

## **Microsoft Office Project Server 2010, Managing Projects and Programs**

**Course Duration:** 5 days

**Pre-requisites:** Before attending this course, students must have:

- Fundamental knowledge of project management.
- Experience using Microsoft Office Project to create project schedules.
- Experience using Microsoft Office Project Web Access.
- Experience with Microsoft Office Project Server, preferably Office Project Server 2010.
- Experience with the Windows XP, Windows Vista or Windows 7 operating system.
- Experience with Microsoft Office Excel 2003, 2007 or 2010.

In addition, it is recommended, but not required, that students have:

- Familiarity with the key project management concepts and terminology found in the PMI PMBOK Guide - Third Edition.
- Familiarity with the key program management concepts and terminology found in PMI's The Standard for Program Management.

### **Course Outline**

#### **Module 1: Managing Enterprise Projects, Programs, and Portfolios**

This module defines and explains project, program, and portfolio management, their interrelationships, and how they work and are managed in an enterprise. Participants will be able to describe general program management standards and define general program management terminology.

#### **Lessons**

- Managing Projects, Programs, and Portfolios in an Enterprise.
- Understanding Program Management Standards and Terminology.

After completing this module, students will be able to:

- Define projects, programs, and portfolios and how they are managed in an enterprise.
- Explain program management standards and terminology.

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**Module 2: Working with the Enterprise Project Management Solution 2010**

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This module explores the features, benefits, components, and architecture of the Office EPM Solution. Also, the different client interfaces that are available as part of Microsoft Office Project Server 2010 are described and demonstrated so that you can become familiar with techniques for navigating the interfaces as various users.

#### **Lessons**

- Understanding the EPM Solution 2010.
- Navigating the EPM Solution Interfaces.

#### **Lab : Working with the EPM Solution**

- Reviewing the Project Center.
- Reviewing Project Details.
- Reviewing the Resource Center.
- Reviewing Project Workspaces.

After completing this module, students will be able to:

- Describe the architecture and components of the Office EPM Solution 2010.
- Navigate the key interfaces of Microsoft Office Project 2010, Microsoft Office Project Server 2010, and Microsoft Office Project Web Access.

#### **Module 3: Program Management**

This module explains how to define a standardized methodology for program management. It also defines the necessary policies, procedures, and required infrastructures to establish program management properly in enterprise organizations.

#### **Lessons**

- Understanding Program Management.
- Program Management in the Organization.
- Defining Policies and Procedures for Program Management.
- Program Life Cycle Process and Phases.

After completing this module, students will be able to:

- Define program management.
- Describe program management in the organization.
- Define the policies and procedures for program management.
- Describe the program life cycle process and phases.

#### **Module 4: Defining and Creating the Enterprise Environment**

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This module explains the default configurations in Office Project Server 2010. You will then learn how to propose and apply configuration changes to an enterprise environment as they pertain to program management activities.

#### **Lessons**

- Reviewing the Default Settings of Office Project Server 2010.
- Implementing Changes in an Enterprise Environment.

After completing this module, students will be able to:

- Describe the default settings for an enterprise environment in Project Server 2010.
- Implement a proposed change in an enterprise environment.

#### **Module 5: Setting Up the Program**

This module explains how to establish the characteristics and parameters of a program and define the program benefits in the context of Office Project Server 2010. It also describes how to identify ways to optimize the Project Server 2010 enterprise environment to effectively and efficiently implement and execute your programs.

#### **Lessons**

- Working with a Program.
- Customizing Permissions and Enterprise Fields.

#### **Lab : Proposing Changes to the Enterprise Environment**

- Proposing Changes to the Enterprise Environment.

#### **Lab : Updating the Definition of a Program in Office Project Server 2010**

- Updating the Definition of a Program in Office Project Server.

After completing this module, students will be able to:

- Create, save, and publish a program.
- Customize permissions and enterprise fields in an enterprise environment.

#### **Module 6: Planning the Program**

This module explains how to deliver the detailed plan of a program and optimize the program for time, cost, and resources in order to establish a program baseline in the context of Office Project Server 2010.

#### **Lessons**

- Developing a Detailed Plan of the Program.
- Establishing Project Interdependencies in a Program.
- Finalizing the Program Plan.

#### **Lab : Adding and Deleting a Project and Resetting the Baseline**

- Removing a Project from the Program Plan.
- Adding a New Project to the Program Plan and Creating Appropriate Interdependencies in the Program Plan.

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- Resetting the Baseline.

**Lab : Proposing and Implementing Updates to Improve the Planning Process**

- Proposing Changes to the Enterprise Environment to Improve the Planning Process.
- Implementing Changes to Views and Enterprise Fields.

After completing this module, students will be able to:

- Develop a detailed plan of a program in Office Project Server 2010.
- Establish the interdependencies for cross-project deliverables and resource assignments in a program.
- Optimize a program for time, cost, and resources and reset the baseline.

**Module 7: Managing the Resources**

This module explains how to define program resources and, after identifying the critical resources, review and update the program plan and baseline.

