

National[®] Brand

COMP BOOK

SUSAN CONNELL

EDUC 544 SPRING 2004

80 SHEETS • 10 x 7 ⁷/₈ • 5 x 5 QUAD • 43-475



Office Products
Brea, CA 92621
Made in U.S.A.

PROJECT EXCEL

PLAN & MANAGE PROJECTS W/ EXCEL
CREATE CALENDARS & BUDGETS
UNDERSTAND MASTER PROJECT PLANS

Learners - College ed. Proj Mgrs

Constraints

Lack of time
May prefer Project
Knowledge of Excel
Computer skills
Ability to log on only
at work

Enablers

General literacy
College degree
Motivated to
improve productivity
- financial
- more time for fun

Delivery system - Corporate intranet

Development Expense
Requires intranet access
Can't use @ home
Password / security

Interactivity / feedback
Can include samples
Reference job aids
widely available
Compatible w/ existing
LMS infrastructure

Objectives

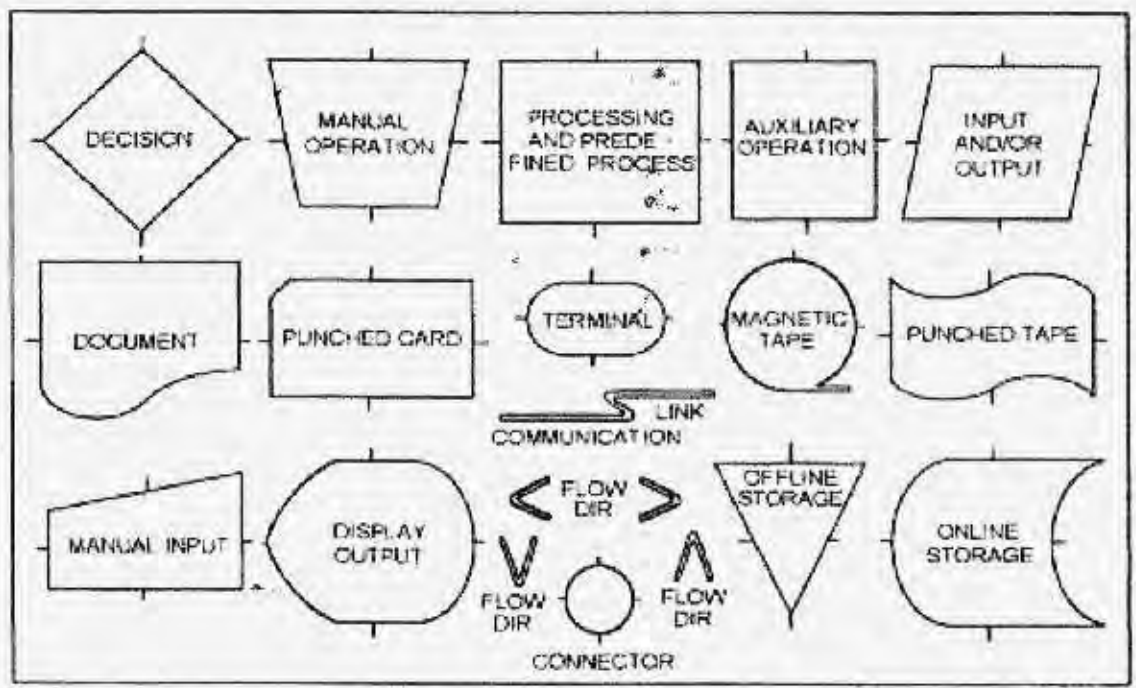
- Project Tracking
- Project Calendar
- Master Project Planning
- Project Budgeting



Symbol	Meaning
	Step or component process
	Predefined process or subroutine
	Decision point
	Output to a document or input from a document
	Data transfer to a file on disk
	Data transfer to a data store

Symbol	Meaning
	Data stored to a database
	Flowchart beginning or end
	Intra-chart connector: Flow continues to next page
	Intra-chart connector: Flow continues from previous page
	Inter-chart connector: Indicates an exit point to another flowchart
	Inter-chart connector: Indicates an entry point from another flowchart

microsoft.com/resources/documentation/windows Serv



DM JA0049

www.tpub.com/content/craftsman/140666/1529004.4 Says all you need is:



& AM TELLING ELSE LEADS TO CONFUSION

www.q-skills.com/flowchart.html

PROJECT EXCEL

Project Management - Process
Spreadsheets / S/W = Concept
Task specific Excel Procedure

Given a project task list + using provided guidelines, the learner will be able to create a project calendar with due dates and milestones

Remember Process + Apply Procedure

Lesson Content

Job analysis - Proj Mgmt / Excel

Task statement - Make Calendar

Knowledge Needed - Excel

Course Content -

INTRO -

- Importance - How do you remember deadlines, what happens if they are missed
- Content Overview - dates, times, durations in Excel using what you already know
- Objectives - create proj calendar

KNOWLEDGE NEEDED

- Concept Topics / Practice
- Fact Displays - Sample Calendars
- Process Displays - How Calendar fits into proj mgmt process

LESSON TASKS

- Procedure task Display, Demo, Practice
- Principle display, Demo, practice
- Summary

