

Course Syllabus

Managing Projects from Foundation to Enterprise using Microsoft Project Server 2007

Course Overview

This 4-Day course 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 2007 in a step by step process to manage enterprise projects effectively. Focusing on how to use Microsoft Project Professional 2007 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. You will interact with an instructor with real-world experience in deploying and using Project and Project Server 2007.

Each student receives the following:

- A copy of the 884-page *Managing Enterprise Projects using Microsoft Office Project Server 2007 Second Edition* which serves as both the course manual(s) and a valuable reference book
- A copy of the 132-page *What's New Microsoft Office Project 2007*

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 Server installed in order to participate in the hands-on exercises.

Target Audience

Managing Enterprise Projects from Foundation to Enterprise using Microsoft Project Server 2007 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 course *Ultimate Microsoft Project 2007 Exam Prep Boot Camp 70-632*. 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 stages of the project management process
- Understand the Microsoft Project user interface
- Understand the Microsoft Project Data Model as it relates to Views, Tables, Filters, and Groups
- Describe the project communication life cycle used with Project Server
- Understand and use the Project Web Access user interface
- Create Proposals, Activities, and Resource Plans
- 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
- Analyze the Critical Path and Task Drivers
- Save a baseline and publish a project
- Manage project Deliverables and Deliverable dependencies
- Track time and task progress
- Use Outlook to track task progress
- Approve and update time, task progress, and administrative time requests

MS Project Experts

- Analyze project variance, revise a plan, and manage project changes
- Report on project progress using Visual Reports
- Manage personal settings
- Work with Risks, Issues, and Documents in a Project Workspace
- Use other features of the Project Workspace, such as Calendars, Discussions, and Tasks
- Create and manage Status Reports
- Analyze resource availability and view resource assignments in the Resource Center
- View the project portfolio in the Project Center
- Perform portfolio analysis using Data Analysis views

Topical Outline

Module 01: Project Management Overview

What is a Project?

Understanding the Project Management Process

Definition

Planning

Execution

Control

Closure

Module 02: Microsoft Office Project 2007 Overview

Introducing the Global.mpt File

Navigating in Microsoft Office Project 2007

Tips for Using the Scroll Bars

Using the Zoom In and Zoom Out buttons

Using the Scroll to Task button

Using Screen Tips and Tool Tips

Understanding Gantt Chart Symbols

Reading a Gantt Chart

Understanding Gantt-Optimized Scheduling Benefits

Module 03: Inside Microsoft Office Project 2007

Understanding the Microsoft Project Data Model

Understanding Views

Using Single-Pane and Combination Views

Understanding Tables

Understanding Filters

Understanding Groups

Module 04: Introducing Microsoft Project Server

What Is Microsoft Office Project Server?

Understanding Project Management Theory

Understanding Enterprise Project Management Terminology

Understanding Project Server Terminology

Enterprise Project

Enterprise Resource

Check In and Check Out

Using Enterprise Resource Management Tools

Understanding the Communications Life Cycle

Additional Collaboration and Management Tools

Understanding Windows SharePoint Services

Understanding Project Server Databases

Understanding Project Server Data Analysis

Understanding Enterprise Global Concepts

Opening the Enterprise Resource Pool

Understanding Custom Fields

Understanding Tracking Methods

Defining a Current Task

Module 05: Preparing to Use Project Server

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

Creating a Login Account in Project Professional 2007

Module 06: Working with Proposals and Activity Plans

Understanding Proposals and Activity Plans

Creating a Proposal

Creating a Proposal from a SharePoint List

Editing an Existing Proposal

Creating an Activity Plan

Creating an Activity plan from a SharePoint List

Creating a Resource Plan

Building a Team on a Resource Plan

Reserving Resource Availability in a Resource Plan

Building a Team on a Proposal or Activity plan

Importing Resources from a Resource Plan

Manually Adding Resources to the Team

Assigning Resources to Tasks

Publishing a Proposal or Activity plan

Linking Documents to a Proposal or Activity plan

Module 07: Creating Enterprise Projects

Converting a Proposal to an Enterprise Project

Creating an Enterprise Project Using Project Professional 2007

Defining an Enterprise Project

Set the Project Start Date and Enterprise Field Values

Enter the Project Properties

Display the Project Summary Task

Set the Project Working Schedule

Set Options Unique to the Project

Save the Project

Understanding the Local Cache

Adjusting Local Cache Settings

Viewing Local Cache Contents

Cleaning Up the Local Cache

Resolving Local Cache Corruption

Opening and Closing Projects

Working with Offline Projects

Importing Projects

Module 08: Task Planning

Using a Task Planning Process

Understanding Change Highlighting

Planning Project Tasks

Entering and Editing Tasks

Moving Tasks

Inserting Tasks

Deleting Tasks

Creating the Work Breakdown Structure (WBS)

