

Microsoft Project

Server 2013

Project Manager's Guide

A manual by Advisicon®

Helping You Build a Project

Management Culture

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About Advisicon

Advisicon is a professional project and portfolio management consulting, training and custom application development company. Advisicon helps our clients leverage the best practices of project management methods and technologies to manage projects more effectively.

Advisicon is a Registered Education Provider (REP) of the Project Management Institute (PMI), giving clients the confidence that they have chosen an organization that is well qualified to provide the instruction they need as well as the convenience of receiving Professional Development Units (PDUs).

Advisicon is a Microsoft® Gold Certified Partner with Enterprise Project Management (EPM), Information Worker, and multiple other advanced certifications. Advisicon helps organizations use Microsoft Project, Microsoft Office Project Server and SharePoint Services to manage their projects more effectively through optimization, training in best practices, and process and template development. Advisicon's consultants deliver deep expertise to our clients to help them use MS Project more effectively to deliver sustained results.



Our People

Advisicon's team of professionals includes Project Management Institute certified Project Management Professionals (PMPs), Microsoft Certified Professionals with specializations in Enterprise Project Management, Networking and Infrastructure Solutions, and Microsoft MVPs.

Our Philosophy

Advisicon is about delivering: Optimization, Knowledge Transfer and Sustained Results.

Our Services

- Microsoft Project and Project Server Deployments, Consulting and Training
- SharePoint Deployment, Custom WebPart Development, and Training
- Microsoft Access & SharePoint Application Development, Consulting and Training (see back of book for contact information or check our website, www.Advisicon.com)
- Project Management Office Formation and Development
- Project and Portfolio Management Consulting and Training
- Project Management Maturity Assessments
- On-Site Project Management Support
- Custom Application and Database Development

Our Team

- Project Management Institute-certified PMPs
- Microsoft® Certified Professionals (specializations in Enterprise Project Management, Networking and Infrastructure Solutions)

Advisicon serves clients in every type of industry including business, government, non-profit. Our services span international companies in North, Central and South America as well as Europe and Asia Pacific.

Visit Advisicon's website to read case studies of how Advisicon has helped clients, or to learn more about our services and products, contact Advisicon at 1-866-36-ADVIS or visit us at www.Advisicon.com.

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Tim Runcie, the President of Advisicon, has over 25 years of experience in Information Systems and 15 years in Construction Management. Tim has been recognized by Microsoft as an MVP (Most Valuable Professional) for his outstanding excellence in Office and for his support to technical communities worldwide. He was first recognized as an Access MVP and has continued to gain recognition as a Project Portfolio Manager (PPM) in Enterprise Project, Program and Portfolio Management MVP for his expertise in MS Project, Project Server & SharePoint. This award has to be renewed annually and is extremely competitive. Tim has held this for over 10 years.

Tim has been assisting Project Management Offices and Organizations (PMOs) in leveraging technology like Office Applications, Project, Project Server & SharePoint to meet their business Intelligence and reporting needs. His experience covers all sectors of customer industries such as High Tech, Government, Non-Profit, Private Business, Manufacturing, Construction, Banking, Healthcare and the Information Services or Information Technology industries.

He has focused in consulting, mentoring and training organizations to successfully complete their projects using scarce resources, fixed budgets and interconnected schedules, while leveraging technologies to automate and create powerful visual reports. Tim combines industry best practices, a passion for knowledge transfer, and tools development to optimize Project and Project Portfolio Management processes and to successfully integrate Project Management best practices into organizations' culture.

Tim loves teaching. When not leading or mentoring organizations, he is teaching classes centered on the disciplines and technologies of Project Management. To every project he brings a personal passion for education and a commitment to providing Advisicon's customers with a full set of skills and tools to achieve optimum success.



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Cindy M. Lewis, MCTS, MCITP, MCT, PMP, PMI-SP, MVP



Cindy is a Senior Project Advisor at Advisicon, Inc. She brings nearly 20 years of experience in scheduling, training and managing large projects. As a professional project manager, Cindy has focused her career on Information Technology projects specializing in company-wide system implementations spanning industries such as architecture, financial, manufacturing, medical, education and high tech. Cindy has in-depth expertise in lifecycle management, organizational project/portfolio process development and management, and customized curriculum development and execution.



Cindy has been a sought-after consultant called on to help numerous companies both locally and across North America to deploy, assist and, if needed, rescue failed Project Server implementations in versions 2002, 2003, and 2007. In Project Server 2010 Cindy has captured complex business requirements and delivered a best in case solution recommending features that derive value for the business and provided consultative training to apply these features immediately. She has deployed Project Server 2010, deployed Proof-of-Concept instances and has directed Project Server 2007 to Project Server 2010 upgrades. Her vast experience includes working with both on-site and cloud based (hosted) solutions.

