Course 50558A: Microsoft Project Server 2010 Technical Boot Camp

Five days, instructor-led

About this Course

Project Server implementers taking this intensive 5-day hands-on course learn how to properly install SharePoint Server and Project Server 2010, prepare the system for configuration, and configure and maintain Project Server 2010 using both Project Professional 2010 and the Project Web App interface. Administrators also learn how to perform common SharePoint administrative tasks, how to manage the integration points between Project Server 2010 and SharePoint Server 2010, and how to configure project collaboration sites and business intelligence features. Learn from instructors who have real-world experience in deploying Project Server across many industries.

Audience Profile

We have designed the course for technical Project Server implementers, and we tailored it to the business application owner who serves as the organization's primary or backup business application administrator.

At Course Completion

After completing this course, students will be able to:

- Understand Project Server terminology and core system components
- Describe the project communication life cycle used with Project Server
- Understand the administration interface in Project Web App
- Create a Project Server login account in Project Professional 2010
- Configure custom enterprise fields, Lookup Tables, and calendars
- Configure the Project Server demand and lifecycle management features
- Add resources to the Enterprise Resource Pool
- Specify the initial configuration options for Project Server
- Configure time and task tracking settings
- Configure Project Server security using Groups and Categories
- Import enterprise templates and existing projects into Project Server
- Build OLAP Cube and resource availability information
- Create custom views in both Project Web App and Project Professional 2010
- Manage Microsoft SharePoint Server and Project Sites
- Modify Project Web App pages and create new Project Site templates

- Configure Business Intelligence features and build custom Excel-based reports and interactive dashboards
- Manage the Project Server database
- Understand the Project Server technology stack and installation types
- Understand hardware and software requirements
- Install SharePoint Server 2010 and Project Server 2010
- Configure necessary SharePoint farm components for Project Server
- Create instances of Project Web App
- Configure SQL Server Analysis Services for OLAP functionality
- Understand the process of migrating data from Project Server 2007
- Perform Project Server monitoring and troubleshooting
- Perform common SharePoint administrative tasks
- Pass the 70-177 MCTS exam

Pre-requisite

Before attending this course, students should have:

- General Project Management knowledge
- Understand basic scheduling principles.

Course Outline

Module 1: Introduction and Project Server Overview

This module provides an overview of Project Server.

Lessons

- Project Management Overview
- Project Server 2010 Overview
- Project Server Communication Cycle
- Installation Overview

After completing this module, students will be able to:

- Be familiar with the components in the Microsoft EPM platform
- Understand Project Server's enterprise project management terminology
- Be familiar with the Enterprise Resource Pool and the Enterprise Global file
- Describe the new features in Project Server 2010
- Understand the EPM platform technology stack
- Understand the Project Server 2010 installation types
- Name the databases used by Project Server 2010 and Windows SharePoint Services
- Describe the project communications life cycle used in Project Server
- Be familiar with Project Server team collaboration tools

- Understand the concept of publishing with Project Server
- Acquire an overview understanding of OLAP cubes and Data Analysis views

Module 2: Understanding the Project Web App Interface

This module explains how to use the Project Web App interface.

Lessons

- Exploring Tools for Configuration
- Exploring the Project Web App User Interface
- Using the Site Actions Menu
- Using the Browse Tab and Personal Settings
- Logging into Project Web App from another Workstation
- Using the Quick Launch Menu
- Using Ribbon Menus
- Exploring the Approval Center
- Understanding Workflow Approvals
- Using the Tasks Page
- Using the Timesheet Page
- Exploring the Resource Center
- Understanding Resource Assignments and Resource Availability
- Understanding the Driver Library and Driver Prioritization
- Understanding Portfolio Analyses
- Manipulating and Printing the Date Grid
- Exporting the Data Grid to Excel
- Understanding the Administration Interface

Lab : Understanding the Project Web App Interface

- Create a Project Professional Logon

After completing this module, students will be able to:

- Understand and use the Project Web App user interface
- Log in to Project Web App from the workstation of another user
- Become familiar with Project Server ribbon navigation
- Use the new grid objects in Project Web App pages
- Access the Project Web App administration features

Module 3: Creating System Metadata and Calendars

This module explains how to create custom fields and lookup tables and calendars.

