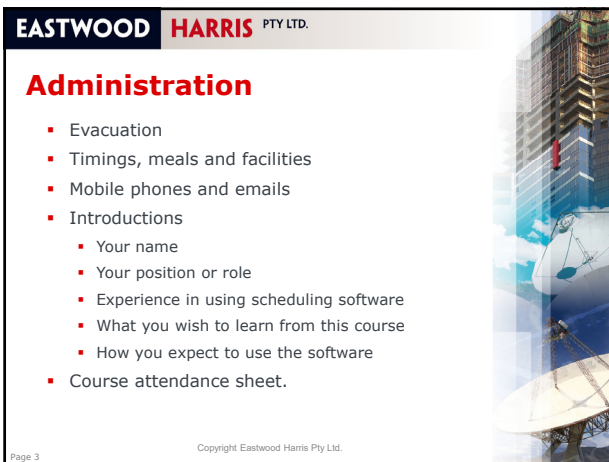


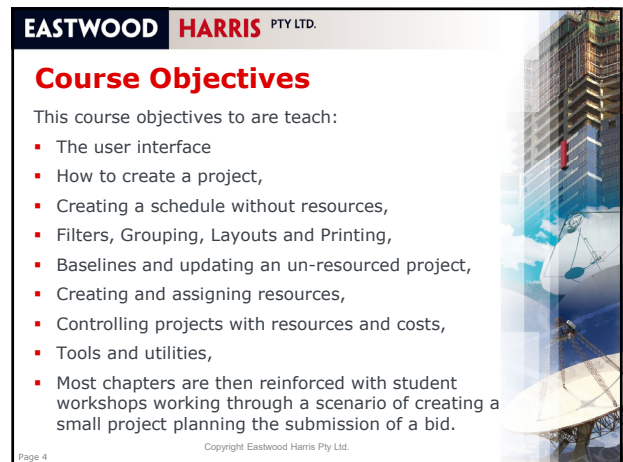
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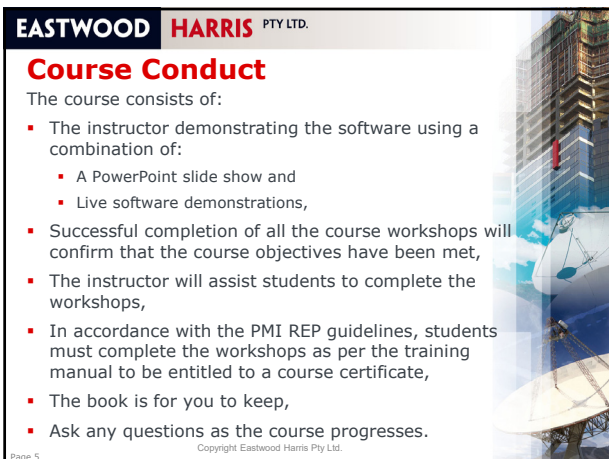
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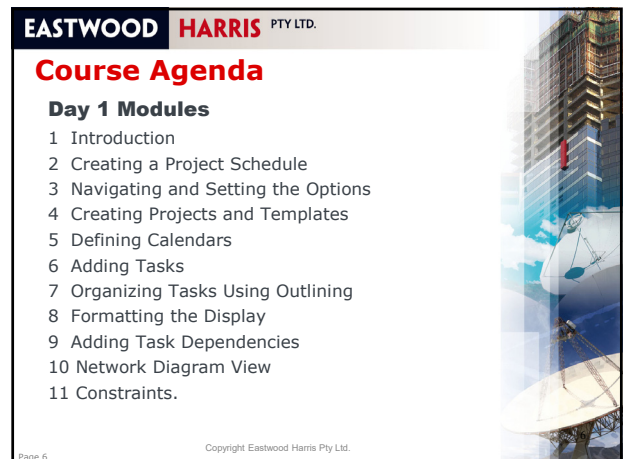
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6


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Course Agenda

Day 2 Modules

- 12 Filters
- 13 Tables and Grouping Tasks
- 14 Views and Details
- 15 Printing and Reports
- 16 Tracking Progress
- 17 Creating Resources and Costs
- 18 Assigning Resources and Costs to Tasks
- 19 Resource Optimization
- 20 Updating Projects with Resources.

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Module 1 – Introduction

Topics:

- Purpose of the course
- Required Background Knowledge
- Purpose of Planning
- Project Planning Metrics
- Planning Cycle
- Levels of Planning
- Monitoring and Controlling a Project.

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1.1 - Purpose of the course

- Provide a method for planning, scheduling and controlling projects,
- Using Microsoft Project 365, Microsoft Office Project Professional 2013, 2016 or 2019 or Microsoft Office Project Standard 2013, 2016 or 2019,
- In a single project environment,
- Up to an intermediate level.