Her passion is training and leading large groups via both live and virtual classrooms. Courses are delivered several times a month onsite at customer training facilities.

Advisicon is pleased to announce that Cindy received the Most Valuable Professional (MVP) award in Project by Microsoft in 2012. With an estimate of less than 60 people receiving this designation for Project out of the thousands of MVPs awarded worldwide, this is a great testament to her dedication to the scheduling community. She is the second person at Advisicon to receive this award following Tim Runcie. If you haven't seen Cindy, watch for her at the next Microsoft or PMI conference or event. Some of her past duties at these events including giving short presentations, running hands-on labs, working Project kiosks and booths, demoing software, and working at Ask the Experts' events.

Comments & Feedback

We are interested in your feedback about this publication. It is our goal to continually improve our books and resources and to enhance your learning experience. Please email us at info@Advisicon.com, and let us know your thoughts.

We look forward to hearing from you. Happy learning!





How To Use This Book

Conventions Used in this Book

Legend of Icons

A number of icons are used in this book to highlight important information.



The Note Icon and call-out box indicates a key fact or insight to help participants better understand helpful background information, quirks, explanations for the way things work, answers to Frequently Asked Questions (FAQs), and helpful things to remember.



The Tip, Trick and Shortcut icon and call-out box presents quick ways to do things faster and impress colleagues.



The Warning Icon and call-out box will draw your attention to important risks, pitfalls, potential issues, and alternate concepts that may assist you with managing your project processes.

The Meaning of the Fonts

This book uses a few conventions to display meaning within the text.

Bold text indicates the title of a button, menu item, or file name, that should be clicked on or selected to complete a step. Bold text also indicates a key word or phrase worthy of consideration.

Text that is set in a monospace font indicates text that needs to be typed in (like a URL, or code).

Navigating this Book

This book has been organized so that each chapter can build upon the concepts and skills learned in the previous chapters. However, each chapter is designed to be relatively self contained. Keep an eye out for any cross-references to find more information on a subject.

Contents

Chapter 1	Introduction and Overview	1
	Introduction & Overview.....	2
	What Will You Learn from this Book?.....	2
	Who Should Read this Book?	3
	Changes in Project Server 2013 that Affect Administration.....	4
	How is this Book Structured?.....	6
	Project Server Best Implementation Practices	6
	Key Approach and Analysis Concepts.....	7
	Project Server Key Areas of Capability	7
	Key Requirements Mapping and Implementa- tion Best Practice Steps	8
	Implementation Best Practices Roadmap	11
Chapter 2	Understanding Project Server as a Project	
	Management Tool	13
	Overview.....	14
	Project Lifecycle Management	16
	Leveraging Technology for Project Management	17
	Overview of the Microsoft EPM Solution.....	21
	Microsoft Project Standard	21
	Microsoft Project Professional	21
	Microsoft Project Professional for Office 365 (Online)....	22
	Microsoft Project Online.....	22
	Microsoft Project Server.....	23
	Microsoft Project Portfolio Server.....	25
	SQL Server and Integration with Line of Busi- ness (LOB) systems	26
	SQL Reporting Services.....	26
	Different Project Lifecycle Approaches.....	27
	Using SharePoint, Project Pro and Project Server	29
	Managing with a Shared Resource Pool.....	30
	Tracking and Managing Planned vs. Actual	31

Chapter 3	Understanding Project Server Roles	33
Overview.....	34	
Role Based Interaction with Project Server.....	35	
The Administrator Role	36	
The Executive or Portfolio Manager Role	38	
The Project Manager Role	39	
The Resource Manager Role	40	
The Team Member Role.....	41	
Key Points to Remember	42	
Chapter 4	Program to Portfolio Management with Project Server..	43
Overview.....	44	
Projects, Programs and Portfolios.....	45	
Project Server 2013 in Portfolio Management	45	
Project PPM Supports.....	47	
Rolling Up Metrics for Project-to-Portfolio Management	49	
Supporting Fact-Based Decision-Making.....	50	
What If Scenarios.....	50	
Line of Business Integration and Reporting Capabilities	52	
Connecting Databases	52	
SQL Reporting Services	53	
Custom WebParts.....	53	
Summary.....	54	
Key Points to Remember	55	
Chapter 5	Scheduling.....	57
Creating a SharePoint Tasks List Project	58	
Setting up the Project Professional Connection to PWA	62	
Differences Between Scheduling in PWA and		
Project Professional	64	
Creating New Projects in PWA.....	65	
Checking Out and Checking In Projects in PWA.....	67	
Checking Out and Checking In Schedules in		
Project Professional	69	
Saving Versus Publishing Changes	71	
Building a Schedule in Project Pro	74	
Building a Schedule in PWA.....	75	
Manual Scheduling vs Auto-Scheduling	75	
Inserting and Deleting Tasks	77	
Organizing Tasks into Phases	78	