Lessons

- Understanding Metadata Changes: Departments, Project Types, Business Drivers
- Understanding and Creating Custom Enterprise Fields
- Understanding Built-in Fields and Lookup Tables
- Understanding the Resource Breakdown Structure
- Exploring the Health Lookup Table
- Understanding Fields Controlled by Workflow
- Understanding and Creating a Custom Field with Formula
- Understanding Rollup Methods
- Deleting a Custom Field

- Synchronizing Working Time with Project Options
- Importing a Base Calendar

Lab : Creating System Metadata and Calendars

- Create Teams Lookup Table
- Modify a Lookup Table
- Associate a Field and Lookup Table
- Create Regions Lookup Table
- Create High-Medium-Low Lookup Table
- Modify Cost Type Lookup Table
- Modify the RBS Lookup Table
- Modify Departments Lookup Table
- Create a Free Entry Custom Field
- Create a Project Region Office Field
- Create a Project Risk Field
- Create a Resource Region Field
- Create a Project Low Estimate Field
- Create a Project High Estimate Field
- Create a Formula using Project Professional
- Create a Formula using Project Web App
- Use Graphical Indicators
- Set Indicators in Project Professional
- Import Additional Fields
- Match Generic Resources
- Modify the Standard Calendar
- Create a New Base Calendar

After completing this module, students will be able to:

- Understand project types
- Understand department filtering
- Understand the importance of custom enterprise fields
- Edit built-in lookup tables
- Create a custom lookup table
- Create custom enterprise fields using lookup tables, formulas, and graphical indicators
- Edit custom enterprise fields and lookup tables
- Delete custom enterprise fields and lookup tables
- Set the working schedule on the enterprise standard calendar
- Create custom enterprise base calendars
- Import a base calendar from a non-enterprise project

Module 4: Configuring Lifecycle Management

This module explains how to use and create Enterprise Project Types, workflows, project templates and provides an overview of demand management scenarios.

Lessons

- Understanding Lifecycle Management
- Understanding Demand Management
- Understanding Decision Management
- Understanding Project Types
- Understanding Departments
- Understanding Phases and Stages
- Understanding Project Detail Pages
- Understanding Lifecycle Configuration Process
- Understanding a Proposal Lifecycle
- Understanding the Project Strategic Impact Web Part
- Configuring Workflow Phases
- How to Create Enterprise Templates

- How to Adapt a Workflow for your Needs
- How to Configure Project Workflow Settings

Lab : Configuring Lifecycle Management

- Create Business Drivers
- Create a New Sample Proposal
- Approve a Sample Proposal
- Create Fields for Project Type
- Create Training Overview Page
- Create Additional Project Detail Pages
- Configure Workflow Stages
- Import a Project Template
- Create Enterprise Project Types

After completing this module, students will be able to:

- Understand Lifecycle Management
- Understand Demand Management
- Understand Decision Management
- Understand the configuration process for Lifecycle Management
- Create and manage new Enterprise Project Types
- Create Project Detail Pages (PDPs)
- Create new Phases and Stages
- Understand the Sample workflow
- Create and Manage Dynamic workflows

Module 5: Building and Managing the Enterprise Resource Pool

This module explains how to build and manage the Enterpriser Resource Pool.

Lessons

- Enterprise Resource Pool Overview
- Understanding Enterprise vs. Local Resources
- Understanding Enterprise Resource Types
- How to Edit Resources using Project Professional 2010
- Understanding Booking Types
- How to Change Working Time
- How to Enter Nonworking Time
- How to Enter Cost Information
- Understanding Generic Resources
- How to Create Material Resources
- Understanding and Using Cost Resources
- Understanding Team Resources
- Using Project Web App to Create an Enterprise Resource
- How to Set Assignment Attributes Option
- How to Add a Resource to a Team
- How to Bulk Edit Enterprise Resources
- How to Batch Edit Enterprise Resources
- Using Active Directory Synchronization
- How to Add Resources from the Active Directory
- How to Deactivate an Enterprise Resource

