

# Project Tutor

factsheet

## Comprehensive learning is just a click away

As you know, there's a lot of functionality in Microsoft Project that can often be bewildering to the user. Let the comprehensive learning in Project Tutor explain how it all works; from creating simple task plans all the way to optimizing resource utilization in multi-project environments (plus of course it will teach you all the important bits in between).



Supports Microsoft Project 2016, 2013, 2010, Standard & Professional, Project Online Professional.

Managing projects can be tough. Learning Microsoft Project shouldn't be.

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## Module A Project preliminaries

## Contents

This first module is all about getting started with Microsoft Project. Its lessons will teach you about the software's user interface and how you can communicate with it. You will learn about toolbars and menus, task panes and help. Microsoft Project's views will be introduced, along with the different data types that can be seen within the views. You will learn how to create a new project plan, open an existing project plan and how to successfully save data to disk. You will also learn how working time and nonworking time can be defined by the use of calendars. Finally, you will learn how to create a resource pool for your project, together with an understanding of detailed resource definition.

- Getting started
- Using the fluent user interface
- Ribbon bar tabs, groups and buttons
- The backstage view and the Quick Access toolbar
- Creating a new project plan
- Entering file properties
- Ways to view the project's data
- How to save a project to disk
- Base calendars and calendar options
- Managing calendar exceptions
- Creating new base calendars
- Managing calendar workweeks
- Creating work resources
- Creating material resources
- Creating cost and budget resources
- Adding detail to resource definitions

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## Module B Planning the work

## Contents

This second module is all about creating and defining the tasks within a project. Its lessons will teach you how to create and list tasks. You will learn how to create, organize and manage a project's outline. You will then define a duration for each task as your best estimate of how long that task will take to complete. Further task definition will be achieved by using task notes and creating hyperlinks. You will learn how to create links between tasks that will determine the schedule of a project. Finally, you will learn various ways that the project's schedule can be viewed and interpreted.

- About outlines
- Entering tasks into a list
- Inserting milestones, tasks and summaries
- Managing a task list
- Changing tasks into milestones
- Applying outlining functions
- Adding more detail to tasks
- Tasks and task calendars
- Setting task scheduling modes
- Entering durations for automatically-scheduled tasks
- Entering durations for manually-scheduled tasks
- About linking tasks
- Links between automatically-scheduled tasks
- Linking to and from manually-scheduled tasks
- Responding to schedule warnings
- Highlighting changes with undo and redo
- Using the network diagram
- Changing how the outline is displayed
- Using outline numbers
- Displaying project-level information
- Using the task form view
- Displaying links between tasks

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## Module C Reviewing the schedule

## Contents

This third module concentrates on reviewing the schedule of a project. Its lessons will teach you how to use tables and text styles to display specific information about a project and its tasks. As a project usually has a critical path, you will learn how to emphasize this and also how to indicate slack both graphically and as a value. You will also learn how Microsoft Project can produce information in printed form, together with the wide variety of options in how a printed view can be configured.

- About critical path analysis
  - About Gantt charts
  - Viewing critical and non-critical tasks
  - Using the Detail Gantt view
  - Applying bar style formatting to the view
  - Using the Task Inspector to analyze a schedule
  - Highlighting task paths
  - Zooming a timescale in and out
  - Making detailed timescale changes
  - Tasks and timelines
  - Formatting and sharing timeline information
  - Using page setup
  - Preparing to print the view
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## Module D Assigning people and costs

## Contents

This fourth module looks at how resources and tasks are combined together to form assignments. It is these assignments that create the work, which in turn incurs cost. Its lessons will teach you how to create and manipulate resource assignments to create a realistic project schedule. As assignments are controlled by task types and whether the task is effort driven or not, you will learn how to establish these important parameters and understand the implications that they can have. You will also learn about the impact that assignments can have upon the project's schedule as it now becomes a much more accurate representation of what should happen when.

- About assignments
  - Assigning one person to a task
  - Multiple assignments against one task
  - Changing task scheduling options
  - Changing assigned work and assigned units
  - Assignments and availabilities
  - Assigning material resources
  - Assigning cost resources
  - Adding fixed costs to tasks
  - Viewing cost schedules
  - Setting project budgets
  - About task type options
  - Fixed duration tasks
  - Fixed work tasks
  - Non effort driven tasks and their assignments
  - Setting tasks as effort driven
  - Creating skill-based assignments
  - Editing task work values
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This fifth module illustrates the effects that the outside world can have upon the tasks and resources within a project. You will learn about the default options that govern how Microsoft Project works; for example how the project's schedule is calculated, and how projects are viewed and saved to disk. You will also learn how tasks can be constrained, together with the far-reaching effect that this can have upon the project's schedule. As resources can also be constrained, you will learn about the various options that are available, together with the results that can be obtained.

- Changing view and general defaults
- Changing schedule settings
- Changing calculation settings
- Updating local and global settings
- Creating a template
- Customizing the quick access toolbar
- About dependency types
- Overlapping tasks
- Creating gaps between tasks
- About task constraints
- Applying a flexible constraint
- Fixing tasks and milestones to dates
- Applying deadlines to tasks
- Inserting a recurring task
- Finding constrained tasks
- Checking project-wide constraints
- About resource supply restrictions
- Resources and availability profiles
- Resources and nonworking time
- How availability profiles affect schedules
- How resource calendars affect schedules
- Creating cost profiles for resources

This sixth module looks at how data within Microsoft Project can be viewed and effectively managed. You will learn how to create and manage customized information in the form of custom fields, custom views, custom tables, custom filters and custom groups. You will also learn how all these customized components can be shared between projects, thus promoting standardization. As Microsoft Project can provide a wealth of online information, you will also learn how this information can be published and viewed within other Office applications.

