

## Planning and Monitoring Projects with Microsoft Project™ 2003

### Objectives

Project Management has become part of any organization's managerial techniques. Many organizations such as Banks, which were traditionally, "operations oriented" are now turning towards managing their work on a project by project basis. Apart from the need to learn Modern Project Management techniques, such organizations find themselves in need of a robust software product that allows them to plan, monitor and control their projects.

Microsoft Project™ 2003 is such a product. It is part of a suite of products that Microsoft entitles: Enterprise Project Management (EPM).

Microsoft Project Professional is a stand alone product that the Project Manager uses to plan, monitor and control his or her projects.

This workshop has the objective of training the attendees in the use of Microsoft Project.

### How is this Workshop Different from the Competition?

Most MS Project workshops being given in the market are given by young IT professionals who know the product but have not used it in their projects. This is not the right way to learn MS Project.

The most suitable manner to learn MS Project is to learn it from a practicing professional who uses MS Project in his daily work.

The workshop is based on teaching the participants how to use MS Project for planning and managing projects, not just how to use the menus.

### What Will You Learn in the Workshop?

The attendees will be trained on Microsoft Project 2003 and will learn the following:

1. How to setup Microsoft Project and customize it for local and enterprise work.
2. How to prepare the work breakdown structure of a new project identifying all tasks to be carried out in the project.
3. How to plan the scheduling of all tasks and activities. This covers the assessment of duration and the sequencing of the tasks in a logical and operational manner.
4. How to plan the required resources by identifying all such resources as labor, material and related services.
5. How to assign resources to the tasks according to availability
6. How to analyze the first draft of the Project plan (WBS, schedule and resources) through various reports
7. How to adjust the plan to meet schedule and budget requirements
8. How to track the progress in a project during execution. Monitoring activities for their time, dates and completion allows the Project Manager to control the project.
9. How to handle multiple projects.
10. Enterprise project management

The above will be learnt practically by going through over 100 hands on exercises on the PCs provided for each attendee during the workshop.

More importantly, the instructor will use his experience giving Modern Project Management workshops, will provide the above exercises within the framework of such modern principles as are based on the Project Management Institute.

## Content

The Project Management Institute issues a guide prepared by the PMI's standards committee called the Guide to the Project Management's Body of Knowledge or PMBOK, as it is known in the industry. This book has sold more than 400,000 printed copies and is available for download from the institute for its members. It was recently adopted by ANSI (American National Standards Institute) as the de facto standard for project management. Comparison with ISO9004 (Now ISO10006) shows a major similarity in the approach to improving the quality of project management.

The PMBOK requires the Project Manager to use many techniques that are part and parcel of Microsoft Project's arsenal of facilities and features such as: work breakdown structure, resource planning, scheduling, risk management, etc.

The workshop will stress on the knowledge areas of the PMBOK as and when they are touched upon during the Microsoft Project training.

## Who should Attend?

Project Management was traditionally the realm of senior vice presidents. Today, professionals in all walks of life get interfaced with various Projects within the organization. They require the discipline of project management. Persons doing any of the following will need to be proficient in the disciplines of Project Management. Any persons involved in the following would benefit:

- Engineers on technical projects
- Those embarking on promotional drives such as planning and controlling advertising campaigns, preparation of materials for media, printing projects, market surveys and research, etc.
- Marketing personnel
- Persons involved with launching new services, departments or divisions.
- Contractors
- Launching new products or services
- Starting new departments
- Embarking on Reengineering or TQM projects
- Training planners
- Preparing for mergers, acquisitions, splits, etc.
- Embarking on various technical projects such as IT, installation of ATM's, new exchanges, Internet web sites, eCommerce, etc.
- IT Managers
- Project Leaders
- Operations Managers
- Technical Directors
- Auditors and Financial Comptrollers
- Senior Directors
- Persons involved with launching new services, departments or divisions.

Even if there are persons with Project Management experience or training, it would be of interest to them to review the modern methods included in the workshop.

## Duration

The proposed duration of the workshop is 18 hours which can be spread over 3 - 4 days. It is strongly advised that attendance should be around 15 to allow the instructor enough time to address the needs of each.

## Pre-Requisites

Attendees will be provided with one PC each to use for all the exercises.

