

# Microsoft Project Fundamentals

GoSkills online course syllabus

Wednesday, May 15, 2024

<b>Skill level</b>	<b>Lessons</b>	<b>Accredited by</b>
Beginner	44	CPD
<b>Pre-requisites</b>	<b>Versions supported</b>	<b>Video duration</b>
None	Microsoft 365	3h 47m
<b>Estimated study time</b>	<b>Instructor</b>	
19h for all materials	Bill Raymond	

## An Introduction to Project Management

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- 1** **An Introduction to Project Management**  
Recognize when to use project management.
- 2** **Your Role as a Project Manager**  
Your role as a project manager is to deliver a project. Your communications, influence, and careful use of authority all play a major factor in the support you receive to complete the project.
- 3** **Project Negotiations**  
Project managers frequently find themselves with the challenge of adding new scope to a project with an already tight timeline. Typically, the job of the project manager is to work with their team to determine what this new scope will mean and how it will affect the project.
- 4** **About Microsoft Project**  
With Microsoft Project, you can build and track project schedules.

## The Microsoft Project User Interface

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- 5** **Run Microsoft Project for the First Time**  
Recognize best practices when running MS Project for the first time.
- 6** **About the Microsoft Project User Interface**  
The Microsoft Project user interface is made of seven areas. Each of these areas help you perform a particular action.
- 7** **About the Ribbon**  
The ribbon area takes up the top portion of the Microsoft Project user interface. Here, you will find icons, tabs, and access to the backstage.

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## Using the Ribbon

The ribbon contains all the actions (icons) you may need to perform within Microsoft Project.

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## Using the Backstage

The *backstage* is a full-screen area that allows you to open, save, share, and print your project.

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## Using Views and Tables

Access views and tables via the *view* tab and selecting icons located in the *task views* and *resource views* sections.

# The Microsoft Project Scheduling Engine

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## Constraint Based Scheduling

The scheduling engine calculates dates for you based on constraints you place on tasks and resources.

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## Critical Path and User-controlled Scheduling

Microsoft Project calculates the critical path by way of looking at how all tasks connect with their predecessor/successor relationships. User-controlled scheduling can effectively break the ability to identify the critical path because durations, start dates, and finish dates are not required when using this feature.

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## Configure Project Options

Microsoft Project offers many options for you to configure the user interface, scheduling engine, and task tracking for your project. Most of these options are located in the backstage using the *Options* menu item.

# Preparing a New Project

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## Create a New Project

Before you create a new project, make sure you have all the *project options* configured as you want them. Unless you have a unique reason to do otherwise, it is a good practice to start with a blank project.

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## Configure a Project Calendar

Learn the differences between the Microsoft Project calendars and when to use them. As a general rule, you should use the *standard* calendar.

# Estimating the Project

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## Add Tasks to the Project

Learn best practices for adding tasks to a project.

- 17 **Add Durations to Each Task**  
Learn to standardize the type of duration you add to tasks in days or weeks for ease of use.
- 18 **Add Predecessors to Each Task**  
To link tasks together, the best approach is to insert the *predecessor* column into the Gantt chart *entry* table, then link tasks from the top of the project to the bottom.
- 19 **Create the Critical Path**  
Utilize the network diagram to see how all the tasks link together and create a critical path.
- 20 **Add Resources to the Project**  
When you add resources to a project, you do so by using the *resource sheet* view. In this view, you can add named, generic, material, and many other types of resources.
- 21 **Create Resource Assignments**  
Learn to add resources to a task and identify how much time each resource will require for that task.
- 22 **Build a Work Breakdown Structure**  
Once you define the tasks and resource needs for your project, you should create a work breakdown structure -- or WBS. The WBS will make it easier for you to know when one set of activities finish and another begins.
- 23 **Add Costs to the Project**  
The best approach to adding these costs is to create *cost type* resources and assign them to tasks. Once you have a task that represents the cost for the project, you can assign the appropriate *cost resources* to the task and then enter the amount.
- 24 **Add Milestones to the Project**  
You add milestones to a project so you can track the completion of certain groups of tasks. Milestones are not required in a project but you will likely find them helpful when building reports or sharing the project with others.
- 25 **Add Lag and Review the Critical Path**  
When you are updating tasks in a project, you might want to make some light adjustments. You can use the *free slack* field to see how much time you have before the task becomes critical.
- 26 **Adjust Resource Allocations**  
Resource allocations display as a *red person* icon in the *indicators* column. This column displays in most Gantt chart views. In nearly any task-level view, you can insert the *indicators* column if you need to.

## Tracking the Project

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- 27 **Create a Baseline**  
Baselines store certain pieces of information related to your project so you can compare your original plan to the current plan.

## 28 Task Status Updates

Updating task status is an important process a project manager should follow. You will get updates from your team and update the project progress.

## 29 Resource Assignment Status Updates

When you update resource assignments, you are updating the time a person requires for the task or updating the costs for a task.

# Custom Views and Fields

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## 30 Create Custom Views and Tables

Views represent how the current window looks in Microsoft Project. The table defines the column of information you want to see.

## 31 Create Custom Fields

Microsoft Project provides many of the fields you need, but if you require your own, you can create them. You can even create formulas and graphical indicators.

## 32 Create Graphical Indicators

When you create a custom field, you can further enhance it to use graphical indicators. These indicators allow you to display things like red, yellow, and green flags.

# Project Reporting

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## 33 Working with the Timeline

The timeline provides a graphical visualization of your project. The timeline is excellent for reviewing the project's implementation plan from within PowerPoint or in emails.

## 34 Multiple Timelines in Project 2016, 2019 and Online

New to project 2016-2019 and Project Online is the ability to add multiple timelines to a single timeline view. Timelines are excellent for reviewing the project's implementation plan from within PowerPoint or in emails.

## 35 Working with the Reporting Module

The reporting module contains most of the capabilities you can use in Microsoft Excel.

## 36 About Agile Projects

Learn how to manage you project using agile techniques.

## 37 Using the Task Board

The task board allows you to manage projects using an agile approach, where you drag-and-drop tasks from one column to another. The columns allow you to set a status for a task, like defining what tasks are next up, in progress, done, and more.

## 38 Using Sprints

Using Project Online Desktop, you can define the sprints, add tasks to those sprints, and then use a board view to define the completion of the work.

- 39** Using Boards and the Gantt Chart  
Learn how tasks and boards are related, and how tasks appear on various kinds of boards including the Gantt Chart.
- 40** Sharing Boards  
Learn three ways to share the information in your project outside of Microsoft Project.

## Tips and Tricks

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- 41** Tips and Tricks for Copying Views  
When you create custom tables, reports, views, filters, and other custom items, you can copy these from one project to another. You can do this using the organizer.
- 42** Tips and Tricks for Replacing Resources  
When you have resources on a project, you may need to replace them at some point in time. Learn best practices to replace a resource.
- 43** Tips and Tricks for Printing  
You can print nearly anything in Microsoft Project, but you cannot print multiple items displayed on the screen.

## Conclusion

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- 44** Conclusion  
An overview of key takeaways from previous lessons in the course.

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