WIZARDSGROUP

Microsoft Partner
Gold Learning
Gold Business Intelligence
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Course 55034A: Microsoft Project Server 2013 Inside Out

Five days, instructor-led

About this Course

This 5-day Instructor Lead course how to work with Microsoft Project Server 2013. You will also create and management projects and schedules, resources, tasks and timesheets with Project Web App. Create and configure Business Intelligence for customized project reporting. Other topics include how to backup and restore and troubleshoot Project Server 2013.

Audience Profile

This course is intended for anyone that will need to manage and use Project Server 2013. This includes the IT Administrators, Project Managers, Project Schedulers, Managers, Supervisors, Team Leads, Consultants and other people responsible for managing projects. Also anyone responsible for scheduling, estimating, coordinating, controlling, budgeting and staffing of projects and supporting Microsoft Project Server 2013.

At Course Completion

After completing this course, students will be able to:

- Use and work with Project Server 2013 features.

Pre-requisite

Before attending this course, students must have:

- Experience with managing projects using Microsoft Project as well as fundamental understanding of basic project management concepts and terminology.

Course Outline

Module 1: Overview

A simple introduction module.

After completing this module, students will be able to:

- Understand your course, classroom, classmates, facility and instructor.

Module 2: Architecture, Installation and Upgrade

In this module you will be introduced to Project Server 2013 features and architecture and a brief review of the Microsoft Enterprise Project Management (EPM) stack. You will also learn how to install Project Server 2013 and upgrade older Project Server 2010 instances.

Lessons

- Architecture
- Introduction
- Installation
- Upgrading

Lab : Installing Project Server 2013

- Install Project Server
- Configure Project Server
- Create a Project Web Access Site

After completing this module, students will be able to:

- Understand the Microsoft EPM solution stack
- Describe the new features of Project Server 2013
- Describe the architecture of Project Server 2013
- How to install Project Server 2013
- How to setup and configure a Project Web App site
- How to upgrade a Project Server 2010 instance to Project Server 2013

Module 3: Setup and Administer Project Web Access

In this module you will learn about Project Web App (PWA). You will learn about the different areas of the PWA site and what each are used for, what steps are required when starting with a new PWA site (such as cost types, departments and resources) and lastly how to configure the various branding aspects of PWA.

Lessons

- Configure Project Web Access
- Customizing Project Web App
- Project Web Access

Lab : Exploring Project Web Access

- Exploring the New Project Web Access
- Adding Quick Launch Items
- Creating Cost Types
- Creating Departments
- Creating Resources
- Importing Resources
- Creating a New Project
- Project Detail Pages
- Creating Teams
- Creating Project Tasks
- Checking In\Out Projects
- Setup Project 2013 Integration
- Connecting to Project Server
- Importing Projects
- Importing Resources and Fields
- Creating Projects from a SharePoint List
- Exploring My Tasks aggregation
- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats
- Alerts and Reminders
- Additional Server Settings
- Server Side Event handlers
- Project Site Provisioning Settings
- Bulk Update Connected SharePoint Sites
- Project Workflow Settings

Lab : Creating Cost Types and Departments

- Exploring the New Project Web Access
- Adding Quick Launch Items
- Creating Cost Types
- Creating Departments
- Creating Resources
- Importing Resources
- Creating a New Project
- Project Detail Pages
- Creating Teams
- Creating Project Tasks

- Checking In\Out Projects
- Setup Project 2013 Integration
- Connecting to Project Server
- Importing Projects
- Importing Resources and Fields
- Creating Projects from a SharePoint List
- Exploring My Tasks aggregation
- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats
- Alerts and Reminders
- Additional Server Settings
- Server Side Event handlers
- Project Site Provisioning Settings
- Bulk Update Connected SharePoint Sites
- Project Workflow Settings

Lab : Creating Resources

- Exploring the New Project Web Access
- Adding Quick Launch Items
- Creating Cost Types
- Creating Departments
- Creating Resources
- Importing Resources
- Creating a New Project
- Project Detail Pages
- Creating Teams
- Creating Project Tasks
- Checking In\Out Projects
- Setup Project 2013 Integration
- Connecting to Project Server
- Importing Projects
- Importing Resources and Fields
- Creating Projects from a SharePoint List
- Exploring My Tasks aggregation
- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats
- Alerts and Reminders
- Additional Server Settings
- Server Side Event handlers
- Project Site Provisioning Settings
- Bulk Update Connected SharePoint Sites
- Project Workflow Settings

