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## **Microsoft® Project®**

Microsoft Project is a flexible software tool for project portfolio management and daily work. It gives users a powerful visually enhanced way to efficiently manage a wide range of projects and programs. From meeting important deadlines to choosing the right resources and empowering teams, Project delivers new as well as intuitive experiences to plan, manage, and collaborate with various individuals, teams and the enterprise. It is extremely intuitive and offers great balance of usability and complexity. Project is used in various industries including manufacturing, pharmaceuticals, construction, retail, financial services, government and healthcare. Project is designed to help users set realistic goals for project teams and customers by creating schedules, distributing resources and managing budgets.

**The modules for Project are as follows:**

- [Module 1 – Project Create and Format](#)
- [Module 2 – Resources, Costs and Tracking](#)
- [Module 3 – Master Projects, Reports, Formulas and Macros](#)

### **To Schedule / Need Additional Information**

To schedule sessions, receive more information or for questions/clarifications contact us at:

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**Phone:** (630) 495-0505 or (800) 869-7497.

**[To see a complete list of our current computer training options click here.](#)**

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## Module 1 – Project Create and Format

### Tasks:

- Start your project by adding tasks in a chronological hierarchy, with related tasks grouped using the phase method.
- Organize your tasks visually using summary tasks and outlining.
- Learn advantages of automatic versus manual task scheduling.
- Create summary tasks for easy viewing and subtotalling capabilities.
- Rearrange tasks and set individual and recurring tasks.
- Understand the differences between task duration, work or man-hours and units.
- Add task durations in a variety of formats.
- Add milestones to show key deadlines or to show when a section of tasks is complete.
- Override calculated task start and finish dates by changing and moving dates.
- Set task constraints to override calculated scheduling by the program.
- Sort, filter and group your tasks to view your data at different angles.
- Learn to import/export tasks from/to other programs.
- Navigate and zoom your project with keyboard and ribbon techniques and tools.
- Add notes and special descriptions that are viewed and printed.

### Task Costs:

- Learn how to enter cost values and review and manage project costs.
- Enter fixed costs (non-resource related) to tasks.

### Task Relationships:

- Establish relationships by linking tasks and setting the relationship between tasks.
- See how task relationships ensures accurate scheduling of tasks.
- Refine scheduling by applying lag time (gaps) and lead time (overlap), and splitting tasks into multiple segments.
- Understand how the completion of a project can be affected by critical and non-critical paths of the project's tasks.
- Learn how to correct scheduling issues by modifying task relationships.
- Use single and multiple timelines to see your project's best scheduling paths.
- Hide tasks to see how their absence would affect the over project.

### Project Calendars:

- Learn how to change your project's default work hours so that your tasks are scheduled according to your workday requirements.
- Create project calendars based specific working days and times.
- Create task calendars to schedule tasks outside the normal working day.
- Fine tune your project's calendar and calendars.
- Schedule your project to start on a certain date or schedule your project to end on a certain date.

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**Project Formatting:**

- Color-format tasks and associated Gantt bars to differentiate between critical and non-critical task paths.
- Change font, size, colors and gridlines for the many project views including Gantt chart, calendar, resource sheet and more.
- Set layout properties to change the thickness of Gantt bars, rounding of bars, the date format when displayed and choice between no link lines, curved and rounded link lines.
- Modify text alignment and text wrapping.
- Apply styles to quickly and consistently format these views.
- Draw and format a variety of geometric shapes including arrows, boxes, ovals, lines and text boxes.
- Link shapes to dates and tasks to move as they move.
- Use formatting to show task slack and task path relations.
- Turn off the display of shapes from the project.

**Customizing Features:**

- Add the work breakdown structure (WBS) outlining tool to create a numbering system alongside each task and summary task.
- Insert outline numbering as an easy alternative to WBS.
- Insert project summary task as the top-level summary row.
- Hide all summary tasks in the entire project.
- Learn to modify the timescale that sets how much is seen within the screen and the degree of detail displayed of the project.

**Project Printing:**

- Print entire project on default number of pages.
- Condense a multi-page project on less pages or on a single page.
- Print project based on a date range of the project.
- Use the page setup tools to change margins, insert page numbers, change the header/footer and print the legend key.
- Print a certain number of columns (fields) and add notes on the last page.

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## Module 2 – Resources, Costs and Tracking

### Resources and Resource Calendars:

- Understand the different types of resources used in projects, and how to set up their availability and costs.
- Know the differences between work resources, material resources and cost resources.
- Learn to set up a project's resource sheet with the 3-types of resources.
- See how to quickly categorize and group resources.
- Sort, filter and group your resources to view your data differently.
- Modify resource calendars to accommodate shift patterns and personal holidays affecting their work and costs.
- Change a resources calendar to accommodate for example longer workdays, working holidays and weekends.
- Learn to shorten the finish dates of tasks and overall project by assigning resources with these modified calendars who can work on tasks where others are unavailable during those times.

