Managing Projects & Portfolios using Microsoft Project Server 2019

MICROSOFT PROJECT SERVER 2019

Managing Projects & Portfolios using Microsoft Project Server 2019

Managing Project and Portfolio using Microsoft Project Server is a 5 Days / 40 Hours Instructor Led training course which covers step by step instructions on Managing project and Portfolios using Microsoft Project Server.

ABOUT COURSE

Course Name	Managing Project and Portfolios using Microsoft Project Server 2019
Course Duration	5 Days / 40 Hours
Courseware	Custom Courseware
Practise on	Microsoft Project Server, Microsoft SharePoint, Microsoft Project Labs
Training Mode	Classroom, Online, Corporate

PREREQUISITES

1. Basic understanding of SharePoint.
2. Basic Knowledge of Microsoft Project
3. Basic Concepts of Project Management
4. Basic of Microsoft Windows Server / SharePoint Server administration

AUDIENCE

- Anyone responsible for using Microsoft Project Server to Managing Project & Portfolios including
- Project Managers, Project Schedulers, Managers, Supervisor, Team Leads, Consultants & others.
- Person Responsible for scheduling, estimating, coordinating, controlling, budgeting and staffing of projects

DELIVERABLES

- ✓ Slides Handout
- ✓ Practice Labs
- ✓ Reference Links
- ✓ Exam Blueprint
- ✓ Trial Software
- ✓ 1 year 360Skills email Support

MODULES

1. Introduction to Microsoft Project Server / Project Online.
2. Task List and Project Sites
3. Introducing Project Web App
4. Configuring Enterprise Objects and Options
5. Working with Project and Portfolio Governance
6. Creating Enterprise Projects
7. Resource and Assignment Planning
8. Project Execution
9. Tracking Time and Task Progress
10. Approving Time and Task Progress
11. Variance Analysis, Plan Revision, and Reporting
12. Managing Risks and Issues
13. Working with Status Reports
14. Working in the Resource Center.
15. Working in the Project Center
16. Creating and Managing Views

17. Working with Business Intelligence and
    Reporting

Module 01: Introduction and Project Server / Project Online Overview
- ✓ Welcome to- Project Server / Project Online
- ✓ Introducing the Microsoft PPM platform
- ✓ Understanding Project Server Terminology
- ✓ Enterprise Resource Pool Overview
- ✓ Enterprise Global Overview
- ✓ Understanding the PPM Platform Technology Stack
- ✓ Understanding the Project Communications Lifecycle

Module 02: Task List and Project Sites
- ✓ SharePoint Concepts
- ✓ Managed Metadata and Enterprise Content Types
- ✓ Understanding Special Project Site Behaviors
- ✓ Managing the SharePoint/project Server Connection
- ✓ Managing List and library Views
- ✓ Modifying List and library General Settings
- ✓ Creating and Editing Pages

Module 03: Introducing Project Web App
- ✓ Introducing Project Web App
- ✓ A Major Decision Point
- ✓ What's New in Project Web App interface?
- ✓ Introducing SharePoint Permissions Mode
- ✓ Using the Administration interface for a PWA instance

Module 04: Configuring Enterprise Objects and Options
- ✓ Introduction
- ✓ Understanding Project Server Metadata Architecture
- ✓ Working with Enterprise Custom Fields and Lookup up Tables
- ✓ Creating Lookup Tables
- ✓ Modifying tile RBS Lookup Table
- ✓ Creating Custom Fields
- ✓ Creating Free Entry Custom Fields

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- ✓ Creating a Custom Field with Lookup Table
- ✓ Modifying Built-In Project and Resource Department Fields
- ✓ Creating a Custom Field Controlled by Workflow
- ✓ Creating a Custom Field with a Formula
- ✓ Displaying Graphical indictors in Custom Fields
- ✓ Deleting a Custom Field or Lookup Table
- ✓ Planning for Matching Generic Resources
- ✓ Creating Enterprise Calendars
- ✓ Resource Engagement
- ✓ Understanding Tracking
- ✓ Configuring Time and Task Tracking
- ✓ Configuring Project Sever for Time Reporting