Lab : Creating Projects and Tasks

- Exploring the New Project Web Access
- Adding Quick Launch Items
- Creating Cost Types
- Creating Departments
- Creating Resources
- Importing Resources
- Creating a New Project
- Project Detail Pages
- Creating Teams
- Creating Project Tasks
- Checking In\Out Projects
- Setup Project 2013 Integration
- Connecting to Project Server
- Importing Projects
- Importing Resources and Fields
- Creating Projects from a SharePoint List
- Exploring My Tasks aggregation
- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats

- Alerts and Reminders
- Additional Server Settings
- Server Side Event handlers
- Project Site Provisioning Settings
- Bulk Update Connected SharePoint Sites
- Project Workflow Settings

Lab : Customizing Project Web Access

- Exploring the New Project Web Access
- Adding Quick Launch Items
- Creating Cost Types
- Creating Departments
- Creating Resources
- Importing Resources
- Creating a New Project
- Project Detail Pages
- Creating Teams
- Creating Project Tasks
- Checking In\Out Projects
- Setup Project 2013 Integration
- Connecting to Project Server
- Importing Projects
- Importing Resources and Fields
- Creating Projects from a SharePoint List
- Exploring My Tasks aggregation
- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats
- Alerts and Reminders
- Additional Server Settings
- Server Side Event handlers
- Project Site Provisioning Settings
- Bulk Update Connected SharePoint Sites
- Project Workflow Settings

Lab : Managing Operational Policies

- Exploring the New Project Web Access
- Adding Quick Launch Items
- Creating Cost Types
- Creating Departments
- Creating Resources
- Importing Resources
- Creating a New Project
- Project Detail Pages
- Creating Teams
- Creating Project Tasks
- Checking In\Out Projects
- Setup Project 2013 Integration
- Connecting to Project Server
- Importing Projects
- Importing Resources and Fields
- Creating Projects from a SharePoint List
- Exploring My Tasks aggregation
- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats
- Alerts and Reminders
- Additional Server Settings
- Server Side Event handlers
- Project Site Provisioning Settings
- Bulk Update Connected SharePoint Sites
- Project Workflow Settings

After completing this module, students will be able to:

- Describe the various areas of Project Web App
- Create Cost Types
- Create Departments
- Create Resources
- Create Projects and Tasks

- Import Projects and Resources
- Customize Project Web Access

Module 4: Permissions and Security

In this module you explore the permissions modes of Project Server 2013. This includes the new SharePoint Permission mode and the older Project Server permission mode. Project Server permission mode includes the review of Categories, Templates and Resource Breakdown Structures (RBS) and how each interacts with user project visibility.

Lessons

- Permissions And Security

Lab : SharePoint Permission Mode

- Explore SharePoint Permission Mode
- Default SharePoint Project Groups
- Adding Users To Groups
- Switching to Project Server Permission Mode
- Creating and Managing Users
- Creating and Managing Groups
- Creating and Managing Categories
- Creating and Managing Security Templates
- Global Permission Settings
- Switching to SharePoint Permission Mode
- Creating Resource Breakdown Structure (RBS)
- Assigning RBS to Resources
- Exploring Resource Breakdown Structure permissions
- Explore RBS Project Visibility

Lab : Project Server Permission Mode

- Explore SharePoint Permission Mode
- Default SharePoint Project Groups
- Adding Users To Groups
- Switching to Project Server Permission Mode
- Creating and Managing Users
- Creating and Managing Groups
- Creating and Managing Categories
- Creating and Managing Security Templates
- Global Permission Settings
- Switching to SharePoint Permission Mode
- Creating Resource Breakdown Structure (RBS)
- Assigning RBS to Resources
- Exploring Resource Breakdown Structure permissions
- Explore RBS Project Visibility

Lab : Creating Resource Breakdown Structure (RBS)

- Explore SharePoint Permission Mode
- Default SharePoint Project Groups
- Adding Users To Groups
- Switching to Project Server Permission Mode
- Creating and Managing Users
- Creating and Managing Groups
- Creating and Managing Categories
- Creating and Managing Security Templates
- Global Permission Settings
- Switching to SharePoint Permission Mode
- Creating Resource Breakdown Structure (RBS)
- Assigning RBS to Resources
- Exploring Resource Breakdown Structure permissions
- Explore RBS Project Visibility