Lab : Building and Managing the Enterprise Resource Pool

- Create a Resource
- Set Work Schedule Changes
- Change Cost Rates
- Create a Generic Resource
- Create a Material Resource
- Create a Cost Resource

- Create a Team Resource
- Import Resources

After completing this module, students will be able to:

- Understand the importance and purpose of the Enterprise Resource Pool
- Understand the difference between enterprise and local resources
- Understand resource types
- Create Work, Material, Generic, Cost, and Team resources
- Open the Enterprise Resource Pool and check out resources
- Edit existing enterprise resources
- Mass edit enterprise resources from the Resource Center
- Prepare resource data for import into the Enterprise Resource Pool
- Import resource data
- Deactivate enterprise resources

Module 6: Initial Project Server Configuration

This module explains how to configure common settings in Project Server.

Lessons

- Understand Recommended Order for Configuring Project Server 2010
- Using the Additional Server Settings Page
- Using Project Server 2007 Compatibility Mode
- Using Enterprise Settings
- Using Currency Settings
- Using Resource Capacity Settings
- Using the Resource Plan Work Day Section
- Understanding Exchange Server Details
- How to Set Task Mode Settings
- How to Configure Exchange Server Synch
- Understanding and Using Alerts and Reminders
- How to Set Options for the OLAP Cube
- How to Delete an Existing OLAP Database
- How to Configure Event Handlers

Lab : Initial Project Server Configuration

- Set OLAP Cube Options
- Configure OLAP Database
- Build and Verify OLAP Cube
- Add a Link to the Quick Launch Menu
- Edit Links in the Quick Launch Menu

After completing this module, students will be able to:

- Understand the functional approach for configuring Project Server 2010 options
- Set options for Enterprise Features
- Configure Project Server's notification engine
- Configure Exchange Server synchronization
- Set options for OLAP cube building and resource availability information
- Configure custom Event Handlers
- Configure Quick Launch menus

Module 7: Configuring Time and Task Tracking

This module explains how to configure the system for time and tasks tracking.

Lessons

- Understanding Time and Task Tracking Entities
- How to Configure Project Server 2010 for Tracking
- Understanding Timesheet Options
- Understanding Single Entry and Double Entry Modes
- How to Disable Timesheet Functionality
- How to Set the Task Tracking Method
- How to use Percent Complete Method
- Using Actual Work Done and Work Remaining Methods
- Set Up the Timesheet Page

Lab : Configuring Time and Task Tracking

- Define Financial Periods
- Define Time Reporting Periods
- Create Line Classifications
- Set Timesheet Options
- Configure Administrative Time
- Set Task Tracking Method

After completing this module, students will be able to:

- Understand the difference between task tracking and time tracking
- Define financial periods
- Define Timesheet periods
- Configure Timesheet options
- Configure the use of Administrative time
- Specify the default method for tracking task progress

Module 8: Configuring Project Server Security

This module explains how to configure and manage Project Server security and active directory synchronization for groups.

Lessons

- Understanding Organizational Permissions
- Understanding Project Web App Permissions
- Understanding Users vs. Resources
- Understanding Groups and Categories
- Overview of Permissions
- How to Manage Security
- How to use the Add or Edit Category Page
- Recommended Settings for Configuring a Security Category
- How to Delete a Group
- How to Delete a Category
- Using and Managing Security Templates
- Managing Active Directory Synch for Groups

Lab : Configuring Project Server Security

- Modify the My Projects Category
- Modify the Project Managers Group
- Create a New Category
- Create a Security Template
- Create a New Group

After completing this module, students will be able to:

- Understand each aspect of Project Server 2010 security
- Set Organizational permissions
- Manage individual User accounts
- Deactivate a User account
- Understand the relationship between Groups and Categories

- Understand the Allow, Deny, and Not Allow permission states
- Manage security with Groups
- Create a custom Group
- Manage security with Categories
- Create a custom Category
- Use Categories in conjunction with the RBS field
- Set permissions with security templates
- Create a new security template
- Manage Active Directory synchronization for Groups

Module 9: Building the Project Environment

This module explains how to load the Project Server environment with project data.

