MS ProjectExperts

Course Syllabus

Managing Enterprise Resources using Microsoft Project Server 2003

Course Overview

The Resource Manager role in Enterprise Project Management (aka EPM) is the one of the least standardized roles across companies of all sizes. Designed to be tuned to company-specific requirements, the Managing Enterprise Resources using Microsoft Project Server 2003 course focuses on effective resource management using Microsoft EPM tools. From team-building tools, collaboration methods, to the nuances of using EPM tools to understand resource loading and availability, if you manage resources in an organization using Microsoft EPM, this course is for you.

Target Audience

Anyone who has direct reports, who is expected to manage resource allocations across projects in an organization using Microsoft EPM, and who does not otherwise manage projects should take this course.

Learning Pre-Requisites

Although not required, it is helpful for students to have experience using Microsoft Office Project 2003 or earlier versions.

Learning Objectives

After completing this course, you will be able to:

- Describe the project communication life cycle used with Project Server
- Add resources to a project team, assign resources to tasks, and level overallocated resources
- Publish and republish projects and task assignments
- Understand and use the Project Web Access user interface
- Track and update project progress
- Use Outlook to track task progress

- 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: 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

Opening and Closing Project Plans

Module 2: 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

Assigning Resources

Assign Resources Dialog
Task Entry View

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 3: 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 Microsoft Project Spooler

Module 4: 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 5: 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 6: Working with Outlook

Managing Project Tasks in Outlook

Automatically Import Project Tasks into Outlook

Displaying Project Web Access in Outlook

Module 7: Updating Progress through Project Web Access

Applying Updates in Project Web Access

Setting View Options
Setting Filter, Group, Search Options

Accepting and Rejecting Updates

View History of past task changes

Setting Rules for Accepting Task Updates

Timesheet Approval

Viewing Unsubmitted Timesheets

Axioms for Success with Tracking

Module 8: 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 9: 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 10: 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 11: 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 12: 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 13: 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