

Course Syllabus

Configuring and Administering Microsoft Project Server 2007

Course Overview

This in-depth 3-Day course for Project Server administrators is a hands-on course that walks you through the process of configuring a Project Server 2007 instance. You learn how to properly configure and maintain a live Project Server 2007 environment using both Microsoft Project Professional and Project Web Access interfaces as you configure your own server instance in our training environment. This class is led by instructors with real-world experience in deploying Project Server 2007 across many industries.

Each student receives the following:

- A copy of the 840-page *Implementing and Administering Microsoft Office Project Server 2007 Second Edition* which serves as both the course manual and a valuable reference book.
- Access to a fully functional individually provisioned Project Server instance. Students attending through Cyberspace have the option to use their own Project Server instance

For courses taken via Cyberspace, each participant must use his or her own computer to access the virtual training environment. A high-speed internet connection is recommended. Participants do not need to have Microsoft Project Professional or Project Server installed in order to participate in the hands-on exercises.

Target Audience

This course is a must for anyone who serves as an Enterprise Project Management Administrator. The 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. As there should be a minimum of two Administrators per Project Server Instance, it may be helpful to attend this course with a colleague.

Pre-Requisites

Although not required, it is helpful for students to have hands-on project management and Microsoft Project experience and knowledge of project management principles. We also recommend that every Project Server administrator take the course *Managing Enterprise Projects from Foundation to Enterprise using Microsoft Project Server 2007* to learn how an organization actually uses Project Server 2007.

Learning Objectives

After completing this course, you will be able to:

- Describe the project communication life cycle used with Project Server
- Understand the administration interface in Project Web Access
- Create a Project Server login account in Project Professional 2007
- Configure custom enterprise fields, Lookup Tables, and calendars
- Add resources to the Enterprise Resource Pool
- Specify the initial configuration options for Project Server
- Configure time and task tracking settings
- Configure Project Server security using Groups and Categories
- Import enterprise templates and existing projects into Project Server
- Build the OLAP Cube and resource availability information
- Create custom views in both Project Web Access and Project Professional 2007
- Manage Windows SharePoint Services and Project Workspaces
- Modify Project Web Access pages and create a new Project Workspace site template
- Manage the Project Server database, including checking in and backing up projects, and cleaning up the Project Server database

Topical Outline

Module 01: Microsoft EPM Platform Overview

Introducing the Microsoft 2007 EPM Platform

What is Microsoft Office Project Server 2007?

Applying EPM Terminology to Project Server

Understanding Project Server Terminology

Enterprise Project

Enterprise Resource
Check In and Check Out

Enterprise Resource Pool Overview

Enterprise Global Overview

What's New in Project Server 2007

Understanding the EPM Platform Technology Stack

Project Server Installation Types

Understanding Project Server Physical Environments

Understanding Databases in the Enterprise

Understanding the Project Communications Lifecycle

Collaboration and Management Tools Overview

Data Analysis Overview

Module 02: Post-Installation Steps

Verifying Project Server Functionality

Verifying Project Web Access Connectivity
Creating a Login Account in Project Professional 2007
Performing Basic Functional Tests

Module 03: Preparing to Configure Project Server

Understanding the Initial Configuration Process

Using the Project Web Access User Interface

Using the Quick Launch Menu
Using Context-Sensitive Menus
Using the Action Bar
Manipulating the Data Grid
Printing the Data Grid
Exporting the Data Grid to Excel

Using the Project Web Access Administration Interface

Module 04: Creating Custom Enterprise Fields and Calendars

Using Custom Enterprise Fields

Why Enterprise Fields Are Important
Understanding Enterprise Field Types

Creating and Modifying Lookup Tables

Creating a New Lookup Table

Modifying an Existing Lookup Table

Creating a Custom Field

Making Fields Required

Creating a Custom Field with a Lookup Table

Creating a Custom Field with a Formula

Displaying Graphical Indicators in Custom Fields

Deleting a Custom Field or Lookup Table

Modifying the Built-In Lookup Tables

Modifying the Cost Type Lookup Table

Modifying the Health Lookup Table

Modifying the RBS Lookup Table

Creating the Team Name Lookup Table

Planning for Matching Generic Resources

Creating Enterprise Calendars

Setting Company Holidays

Setting the Daily Working Schedule

Creating a New Base Calendar

Importing a Base Calendar from a Project

Module 05: Managing Enterprise Resources

Enterprise Resource Pool Overview

Understanding Enterprise vs. Local Resources

Understanding Enterprise Resource Types

Creating Work Resources

Entering General Information

Changing Working Time

Entering Cost Information

Entering Resource Notes

Using the Custom Fields Page

Creating Non-Work Resources

Creating Material Resources

Creating Generic Resources

Creating Cost Resources

Creating Team Resources

Editing Enterprise Resources

Using the Resource Center to Edit Enterprise Resources

Mass Editing Enterprise Resources

Bulk Editing Enterprise Resources

Individually Editing Enterprise Resources by Batch

Adding New Enterprise Resources Using 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 Field Data

