

Course Syllabus

Managing Enterprise Projects from Foundation to Enterprise using Microsoft Project Server 2003

Course Overview

This accelerated three-day course covers Microsoft Office Project 2003 basics, as well as how to use Microsoft Office Project 2003 with Microsoft Office Project Server 2003 to manage enterprise projects. Normally a four-day learning track, our condensed course teaches you how to use Microsoft Project Professional and Microsoft Project Server through each stage of the project management life cycle.

Target Audience

This course is a must for anyone who serves as a project manager or a portfolio manager in an enterprise project management environment. This three-day course is in lieu of taking both the Establishing a Project Management Foundation and Managing Enterprise Projects using Microsoft Project Server 2003 two-day courses.

Pre-Requisites

Although not required, it is helpful for students to have hands-on project management experience and knowledge of project management principles.

Learning Objectives

After completing this course, you will be able to:

- Describe the stages of the project management process
- Describe the project communication life cycle used with Project Server
- Understand the Microsoft Project user interface
- Understand the Microsoft Project Data Model as it relates to Views, Tables, Filters, and Groups
- Define and save a new enterprise project, open an enterprise project, and work with offline projects

- Perform basic task planning and understand how to properly use task dependencies and task constraints
- Add resources to a project team, assign resources to tasks, and level overallocated resources
- Save a baseline for a project
- Publish projects and task assignments
- Understand and use the Project Web Access user interface
- Track and update project progress
- Use Outlook to track task progress
- Analyze project variance
- Set up e-mail notifications and reminders from Project Server
- Manage risks, issues, and documents associated with a project
- Create and manage Status Reports
- Access resource information and project portfolio information through Project Web Access
- Perform portfolio analysis using the Portfolio Analyzer and the Portfolio Modeler

Topical Outline

Module 1: Project Management Overview

Project Management Theory

The Project Management Process

Definition

Planning

Execution

Control

Closure

Module 2: 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 Communications 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

Understanding Enterprise Global Concepts

Opening the Enterprise Resource Pool

Understanding Custom Outline Codes and Custom Fields

Why Enterprise Fields and Outline Codes Are Important to You

Enterprise Field and Outline Code Types

Understanding Tracking Method Settings

Default Method for Reporting Progress

Lock Down Defaults

Managed vs. Non-Managed Time Periods

Define Current Tasks

Module 3: Microsoft Project 2003 Overview

Introducing the Global.mpt File

The Startup Task Pane

Microsoft Project Help

The Project Guide

The Planning Wizard

Navigating in Microsoft Project 2003

Use the Scroll Bars

Use the Zoom In and Zoom Out buttons

Use the Go to Selected Task button

Screen and Tool Tips

The Three-Tiered Timescale Bar

Module 4: Inside Microsoft Project 2003

YJTI Process (Your Job – Tool's Job)

Microsoft Project Data Model

Understanding Views

Understanding Tables

Understanding Filters

Understanding Groups

Single-Pane Views

Combination Views

Module 5: Creating Enterprise Projects

Creating an Enterprise Project

Module 6: Project Definition

The Need for a Project Definition Process

Project Definition in Microsoft Project 2003

Step #1 – Set the Project Start Date

Step #2 – Enter Properties

Step #3 – Display the Project Summary Task

Step #4 – Set the Project Calendar and Nonworking Time Calendar

Step #5 – Set Options Unique To This Project

Step #6 – Save the Project

Module 7: Creating Enterprise Projects

Opening and Closing Project Plans

Working with Offline Projects

Importing Projects

Module 8: Project Planning – Tasks

The Task Planning Process

Creating a Task List Manually

Using a Template

Planning for Non-Deliverable Tasks

Basic Task Skills

Entering and Editing Tasks

Moving Tasks

Inserting Tasks

Deleting Tasks

Creating the Work Breakdown Structure (WBS)

Creating Milestones

Creating Recurring Tasks

Adding Task Notes

Setting Task Dependencies

Lag Time

Lead Time

Setting Task Constraints

Task Notes on Constraints

Constraints: Flexible and Inflexible

Planning Wizard Message Regarding Constraints

Setting Task Deadline Dates

Missed Deadlines and Constraints

Module 9: Building Project Teams, Assigning Resources and Leveling Assignments

Building a Team

Proposed vs. Committed Booking

Using Filters in the Build Team Dialog

Using Grouping

Selecting Resources for Your Team

Viewing Resource Information

Using Local Resources in an Enterprise Project

Module 10: Project Planning - Assignments

Task and Resource Assignments

Identifying Resource Capabilities

Estimating Task Effort

Resource Assignments: A Best Practice

Assigning Resources in the Task Entry View

The Duration Equation

Microsoft Project "Task Types"

Assigning Resources in the Assign Resources Dialog

Assigning Material Resources to a Task

Using Effort-Driven Scheduling

Using Resource Substitution

Module 11: Building Project Teams, Assigning Resources and Leveling Assignments

Using the Resource Substitution Wizard

Running the Wizard

Leveling Overallocated Resources

Overallocation Defined

Resource Leveling Defined

Basic Leveling Techniques

Assigning Leveling Priorities to Tasks

Module 12: Project Execution

Project Execution Defined

What is a Baseline?

