

MS project course (outlines)

Part I: Project Management Basics

Chapter 1 : The Nature of Projects

- Understanding Projects
- Exploring project management
- Critical path and slack
- Durations and milestones
- Resource-driven schedules and fixed-duration tasks
- Diagrams that aid project management
- Dependencies
- Managing projects with project management software
- What's required of you
- What Microsoft Project can do to help
- The Life Cycle of a Project
- Identifying your goal and the project's scope
- Planning
- Revising
- Tracking
- Learning from your mistakes
- Summary

Chapter 2: Exploring the Microsoft Project Environment

- Taking a First Look at Project
- Starting Project
- Working with the Project Guide
- Examining the Gantt Chart view
- Using Project menus
- Examining the toolbars
- Entering information
- Changing views
- What's New in Project
- Summary

Part II: Getting Your Project Going

Chapter 3: Creating a New Project

- Gathering Information
- Determining detail tasks
- Establishing time limits
- Lining up your resources
- Looking at dependencies
- Opening a Project File
- Opening a project file — the usual way
- Other ways to open or start projects
- Establishing Basic Project Information
- Looking at Project Calendars
- Setting calendar options
- Setting schedule options
- Creating a new calendar
- Adjusting the calendar
- Entering Tasks
- Adding Subtasks
- Saving Project Files
- Saving files

- Saving files as templates
- Protecting files
- Closing Project
- Working with a Project Outline
- Adjusting tasks in an outline
- Copying tasks
- Displaying and hiding tasks
- Getting Help
- Using the Help system
- Finding online help
- Summary

Chapter 4: Building Tasks

- Establishing Timing for Tasks
- Fixed-unit tasks
- Fixed-duration tasks
- Fixed-work tasks
- Effort-driven tasks
- Assigning Task Timing
- Using the Gantt table
- Using the Task Information dialog box
- Using your mouse and the task bar
- Setting scheduling options
- Assigning a calendar to a task
- Creating milestones
- Timing for summary tasks
- Using Recurring Tasks
- Establishing Constraints and Deadline Dates
- Understanding constraints
- Using deadline dates
- Setting constraints and deadline dates
- Manipulating the Gantt Chart to View Timing
- Entering Task Notes
- Establishing Dependencies Among Tasks
- Understanding dependencies
- Understanding the interactions between constraints and dependencies
- Allowing for delays and overlap
- Dependency types
- Finish-to-Start (FS)
- Start-to-Finish (SF)
- Start-to-Start (SS)
- Finish-to-Finish (FF)
- Establishing dependencies
- Setting finish-to-start dependencies
- Setting other types of dependencies
- Viewing Dependencies
- Deleting Dependencies
- Summary

Chapter 5 : Creating Resources and Assigning Costs

- Understanding Resources
- How resources work
- How Project uses resource information to affect the schedule
- How Project gathers cost information
- Creating a Resource List
- Modifying Resource Information
- Assigning a communication method
- Specifying resource availability

- Specifying a booking type
- Creating a generic resource and assigning custom fields
- Creating a budget resource
- Adding notes to a resource
- Calendars and resources
- Modifying a resource's working hours
- Blocking off vacation time
- Using Resources and Tasks
- Assigning resources to tasks
- Assigning a budget resource
- Getting help while selecting resources to assign
- Some tips about resource assignments
- Removing or replacing a resource assignment
- Handling Unusual Cost Situations
- Looking at the project's cost
- Assigning fixed costs
- Assigning a fixed cost to a task
- Assigning a fixed resource cost to a task
- Accounting for resource rate changes
- Summary

Part III: Refining Your Project

Chapter 6: Understanding the Basics of Views

- What Is a View?
- Changing a table
- Changing a Details section
- Examining Indicators
- Admiring the Views
- Calendar
- Detail Gantt
- Gantt Chart
- Leveling Gantt
- Tracking Gantt
- Multiple Baselines Gantt
- Network Diagram
- Descriptive Network Diagram
- Relationship Diagram
- PERT analysis views
- PERT Entry Sheet
- Optimistic Gantt
- Expected Gantt
- Pessimistic Gantt
- PERT Weights
- Resource Allocation
- Resource Form
- Resource Graph
- Resource Name Form
- Resource Sheet
- Resource Usage
- Rollup views
- Using the summary task bar
- Using the Rollup_Formatting macro
- Switching rollup views
- Task Details Form
- Task Entry
- Task Form
- Task Name Form

