informatech

DATA MANAGEMENT AND BUSINESS INTELLIGENCE | DMBI-017

Basics and Tools In MS Excel and MS Project for Project Managers

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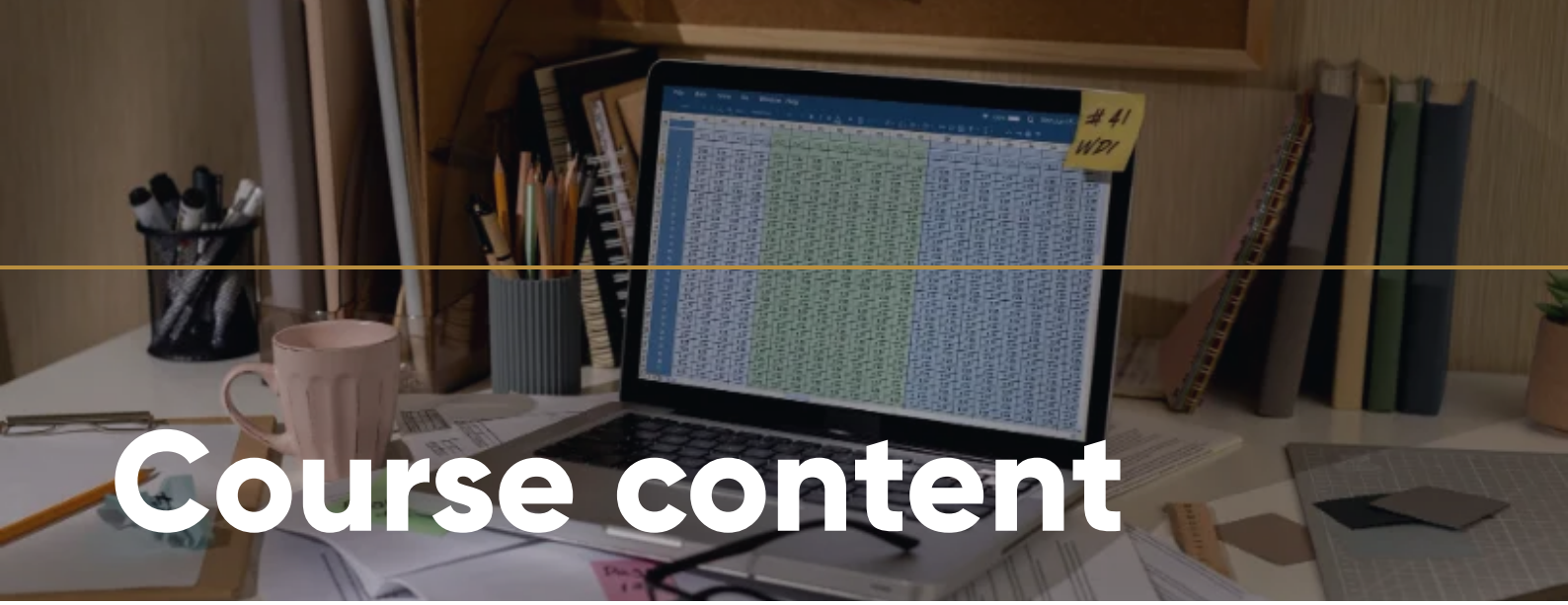


Course content

Why Attend

Why Attend Project managers need practical tools to plan, monitor, analyze, and communicate project information effectively. This course provides participants with the essential and advanced skills required to utilize Microsoft Excel and Microsoft Project for project planning, scheduling, reporting, resource management, performance analysis, and stakeholder communication.