After completing this module, students will be able to:

- Describe Permission and Security feature of Project Server
- How to use SharePoint Permission Mode

- How to use Project Server Permission Mode
- Describe and work with Categories
- Describe and work with Templates
- How to define and assign Resource Breakdown Structures

Module 5: Enterprise Custom Calendars, Fields and Lookup Tables

In this module you will learn to create and manage Enterprise Calendars, Custom Fields and Lookup Tables.

Lessons

- Lookup tables
- Enterprise Custom Fields

Lab : Enterprise Custom Fields and Lookup Tables

- Enterprise Custom Fields (Resource)
- Enterprise Custom Fields (Project)
- Enterprise Custom Fields (Task)
- Create Baselines
- Custom Field Formulas
- Graphical Indicators
- Rollup and Roll-down Custom Fields
- Creating and Managing Enterprise Custom Lookup Tables
- Create Team Name Lookup Table
- Create Skill Lookup Table

After completing this module, students will be able to:

- Describe and use Enterprise Calendars
- Describe and use Enterprise Custom Fields
- Understand how to create Custom Field formulas
- Describe and use Enterprise Custom Lookup Tables

Module 6: Time and Task Management

In this module you will learn how to use Project Server to perform Time and Task management. This includes defining Fiscal Periods, managing timesheets, requesting status reports and managing resource allocations.

Lessons

- Time Management
- Task Management

Lab : Working With Project Schedules

- Creating and Managing Enterprise Calendars
- Defining Fiscal Periods
- Time Reporting Periods
- Line Classifications
- Timesheet settings and defaults
- Administrative Time
- Task Settings and Display
- Managing Delegates
- Acting as a Delegate
- Building Teams of Resources
- Using Generic Resources
- Mapping Resources to Teams
- Assigning and Managing Team Tasks
- Managing Tasks by Team Members
- Self-Assigning Team Tasks
- Reassigning Tasks
- Assigning Resources to Tasks
- Matching and Replacing Resources
- Working with Resource Options
- Using Resource Plans
- Managing Over allocations
- Displaying Over allocations on Existing Assignments
- Resource Availability
- Working with Team Planner
- Using the Resource Substitution Wizard
- Leveling Enterprise Resources
- Managing Out of Office Situations

- Working with Administrative Time
- Creating and Managing Timesheets
- Adding Rows to Timesheet
- Updating Timesheets
- Entering Time and Adding Comments
- Submitting Time for Approval
- Adding Timesheet Managers
- Receiving and Reviewing Timesheets
- Viewing Update History
- Setting a Project Baseline
- Comparing Project Baselines
- Working with Tracking Methods
- Using Percent of Work Complete
- Using Hours of work done per period
- Using Actual work done and work remaining
- Integrate Exchange Server 2013
- Out of Office Synchronization
- Sync to Outlook
- Working with My Tasks

Lab : Integrating Exchange

- Creating and Managing Enterprise Calendars
- Defining Fiscal Periods
- Time Reporting Periods
- Line Classifications
- Timesheet settings and defaults
- Administrative Time
- Task Settings and Display
- Managing Delegates
- Acting as a Delegate
- Building Teams of Resources
- Using Generic Resources
- Mapping Resources to Teams
- Assigning and Managing Team Tasks
- Managing Tasks by Team Members
- Self-Assigning Team Tasks
- Reassigning Tasks
- Assigning Resources to Tasks
- Matching and Replacing Resources
- Working with Resource Options
- Using Resource Plans
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- Integrate Exchange Server 2013
- Out of Office Synchronization
- Sync to Outlook
- Working with My Tasks

Lab : Time and Task Management

- Creating and Managing Enterprise Calendars
- Defining Fiscal Periods
- Time Reporting Periods
- Line Classifications