Lessons

Changing the Status Manager

Lab : Building the Project Environment

- Prepare to Import Projects
- Import a Project
- Publish an Imported Project
- Import Additional Projects
- Change the Project Owner
- Build the OLAP Cube

After completing this module, students will be able to:

- Set permissions with security templates
- Create a new security template
- Manage Active Directory synchronization for Groups

Module 10: Creating and Managing Views

This module explains how to create and manage enterprise views in Project Web App and Project 2010.

Lessons

- Eleven types of Project Web App views
- Creating Gantt Chart formats
- Creating Grouping Formats
- Creating Views in Project Web App
- Anatomy of Project Web App views
- Managing Project Web App views
- Other Types of PWA Views
- Deleting a View
- Understanding Project Client Views
- Working with the Enterprise Global File
- Adding Views to the Enterprise Global
- Using the 4-Step Method to Create a New View
- Creating Useful Enterprise Views

Lab : Creating and Managing Views

- Create a Custom Gantt Format
- Customize a Grouping Format
- Copy a View
- Modify a View
- Create a Grouped View
- Create a Filtered View
- Create a Milestone Task View
- Create a View with Indicators
- Create a Duration Table
- Create a Custom Filter
- Create a Custom View
- Create an Enterprise Publishing View

After completing this module, students will be able to:

- Set permissions with security templates

- Create a new security template
- Manage Active Directory synchronization for Groups

Module 11: Managing Project Sites

This module explains how to manage Project Server collaborative workspaces known as Project Sites.

Lessons

- Introducing SharePoint
- Project Site Provisioning Process
- SharePoint Content Types
- SharePoint Architecture
- SharePoint Storage Hierarchy
- SharePoint Administration
- SharePoint Security
- Project Server to SharePoint Synchronization
- SharePoint Templates and Features
- Project Sites Toolbar Options
- Bulk Update Project Sites
- Customizing Project Sites

Lab : Managing Project Sites

- Project Site Provisioning
- Create a New Blank Site
- Customize Documents Library
- Customize Risks List
- Customize Issues List
- Customize Tasks List
- Customize the Home Page
- Save Site as a Template
- Assign Template to EPT

After completing this module, students will be able to:

- Understand the SharePoint content management model
- Set Project Site provisioning options
- Manage Project Sites and their contents
- Create a new Project Site template

Module 12: Configuring Business Intelligence and Reporting

This module explains how to configure and use SharePoint BI tools for Project Server.

Lessons

- Business Intelligence – The What
- Business Intelligence – The Why
- Business Intelligence – The How
- Analytical Tools
- Traditional vs. Periodic Reporting
- Reporting Architecture Overview
- Relational Database vs. OLAP
- Key Terms
- OLAP Cube Categories
- Business Intelligence Delivery Methods
- Business Intelligence and Reporting
- Primary Microsoft Business Intelligence Tools
- Microsoft SharePoint Excel Services Overview
- Working with Built-in Microsoft Excel Reports
- Sample Reports
- Project Key Performance Indicators
- Dashboard Best Practices
- Dashboard Development Process

Lab : Configuring Business Intelligence and Reporting

- Explore the Business Intelligence Center
- Open Sample Excel Reports
- Create a Custom Report from a Sample Report
- Create an Excel Report from a Template

- Publish a Report
- Use a Data Connection File
- Create a Dashboard Page
- Add Non-Project Server Users as Report Viewers

After completing this module, students will be able to:

- Understand Business Intelligence concepts and apply them to Project Server
- Understand the Business Intelligence Center and the Project Server reporting architecture
- Use the built-in Microsoft Excel assets for Project Server reporting
- Build custom Microsoft Excel reports using the built-in Excel assets
- Build dashboard pages for aggregating various types of reporting content
- Control access to the Business Intelligence Center

Module 13: Installing Project Server 2010

This module explains how to install SharePoint and Project Server.