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1.2 - Required Background Knowledge

- The ability to use a personal computer and understand the fundamentals of the operating system,
- Experience using application software such as Microsoft Office, and
- An understanding of how projects are managed, such as the processes that take place over the lifetime of a project.

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1.3 - Purpose of Planning

- The ultimate purpose of planning is to build a model that allows you to predict which activities and resources are critical to the timely completion of the project,
- Strategies may then be implemented to ensure that these activities and resources are managed properly, thus ensuring that the project will be delivered both **On Time** and **Within Budget**.

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Planning a project aims to:

- Identify the total scope,
- Plan to deliver the scope,
- Evaluate different project delivery methods,
- Identify the deliverables under a logical breakdown of the project,
- Identify and optimize the use of resources,
- Evaluate if target dates may be met,
- Identify risks and plan to minimize them,
- Provide a baseline plan,
- Assist in stakeholders' communication,
- Assist management to think ahead and make informed decisions.

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3.12 - Workshop 1 – Navigation and Setting Your Project Options

In this workshop you will:

- Practice navigating around the screen,
- Set the options to allow durations to be entered in days,
- Ensure that a useful date format is displayed and
- Ensure other options are set so the software operates in a simpler mode than the standard defaults.

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Module 4 - Creating Projects and Templates

Topics:

- Starting Microsoft Project
- Creating a Blank Project
- Opening an Existing Project
- Re-opening a Project
- Creating a Project Template
- Creating a New Project from a Template
- Saving Additional Project Information
- Using the Alt Key and Keystrokes to Access Commands
- Saving a Project
- Closing Microsoft Project

Page 68 Workshop 2 - Creating a Project.

68

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4.1 - Starting Microsoft Project

- When opening Microsoft Project, you may be presented with a blank project, named **Project1**, depending on your options
- This project will use the **Options** that you have set on your machine, using **File, Options, All New Projects** settings,
- This project is created using the **Global.mpt** template on your computer,
- You may start working with immediately.

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4.2 - Creating a Blank Project

- A blank project may be created from the **New Project** pane, which is displayed by:
 - Selecting **File, New** and
 - Clicking on **Blank Project** icon,
 - Also keying in **Ctrl+N** will create a new project,
- A new project will be displayed and the project name is shown at the top center of the screen,
- At this point the **Project Start date** is normally set in the **Project Information** form,
- Other dates in the **Project Information** form are:
 - Current Date:** – This field defaults to **today's date**,
 - Status Date:** – This is an optional field used when updating a project,
 - Calendar:** – This is the project **Base** calendar that is used to calculate the durations of all tasks.

Page 70

70

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Understanding the Global.mpt

- The **Global.mpt** is a template that resides on your machine,
- The **Global.mpt** contents such as filters and calendars may be edited using the **Organizer** command,
- The **"All New Project" Options** set **File, Options** are editing the **Global.mpt**,
- The **Global.mpt** options are **ONLY** adopted by a project created using the **File, New** command and selecting a **Blank Project**,
- When a project is created using a **template** or **copying** another project then the new project does not adopt **Options** set **File, Options**. These project copy the options that reside in the template or project.

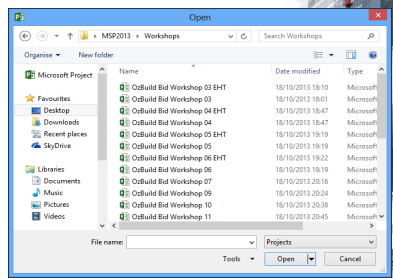
Page 71

71

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4.3 - Opening an Existing Project

- To open an existing project you should display the **Open** form by selecting:
 - File, Open**, or
 - Typing **Ctrl+O**,
 - Using the **Find File** Button.



Page 72

72

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8.8 - Format Colors

Colors are formatted in a number of forms and there is no single form for formatting all colors:

- **Nonworking time** colors in the Gantt Chart are formatted in the **Timescale** form,
- **Text** colors are formatted in the **Text Styles** and **Font** forms,
- **Gridline** colors are formatted in the **Gridlines** form,
- **Hyperlink** colors are formatted under **File, Options, Advanced, Display options for this project**;
- **Timescale** colors are with the **File, Options, General** tab, but this is always printed in white,
- The **Logic Lines**, also known as **Dependencies, Relationships, or Links**, inherit their color from the predecessor's bar color in the Gantt Chart view and may be formatted in the Network Diagram view by selecting **Format, Format** group, **Layout**.

