

Course Syllabus

Mining Your Enterprise Portfolio using Microsoft Project Server 2003

Course Overview

This course gives managers and executives a thorough overview of Microsoft Office Project Server 2003, preparing them for the advent of Microsoft EPM in their organization's environment. After preparing managers for the new work flows and control systems, this course focuses is on information retrieval and data mining appropriate for planning and analysis.

Target Audience

Executives and managers working in an organization that uses Microsoft Office Project Server 2003 to manage its projects and/or work should take this course to become grounded in the process changes that an EPM system brings as well as to become skillful in retrieving data that will assist in their management decision making. This is a must for anyone with oversight responsibilities for a portfolio or program of projects in an enterprise project management environment who is not taking another course in the EPM Learning program.

Pre-Requisites

Students should be familiar with Microsoft Office applications such as Word and Excel. Experience with Excel Pivot tables is helpful but not required.

Learning Objectives

After completing this course, you will be able to:

- Describe the project communication life cycle used with Project Server
- Understand and use the Project Web Access user interface
- Track and update task progress in Project Web Access and in Outlook
- 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

Module 2: 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 3: 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

Module 4: Working with Outlook

Managing Project Tasks in Outlook

Automatically Import Project Tasks into Outlook

Displaying Project Web Access in Outlook

Module 5: 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 6: 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 7: 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 8: Working in the Project Center

Working in the Project Center

- Accessing Risks, Issues, and Documents from the Project Center*
- Using Project Center Views*

Working with Detailed Project Views

Organizing Your Saved Links

Module 9: 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*

Module 10: Working with the Portfolio Modeler

Using the Portfolio Modeler

Creating a New Model

Opening a Model

Modifying your Model

Analyze Your Model

Comparing Models