Importing Enterprise Resources

Deactivating an Enterprise Resource

Module 06: Initial Project Server Configuration

Configuring Project Server 2007

Setting High-Level Enterprise Functionality

Specifying Enterprise Settings Options

Specifying Currency Settings Options

- Specifying Resource Capacity Settings
- Specifying the Resource Plan Work Day Option
- Specifying the Project State Field Option

Configuring Alerts and Reminders

Setting Options for the OLAP Cube

- Configuring the OLAP Cube

Configuring Event Handlers

Configuring the Quick Launch Menu

Module 07: Configuring Time and Task Tracking

Understanding Tracking

Defining Financial Periods

Defining Timesheet Periods

Configuring Timesheet Options

- Creating Duplicate Timesheet Lines
- Setting Timesheet Options

Configuring Administrative Time

Setting the Task Tracking Method

- Specifying the Tracking Method
- Locking Down the Tracking Method
- Setting the Reporting Display
- Protecting User Updates
- Defining a Current Task
- Enabling the Gantt Chart View

Tips for Using Tracking Methods

- Using Percent of Work Complete
- Using Actual Work Done and Work Remaining

Module 08: Configuring Project Server Security

Project Server Security Overview

Setting Organizational Permissions

Understanding Permissions

Controlling Permissions with Categories and Groups

Managing Security through Categories

- Creating a New Category
- Deleting a Category

Summary of Default Category Settings

- My Direct Reports
- My Organization
- My Personal Projects
- My Projects
- My Resources
- My Tasks

Managing Permissions with Groups

- Creating a New Group
- Deleting a Group

Using and Managing Security Templates

- Creating a New Security Template
- Deleting a Security Template

Managing AD Synchronization for Groups

Managing User Accounts

- Creating a New User Account
- Editing User Information
- Deactivating a User Account

How Do I...?

Module 09: Building the Project Environment

Building the Project Environment

Using Enterprise Project Templates

- Creating an Enterprise Project Template
- Creating a New Project from an Enterprise Project Template

Importing Projects and Templates

- Changing the Project Owner and Status Manager

Building the OLAP Cube

Module 10: Creating and Managing Views

Understanding Views

Creating Gantt Chart Formats

Creating Grouping Formats

Managing Project Web Access Views

- Copying and Modifying Views
- Deleting Views

Creating Custom Views in Project Web Access

- Creating a Custom Project View
- Creating a Custom Project Center View
- Creating a Custom Resource Assignments View
- Creating a Custom Resource Center View
- Modifying My Work Views
- Creating a Custom Resource Plan View
- Modifying a Team Tasks View
- Creating a Custom Team Builder View
- Modifying the My Timesheet View
- Creating a Data Analysis View

Understanding Enterprise Views in Project Professional 2007

- Working with the Enterprise Global File
- Adding Custom Views to the Enterprise Global
- Removing Pollution from the Enterprise Global

Using the 4-Step Method to Create a New View

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

Creating Enterprise Views You Can Use

- Creating an Enterprise Cost Variance View
- Creating an Enterprise Publishing View
- Creating an Enterprise Resource Sheet View

Module 11: Creating Data Analysis Views

Understanding OLAP Cubes

Creating a Custom Data Analysis View

- Understanding the PivotTable Field List Dialog
- Creating the PivotTable
- Formatting the PivotChart
- Using the Data Analysis Toolbars

Creating a Custom Calculated Total Field

Creating Useful Data Analysis Views

- Using the Assignment OLAP Cubes
- Using the WSS OLAP Cubes
- Using the Timesheet Cubes
- Using the Project OLAP Cube
- Using the Resource OLAP Cubes
- Using the Task OLAP Cube

Accessing a Data Analysis View

Module 12: Managing Project Server Day to Day

Supporting Project Server

Database Administration through PWA

- Checking in Enterprise Objects
- Deleting Enterprise Objects

Working with Administrative Backups

- Working with the Daily Backup Schedule
- Backing Up Enterprise Objects Manually
- Restoring Backed-up Objects

Configuring and Managing the Queue

- Understanding the Queue Process
- Understanding Job States
- Working with the Manage Queue Jobs Page
- Troubleshooting the Queue
- Configuring the Queue

Monitoring Project Server Licenses

Monitoring Project Server

Configuring a SQL Server Maintenance Plan

Module 13: Managing Windows SharePoint Services

Introducing Windows SharePoint Services

Managing the SharePoint/Project Server Connection

- Managing Project Workspace Provisioning
- Managing Project Workspaces
- Modifying Project Workspaces

Customizing SharePoint through Site Actions

Creating New Site Content

Modifying Site Settings

Introducing WSS Central Administration

Managing Operations

Managing Applications

SharePoint Central Administration Summary