WORK

ZOOM

Leaked from other side

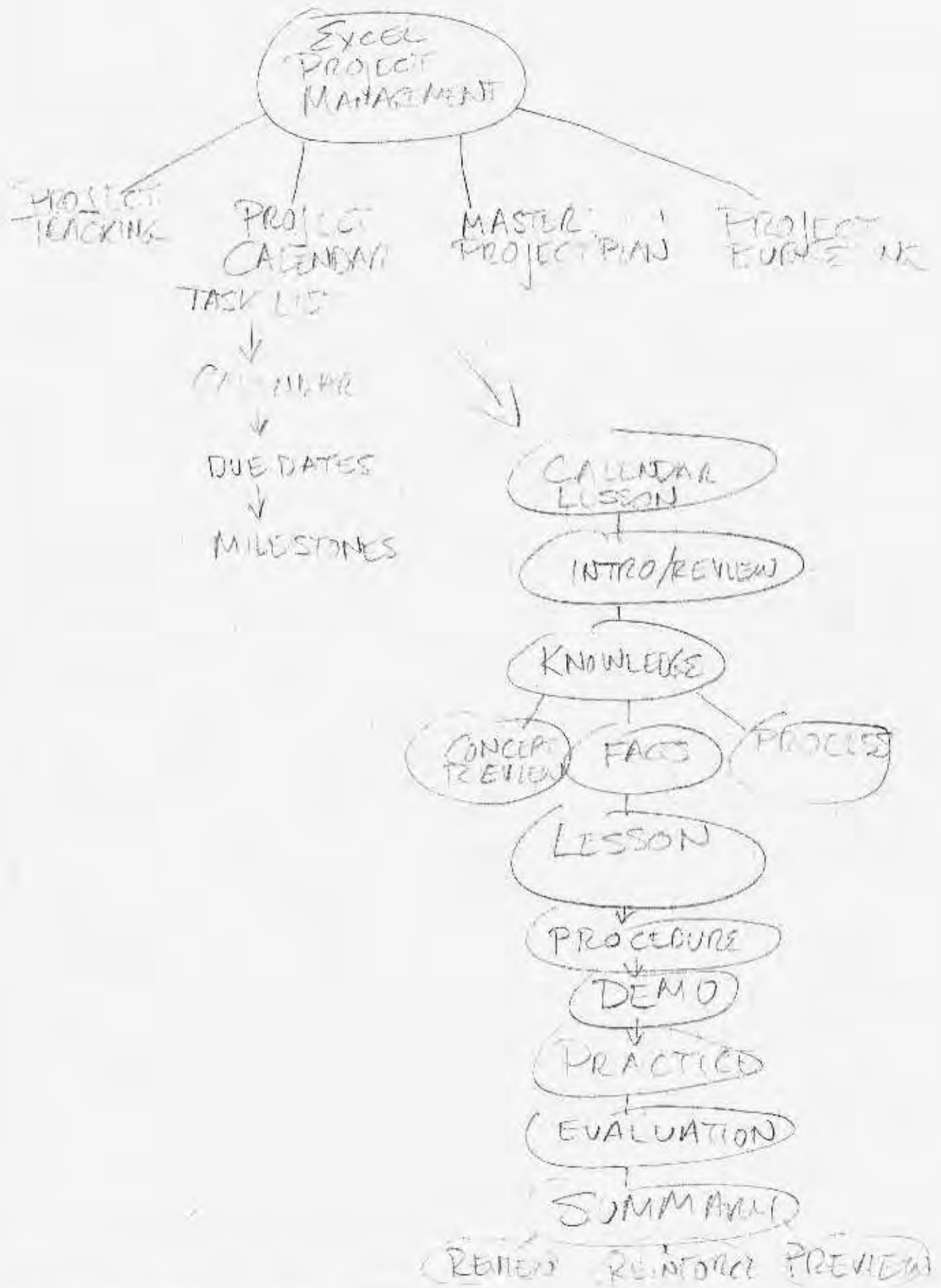


DEMO & CREATE
 FOR EACH LESSON 2-4
 IN THE MODULE

FOCUS ON THIS AREA FOR TEST EVAL

- LESSON 1
- EXECUTIVE REVIEW
- CREATE SCHEDULE
- POPULATE
- MANAGEMENT

- LESSON 2
- TASK
- CALENDAR
- DEMO (input tasks)
- LESSON 3
- MILESTONE (check for completion)
- LESSON 4
- DEPENDENCIES