Creating Milestones

Adding Task Notes and Cell Background Formatting

Using Task Dependencies

Understanding Task Dependencies
Setting Task Dependencies
Removing a Task Dependency
Using Lag Time with Dependencies
Using Lead Time with Dependencies

Setting Task Constraints and Deadline Dates

Setting Constraints
Adding Notes on Tasks with Constraints
Setting Deadline Dates

Assigning Task Calendars

Estimating Task Durations

Module 09: Resource and Assignment Planning

Understanding Enterprise Resources

Building a Project Team

Filtering Resources in the Build Team Dialog
Grouping Resources in the Build Team Dialog
Viewing Resource Information in the Build Team Dialog
Adding Resources to Your Project Team
Matching and Replacing Resources in the Build Team Dialog
Using Proposed vs. Committed Booking
Using Local Resources in a Project Team

Assigning Resources Using the Task Entry View

Understanding the Duration Equation
Understanding Task Types
Understanding Effort Driven Scheduling

Assigning Resources Using the Assign Resources Dialog

Assigning Cost Resources

Assigning a Budget Cost Resource
Assigning an Expense Cost Resource

Using the Resource Substitution Wizard

Preparing a Project for the Resource Substitution Wizard
Running the Resource Substitution Wizard

Leveling Overallocated Resources

Using a Leveling Methodology
Leveling an Overallocated Resource
Viewing Leveling Results
Clearing Leveling Results
Setting Task Priority Numbers

Module 10: Project Execution

Analyzing the Critical Path

Understanding Task Drivers

Working with Project Baselines

Saving a Project Baseline
Saving Over a Previous Baseline
Clearing the Project Baseline

Understanding Publishing

Setting Publishing Options
Publishing an Enterprise Project
Changing the Status Manager for Task Assignments

Managing Project Deliverables

Adding a New Deliverable in Project Professional 2007
Adding a New Deliverable in Project Web Access
Updating Deliverables in Project Professional 2007
Adding a New Deliverable Dependency

Module 11: Tracking Time and Task Progress

Tracking Time in Project Web Access

Creating a New Timesheet
Understanding the My Timesheet Page
Entering Time in the Timesheet
Editing an Existing Timesheet
Submitting a Timesheet for Approval
Recalling a Submitted Timesheet
Deleting a Timesheet
Responding to a Rejected Timesheet
Planning Administrative Time
Creating a Surrogate Timesheet

