

# Project 2007 Level 1

- Audience** This course is for a new user of Microsoft Project with no prior experience in the product. Students should have experience with a PC and be comfortable with the keyboard, mouse, and Windows. Project management experience is not required but is recommended.
- Description** This course uses a combination of lecture, hands-on practice, and independent exercises to familiarize students with the concepts of Microsoft Project. The topics include Project setup procedures, creating and editing calendars; creating a task list; linking and constraining tasks; Project update procedures; tracking or revising a schedule; using a critical path; tracking progress; and manipulating project data. Resource management, costs, and multiple projects are addressed in the Level 2 course.
- Objectives** After completing this class, students should be able to:
- Identify concepts used in project management
  - Identify desktop and program components
  - Start a new project
  - Create and modify a calendar
  - Enter, edit, and outline tasks
  - Sequence tasks using dependencies
  - Set and clear task constraints
  - Print project information
  - Identify a critical path
  - Compress a schedule
  - Update a project in progress
  - Report variances from a plan
  - View, sort, group, and filter project data
  - Create tables, filters, and views
  - Create custom fields that include formulas, value lists, and graphical indicators
  - Manage filters, fields, tables, and views using the Organizer
- Length** 2 days
- Beyond this Level** When you have successfully completed this class, the next class you should consider is Project Level 2. Level 2 covers defining a resource pool including entering resources, both human and material, understanding both fixed and total costs and defining a resource calendar. Assigning the work formula to calculate task and project costs is discussed and then applied using the fixed term as units, work, and duration. Assigning multiple resources as effort driven vs. driver is covered.



**Beyond this Level (cont.)** Three solutions for handling overallocations are covered including assigning overtime, delaying task and assignments, and leveling resources. Managing multiple project options are introduced including resource sharing, linking tasks between projects, and consolidating two or more projects into one file. Be sure to leave time for practice before registering for the next level.

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**I. Project Management Overview**

- A. What is a Project?
- B. What is Project Management?
- C. Definition of a Project
- D. The Gantt Chart
- E. The Network Diagram
- F. The Critical Path
- G. Resource Management

**II. Microsoft Project Basics**

- A. What is Microsoft Project?
- B. Starting and Exiting Microsoft Project
- C. Identifying Objects on the Screen
- D. Understanding the Toolbars
- E. Opening, Closing, and Saving Files
- F. Working with Project Views
- G. Moving Around a Project Schedule

**III. Project Setup**

- A. Creating a New Project
- B. Selecting a Calendar
- C. Modifying Calendar Working Time Options
- D. Project Setup Procedure
- E. Creating a New Calendar
- F. Managing Calendars with the Organizer
- G. Setting Calendar Options

**IV. Creating a Task List**

- A. Entering Tasks
- B. Entering Task Duration

- C. Applying a Calendar to a Task
- D. Selecting, Editing, and Clearing Data
- E. Inserting and Deleting Tasks
- F. Moving and Copying Tasks
- G. Creating a Summary Task (Outlining)
- H. Hiding and Showing Tasks with Outlining
- I. Changing Outline Display Options
- J. Splitting a Task

**V. Linking Tasks**

- A. What is a Dependency?
- B. Entering Task Relationships
- C. Modifying Relationship Types & Lag Time
- D. Linking Summary Tasks
- E. Auditing Task Dependencies

**VI. Constraining Tasks**

- A. What is a Constraint?
- B. Assigning Constraints
- C. Managing Constraints

**VII. Printing a View (Optional)**

- A. Selecting What to Print
- B. Using Print Preview
- C. Changing Page Orientation and Scaling
- D. Changing Margins and Borders
- E. Changing Headers and Footers
- F. Changing the Legend
- G. Changing Print Options

- H. Printing a View as a Report
- I. Using Page Breaks

### **VIII. Critical Path and Baselines**

- A. Identifying a Critical Path
- B. Displaying Critical Tasks Using a Filter
- C. Displaying Critical Tasks in a Gantt Chart
- D. Displaying Critical Tasks by Formatting Text
- E. Shortening the Schedule
- F. Setting the Baseline
- G. Viewing the Baseline
- H. Revising the Baseline
- I. Setting Multiple Baselines
- J. Clearing a Baseline

### **IX. Updating the Project**

- A. What is Updating?
- B. Understanding Update Calculations
- C. Using the Tracking Toolbar
- D. Using a Quick Update Method
- E. Updating a Complex Plan
- F. Rescheduling the Project
- G. Reporting Variance
- H. Recovery Planning
- I. Procedure to Update a Schedule

### **X. Using Filters to Select Data**

- A. What is a Filter?
- B. Using Standard Filters
- C. Using AutoFilter
- D. What is a Table?
- E. Creating a Custom Filter
- F. Creating an Interactive Filter
- G. Managing Filters

### **XI. Creating Custom Tables**

- A. What is a Table
- B. Using the Standard Tables
- C. Creating a Custom Table
- D. Modifying a Table
- E. Creating a Custom Field - Value List
- F. Creating a Custom Field - Formula
- G. Creating a Custom Field
- H. Adding a Hyperlink to a Task
- I. Managing Tables

### **XII. Using Views**

- A. What is a View
- B. Using the Standard Views
- C. Creating a Single Pane View
- D. Formatting a View
- E. Formatting Text
- F. Formatting Gantt Bars
- G. Changing the Layout
- H. Sorting a View
- I. Grouping Tasks in a View
- J. Creating a Combination View
- K. Managing Views

### **XIII. Appendix - Using Reports**

- A. What is a Report
- B. Using the Standard Reports
- C. Creating a Custom Report
- D. Creating a Monthly Report
- E. Using Visual Reports
- F. Copying a Picture as a Report
- G. Managing Reports