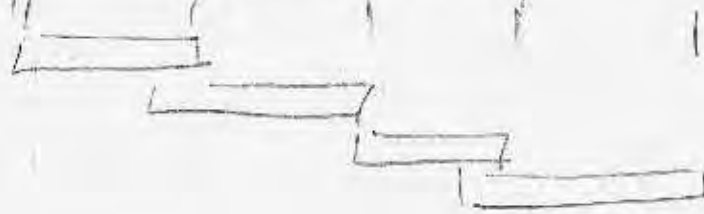


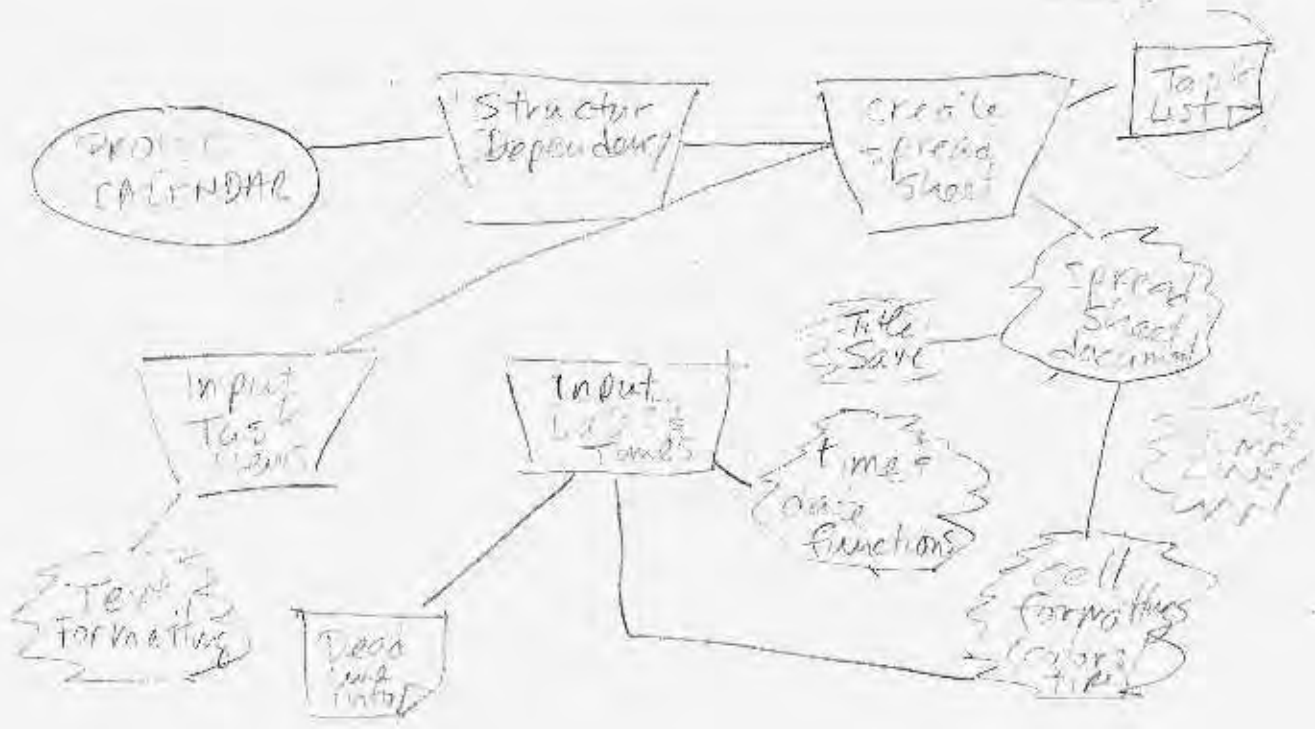
CALENDAR

SUN	MON	TUE	WED	THURS	FRI	SAT
	TASK 1		TASK 2			
		TASK 3		TASK 4		

MILESTONES

TASK 1
TASK 2
TASK 3
TASK 4





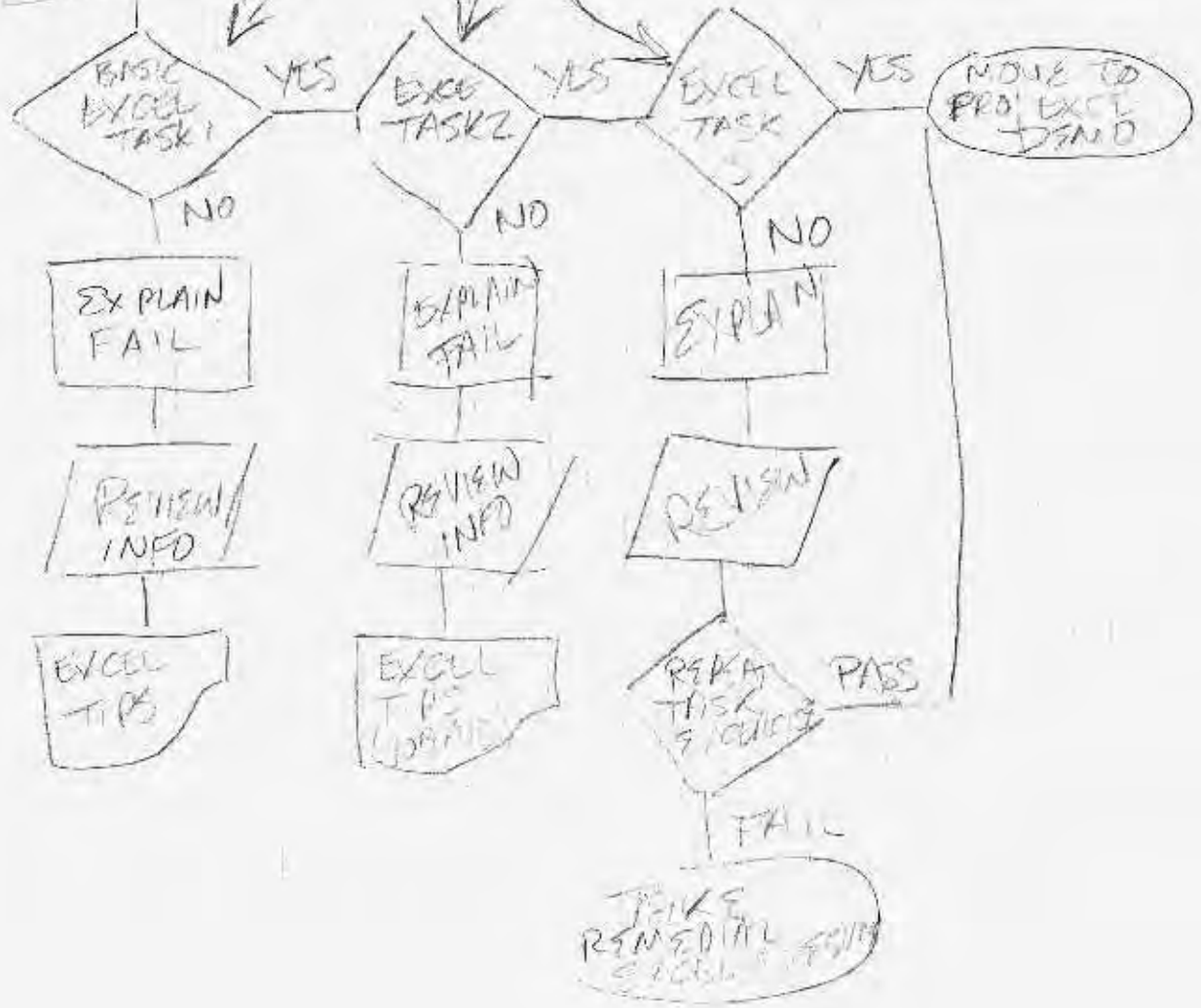
- INTRO
- Eap - Overview of Proj Mgmt
 - MO - importance of calendars in Proj Mgmt and that this lesson can show an easier way
 - out - lesson content will show you how to use Excel to perform Proj Mgmt functions
 - ES - Content - using excel
 - Eap - Excel Concept Overview
 - Les - Excel concept Quiz
 - FTO - Excel job aid
 - Les - Demo
 - Eed - Samples & Templates
 - Les - Learner-created calendar/timeline
 - IGO - Summary/Review
 - ntk - Preview next lesson
 - FBda - Evaluation