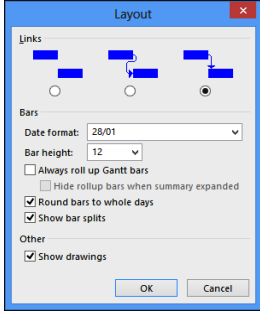
Page 127

127

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8.9 - Format Relationships

- The Links, also known as Dependencies, Relationships, or Logic Lines, may be displayed or hidden by using the **Layout** form,
- Select **Format, Format** group, **Layout** to open the **Layout** form and click on one of the three radio buttons under **Links** to select the style you require:



Page 128

128

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Module 8 – Formatting the Display - Summary

Topics:

- Formatting the Columns
- Formatting Time Units
- Formatting the Bars
- Row Height
- Format Fonts
- Format Timescale
- Format Gridlines
- Format Colors
- Format Links, Dependencies, Relationships, or Logic Lines
- Workshop 6 - Formatting the Bar Chart.

Page 129

129

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8.10 Workshop 6 - Formatting the Bar Chart

- Management has received your draft report and requests some changes to the presentation.

Page 130

130

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Module 9 – Adding Task Dependencies

Topics:

- Understanding Dependencies
- Understanding Lags and Leads
- Restrictions on Summary Task Dependencies
- Assigning Task Dependencies
- Scheduling the Project
- Workshop 7- Adding the Relationships.

Page 131

131

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9.1 Understanding Dependencies

- The next phase of a schedule is to add logic to the tasks
- There are two types of logic:
 - Dependencies (Relationships or Logic or Links between tasks), and
 - Imposed Constraints to task start or finish dates. These are covered in the Constraints chapter,
- Microsoft Project's Help file and other text uses the terms "**Dependencies, Relationships and Links**" for Dependencies but does not use the term "**Logic.**"

Page 132

132

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14.1 Understanding Views

- A **View** is a function where the formatting such as **Grouping, Table, Filter, Print Settings** and **Bar** formatting are saved as a **View** and reapplied later,
- In a project a **View** could be created for each type of report, say for displaying tasks by Contract Package or by Phase,
- It is highly recommended that a **View** be produced for each frequently-created report,
- A **View** is based on one of **16 Screens** when it is created,
- The **Screen** may not be changed after the **View** is created.

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14.2 Creating a New View

- A new View may be created by copying and editing an existing View, or creating a new View,
- There are two types of Views:
 - Single View**, and
 - Combination View** which specifies which View is displayed in the Top Pane and View is displayed Bottom Pane.
- The instructor will demonstrate how to create a new view.

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14.3 Details Form

- Details** forms are the third level of formatting that may be assigned **Bottom Pane** in some views,
- Each **Details** view has a number of options, which tends to make this aspect of Microsoft Project difficult for all levels of users,
- The **Details** forms may be selected in the bottom pane by right-clicking in the active pane to open a menu,
- The instructor will demonstrate examples of Details forms.

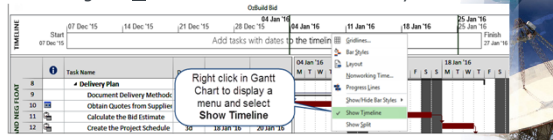
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14.4 Timeline View

- The Timeline view allows you to clearly understand how much of the Gantt Chart is displayed on the screen,
- The **Timescale** view is shown above the Gantt Chart by selecting **View, Split View** group and checking the **Timeline** check box,
- A task may be added to the **Timeline** view by selecting the **Add to Timeline** found in many menus.



Page 190

190

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Timeline View in Microsoft Project 2016

Microsoft Project 2016 introduced the ability to:

- Add multiple Timelines,
- Change the Start and Finish date of the Timeline and
- Format the Colors of each individual Timeline,

The instructor will demonstrate.

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14.5 A Logical Process for Developing a View

The following process is suggested for creating a new View:

- Collect the View requirements,
- Plan the naming/coding system to be used if there are a number of views to be created,
- Create any Custom fields required,
- Create the Table, Filter and Grouping to be used with the View,
- Create the View and assign the Table, Filter and Grouping,
- Create the print headers and page setup,
- Format the Timescale, Gridlines, Bars,
- Apply any special sorting or font formatting,
- Save the file,
- Copy the View to create all new Views with the Print settings and Gantt Chart formatting set as a standard in the first View.

Page 192

192

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20.5 Updating Dates and Percentage Complete

- The schedule should be first updated as outlined in the **Tracking progress** module,
- In summary, this is completed by entering:
 - Complete** tasks require the **Actual Start** and **Actual Finish** dates,
 - In-Progress** tasks require the **Actual Start**, **Actual Duration**, **Remaining Duration** or **Expected Finish**,
 - Un-started** tasks may require adjusted logic or **Durations**.

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20.6 Updating Resources

- There are many permutations available in the **File, Options** form for calculating resource data,
- Due to the number of resource options and numerous forms available in Microsoft Project, it is not feasible to document or teach all the combinations available,
- One or more resources may be **applied** to a task and you may want to enter both the **Actual Work** and the **Remaining Work** independently,
 - In this situation you will need to unlink **% Complete** and **Actual Work** with the **Updating task status updates resource status** option in the **File, Options, Schedule** tab,
 - Now the **% Work** field will be linked to the **Work, Actual Work** and **Remaining Work** fields and will now operate independently of the **% Complete** field.