- Timesheet settings and defaults
- Administrative Time
- Task Settings and Display
- Managing Delegates
- Acting as a Delegate
- Building Teams of Resources
- Using Generic Resources
- Mapping Resources to Teams
- Assigning and Managing Team Tasks
- Managing Tasks by Team Members
- Self-Assigning Team Tasks
- Reassigning Tasks
- Assigning Resources to Tasks
- Matching and Replacing Resources
- Working with Resource Options
- Using Resource Plans
- Managing Over allocations
- Displaying Over allocations on Existing Assignments
- Resource Availability
- Working with Team Planner
- Using the Resource Substitution Wizard
- Leveling Enterprise Resources
- Managing Out of Office Situations
- Working with Administrative Time
- Creating and Managing Timesheets
- Adding Rows to Timesheet
- Updating Timesheets
- Entering Time and Adding Comments
- Submitting Time for Approval
- Adding Timesheet Managers
- Receiving and Reviewing Timesheets
- Viewing Update History
- Setting a Project Baseline
- Comparing Project Baselines
- Working with Tracking Methods
- Using Percent of Work Complete
- Using Hours of work done per period
- Using Actual work done and work remaining
- Integrate Exchange Server 2013
- Out of Office Synchronization
- Sync to Outlook
- Working with My Tasks

Lab : Advanced Task Assignments

- Creating and Managing Enterprise Calendars
- Defining Fiscal Periods
- Time Reporting Periods
- Line Classifications
- Timesheet settings and defaults
- Administrative Time
- Task Settings and Display
- Managing Delegates
- Acting as a Delegate
- Building Teams of Resources
- Using Generic Resources
- Mapping Resources to Teams
- Assigning and Managing Team Tasks
- Managing Tasks by Team Members
- Self-Assigning Team Tasks
- Reassigning Tasks
- Assigning Resources to Tasks
- Matching and Replacing Resources
- Working with Resource Options
- Using Resource Plans
- Managing Over allocations
- Displaying Over allocations on Existing Assignments
- Resource Availability
- Working with Team Planner
- Using the Resource Substitution Wizard
- Leveling Enterprise Resources
- Managing Out of Office Situations
- Working with Administrative Time
- Creating and Managing Timesheets

- Adding Rows to Timesheet
- Updating Timesheets
- Entering Time and Adding Comments
- Submitting Time for Approval
- Adding Timesheet Managers
- Receiving and Reviewing Timesheets
- Viewing Update History
- Setting a Project Baseline
- Comparing Project Baselines
- Working with Tracking Methods
- Using Percent of Work Complete
- Using Hours of work done per period
- Using Actual work done and work remaining
- Integrate Exchange Server 2013
- Out of Office Synchronization
- Sync to Outlook
- Working with My Tasks

Lab : Working With Timesheets

- Creating and Managing Enterprise Calendars
- Defining Fiscal Periods
- Time Reporting Periods
- Line Classifications
- Timesheet settings and defaults
- Administrative Time
- Task Settings and Display
- Managing Delegates
- Acting as a Delegate
- Building Teams of Resources
- Using Generic Resources
- Mapping Resources to Teams
- Assigning and Managing Team Tasks
- Managing Tasks by Team Members
- Self-Assigning Team Tasks
- Reassigning Tasks
- Assigning Resources to Tasks
- Matching and Replacing Resources
- Working with Resource Options
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- Using Actual work done and work remaining
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- Sync to Outlook
- Working with My Tasks

Lab : Assigning and Working With Resources

- Creating and Managing Enterprise Calendars
- Defining Fiscal Periods
- Time Reporting Periods
- Line Classifications
- Timesheet settings and defaults
- Administrative Time

- Task Settings and Display
- Managing Delegates
- Acting as a Delegate
- Building Teams of Resources
- Using Generic Resources
- Mapping Resources to Teams
- Assigning and Managing Team Tasks
- Managing Tasks by Team Members
- Self-Assigning Team Tasks
- Reassigning Tasks
- Assigning Resources to Tasks
- Matching and Replacing Resources
- Working with Resource Options
- Using Resource Plans
- Managing Over allocations
- Displaying Over allocations on Existing Assignments
- Resource Availability
- Working with Team Planner
- Using the Resource Substitution Wizard
- Leveling Enterprise Resources
- Managing Out of Office Situations
- Working with Administrative Time
- Creating and Managing Timesheets
- Adding Rows to Timesheet
- Updating Timesheets
- Entering Time and Adding Comments
- Submitting Time for Approval
- Adding Timesheet Managers
- Receiving and Reviewing Timesheets
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- Comparing Project Baselines
- Working with Tracking Methods
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- Using Actual work done and work remaining
- Integrate Exchange Server 2013
- Out of Office Synchronization
- Sync to Outlook
- Working with My Tasks

