



Course on Managing Projects and Programs(70-634)

Overview

This five-day instructor-led course provides students with the knowledge and skills to use the Microsoft Office Project Server 2007 enterprise tool to initiate, plan, execute, monitor and control, and close enterprise programs and to customize the enterprise environment.

This is the third course in the Microsoft Office Project 2007 Official Curriculum series and addresses the Microsoft Office Enterprise Project Management (EPM) Solution.

Intended Audience

This course is intended for project managers, program managers, members of the project management office, or participants in the deployment of an EPM solution, who are responsible for managing, analyzing, and reporting on projects and programs in the Microsoft Office EPM environment. Further, these individuals are able to refine the Office EPM environment to create solutions to business problems. A solid understanding of key project management concepts and terminology as found in the Project Management Institute (PMI), A Guide to the Project Management Body of Knowledge (PMBOK Guide), Third Edition, and The Standard for Program Management is recommended. Additionally, substantial hands-on experience is recommended in Microsoft Office Project Professional 2007, Project Server 2007, and Project Web Access prior to attending the course.

Prerequisites

Before attending this course, students must have:

- Fundamental knowledge of project management.
- Experience using Microsoft Office Project to create project schedules.
- Experience using Microsoft Office Project Web Access.
- Experience with Microsoft Office Project Server, preferably Office Project Server 2007.
- Experience with the Windows XP or Windows Vista operating system.
- Experience with Microsoft Office Excel 2003 or 2007.
- In addition, it is recommended, but not required, that students have:
 - Familiarity with the key project management concepts and terminology found in the PMI PMBOK Guide – Third Edition.
 - Familiarity with the key program management concepts and terminology found in PMI's The Standard for Program Management.
 - Completed MOC Course 5927: Microsoft Office Project 2007, Managing Projects.
 - Completed MOC Course 5928: Microsoft Office Project Server 2007, Managing Projects.

Key Skills

Upon successful completion of this course, learners will be able to:



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- Define project, program, and portfolio management and explain their interrelationships in an enterprise environment.
- Describe the architecture and components of the Microsoft Office Enterprise Project Management Solution and navigate the key interfaces of Office Project 2007, Project Server 2007, and Project Web Access.
- Define a standardized methodology for program governance.
- Propose and apply updates to an enterprise environment.
- Define a program by establishing its characteristics and parameters and delineate program benefits.
- Deliver the detailed plan of a program and optimize the program for time, cost, and resources in order to establish a program baseline.
- Define program resources, and after identifying the critical resources, review and update the program plan and baseline.
- Track the work of the program resources in timesheets and the task progress of the program in Project Web Access and Project 2007.
- Define Earned Value Management (EVM) and perform EVM, including metrics, variances, and performance indexes, in order to create forecasts and make effective adjustments to the program.
- Use Project Center and the Data Analysis (OLAP Cube) feature to view and report the status of a program and to make forecasts.
- Configure project workspaces to meet the needs of a program.
- Describe the closing process for a program and propose changes to the enterprise environment based on the lessons learned through a program life cycle.

Instructional method

This instructor-led course provides classroom lecture topics and the practical application of MS Office Project 2007 through demonstrations, practices, and hands-on exercises

Course length

8-days instructor-led training

Course Outline

Module 1: Managing Enterprise Projects, Programs, and Portfolios

This module defines and explains project, program, and portfolio management, their interrelationships, and how they work and are managed in an enterprise. Participants will be able to describe general program management standards and define general program management terminology.

Lessons



- Managing Projects, Programs, and Portfolios in an Enterprise.
- Understanding Program Management Standards and Terminology.

No Lab

After completing this module, students will be able to:

- Define projects, programs, and portfolios and how they are managed in an enterprise.
- Explain program management standards and terminology.

Module 2: Working with the Enterprise Project Management Solution 2007

This module explores the features, benefits, components, and architecture of the Office EPM Solution. Also, the different client interfaces that are available as part of Microsoft Office Project Server 2007 are described and demonstrated so that you can become familiar with techniques for navigating the interfaces as various users.

Lessons

- Understanding the EPM Solution 2007.
- Navigating the EPM Solution Interfaces.

