

## Course Syllabus

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# Implementing and Administering Microsoft Project Server 2010 Analyst Boot Camp

## Course Overview

Project Server implementers taking this intensive 5-day hands-on course learn how to properly identify and document requirements, configure and maintain Project Server 2010 using both Project Professional 2010 and the Project Web App interface, and successfully roll out Project Server within the organization. Administrators also learn how to manage the integration points between Project Server 2010 and SharePoint Server 2010, as well as how to configure project collaboration sites and business intelligence features. Learn from instructors who have real-world experience in deploying Project Server across many industries.

Each student receives the following:

- A copy of the 912-page *Implementing and Administering Microsoft Project Server 2010* 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

We have designed the course for non-technical Project Server analysts, and we tailored it 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, you may want to attend this course with a colleague.

## Pre-Requisites

Although you are not required to take any other courses before taking this course, we **strongly recommend** that every Project Server administrator take the *Managing Projects from Foundation to Enterprises using Microsoft Project Server 2010* course to learn how an organization actually uses Project Server 2010.

## Learning Objectives

After completing this course, you will be able to:

- Understand Project Server terminology and core system components
- Describe the project communication life cycle used with Project Server
- Understand the administration interface in Project Web App
- Create a Project Server login account in Project Professional 2010
- Configure custom enterprise fields, Lookup Tables, and calendars
- Configure the Project Server demand and lifecycle management features and understand how they are used in an overall Portfolio Management process
- 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 OLAP Cube and resource availability information
- Create custom views in both Project Web App and Project Professional 2010
- Manage Microsoft SharePoint Server and Project Sites
- Modify Project Web App pages and create new Project Site templates
- Configure Business Intelligence features and build custom Excel-based reports and interactive dashboards
- Manage the Project Server database, including checking in and backing up projects, and cleaning up the Project Server database
- Understand organizational challenges to implementing EPM
- Understand necessary change management commitments
- Understand how EPM deployments can psychologically influence your user audience
- Understand a best practice approach to deploying Microsoft EPM
- Follow the recommended six-phase Project Server implementation model
- Use a provided template to organize Project Server implementation information

## Topical Outline: Day 1

### **Module 01: Introduction and Project Server Overview**

- Introducing the Microsoft 2010 EPM Platform
- Understanding Project Server Terminology
- Enterprise Resource Pool Overview
- Enterprise Global Overview
- Understanding Databases in the Enterprise
- Understanding the Project Communications Lifecycle

### **Module 02: Post Installation Configuration**

- Verify Project Server Functionality

### **Module 03: Understanding the Project Web App Interface**

- Tools for Configuration
- Using the Project Web App User Interface
- Using the Project Web App Administration Interface

### **Module 04: Creating System Metadata and Calendars**

- Understanding Significant Changes to Project Server 2010 Metadata Architecture
- Working with Enterprise Custom Fields and Lookup Tables
- Modifying Built-In Lookup Tables
- Creating and Modifying Custom Lookup Tables
- Creating Custom Fields
- Creating Free Entry Custom Fields
- Creating a Custom Field with a Lookup Table
- Creating a Custom Field with a Formula
- Importing a Local Field as a Custom Enterprise Field
- Displaying Graphical Indicators in Custom Fields
- Deleting a Custom Field or Lookup Table
- Planning for Matching Generic Resources
- Creating Enterprise Calendars

## Topical Outline: Day 2

### **Module 05: Configuring Lifecycle Management**

- Understanding Lifecycle Management
- Creating Lifecycle Management Elements
- Creating Enterprise Project Templates
- Working with the Sample Workflow
- Configuring Project Workflow Settings

### **Module 06: Building and Managing the Enterprise Resource Pool**

- Enterprise Resource Pool Overview
- Understanding Enterprise Resource Types
- Working with the Resource Center Data Grid
- Creating Resources Using Project Professional 2010
- Editing Enterprise Resources Using Project Professional 2010
- Using Project Web App to Create an Enterprise Resource
- Mass Editing Enterprise Resources
- Adding Resources Using Active Directory Synchronization
- Preparing to Import Enterprise Resources
- Importing Enterprise Resources
- Deactivating an Enterprise Resource

### **Module 07: Initial Project Server Configuration**

- Setting High-Level Enterprise Functionality
- Configuring Exchange Server Synchronization
- Configuring Alerts and Reminders
- Setting Options for the OLAP Cube
- Configuring Event Handlers
- Configuring the Quick Launch Menu

## Topical Outline: Day 3

### **Module 08: Configuring Time and Task Tracking**

- Understanding Tracking
- Defining Financial Periods
- Defining Time Reporting Periods
- Configuring Timesheet Options
- Configuring Administrative Time
- Disabling the My Timesheet Functionality
- Setting the Task Tracking Method
- Setting Up the Timesheet Page
- Customizing the My Tasks Page
- Tips for Using Tracking Methods

### **Module 09: Configuring Project Server Security**

- Project Server Security Overview
- Setting Organizational Permissions
- Understanding Users vs. Resources
- Managing User Accounts
- Controlling Security with Groups and Categories
- Understanding Permissions
- Managing Permissions through Groups
- Managing Permissions through Categories
- Using and Managing Security Templates
- Managing AD Synchronization for Groups
- Resolving Common Security Requirements

### **Module 10: Building the Project Environment**

- Importing Existing Projects and Templates
- Building the OLAP Cube

## Topical Outline: Day 4

### **Module 11: Creating and Managing Views**

- Creating Gantt Chart Formats
- Creating Grouping Formats
- Managing Project Web App Views
- Creating Custom Views in Project Web App
- Understanding Enterprise Views in Project Professional 2010
- Using the 4-Step Method to Create a New View
- Creating Useful Enterprise Views

### **Module 12: Managing Project Sites**

- Introducing SharePoint
- Managing the SharePoint/Project Server Connection
- Modifying Project Sites

### **Module 13: Configuring Business Intelligence and Reporting**

- Reporting Architecture Overview
- Business Intelligence Center Overview
- Microsoft SharePoint Excel Services Overview
- Working With the Built-In Microsoft Excel Reports
- Working with SharePoint Dashboards
- Adding Non-Project Server Users as Report Viewers

### **Module 14: Managing Project Server Day to Day**

- Checking in Enterprise Objects
- Deleting Enterprise Objects
- Working with Administrative Backups
- Changing or Restarting Workflows
- Configuring and Managing the Queue
- Monitoring Project Server Licenses

## Topical Outline: Day 5

### **Module 15: Understanding the Human Challenge**

- Thinking Outside the Project
- Understanding the Formulas for Disaster
- Preparing Strategies for EPM Deployment Success

### **Module 16: Applying a Deployment Process**

- Understanding the Deployment Process
- Managing the Discovery Phase
- Managing the Definition Phase
- Managing the Design Phase
- Managing the Deploy Phase
- Managing the Pilot Phase
- Managing the Rollout Phase

### **Module 17: Analyst Workshop**

- Gathering, Reviewing, and Analyzing Discovery Documentation
- Preparing the Straw Man Requirements Document
- Identifying Stakeholders and Clarifying Requirements
- Finalizing Requirements and Preparing for Installation and Configuration
- Planning for System Pilot and Rollout
- Planning for User Training