



Course details...

- Duration:** One day at a cost of £300 plus VAT
- Course overview:** A useful overview for those wanting to understand what Enterprise Project Management (EPM) using Microsoft Project Server makes possible and to ensure that it is what they want for their organization.
- Designed for:** Companies who are considering EPM to control and manage their projects.
- Prerequisites:** Some formal knowledge of project management and software applications is recommended to gain the most benefit. Successful completion of one or more of the following would be an advantage:
- Microsoft Project PFO811
 - Project Mentor PFO813
- Follow on learning:** To expand upon the competences developed, the following should be considered:
- Microsoft EPM 2007 Fundamentals PFO802
 - Microsoft EPM 2007 Fundamentals for Administrators PFO804

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Explaining the environment

The 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 and see where the configured calendars, views and Enterprise Outline Codes are stored.

Project preliminaries

This first module is all about getting started with Enterprise Project Management. You will learn about logging into EPM. You will be introduced to Project Web Access (PWA) and shown how to open MS Project Professional (PRO) from the Project Centre. You will create a new project and learn how to map the project to Enterprise Global.

EPM Project Centre

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

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 views that suit their needs.

Using MS Project Professional to plan and assign resources

You will now be selecting resources from the shared resource pool and assigning them to tasks in your project.

Course content

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

Course content

- Logging onto the hosted environment
- Project Web Access Client
- Opening a project in MS Project Professional (PRO)
- 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
- Check in and checkout functionality
- Publishing the project
- Saving offline

Course content

- Seeing the newly created project in the Project Centre
- Project Centre high level view
- Drilling down into the task views
- Editing the author of the project
- Creating an Activity or Proposal

Course content

- Opening newly created project
- Entering tasks, durations and links
- Building the project team
- Assigning resources based on their availability

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Tasks and Timesheets

Seeing how the user can update their tasks independently of updating their timesheets.

Updated tasks, timesheets and administrative time can be approved by the line manager.

Using Enterprise Fields

An enterprise field will become common to every project within the portfolio. They can be predefined values or contain outline codes.

Fields may also contain formula that performs calculations that can be displayed by graphical indicators.

Project Web Access Enterprise Resource Pool

The Enterprise Resource Pool is a central repository of resources that are available to users to assign to their projects.

Overview of Security and Administration Facilities

System administrators have a variety of facilities to control system access and security, create and maintain views and monitor system jobs.

Course content

- Seeing new tasks on Resource's 'My Tasks' page
- Updating progress on tasks
- Approving task updates
- Completing timesheets
- Approving timesheets
- Approving administrative time

Course content

- Reviewing the different types of enterprise fields
- Setting up a value list in Enterprise Global
- Creating a formula and graphical indicators

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- Checking out the Enterprise Resource Pool
- Open a resource to see details on that resource
- Generic resources
- Checking resource availability
- Editing a resource
- Adding a resource to the Pool
- Creating a Status Report

Course content

- Creating and managing PWA Project Centre views
- Introduction to security features
- Manage Users and Groups
- Checking-in a project
- Security template
- Project Web Access Permissions
- Building and Configuring the On-line Analytical Processing Cube (OLAP)
- Managing the queue
- Operational Policies

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Project Analysis and Reporting

The Data Analysis tool is used to analyse cost and work across the portfolio.

You will also be shown general reports that can be created on the EPM, e.g. the Risk/Issues list, reports that can be created in Windows SharePoint, the Project Center and in Microsoft Project Professional.

Windows SharePoint Server (WSS)

EPM can create individual project web sites (workspaces) to store project related documents, administer risks and issues and provide other collaborative functions such as discussion groups and meeting calendars.

Course content

- Introducing OLAP
- Different Data Analysis views
- Exporting to Excel
- Adding fields to the pivot table
- Other reporting facilities

Course content

- Views in WSS
- Document creating and managing
- Risks and Issues
- Change requests
- Deliverables