

## Course Syllabus

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# Configuring and Administering Microsoft Project Server 2003

## Course Overview

Project Server administrators taking this course learn how to properly configure and maintain Project Server 2003 using both Microsoft Project Professional and the Project Web Access interface.

## Target Audience

This course applies to both technical and non-technical Project Server administrators, and is tailored to the business application owner who serves as the organization's primary or backup business application administrator. Although having an IT background knowledge base is helpful, it is not a requirement for students to be able to master the content in this course.

## Pre-Requisites

None

## Learning Objectives

After completing this course, you will be able to:

- Describe the project communication life cycle used with Project Server
- Describe the technologies and architecture used in Project Server
- Configure custom enterprise fields, outline codes, and calendars in the Enterprise Global file
- Add resources to the Enterprise Resource Pool
- Understand the administration interface in Project Web Access
- Set the initial configuration options for Project Server
- Configure Project Server security using Groups and Categories
- Import enterprise templates and existing projects into Project Server
- Properly use Administrative projects

- Build the OLAP Cube and resource availability information
- Create custom views in both Project Web Access and Microsoft Project Professional
- Manage Windows SharePoint Services
- Manage the day-to-day operations Project Server, including checking in projects and cleaning up the Project Server database

## Topical Outline

### **Module 1: Introducing Microsoft Project Server**

What Is Microsoft Project Server?

*Applying Enterprise Project Management Terminology to Microsoft Project Server*

Understanding Project Server's Language

*Enterprise Project*

*Enterprise Resource*

*Check In and Check Out*

Using Project Server's Enterprise Resource Management Tools

Understanding the Project Communication Life Cycle in Project Server

*Additional Collaboration and Management Tools*

Understanding the Windows SharePoint Services Role with Project Server

Understanding Publishing in Project Server

Understanding Analysis Tools

*Portfolio Modeling*

### **Module 2: Project Server Architecture**

Understanding the Project Server System Software Environment

*End User Software*

*Server Software*

*Database Software*

Understanding Project Server Physical Environments

*The Microsoft Office Connection*

*Understanding Server Requirements, Scalability, and Availability Options*

*Understanding Client Requirements*

### **Module 3: Project Server Configuration in Microsoft Project Professional**

Logging Into Project Server through Microsoft Project Professional 2003

Enterprise Global Overview

Checking Out the Enterprise Global

*Backing Up and Restoring the Enterprise Global*

Understanding Custom Fields and Custom Outline Codes

*Why Enterprise Fields and Outline Codes Are Important to You*  
*Enterprise Field and Outline Code Types*

Defining Enterprise Fields

*Using Formulas to Display Calculated Data in Custom Fields*  
*Understanding Rollup Methods for Enterprise Custom Fields*  
*Displaying Graphical Indicators in Custom Fields*

Defining Enterprise Outline Codes

*Sharing another Field's Outline Code*  
*Deleting a Custom Field or Outline Code*

Setting Up Skill Codes and Other Resource Keys

*Using Multi-Value Enterprise Resource Outline Code Fields*  
*Setting Up the RBS Field (Enterprise Resource Outline Code 30)*

The Publishing Process and Enterprise Custom Fields

Setting Default Working Times for the Enterprise

*Creating New Base Calendars*  
*Warning: Synchronizing the Working Time with the Project Calendar*

Setting a Standard Currency for the Enterprise

## **Module 4: Building and Managing the Enterprise Resource Pool**

Enterprise Resource Pool Overview

*Enterprise vs. Local Resources*

Understanding Enterprise Resource Types

Creating Enterprise Resources

*Creating Work Resources*  
*Creating Material Resources*  
*Creating Generic Resources*

Editing Existing Resources in the Enterprise Resource Pool

Adding New Enterprise Resources through Active Directory Synchronization

Preparing to Import Enterprise Resources

*Importing Resources from Active Directory*  
*Importing Resources from Your Address Book*  
*Verifying a Windows Account for a Resource*  
*Preparing Custom Fields and Outline Code Data*

