



Microsoft Project Server (Implementing Enterprise Portfolio Management) - Three-Day Seminar

Program Number: PMMSPS / PDUs: 18

We recommend a working knowledge of Microsoft Project to take this class.

1.0 Introducing Microsoft Project Server

- Getting Started with Project Server
- The Project/Project Server Workflow
- Project Team Collaboration Tools
- Advanced Analysis
- Portfolio Modeling
- Resource Tools
- Choosing to Implement Project Server
- The Benefits of a Project Management Tool
- Configuring Project for Your Business
- The Challenges of Moving to a Project Management Tool

2.0 An Implementation Framework

- The Last Entry on the Administration Page
- EIF Overview
- EIF Trilogy
- Enhancing the EIF

3.0 Requirements Gathering

- Your First Iteration
- Determine Process Improvement Requirements and Goals
- Determine Core Requirements
- Define Training Requirements
- Project Templates
- Project Files
- Define Noncore Requirements
- Add System Design Information

4.0 Designing a Physical Deployment

- Choosing Hardware
- Environment Requirements
- Using Project and Project Server-Across
- Low-Bandwidth Connections
- Scaling Project Server Deployments
- Strategizing Your Growth Path

Course Objectives:

Participants will gain a working knowledge of using Microsoft Project Server. Gain the knowledge to work and manage multiple projects.

Learn How to:

- Standardize projects in the Enterprise environment
- Manage enterprise resources
- Manage project portfolios
- Use the administering enterprise features
- Define the enterprise user profile
- Manage multiple projects using the Project portfolio
- Manage Risk using the Issue management piece

5.0 Installation and Share Point Team Services and Project Server

- Before Beginning the Installation Process
- Installation Preparation
- Installing STS and Project Server
- Post installation Steps
- Verifying Project Server/STS Interoperability
- Installing Project Professional
- Installing SQL Decision Support Objects

6.0 Installation Troubleshooting

- Troubleshooting Share Point Team Services Installation
- Resolving Project Server Installation Issues
- When You Can't Connect to Project Server through the Browser
- When Project Professional Doesn't Connect to Project Server
- Uninstalling STS
- Uninstalling Project Server



- Backing up and Restoring Project Server and STS

7.0 Advanced Installation Techniques

- Creating Multiple Project Server Instances
- Understanding Registry Keys that Relate to Your Project Server Installation
- Distributing Project Server Components
- Restoring an STS Implementation to a Different Server

8.0 Getting Started with Project Server Configuration

- Understanding Project Server's Language
- Understanding Publishing in Project Server
- Understanding Enterprise Global Concepts
- Getting Familiar with the Project Web Access Administration Interface
- Getting Familiar with Configuration Selections in Project Professional Edition
- Understanding Custom Outline Codes and Custom Fields

9.0 Configuring Project Server Application Options

- Setting Options for Enterprise Features
- Setting Options for OLAP and Resource Availability Tables
- Setting Base URL Paths for Project Server
- Configuring Project Web Access Menus
- Configuring Tracking Method Settings
- Configuring Gantt Chart Formats and Grouping Formats
- Configuring Non-project Time Categories
- Setting Default Working Times for the Enterprise
- Adding Simple Home Page Content and Links Establishing Project Versions
- Specifying User Authentication and Password Length
- Managing Your Licenses

10.0 Configuring Project Server Security

- Global Permissions Essentials
- Controlling Global Permissions Globally
- Working with Permissions in Groups and Categories

- Setting Permissions with Security Templates
- Working with Categories
- Understanding the Group/Category Cross-Connect
- Working with the Resource Manager Relationship
- All about User Accounts

11.0 Building an Enterprise Resource Pool

- The Importance of the Pool
- Local vs. Enterprise Resources
- Understanding Enterprise Resource Types
- Your Resource Availability Decision Is Due
- Setting up Skill codes and Other Resource Keys
- Opening the Resource Pool
- Working with Individual Resources
- Coalescing Your Resource Pool Input
- Adding Resources from Active Directory or Your Company Address Book
- Verifying a Windows Account
- Preparing Custom Field and Outline Code Data
- Importing Resource Information Completing the Pool Build

12.0 Establishing the Project Environment and Configuring Project Server Views

- Importing Projects
- Controlling the Project Environment with Templates
- Determining Timesheet (Published) Fields
- Building the Cube and Publishing Resource Availability
- Creating and Modifying Project Server Views
- Adding Views Created Externally to Your System

13.0 Building Project Plans and Project Teams

- Creating an Enterprise Project
- Opening and Closing Project Plans
- Taking Projects on the Road
- Building a Team
- Assigning Resources
- Leveling Resources



- Using the Resource Substitution Wizard
- Understanding Project Server Publishing
- Requesting Task Progress outside the Normal Flow

14.0 Tracking Progress through Project Web Access

- Working with Tasks in Project Web Access
- Understanding the Timesheet View
- Reporting Progress through the Timesheet
- Using Other Timesheet Functions
- Applying Updates in Project Web Access
- Setting Rules for Accepting Task Updates

15.0 Working Collaboratively Through Project Web

- Access
- Using Features from the Project Web Access Home Page
- Working with Documents and Issues
- Modifying Issues Lists and Document Libraries
- Requesting and Responding to Status Reports

16.0 Viewing and Analyzing Resource and Project Information

- Working in the Resource Center
- Working in the Project Center

17.0 Managing Project Server

- Managing SharePoint Team Services
- Checking in Enterprise Resources and Projects
- Cleaning Up the Project Server Database
- Permanently Removing a Resource
- Renaming a Project
- Monitoring Your Server

18.0 Customizing the Project Guide

- Introduction to the Project Guide
- Components of the Project Guide
- The Project Guide in Action
- Project Guide Architecture
- Customizing the Project Guide
- Deploying Project Guides