

Project Server 2013 Inside Out

Module 1: Overview

- A simple introduction module.

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

- Introduction
- Architecture
- Installation
- Upgrading

Lab 1: Installing Project Server 2013

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

Lab 2: Upgrade Project Server 2010

- Upgrade Project Server 2010 database

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

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

Lab 1: Exploring Project Web Access

- Exploring the New Project Web Access
- Adding Quick Launch Items

Lab 2: Creating Cost Types and Departments

- Creating Cost Types
- Creating Departments

Lab 3: Creating Resources

- Creating Resources
- Importing Resources

Lab 4: Creating Projects and Tasks

- 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

Lab 5: Creating Master Projects

- Creating a New Master Project
- Create Sub Projects
- Assigning project team members (PWA)
- Assigning project team members (Project)
- Create temporary master project

- Configure project dependencies

Lab 6: Customizing Project Web Access

- Creating and Managing Views
- Working with Groupings
- Working with Filters
- Editing and Copying Existing Views
- Applying Views
- Grouping Formats
- Gantt Chart Formats

Lab 7: Managing Operational Policies

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

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 1: SharePoint Permission Mode

- Explore SharePoint Permission Mode
- Default SharePoint Project Groups
- Adding Users To Groups

Lab 2: Project Server Permission Mode

- 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

Lab 3: Creating Resource Breakdown Structure (RBS)

- Creating Resource Breakdown Structure (RBS)
- Assigning RBS to Resources
- Exploring Resource Breakdown Structure permissions
- Explore RBS Project Visibility

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

- Enterprise Custom Fields
- Lookup tables

Lab 1: 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

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

- Task Management
- Time Management

Lab 1: 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

Lab 2: Advanced Task Assignments

- 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

Lab 3: Assigning and Working With Resources

- 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

Lab 4: Working With Timesheets

- 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
- Rejecting and Approving Timesheets
- Viewing timesheet impacts
- Viewing Update History

Lab 5: Working With Project Schedules

- 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

Lab 6: Creating Project Workflows

- Create Project Detail Pages
- Create Workflow Stages
- Create and Assign Workflows
- Restart Workflows

Lab 7: Integrating Exchange

- Integrate Exchange Server 2013
- Out of Office Synchronization
- Sync to Outlook
- Working with My Tasks

Module 7: 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 1: Working With Project Sites

- Exploring 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 Contacts
- Managing Calendars
- Modify Site Layout
- Working with Social Elements
- Exploring Office Apps
- Creating subsites for master-sub projects

Module 8: 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

- Portfolio Analysis
- Business Intelligence Features
- Managing Reports
- Common Errors

Lab 1: Configure Business Intelligence

- Setup Report Authors and Report Viewers
- Configure SQL Server Login
- Install Analysis Services
- Install SQL Server AMO
- Configure Excel Services
- Configure Secure Store
- Configure PerformancePoint

Lab 2: Reports and Dashboards

- 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 3: Managing Strategy Drivers

- Create Strategy Drivers
- Create Driver Prioritization
- Perform Portfolio Analyses

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 1: Backup and Recovery

- Backup Project Server (Database)

- Backup Project Server (Content)
- 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 1: Troubleshooting and Maintenance

- Deleting Enterprise Objects
- Connected SharePoint Sites
- Managing Project Server Queue
- Reviewing ULS Logs