Tracking Task Progress in Project Web Access

Understanding the My Tasks Page

Understanding the Assignment Details Page

Reporting Progress from the My Tasks Page

Reporting Progress from the Assignment Details Page

Importing Progress from the My Timesheet Page

Using Other Task Activities

Reassigning Work to Another Resource

Self-Assigning Team Tasks

Creating a New Task

Deleting Tasks

Creating a New Personal Activity Plan

Using the Task Center

Module 12: Working with Outlook

Installing the Outlook Add-In

Using the Outlook Add-in

Setting Outlook Add-in Options

Managing Project Tasks in the Outlook Calendar

Managing Project Tasks in the Outlook Tasks List

Module 13: Approving Time and Task Progress

Viewing Unsubmitted Timesheets

Viewing and Adjusting Submitted Timesheets

Adjusting Timesheet Updates

Approving Timesheets

Approving High-Level Timesheet Information

Approving Detailed Timesheet Information

Recalling an Approved Timesheet

Approving Administrative Time Requests

Viewing Task Updates

Approving Task Updates

Approving Task Updates in Project Professional 2007

Rescheduling Uncompleted Work in Past Reporting Periods

Updating Expense Cost Resource Information

Publishing the Latest Schedule Changes

Viewing the Task Updates History

Creating Rules for Accepting Task Updates

Closing Tasks to Update

Axioms for Success with Tracking Progress

Module 14: Variance Analysis and Plan Revision

Understanding Variance

Understanding Variance Types

Analyzing Project Variance

Analyzing Date Variance

Analyzing Work Variance

Analyzing Cost Variance

Revising a Project Plan

Potential Problems with Revising a Plan

Revising Deliverable Dates

Using a Change Control Process

Inserting New Tasks in a Project

Rebaselining Your Project

Backing Up an Original Baseline

Rebaselining Only Unstarted Tasks

Module 15: Project Reporting

Using Visual Reports

Viewing a Visual Report

Customizing a Microsoft Office Excel 2007 Visual Report

Customizing a Microsoft Office Visio 2007 Visual Report

Saving Local OLAP Cube Data

Creating Visual Report Templates

Editing Visual Report Templates

Managing Your Visual Report Templates

Module 16: Managing Personal Settings

Personal Settings Overview

Changing Your Password

Managing Alerts and Reminders for Yourself

Managing Alerts and Reminders for Your Resources

Managing My Queued Jobs

Module 17: Working with the Project Workspace

Understanding the Project Workspace

Managing Risks

Creating a New Risk

Working with Existing Risks

Restoring a Deleted Risk from the Recycle Bin

Managing Issues

Creating a New Issue

Working with Existing Issues

Viewing Your Assigned Issues and Risks

Managing Project Documents

Viewing and Creating Document Libraries

Uploading Documents to a Document Library

Creating a New Folder in a Documents Library

Working with Existing Documents in a Documents Library

Viewing Document Properties

Editing Document Properties

Editing a Document

Checking Out a Document Manually

Viewing the Version History for a Document

Deleting a Document

Sending a Document to another Location or Application

Subscribing to E-Mail Alerts about a Document

Accessing the Public Documents Library

Managing Tasks

Creating a New Task

Working with Existing Tasks

Using Calendars

Creating a New Calendar Event

Working with Existing Calendar Events

Using Team Discussions

Creating a New Team Discussion

Working with a Team Discussion

Accessing the Project Workspace from Project Professional 2007

Module 18: Project Workspace Advanced Features

Using Project Workspace Advanced Features

Editing in a Datasheet

Using the Task Pane

Adding Totals to the Datasheet View

Opening Document Libraries with Windows Explorer

Exporting to a Spreadsheet

Opening with Access

Creating a Visio Diagram

Connecting to Outlook

Connecting from a Document Library

Connecting from the Calendar Page

Connecting from the Tasks Page

Connecting from the Team Discussions Page

Viewing an RSS Feed

Setting Alerts

Creating a Column

Managing Project Workspace Views

Creating a Standard View

Creating a Calendar View

Creating an Access View

Creating a Datasheet View

Creating a Gantt View

Modifying Existing Views

Modifying List Settings

Specifying Title, Description, and Navigation Settings

Specifying Versioning Settings

Specifying Advanced Settings

Setting Content Types

Deleting a List Type

Saving a List as a Template

Specifying Workflow Settings

Specifying RSS Settings

Specifying Columns Settings

Specifying Views Settings

Managing the Project Workspace

Creating New Site Content

Editing a Project Workspace Page

Modifying the Site Settings

Module 19: Working with Status Reports

Requesting a Status Report

Editing and Deleting Status Reports

Responding to a Status Report Request

Submitting an Unrequested Status Report

Viewing the Status Report Archive

Viewing Status Report Responses

Viewing Unrequested Status Reports

Module 20: Working in the Resource Center

Using the Resource Center

Applying Resource Center Views

Selecting and Deselecting Resources

Viewing Resource Availability

Viewing Resource Assignments

Editing Resource Details

Editing Details Individually for a Group of Resources

Editing Resource Information in Project Professional 2007

Module 21: Working in the Project Center

Using the Project Center

Using Project Center Views

Working with Detailed Project Views

Navigating to the Project Workspace

Editing Project Properties

Opening Projects from the Project Center

Checking In a Project

Closing a Project to Updates

Staffing a Project from the Project Center

Creating a Resource Plan

Building a Project Team

Module 22: Working with Data Analysis

Understanding Data Analysis Views

Understanding OLAP Cubes

Using Data Analysis Views

Customizing a Data Analysis View

Using the Data Analysis Toolbars