

The Complete Reference

Installation checklist
and more available at
mhprofessional.com

Microsoft® Office Project Server 2007

- ▲ Plan and implement a Project Server installation
- ▲ Manage corporate projects and programs across the entire lifecycle
- ▲ Leverage dashboards, desktop components, and workspaces

Rob Stewart

Microsoft Solutions Specialist,
CDW Berbee

Dave Gochberg

MCTS: Enterprise Project
Management with Microsoft
Office Project Server 2007

MCTS: Microsoft Office Project
Server 2007, Managing Projects



Osborne

Contents

Acknowledgments	xvii
Introduction	xix

Part I Consider This before You Commit to Project Server 2007

1 What Your CFO Needs to Know about Project Server	3
The Value of Enterprise Project Management	3
Organizational Commitment to EPM Success	5
The Executive Sponsor	5
The Project Team	5
The Subject Matter Expert(s)	6
Technical Services/IT	6
Active Project Sponsorship	6
2 The New Architecture of the Microsoft EPM Environment	7
Authentication	7
Analysis Services	9
Access	9
Cube Generation Updating	9
Cube Capabilities	10
Cube Management	10
Operating Systems	11
Network Operating System	11
Client Machines	11
Windows SharePoint Services	12
Ability to Scale	12
Networking Components	12
Communication between Project Pro and SQL	12
The Project Server Queue	13
Job Storage	15
Job Polling	15
Job Processing	15
Job Status and Management	15
The PSI Evolution of EPM Web Services	15
The PSI Forwarder	17
The Heart of the PSI	18
Immediate Benefits for the Developer	18
How Does the PSI Work?	19
PSI Method Properties	19
DataSets	19
PSI Limitations	20

Project Server Events	20
Pre-events	20
Post-events	20
Server-Side Scheduling	21
Server-Side Events	22
Where the Events Live	22
Data Storage	23
3 New Features and Some That Have Been Retired	25
The New Windows SharePoint Services-Based User Interface (UI)	25
A Single Interface	25
Project Web Access	34
Project Professional 2007	46
Multiple-Level Undo	46
Project Scheduling Improvements	47
A Single Publish Command	48
Gantt Bars	48
Miscellaneous Features	48
Support for Master/Sub Projects	49
Deeper Office Integration with Office 2007	49
Features No Longer Available	50
Save Link	50
Portfolio Modeler	50
To-Do Lists	51
Hiding of the Left Navigation Pane	51
A Word on Microsoft Office SharePoint Server (MOSS) 2007 and Project Server	51

Part II Plan for Your Project Server 2007 Implementation

4 Building Blocks for Implementation Success	55
Implementation Approach	55
Implementation Team	56
Envisioning	58
Planning and the Pilot	59
Full Implementation	59
Role of the PMO	59
Project Management Maturity	61
Not-So-Obvious Planning Considerations	62
5 Requirements, Prioritization, and Project Planning for Project Server	65
Gathering Requirements	66
Requirements versus Specifications	66
Building Functional Requirements	67
Requirements Prioritization	68
Prioritized Requirements versus Technical Reality and Cost	69
Use Cases	70
Creating an Iterative Plan	73

Part III Details on the Installation and Configuration of Project Server 2007

6	Installation of Project Server 2007 and Prerequisite Software	79
	Installation Overview	79
	Overall Considerations—Common across All Farm Sizes	80
	Server Installation in a Stand-Alone Environment	82
	Operating System	82
	Small-Farm, Single-Server Installation	88
	Installing IIS	89
	Installing the .NET Framework 3.0	90
	Database Server and DB Components	
	on Other Application Web Servers	91
	SQL Service Account	94
	Authentication Mode	95
	Report Server Configuration	95
	The Surface Area Configuration Tool for SQL 2005	97
	SQL 2005 SP1	100
	Service Accounts	100
	Installing the Binaries for Project Server 2007	101
	The SharePoint Products and	
	Technologies Configuration Wizard	104
	Configuring the Farm Services for a Single Server	106
	Creating the Web Application for PWA	109
	Creating the Web Application for the	
	Shared Services Provider	114
	Creating the SSP	117
	Creating the PWA Site	119
	Adding a Server to the Farm	123
	Client Components	125
	SQL Server 2005 Analysis Services Configuration	128
	Adding the SSP Service Account to	
	Analysis Services Administration	129
	Installing with MOSS 2007	129
	Installing Microsoft Office Project Server 2007	
	on an Existing Instance of SharePoint Server 2007	130
	Installing a New Instance of Project Server 2007	
	on an Existing Instance of SharePoint Server 2007	130
	Installation Procedure	130
7	SharePoint Central Administration	
	in a Project Server Environment	135
	Central Admin Home Page	136
	Operations	138
	Topology and Services	138
	Security Configuration	140
	Logging and Reporting	140
	Convert License Type	141
	Global Configuration	141
	Backup and Restore	143
	Data Configuration	145

