



Microsoft Project Server 2003: Usage and Administration

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Agenda

- Before Starting With MS Project Server
- Initial Server Configuration
- Enterprise Globals
- Creating Enterprise Projects
- Administrative Projects
- Portfolio Analyzer

Before Starting With MS Project Server



- Define core requirements
- Define project organization
- Define the resource organization
- Identify working times and calendars
- Define project tracking methods
- Define security requirements
- Define hardware requirements
- ...

Before Starting With MS Project Server



- For more information see:
- Gary Chefetz: "Implementing Enterprise Portfolio Management with Microsoft Project Server 2002" aPress



Initial Configuration

- Setting application options
 - Specifying the Project Server mode
 - Selecting features
 - Enter base URLs
 - Configure alerts and reminders
 - Setting options for OLAP and resource availability
 - Setting default methods for tracking progress
 - Specify user authentication and password length



Initial Server Configuration

- Specifying the Project Server mode
 - Determines the extend of enterprise functionality
 - Enable enterprise features
 - Enterprise Global and Enterprise Resource Pool
 - Backing up the Enterprise Global
 - Build team from enterprise resource pool
 - Resource substitution
 - Import project and resource to enterprise
 - Enable only non-enterprise features
 - Disables all the enterprise features above



Initial Server Configuration

- Allow master projects to be saved to Microsoft Project Server
- Allow master projects to be published to Microsoft Project Server
- Allow projects to use local base calendars
- Enforce single currency as specified in the enterprise global template
- Allow only enterprise projects to be published to this server
- Active Directory group to synchronize



Initial Server Configuration

- Selecting features
 - Create accounts from MS Project
 - Delete a project
 - Customize PWA
 - Create administrative projects
 - Delegate tasks
 - Accessing information located on WSS
 - ...



Initial Server Configuration

- Enter base URLs
 - Intranet and extranet
 - Used in alerts and reminders
- Configure alerts and reminders
 - Configures the notification engine
 - SMTP server
 - Schedule email reminder service



Initial Server Configuration

- Setting options for OLAP and resource availability
 - Resource availability update schedule
 - for up-to-date information in Resource Center's "View availability"
 - Analysis Server and OLAP cube name, cube update schedule
 - Used by the Portfolio Analyzer



Initial Server Configuration

- Setting default methods for tracking progress
 - Percent of work complete
 - Actual work done and work remaining
 - Hours of work done per day or per week
 - Lock down defaults?



Initial Server Configuration

- Specify user authentication and password length
 - Project Server authentication
 - To log on without a Windows account
 - Windows integrated authentication
 - Required for WSS and Analysis Services
 - Disables the built-in Project Server Administrator account
 - Mixed
 - A single authentication method must be specified for each user account



Initial Server Configuration

- HKEY_LOCAL_MACHINE\Software\Microsoft\Office\11.0\MS Project \WebClient Server\ProjectServer\Datasets\Applications\DWORD DisableAuthEdit (DWORD)
1 to disable the user authentication selection in PWA



Enterprise Globals

- Enterprise Resource Pool
- Enterprise Global Template



Enterprise Resource Pool

- Local resources
 - Exist only in MS Projects local project plan
- Enterprise Resources
 - Exist in the Enterprise Resource Pool
 - Schedule resources across projects
 - Identify conflicts between assignments in different projects,
 - view how a resource's time is allocated across projects
 - Created manually or imported from Active Directory, MS Project, Outlook, Excel,...



Enterprise Resource Pool

- Resources: people, equipment, materials
 - Work resources
 - Human
 - Specific individual
 - Generic
 - Skill-based placeholder
 - Resource substitution
 - Material resources
 - Consumables



Enterprise Resource Pool

- Demo: Enterprise Resource Pool



Enterprise Global Template

- Dictates standards and customizations throughout all projects within an organization
 - Is a collection of default settings
- Stored in the Project Server database
- Local changes to the settings defined by the Enterprise Global Template are discarded when the user saves the project back to the Project Server database



Enterprise Global Template

- Settings in the Enterprise Global Template always win over the local Global template GLOBAL.MPT
- Check-in/check-out requirement
- Applied when the Project Professional user connects to the Project Server



Enterprise Global Template

- Calendars
 - Determine the working times for all resources and tasks
- Views
- Filters
- Custom Fields and Outline Codes
 - Alphanumeric codes that categorize tasks and resources Custom text, formulas, graphical indicators,...
- ...



Enterprise Global Template

- Resource Breakdown Structure (RBS)
 - Special outline code
 - Outline code 30
 - Identifies the reporting structure
 - Defines resource manager's relationship to a resource
 - Helps to manage Project Server security
 - “Orgchart”
- Demo: RBS



Enterprise Global Template

- Demo: Enterprise Global and Organizer, Views , Options, Change working time
- More information:
Microsoft Office Project Server 2003 Application Configuration Guide
2. Working with the Enterprise Global Template



Creating Enterprise Projects

- A project is an Enterprise Project if
 - It is created with Project Professional connected to a Project Server with enterprise features enabled
 - From a blank template
 - From an existing project
 - From a local or enterprise template
 - From templates found on the web
 - It imported using the Import Project to Enterprise Wizard (Tools > Enterprise options)
- Demo



Creating Enterprise Projects

- Build Team
 - Tools > Build Team from Enterprise
- Demo



Creating Enterprise Projects

- Assign Resources
 - Resources > Assign people and equipment to tasks
- Demo (incl. PWA)



Administrative Projects

- To track non-project time and nonworking time
 - Training, application support, meetings,...
 - Vacation, sick leave,...
- In Project Professional connect to the Project Server and click [File], [New] and select the [Administrative Time] template
 - By default, only nonworking times are included
 - To track non-project time, enter new tasks



Administrative Projects

- Enter start and finish date
- Create a project team
 - [Tools], [Build team]
- Assign team members to tasks
 - [Assign resources]
- Save to Project Server
 - [File], [Save]
- Publish
 - [Collaborate], [Publish], [All information]



Administrative Projects

- The project is now available in each team members task list
- To report future nonworking times use “Notify your manager of time you will not be available for project work” in PWA, [Tasks], [Actions]
- To report past nonworking times enter “Actual work” in “View my tasks”
- Submit changes



Administrative Projects

- Demo



Administrative Projects

- Nonworking times do NOT transfer to the resource calendar and will NOT cause a reschedule of the work in other projects
 - Nonworking times must also be entered into the resource's calendar in the Enterprise Resource Pool
- Nonworking times can cause resource overallocation in against production projects



Administrative Projects

- Useful for
 - Tracking the costs on nonworking time
 - Tracking non-project time for future planning purposes



Portfolio Analyzer

- Project analysis
 - Compare actual costs against baseline costs
- Resource Analysis
 - Total resource hours
 - Resource overallocation



Portfolio Analyzer

- Specify and build the OLAP cube
 - PWA > Admin > Manage Enterprise Features
 - Check in Analysis Service Manager
- Define the View
 - PWA > Admin > Manage Views > Add View
 - Choose View Type: Portfolio Analyzer
 - Specify a name and the Analysis Server and Cube
 - Choose chart type
 - Customize chart
- Demo



Portfolio Modeler

- What-if analysis
- Create a model
 - PWA > Projects > Model projects with Portfolio Modeler > New
- Demo