

Project Advanced – 2 days



Course Objectives

Learn how to make the most of planning and managing projects using the more advanced features of Microsoft Project.

Prerequisites

This course assumes that you have attended our Introduction/Intermediate level course or you have a good understanding of Microsoft Project, project management techniques and can create/manage a project.

Exercises

This course is instructor led, involving the utilisation of examples and exercises in a workshop environment.

Topics

Other Applications

- Understanding Working With Applications
- Copying a Gantt Chart Image
- Copying Table Data
- Copying to Microsoft Excel
- Linking to Microsoft Excel
- Exporting to Microsoft Excel
- Exporting to Excel Using a Map

Formatting Projects

- Displaying Progress Lines
- Working With Progress Lines

Project Templates

- Understanding Project Templates
- Examining the Templates
- Saving a Project as a Template
- Using a Custom Project Template
- Specifying the Personal Templates Folder
- Using the Personal Template Folder
- Modifying a Template
- Understanding the Global Template
- Organising the Global Template
- Applying a Newly Organised Item
- Removing Items From the Global Template

Linking and Combining Projects

- Understanding Linked Projects
- Combining Projects
- Viewing a Combined Project
- Printing From a Combined Project
- Setting a Combined Project Start Date
- Changing Data in a Combined Project
- Saving and Closing a Combined Project
- Using Only the Combined Project File
- Using Only Subproject Files
- Inserting Subprojects
- Breaking Subproject Links
- Creating a Read Only Subproject
- Inserting Task Links
- Creating a Summary Milestone

Shared Resources

- Understanding Resource Sharing
- Creating a Common Resource Pool
- Linking to an External Pool
- Linking a New Project File to the Pool
- Assigning Resources From the Pool
- Working With Shared Resources
- Checking for Resource Links
- Managing Shared Resources
- Opening Shared Resource Projects
- Opening the Resource Pool Only
- Assembling a Resource Master
- Working With a Resource Master

Downsizing Larger Projects

- Understanding Project Downsizing
- Creating the Resource File
- Creating Smaller Projects
- Linking Subprojects to Resources
- Preparing for the Master Project
- Creating the Downsized Master File
- Setting Project Links
- Finalising the Master

Custom Fields

- Understanding Custom Fields
- Creating Custom Fields
- Inserting Custom Fields
- Creating A Formula In A Custom Field
- Modifying A Formula
- Testing A Formula
- Understanding Graphical Indicator Custom Fields
- Creating Graphical Indicator Custom Fields
- Creating A Lookup Custom Field
- Creating An Outline Code Mask
- Entering Lookup Table Values
- Using A Lookup Table

WBS Codes

- Understanding WBS Codes
- Creating WBS Codes
- Altering Tasks With Custom WBS Codes
- Renumbering WBS Codes
- Editing Custom WBS Codes

Tables

- Adding Simple Custom Fields
- Formatting Table Fields
- Creating A Simple Lookup Table
- Using A Custom Table
- Using A Hyperlink Field

Custom Views

- Preparing For The Custom View
- Creating A Custom Filter For The View
- Creating A Custom Group For The View
- Creating A Custom Table For The View
- Creating The Custom View
- Removing A Custom View And Its Components

Controlling Project Data

- Creating a Custom Filter
- Using a Custom Filter

Graphical Reports

- Understanding Graphical Reports
- How Graphical Reports Work
- Running A Report
- Formatting Chart Objects
- Manipulating Report Data
- Filtering Report Data
- Cloning An Existing Report
- Creating A New Report
- Enhancing Report Appearance
- Making Reports Global
- Removing Unwanted Reports

Visual Reports

- Understanding Visual Reports
- Understanding Excel Visual Reports
- Creating A Visual Report From A Template
- Choosing Fields To Display In A Visual Report
- Changing The X Axis Categories
- Filtering A Visual Report
- Formatting A Visual Report
- Saving A Visual Report As A Template
- Using A Custom Visual Report Template