

## TRAINING COURSE OVERVIEW

This in-depth, hands-on, instructor-led course provides the Project Manager, Planner, or Scheduler with the advanced skills needed to more effectively create and manage projects using Microsoft Project while following a leading practice scheduling process.

Each student will follow the instructor and complete hands-on exercises on their personal laptop or computer workstation that is pre-loaded with the Microsoft Office application suite and Microsoft Project. Each student will create and manage projects with Microsoft Project and follow the same steps that they would follow if they were creating and managing live projects.

**Course Number:** EPMA-200

**Course Duration:** Two (2) days

**Student Roles:** Project and Program Managers, Project and Program Planners, Project and Program Schedulers

**Course Prerequisites:** Prior knowledge of Project Management and Microsoft Project is helpful; attending our *Managing Projects with Microsoft Project, Essentials* course (EPMA-100) is highly recommended.

**Course Pricing:** Please contact EPMA at [training@epmainc.com](mailto:training@epmainc.com) or 888.444.EPMA for individual or group pricing.

## TRAINING COURSE TOPICS

### Microsoft Project Review

Review Microsoft Project's main features and terminology; review how Microsoft Project facilitates the management of a project; review how Microsoft Project is used as part of a recommended project scheduling process.

### Using and Customizing the Microsoft Project Interface

Review the Microsoft Project interface; review the Quick Access Tool-bar and the Ribbon interface; learn how to configure the Quick Access Tool-bar and the Ribbon interface.

### Using and Customizing Views, Tables, Filters, and Groups

Review the project data and meta data model; review how to view and manipulate task, resource, and assignment data in a project using Views, Tables, Filters, and Groups; learn how to create custom Tables, Filters, Groups, and Views; learn how to share custom Tables, Filters, Groups, and Views using the Organizer and the Global.mpt file.

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## Creating Custom Data Fields

Review the various types of data fields built into Microsoft Project as well as how to expose them through the interface; learn how to create custom task and resource data fields to store free text data, structured data with lookup tables and outline codes, and calculated data using formulas; learn how to attach Graphical Indicators to a custom field to visualize the data.

## Using and Customizing Working Calendars

Review the ways that calendars can be used in a project schedule; learn how to create a custom working calendar and modify the work week, the daily working hours, and non-working time such as company holidays or shutdowns; learn how calendars are related to the default working times for a project; learn how working calendars can be used to format views in Microsoft Project.

## Planning and Tracking Project Costs

Review the ways that various types of resources contribute to the costs of a project; learn how to configure resource costs and plan for those costs in a project; learn how to create, configure, and use cost resources to plan and track fixed costs for a project; learn how to configure a Cost Breakdown Structure for a project.

## Using Resource Pools, Programs, and Project Dependencies

Learn how to create a shared resource pool file to store and manage a common set of resources used on multiple projects; learn how to staff a project using resources in a shared resource pool; learn how to use the shared resource pool file to view overall resource workloads and capacities; learn how to create a master project to consolidate projects into a single program or portfolio view; learn how to use a master project to easily establish cross-project dependencies.

## Tracking Project Performance

Review how to use project baselines; review the various types of variances in a project and learn how to identify and analyze them for project performance; review Earned Value Analysis principles and the prerequisites in a project to perform EVA; review the built-in EVA fields and learn how to use them to measure project performance.

## Importing, Exporting, and Sharing Project Data

Review how to copy and paste data between Microsoft Project and other Microsoft Office programs such as Microsoft Word and Microsoft Excel; review how to convert a project schedule into PDF; learn how to export data from a Microsoft Project schedule to various formats such as Microsoft Excel or XML; learn how to import data into a Microsoft Project schedule from various formats such as Excel or XML.

## Project Closure

Learn how to cancel unnecessary tasks in a project schedule; learn how to prepare a completed project schedule to be saved as a template for future projects; learn how to save a project schedule as a template.

## TRAINING COURSE INSTRUCTORS

EPMA instructors are certified in Microsoft Project and Microsoft Project Server, and have several years of practical hands-on experience deploying multiple versions of Microsoft Project, Microsoft Project Server, and Project Online in organizations of varying types and sizes. This breadth and depth of experience allows them to teach the mechanics of the tools, as well as share many practical tips, best practices, and pitfalls to avoid.

## TRAINING COURSE LOCATIONS

### EPMA Training and Solution Center

When delivered as a public, open enrollment training course, there typically are students from various companies and industries in the same class. Because of this diversity, class discussions often include a wide variety of comments, questions, and student experiences to supplement the standard material covered in the course.

EPMA's state-of-the-art training and solution center, located in Houston, Texas, accommodates up to 26 concurrent attendees and is populated with an elaborate array of technology.

The training and solution center is located at 4615 Southwest Freeway, suite 200 in Houston, Texas and is conveniently located minutes away from a wide variety of hotels, dining, shopping, and entertainment. The facility is located 15 minutes from downtown Houston, and it is accessible by air through two Houston-area airports.

### Live Virtual

When delivered as a live virtual training course, students may attend from their office or home over the Internet, but have many of the same benefits as attending in-person. This combines the quality of live, hands-on learning with the flexibility and convenience of remote attendance.

### On Site

When delivered as an on-site training course, students may choose to have organization-specific discussions around how they should use the tool from a functional and process perspective (time permitting).

After coordinating on-site training schedules and logistics, an EPMA instructor travels to the training facility of your choice to deliver the training course for your personnel. Students are expected to supply their own computer equipment and Internet connectivity as necessary.

**Please contact EPMA at [training@epmainc.com](mailto:training@epmainc.com) or 888.444.EPMA for more details, as well as pricing for individuals or groups.**

# Managing Projects with Microsoft Project, Advanced



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