EXCEL BASICS REVIEW

TASKS COULD INCLUDE

IDENTICAL APPLIES TO PROJ MGMT

- DATA ENTRY
- FORMATTING
- FORMULAS
- SHORTCUTS
- LOCKING CELLS/SECURITY
- 10 PARTS OF SPREADSHEET



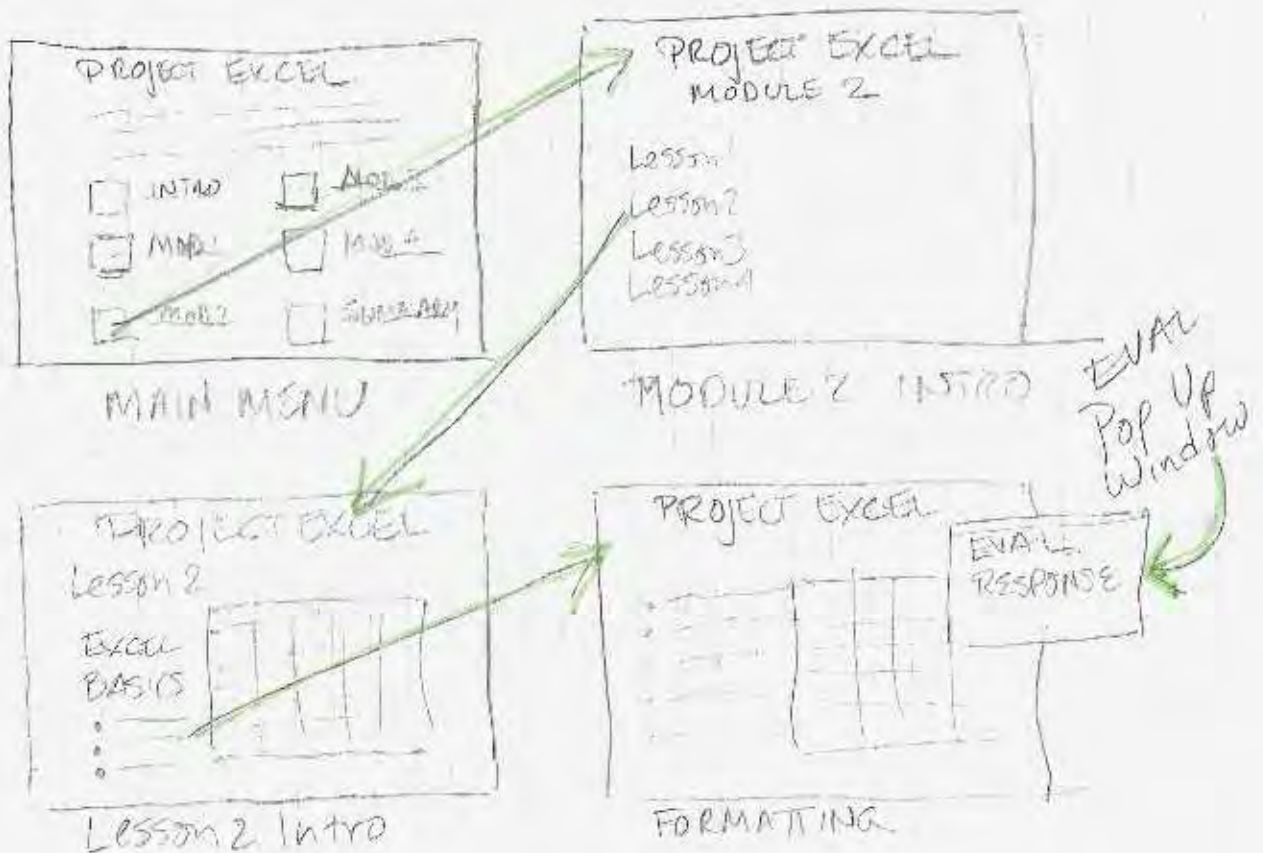
PROTOTYPING

KNOWN/FAMILIAR → NEW INFO
SIMPLE → COMPLEX
CONCRETE → ABSTRACT
SK. PICTURE → DETAILS

CONTENT & SEQUENCING

DESIGN & TYPE OF LEARNER CONTROL

TYPES OF INTERACTION



PROTOTYPE EVALUATION

General Reaction

Interview Questionnaire

H1 0 0 0 0 0 0 0 0

CONCEPTS { LIKED / DISLIKED
SATISFIED / DISSATISFIED
VERY GOOD / VERY BAD

ADJECTIVES { USEFUL / USELESS
HELPFUL / UNHELPFUL
CLEAR / UNCLEAR
INVITING / UNINVITING
SIMPLE / COMPLICATED

USABILITY QUESTIONS

What parts were unclear
Did you have questions that weren't answered
Where did you need more info

Testing Knowledge

Recall & use of info - probably not
practical for this level of evaluation

Attitude

May have to wait for complete document
but should include discussion about
attitude

COMPUTER SCREENS

Does user know:

- avail options
- how to navigate
- meaning of terms & icons
- where & when to input info
- activity status
- time remaining



GOALS • ACT 715
WHY • MEASUR

PROJECT EXCEL

INTRODUCTION

MODULE 1

MODULE 2

MODULE 3

MODULE 4

WELCOME

WELCOME TO
PROJECT EXCEL
TRAINING. WE'RE
HERE TO SHOW
YOU NEW WAYS
TO SIMPLIFY
YOUR JOB!



HELP

PREVIOUS

NEXT

OPENING SCREEN NOTES:

Test 1 (Proto? Paper)

Module labels don't mean anything
Should have descriptive labels

What is "Previous" Button for if this is 1st lesson

One tester did not like the idea of audio narration
because they had no way to listen in their
office

ACTIONS: Wanted to know how long the Modules would
take to complete

Removed "Previous" button, Added Module Topics

Test 2 - (Revised HTML Proto)

