

PROJECT MANAGEMENT LIFE CYCLE

Part I: The Project Management Life Cycle

Part II: Creating and Managing Projects Using MS-Project Professional, Project Server and Project Web Access

Course Length: 4 days

(Includes PMI Project Life Cycle, Microsoft Project Professional, Project Server collaboration and Project Web Access training)

Course Description

Today's project managers and teams must deliver under great pressure. Organizing scarce resources, managing tight budgets and deadlines, controlling changes throughout projects and generating maximum team performance are key aspects of effective Project Management.

The focal point of this workshop is to enhance the Project Manager's project planning and management skills to ensure successful completion of small and large projects on time, within budget, within scope.

Focusing on "best practices" as outlined by the Project Management Institute (PMI) PMBOK, you will learn how to successfully plan, manage and deliver projects.

Projects are typically divided into several project phases to improve management control. The phases are referred to as the project life cycle. The PMI Project life cycle has five phases, which vary in the customized life cycle versions that different organizations may adopt. During the initial phase, the project's general scope and timing are determined. During the intermediate phases, detailed planning occurs along with the activities required to produce the product or service of the project. In the final phase, project-closing activities occur. Each phase has certain requirements that must be met before the team can move onto the next phase. Each phase has output or documentation requirements.

Particular emphasis is given to the documentation components required as output within each phase of the Project Life Cycle. The Microsoft Project product is integrated into the workshop demonstrating how MS-Project can be an effective tool in planning and managing a project.

Sample reports are reviewed with participants, and appropriate exercises help reinforce the required content of each report. Additional documentation examples are provided by the instructor.

The instructor will provide various MS-Project templates the participants can use for documentation when they return to their offices.

This workshop offers you a standards-based, practical approach to successful project management across application areas and industries.

Completing projects successfully requires collaborative communication between all team members. A Microsoft Enterprise Project Management solution provides a framework for electronically creating and managing projects within an organization.

This course is designed for individuals who will use Microsoft Office Project Professional as a tool to assist them in managing projects. The topics in this course cover the critical skills necessary to create and modify a project plan that contains tasks, resources, baseline information and resource assignments.

This four-day instructor-led course provides students with the knowledge and skills to build, maintain, and control well-formed project plans using Microsoft Office Project Professional, Microsoft Project Server and Project Web Access.

After using your project management skills to create a complete project plan, this course will build upon that knowledge, and give you the opportunity to work with a project plan once it has entered the project implementation phase. You'll be able to enter actual project work, create reports and make changes to the project plan.

In this course, you will use Microsoft Project Web Access to view and access project information located on the server, as well as to report progress on assigned project tasks.

Participants will learn how to collaborate with the Microsoft Project Server through Microsoft Project Professional and through Project Web Access. This will enable project team members to collaborate with their project managers through time sheets and other components built into Project Web Access.

Course Objective: You will create a project plan file containing tasks, organize these tasks in a work breakdown structure containing task relationships, create and assign

resources, and finalize the project to implement the project plan. You will exchange project plan data with other applications, update project plans, create custom reports, and reuse project plan information. You will collaborate with your project team using Microsoft Project Server and Project Web Access.

You will use Project Web Access to connect to the Project Server in order to view, report progress on, and communicate information regarding task assignments. You will also manage to-do lists, create status reports, and access issues, risks, and documents. Finally, you will use both the Project and Resource Centers to view project status.

Target Student: This course is valuable for those interested in learning the latest techniques used in project management to effectively manage their projects. It is also for experienced project managers who desire to increase their project management skills and apply a standards-based (PMI PMBOK) approach to project management. This course is designed for a person who may be responsible for creating and modifying project plans, and who needs to learn how to use Microsoft Project Professional, Server and Web Access to manage those project plans.

Prerequisites: There are no prerequisites. This course is for people just becoming formal project managers and team leaders and team members wanting to do a better job at project management. Students enrolling in this class should have little or no understanding of project management concepts and how to use Microsoft Project.

Delivery Method: Instructor led, group-paced, classroom-delivery learning model with structured hands-on activities.

Connectivity to Microsoft Project Server will be made available by the client. This will enable class participants to learn how to collaborate, publish and retrieve projects using the MS-Project Server. Participants can also gain experience using Project Web Access (PWA) to assign and delegate tasks, keep track of time sheets and other PWA functions.

Performance-Based Objectives

Upon successful completion of this course, students will be able to:

- Discuss PMI PMBOK Guide's five process groups and nine knowledge areas.
- Initiate a project.
- Develop a project charter
- Define project scope.
- Create a project plan
- Explore the Microsoft Office Project environment and the various views in which you can verify project information.
- Create a new enterprise project on the Project Server.