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Updating Resources (continued)

- You may want to enter both the **Actual Work** and **Actual Costs** separately,
- This process is very time consuming and requires significant organizational commitment to succeed,
- In this situation you will need in the **File, Options, Schedule** tab to:
 - Unlink **% Complete** and **Actual Work** with the **Updating task status updates resource status**,
 - Unlink the **Actual Work** and **Actual Costs** by disabling the **Actual costs are always calculated by Project** option, and
 - To ensure the **Actual Costs** are spread to the **Status Date** you should also check **Edits to total actual costs will be spread to the status date**. This option ensures **Actual Costs** are in the past and **Remaining Costs** are in the future.

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Additional Updating Functions

Microsoft Project has two functions that may assist in updating a project:

- Update work as completed through:** (date)
 - When a project is updated using the **Update Project** form the project is updated as if it were progressing exactly according to plan and the **Status Date** is set to the same date as **Project Update Date** at 17:00hrs, and
- Reschedule uncompleted work to start after:** date
 - This function is used to move the **Incomplete Work of In-Progress** tasks into the future,
 - In-Progress** tasks must be able to **Split** for this function to operate. The option to split tasks is found on the **File, Options, Schedule** tab,
 - The **Status Date** is **NOT** set to the **Reschedule uncompleted work to start after:** date when this function is used.

Page 274

274

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20.7 Splitting Tasks

When the **Split in-progress tasks** option is enabled, a task may be **Split** by:

- Dragging the incomplete portion of a task in the bar chart, or
- Clicking on the button and then moving your cursor over the point on the task bar where you want a split and dragging the task, or
- Using the **Project, Status** group, **Update Project, Reschedule uncompleted work to start after:** function, or
- Commencing a task before its predecessor finishes,
- In the picture below the upper task was split using the **Split** button and the lower task was split because it commenced before its predecessor.

Page 275

275

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20.8 Summary Tasks and Earned Value

- Actual Costs** and **Work** may be summarized at any level in the same way as **Work** and **Costs**,
- The picture below is showing the **Earned Value** table and the costs have been summarized up to the Project Level,
- Note:** Check the way Microsoft Project calculates the **Bid for Facility Extension** task **VAC**:

Task Name	Planned Value - PV (BCWS)	Earned Value - EV (BCWP)	AC (ACWP)	SV	CV	EAC	BAC	VAC
1 Bid for Facility Extension	\$7,440.00	\$7,908.00	\$8,040.00	\$468.00	-\$132.00	\$55,979.16	\$55,060.00	-\$919.16
2 Technical Specification	\$7,440.00	\$7,908.00	\$8,040.00	\$468.00	-\$132.00	\$20,130.53	\$19,800.00	-\$330.53
3 Approval to Bid	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00
4 Determine Installat	\$6,720.00	\$6,720.00	\$5,040.00	\$0.00	\$1,680.00	\$5,040.00	\$6,720.00	\$1,680.00
5 Create Technical Sp	\$720.00	\$1,188.00	\$3,000.00	\$468.00	-\$1,812.00	\$21,717.17	\$8,600.00	-\$13,117.17
6 Identify Supplier Cc	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$1,120.00	\$1,120.00	\$0.00
7 Validate Technical t	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$3,360.00	\$3,360.00	\$0.00
8 Delivery Plan	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$21,520.00	\$21,520.00	\$0.00
14 Bid Document	\$0.00	\$0.00	\$0.00	\$0.00	\$0.00	\$13,740.00	\$13,740.00	\$0.00

Page 276

276

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Summary Tasks and Earned Value (continued)

- The method that Microsoft Project uses to calculate the Earned Value data is documented in the Help file and should be read carefully, as different versions of Microsoft calculate these fields differently,
- Should different Earned Value calculations be required then Custom Data Fields should be considered as an alternative.

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Module 20 – Updating Projects with Resources - Summary

Topics:

- Understanding Baseline Dates, Duration, Costs and Hours
- Understanding the Status Date
- Formatting the Status Date
- Information Required to Update a Resourced Schedule
- Updating Dates and Percentage Complete
- Updating Resources
- Additional Updating Functions
- Splitting Tasks
- Summary Tasks and Earned Value
- Workshop 18 - Updating a Resourced Schedule.

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20.9 Workshop 18 - Updating a Resourced Schedule

- We need to update the tasks and resources,
- The instructor will demonstrate this workshop first.

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Review Expectations

- Complete Feedback Sheet and
- Have we met your expectations?

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Thank you for attending

Page 281

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