Linking Project Tasks	79
Chapter 6 Resource Management in Project Pro.....	81
Overview.....	82
Project Professional Resource Management	83
Local Resources vs. Enterprise Resources	83
Overview of Task Types	85
Building a Team of Resources.....	89
Using Generic Resources.....	92
Assigning Resources with the Resource Names Column	93
Assigning Resources with the Assign Resources Dialog Box	94
Checking Resource Availability	96
Publishing Assignments	100
Managing Overallocations.....	102
Key Points to Remember	107
Chapter 7 Resource Management in PWA	109
Overview.....	110
PWA Resource Management.....	111
Using SharePoint Tasks Lists	111
Using Resource Plans	114
Using the Schedule.....	118
Analyzing Resource Assignments with the Resource Center.....	123
Key Points to Remember	125
Chapter 8 Working with Views in PWA and Project Pro.....	127
Overview.....	128
Working with Views in PWA and Project Pro.....	129
Working with Display Options in PWA.....	129
Working with Views in PWA.....	132
Working with Groups and Filters	143
Sorting in a PWA View	147
Working with Quick Click Options in Project Pro.....	148
Working with Timescale Options in Project Pro.....	149
Working with Views in Project Pro.....	150
Grouping and Filtering in Project Pro	156
Sorting in a Project Pro View	159
Formatting Views in Project Pro	159

Key Points to Remember	161
Chapter 9 Working with Project Sites.....	163
Overview.....	164
Managing Documents.....	165
Creating Document Libraries.....	165
Uploading Documents.....	167
Editing Document Properties	168
Enabling Document Versioning and Check In / Check Out	169
Managing Risks and Issues	172
Creating a New Risk Item	172
Creating a New Issue Item.....	174
Linking Risks and Issues	176
Managing Deliverables.....	178
Creating Deliverables.....	178
Linking Deliverables to a Task	181
Updating Deliverables	183
Key Points to Remember	184
Chapter 10 Tracking and Approval Management.....	185
Overview.....	186
Tracking and Approval Management.....	187
Task Updates	187
Tracking and Reporting with Project Professional.....	192
Publishing a Schedule	199
Timesheets.....	201
Auto Approval Rules	202
Delegation	203
Key Points to Remember	208
Chapter 11 Finalizing a Schedule	209
Overview.....	210
Finalizing a Schedule	211
Resolving Resource Overallocations	211
Optimizing the Schedule to Meet Deadlines	218
Getting Final Schedule Approval.....	225
Setting a Baseline	226
What is a Baseline?	226
Effects and Benefits of Setting a Baseline	227

Setting a Baseline for the Entire Project.....	229
When to Set a New Baseline	232
Key Points to Remember	236
Chapter 12 Managing Project Manager Preferences.....	237
Overview.....	238
Optimizing Through Preferences	239
Managing the Cache	240
Overview of Caching.....	240
Clearing the Local Cache	241
Factors Affecting Performance	242
Managing the Queue.....	243
Overview of Queue Service	243
Managing Alerts and Reminders	245
Managing Personal Alerts and Reminders.....	246
Managing Alerts and Reminders for Resources	249
Key Points to Remember	253
Appendix A Advisicon Services and Training	255
About Advisicon	256
Consulting and Training Services.....	256
Training Programs	259
Advisicon Project Management Courses.....	259
Advisicon Microsoft Office Project Manage-	
ment Technology Courses.....	260
Advisicon Flowcharts.....	262
Advisicon Project Management Tools	266



Chapter 1

Introduction and Overview

Introduction & Overview

The *Microsoft Project Server 2013: Project Manager's Guide* is designed to help your organization's project managers (and key resources managing projects), understand the tasks involved with building, managing, tracking and reporting in Microsoft Project Server and Project Professional 2013.

What Will You Learn from this Book?

There are several important tasks that a project manager, project lead, or a scheduler must manage in Microsoft Project Server 2013 for Project Web App users to be able to access and interact effectively with project data.

Some of these important tasks include:

- Understanding Project Server's role and organizational value for project, program and portfolio management.
- Establishing and managing enterprise views, templates and structure for Project Server.
- Building and managing schedules.
- Assigning and managing resources.
- Managing queue settings for your specific environment.
- Managing time and task tracking.
- Customizing Project Web App to fit the specific needs of your organization.