- Resource an enterprise project.
- Establish a project within the EPM solution.
- Create a project plan file and enter task information.
- Create a work breakdown structure by organizing tasks and setting task relationships.
- Assign project resources.
- Finalize the project plan file.
- Exchange project plan data with other applications.
- Update a project plan.
- Create custom reports.
- Re-use existing project plan information.
- Collaborate with the MS-Project Server.
- Use Project Web Access.
- Develop schedule and cost performance baselines for a project.
- Plan project quality, staffing, and communications.
- Build a Work Breakdown Structure (WBS).
- Use a network diagram to display a Project Evaluation and Review Technique (PERT) chart.
- Use the Critical Path Method (CPM) in the network diagram to ensure the correct project duration.
- Develop cost estimates and budgets.
- Plan project quality, staffing, and communications.
- Analyze project risks and plan risk responses.
- Define project procurement requirements and Plan project procurement.
- Manage project procurement.

Course Content

Lesson 1: The PMI Project Life Cycle and PMBOK

Initiating a Project

- Definition of a Project
- Definition of Project Management -Role and expectations of the Project Manager
- Communicating with the requestor and appropriate levels of management
- Project phases and gates
- Organizational structures (functional, matrix and project organizations)
- Project Management process groups
- Project Management knowledge areas (PMI PMBOK)
- Review of sample project for team exercises
- Select a Project

Successfully Launching a Project: The Project Charter

- Reasons for doing projects
- Understanding project financial terms
- Understanding the business case for a project
- Understanding the role of project stakeholders
- Use of a project charter to ensure alignment
- Review of Project Charter Template
- Team exercise - determine the business case for a project
- Team exercise - developing a project charter and Preliminary - Scope Statement

Planning Your Work

- Develop an Initial Project Plan
- Review the purpose of the Integrated Project Plan

Developing the Project Definition - The Scope Statement

- Create a Scope Statement
- Determining major project deliverables
- Understanding the relationship between scope, cost and schedule
- Project objectives: criteria for success
- Elements of a project plan
- Use of a scope statement to document major deliverables & objectives
- Review of Project Scope Template
- Team exercise - develop a scope statement

The Work Breakdown Structure

- Work Breakdown Structure (WBS) - basis for project planning
- Decomposition of deliverables
- Develop a Work Breakdown Structure (WBS)
- Sample WBS's
- Review of WBS Template
- Class exercise - develop a WBS
- Team exercise - develop a WBS

Developing Project Schedules

- Create an Activity Definition List
- Activity sequencing
- Create a Project Network Diagram
- Acquire Activity Duration Estimates and Determine Safety Factors
- Identify the Critical Path
- Critical path and float concepts
- Develop a Project Schedule
- Schedule compression techniques
- Determine Resource Requirements
- Review of Project Schedule Template
- Team exercise: develop a project schedule

Cost Estimating & Budgeting

- Estimate Project Costs
- Developing a project estimate and budget using various techniques
- Review of Project Budget Template
- Establish a Cost Baseline
- Use of risk analysis to determine contingency
- Project performance measurement
- Methods to report costs and progress
- Schedule and cost performance indices
- Team exercise - analyze project cost report

Planning Project Quality, Staffing, and Communications

- Documentation requirements for Quality, Staffing and Communications
- Review of Project Quality, Staffing and Communications Templates
- Create a Quality Management Plan
- Document Roles, Responsibilities, and Reporting Relationships
- Assign Project Staff
- Create a Communications Management Plan

Identifying and Analyzing Risks and Planning Risk Response

- Understanding the nature of risk
- Impact of stakeholders risk tolerance on project plans
- Understanding your risk tolerance level -Types of risk
- Risk Identification techniques
- Difference between risk causes, risk events and impacts
- Review of Project Risk Template
- Create a Risk Management Plan
- Identify Project Risks and Triggers
- Perform Qualitative Risk Analysis
- Perform Quantitative Risk Analysis
- Determining the probability and impact of risks
- Use of decision trees for risk analysis
- Develop a Risk Response Plan
- Team exercise - identifying risks on a sample project
- Team exercise: decision tree example
- Team exercise: determining risk factors & developing risk response plans
- Team exercise: Document Risk

Planning Project Procurement

- Develop a Procurement Plan
- Review of Project Procurement Template
- Prepare a Statement of Work
- Prepare Procurement Documents

Establishing an Effective Control Process

- **Setting the baseline schedule**
- **Monitoring actual task progress**
- **Analyzing progress against the baseline**
- **Correcting the project plan to achieve the objectives**