Module 05: Working with Project and Portfolio Governance
- ✓ Portfolio Management and Project Governance Overview
- ✓ Understanding Project Governance: A Real-Word Example
- ✓ Understanding Portfolio Management: A Real-World Example
- ✓ Configuring Portfolio Management
- ✓ Configuring Project Governance
- ✓ Configuring Demand Management
- ✓ Preparing Proposed Projects for Portfolio Analysis
- ✓ Understanding PTE Demand and Capacity Calculations
- ✓ Working with Portfolio Analyses

Module 06: Creating Enterprise Projects
- ✓ Creating an Enterprise Project Using Project Pro
- ✓ Importing a Local Project into Project Server
- ✓ Creating a New Project from an Enterprise Template
- ✓ Defining an Enterprise Project
- ✓ Understanding the Local Cache
- ✓ Opening and Closing Projects
- ✓ Working with Offline Projects

Module 07: Resource and Assignment Planning
- ✓ Understanding Enterprise Resources
- ✓ Building a Project Team
- ✓ Assigning Resources to Tasks
- ✓ Understanding Other Factors in Assignment Planning
- ✓ Assigning Cost Resources
- ✓ Resource Engagement

✓ Using the Team Planner View
✓ Understanding Resource Overallocations
✓ Leveling Overallocated Resources

Module 08: Project Execution
✓ Analyzing the Critical Path
✓ Working with Project Baselines
✓ Understanding Publishing
✓ Managing Project Deliverables

Module 09: Tracking Time and Task Progress
✓ Tracking Time in Project Web App
✓ Accessing your Timesheet
✓ Tracking Task Progress in Project Web App
✓ Understanding the Tasks Page
✓ Managing Tasks

Module 10: Approving Time and Task Progress
✓ Approvals
✓ Home Page
✓ Approval Center
✓ Approving timesheets
✓ Viewing and Adjusting Submitted Timesheets
✓ Managing Administrative Time Requests
✓ Viewing Task Updates
✓ Task Update processing
✓ Using Status Updates History Page and Approval Rules

Module 11: Variance Analysis, Plan Revision, and Reporting
✓ Understanding Variance
✓ Analyzing Project Variance
✓ Revising a Project Plan
✓ Using a Change Control Process
✓ Rebalancing Your Project
✓ Using the Gantt with Timeline View
✓ Using Visual Report
✓ Using Dashboards

Module 12: Managing Risks and Issues
- ✓ Tracking Project Risks
- ✓ Managing Project Issues
- ✓ Viewing Your Assigned Issues and Risks

Module 13: Working with Status Reports
- ✓ Requesting a Status Report
- ✓ Responding to a Status Report Request
- ✓ Viewing Status Report Response

Module 14: Working in the Resource Center
- ✓ Using the Resource Center
- ✓ Viewing Resource Availability
- ✓ Viewing Resource Assignments
- ✓ Editing Resource Details
- ✓ Resource Engagement

Module 15: Working in the Project Center
- ✓ Using the Project Center
- ✓ Editing Projects in Project Web App
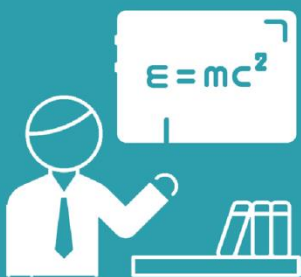
Module 16: Creating and Managing Views
- ✓ Understanding View
- ✓ Creating Gantt chart Formats
- ✓ Creating Grouping Formats
- ✓ Managing Project Web App View
- ✓ Creating Custom view in Project Web App
- ✓ Understanding Enterprise Views in Project Pro
- ✓ Create a New View
- ✓ Creating Useful Enterprise Views

Module 17: Working with Business Intelligence and Reporting

- ✓ Understanding project Server Business intelligence
- ✓ Reporting and Business Intelligence Overview
- ✓ Understanding Available Data
- ✓ Preparing to View or Create Reports
- ✓ Built-In Reports Overview
- ✓ Report Templates / Interacting with Reports
- ✓ Using Power BI

CONTACT US

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