Importing Enterprise Resources

Deactivating an Enterprise Resource

## **Module 5: Using Project Web Access for Configuration and Administration**

Using the Project Web Access User Interface

*Menu Bar*

*Actions Pane*

*Customization Tabs*

*Action Bar*

*Manipulating the Data Grid*

*Printing the Data Grid*

*Exporting the Data Grid to Excel*

Project Web Access Administration Interface

## **Module 6: Initial Project Server Configuration in Project Web Access**

Overview: Setting Application Options

Setting Options for Enterprise Features

*Specifying the Project Server Mode*

*Selecting Project Web Access Features*

*Entering Project Server Base URLs*

Configuring Alerts and Reminders

Configuring Project Web Access Menus

Setting Options for OLAP and Resource Availability Tables

Setting the Default Method for Tracking Progress

*Default Method for Reporting Progress*

*Locking Down Defaults*

*Specifying Time Period Settings*

*Defining Current Tasks*

*Tips for Using the Percent of Work Complete Method of Tracking*

*Tips for Using the Actual Work Done and Work Remaining Method of Tracking*

*Tips for Using the Hours of Work Done Per Day or Per Week Method of Tracking*

Adding Custom Home Page Content

Establishing Project Versions

Specifying User Authentication and Password Length

## **Module 7: Configuring Project Server Security using Categories and Groups**

Overview of Project Server Security

Global Permissions Essentials

Setting Global Permissions (Features)

Overview: Controlling Permissions with Groups and Categories

*Understanding Categories*

*Understanding Groups*

*Understanding the Interaction between Categories and Groups*

Managing Security through Categories

*Creating a New Category*

Summary of Default Category Settings

*My Direct Reports*

*My Organization*

*My Projects*

*My Resources*

*My Tasks*

Managing Permissions with Groups

*Creating a New Group*

Setting Permissions with Security Templates

Managing Active Directory Synchronization for Groups

Managing User Accounts

*Adding or Modifying Users*

*Clearing the Active Directory Globally-Unique Identifier*

How Do I...?

## **Module 8: Building and Managing the Project Environment**

Overview of the Project Environment

Importing Projects

Controlling the Project Environment with Templates

*Creating an Enterprise Template*

Determining Timesheet (Published) Fields

Using Administrative Projects

*Creating an Administrative Project*

*Collaborating on an Administrative Project*

*Considerations for Using Administrative Projects*

Building the OLAP Cube and Publishing Resource Availability

## **Module 9: Creating and Modifying Project Server Views**

Overview: Creating Views

Creating Gantt Chart Formats

Creating Grouping Formats

Managing Project Web Access Views

*Deleting Views*

*Copying and Modifying Views*

Creating Custom Views in Project Web Access

- Creating a Custom Project View*
- Creating a Custom Project Center View*
- Creating a Custom Assignment View*
- Creating a Custom Resource Center View*
- Modifying the Timesheet View*

Creating a Custom Portfolio Analyzer View

- Using the Portfolio Analyzer Toolbars*
- Tips for Using the Portfolio Analyzer*

Getting Additional Views

Managing Enterprise Views in Microsoft Project Professional

Create a New View Using the 4-Step Method

- Select or Create a Table*
- Select or Create a Filter*
- Select or Create a Group*
- Create the New Custom View*

Creating an Enterprise Cost View

- Select or Create a Table*
- Select or Create a Filter*
- Select or Create a Group*
- Create the New View*

Creating an Enterprise Resource Sheet View

Moving Objects In and Out of the Enterprise Global Using the Organizer

## **Module 10: Managing Windows SharePoint Services**

Overview: Managing Windows SharePoint Services

- What is Windows SharePoint Services?*

Managing WSS Connections

Managing WSS Site Provisioning Settings

Managing WSS Sites

Using Site Administration for a WSS Site

- Using the Administration Options*
- Using the Customization Options*
- Using the Manage My Information Options*

Synchronizing Web Administrator Accounts

Connecting to a SharePoint Portal Server

Using WSS Central Administration

- Getting More Information about WSS*

## **Module 11: Managing Project Server**

Checking in Enterprise Projects and Resources

*Checking In Enterprise Projects and Resources in the SQL Server Database*

Cleaning Up the Project Server Database

*Deleting Projects*

*Deleting Resources*

*Deleting Task Assignments*

*Deleting Resource Task Updates*

*Deleting Status Report Responses*

Monitoring Project Server Licenses

Monitoring Your Project Server