Excel Consulting

Online Modules

Project Level 1 Online

Contents

Key Concepts
Understand the term project.
Recognise the main elements of managing a project like:
Planning the project.
Managing the schedule.
Communicating project information.
Understand the advantages of using a project management application like:
Efficient project design.
Ease of project plan maintenance.
Effective activity representation.
Ease of monitoring and reporting.
Understand the tools and features of a project management application like:
Gantt chart.
Network diagram.
Work breakdown structure.
Recognise that managing projects involves balancing work, time, resource, and cost.

Working with Projects
Open, close a project management application.
Open, close projects.
Save a project to a location on a drive.
Save a project under another name to a location on a drive.
Save a project as another file type like: template, web page, spreadsheet, CSV, XML, text file, pdf.
Change between project views modes like: Gantt chart, network diagram. Use magnification/zoom tools.

Starting a New Project
Create a new project based on default template.
Create a new project based on other available template,
Understand how choosing to schedule from a start date, finish date will impact on the project schedule.

Enter basic project information such as:
Start date or finish date.
Scheduling options and project properties like:
Project title, project manager.
Set up calendar options like: base calendar, working time, and nonworking time.

Creating Tasks
Create, modify tasks.
Copy, move, delete tasks.
Create, modify, view subtasks and summary tasks.
Understand task duration options: elapsed, duration, effort, estimated.
Set, modify task duration.
Split tasks.
Understand the term milestone.
Create project milestones.
Create, modify recurring tasks.

Scheduling and Relationships
Understand logical relationships between tasks: finish to start, start to start.
Create, modify, and delete relationships between tasks: finish to start, start to start.
Understand the terms lead time, lag time.
Add, edit task lag time, lead time.

Constraints and Deadlines
Understand task constraint options like: as late as possible, as soon as possible, must finish on, must start on.
Add, modify, delete constraints to tasks.
Understand the term deadline.
Create a deadline.

Notes, Hyperlinks
Add, edit, and remove a note for a task.
Insert, edit, and remove a hyperlink for a task. Text frame.

Resources
Identify resource types like: people, materials, equipment.
Understand the relationship between duration, work and resource.
Understand that if one element changes there is an impact on another element.
Create, delete resources. Modify resource details like: name, type, units, and rates.
Add, remove, replace resource assignments and associated units.

Costs
Understand the terms fixed cost, variable cost.
Assign, modify fixed costs.
Assign, modify variable costs.

Critical Path
Understand the terms critical task, critical path.
Identify critical tasks and show the critical path.

Monitoring Progress and Rescheduling
Create, save, and clear a baseline.
Show, hide progress line.
Show, hide columns like: % complete, fixed cost, deadline.
Sort, filter tasks.
Update task progress.
Reschedule incomplete work.
Display current project schedule and baseline.

Setup
Add different types of drawn object
Change page orientation: portrait, landscape. Change paper size.
Change page margins: top, bottom, left, right.

Product Information

Prepare a Gantt chart, network diagram for print using options like: columns to print, notes.

Print

Preview a Gantt chart, network diagram, report.

Print a Gantt chart, network diagram, and report from an installed printer using output options like: entire document, specific pages, number of copies.