### Resource Assignments:

- Assign resources to tasks (and tasks to resources) directly in the Gantt chart task sheet.
- Assign resources using the assign resources window as well as the team planner tool.
- Filter the resource sheet to list only those resources who are available.
- Understand and know how to use effort-driven scheduling correctly.
- Set resources to work less than 100% on a given day.

### Resource Contour and Overallocation:

- Learn how to split view the screen to accommodate the contouring of hours a resource works per day.
- Use split view “resource usage” to contour the hours of all tasks (especially overlapping tasks) that a resource is assigned.
- Use split view “task usage” to contour the hours of all resources that are assigned to a single task.
- Learn how to resolve resource overallocation automatically using the resource leveling tool.

### Task and Project Costs:

- Learn how to use the program's tools to evaluate your schedule and resource loads to make sure you're bringing a project in on time and within budget.

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**Baseline and Tracking:**

- Set alarms and indicators to trigger when your projects finish date varies from plan.
- Understand the concepts of baselines, schedule and actual values.
- Use the baseline to set the budgets for each task throughout the project.
- Learn how to track the progress of your project in real-time.
- Use special tracking tools to update “% complete” for individual tasks and task groups.
- Update tasks with “% complete”, “on-schedule” “late start”.
- Set screen views to compare/measure actual costs with budget values.
- View anytime as to whether the project is over/under budget, ahead/behind schedule.
- Report on your project status using and customizing fields, tables and table views.
- Easily identify your biggest cost problems.
- Use formatting to compare baseline vs actual, task schedule slippage and late tasks.

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## Module 3 – Master Projects, Reports, Formulas and Macros

### Shared Resources:

- Understand the ramifications that arise when the same resources are being used across several projects.
- See how it centralizes resource information, such as the resource name, calendar used, resource units and cost rate tables.
- Learn the tools available that combine all the resource information into a single central file called the resource pool.
- See how this file is used in identifying assignment conflicts and viewing time allocation for each project.
- Learn how to create a resource pool that can be used for all projects using some or all of the same resources.
- Learn how to set up a project to use a resource pool in place of its own resource sheet.
- Assign resource pool resources to tasks using a special filter that will list only those resources that are not being used during the same timeframe by other project file tasks.
- Learn how if a resource is already being used, how that resource can still be used in on those days where there is no overlap or conflict.
- Understand how to troubleshoot situations where erroneous conflicts arise and the best ways to fix them.
- Learn to remove a project from the pool, while keeping the resource assignments in place.

### Master Projects and Condensed Projects:

- Understand how a simple project can get out of hand very quickly.
- Spot situations where a project can end up becoming a collage of smaller projects.
- Learn how to create multiple smaller project files and then link them to a single project file to show where they fit in your master project.
- Create a master project file void of tasks and other properties.
- Insert the first project file that is to be included.
- Insert additional project files one after another.
- Optionally set each inserted project to link to a resource pool file for its resources and for better resource usage management as stated in previous section.
- Optionally set relationships between tasks within each project group, then optionally link tasks of one project file with another.
- Save the master project file as well as the individual project files.
- Learn how to remove project files from the master project file.

### Project Reports:

- Understand how reports are a great way of measuring performance and conveying the big and little pictures of your project.
- Learn how the graphic nature of reports can produce striking information using a variety of traditional, Excel-driven and Visio diagram reports.
- Understand the advantage reports that automatically update as the project data is added and updated.
- Create a variety of Project based reports including “dashboard”, “resource”, “Cost”, and “Progress”.
- Create additional reports using a wide array of base-templates.
- In addition, pick from powerful customizable report templates called “visual reports” that are automatically created and displayed in Microsoft Excel and Microsoft Visio that use PivotChart and OLAP cube processes.

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**Formulas and Indicators:**

- Learn how you can add formulas and function formulas to your project file that create new fields, indicators and alarms, called calculated fields.
- Create fields based on the hundreds of fields already contained in the program.
- Create fields based on built-in fields already contained in the program as well as ones created by you.
- Create fields using the many function formulas contained in the program.
- Learn to customize existing fields ranging in many data types including cost fields, date fields, duration fields, start fields, finish fields, flag fields, number fields, text fields and even WBS fields.
- Create formulas that mimic conditional formatting that formats text and Gantt bars a certain way.
- Create formulas that insert iconic indicators and alarms when certain conditions have been met.

**Macro Automation:**

- Understand how macros can be used to run a series repetitive tasks that have to be performed over and over.
- Learn how macros can significantly reduce the amount of time spent on performing menial tasks to improve one's productivity.
- Learn how to easily create macros by using the program's macro recorder.
- Set your macros to run from the keyboard, quick access toolbar or from a personalized tab ribbon.
- See how to edit your macros.
- Create new macros by inserting readily-available VBA code packets, that can add new features and capabilities to the program.