

Project Online Administrator Course



Your learning needs are at
the heart of what we do.





Microsoft Project Online Administrator Course

- MS Project Server vs SharePoint Server Security Models
- Resource Engagements and Requests in Project Online

Project Online Course Prerequisites

This Project Online course is intended for administrators, systems engineers, PMO managers, project managers, consultants and those responsible for the deployment and management of a Microsoft EPM Solution using Project Online.

You will need a good working knowledge of Office 365 / Microsoft 365, Microsoft Office Project Professional (any version) and understand basic project management concepts.

Module 1: Planning the Deployment of MS Project Online

This first module provides the background foundational knowledge needed to plan effectively your deployment of MS Project Online.

- An Introduction to Project Online
- Identifying Requirements in Project Online
- Planning Custom Fields, Views and Reports in Project Online

Module 2: Configuring Project Online

This module covers the configuration of Project Online.

- Provisioning the Project Web Access Site
- Setting the Project Online Security Model

Module 3: Configuring Project Clients in Project Online

This module covers the configuration of clients in Project Online.

- Creating Project Server profiles

Module 4: Defining the Project Server Settings



This fourth module covers the configuration of enterprise data settings, time and task management and operational policies. You will learn how to create and configure enterprise custom fields, calendars and time and task management. You will also configure additional server settings and operational policies.

Configuring Enterprise Data Settings in Project Online

1. Create Enterprise Custom Fields

Resource Breakdown Structure (RBS)

Department Field

2. Configure Enterprise Global template
3. Create Enterprise Calendars

Configuring Operational Policies

4. Configure Additional Server Settings
5. Configure Active Directory Enterprise Resource Pool Synchronization

Module 5: Managing Project Security in Project Online

In this module you will learn how to manage security using the Project Server model. You will find out how Project Server

security works and how to create Project Server security users, groups and categories and how to configure the various permission settings.

Overview of Project Server Security vs SharePoint Security Model

Project Server Security Flowchart

1. Project Server Security Entities
2. Security Permissions
3. Creating Security Templates

Creating Project Server Users

4. Using PWA

Creating Project Server Groups

5. Using PWA
6. Configuring Active Directory Synchronization for Groups

Creating Project Server Categories

7. Using PWA



Module 6: Managing Time and Task Management Settings in Project Online

In this module you will learn how to configure and manage time and task management settings. You will find out how time and task reporting work in Project Server. You will also learn about financial and timesheet periods and how to configure them.

Configuring Time Reporting Periods

1. Financial and Timesheet Periods

Configure Timesheet Settings

2. Configure timesheet line classifications
3. Configure administrative time categories

Configure Task Settings

Module 7: Customizing Project Workspaces in Project Online

This module describes how to configure and manage Project workspaces. Lessons presented in this module will detail how

Project workspaces work, how to create a custom Project Workspace site template and adding and modifying web parts.

Working with Project Workspaces

1. Overview of Project Workspaces
2. Workspace permissions
3. Add and modify Project Web Parts

Creating and Publishing a Custom Project Workspace Site Template

4. Create a Custom Project Workspace Site Template
5. Publish a Custom Project Workspace Site Template

Module 8: Administrating Project Server Tasks in Project Online

Importing Projects and Resources

1. Importing Resources
2. Importing Projects

Creating and Modifying Views

3. Overview of current views
4. Modifying views



5. Creating a Data Analysis view

Working with Administration Tools

Module 9: Configuring Project Server Business Intelligence (BI)

In this module you will learn how to configure the various Business Intelligence platforms that can be used within MS Project Server. You will get an overview of how Project Server Business Intelligence works and you will also discover how to configure Excel Services, Secure Store Service and create a BI dashboard page.

Overview of Project Server Reporting and Report Center

1. Project Server Reporting and Report Center Overview
2. Excel Services Overview
3. PerformancePoint Services Overview
4. Visio Graphics Services Overview
5. Configure SQL Server for Project Server Reporting

Configuring Excel Services

6. Configuring Excel Services Settings
7. Enabling Trusted Locations for Excel Services

8. Managing Excel Services Custom Applications

Configure Secure Store Service

9. Introduction to Excel Services security
10. Planning user authentication
11. Planning communication between servers
12. Planning external data authentication

Creating a Dashboard Page

13. Defining and Configuring Web Parts
14. Working with Key Performance Indicators
15. Defining Filters