Buttons on bottom don't show on most
computer screens

Do you need the "Module" designation
or just have the topic

Need more direction on where to go,
how to start → proceed

STILL
NEED

more direction how to start

PROJECT: EXCEL

INTRODUCTION

CREATE YOUR OWN CALENDAR

MODULE 1

LESSON 1
OVERVIEW

MODULE 2

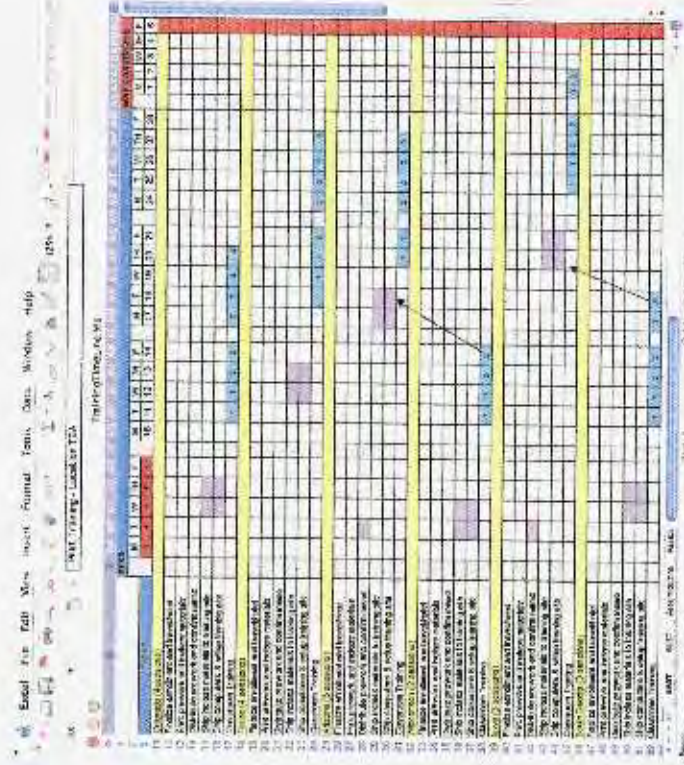
LESSON 2
EXCEL REVIEW

MODULE 3

LESSON 3
DEMO & PRACTICE

MODULE 4

LESSON 4
EVALUATION & REVIEW



HELP

PREVIOUS

NEXT

MODULE 2 INTRO SCREEN

Paper Proto

Needs more instruction where to go
Can't really see detail on screen

ACTIONS

Added description and link @ top

HTML Proto

Too much real estate for menus

Maybe use a sequenced time line to progress thru lessons

STILL NEEDED

More streamlined menus

could use flash or alternative for pull down menus

Incorporate a time line metaphor to move forward through module

PROJECT: EXCEL

INTRODUCTION

MODULE 1

MODULE 2

MODULE 3

MODULE 4

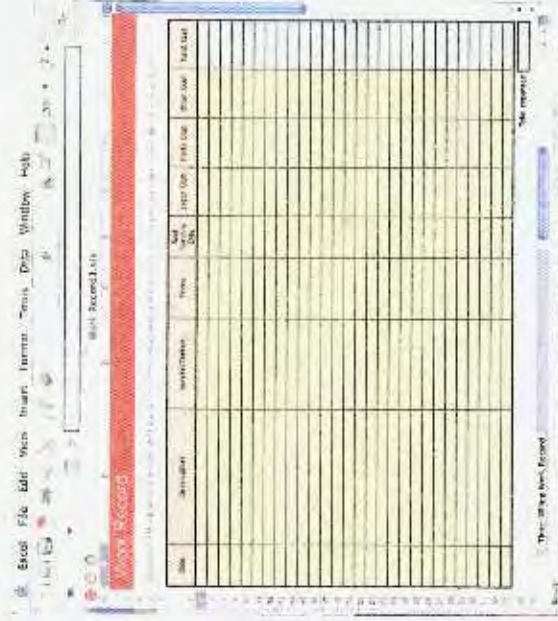
CREATE YOUR OWN CALENDAR

LESSON 1
OVERVIEW

LESSON 2
EXCEL REVIEW

LESSON 3
DEMO & PRACTICE

LESSON 4
EVALUATION VIEW



Place your mouse over different areas to see descriptions of key aspects of Excel

HELP

PREVIOUS

NEXT

Lesson 2 Intro Screen

Paper Proto

Need menu to direct to next part of lesson

ACTIONS: ~~What are the lesson topics~~
~~How does this relate to project mgmt~~
more expansion for how this relates to project r
Added another simulated pull down for lesson contents

HTML Proto

Bottom Buttons cut off

Would be nice to have some mechanism where the excel sheet takes up whole screen while you're exploring and then clicks away to reveal menus & then lesson again

Still
Need

Better menu structure

Look for better way to interact/
simulate excel content

PROJECT: EXCEL

INTRODUCTION

MODULE 1

MODULE 2

MODULE 3

MODULE 4

CREATE YOUR OWN CALENDAR

LESSON 1
OVERVIEW

LESSON 2
EXCEL REVIEW

Data Entry

Formatting

Formulas

LESSON 3
DEMO & PRACTICE

LESSON 4
EVALUATION & REVIEW

Locate the menu where you would find controls for shading, outlining, and sorting/reordering cells.



HELP

PREVIOUS

NEXT

Lesson 2 - Formatting Section

Paper Proto

Not clear what you're supposed to do
Too many menus, etc (same as previous)

ACTIONS Changed wording from "Locate" to "Click on"

HTML Proto

Excl image needs to be bigger
Same as previous comments

Still
Need

More interactivity
Better menus
Progress indicator

PROJECT: EXCEL

INTRODUCTION

CREATE YOUR OWN CALENDAR

MODULE 1

LESSON 1
OVERVIEW

MODULE 2

LESSON 2
EXCEL REVIEW

MODULE 3

DISTRIBUTING
DRAFTING
SCHEDULES

MODULE 4

LESSON 3
DEMO & PRACTICE

LESSON 4
EVALUATION & REVIEW

THAT'S CORRECT!
YOU'VE COMPLETED
THE FIRST PART OF THE
PROJECT. WELL DONE!



HELP

PREVIOUS

NEXT

Lesson 2 Formatting Question Response

Paper Proto

Liked the idea of immediate response
verifying correct/incorrect answer
Not sure if pop-up would work w/
pop-up blockers

ACTIONS

HTML Proto

Would like to see some way to
tally total correct responses

STILL
NEED

Ne

PROJECT: EXCEL

INTRODUCTION

MODULE 1 Project Tracking

MODULE 2 Creating Timelines

MODULE 3 Master Planning

MODULE 4 Project Budgeting

WELCOME

This website is a rough prototype of a proposed instructional product.

It is designed to demonstrate some instructional, navigational and structural elements of the finished site for early user testing.

The only functional links are those for the Introduction, some of the 'Next' and 'Back' buttons, Module 2, Lesson 2 and 'Formatting' in Lesson 2.

"Welcome to Project Excel Training. We're here to show you new ways to simplify your job as a Project Manager."



This page is intended to include a brief audio introduction to using Excel as a project management tool.

