

Course Outline

Project 2007 Level 3

1 Day

Description

This course covers the advanced topics in Project 2007. Class activities include working with the Network Diagram view; customizing fields and groups; creating customized Work Breakdown Structure (WBS) codes; creating custom forms; changing the formatting in graphical views; defining customized reports; and recording and playing macros. As a participant in this one-day session, you also customize menu bars and toolbars; learn how to share resources among multiple projects; consolidate multiple projects; share information between Project and other applications; and send project information to members of your workgroup.

Prerequisites

- Project 2007 Level 1 and Level 2 or equivalent experience.

Who Should Take This Course?

This course is intended for users of Project 2007 who want to learn to strategically use the software's tools to define, automate, import, export and share project information.

Objectives

- ✓ Format views within Network Diagram.
- ✓ Customize fields, create and apply groups, and customize Work Breakdown Structure (WBS) codes.
- ✓ Create custom forms.
- ✓ Change the formatting in graphical views.
- ✓ Define customized reports.
- ✓ Use the Organizer to work with the Global template.
- ✓ Record and play macros, and customize menu bars and toolbars.
- ✓ Share resources among multiple projects.
- ✓ Consolidate multiple projects.
- ✓ Share information between Project and other applications.
- ✓ Send project information to members of your workgroup.
- ✓ Track project information using Project Central and the Internet or intranet.

Outline

Using the Network Diagram View

- Reviewing the Network Diagram View
- Formatting Network Diagram Boxes
 - Formatting Network Diagram Box Borders
 - Changing Network Diagram Box Contents
- Controlling the Layout of Network Diagram Boxes
 - Changing the Position of Nodes Manually
- Applying Filters in Network Diagram View
 - Displaying Task Chains
- Printing a Network Diagram
 - Making Adjustments for Page Breaks

Working with Custom Fields, Grouping, and WBS Codes

- Using Custom Fields
 - Customizing Fields
- Creating a Value List
- Defining Custom Formulas

- Working with Groups in Views
 - Applying Groups to Views
 - Creating a Custom Group
- Using Grouping with Filtering and Sorting
 - Using Sorting with Grouping
 - Using Filtering with Grouping
- Customizing WBS Codes
 - Viewing Work Breakdown Structure Codes
 - Creating Custom WBS Codes
 - Modifying a Task's WBS Code
 - Renumbering the WBS Codes

Customizing Forms

- Displaying a Custom Form
- Creating a Custom Form
 - Adding a Group Box
 - Adding a Field
 - Adding Text
- Saving and Exiting the Custom Form

Formatting Graphical Views

- Formatting Views Overview
- Formatting Gantt Bars
 - Exploring the Bar Styles Dialog Box
 - Formatting Bars for a Task Category
 - Adding a New Gantt Bar
- Adding Text to Gantt Bars
 - Adding Field Values to the Gantt Chart
 - Annotating with New Text
- Changing the Timescale
- Showing Rollup Tasks
- Formatting the Calendar View
 - Formatting the Timescale
 - Formatting Bars
 - Changing the Size of the Date Boxes
- Formatting the Resource Graph

Customizing Reports

- Defining a New Report
 - Report Types
 - Creating a Task or Resource Report
 - Creating a Monthly Calendar Report
 - Creating a Crosstab Report
- Editing a Report
- Creating a Report Based on Another Report

Customizing the Project Environment

- Understanding the Global File
- Using the Organizer
 - Copying an Element
 - Deleting an Element
- Using Macros
 - Recording a Macro
 - Working with Macros
 - Playing a Macro
- Customizing Toolbars
 - Creating a New Toolbar
 - Editing a Command on the Toolbar
- Customizing the Menu Bar
 - Creating a New Menu

Working with Multiple Files

- Using Resource Pools
 - Viewing Linked Project Files
- Using Workspaces
 - Creating a Workspace
 - Opening a Workspace
- Combining Projects
 - Consolidating Projects with the New Window Command
 - Inserting a Project into Another Project
 - Working with Project Links
- Linking Tasks Between Projects
 - Opening a Linked File

Sharing Information with Other Applications

- Copying Information to and from Project
 - Copying Project Information into Other Applications
 - Copying Information from Another Application into Project
- Linking Information
 - Linking an Object
 - Linking Data
- Inserting Objects
 - Inserting a New Object
 - Inserting Existing Information
- Importing and Exporting Information
 - Saving a Project in the Project Database Format
 - Exporting Information to Another File Format
 - Exporting Information Using a Customized Import/Export Map
 - Importing Information from Another Application
 - Exporting Information to Web Page (HTML) Format

Using Workgroup Features in an E-Mail System

- Using Project's Workgroup Features
 - Displaying the Workgroup Toolbar
- Notifying Resources of Assignments
 - Responding to a TeamAssign Message
 - Updating the Project Based on the Response
- Requesting Status Updates
 - Responding to a TeamStatus Message
- Sending Schedule Notes
- Customizing Workgroup Features

Appendix: Project Macros