

Unit Title:	Project management software
OCR unit number:	57
Level:	3
Credit value:	5
Guided learning hours:	40
Unit reference number:	H/502/4620

Unit purpose and aim

This is the ability to use a software application that plans, organises and monitors completion of the component tasks within a project in logical sequence, given constraints of people and resource availability. This is not about managing a project although these standards may also be applicable to the project manager.

This unit is about the skills and knowledge required by an IT User to select and use a wide range of advanced project management software tools and techniques to input and modify complex information to support the planning and management of multiple projects.

Project management tools and techniques at this level will be described as advanced because:

- the software tools and functions used will be complex and at times require the user to search for and apply a solution or alternative approach by exploring technical support, or self-teaching;
- approaches to the inputting, manipulating and outputting of information will be complex, and will involve research, identification and application; and
- the user will take full responsibility for inputting, structuring, editing and managing the information within the software package.

Learning Outcomes	Assessment Criteria	Examples
<p>The learner will:</p> <p>1 Create and define a project</p>	<p>The learner can:</p> <p>1.1 Explain the critical information about the project that must be included</p> <p>1.2 Create, store and retrieve project management files in line with local guidelines where applicable</p> <p>1.3 Define the project file properties and project options</p> <p>1.4 Create master and sub-projects</p> <p>1.5 Create links across projects and manage</p>	<p>Project information Tasks, timescales, resources, stages, constraints; Source of information: provided by the person responsible.</p> <p>Store and retrieve Save, save as, find, open, close; important project information</p>

Learning Outcomes	Assessment Criteria	Examples
<p>2 Enter and edit information about project tasks and resources</p>	<p>changes to linked tasks</p> <p>2.1 Identify the critical tasks and milestones to be completed</p> <p>2.2 Explain how to set up any deadlines and constraints which apply to the project</p> <p>2.3 Enter and edit information about project tasks</p> <p>2.4 Explain how to resolve issues of resource availability and utilisation</p> <p>2.5 Enter and edit information about resources to be used in the project</p> <p>2.6 Create and apply a task calendar for scheduling tasks</p> <p>2.7 Identify and resolve any issues of resource allocation</p> <p>2.8 Define and set up dependencies between tasks</p>	<p>Types of tasks Fixed cost, fixed duration, fixed work, critical, recurring</p> <p>Task information Duration, status, set reminders, priority, assign resources, constraints, deadlines, outlines, recurrence, custom fields</p> <p>Resources People, time, costs, equipment, enterprise resources, shared resources</p> <p>Task Calendar Working-time calendar, holidays, customise, charts (e.g. Gantt chart)</p>
<p>3 Update information about project progress</p>	<p>3.1 Explain the methods available to track project progress and review against plans</p> <p>3.2 Use editing and formatting techniques to update project elements</p> <p>3.3 Update task status in line with progress</p> <p>3.4 Update information about resources as required</p> <p>3.5 Compare actual progress with project baseline and reschedule uncompleted tasks</p> <p>3.6 Identify and assess the impact of risks and issues on the project</p> <p>3.7 Manage information on project risks and issues</p>	<p>Task status Complete, in progress, not started, percentage, tasks behind schedule, postpone tasks</p> <p>Risks and issues Contingency plans, mitigation, associate with tasks or resources, alerts</p>
<p>4 Select and use appropriate tools and techniques to display and report on project status</p>	<p>4.1 Create and customise project reports to meet needs</p> <p>4.2 Use filtering and formatting techniques to display project</p>	<p>Project reports Task Progress, project progress, resource allocation and usage, costs</p> <p>Display project information Task lists, resource assignment,</p>

Learning Outcomes	Assessment Criteria	Examples
	<p>information to meet needs</p> <p>4.3 Share project information with other applications</p>	<p>project costs, critical path</p>

Assessment

All ITQ units may be assessed using any method, or combination of methods, which clearly demonstrates that the learning outcomes and assessment criteria have been met. Assessments must also take into account the additional information provided in the unit Purpose and Aims relating to the level of demand of:

- the activity, task, problem or question and the context in which it is set;
- the information input and output type and structure involved; and
- the IT tools, techniques or functions to be used.

See the Assessment and postal moderation section of the [ITQ Centre Handbook](#).

Evidence requirements

Candidates must complete the Evidence Checklist for this unit without any gaps. Individual unit checklists are available to download from the qualification [webpage](#) (see forms).

Guidance on assessment and evidence requirements

Please refer to the ITQ centre handbook on our [webpage](#).

Details of relationship between the unit and national occupational standards

This unit maps fully to competences outlined in IT User National Occupational Standards version 3 (2009).