Lab: Working with the EPM Solution

- Reviewing the Project Center.
- Reviewing Project Details.
- Reviewing the Resource Center.
- Reviewing Project Workspaces.

After completing this module, students will be able to:

- Describe the architecture and components of the Office EPM Solution 2007.
- Navigate the key interfaces of Microsoft Office Project 2007, Microsoft Office Project Server 2007, and Microsoft Office Project Web Access.

Module 3: Program Management

This module explains how to define a standardized methodology for program management. It also defines the necessary policies, procedures, and required infrastructures to establish program management properly in enterprise organizations.

Lessons

- Understanding Program Management.
- Program Management in the Organization.
- Defining Policies and Procedures for Program Management.
- Program Life Cycle Process and Phases.

No Lab

After completing this module, students will be able to:

- Define program management.
- Describe program management in the organization.
- Define the policies and procedures for program management.



- Describe the program life cycle process and phases.

Module 4: Defining and Creating the Enterprise Environment

This module explains the default configurations in Office Project Server 2007. You will then learn how to propose and apply configuration changes to an enterprise environment as they pertain to program management activities.

Lessons

- Reviewing the Default Settings of Office Project Server 2007.
- Implementing Changes in an Enterprise Environment.

No Lab

After completing this module, students will be able to:

- Describe the default settings for an enterprise environment in Project Server 2007.
- Implement a proposed change in an enterprise environment.

Module 5: Setting Up the Program

This module explains how to establish the characteristics and parameters of a program and define the program benefits in the context of Office Project Server 2007. It also describes how to identify ways to optimize the Project Server 2007 enterprise environment to effectively and efficiently implement and execute your programs.

Lessons

- Working with a Program.
- Customizing Permissions and Enterprise Fields.

Lab 1: Proposing Changes to the Enterprise Environment

- Proposing Changes to the Enterprise Environment.

Lab 2: Updating the Definition of a Program in Office Project Server 2007

- Updating the Definition of a Program in Office Project Server.

After completing this module, students will be able to:

- Create, save, and publish a program.
- Customize permissions and enterprise fields in an enterprise environment.

Module 6: Planning the Program

This module explains how to deliver the detailed plan of a program and optimize the program for time, cost, and resources in order to establish a program baseline in the context of Office Project Server 2007.

Lessons

- Developing a Detailed Plan of the Program.
- Establishing Project Interdependencies in a Program.
- Finalizing the Program Plan.

Lab 1: Adding and Deleting a Project and Resetting the Baseline

- Removing a Project from the Program Plan.
- Adding a New Project to the Program Plan and Creating Appropriate Interdependencies in the Program Plan.
- Resetting the Baseline.

Lab 2: Proposing and Implementing Updates to Improve the Planning Process

- Proposing Changes to the Enterprise Environment to Improve the Planning Process.
- Implementing Changes to Views and Enterprise Fields.

After completing this module, students will be able to:

- Develop a detailed plan of a program in Office Project Server 2007.
- Establish the interdependencies for cross-project deliverables and resource assignments in a program.
- Optimize a program for time, cost, and resources and reset the baseline.

Module 7: Managing the Resources

This module explains how to define program resources and, after identifying the critical resources, review and update the program plan and baseline.

Lessons

- Updating the Enterprise Resource Pool and Replacing Resources.
- Refining the Program Plan by Identifying Critical Resources.

Lab: Updating the Enterprise Resource Pool and Replacing Resources in the Program Plan

- Incorporating New Resources into the Enterprise Resource Pool.
- Updating the Attributes of Enterprise Resources.
- Replacing Generic Resources with Named Resources.

After completing this module, students will be able to:

- Update the enterprise resource pool and replace resources in the program plan.
- Refine the program plan by identifying critical resources and applying necessary changes.

Module 8: Tracking Timesheets and Task Progress

This module explains how to track the work of program resources in timesheets and the task progress of a program in Office Project Web Access and Office Project 2007.

Lessons

- Managing Timesheets and Task Progress.
- Configuring Timesheets and Task Progress.

