

## Microsoft Project Advanced Training

### OVERVIEW

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Microsoft Project Advanced is designed for experienced users who manage complex projects, multiple schedules, and shared resources. This one-day course moves beyond day-to-day scheduling into customisation, multi-project management, advanced reporting, and automation.

You'll learn how to design Project to match your organisation's way of working — from custom fields and views to templates — and how to manage linked projects, pooled resources, and large files efficiently.

### LEARNING OUTCOMES

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By the end of the course, you will be able to:

- **Create and use custom fields** (with calculations) to add meaningful project intelligence
- **Build and manage WBS codes** for consistent structure and reporting
- **Design custom views** with filters, groups, and tables tailored to your stakeholders
- **Run, modify, and create reports** — including graphical and visual reports — for powerful insights
- **Use templates** to standardise best-practice project setups across your organisation
- **Link multiple projects** and **share resource pools** to coordinate across teams
- **Downsize and optimise large project files** for performance and maintainability
- **Export and integrate data** with other applications for analysis and reporting
- **Automate repetitive tasks with VBA macros** to save time and reduce errors

These outcomes enable users to implement advanced project controls, customise Microsoft Project to their organisation, and work more efficiently across large or multi-project environments.

### PREREQUISITES

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Designed for experienced Microsoft Project users who regularly build, update, and manage detailed schedules and want to take full advantage of custom fields, templates, reporting, multi-project functions, and automation.

## DURATION & DELIVERY

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The duration of this course is 1 day, without alterations.

We offer flexible delivery to suit your team and environment:

- **Onsite at your workplace** – highly interactive, tailored to your processes and projects
- **Live online training** – instructor-led, hands-on sessions via your preferred platform
- **Customised delivery** – mix and match topics across **Introduction, Intermediate, and Advanced** to create a program that fits your goals and timeline

All sessions are led by experienced Microsoft Project specialists with real-world implementation and project management experience.

## COURSEWARE

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High quality learning materials are available for purchase for each student.

Some of the courseware provided is based on the **2016 edition of Microsoft Project**. While the version number may appear older, the foundational concepts, workflows, scheduling logic, and functionality covered in the materials remain **fully relevant and accurate** for all current Microsoft Project desktop versions.

Where version differences exist — such as interface updates, new capabilities, or enhanced features — **our trainers will point these out during the session and incorporate them into the training**. This ensures participants always learn the most current, applicable, and practical information for the version your organization uses.

We do hope to update the courseware in the future.

## MICROSOFT PROJECT TRAINING PATHWAY

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Our Microsoft Project training is offered across three progressive one-day courses – **Introduction, Intermediate, and Advanced**. Whether you are new to Microsoft Project, building on existing skills, or managing complex multi-project environments, there is a course tailored to your needs.

All courses can be delivered as is, or we can customise a training program, so your team completes the exact topics they need in the number of days that suits your organisation.

- **Microsoft Project Introduction** – Build a solid foundation by learning how to create projects, work with tasks and resources, schedule effectively, track progress, and produce clear project information.
- **Microsoft Project Intermediate** – Extend your skills with resource levelling techniques, cost tracking, constraints, advanced views, tables, formatting tools, and enhanced reporting.
- **Microsoft Project Advanced** – Master complex project environments including custom fields, WBS codes, advanced reporting, project templates, shared resources, multi-project linking, data export, and automation with VBA.

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**COURSE DETAIL****Custom Fields**

- Understanding Custom Fields
- Creating Custom Fields
- Inserting Custom Fields
- Creating a Formula in a Custom Field
- Modifying a Formula
- Testing a Formula
- Understanding Graphical Indicator Custom Fields
- Creating Graphical Indicator Custom Fields
- Creating a Lookup Custom Field
- Creating an Outline Code Mask
- Entering Lookup Table Values
- Using a Lookup Table

**WBS Codes**

- Understanding WBS Codes
- Creating WBS Codes
- Altering Tasks with Custom WBS Codes
- Renumbering WBS Codes
- Editing Custom WBS Codes

**Custom Views**

- Preparing for the Custom View
- Creating a Custom Filter for the View
- Creating a Custom Group for the View
- Creating a Custom Table for the View
- Creating the Custom View
- Removing a Custom View and Its Components

**Graphical Reports**

- Understanding Graphical Reports
- How Graphical Reports Work
- Running a Report
- Formatting Chart Objects
- Manipulating Report Data
- Filtering Report Data
- Cloning an Existing Report
- Creating a New Report
- Enhancing Report Appearance
- Making Reports Global
- Removing Unwanted Reports

**Visual Reports**

- Understanding Visual Reports
- Understanding Excel Visual Reports
- Creating a Visual Report from a Template
- Choosing Fields to Display in a Visual Report
- Changing the X Axis Categories
- Filtering a Visual Report
- Formatting a Visual Report
- Saving a Visual Report as a Template
- Using a Custom Visual Report Template

**Project Templates**

- Understanding Project Templates
- Examining the Templates
- Saving a Project as a Template
- Using a Custom Project Template
- Specifying the Personal Templates Folder
- Using the Personal Template Folder
- Modifying a Template
- Understanding the Global Template
- Organising the Global Template
- Applying a Newly Organised Item
- Removing Items from the Global Template

**Linking and Combining Projects**

- Understanding Linked Projects
- Combining Projects
- Viewing a Combined Project
- Printing From a Combined Project
- Setting a Combined Project Start Date
- Changing Data in a Combined Project
- Saving and Closing a Combined Project
- Using Only the Combined Project File
- Using Only Subproject Files
- Inserting Subprojects
- Breaking Subproject Links
- Creating a Read Only Subproject
- Inserting Task Links
- Creating a Summary Milestone

**Shared Resources**

- Understanding Resource Sharing
- Creating a Common Resource Pool
- Linking to an External Pool
- Linking a New Project File to the Pool
- Assigning Resources from the Pool
- Working With Shared Resources
- Checking for Resource Links
- Managing Shared Resources
- Opening Shared Resource Projects
- Opening the Resource Pool Only
- Assembling a Resource Master
- Working With a Resource Master

**Downsizing Larger Projects**

- Understanding Project Downsizing
- Creating the Resource File
- Creating Smaller Projects
- Linking Subprojects to Resources
- Preparing for the Master Project
- Creating the Downsized Master File
- Setting Project Links

**COURSE DETAIL (Cont..)**

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**Downsizing Larger Projects (cont.)**

- Finalising the Master

**Other Applications**

- Understanding Working with Applications
- Copying a Gantt Chart Image
- Copying Table Data
- Copying to Microsoft Excel
- Linking to Microsoft Excel
- Exporting to Microsoft Excel
- Exporting to Excel Using a Map
- Importing Data from Excel

**Working Collaboratively**

- Understanding Collaboration Options
- Adding a Contact as a Resource
- Working With a Contact Resource
- Syncing Tasks with SharePoint
- Working With a Synced Task List

**Microsoft Project VBA**

- Understanding Project VBA
- Accessing the Developer Tab
- Recording a Macro
- Running a Macro
- Editing a Macro
- Running an Edited Macro
- Localising a Macro
- Running a Localised Macro