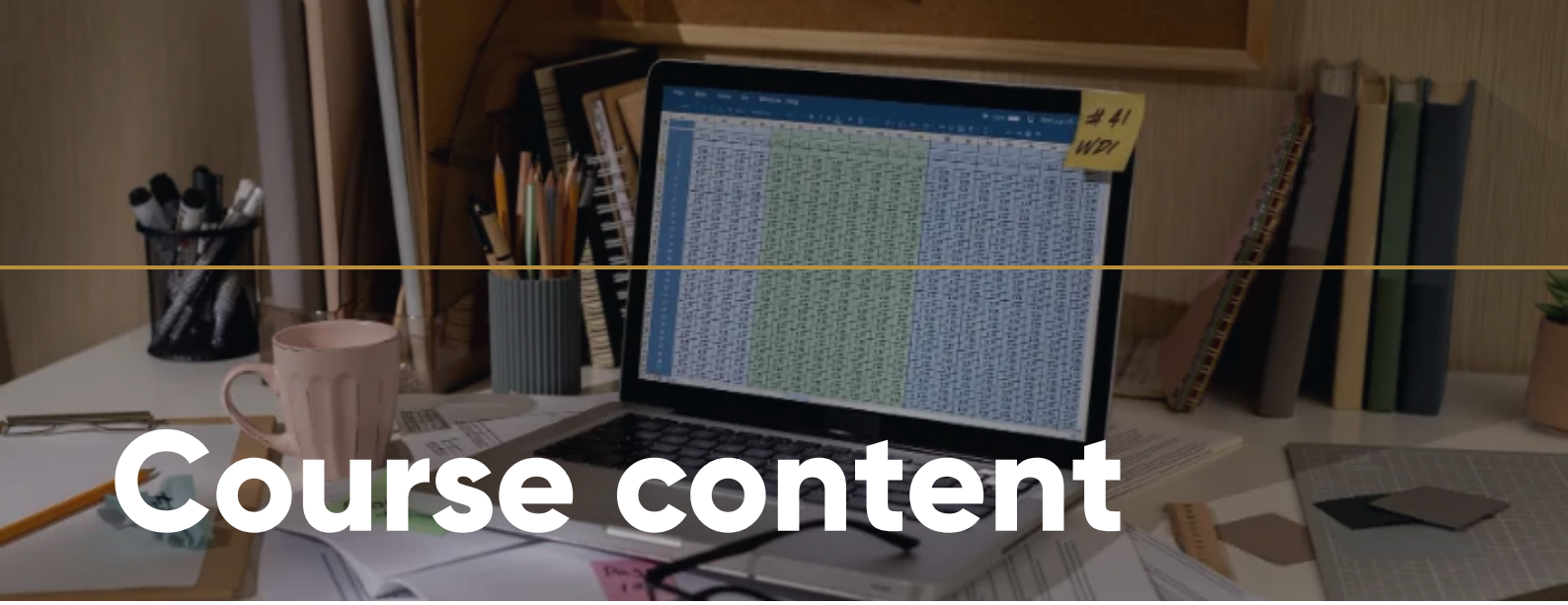
Course Methodology The course combines hands-on workshops, guided exercises, demonstrations, case studies, practical assignments, project simulations, and real-world examples to ensure participants gain practical experience using both MS Excel and MS Project.

Course Objectives By the end of this course, participants will be able to:

- Utilize Microsoft Excel for project data management and analysis
- Create project dashboards and performance reports using Excel
- Develop project schedules and plans using Microsoft Project
- Manage project resources, timelines, and progress tracking
- Generate professional project reports and visualizations
- Integrate Excel and MS Project for enhanced project control
- Improve project decision-making through data analysis and reporting

Target Audience

- Project managers
- Project coordinators
- Project planners and schedulers
- PMO professionals
- Team leaders and supervisors
- Engineers and technical professionals involved in projects
- Professionals seeking to improve project planning and reporting skills



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Target Competencies

- Project scheduling
- Data analysis and reporting
- Resource management
- Dashboard development
- Project monitoring and control
- Microsoft Excel proficiency
- Microsoft Project proficiency
- Project performance management