- Creating a lookup table
- Applying lookup table values
- Defining a custom formula
- Applying a custom formula
- Selecting data using filters and highlights
- Applying an AutoFilter
- Creating custom AutoFilters
- Grouping common data
- Applying views from the view library
- Creating and editing views
- Editing table definitions
- Changing sheet settings
- Configuring the network diagram
- Using the calendar view
- Assignment work values and tasks
- Assignment cost values and tasks
- Assignment values for resources
- Grouping by resource usage
- Resources and the team planner
- Viewing resource graphs
- Exporting timephased information into Excel
- Viewing report information
- Sharing report information
- Renaming an existing report
- Changing a report's format
- Changing a report's content
- Customizing a visual report
- Copying views as pictures
- Exporting custom data to Excel
- Managing project components using the Organizer
- Recording and applying a macro

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## Module G Optimizing people and plans

## Contents

Module seven explores the various options available within Microsoft Project to optimize the relationship between a project's tasks and the resources that will perform the work upon the tasks. You will learn how to determine which resources have conflicts, when the conflicts happen and (most importantly) the reason for the conflicts. Once you understand the nature of the conflict, you will then learn how to compare the project's schedule before and after the conflict is resolved. You will also learn about the various options available to control how Microsoft Project performs the leveling process, together with ways to evaluate the benefits and the impact that the leveling has provided. To help you interactively optimize resource allocations you will also learn various ways to edit individual assignments.

- About resource conflicts
- How and why conflicts exist
- Viewing overallocation reports
- Finding when conflicts occur and what is causing them
- Preparations before resolving conflicts
- About resource leveling
- Using leveling options
- Using the Leveling Gantt view
- Selective leveling
- Leveling all
- Finding changes to tasks and their schedules
- Leveling delays and critical paths
- Schedule changes and task drivers
- Reviewing leveling's effect on resources
- Checking for resource availability
- Replacing assigned resources
- Creating a contoured assignment
- How and when to re-level

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## Module H Progressing the plan

## Contents

Module eight takes the project from the planning stage into actually performing the work upon the tasks and the achievement of the overall project objectives. You will learn how to create baselines to provide comparisons of what should have been achieved with what has been achieved and what will be achieved. You will learn how to establish past / future boundaries and how these boundaries can best be applied. You will learn how to update tasks with simple time-based progress in terms of completions and actual / remaining time. You will also learn ways to create a more detailed update by using assignment-based progress and entering in actual and remaining work. As work doesn't always proceed according to plan, you will also learn how to reschedule uncompleted work into the future, together with the implications that this can bring.

- About baselines
- Creating baselines
- Establishing status dates
- Establishing update frequency
- Bar styles for the Tracking Gantt view
- Tables and gridlines for the Tracking Gantt view
- About task updates
- Updating tasks as 100% complete
- Using percent complete for in progress tasks
- Updating milestones that have been achieved
- Updating when tasks actually started
- Updating tasks with actual finish dates
- Updating with actual and remaining duration values
- About assignment updates
- Task progress and resource work
- Updating task progress
- Changing how assignments are updated
- Updating assignment progress
- Scheduling new work against in progress tasks
- Entering detailed assignment actuals
- Updating actual cost values
- Reviewing actual cost values
- Rescheduling remaining work

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## Module I Replanning the future

## Contents

This ninth module looks at the effect of updates to a project and the variances that they can create. As variances can have a dramatic effect upon the schedule of a project's tasks and its resources, you will learn how to find and evaluate where these variances are and what has caused them. You will also learn how to find where scheduling conflicts exist and determine their cause and also their magnitude. You will learn how to perform an earned value assessment against a project to get an early warning of cost or schedule overruns. Once you have analyzed the effects of the progress, you will then apply methods, skills and abilities learnt throughout this training course to amend the schedule and outcome of the project. You will perform various what-if analyses against tasks, resources and assignments to return the project to meeting its objectives.

- About variances
- Project status and dashboards
- Using reports to monitor schedule performance
- Using reports to monitor work and cost performance
- Finding slippages using filters
- Making schedule comparisons against a baseline
- Analyzing slippages using formulae
- Using formulae for filtering and grouping
- Comparing the current schedule against constrained dates
- Analyzing schedule changes using formulae
- Finding resources and tasks that are overbudget
- Analyzing work performance using formulae
- About earned value analysis
- Assessing earned value from the top down
- Producing earned value reports
- Exporting earned value information to Excel
- Finding and assessing EVA schedule and cost variances
- Analyzing earned value using custom fields
- Using EVA to aid replanning
- About replanning options
- Project situation report
- Scenario (a) Modifying task schedules and resource costs
- Scenario (b) Editing tasks and reducing scope
- Scenario (c) Editing assignments and resource schedules

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## Module J Multiple project environments

## Contents

Module ten illustrates the options available within Microsoft Project to create and manage a multiple project (or programme) environment. As managing several linked projects presents additional challenges compared to managing a single project, you will learn about the implications and prerequisites of a multi-project environment. You will also learn how to consolidate projects together and then how these projects can be analyzed and reported upon. As sharing resources between projects is a main reason for consolidating them together, you will also learn how to create a common resource pool and the implications that must be considered. To ensure that people within the programme of work are used as effectively as possible, you will also learn ways to effectively manage a shared resource pool.

- About project consolidations
- Creating a master project
- Inserting subprojects
- Creating codes for tasks
- Applying task codes
- Creating subproject links
- Reviewing the master project
- Reviewing individual subprojects
- About shared resource pools
- Configuring a resource pool
- Linking projects to a shared pool
- Assigning pool resources to tasks
- Viewing resource assignments within the pool
- Optimizing shared resource usage