

Course Syllabus

Managing Enterprise Projects using Microsoft Project Server 2007

Course Overview

Managing Enterprise Projects using Microsoft Project Server 2007 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.

Target Audience

Managing Enterprise Projects 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 Establishing a Project Management Foundation using Microsoft Project 2007 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
- 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
- Create and save an enterprise project, and work with Offline projects
- Import a local project into the Project Server database
- Add resources to a project team, assign resources to tasks, and level overallocated resources
- Analyze the Critical Path and Task Drivers in a project
- Publish an enterprise project
- Create Deliverables associated with a project
- Enter and approve both Timesheet information and task updates
- Use Outlook to track task progress
- Analyze project variance, make plan revisions, and rebaseline a project
- 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
- Use advanced features of the Project Workspace
- Create and manage Status Reports
- Access resource information and project portfolio 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: 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 05: 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 06: 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 07: 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 08: 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 09: 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 10: 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 11: 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 12: 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 13: 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 14: 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 15: 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 16: 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 17: 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 18: 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