Excel and MS Project for IT Project Management

18 – 22 October 2027
Washington DC (USA)



Excel and MS Project for IT Project Management

Ref: 322403_198157 **Date:** 18 – 22 October 2027 **Location:** Washington DC (USA) **Fees:** 5900 GBP

Excel and MS Project for IT project management is the joint use of a spreadsheet application and a scheduling application to plan, cost and follow software releases, sprints and infrastructure rollouts. This 1-week foundation course is for IT project managers and coordinators, and each delegate builds an integrated IT plan pack: an MS Project release schedule linked to an Excel budget and defect workbook. The subject is taught by Blackbird Training Centre.

Introduction

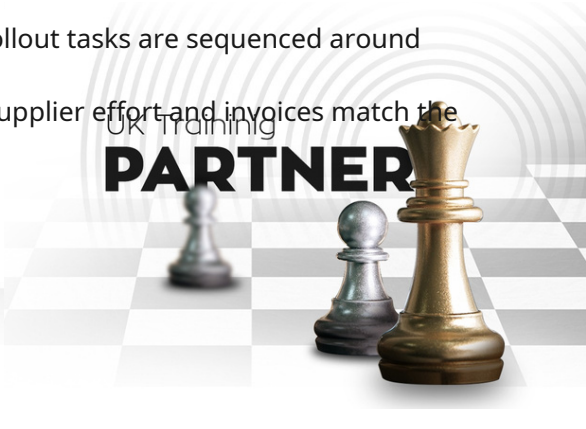
The course rests on three references. The PMBOK Guide of the Project Management Institute describes how schedules, resources and costs are planned. The Scrum Guide defines sprints, the fixed time-boxes in which software teams deliver increments. The ITIL 4 release management practice covers how changed services reach users. The level is foundation: no earlier MS Project experience is assumed. Teaching uses lab exercises and a case study following a banking software release and a hospital network upgrade.

Course Objectives

- Distinguish capital from operating expenditure in an IT budget for licences, hardware and cloud services.
- Compare waterfall phases with sprint time-boxes, and select the schedule structure in MS Project that fits a release or a rollout.
- Apply task links, calendars and resource assignments in MS Project to sequence build, test and deployment work.
- Interpret baseline against actual variance to explain schedule slippage and cost overrun to sponsors.
- Select spreadsheet functions and PivotTables that turn defect logs and vendor timesheets into a one-page status summary.
- Justify a go-live date by showing the dependencies, constraints and resource levels behind it.

Target Audience

- New IT project managers who must decide how to structure a release plan before committing to a go-live date.
- Project coordinators and PMO analysts in technology teams who must judge which figures belong in a weekly status summary.
- Scrum masters and delivery leads who must choose how sprints are shown in a schedule shared with sponsors.
- Infrastructure and network team leads who must decide how rollout tasks are sequenced around change freeze periods.
- IT vendor and contract coordinators who must judge whether supplier effort and invoices match the agreed plan.



Course Outline

Day 1: Spreadsheet Foundations for IT Budgets and Registers

- Workbook Structure vs Flat Lists: Organising IT Budget, Asset and Vendor Sheets
- Core Formulas: SUMIFS and Date Functions for Building a Release Calendar
- Formatting, Sorting and Filtering: Preparing Defect and Change Request Logs for Review
- Capital vs Operating Expenditure: Classifying Licence, Hardware and Cloud Costs
- IT Budget Workbook: Planned Spend, Committed Spend and Monthly Variance

Day 2: Analysing Defects, Vendors and Budgets in Spreadsheets

- PivotTables vs PivotCharts: Summarising Defect Counts by Severity and Module
- Data Validation vs Conditional Formatting: Controlled Entry and Highlighting Overdue Tickets
- VLOOKUP vs INDEX-MATCH: Joining Vendor Rates to Timesheets and Invoices
- Nested IF Logic: Flagging Service Level Agreement Breaches in Vendor Work Logs
- Status Summary Sheet: One-Page View of Budget, Open Defects and Milestones

