



## Course details...

- Duration:** Two days at a cost of £600 plus VAT
- Course overview:** A practical and thought-provoking workshop explaining techniques for planning and controlling projects using Microsoft Enterprise Project Management (EPM). Detailed working concepts of the system are explored to help plan and control people, tasks and time in an enterprise environment. Predefined or customer-specific exercises test skills and abilities and relate them to practical project environments.
- Designed for:** Microsoft Project Professional 2007 users who will be planning projects and utilising resources within an EPM environment.
- Prerequisites:** A basic understanding of Microsoft Project, together with general project management knowledge is recommended for attendance. Successful completion of one or more of the following would provide this prerequisite:
- Microsoft Project Essentials PF0811
  - Project Mentor PF0813
- Follow on learning:** To expand upon the competences developed, the following should be considered:
- EPM Advanced PF0803

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### EPM Architecture

This first section introduces you to the Enterprise Project Management architecture and how the various products fit together.

### Launching the Project Web Access client and reviewing the Project Centre

This is where information across the whole of the project portfolio can be looked at and analysed. Individual projects can be drilled into to look at the tasks within the project. You will also learn how to create a Proposal and/or Activity from the Project Centre and how to assign resources to it. You will then see how to Edit the project properties e.g. the Owner of the project or the Project Name etc.

### Creating and setting up a project

You will be shown how to open Microsoft Project from the Project Center, and use it effectively by customising the toolbars within it. You will be shown how to set up a project and define and schedule task and their dependencies. Changes to a task will highlight other tasks that are affected and facilities are available for you to see what is driving a task.

You will also be shown how to create deliverables which can be shared between projects. You will learn the importance of filtering and grouping tasks within your project and you will create a local custom field (while being aware that Global fields are created by Administrators). You will then be shown how to print a project, then save and publish it.

### Assigning Resources to your project

This section shows you how to use the Build Team functionality to assign Enterprise resources to your project. You will learn how to select the right resources and to check their availability and skills before you assign them to your project. You will learn how to see where the resources are working across all the portfolio of projects in the Resource Usage view.

### Course content

- EPM Overview of products and how they fit together

### Course content

- Logging into the system
- Reviewing the performance of all of the projects in a top level view
- Drilling down into individual projects
- Create a new Activity and assign resources to it
- Edit project properties
- How to convert a Proposal or Activity to a project

### Course content

- Opening MS Project
- Customising the toolbars
- Mapping the project to Enterprise Global
- Change highlighting
- Task drivers
- Multiple-undo
- How to change the working calendar
- How to create deliverables
- Looking at task constraints
- Filtering and grouping
- Creating and applying custom fields
- Printing the project
- Saving and naming the project
- Closing and publishing the project

### Course content

- Assigning Enterprise resources to your project
- Checking resource availability and skills
- Seeing the resources shared across the project portfolio in the Resource Usage view

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### The Project Web Access Resource Centre

You will now see how to add and edit resource in the Enterprise Resource Pool (if you have permissions to do so). You will also be shown how to view a resource assignments and capacity across the portfolio of projects to see if they have any availability.

### Dealing with Task Assignments & Updates

This section shows you how task assignments are communicated to the team member. You will also learn how to delegate, self assign and reassign tasks, as well as updating timesheets and administrative time. You will then see how to approve or reject tasks updates and timesheets.

### Personal Settings

The personal setting section shows how to set up Alerts and Reminders which can be extremely useful for dealing with a large quantity of tasks and status reports.

### Reporting

Providing an overview of the powerful reporting and analysis features of EPM. The Data Analysis functionality enables you to review project performance across the project portfolio or for an individual project. You can analyse via projects, resources and tasks. Also an introduction to reports created via SQL Reporting Services.

### Course content

- How to add a resource to the Enterprise resource pool
- How to edit a resource in the Enterprise resource pool
- How to bulk edit resources
- How to view a resource/s assignments and availability

### Course content

- Looking at your assignments
- Looking at your Personal Gantt Chart to see assignments across projects
- Updating hours of work on a task
- Reassigning tasks
- Self-assigning tasks
- Creating new project tasks
- How to create new tasks outside of project plans
- How to update timesheets, including Administrative time
- Approving or rejecting tasks
- Creating rules for accepting task updates
- Approving or rejecting timesheets
- Approving Administrative time
- Updating the project with the approvals

### Course content

- Setting up your own Alerts and Reminders
- Setting up Alerts and Reminders for your resources

### Course content

- Looking at project performance using Data Analysis
- Looking at resource Data Analysis
- Using the Data Analysis toolbar
- Adding fields to the pivot table
- SQL Reporting Services Reports

## Course details...

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### Windows SharePoint Server

Accessing the Project's workspace, you will see how to create, update and control a project related document. You will see how to create a risk and issue and how to link them to a task/s within the project.

### Course content

- Accessing the project workspace
- Creating a document library/file
- Creating, updating and control the versioning of a document
- Creating a new columns, views and field for a Risk or Issue
- Creating a risk
- Creating an issue
- Linking a risk or issue to a project task
- Setting up an Alert for a new Risk
- Editing risks in the Datasheet view
- Creating a report of risks or issues
- Entering project events on the Calendar
- Creating new project workspace site content