Implementing and Working the Plan

- **Execute the Project Plan**
- **Getting the information you need**
- **Picking up warnings of trouble ahead**
- **Avoiding creeping commitments**
- **Knowing when and how to replan**
- **The role of the baseline plan**
- **Implement Quality Assurance**
- **Develop the Project Team**
- **Distribute Project Information**
- **Solicit Proposals, Quotes, or Bids**
- **Select a Seller**
- **Administer a Contract**

Managing Project Changes

- **The Nature of Changes on a Project**
- **Control Project Scope Changes and Scope Creep**
- **The Change Management Process: Procedures, Forms, Approvals**
- **Review of Project Change Templates**
- **Class Exercise: Dealing with a Project Change**
- **Team Exercise: Dealing with a Project Change**
- **Team Exercise: Documenting a Project Change**

Tracking and reporting progress

- **Reading information from the Gantt chart**
- **Tracking costs, head count and resources**
- **Planned vs. actual project performance**
- **Avoiding the 90-percent-complete trap**
- **Paper vs. PC tools**
- **Classroom Demonstration: The documentation abilities of - Microsoft Project and other Project Management Tools**

Monitoring and Controlling the Project

- **Monitoring and controlling project work, schedules, costs, - risks, and contracts**
- **Manage Changes to Performance Baselines**
- **Review Deliverables and Work Results**
- **Control the Project Schedule**
- **Control Project Costs**

- Control Project Quality
- Report Project Performance
- Monitor and Control Project Risk

Closing the Project

- Managing project closure and maintenance
- Obtain Formal Acceptance
- Create Project Close-out Documents
- Lessons Learned
- Close Out a Contract

Effective Project Communications

- Planning for effective project communications
- Developing an effective project team
- Running effective meetings with concise meeting notes & action items
- Project status reporting
- Effective use of email
- Leadership styles
- Dealing with project conflicts
- Team exercise: developing a communications matrix
- Team exercise: dealing with a project conflict

Adapting to the project manager's role

- Getting commitment from the team
- Designating team member roles
- Accepting ownership and responsibility
- Designing your management role

Best Practices for Managing Projects

- Communication
- Documentation
- Project Manager
- Project Team
- Other Stakeholders

Lesson 2: Creating a Project Plan File in MS-Project

- Create a Project Plan File
- Create and Assign a Project Calendar
- Add Tasks to the Project Plan File
- Add a Project Summary Task
- Add a Recurring Task
- Enter Task Duration Estimates

Lesson 3: Creating a Work Breakdown Structure

- Outline Tasks
- Link Dependent Tasks
- Identify Deliverables in the Project Plan File
- Constrain Tasks
- Set a Task Deadline

Lesson 4: Creating and Assigning Resources

- Create Resources
- Create a Resource Calendar
- Assign Resources
- Assign Additional Resources to a Task
- Resolve Resource Conflicts

Lesson 5: Finalizing the Project Plan

- View the Critical Path
- Shorten the Project Duration
- Set a Baseline
- Display Project Summary Information

Lesson 6: Exchanging Project Plan Data with Other Applications

- Import a Task List from an Excel File into a New Project Plan
- Create a Custom Import Map
- Export Project Plan Cost Data into Excel
- Copy a Picture into a Word Document
- Save Project Plan Information as a Web Page

Lesson 7: Updating a Project Plan

- Enter Task Progress Information
- View Task Progress
- Split a Task
- Reschedule a Task
- Filter Tasks in a Project Plan
- Save an Interim Project Plan
- Create a Custom Table
- Add Custom Columns to a Table
- Hyperlink Documents to Tasks

Lesson 8: Creating Custom Reports

- Create a Custom Report
- Modify a Custom Report's Header and Footer
- Add a Picture to a Report
- Modify a Custom Report's Margins

- **Print a Custom Report**

Lesson 9: Re-using Project Plan Information

- **Create a Project Plan Template**
- **Create a Custom Combination View**
- **Make Custom Views Available to Other Project Plans**
- **Share Resources**
- **Create a Master Project Plan**

Lesson 10: Creating a New Enterprise Project on the Project Server

- **Establish Access to the Project Server**
- **Create a New Enterprise Project**
- **Save a New Project to the Project Server**
- **Open an Existing Enterprise Project**

Lesson 11: Resourcing an Enterprise Project

- **Build a Team from the Enterprise Resource Pool**
- **Substitute Enterprise Resources Automatically**
- **Assign Local Resources to Tasks**

Lesson 12: Overview - The Collaborate Menu

- **Publish**
- **Request Progress Information**
- **Update Project Progress**
- **Project Center**
- **Resource Center**
- **Portfolio Analyzer**
- **Portfolio Modeler**
- **Risks**
- **Issues**
- **Documents**
- **Collaboration Options**
- **Tools...Enterprise Options**