Day 3: Scheduling Releases and Rollouts in MS Project

- MS Project Interface: Gantt Chart, Task Sheet and Timeline Views for IT Work
- Project Properties and Calendars: Start Date, Working Time and Change Freeze Periods
- Work Breakdown Structure: Splitting a Software Release Into Summary Tasks and Work Packages
- Finish-to-Start vs Start-to-Start Links: Sequencing Build, Test and Deployment Tasks
- Resource Sheet and Assignments: Developers, Testers, Engineers and Contractors on Tasks

Day 4: Sprints, Constraints and Cost Baselines in MS Project

- Waterfall vs Sprint Scheduling: Modelling Phased Rollouts and Two-Week Sprints in MS Project
- Task Constraints vs Deadlines: Fixing a Go-Live Date Without Breaking Schedule Logic
- Baselines and Status Updates: Recording Percent Complete and Remaining Work
- Resource Levelling: Resolving Overallocated Engineers Across Parallel Workstreams
- Cost Rates and Fixed Costs: Pricing Labour, Licences and Hardware Inside the Plan

Day 5: Integrated IT Rollout Plan in Practice

- Import vs Export Maps: Moving Task and Cost Fields Between MS Project and Excel
- Baseline vs Actual Variance: Analysing Release Slippage With PivotTables
- Custom Reports: Sponsor Views of Milestones, Costs and Open Defects
- Case Study: Infrastructure Rollout Plan With Vendor Work and Change Freezes
- Integrated IT Plan Pack: Final Schedule, Budget Workbook and Status Summary



Skills You Will Gain

- Work breakdown structure for software releases
- Task dependency types
- Resource levelling
- Schedule baseline and variance
- Capital and operating expenditure classification
- PivotTable summaries
- Lookup functions for vendor rates
- Field mapping between Excel and MS Project

Why Attend This Course

- From release plans kept as date lists to MS Project schedules where each date follows from linked tasks.
- From inconsistent defect and vendor logs to validated registers with fixed status and priority lists.
- From retyping figures between applications to a mapped import and export between MS Project and Excel.
- From an IT plan scattered across several files to an integrated IT plan pack: a release schedule, a budget workbook and a status summary.

Conclusion

At its core, the subject is pairing a scheduler with a spreadsheet so that an IT schedule, its costs and its open issues agree. The course makes three distinctions clear: waterfall phases against sprint time-boxes, task constraints against deadlines, and capital against operating expenditure. It suits IT project managers, coordinators and delivery leads at foundation level who run releases or rollouts and need a schedule and budget they can defend to sponsors.

Course FAQs

What is Excel and MS Project for IT project management?

It is the combined use of Microsoft Project to schedule IT releases, sprints and rollouts, and Excel to hold the budget, defect and vendor registers that sit beside that schedule, with figures moved between the two applications.

What is the difference between waterfall and sprint scheduling in MS Project for IT projects?

Waterfall scheduling plans sequential phases linked from design to deployment. Sprint scheduling divides delivery into fixed time-boxes, usually two to four weeks, with work chosen at the start of each sprint. MS Project can hold both in one plan.



Which standards does the Excel and MS Project for IT project management course follow?

It follows the PMBOK Guide for schedule, resource and cost planning, the Scrum Guide for sprint structure, and the ITIL 4 release management practice for the way releases reach live use.

Is the Excel and MS Project for IT project management course right for a scrum master?

Yes. A scrum master learns to show sprints and release milestones in a schedule that sponsors can read, and to summarise backlog defects and team effort in spreadsheets.

What does a delegate produce in the Excel and MS Project for IT project management course?

Each delegate produces an integrated IT plan pack for a case study: an MS Project schedule for a release or rollout, a linked Excel budget and defect workbook, and a one-page status summary for sponsors.

