MS Project Experts

Course Syllabus

Managing Enterprise Projects using Microsoft Project Server 2003

Course Overview

Managing Enterprise Projects using Microsoft Project Server 2003 takes your Microsoft Project competency to the Enterprise level. The field of Enterprise Project Management (aka EPM) presents many new challenges, even for the experienced user of Microsoft Project. In this course, you learn through hands-on exercises how to use Project Server 2003 in a step by step process to manage enterprise projects effectively. Focusing on how to use Microsoft Project Professional 2003 and Project Web Access for project tracking and team collaboration, you learn everything from the basics of EPM tracking methods to the subtleties of mining information in the system.

Target Audience

Managing Enterprise Projects using Microsoft Project Server 2003 is the premier methodology-agnostic course for everyone who serves as a project manager, portfolio manager, or scheduler in an enterprise project management environment using the Microsoft EPM platform. This course is "must have" training for application administrators who support business users and maintain the Project Server application configuration. This course is highly recommended for technical administrators who support EPM platforms to provide for better end-user understanding and communication.

Pre-Requisites

Those serious about developing an expert-level competency for managing enterprise projects with the Microsoft EPM tool set should first complete the Establishing a Project Management Foundation using Microsoft Project 2003 course. For students with significant experience using Microsoft Project and substantial scheduling and tracking mastery, the pre-requisite course provides a great skills refresher, but you may treat this as optional.

Learning Objectives

After completing this course, you will be able to:

- Describe the project communication life cycle used with Project Server
- Create and save an enterprise project, and work with offline projects
- Add resources to a project team, assign resources to tasks, and level overallocated resources
- 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
- 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 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

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 2: Creating Enterprise Projects

Creating an Enterprise Project

Opening and Closing Project Plans

Working with Offline Projects

Importing Projects

Module 3: 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

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 4: 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 5: 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 6: 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 7: Working with Outlook

Managing Project Tasks in Outlook

Automatically Import Project Tasks into Outlook

Displaying Project Web Access in Outlook

Module 8: 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 9: 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 10: 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 11: 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 12: 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 13: 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 14: 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 15: 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 Models