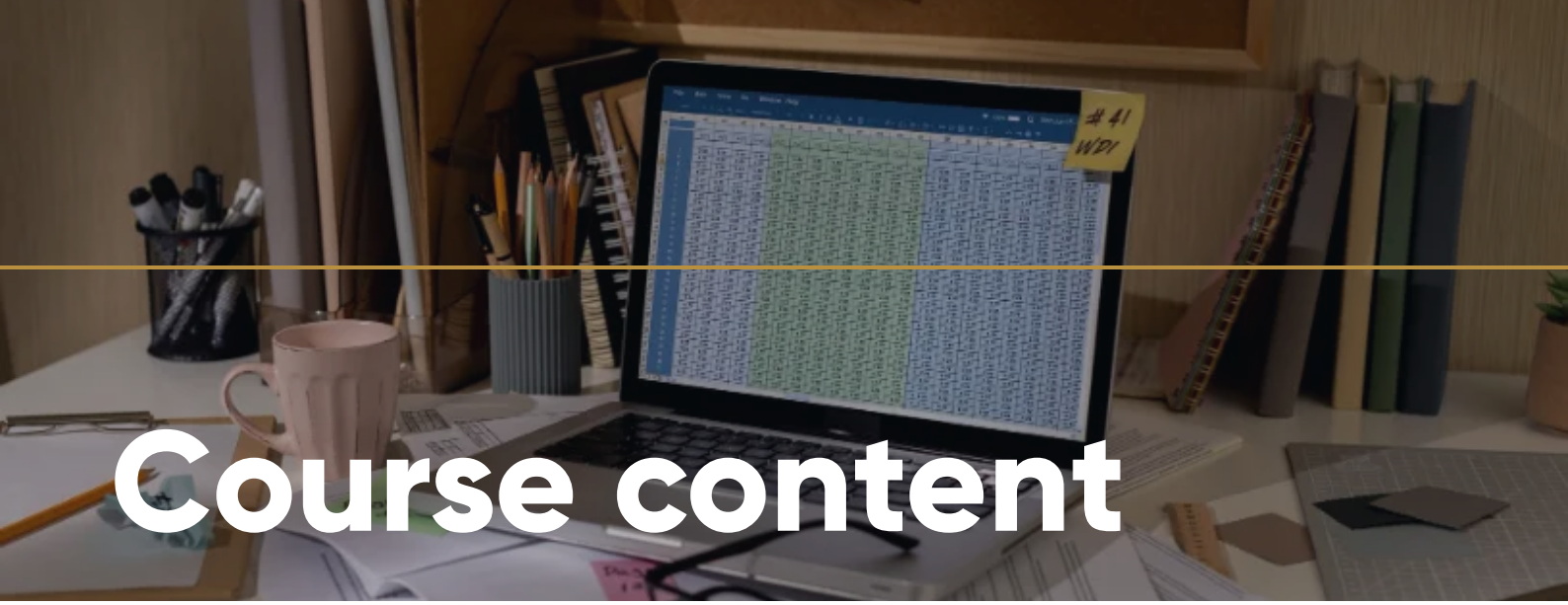
Course outline

Day 1: Introduction to Microsoft Excel and Microsoft Project

- Understanding the role of Excel and MS Project within project management environments
- Exploring the interfaces, navigation tools, and key functionalities of both applications
- Organizing project information and maintaining project data effectively
- Applying essential formulas and functions for project calculations and analysis
- Managing project data efficiently using spreadsheets and structured workbooks
- Visualizing project information through tables and basic reporting techniques

Day 2: Advanced Excel Techniques for Project Management

- Applying advanced formulas and analytical functions to project data
- Creating professional charts and graphical project reports
- Utilizing data validation techniques to improve data quality and consistency
- Applying conditional formatting to highlight project performance indicators
- Developing interactive reports using pivot tables and filtering tools



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Course outline

• Building project dashboards for monitoring schedules, costs, and performance metrics

• Practical workshop: Designing an Excel-based project dashboard

Day 3: Project Planning and Scheduling with Microsoft Project

• Understanding the Microsoft Project environment and project management features

