

Course Syllabus

Managing Enterprise Resources using Microsoft Project Server 2007

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 2007 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 2007 or earlier versions.

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
- Create a Project Server login account in Project Professional 2007
- Create and save a Proposal and an Activity Plan
- Add resources to a project team, assign resources to tasks, and level overallocated resources
- Enter and approve both Timesheet information and task updates
- Use Outlook to track task progress
- Set up e-mail Notifications and Reminders from Project Server

- Use the Project Workspace to manage Risks, Issues, Documents, and Deliverables associated with a project
- Create and manage Status Reports
- Access resource availability and assignment information through Project Web Access
- Analyze project portfolio information using Data Analysis views

Topical Outline

Module 01: 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 02: 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 03: 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 04: 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 05: 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 06: 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 07: 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

Module 08: 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 09: 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 10: 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 11: 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 12: 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