HELP

NEXT >

PROJECT: EXCEL

INTRODUCTION

MODULE 1 Project Tracking

MODULE 2 Creating Timelines

MODULE 3 Master Planning

MODULE 4 Project Budgeting

Create Your Own Calendars & Timelines

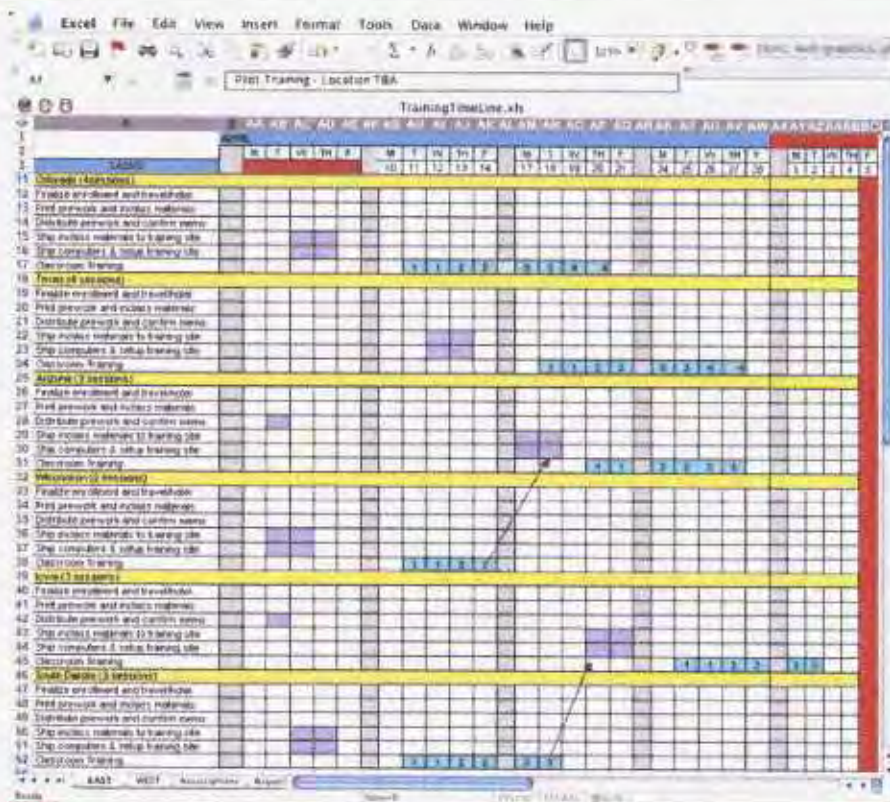
Lesson 1: Overview

Lesson 2: Excel Review

Lesson 3: Demonstration & Practice

Lesson 4: Evaluation & Review

Using Excel as a project management tool requires extensive use of Excel's data entry shortcuts, formatting capabilities and specialized time and date formulas. Review your knowledge in [Lesson 2](#) of this module.



[HELP](#)

[<BACK](#)

[NEXT >](#)

PROJECT: EXCEL

INTRODUCTION

MODULE 1
Project Tracking

MODULE 2
Creating Timelines

MODULE 3
Master Planning

MODULE 4
Project Budgeting

Create Your Own Calendars & Timelines

Lesson 1:
Overview

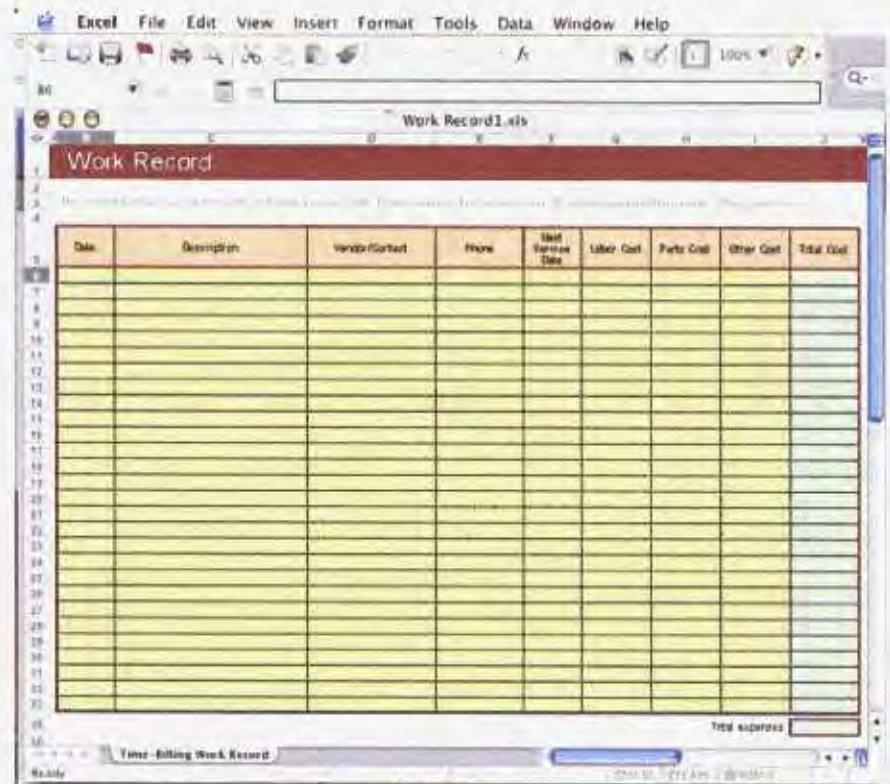
Lesson 2:
Excel Review

- Data Entry
- Formatting
- Formulas

Lesson 3:
Demonstration & Practice

Lesson 4:
Evaluation & Review

Excel enables you to turn a simple grid into a wide variety of documents that use color and format to aid you and your colleagues organize and manage data and projects. Place your mouse over different areas of the sample Excel document to see descriptions of various features and key formatting aspects of Excel. (function not currently enabled) Move on to the [Formatting Lesson](#) for more information.



