



## **Course Syllabus**

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# **Managing Enterprise Projects using Microsoft Office Project Server 2007**

## **Course Overview**

Managing Enterprise Projects using Microsoft Office 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 Office 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 Office 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