Application Management	146
SharePoint Web Application Management and Configuration	146
Shared Services	151
8 Configuring Security in Your EPM Environment	153
IIS Security	154
Setup	154
User Accounts	154
SSL	155
Application Pools	156
NTLM and Kerberos Authentication	157
Project Server 2007 Permissions	158
PWA Security Fundamentals	158
Manage Users	159
PWA Permissions	163
Manage Groups	178
Manage Categories	180
Security Templates	182
Client Security	183
Project Professional 2007 Security	183
Internet Explorer	185
9 Configuring Enterprise Data Settings	191
Enterprise Custom Field Definition	193
Entities	193
Types	193
Field Categories	194
Field Types and What They Each Contain (More Detail)	195
Project Server Built-In "Custom" Fields	217
Custom Fields	218
Entities (Again)	222
Types (Again)	224
Building and Formatting Custom Enterprise Fields	224
Enterprise Global	240
Adding a Column Displayed in a View	240
Removing a Column from the View	240
Creating a New View (Single)	240
Removing the View from the Menu or View Bar without Deleting It	242
Enterprise Calendars	242
Resource Center	245
Resource Center Settings	245
Features of Resource Center	248
About Project Server	255
10 Configuring Time and Task Management	257
Financial Periods	258
Timesheet Periods	260
Timesheet Classifications	261

	Timesheet Settings and Defaults	261
	Administrative Time	263
	Task Settings and Display	264
	Close Tasks to Update	265
11	Configuring Look and Feel Settings	267
	Quick Launch	267
	Move an Item	269
	Adding a New Link to the Quick Launch Bar	270
	Deleting a Link	272
	Changing the Name of a Link	272
	Gantt Chart Formats	273
	Grouping Formats	278
	Managing Views	280
	View Types	280
	Views from Microsoft	288
	Some Guidelines on Views	296
	Creating and Modifying Views	296
	Deleting a View	298
	Copying a View	300
	Creating a New View	301
	A Few Last Words about Classic "Look and Feel"	301
12	Configure the Remaining Server Settings	303
	Database Administration Section of Server Settings	303
	Schedule Backup	303
	Administrative Backup	304
	Forced Check-in Enterprise Objects	305
	Delete Enterprise Objects	305
	Administrative Restore	305
	Cube Section of the Server Settings Page	307
	Cube Build Settings	308
	Cube Configuration	309
	Cube Build Status	310
	Database Server Modifications	311
	Enabling SQL Server 2000 Analysis Services for Use with Project Server 2007	311
	Enabling SQL Server 2005 Analysis Services for Use with Project Server 2007	312
	Forms Authentication	312
	Configuring Project Server with Excel Services	313
	Steps to Enable ECS for Use with Data Analysis Views	314
	Project Server 2007 Report Pack for SQL Server 2005 Reporting Services	315
13	Roll Out the Desktop	317
	Internet Explorer	317
	Trusted Sites Zone	317

Project Professional	320
Additional Client Components	321
ActiveX Controls	322
Office Web Components	322
Analysis Services 2005 (9.0) OLE DB Provider (If Using Analysis Services 2005)	323
Microsoft Office Client Applications	324

Part IV Project Server 2007 Maintenance

14 Performance of Your EPM System	331
Tools from the Past	331
Identifying Potential Performance Degradation Areas	332
Client	332
Front End Web Server	333
Application Server	334
Database Server	335
Network	335
Tools to Diagnose Your System Objectively	336
Best Practice Analyzer	336
Performance Monitor	337
Scaling Your Environment	339
15 Application/Database Migration from Previous Versions	341
Migration Approaches	341
Migration Areas	342
Items Not Addressed by the Migration Tool	342
Premigration Steps	342
The Starting Point—Project Server 2003 SP2a	343
No Pending Status Updates	343
No Duplicate Enterprise Resources	343
No Commas in Enterprise Resource Display Names	343
Ensure That No Projects Are Checked Out or Have Been Recently Edited Externally	343
Versions	344
Project Server Authenticated Accounts	344
Migration	345
The P12MIGRATIONTOOL.exe	348
Postmigration Tasks	350
16 Techniques and Solutions for New Project Requests	353
Initiation Processes	353
Role of the Steering Committee	354
Tools	354
The Proposals Feature in Project Server 2007	354
Project Portfolio Server 2007	356
Custom Solution	357

