



Course details...

- Location:** Hoppingwood Farm, London, SW20 0AB
- Duration:** One day at a cost of £200 plus VAT per person.
- Course overview:** An excellent course for those wondering what Project Server/Enterprise Project Management (“EPM”) using Microsoft Project Server is all about and to ensure that it is what they want for their company. This course is also suitable for clients who are considering upgrading from an earlier version of Project Server.
- Designed for:** Companies who are considering the deployment of Project Server to control and manage their projects.
- Just follow the course to get a useful overview of Project Server functionality. What you will end up with is a greater understanding of Project Server functionality and how processes can best be utilised and whether Project Server is what your company requires.
- Prerequisites:** Some formal knowledge of project management and software applications is required to get the most benefit from the time spent. Successful completion of one or more of the following would be an advantage:
- Microsoft Project 2010 PF1010 or PF1011
 - Project Mentor PFO813
- Follow on learning:** To expand upon the competences developed, the following should be considered:
- Project Server 2010 Fundamentals PF1002
 - Project Server 2010 Fundamentals for Administrators PF1004

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Explaining the environment

The Project Server/Enterprise Project Management (EPM) architecture will be explained as it is essential that this is understood in order to use it properly. You will learn the different components that make up the architecture of Project server.

Now that Project Server 2010 sits on the SharePoint 2010 platform it is very important that users understand the topology and how it all fits together.

Project preliminaries

This first section is all about getting started with Project Server/Enterprise Project Management. You will learn about logging into Project Server. You will be introduced to Project Web App (PWA) and shown the Home page.

Project Server Project Center

The Project Centre is where all the projects in the project portfolio can be viewed. This is a core functionality of Project Server as this is where users with permission can view projects and see if they are on budget and keeping within their timescales etc.

Staff can drill down into the projects in the Project Centre and see task details. Many views can be set up within the Project Centre to provide users with information that suits their needs.

Workflow in Project Server 2010 including the Portfolio Server functionality

Project Server and Portfolio Server have been amalgamated in Project Server in 2010 and thus no more need for the Gateway. This means that the workflow can take the project through from the proposal stage to the close out stage and include the Select functionality that used to be done only in Portfolio Server.

User will be shown a basic workflow that takes the project through all of the stages from the initial proposal stage and includes the Selection process e.g. seeing if the project aligns to the prioritized business drivers and thus selecting it if it has a good strategic value.

Course content

- Architecture
- Software components
- Description of Enterprise Global and the Enterprise Resource Pool

Course content

- Logging into the Project Web App (PWA) client
- The Home page

Course content

- Seeing projects and programmes in the Project Centre
- Project Centre high level view
- Drilling down into the task views
- Editing a project in PWA
- Understanding Project Types
- Understanding Project Detail Pages

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- How Workflow works in Project Server and the different phases such as Create, Select, Plan, and Manage
- Setting up a project proposal
- Showing the Approval process
- Defining the project by completing the different forms such as Strategic Impact, Cost and Benefit and Risks
- Completing a project Resource Plan
- Setting up and prioritising the Business Drivers



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All of the old Portfolio Server selection process will be explained from the setting up of the business drives to cost analysis against the Efficient Frontier chart, to looking at the Strategic Alignment chart to see if the money will be spent on the correct prioritised business drivers.

The user will then see how to force-in projects and to see how the strategic value changes when this is done.

The users will finish by analysing the resources to see which projects will have the available resources. The user will be shown that they can add more resources or they can adjust the start dates of projects to ensure that the resources are used efficiently and effectively.

- Reviewing the strategic value of the prioritised projects
- Doing a cost analysis of the projects using the Efficient Frontier chart
- Looking at the Strategic Alignment chart to see Driver Importance against the Total Cost
- Doing various analysis
- Forcing projects into the selection
- Comparing the different analysis
- The Analyse Resources functionality
- Adjusting the start date of projects to utilize resources
- Replacing generic resources with named resources on the selected projects in the Plan Phase
- Using the Plan Phase Checkpoint to ensure that the resources, schedule and project costs are all up-to-date, and that the plan has been base-lined
- The Manage phase

Using MS Project Professional to create and edit the project plan

You will be shown how to edit a project plan by checking it out from the Project Center. You will be shown the new functionality of Project Professional 2010 including the ribbons, the File tab, Timeline and Team Planner.

You will then be shown creating a project plan from scratch and the new functionality of manual tasks, the task inspector and inactive tasks etc.

You will see how to select resources from the shared resource pool and how to assign them to tasks in your project.

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- Checking out a project for editing in Microsoft Project Professional
- The different ribbons in Microsoft Project Professional
- New functionality in Microsoft Project Professional
- Creating a new project
- Entering tasks, durations and links using the new functionality for 2010
- Building the project team and Assigning resources based on their availability
- How to create a project from a template
- The building blocks of a project
- How to view the project's data and assign Outline codes
- How to base-line and print a project plan
- How to save, publish and check-in a project plan properly



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The Enterprise Resource Pool

The Enterprise Resource Pool is a central repository of resources which are available to users to assign to their projects. You will be shown how to check resource availability into the future.

Tasks and Timesheets

You will see where resources update their timesheets.

Seeing where resources update task progress.

You will then see where the timesheet and task updates are approved by the line managers.

Reporting

You will be shown general reports that can be created within Project Server. The reports can be created in Windows SharePoint, the Project Center and in Microsoft Project Professional.

Managing Project Sites

Project Server can create individual Project Site Templates (“workspaces”) to store project related documents, administer risks and issues, and provide other collaborative functions such as discussion groups and meeting calendars.

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- Checking a resource or resources availability over time
- Seeing the resource assignments
- Status reports

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- My Timesheets and updating progress on tasks
- The My Tasks screen
- Approving task and timesheets
- Dealing with rejected tasks
- Personal Settings Overview

Course content

- The Business Intelligence Center and monitoring performance via KPIs
- The Corporate Dashboard
- Exporting reports to Excel

Course content

- The Project Site Template
- Creating a new project library
- Setting up Document versioning
- Creating a new document for the library
- Adding columns to a document library
- Document version control and check out/check in
- Working with Risks and Issues