

Advanced MS Project Training: Scheduling and Agile Workflows

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Overview

Microsoft Project users often stop at Gantt bars and manual dates, and miss the features that make a schedule trustworthy. This Advanced MS Project course takes experienced users into the engine of the software: task types and the Work = Duration x Units formula, effort-driven behaviour, auto versus manual scheduling, the Team Planner, resource pools, custom fields with formulas, inserted subprojects, and the Task Board used for sprints in Project Online and Project for the web. Every session is hands-on at the keyboard, working on one sample project file that grows from a blank template to a tracked, reported, multi-project plan. This course is delivered by Agile Leaders Training Center.

Who Should Attend

- Existing Microsoft Project users who want to move past basic task lists.
- Project schedulers and planners maintaining .mpp files for large programmes.
- PMO analysts who build templates, custom views and status reports in MS Project.
- IT and software project leads who run sprints alongside a Gantt plan.
- Team leads who must share resources between several MS Project files.

Departments and Industries

The course suits any team that standardises on the Microsoft 365 project stack.

- PMO and planning teams in IT, telecoms and professional services
- Engineering departments using MS Project for design and delivery plans
- Marketing and event teams running campaign schedules
- Research and product development groups
- Government programme offices on Microsoft 365

Learning Objectives

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

- Apply fixed units, fixed work or fixed duration task types to control how MS Project recalculates.
- Build reusable templates with custom calendars, fields, tables, filters, groups and views.
- Use the Team Planner, Resource Usage view and leveling options to fix overallocations.
- Analyse multiple baselines and interim plans through the variance columns.
- Build a master project of inserted subprojects linked to a shared resource pool file.
- Use the Task Board and Sprints view to run sprints and report them next to the Gantt timeline.

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Course Agenda

Day 1: Inside the Scheduling Engine

- Project options, auto versus manually scheduled tasks and the status date
- Task types, effort-driven scheduling and the work formula in practice
- Project, resource and task calendars with working-time exceptions
- Summary tasks, milestones, recurring tasks and task inactivation
- Dependency types, lags, leads and constraints that pin dates

Day 2: Resources in MS Project

- Work, material and cost resources, max units and availability contours
- Assignment work contours and the Task Usage view
- Team Planner drag-and-drop reassignment
- Reading overallocation in the Resource Usage and Resource Graph views
- Leveling options, leveling delay and the Leveling Gantt

Day 3: Baselines, Tracking and Multiple Files

- Saving Baseline 0 to 10 and interim plans
- Updating progress with the Tracking table, Update Project and the status date
- Reading work, cost and date variance columns against the baseline
- Inserted subprojects, master files and cross-file links
- Resource pool files: sharing, refreshing and resolving conflicts

Day 4: Agile Features in Project Online and Project for the Web

- Creating sprints and assigning tasks in the Sprints view
- Task Board columns, cards and the Current Sprint board
- Mixing agile and Gantt tasks in one project file
- Reporting sprint progress with the built-in agile reports
- Syncing with Microsoft Teams and Planner

Day 5: Customisation and Reporting

- Custom fields with formulas, lookup tables and graphical indicator icons
- Building custom tables, filters, groups and views in the Organizer
- Built-in and custom reports, Timeline view and copying to PowerPoint
- Exporting to Excel and Power BI templates for dashboards
- Walk-through of scenario-style questions on MS Project features

Practical Exercises

All suggested activities are completed in Microsoft Project on the sample file built during the week.

- Suggested activity: change task types on the same task and predict how MS Project recalculates work and duration.
- Suggested activity: clear red-person overallocation icons using the Team Planner and leveling options.
- Suggested activity: merge three department files into a master project linked to one resource pool.
- Suggested activity: add a two-sprint agile phase to a traditional plan and report it on one timeline.

FAQs

Which version of Microsoft Project is used?

Exercises use Project Professional desktop; the agile module also demonstrates Project Online and Project for the web, noting which features exist in each.

Is this course suitable for beginners?

Participants should already be able to create tasks, link them and assign resources. The course starts from task types and calendars, not from the ribbon basics.

Does the course include practice questions?

Yes. Day 5 includes a walk-through of scenario-style questions on the features covered, useful for anyone who needs to demonstrate MS Project skills at work.

Conclusion

Participants leave with a working template, a set of custom views and a clear understanding of why MS Project moves their dates, so their schedules become tools they trust rather than drawings they update by hand, and a master plan linked to a resource pool they can reuse on their next programme.

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