Essentials of Microsoft Project Server

for Microsoft Project 2013

(1 Day)

Course Overview

After attending this course you will be able to...

Use Project Server 2013 and Project Web App to plan, manage, analyze, and report about projects and understand how those components interact with Microsoft Project Professional 2013, SharePoint, and Outlook so that the entire Project Server environment can be used efficiently for project management within any for-profit or non-profit organization.

You will learn...

- the role that each of the components of the Project Server 2013 project and portfolio management system (Project Professional, Project Server, Project Web App, SharePoint, Outlook) plays in helping project managers plan and manage their projects,
- the constraints due to and benefits of working in a Project Server environment as opposed to a stand-alone Microsoft Project environment,
- how to make files visible to others who have permissions to view them via Project Server,
- ways in which the enterprise that deployed Project Server can customize it for standardization and consistency across the users,
- how different people in an organization (team members, managers, project managers, resource managers) can utilize and benefit from the various Microsoft project and portfolio management components,
- the different types of resources that can be planned and managed in Project Server 2013,
- how to efficiently navigate through Project Web App,
- how to designate a resource assignment to a project as a soft booking,
- the different roles associated with projects and tasks in Server and their purpose,
You will learn (continued)…

- how to plan a project in Project Web App,
- how those with permission to do so can see and understand the demand for and availability of multiple resources across multiple projects,
- how team members can easily determine what tasks they’re responsible for and details about those tasks,
- how to define risks and plans for dealing with them and associate them with projects or specific tasks,
- the capability that Project Server 2013 has for sending out reminders about tasks and status reports and how to set up these reminders,
- how to upload project documents and associate them with a project or particular tasks,
- how to baseline the project,
- how to assess the risk of the schedule and how to identify the critical path,
- the different ways and methods of recording task progress in Project Server,
- how project team members can assign responsibility for a task to another team member,
- how to review and subsequently approve or reject the progress reported on a given task by a team member,
- methods for managing personnel turnover within the Project Server environment,
- how to incorporate changes into the plan,
- how to document an issue and plans for its resolution and associate the issue with a project or task,
- how to upload project documents to the Project Site and how to associate those documents with a task in the project, if desired,
- what a status report is in Project Server, how to request a status report, and how to respond to such a request.

This course is appropriate for you if…

- You are or will be responsible for planning and managing one or more projects in your organization using Microsoft Project Server 2013 and already have a thorough understanding of how to use Microsoft Project Professional 2013, or
- you are responsible for establishing expectations for how Microsoft Project Server 2013 will be used in your organization.
This course is appropriate for you if (continued)…

This course is taught from the project manager’s perspective and assumes that attendees are able to use Project Professional 2013 effectively prior to attending the class. The course does not include content pertaining to Project Professional except for differences in its use due to operating in a Server environment and understanding how Project Professional fits into the larger Project Server environment.

**Benefits of the course include…**

- increased visibility and understanding of projects by all stakeholders,
- efficient use of the many components that make up the Project Server environment resulting in less frustration by users, more efficient use of resources’ time, better quality project management, and the ability to accomplish more work,
- increased understanding of the role that other stakeholders, like resource managers and team members, play on the project and how those stakeholders can use and benefit from Project Server,
- reduced time required by the project manager for progressing tasks and reporting status since task progressing can be done by project team members and Project Server provides the ability for those with permissions to view project status,
- increased likelihood of finishing projects on time and budget,
- an improved understanding of resource utilization and capacity within the organization including data that facilitates determining whether additional projects can be undertaken with existing staffing levels,
- consistency among project managers in the way projects are planned and managed resulting in more internal efficiency and uniform performance as well as making it easier for management to understand and compare project status,
- improved communications among project stakeholders resulting in fewer surprises, an increased chance of project success, and a better understanding by management of project status,
- easily identifiable indicators that the project is deviating from plan.

**Detailed Course Agenda…**

Orientation to Project Server 2013

---

Orientation to the 2013 Microsoft Project Portfolio and Management Environment
Orientation to Project Server 2013 (continued)…

The Differing Roles within Project and Portfolio Management
Microsoft Project Server 2013 Components

Working with Project Files in the Server Environment
Opening Files
Saving & Publishing Files

Understanding the Role of the Enterprise
Impacts on the User
Customization of the Project Management Environment
The Enterprise Calendar
The Organization Structure as Reflected in PWA

Building the Team of Resources
The Types of Resources
Getting Enterprise Resources into the Plan
Getting Local Resources into the Plan

Sharing the Plan with Others
Publishing the Plan
Creating the Project SharePoint Site

Planning in Project Web App

Getting Oriented in Project Web App
The PWA Homepage
The Elements of the PWA Interface

Working with Projects in PWA
The Project Center
When Will I See a Project in PWA?
Working with Projects in PWA
Seeing the Detail About a Project
Utilizing Auto Filters in PWA
The Role of the Project Owner
The Project Site

Managing Resources in PWA
The Resource Center
Planning in Project Web App (continued)…

- Viewing Resource Assignments
- Understanding Resource Availability
- Proposed Versus Committed Resource Bookings
- Converting Proposed Bookings to Committed Bookings

Working with Tasks in PWA
- The Task Center
- Viewing Assignment Details

Building a Plan in Project Web App

Finalizing the Plan in PWA

- Understanding the Project Plan
  - Identifying Total and Free Slack
  - Identifying and Assessing the Critical Path
- Identifying and Documenting Risks
  - What is a Risk?
  - Identifying & Tracking Risks
- Establishing the Baseline

Collaboration and Communication

- Setting Up Alerts and Reminders
  - Setting up Alerts for Your Tasks and Status Reports
  - Setting up Alerts for Your Team Members’ Tasks and Status Reports
- Managing Project Documents
  - Uploading Project Documents

Execute the Plan

- Tracking Task Progress
  - Distinguishing Between Time Tracking and Task Statusing
  - Options for Tracking Task Progress
  - Task Progressing Methods
  - Roles Associated with Tracking Task Progress
- Submitting Task Progress Updates
  - The Role of the Assignment Owner
Execute the Plan (continued)…

- Designating an Assignment Owner
- Recording Task Progress in the Tasks View of PWA
- Recording Task Progress in the Assignment Details View of PWA
- Attaching Notes to Tasks

Reviewing and Approving Task Progress Updates
- The Role of the Status Manager
- The Approval Center
- Approving or Rejecting Task Progress Updates
- Establishing Rules for Processing Task Updates
- Viewing Update History

Identifying and Managing Issues
- What is an Issue?
- Defining Issues

Revising the Plan
- Rescheduling the Project
- Rescheduling Tasks
- Assigning Tasks to a Different Resource
- Adding and Removing Tasks to and from the Plan in PWA
- Approving or Rejecting Changes to the Plan
- Managing Personnel Turnover
- Giving Others Access to the File

Evaluating Project Status
- Requesting and Receiving Status Reports