Task Sheet
Task Usage
Printing Your Project
Summary

Chapter 7: Using Views to Gain Perspective

Customizing Views
Changing tables
Changing row height and column width
Hiding and inserting columns
Adding fields to a usage view
Switching tables
Creating new tables or editing existing tables
Working with views
Adding views
Creating a combination view
Ordering Tasks in a View
Sorting tasks
Creating WBS codes
Renumbering WBS codes
Defining outline numbers
Filtering Views to Gain Perspective
Applying a filter to a view
Creating custom filters
Using AutoFilters
Using grouping
Summary

Chapter 8 : Modifying the Appearance of Your Project

Changing Project's Looks
Using the Gantt Chart Wizard
Formatting Elements One by One
Working with text
Formatting selected text
Applying formatting to categories of text
Changing taskbars
Formatting taskbars
Changing the layout of the Gantt Chart
Changing gridlines
Changing network diagrams
Formatting network diagram nodes
Modifying node box styles
Formatting fields that appear on nodes
Changing the layout of the network diagram
Formatting the Calendar view
Formatting the Calendar entries
Changing the Calendar layout
Inserting Drawings and Objects
Copying pictures
Using visuals in schedules
Inserting visual objects
Using the Drawing toolbar
Modifying graphics and drawings
Summary

Chapter 9 : Resolving Scheduling Problems

Resolving Scheduling Conflicts
Adding resources to tasks

- Using overtime
- Adding time to tasks
- Adjusting slack
- Changing task constraints
- Adjusting dependencies
- Splitting a task
- Using the Critical Path to Shorten a Project
- Identifying the critical path
- Shortening the critical path
- Using Multiple Critical Paths
- Summary

Chapter 10: Resolving Resource Problems

- Understanding How Resource Conflicts Occur
- Spotting Resource Conflicts
- Using views to spot resource conflicts
- Using filters to spot resource conflicts
- Resolving Conflicts
- Changing resource allocations
- Switching resources
- Adding a task assignment to a resource
- Adding or deleting a resource assignment
- Scheduling overtime
- Redefining a resource's calendar
- Assigning part-time work
- Controlling when resources start working on a task
- Delaying tasks by leveling resource workloads
- Letting Project level resource loads
- Making adjustments to leveling
- Contouring resources
- Setting a contour pattern
- Contouring a resource's availability
- Pooling resources
- Summary

Part IV: Tracking Your Progress

Chapter 11: Understanding Tracking

- Understanding the Principles of Tracking
- Estimates versus actual
- Making adjustments as you go
- Using Baselines
- What is a baseline?
- Setting a baseline
- Changing the Baseline
- Adding a task to a baseline
- Using interim plans
- Clearing a baseline or interim plan
- Viewing Progress with the Tracking Gantt View
- Interpreting the Tracking Gantt view
- The Task Variance table
- The Task Cost table
- The Task Work table
- Understanding Tracking Strategies
- Tackling the work of tracking
- Keeping track of tracking
- Summary

Chapter 12: Recording Actual

- Organizing the Updating Process
- Understanding Calculation Options
- Updating Tasks to Reflect Actual Information
- Setting actual start and finish dates
- Recording actual durations
- Setting the Percent Complete value
- Setting work completed
- Setting remaining durations
- Using Actual and Costs
- Using the Cost table for tasks
- Using the Cost table for resources
- Overriding resource cost valuations
- Techniques and Tips for Updating
- Tracking work or costs regularly
- Accelerating the updating process
- Letting Project reschedule uncompleted work
- Reviewing Progress
- Using the Tracking Gantt view
- Using the Work table for tasks
- Using the Work table for resources
- Viewing progress lines
- Summary

Chapter 13 : Reporting on Progress

- Creating Text Reports
- Looking at the big picture
- Project Summary
- Top Level Tasks
- Critical Tasks
- Milestones
- Working Days
- Generating reports on costs
- Cash Flow
- Earned Value
- Budget
- Overbudget reports
- Producing reports on time
- Unstarted Tasks
- Tasks Starting Soon
- Tasks in Progress
- Completed Tasks
- Should Have Started Tasks
- Slipping Tasks
- Preparing reports on work assignments
- Who Does What
- Who Does What When
- To Do List
- Overallocated Resources
- Reporting on workloads
- Task Usage
- Resource Usage
- Customizing reports
- Custom reports
- Customizing an existing report
- Visual Reporting
- Task Usage reports
- Cash Flow Report

