



TAN DUC INFORMATION TECHNOLOGY SCHOOL JSC

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Let's Reach for Excellence!

Managing Microsoft Project Online

Duration: 03 days

The goal of this three-day course is to provide students with the knowledge and skills necessary to effectively plan, deploy and administer Microsoft Project Online.



AUDIENCE

This course is intended for SharePoint Administrators, Systems Engineers, PMO Managers, Project Managers, Portfolio Analysts, Consultants and other people responsible for the deployment and management of a Microsoft Project and Portfolio Management (PPM) Solution using Project Online.

PREREQUISITES:

Students should have a working knowledge of the following:

- Internet Web Browser.
- Microsoft Project Professional.
- Basic project management concepts.

AT COURSE COMPLETION

After completing this boot camp, students will be able to:

- Deploy Project Online.
- Work with Office 365 Admin Center.
- Configure and manage security.
- Install and configure Project clients.
- Configure and manage time and task management settings.
- Create enterprise custom fields and lookup tables.
- Configure and manage time and task management settings.
- Customize project sites.
- Import projects and resources.
- Create and configure Project Online workflows.
- Share Project Online with external users.
- Work with troubleshooting tools.
- How to create a custom Project Online Power BI Center.

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Module 1: Deploying Microsoft Project Online

This module describes the features and how to install Microsoft Project Online in Office 365. Lessons presented in this module will detail how to create a new Project Online subscription and how to add a service to an existing subscription. You will also learn how to work in the Office 365 Admin Center by adding new users, assigning product licenses and creating and assigning groups to users.

Lessons

- Installing Microsoft Project Online
 - Features of Microsoft Project Online
 - Creating a New Project Online Subscription

- Adding a Service to an Existing Subscription
- Practice: Creating a New Project Online Subscription
- Working with Office 365 Admin Center
 - Adding New Users to Office 365
 - Assigning Product Licenses to Users
 - Creating Groups in Office 365
 - Assigning Office 365 Groups to Users
 - Practice: Working with Office 365 Admin Center

Module 2: Managing Security

This module describes how to manage Project Server security. Lessons presented in this module will cover SharePoint and Project Server permission modes and detail how security works in both permission modes. You will also learn how to create Project Server security users, groups and categories and configuring the various permissions.

Lessons

- Overview of Project Online Security
 - Understanding Permission Modes
 - Security Workflow - SharePoint Permission Mode
 - Security Workflow - Project Server Permission Mode
 - Project Server Security Entities
- SharePoint Security Permissions
 - Default SharePoint Groups
 - Adding Users to SharePoint Groups for PWA
 - Switching Permission Mode
 - Practice: Working with SharePoint Security Permissions
- Project Online Security Permissions
 - Project Online Security Permissions
 - Global Permissions
 - Category Permissions
 - Category Dynamics Rules
 - Security Templates
 - Practice: Working with Project Online Security Permissions
- Creating Project Online Security Principals
 - Creating Project Online Users
 - Understanding Project Online Groups
 - Creating Project Online Groups
 - Understanding Project Online Categories
 - Creating Project Online Groups
 - Practice: Working with Project Online Security Principals

Module 3: Working with Microsoft Project Clients

This module describes how to install on-premises and cloud-based project clients. Lessons presented in this module will detail how to install both Project clients and create Project Online profiles. You will also learn how to access and sign in to Project Web App and how to impersonate users as part of testing and troubleshooting Project Web App.

Lessons

- Overview of Project Clients
 - Overview of Microsoft Project 2016 Clients – On-Premises
 - Overview of Microsoft Project Online Clients – Cloud Based
 - Installing Microsoft Project Professional 2016
 - Installing Microsoft Project Online Professional
 - Practice: Installing Project Online Professional
- Configuring Project Clients
 - Difference between Authentication and Authorization
 - Creating a Project Web App Profile
 - Signing in to Project Online
 - Managing Local Project Cache
 - Practice: Configuring Project Online Professional
- Using Project Web App
 - Configuring User Access to Project Online
 - Signing in to Project Online
 - Using the Run as Different User Option
 - Supported 3rd Party Browsers
 - Practice: Using Project Web App in a Web Browser

Module 4: Configuring Project Online

This module describes how to configure and manage time and task management settings. Lessons presented in this module will detail how time and task reporting work in Project Server, what are financial periods and timesheet settings and how to configure them. You will also learn how to configure Operational Policies and import resources and project plans to Project Online.

