

## Course Syllabus

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# Mining Your Enterprise Portfolio using Microsoft Project Server 2007

## Course Overview

This course gives managers and executives a thorough overview of Microsoft Office Project Server 2007, 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 senior managers working in an organization that uses Microsoft Office Project Server 2007 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 course is a "must" for anyone with oversight responsibilities for a portfolio or program of projects in an enterprise project management environment, and 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 the planning process used to create an enterprise project
- Understand and use the Project Web Access user interface
- Track and approve time in Project Web Access
- Set up e-mail Notifications and Reminders from Project Server
- Manage Risks, Issues, Documents, and Deliverables associated with an enterprise project
- Create and manage Status Reports

- Access resource information and project portfolio information through Project Web Access
- Perform portfolio analysis 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: Understanding Enterprise Projects**

Understanding the Project Planning Process

Understanding Publishing

Reading a Gantt Chart in an Enterprise Project

### **Module 03: 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*

## **Module 04: Tracking Time**

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*

## **Module 05: Approving Time**

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 06: Managing Personal Settings**

Personal Settings Overview

Changing Your Password

Managing Alerts and Reminders for Yourself

Managing Alerts and Reminders for Your Resources

## **Module 07: 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 Project Deliverables

### **Module 08: 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 09: 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 10: Working in the Project Center**

Using the Project Center  
*Using Project Center Views*  
*Working with Detailed Project Views*  
*Navigating to the Project Workspace*  
Staffing a Project from the Project Center  
*Creating a Resource Plan*  
*Building a Project Team*

**Module 11: 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*