- Earned Value Over Time Report
- Resource usage reports
- Cash Flow Report
- Resource Availability Report
- Resource Cost Summary Report
- Resource Work Availability Report
- Resource Work Summary Report
- Assignment Usage reports
- Baseline Cost Report
- Baseline Report
- Baseline Work Report
- Budget Cost Report
- Budget Work Report
- Summary reports
- Critical Tasks Status Report
- Task Status Report
- Resource Remaining Work Report
- Resource Status Report
- Customizing visual report templates
- Summary

Chapter 14: Analyzing Financial Progress

- Understanding Earned Value
- Understanding earned value fields
- Using the Physical % Complete method to calculate earned value
- Setting the date for earned-value calculations
- Using earned value tables
- Using the Earned Value table for tasks
- Using the Earned Value table for resources
- Using the Earned Value Cost Indicators and Earned Value Schedule Indicators tables
- Evaluating Cost Information
- Charting earned value
- Using PivotTables for analysis
- Making Adjustments During the Project
- Changing the schedule
- Modifying resource assignments
- Summary

Part V: Working in Groups

Chapter 15: Coordinating Multiple Projects Outside Project Server

- Consolidating Projects
- Setting up to use consolidation
- Inserting a project
- Using inserted projects and their source files
- Consolidating all open projects: A shortcut
- Moving subprojects within a consolidated project
- Understanding Consolidated Projects and Dependencies
- Linking tasks across projects
- Changing links across projects
- Consolidated projects — to save or not to save
- Viewing Multiple Projects
- Viewing the Critical Path across Projects
- Sharing Resources Among Projects
- Creating a resource pool and sharing the resources
- Opening a project that uses a resource pool

Updating information in the resource pool
Quit sharing resources
Summary

Chapter 16: Preparing to Use Project Server

Understanding Project Server and Project Web Access
What's New in Project Server
Planning the Project
Assessing requirements
Identify the people who will approve the Project Server design
Identify staff members to interview
Create a requirements definition questionnaire
Conduct interviews
Calculate ROI
Designing the system
Assessing the technology environment
Addressing special needs
Establishing and enforcing organizational standards
Training
Developing a strategy for implementation and configuration
Avoiding the Pitfalls
Summary

Chapter 17 : Installing and Configuring Project Server

Reviewing Requirements
Meeting software requirements
Software requirements for servers
Software requirements for client computers
Meeting hardware requirements
Hardware requirements for servers
Hardware requirements for client computers
Assessing the network environment
Considering software/hardware scenarios
The Small Server Farm
The Medium Server Farm
The Large Server Farm
Installing Peripheral Software
SQL Server and Analysis Services
Checking the SQL version
Internet Information Services (IIS)
Enabling IIS
Checking the IIS mode
Installing NET Framework
Setting Up Windows Security Accounts
Windows SharePoint Services Service account
The Application Pool security account
Site Collection Owner account
Shared Service Provider Administrator account
Project Server Instance Administrator account
Creating an account
Installing Project Server and Windows SharePoint Services
Connecting to Project Server through Project Web Access
Troubleshooting Your Installation
Summary

Chapter 18: Project Server and the Administrator

Double-Checking Settings
Specifying Project Server features for your organization

- Managing Windows SharePoint Services
- Managing Security Settings
- Managing security templates
- Managing groups
- Working with categories
- Managing Users
- Working with Views
- Working with the Enterprise Global Template
- Working with the Enterprise Global
- Defining Enterprise custom fields
- Creating Enterprise calendars
- Setting Up and Editing Enterprise Resources
- Creating the Enterprise Resource Pool
- Editing resources in the Enterprise Resource Pool
- Importing Projects
- Managing Timesheet and Task Settings
- Financial Periods
- Timesheet Periods
- Timesheet classifications
- Timesheet Settings and Defaults
- Task Settings and Display
- Close Tasks to Update
- Setting Up Administrative Time
- Customizing Project Web Access
- Control the appearance of the Quick Launch pane
- Selecting the Gantt taskbar styles and timescales
- Selecting grouping formats
- Housekeeping Chores
- Checking in enterprise projects and resources
- Managing information in the Project Server databases
- Backing up and restoring
- Schedule backups
- Make a backup
- Restore a backup
- Managing the Queue
- Managing the OLAP cube
- Migrating the Analysis Services Repository
- Configuring the cube
- Establish cube building settings
- Checking cube building status
- Enabling users to view the cube
- Managing operations
- Alerts and reminders
- Configuring the server-side event handler
- Synchronizing the Enterprise Resource Pool with an Active Directory Group
- Working with Project Workspaces
- Summary