Lessons

- Configuring Time and Task Management Settings
 - Configuring Fiscal Periods
 - Configuring Time Reporting Periods
 - Creating Line Classifications
 - Configuring Timesheet Settings and Defaults
 - Configuring Administrative Time

- Configuring Task Settings and Display
- Manage Timesheets
- Timesheet Managers
- Practice: Configuring Time and Task Management Settings
- Configuring Operational Policies
 - Configuring Additional Server Settings
 - Active Directory Enterprise Resource Pool Synchronization
 - Configuring Project Site Creation
 - Configuring Connected SharePoint Sites
 - Practice: Configuring Operational Policies
- Importing Resources and Project Plans
 - Overview of Importing Data
 - Importing Resources to Enterprise
 - Importing Projects to Enterprise
 - Practice: Importing Resources and Project Plans

Module 5: Configuring Enterprise Data Settings

This module describes how to configure the enterprise data settings. Lessons presented in this module will cover how to create and configure enterprise custom fields, and lookup tables. You will also learn about the Resource Breakdown Structure and configuring enterprise calendars and the Enterprise Global Template.

Lessons

- Configuring Enterprise Custom Fields
 - Overview of Custom Fields
 - Enterprise Custom Fields
 - Creating Enterprise Custom Fields
 - Creating Lookup Tables
 - Preconfigured Enterprise Custom Fields
 - Practice: Configuring Enterprise Custom Fields
- Configuring Enterprise Objects
 - Resource Breakdown Structure (RBS)
 - Security Rules and the RBS
 - Configuring Enterprise Calendars
 - Configuring the Enterprise Global Template
 - Practice: Configuring Enterprise Objects

Module 6: Customizing Project Sites

This module describes how to configure, manage and customize Project Sites. Lessons presented in this module will explain how the elements of a Project Sites and how they work together. You will also learn how to create a custom Project Site template to be used in Enterprise Project Types (EPT).

Lessons

- Working with Project Sites and Elements
 - Working with Risks
 - Working with Issues
 - Working with Document Libraries
 - Working with Deliverables
 - Understanding Project Site Permissions
 - Practice: Configuring Project Site Provisioning
- Creating a Custom Project Site Template
 - Customize the Project Site
 - Adding Web Parts to Project Site
 - Adding SharePoint Apps
 - Saving the Project Site as SharePoint Template
 - Practice: Creating a Custom Project Site Template

Module 7: Project Online Administration

This module describes the administrative tasks that a Project Online Administrator will be required to know. Lessons presented in this module will detail how to configure Project Online Workflows, including Phases, Stages, PDPs and EPTs. You will learn how to share Project Online with external users and how to manage Queue Jobs and enterprise objects. You will also learn the various tools available to troubleshoot your Project Online deployment.

Lessons

- Working with Project Online Workflows
 - Overview of Workflows in Project Online
 - Modifying Workflow Phases
 - Creating Workflow Stages
 - Creating Project Detail Pages
 - Creating Enterprise Project Types
 - Creating a Workflow
 - Troubleshooting Project Online Workflows
 - Change or Restart Workflows
 - Practice: Customizing Workflows and PDPs

- Sharing Project Online with External Users
 - Overview of Project / SharePoint B2B Sharing
 - Configuring Sharing on PWA Site Collection
 - Configuring Sharing on Project Web App
 - Adding External Users in PWA
 - Assigning Project Online Licensing for External Users
 - Practice: Sharing Project Online with External Users
- Managing Queue Jobs and Enterprise Objects
 - Manage Queue Jobs
 - Deleting Enterprise Objects
 - Forcing Check-In Enterprise Objects
 - Practice: Working with Enterprise Objects
- Troubleshooting Tools
 - Office 365 Service Health
 - Office 365 Message Center
 - Office 365 Usage Reports
 - Tune Project Online Performance

Hands-On Lab:

How to Create a Project Online Power BI Center

This Hands-On Lab provides the instructions on how to create and share a custom Project Online Power BI Center using your organization's production data.

Exercises:

- Creating a Modern UI SharePoint Site Collection
- Signing Up for a Power BI Account
- Using the Power BI Project Online Content Pack
- Upgrading Free Power BI account to Power BI Pro
- Adding Power BI Reports to a SharePoint Page
- Modifying the Power BI Center Home Page
- Sharing the Power BI Center Site
- Sharing the Power BI Dashboard and Testing