Saving a Project Baseline

Viewing the Project Baseline

Clearing the Project Baseline

Module 13: Publishing and Republishing Work Assignments

Understanding Project Server Publishing

Controlling Default Publishing Behavior

Publishing: Best Practices

Publishing Assignments and Project Information

Republishing Assignments

Understanding the Project Server Spooler

Requesting Task Progress Outside the Normal Flow

Determining Timesheet (Published) Fields

Module 14: Project Web Access Overview

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

Module 15: Tracking Progress through Project Web Access

Working with Tasks in Project Web Access

Understanding the Timesheet

Timesheet indicators

Understanding the Timesheet Toolbar

Activities Available from the Actions Pane

View Options

Filtering, Grouping and Searching the Timesheet View

Displaying the Gantt Chart View

Current Tasks vs. All Tasks

Reporting Progress in the Timesheet

Setting Up the Timesheet to Enter Actuals

Entering and Submitting Progress

Using Other Task Activities

Rejecting a Task

Delegating a Task

Creating a New Task

Assigning Yourself to an Existing Task

Hiding Tasks

Inserting Task Notes

Linking Documents to Tasks

Linking Issues to Tasks

Linking Risks to Tasks

Managing Project Tasks in Outlook
Notifying Managers of Working Day Changes

Module 16: Working with Outlook

Managing Project Tasks in Outlook
Automatically Import Project Tasks into Outlook
Displaying Project Web Access in Outlook

Module 17: Updating Progress through Project Web Access

Applying Updates in Project Web Access
Setting View Options
Setting Filter, Group, Search Options
Accepting and Rejecting Updates
Rescheduling Uncompleted Work
View History of Past Task Changes
Setting Rules for Accepting Task Updates
Timesheet Approval
Viewing Unsubmitted Timesheets
Axioms for Success with Tracking

Module 18: Variance Analysis

Variance Defined
Types of Variance
Actual and Estimated Variance
Locating Variance in Microsoft Project 2003
Work Variance
Cost Variance
Date Variance

Module 19: Plan Revision

Using the Tracking Gantt View

Module 20: Using the Home Page

Using Features from the Home Page
Changing Your Password
Setting Alerts and Reminders for Yourself
Setting Reminders for your Resources
Taking Project Web Access Offline

Module 21: Working with Risks, Issues, and Documents

Working with Risks, Issues, and Documents

Working with Risks

Viewing Risks

Creating and Editing Risks

Attaching Risks to Tasks, Issues, Documents, and Other Risks

Working with Issues

Viewing Issues

Creating and Editing Issues

Attaching Issues to Other Issues, Tasks, Risks, and Documents

Working with Document Libraries

Viewing Document Libraries

Creating a New Document Library

Using a Document Library

Uploading Documents to a Library

Creating a New Document in a Library

Creating a New Folder in a Library

Working with Existing Documents in a Library

Viewing Document Properties

Editing Document Properties

Editing in a Microsoft Office Application

Deleting a Document

Checking Out/Checking In a Document

Working with the Versions History

Discussing a Document

Using the Project Workspace

Discussing a Document

Module 22: Working with Advanced Features of Risks, Issues, and Documents

Using Actions Pane Features

Viewing Reports

Setting Alerts

Exporting to an Excel spreadsheet

Modifying Settings and Columns

Modifying General Settings for Risks and Issues

Modifying General Settings for Documents

Modifying Columns Settings

Modifying Views

Synchronizing with Project Server

Module 23: Working with Status Reports

Requesting a Status Report

Creating a New Status Report Request

Editing and Deleting Status Reports

Responding to a Status Report Request

Submitting an Unrequested Status Report

Viewing the Status Reports Archive

Viewing Status Report Responses

Viewing Unrequested Status Reports

Module 24: Working in the Resource Center

Using the Resource Center

Viewing Resource Availability

Editing Resource Details

Opening a Resource for Editing

Viewing Resource Assignments

Adjusting Actuals for Resources

Viewing the Timesheet Summary

Module 25: Working in the Project Center

Working in the Project Center

Accessing Risks, Issues, and Documents from the Project Center

Using Project Center Views

Building a Project Team

Editing Project Details and Opening Projects

Checking In Projects

Working with Detailed Project Views

Organizing Your Saved Links

Working with To-Do Lists

Module 26: Working with Project Server Analysis

The Need for Project Analysis

Using Portfolio Analyzer Views

Creating Custom Portfolio Analyzer Views

Additional Portfolio Analyzer Options

Tips for Using the Portfolio Analyzer

Using the Portfolio Modeler

Creating a New Model

Opening a Model

Modifying your Model

Analyze Your Model

Comparing Model