



## **YJTJ™ Education Series**

# **Resource Manager using Microsoft Project and Microsoft Project Server**

## **Course Information and Outline**



Gold Project and Portfolio Management

## Course Duration: 2 Hours

### Course Overview

In many matrixed organizations, the Resource Manager has few tools available to manage the department's resources. The Microsoft PPM suite of tools provides that ability and gives the Resource Manager numerous tools with which to manage the department's capacity to do work and balance against the organization's resource demands. This seminar style course acquaints the resource manager with a variety of tools to be used to facilitate managing resources.

### Learning Objectives

- Discuss the concepts of resource management
- Describe the Microsoft PPM suite of tools and how they can facilitate managing resources
- Manage the team's capacity to do work and balance that capacity with the organization's requirements

### Business Outcomes

- Improve resource management
- Balance resource capacity and demand

### 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.

### Target Audience

This course is designed for anyone who uses Project Professional and Project Server (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: Introduction to Resource Management

- Organization Types
- Demand
- Capacity
- Managing Resource Engagements

### Lesson 2: Microsoft Project PPM Overview

- Microsoft PPM Tools
  - Microsoft Project Professional
  - Microsoft Project Web App
- Definitions
- Navigating PWA
  - Logging On
  - Project Center
- Resource Center

### Lesson 3: Capacity and Demand

- Capacity
  - Calendar
  - Resource Availability
  - Calendar Exceptions
- Demand
  - Booking Type
  - Committed
  - Proposed
- Project Assignments in Project Professional
- Project Assignments in PWA
- Resource Engagements
- Create a Support Project

### Lesson 4: Analyzing Commitments

- Resource Center
- Resource Availability
- Resource Assignments
- Generic Resources

### Lesson 5: Tracking and Revising

- Tracking
- Approving Timesheets and Time-Off Requests
- Revising Allocations