HELP

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NEXT >



INTRODUCTION

MODULE 1
Project Tracking

MODULE 2
Creating Timelines

MODULE 3
Master Planning

MODULE 4
Project Budgeting

**Create Your Own
Calendars &
Timelines**

**Lesson 1:
Overview**

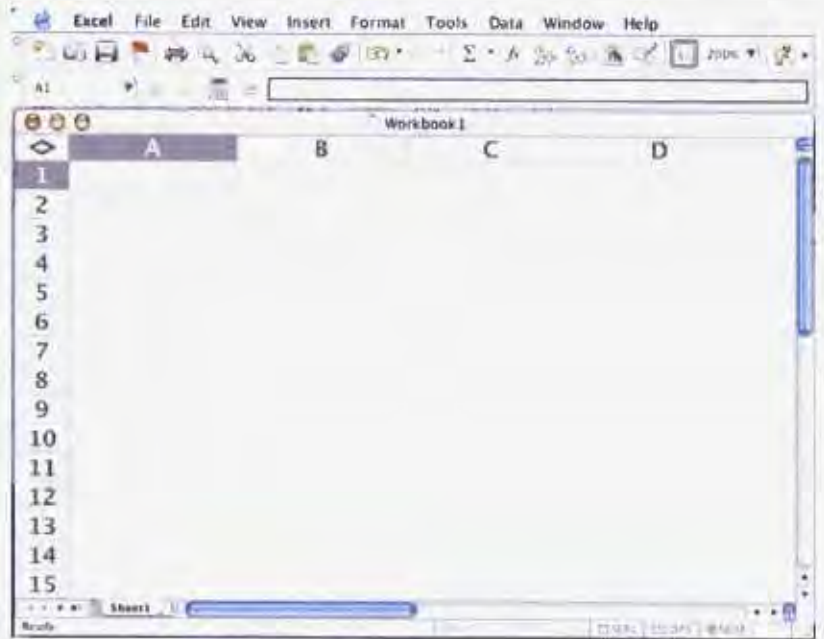
**Lesson 2:
Excel Review**

- Data Entry
- Formatting
- Formulas

**Lesson 3:
Demonstration &
Practice**

**Lesson 4:
Evaluation & Review**

Click on the menu where you would find controls for coloring, shading, highlighting or outlining specific areas or cells in the spreadsheet. (function not fully enabled)



HELP

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NEXT >



INTRODUCTION

MODULE 1
Project Tracking

MODULE 2
Creating Timelines

MODULE 3
Master Planning

MODULE 4
Project Budgeting

**Create Your Own
Calendars &
Timelines**

**Lesson 1:
Overview**

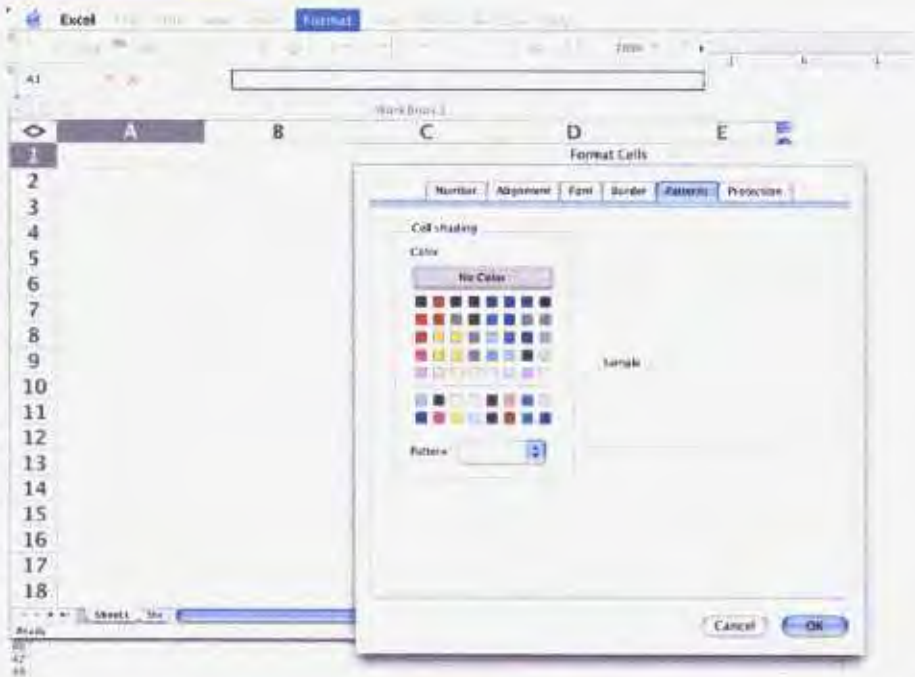
**Lesson 2:
Excel Review**

- Data Entry
- Formatting
- Formulas

**Lesson 3:
Demonstration &
Practice**

**Lesson 4:
Evaluation & Review**

That's Correct!
You've identified the cell shading menu that is used often when making project timelines.
(Pop-up window - function not fully enabled)



HELP

<BACK

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