Lesson 13: Establishing the Project on the Server

- **Publish All Project Information to the Team**
- **Save a Version for Reference**
- **Change Managers for Assignments**
- **Request Periodic Status Reports**

Lesson 14: Managing Project Updates

- **Update Task Progress in Project Web Access**

- **Mark Task Updates Submitted by Enterprise Resources**
- **Review Update History**
- **Adjust Updates from Resources**
- **Request Progress Information for Selected Tasks**

Lesson 15: Managing Project-related Information

- **Compile a Team Status Report**
- **Manage Issues**
- **Mitigate Risks**
- **Upload a Document**
- **AutoFilter Project-related Files**

Lesson 16: Analyzing Enterprise Project Information

- **Compare Versions of an Enterprise Project**
- **View Projects in the Project Center**
- **Use the Portfolio Analyzer**

Lesson 17: Using Project Web Access and SharePoint Server

Introduction and Overview

- **Microsoft Project Product Family Overview**
- **Microsoft Project Server Architecture**
- **Supporting Technologies**
- **System Requirements**
- **Setup Enhancements**
- **Functions of Setup.exe**
- **Microsoft Project Desktop Client Setup User Interface**
- **Microsoft Project Server Setup User Interface**
- **Automatic Recovery (Rollback)**
- **Registry Settings**
- **Upgrade Considerations**
- **Enterprise Tools**
- **Installation from a URL**
- **Licensing Architecture**

Server Overview

- **Microsoft Project Server Overview**
- **Overview of Microsoft Project Server**
- **Accessing Microsoft Project Server**
- **Connecting to the Microsoft Project Server**
- **Logging on to the Microsoft Project Server**

- **Viewing Microsoft Project Server Pages in Microsoft Project**
- **The Microsoft Project Server Interface Overview**
- **Functionality Overview**
- **User Types and Microsoft Project Server**
- **User Types**
- **Roles and Functionality**

The Home Page

- **Home Page Overview**
- **Home Page Content Overview**
- **Other Home Page Links**
- **To Display the Project Web Access Page in Outlook**
- **To Display a Digital Dashboard page in Outlook**
- **Changing Passwords**
- **Set E-mail Notifications Overview**
- **To Go Offline**
- **To Go Back Online**

The Tasks Page

- **Tasks Overview**
- **Viewing and Updating Tasks**
- **Tasks & Fields in the Task Sheet**
- **Change Task Order**
- **Task Actions Menu Bar**
- **View Types in View my Tasks**
- **Updating Tasks**
- **Update Progress on Task Assignments**
- **Creating New Tasks**
- **Delegating Tasks**
- **Search for Task Information in a View**
- **Change Tasks Displayed**
- **Set View Options**
- **Print Task Information**
- **Work Offline**
- **Transfer Non Working Time**
- **Notify Work Day Changes**
- **Attach Notes to Task Assignments**
- **Reject an Existing Task Assignment**
- **Assign Yourself to an Existing Task**
- **Notify Your Manager of a Change in Availability**

Status Reports

- **Status Reports Overview**
- **User Groups and Status Reports**
- **Request a Status Report**
- **Submit a Status Report**
- **Responding to a Requested Status Report**
- **Submit an un-requested Status Report**
- **Viewing Status Reports**
- **Status Reports Archive**
- **Sending Status Updates**

The Update Page

- **Update Page Overview**
- **Viewing and Updating Task Changes**
- **Viewing Task Updates**
- **Update Action Menu Bar**
- **Customizing the Task Updates View**
- **Updating Task Changes into Project Plans**
- **Update Changes to Resource Calendars**
- **Set Rules to Automate Changes**
- **Task Change History**

The Documents Page

- **Documents Overview**
- **Creating a Subweb**
- **Viewing and Uploading Project Documents**
- **Documents Page**
- **Document Library**
- **Uploading Project Documents**
- **Other Functions of the Library Page**
- **Public Documents**
- **Search Documents**

Managing Risks, Issues, and Documents

- **Work with Risks**
- **Work with Issues**
- **Issues Overview**
- **Create an Issue**
- **View Issues by Individual Project**
- **Submit New Issues**
- **Filtering Issues**
- **Edit an Issue**

- **Work with Documents**
- **Filter Risks, Issues, and Documents**

Using To-do Lists

- **Create a To-do List**
- **Modify a To-do List Item**
- **Set To-do List Options**

Viewing Project Status Within the Enterprise

- **Work in the Project Center**
- **Work in the Resource Center**

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