



YJTJ™ Education Series

**Project Portfolio Management
using
Microsoft Project
and
Microsoft Project Server**

Open Enrollment Class

Course Information and Outline



Gold Project and Portfolio Management

Course Duration: 3 Days

Course Overview

This course is a hands-on class that integrates the use of Microsoft Project Professional, Microsoft Project Web App, and Project Server. The course provides students with a detailed understanding of the core foundation of Microsoft Project based on globally accepted principles for project management and proven Microsoft Project best practices. Students will learn best practices for initiating, planning, executing, monitoring and controlling, and closing projects by assuming the roles of Project Manager and Project Team Member throughout the course.

The course is paired with the “Managing Non-Project Work” module prepared by Milestone to give a more complete view of the Project Portfolio Management suite of tools. The Milestone course is designed for all levels of Microsoft Project experience. Prospective students should have good computer skills and a basic understanding of project management. Previous exposure to the Microsoft Project desktop tool is beneficial.

Learning Objectives

- To discuss the core foundation of Microsoft Project, and to describe skills to build upon that foundation
- To use Microsoft Project in applicable phases of a normal project life cycle
- To use Project Web App for initiating, tracking, updating, analysis, and reporting
- To discuss basic principles of project management

Business Outcomes

- Manage projects more efficiently by correctly using Microsoft Project and Project Web App
- Increase organizational project management maturity through proven project management and Microsoft Project best practices
- Improve the return on investment made in Microsoft Project and Project Web App by the organization

Course Structure

This course is designed to maximize the educational experience through a structured learning process. Each lesson will begin with a group discussion regarding the topic at hand, followed by an instructor demonstration of Microsoft Project and/or Project Web App where necessary. At specific points throughout the course, students will complete hands-on exercises to reinforce lesson objectives. Some of the hands-on exercises will be worked with the instructor, while others will be completed independently. Some of the exercises only provide broad directions, although the complete step by step solutions are provided in an appendix.

Target Audience

This course is designed for anyone who uses Project Professional and Project Server (on-prem or Project Online) to assist in managing projects.

Prerequisites

Students taking this class should have the following background:

- Basic computer and software skills, in particular familiarity with Microsoft Windows and Microsoft Office applications.
- Exposure to project management is helpful, but not required.

Course Outline

Lesson 1: Getting Started

- Project Management Definitions
- Logging on to Microsoft Project
- Fluent User Interface (UI)
- Microsoft Project Data Model
- Microsoft Project Views, Tables, Filters, and Groups

Lesson 2: YJTJ (Your Job Tool's Job)™

- YJTJ Process and Microsoft Project
- YJTJ – Auto Schedule Mode
 - Project Initiation: Project Start or Finish Date
 - Project Task Planning: Task Dependencies
 - Project Task Planning: Task Constraints
 - Project Assignment Planning: Creating Assignments
 - Project Execution: Entering Actual Work
 - Project Execution: Remaining Work in Past Time Periods
 - Project Execution: Percent Complete
 - Monitoring and Controlling: Rescheduling
 - Project Closure: Closing Open Tasks

Lesson 3: Project Initiation

- Project Initiation in Project Web App (PWA)
- Enterprise Project Types
- Enterprise Project Information

Lesson 4: Task Planning

- Task Planning Step 1: Work Breakdown Structure
 - Creating Tasks
 - Task Information
 - Inactive Tasks
- Task Planning Step 2: Activity Sequencing
 - Task Dependency Types
 - Lag Time
 - Lead Time
- Task Planning Step 3: Date Management
 - Date Management
 - Flexible, Semi-Flexible, and Inflexible Constraints
 - Deadlines

Lesson 5: Resource Planning

- Defining Project Resources
- Building the Project Team
- Basic and Custom Resource Information
- Resource Overallocation
 - Leveling Sensitivity
 - Interactive Scheduling and Leveling
- Resource Availability
 - Resource Availability Views
 - Booking Type

Lesson 6: Assignment Planning

- Task and Resource Assignments
- Locations for Creating Assignments
- Microsoft Project Scheduling Engine
 - Units, Peak, Work, and Duration
 - Task Types
 - Effort Driven
- Estimated Duration

Lesson 7: Project Baselines

- Baseline Definition
- Working with Baselines
 - Baseline Positions
 - Setting Baselines

Lesson 8: Project Execution

- Project Execution
- PWA Team Member Tracking
- Updating the Microsoft Project Schedule

Lesson 9: Variance Analysis

- Variance Defined
 - Types of Variance (Schedule, Work, and Cost)
 - Actual and Anticipated Variance
- Locating Variance in Microsoft Project

Lesson 10: Project Communication

- Project Communication Defined
- Project Center
- Microsoft Project Reporting
 - Timeline
 - Standard Reports
 - Visual Reports

Lesson 11: Plan Revision

- Scope Management Defined
- Plan Revision Alternatives
- Introduction to Critical Path

Lesson 12: Project Closure

- Project Closure Defined
- Closing the Microsoft Project Plan

Managing Non-Project Work

Course Overview

This course is a hands-on class that integrates the use of Microsoft Project Professional, Microsoft Project Web App, and Project Server. Microsoft Project is primarily designed for project work. Nevertheless, work other than project work can be managed using the PPM toolset. Indeed, it is important to include all work, both project work and non-project work, in a total resource allocation picture. The “Managing Non-Project Work” module is a hands-on class that provides best practices for managing work activities that are not true projects but are part of the overall work for a resource. Project Managers learn about the different types of non-project work and how best to build, staff, and managing this work in the PPM environment.

Learning Objectives

- Demonstrate how to build a Time Collection Work Plan in PWA, how to staff it, and how to accept actuals
- Demonstrate how to build and manage a Level of Effort Work Plan

Business Outcomes

- Manage work more efficiently by correctly using Microsoft Project and Project Web App
- Increase organizational project management maturity through proven project management and Microsoft Project best practices
- Improve the return on investment made in Microsoft Project and Project Web App by the organization

Course Structure

This module will begin with a group discussion regarding the topic at hand, followed by an instructor demonstration of Microsoft Project and/or Project Web App where necessary. Following the discussion, students will complete hands-on exercises to reinforce lesson objectives. Some of the hands-on exercises will be worked with the instructor, while others will be completed independently. Some of the exercises only provide broad directions, although the complete step by step solutions are provided in an appendix

Target Audience

This course is designed for anyone who uses Project Professional and Project Server (on-prem or Project Online) to assist in managing work.

Prerequisites

Students taking this class should have the following background:

- Basic computer and software skills, in particular familiarity with Microsoft Windows and Microsoft Office applications.
- Exposure to project management is helpful, but not required.
- Have successfully completed Milestone’s PPM course.

Course Outline

Managing Non-Project Work

- Introduction
- Managing Time Collection Work Plans
 - Initiate the Work Plan
 - Add Tasks to the Work Plan
 - Add Resources to the Work Plan
 - Create Resource Engagements
 - Add Resources to the Time Collection Work Plan
 - Assigning Resources to Tasks
- Project Execution
 - Automated Rules
- Plan Revision
 - New Tasks
 - Completed Tasks
 - Change in Allocation
 - New Team Members
 - Team Members Leave the Team
- Work Plan Closure
- Level of Effort Work Plans
 - Creating and Managing an LOE Work Plan
 - Revising and Closing an LOE Work Plan