• Creating project schedules and defining project activities

• Establishing task relationships, dependencies, and milestones

• Assigning resources and balancing workloads effectively

• Monitoring project progress and updating project status information

• Utilizing Gantt Charts and timeline views to communicate project schedules

• Practical exercise: Developing a project schedule using Microsoft Project

Day 4: Advanced Project Scheduling and Reporting

• Creating customized fields, tables, and project views

• Managing multiple projects and portfolio-level scheduling activities

• Linking projects to create integrated schedules and reporting structures

• Applying earned value management techniques for performance measurement

• Generating advanced reports and visual dashboards for stakeholders

• Analyzing schedule performance and resource utilization

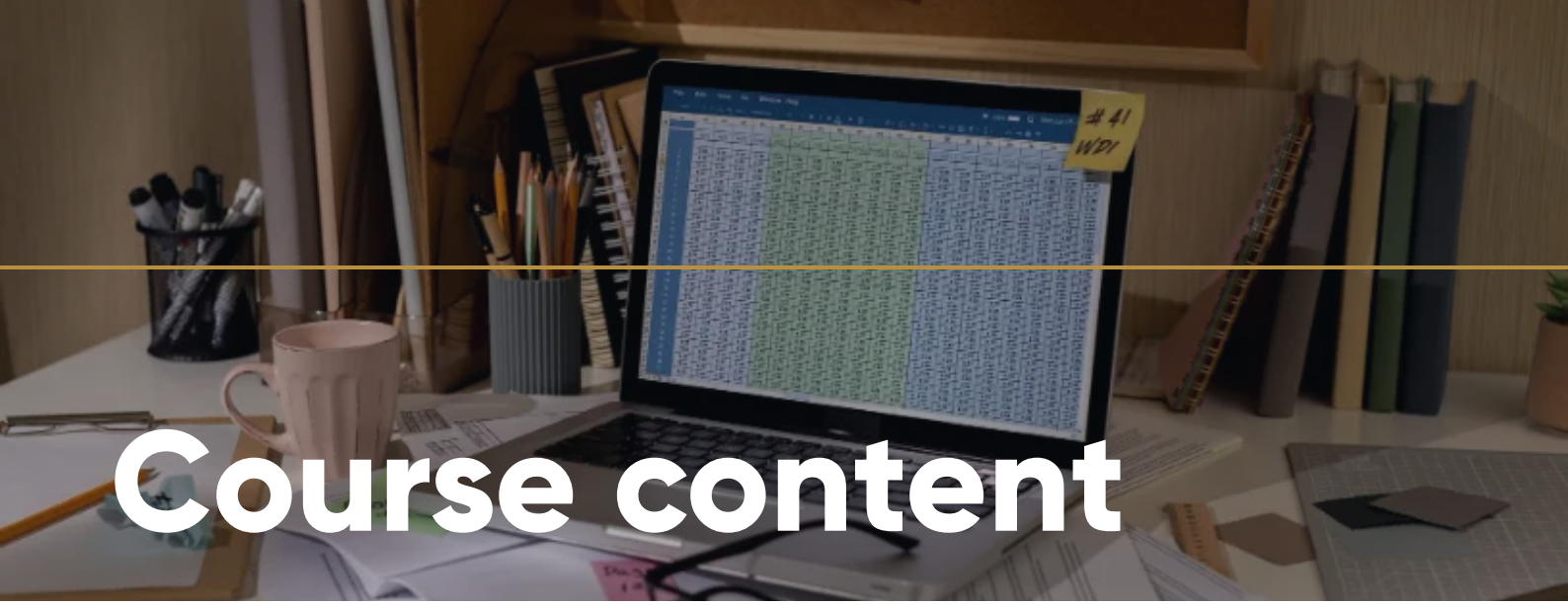
• Practical workshop: Building an integrated master project schedule