17	Integrating Project Server 2007 with External Systems	359
	Project Portfolio Server 2007	359
	Project Server 2007 Visual Studio Team System Connector	360
	Microsoft Project Client Add-Ins	360

Part V Project Server in Action

18	Time Tracking and Task Updates	365
	How Task-Time Entry Has Evolved	365
	The Divorce of Task Status and Timesheets	366
	Process Options	366
	Different Roles Associated with the Task Update	
	and Timesheet Processes	368
	Default Assignment Owner	368
	Timesheet Manager	368
	Status Manager	369
	Features and Pages Related to Time and Task Entry	370
19	Reporting and Views	375
	Types of Views	375
	Common PWA View Functions	375
	Data Analysis Views	376
	Resource Center Views	377
	Project Center Views	379
	Project Views	382
	My Work Views	383
	Visual Reports in Project Professional	383
20	Resource Management	385
	The Resource Breakdown Structure (RBS)	387
	RBS for Authorization	387
	RBS for Reporting	388
	Resource Allocation and Capacity	389
	Configuring the Resources	399
	Build Team from PWA	410
	Surrogate Timesheets	413
	Using Resource Information	414
	Resource Views	414
	Resource Center Top Level	414
	Assignment Views	417
	Availability Views	417
	Use of Generic Resources	422
	Matching Resources	423
	Resource Skills	423
	A Word on Local Resources	424

21	How the Project Manager Interacts with Project Server	425
	Project Manager Basic Lifecycle	425
	Connecting to Microsoft Office Project Server 2007	
	from the Project 2007 Client	426
	Using Enterprise Templates	426
	Building the Plan	428
	Managing the Plan	445
	Approval from within Project Professional	452
	Enterprise Global, Local Global, and What They	
	Mean to the Project Manager	454
	Looking for Resources	458
	Keeping the Project Current	462
	Using the Project Workspace to Manage the Project	462
	Master Projects	464
	Cross-Project Task Dependencies (outside of Master Projects)	465
	Status Reporting	469
	Status Report Requests	469
	PWA Views	473
	Project Center Views	473
	Project Views	474
	Data Analysis Views	474
	A Word on the Project Cache	474
22	How the Team Member Interacts with Project Server	477
	Team Member at Work	477
	E-Mail Notifications	478
	Project Web Access Home Page	478
	Team Member Assignment and Reporting Process	480
	PWA Views	497
	Project Center Views	497
	Project Views	497
	Issues and Risks	497
	Resource Center Views	497
	Status Reports	497
	Collaborating with the Project Team (Project Workspace)	498
23	How the Resource Manager Interacts with Project Server	501
	Building Project Teams	502
	Surrogate Timesheets	505
	Timesheet Management	506
	Approval of Administrative Time Requests	507
	Approval and Rejection of Timesheets	509
	Status Reporting	513
	Views and Reports	513
	Resource Center Views	513
	Data Analysis Views	519
	Resource Information	521

24	The Executive and Miscellaneous Roles	523
	Project Center Views	524
	Data Analysis Views	527
	Excel	531
	SQL Reporting Services Reports	535
	Hybrid Views in Windows SharePoint Services 3.0	535
	Miscellaneous Roles	537
25	Project Server 2007—Doing More for Collaboration and Communications	539
	Built-In Features	540
	Issues	540
	Risks	545
	Documents and Document Libraries	546
	Alerts	546
	Deliverables	547
	Tasks	548
	Announcements	549
	Discussion	550
	Links	551
	Personal Views	551
	Extending the Environment	553
	Modifying a Site	553
	Customizing the Project Workspace	582
	Using the New Template Process	585
	Saving the Template as a File	587
	Registering the New Template	588
	Changing the Default Workspace Template in Project Server	589
	Building Workflows	589
	Creating Subpages and Sites	594
	Working with MOSS 2007	596
	Business Intelligence Features	596
	Forms Services	603
	Enterprise Search	604
	Other SharePoint Ideas for the Project Server Environment	604

Part VI Program and Portfolio Management

26	Program Management	607
	Custom Program Field	607
	Program View	608
	Master Projects	608
	Cross-Project Dependencies	610
	Provision Subworkspaces	611
	Deliverables	613
	Reporting on Programs	614

27	Project Portfolio Management	617
	SharePoint Portfolio Site	619
	New Project Request Details	619
	Using Alerts to Notify	622
	Initial Evaluation and the Virtual Business Case	623
	Enterprise Custom Fields and the Value View	623
	Resourcing the Projects	625
	Value View and Dashboard	626
	Index	627