Lessons

- Understanding the WFE/App Server Installation Process
- Installation Overview
- Minimum Hardware Requirements
- Minimum Software Requirements
- Understanding Service Accounts
- How to Create Domain Global Groups for Reporting
- Understanding Software Prerequisites
- Creating Service App Manually

Lab : Installing Project Server 2010

- Prepare SQL Server
- Add SQL Login for Farm Account
- Prepare SSAS
- Add the Farm Admin to SSAS
- Apply Proxy Server Settings
- Install Prerequisites
- Install SharePoint
- Install Project Server
- Run the Configuration Wizard
- Create a Site Collection
- Create Project Web App

After completing this module, students will be able to:

- Identify hardware and software requirements for a Project Server 2010 installation
- Understand service accounts required for installation and operation
- Configure SQL Server and Analysis Services for SharePoint Server and Project Server
- Install SharePoint Server and Project Server
- Create A Project Server Web App
- Create SharePoint Service Applications Manually

Module 14: Post-Installation Configuration

This module explains how to perform post-installation configuration for SharePoint and ProjectServer.

Lessons

- Understanding the New Service Application Model
- Understanding Service Applications and their Benefits
- Understanding Service Application Proxy and Proxy Groups
- How to Configure Excel Services
- How to Configure the Secure Store Service Application
- How to Configure the Cube Building Service
- Understanding Optional SQL Server Enhancements
- Configuring your New Instance
- Understanding the New Excel Services Application
- Pointing Data Connections to the New Secure Store Target Application
- Using PSCONFIG
- Upgrading and Migrating to Project Server 2010
- Technical and Non-Technical Considerations for Upgrading
- Planning for Project Client Coexistence
- Relinking Project Sites
- Migrating Project Portfolio 2007

Lab : Post-Installation Configuration

- Report Authors Group Access
- Harvest URLs
- Configure Excel Services
- Configure Trusted Data Connections
- Add a Trust File Location
- Generate a New Encryption Key
- Create a Secure Store Target Application
- Install SQL Server Native Client
- Install SQL Management Objects
- Create an SQL Login
- Verify Project Web App
- Log on to Project Professional
- Perform Basic Functional Tests
- Verify Cube Building
- Verify the Business Intelligence Center
- Create Additional Instances
- Relink Project Sites

After completing this module, students will be able to:

- Configure Excel Services and PerformancePoint Services for your new Project Server site
- Configure Secure Store Services for Reporting
- Install the SQL Server Native Client and Analysis Management Objects
- Tune SQL Server for best performance
- Verify Project Server Functionality

Module 15: Managing Project Server Day to Day

This module explains how to use many resources and techniques to manage, tune and troubleshoot the Project Server environment.

Lessons

- Performing Database Management through PWA
- Deleting an Enterprise Resource
- Deleting Status Report Responses
- Deleting Timesheets
- Deleting User Delegates
- Performing Manual Admin Backups
- Using Administrative Restore
- Changing or Restarting Workflows
- Configuring and Managing the Queue

- Understanding the Queue Process
- Understanding Queue Optimization
- Understanding Job States
- Managing Queue Jobs Page
- Troubleshooting the Queue
- Configuring the Queue
- Monitoring Project Server Licenses
- Working with Unified Logging Service
- Using the Reliability and Performance Monitor
- SQL Server 2008 Maintenance Plan
- Enabling SharePoint Developer Dashboard
- Using PSCONFIG
- Using SharePoint Health Analyzer
- Adjusting Active Cache Settings
- Cleaning Up the Local Cache
- Resolving Local Cache Corruption
- SharePoint Farm Backup and Recovery
- Backing Up Site Collections
- Backing Up Sites and Lists
- Unattached Content Database Data Recovery

Lab : Managing Project Server Day to Day

- Check in Enterprise Objects
- Delete an Enterprise Object
- Perform Automatic Daily Backup

After completing this module, students will be able to:

- Check in enterprise objects such as projects and resources
- Clean up the Project Server database
- Backup and restore a single project
- Configure and manage the Queue
- Monitor Project Server licenses
- Monitor server health
- Set up and schedule a SQL Server Database Maintenance Plan
- Run a SQL Server Database Maintenance Plan
- Work with the ULS logs
- Backup and Restore a Farm
- Backup and Restore a Site Collection
- Enable and Use the Developer Dashboard

Course Inclusions:

- Microsoft Official Curriculum (MOC) and/or Wizards Learning Courseware (WLC)
- Microsoft Certified Trainer (MCT)
- Lunch, AM and PM Snacks
- Certificate of Achievement
- Course Notes