Chapter 19 : Project Server and the Project/Resource Manager

- Connecting to Project Server
- Creating a Project Server logon account
- Logging on to Project Server
- Creating a Web-Based Project
- Understanding the structure of the Project Server database
- Reviewing a project's Web-based options
- Storing a draft project in the Project Server database
- Publishing project information

- Working with Web-Based Projects
- Opening a project stored in the Project Server database
- Understanding the Open dialog box
- Opening a draft project or a published project
- Closing a project stored in the Project Server database
- Managing the local cache
- Viewing Project Server pages in Project Professional
- Using activity plans and proposals
- Assigning Resources to Projects
- Adding enterprise resources to your project
- Replacing generic resources with real resources
- Notifying resources of assignments
- Using the Resource Substitution Wizard
- Assigning resources using Project Web Access
- Tracking Progress
- Establishing a tracking method
- Setting up status reports
- Receiving updates from team members
- Working with issues and risks
- Tracking issues
- Tracking risks
- Managing deliverables
- Summary

Chapter 20: Project Server and the Day-to-Day User

- Logging on to Project Web Access
- Reviewing the Home Page
- Customizing the Home Page
- Viewing Information
- Working with your tasks
- Entering time on tasks
- Submitting task updates
- Adding tasks
- Reassigning a task
- Working with your timesheet
- Entering time
- Saving timesheet entries
- Reporting administrative time
- Project Web Access and Microsoft Outlook
- Integrating the Outlook Calendar with Project Web Access
- Setting up integration
- Setting integration options
- Importing Project Web Access assignments into Outlook
- Updating Project Web Access with Outlook information
- Working with Documents
- Reporting Status
- Summary

Chapter 21: Project Server and the Executive

- Reviewing Your Portfolio
- Identifying Trends and Potential Problems
- Summary

Chapter 22: Customizing Microsoft Project

- Using Custom Fields
- Customizing data entry
- Creating a custom field
- Using a custom field for data entry

- Using formulas in custom fields
- Modifying the Interface
- Setting levels of Undo
- Windows taskbar icons
- Saving Project files
- Using the Organizer
- Making changes to toolbars
- Combining or separating toolbars
- Adding and deleting tools from a toolbar
- Creating custom toolbars
- Changing and editing button images
- Customizing project menus
- Adding menus
- Assigning new commands
- Deleting commands and menus
- Summary

Chapter 23: Using Macros to Speed Your Work

- Using Macros
- Recording Macros
- Running Macros
- Using Shortcuts to Run Macros
- Assigning a macro to a toolbar button
- Assigning a macro to a menu command
- Assigning a keyboard shortcut to a macro
- Summary

Chapter 24: Customizing Microsoft Project Using VBA and Active Scripting

- Example One: Creating a Filter to See Critical Tasks and Resource Assignments
 - Recording a macro to create a filter for critical tasks
 - Editing the macro to show only specified resources
 - Testing the code
- Example Two: Creating a UserForm Object to Adjust Work
 - Designing the UserForm
 - Creating a UserForm
 - Adjusting the size of the UserForm
 - Adding controls to the UserForm
 - Adding code to the UserForm
 - Adding code to display resource names
 - Adding code to the OK button to change work
 - Adding code to the Cancel button
 - Adding a sub procedure to show the UserForm
- Example Three: Customizing the Project Guide
 - Content of the Project Guide XML document
 - Project Guide XML document elements
 - Defining the Project Guide for a project
 - Customizing the Project Guide to create a new project
 - Adding a new task to the Tasks goal area
 - Creating a custom HTML page
 - Deploying the customized Project Guide
- Summary

Chapter 25: Importing and Exporting Project Information

- Understanding General Importing and Exporting Concepts
- Exporting Information
 - Saving reporting information in an OLAP Cube or an Access database
 - Exporting to Office files

Sending Project data to Excel
Sending Project data to Microsoft Word
Exporting Project information to a graphic image
Exporting to text files
Importing Information
Inserting another project
Importing Office files
Bringing Excel workbook information into Project
Bringing Access database information into Project
Bringing Outlook task lists into Project
Bringing Word document information into Project
Importing other files
Importing Microsoft Project Exchange files
Importing text files
Troubleshooting
Project imports incorrect times in data from Microsoft Excel
Linked or embedded objects don't import or export
The export file contains more or less information than expected
Project imports invalid information
The values of imported information change
The imported project is empty
Project displays imported information in the wrong fields
Summary