Day 5: Integrating Microsoft Excel and Microsoft Project

• Importing project information between Excel and Microsoft Project

• Exporting project schedules, resource data, and cost information for analysis

• Enhancing project reporting through Excel visualization capabilities



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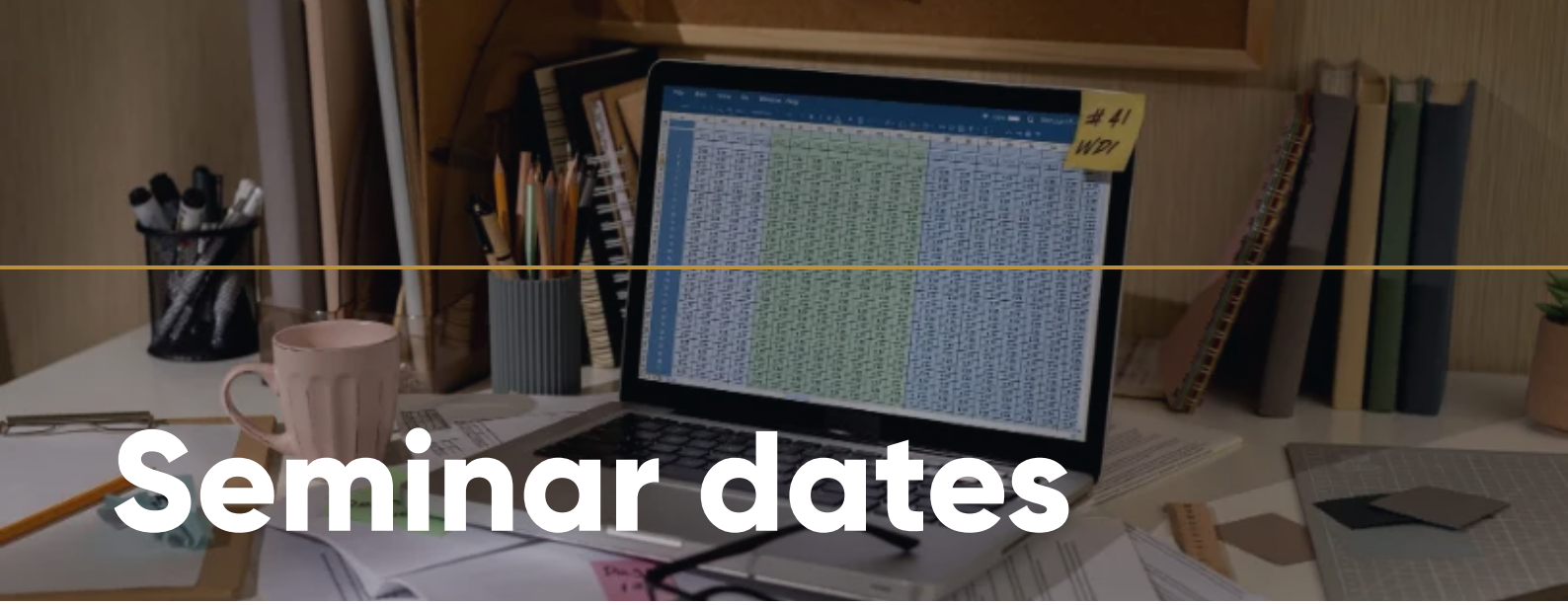
Course outline

- Analyzing project performance trends using Excel tools and techniques
- Maintaining data accuracy and consistency across project management systems
- Developing integrated reporting processes for project stakeholders
- Practical exercise: Creating combined project performance reports using Excel and MS Project
- Course review, lessons learned, and implementation planning



Seminar dates

Available seminar dates

Live dates and pricing for Basics and Tools In MS Excel and MS Project for Project Managers generated from the course details page.

Date	Location	Format	Fee
Dates on request	Venue on request	Classroom	**Contact us**

Live online option	Online delivery is available at €1,850.-.