Lab 1: Proposing Improvements to Timesheet and Task Progress Configurations

- Proposing Improvements to the Timesheet Configuration.
- Proposing Improvements to the Task Progress Configuration.

Lab 2: Reporting Time and Managing Timesheets



- Reporting Time as a Team Member.
- Approving, Rejecting, and Changing Timesheets.

Lab 3: Reporting and Managing Task Progress

- Reviewing and Approving, Rejecting, and Changing Task Progress as a Project Manager.
- Reviewing the Project Progress Reports as a Program Manager.

After completing this module, students will be able to:

- Manage the reporting of work and task progress and identify any timesheet and task progress configuration issues.
- Configure timesheets and task progress in Office Project 2007.

Module 9: Performing Earned Value Management

This module explains how to define Earned Value Management (EVM) and use EVM, including metrics, variances, and performance indexes, to create forecasts and make effective adjustments to a program.

Lessons

- Applying Earned Value Management.
- Using Earned Value Management in Office Project 2007.
- Creating and Modifying Views and Reports for EVM Analysis.

Lab 1: Performing Traditional Earned Value Management

- Establishing a Plan to Develop Earned Value Management in a Project by Hand.
- Calculating Progress Up to a Specific Status Date and the EVM Data Points, Variances, and Indexes.
- Calculating Forecasts.

Lab 2: Performing Earned Value Management

- Reviewing the Project Plan and Setting Earned Value Options.
- Creating PV, EV, and AC Graphics of the Program.

After completing this module, students will be able to:

- Manually apply EVM.
- Establish the settings for EVM to track the progress of a program in Office Project 2007.
- Create and modify views and reports for EVM analysis.

Module 10: Reporting and Analyzing the Program Data

This module explains how to use the Project Center and the Data Analysis (OLAP Cube) features to view and report the status of a program and to make forecasts.

Lessons

- Customizing the Enterprise Fields and Views to Track a Program.
- Working with an OLAP Cube and a Data Analysis View.

Lab 1: Proposing Changes to the Look and Feel of a Program



- Identifying Needed Changes to the Default Views Used for Task and Project Tracking
- Proposing Changes to the Project Center, Project Details, and Enterprise Global Template Views.

Lab 2: Proposing OLAP Cube Configurations

- Proposing OLAP Cube Configurations.

Lab 3: Generating and Modifying Data Analysis Views

- Generating a Data Analysis View.
- Modifying a Data Analysis View.

After completing this module, students will be able to:

- Customize the enterprise fields and views in Project Center, Project Details, and Office Project 2007 to track a program.
- Work with a Data Analysis view and create, configure, and build an underlying OLAP cube.

Module 11: Managing Project Workspaces for Programs and the Queue

This module explains how to configure project workspaces to meet the needs of a program. You will also learn how to properly configure and manage the queue to help you to control and optimize the availability of Office Project Server 2007.

Lessons

- Configuring a Workspace for a Project in a Program.
- Managing the Queue.

Lab: Planning Configuration Changes to a Workspace

- Planning Configuration Changes to a Workspace.
- Applying Configuration Changes to a Workspace.
- Reviewing Configuration Changes to a Workspace.

After completing this module, students will be able to:

- Configure a workspace for a project in a program.
- Describe and configure the Queue.

Module 12: Closing the Program and Refining the Environment

This module explains how to define and apply the closing process for a program and propose and apply changes to the enterprise environment based on the lessons learned through a program life cycle.

Lessons

- Closing and Archiving a Program.
- Refining an Enterprise Environment.

Lab 1: Proposing Changes to an EPM Environment

- Determining the Gaps Between a Current EPM Environment and a Required One.
- Determining the Necessary Modifications to an EPM Environment.



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- Creating and Presenting the Proposal Detailing the Necessary Modifications to the EPM Environment to the Administrator.

Lab 2: Applying Changes to an EPM Environment

- Negotiating Changes Between a Project Server Administrator and a Member of the PMO.
- Applying Necessary Changes to the EPM Environment as a Project Server Administrator.
- Testing Changes to the New Environment.

After completing this module, students will be able to:

- Describe the process of closing and archiving a program.
- Refine an enterprise environment.

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