

Project Advanced

This course will take you into the more advanced levels of Microsoft Project. It covers a diverse range of topics including working simultaneously on multiple projects, sharing resources between several projects, downsizing very large projects, using templates, and automating operations with VBA.

Snapshot

Duration: 1 day

Version: 2010, 2013, 2016

Level: Experienced

Prerequisites: Successful completion of MCI MS Project Introduction course or equivalent knowledge and skills.

Learning Outcomes

- Create and work with several types of custom fields
- Create and work with WBS codes
- Create a custom view with a custom filter, group and table
- Run and modify standard graphical reports as well as create your own custom reports
- Create and work with visual reports
- Work with and create project templates
- Work with and link multiple projects in project
- Create shared resources for use amongst multiple projects
- Downsize large project files into more manageable entities
- Export project data to other applications
- Collaborate on projects with others using skype for business and SharePoint
- Create VBA macros to automate operations in a project file

Course Content

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

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

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

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

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
- Importing Data From Excel

Working Collaboratively

- Understanding Collaboration Options
- Adding a Contact as a Resource
- Working With a Contact Resource
- Syncing Tasks With SharePoint
- Working With a Synced Task List

Microsoft Project VBA

- Understanding Project VBA
- Accessing the Developer Tab
- Recording a Macro
- Running a Macro
- Editing a Macro
- Running an Edited Macro
- Localising a Macro
- Running a Localised Macro