After completing this module, students will be able to:

- Describe the Task and Time management features of Project Server
- Learn to create and manage Fiscal Periods
- Learn to manage Timesheets
- Understand how Exchange 2013 integrates with Project Server
- Understand how to use the "My Tasks" feature of SharePoint 2013

Module 7: Business Intelligence and Reporting

In this module you will learn about many of the Business Intelligence and Reporting features of Project Server 2013. This includes the default set of Excel Services Reports and how to use the more advanced reporting features like Analysis Services, PowerPivot and PerformancePoint.

Lessons

- Managing Reports
- Common Errors
- Business Intelligence Features

Lab : Configure Business Intelligence

- Configure SQL Server Login
- Install Analysis Services
- Install SQL Server AMO
- Configure Excel Services
- Configure Secure Store
- Configure PerformancePoint
- Setup Report Authors and Report Viewers
- Working with Business Intelligence Center
- Exploring Project Server Database Tables
- Working with Sample Excel Reports

- Uploading Excel Report in the Project Site
- Creating Dashboard Reports
- Adding PWA Web Parts
- Creating Excel Services Reports
- Creating PerformancePoint Reports
- Creating Reporting Services Reports
- Creating Analysis Services Reports

Lab : Reports and Dashboards

- Configure SQL Server Login
- Install Analysis Services
- Install SQL Server AMO
- Configure Excel Services
- Configure Secure Store
- Configure PerformancePoint
- Setup Report Authors and Report Viewers
- Working with Business Intelligence Center
- Exploring Project Server Database Tables
- Working with Sample Excel Reports
- Uploading Excel Report in the Project Site
- Creating Dashboard Reports
- Adding PWA Web Parts
- Creating Excel Services Reports
- Creating PerformancePoint Reports
- Creating Reporting Services Reports
- Creating Analysis Services Reports

After completing this module, students will be able to:

- Describe the Business Intelligence and Reporting features of Project Server
- Describe the default reports in the ProjectBICenter site
- How to setup and use the Analysis Services feature
- How to create customized Reports and Dashboards
- How to use BI related web parts
- How to use Excel Services, PerformancePoint, Reporting Services and Analysis Services for reporting

Module 8: Project Sites

In this module you explore the features of a Project Site connected to SharePoint. This includes how to work with and manage Document libraries and the various SharePoint list types (Tasks, Risks and Issues, Discussion, Contacts and Calendars).

Lessons

- Managing Project Sites

Lab : Working With Project Sites

- Creating Document Libraries
- Creating and Managing Documents
- Editing Document Properties
- Enabling Document Version and Check-in/Check-out
- Linking Documents to Tasks
- Creating and Managing Risks and Issues
- Editing and Linking Risks and Issues
- Creating and Managing Deliverables (PWA and Project)
- Linking Deliverables to a Task
- Managing Discussion Groups
- Managing Contacts
- Managing Calendars

After completing this module, students will be able to:

- Describe the features of a Project Site
- How to create and manage Project Sites
- How to manage Project Site Lists

Module 9: Backup and Recovery

In this module you explore how to Backup and Restore Project Web App and the projects stored on it. You also review how to backup Project Sites tied to the Projects.

Lessons

- Backup
- Recovery

Lab : Backup and Recovery

- Backup Project Server
- Restore Project Server

After completing this module, students will be able to:

- Describe the backup and restore process
- How to Backup Project Server and Projects
- How to Restore Project Server and Projects
- How to Backup and Restore Project Sites

Module 10: Troubleshooting and Maintenance

In this module you will learn how to troubleshoot and maintain Project Server. This includes deleting Enterprise Objects, managing the Project Server queue, and reading the ULS logs.

Lessons

- Maintaining Project Server
- Troubleshooting

Lab : Troubleshooting and Maintenance

- Deleting Enterprise Objects
- Changing or Restarting Workflows
- Troubleshooting and Managing Project Server Queue
- Reviewing ULS Logs

After completing this module, students will be able to:

- Delete Project Server Enterprise Objects
- Troubleshoot workflows
- Troubleshoot the Project Server Queue
- Review ULS logs for issues

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