**Lessons**

- Updating the Enterprise Resource Pool and Replacing Resources.
- Refining the Program Plan by Identifying Critical Resources.

**Lab : Updating the Enterprise Resource Pool and Replacing Resources in the Program Plan**

- Incorporating New Resources into the Enterprise Resource Pool.
- Updating the Attributes of Enterprise Resources.
- Replacing Generic Resources with Named Resources.

After completing this module, students will be able to:

- Update the enterprise resource pool and replace resources in the program plan.
- Refine the program plan by identifying critical resources and applying necessary changes.

**Module 8: Tracking Timesheets and Task Progress**

This module explains how to track the work of program resources in timesheets and the task progress of a program in Office Project Web Access and Office Project 2010.

**Lessons**

- Managing Timesheets and Task Progress.
- Configuring Timesheets and Task Progress.

**Lab : Proposing Improvements to Timesheet and Task Progress Configurations**

- Proposing Improvements to the Timesheet Configuration.
- Proposing Improvements to the Task Progress Configuration.

**Lab : Reporting Time and Managing Timesheets**

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- Reporting Time as a Team Member.
- Approving, Rejecting, and Changing Timesheets.

**Lab : Reporting and Managing Task Progress**

- Reviewing and Approving, Rejecting, and Changing Task Progress as a Project Manager.
- Reviewing the Project Progress Reports as a Program Manager.

After completing this module, students will be able to:

- Manage the reporting of work and task progress and identify any timesheet and task progress configuration issues.
- Configure timesheets and task progress in Office Project 2010.

**Module 9: Performing Earned Value Management**

This module explains how to define Earned Value Management (EVM) and use EVM, including metrics, variances, and performance indexes, to create forecasts and make effective adjustments to a program.

**Lessons**

- Applying Earned Value Management.
- Using Earned Value Management in Office Project 2010.
- Creating and Modifying Views and Reports for EVM Analysis.

**Lab : Performing Traditional Earned Value Management**

- Establishing a Plan to Develop Earned Value Management in a Project by Hand.
- Calculating Progress Up to a Specific Status Date and the EVM Data Points, Variances, and Indexes.
- Calculating Forecasts.

**Lab : Performing Earned Value Management**

- Reviewing the Project Plan and Setting Earned Value Options.
- Creating PV, EV, and AC Graphics of the Program.

After completing this module, students will be able to:

- Manually apply EVM.
- Establish the settings for EVM to track the progress of a program in Office Project 2010.
- Create and modify views and reports for EVM analysis.

**Module 10: Reporting and Analyzing the Program Data**

This module explains how to use the Project Center and the Data Analysis (OLAP Cube) features to view and report the status of a program and to make forecasts.

**Lessons**

- Customizing the Enterprise Fields and Views to Track a Program.
- Working with an OLAP Cube and a Data Analysis View.

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**Lab : Proposing Changes to the Look and Feel of a Program**

- Identifying Needed Changes to the Default Views Used for Task and Project Tracking
- Proposing Changes to the Project Center, Project Details, and Enterprise Global Template Views.

**Lab : Proposing OLAP Cube Configurations**

- Proposing OLAP Cube Configurations.

**Lab : Generating and Modifying Data Analysis Views**

- Generating a Data Analysis View.
- Modifying a Data Analysis View.

After completing this module, students will be able to:

- Customize the enterprise fields and views in Project Center, Project Details, and Office Project 2010 to track a program.
- Work with a Data Analysis view and create, configure, and build an underlying OLAP cube.

**Module 11: Managing Project Workspaces for Programs and the Queue**

This module explains how to configure project workspaces to meet the needs of a program. You will also learn how to properly configure and manage the queue to help you to control and optimize the availability of Office Project Server 2010.

**Lessons**

- Configuring a Workspace for a Project in a Program.
- Managing the Queue.

**Lab : Planning Configuration Changes to a Workspace**

- Planning Configuration Changes to a Workspace.
- Applying Configuration Changes to a Workspace.
- Reviewing Configuration Changes to a Workspace.

After completing this module, students will be able to:

- Configure a workspace for a project in a program.
- Describe and configure the Queue.

**Module 12: Closing the Program and Refining the Environment**

This module explains how to define and apply the closing process for a program and propose and apply changes to the enterprise environment based on the lessons learned through a program life cycle.

**Lessons**

- Closing and Archiving a Program.
- Refining an Enterprise Environment.

**Lab : Proposing Changes to an EPM Environment**

- Determining the Gaps Between a Current EPM Environment and a Required One.

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- Determining the Necessary Modifications to an EPM Environment.
- Creating and Presenting the Proposal Detailing the Necessary Modifications to the EPM Environment to the Administrator.

**Lab : Applying Changes to an EPM Environment**

- Negotiating Changes Between a Project Server Administrator and a Member of the PMO.
- Applying Necessary Changes to the EPM Environment as a Project Server Administrator.
- Testing Changes to the New Environment.

After completing this module, students will be able to:

- Describe the process of closing and archiving a program.
- Refine an enterprise environment.