Topics Covered:

**1. Setting up a Project**

- Define a Project and Enter Its Information
- Define the General Working Times - Calendars
- General Options

**2. Entry of the WBS**

- Entry of Tasks
    - Importing Tasks from Excel
    - Organize Tasks into Phases - Outlining
    - Entering WBS Codes
    - Attach and View More Task Information
    - Adding Supplementary Information to Tasks
    - Manipulating the Task Sheet View
  - Managing the Duration of Tasks
    - Setup of Duration Parameters
    - Using Milestones in a Project
    - Estimated vs Confirmed Durations
    - Elapsed Durations
    - Calculating Most Probable Duration (PERT)
    - Scheduling Tasks to Achieve Specific Dates
    - Setting Deadline Reminders
  - Different Types of Task Dependencies
    - Creating the Finish-to-Start Task Dependency
    - Other Task Relationships
    - Overlapping using Lead Time
    - Delaying Linked Tasks by Adding Lag Time
    - Reviewing Task Dependencies
  - Working with Task Calendars
    - Assigning a Specific Calendar to a Task
  - Other Task Editing Facilities
    - Interrupt Work on a Task (Split)
    - Enter Recurring Tasks
- 3. Customizing Our Project Information**
- Customizing the Tool Bar
  - The Organizer
  - Customizing Views
  - Customizing the VIEW Menu
  - Customizing Tables
  - Customizing Fields
- 4. Entry of Resources**
- Entry of Resource Data
  - Adding Supplementary Information to Resources
  - Manipulating the Resource Sheet View
  - Importing Resources from Excel
  - Adding More Fields of Resource Information
  - Specifying Resource Availability
  - Specifying Resource Availability Over Time
  - Specifying a Resource's Calendar or Working Time
  - Specifying Multiple Rates for a Resource
  - Adding Material Resources to the Project

## **5. Assigning Resources to Tasks**

- Assigning Resources to a Task
- Assigning Fixed Costs to Tasks
- Finding the Right Resources for the Job
- Defining Generic Resources
- Assigning Material Resources to Tasks
- Filtering Resources with Available Time
- Viewing the Graphs of Resource Availability
- Viewing Assignments
- The Assignment Information Dialog Box
- Multiple Resource Rates
- Applying Contours to Assignments

## **6. Analyzing the Project**

- Customized Reports
- Reviewing Assignment Costs
- Reviewing Resource Costs
- Reviewing Task Costs
- Reviewing the Total Planned Cost for the Project

## **7. Understanding Work Assignments and the Work Formula**

- Effort Driven - Fixed Units
- Effort Driven - Fixed Duration
- Effort Driven - Fixed Work
- NOT Effort Driven - Fixed Units
- NOT Effort Driven - Fixed Duration
- NOT Effort Driven - Fixed Work

## **8. Adjusting the Project - Reducing Duration**

- Viewing the Critical Path
- Viewing Finish Dates and Project Summary
- Checking and Adjusting Date Constraints
- Shortening the Project Through Task Adjustments

## **9. Adjusting the Project - Reducing Costs**

- Viewing Project Costs
- Viewing Resource Workloads
- Adjusting Assignments Availability to Reduce Costs
- Using Overtime to Reduce Over-Allocation

## **10. Tracking Your Project - Saving Baselines**

- Saving the Project With a Baseline (1 or more)
- Adjusting a Project With a Saved Baseline
- Reviewing Baseline Information
- Saving Additional Start and Finish Dates
- Clearing a Baseline

#### **11. Tracking Your Project - Updating Task Progress**

- Using the Tracking Toolbar
- Updating the Project As Scheduled
- Entry of Task Completion Percent
- Enter Actual Duration
- Entry of Actual Start and Actual Finish
- Entry of Percentage Work Complete
- Entry of Actual Work Completed and Remaining Work
- Entering Actual Work Complete by Time Period
- Rescheduling the Project

#### **12. Analyzing the Project - After Tracking**

- Working with Progress Lines
- Earned Value Analysis
- Exporting Tables to Excel
- Analyzing Project Data Using Pivot Tables

#### **13. Handling Multiple Projects**

- Consolidating Projects
- Resource Pools
- How Do We Know Which Project is Using Which Resource?
- Cross Linking Projects (Dependencies)

#### **14. Enterprise Project Management**

- Accessing the Project by the Project Manager
- Team members and their access
- Top management and their access
- Customizing the environment for Enterprise projects

## **1.0 Using Visual Basic for Applications with Microsoft Project**

---

We consider VBA as a programming language and as such, it requires a fair amount of time and effort to be mastered.

Should the organization wish to include Visual Basic for Applications as applied to Microsoft Project, then the above material should be customized to cater for the additional time needed for VBA. The time and duration depends on the programming competence of the attendees, especially in Visual Basic.

It is expected that an additional 18 hours would be required for the mastering of VBA for Microsoft Visio unless the attendants have a working knowledge of at least one programming language, preferably Visual Basic.