Who Should Read this Book?

This book is designed to produce maximum benefits for a number of professionals.

Project Managers and Project Leads

To those individuals who will build, manage and maintain the project schedule, this book is primarily designed for your use.

Project Management Office

Those individuals who help to define and maintain project management standards and practices throughout the organization.

Project Server Administrators and Application Administrators

Those individuals who will have administrative privileges for Project Server and will perform the duties required to configure and maintain Project Server.

Project Site Administrators

Those individuals who will have administrative privileges for Project Server and will perform the duties required to configure Project Server to meet organizational portfolio and project management needs.

Any Member of Your Organization's Project Server Deployment Planning Team

Those individuals within your organization who will plan the deployment of Project Server 2013 and who may need a better understanding of the day-to-day Project Server administrative tasks that are available in Project Web App.

Changes in Project Server 2013 that Affect Administration

Most project managers will not be doing administrative work. However we have identified that enough will want to manage the presentation of the information in a manner similar to what a Project Administrator would do. Therefore, we have included some of the key areas that are different from 2010 to 2013 Project Server.

Some Server Settings Moved to SharePoint Central Administration

A few Project Web App Server Settings that were previously located in Project Web App for Project Server 2010 have been moved to SharePoint Central Administration for Project Server 2013. The administration of these settings were more typically done by a farm administrator, instead of a PMO manager or Project Server administrator.

SharePoint Permissions Mode

By default, Project Server 2013 security will be in SharePoint Permissions Mode.

SharePoint Permissions Mode uses “Project Server 2013” SharePoint Security groups as containers in which Project Server 2013 users can be added as members. Project Server 2013 permissions are assigned to these groups. If you require more control, you can change to the traditional Project Server Permissions Mode. It is important to understand security modes when you are viewing Chapter 3, *Understanding Project Server Roles*.

Project Online

Project Online is a hosted version of Project Server 2013 in which the service is hosted in the Microsoft cloud. Administration will differ between Project Online and Project Server 2013, since many administrative tasks are done for you and are not modifiable by users. The tasks documented in this guide are intended for Project Server 2013 users, and not for Project Online users.

However, many non-administrative tasks in Project Online are very similar to the corresponding tasks in Project Server. The non-administrative tasks in this book should be useful to both Project Online users and Project Server users.

A *Project Online Administrators Guide* will be available to you at a later date.

How is this Book Structured?

Project Server 2013 is now organized into administrative sections differently than in previous versions. Project Server administrative settings are now located in Project Web App and in SharePoint Central Administration.

For Project Managers, you will use both PWA and Project Professional, all in conjunction with SharePoint.

The book is organized to first introduce you to project management methodology and conceptual structure, and then present you with tactical, direct features and functionality of both Project Professional and Project Server.

Project Server Best Implementation Practices

If your goal is to leverage a Project Server implementation, below are some of the key approaches and activities we have seen at Advisicon that not only support best practices, but help to ensure cultural adoption and integration into the daily/weekly fabric of project management worldwide.

Key Approach and Analysis Concepts

You should address the following key concepts in order to leverage and maximize Project Server for best results.

Not everything has to be built out, but if you follow this process to inform your approach, you can get to ROI faster. Following this process will allow you to scale Project Server up through the enterprise with little rework, fewer changes to the project lifecycle workflow, and less end user impact.

Remember Project Server is built on a relational database (so what you build, you will need to care, feed and maintain), but simple additions of key columns will give you sorting, filtering and reporting very easily.

Project Server Key Areas of Capability

Project Server has the following key capabilities that you will need to enable, discuss, or toggle when planning an implementation. Many of these capabilities build or rollup into views and reports:

- Demand management planning and forecasting
 - Past, present and future work
 - Project, program, portfolio
- Interconnection with other Line of Business systems
 - Outlook
 - Team Foundation Server
 - OneNote
 - SharePoint
 - ERP Systems
- Resource capacity planning and forecasting
 - By skillset or role
 - By department

- By resource
- Cost and work forecasting
 - By resources
 - By projects
 - By portfolios
- Existing work portfolio management
 - Dashboards of earned value reporting
 - Telling the story (dashboards, issues, risks, notes) around what is going on
 - High level to low level drill down reporting (views)
- New work portfolio management (intake selection and prioritization process)
 - How projects rank against strategic business drivers (at the organization or department level)
 - Rating and ranking of project, costs, resources by customized or existing business drivers
 - Review of existing project capability by financial budget or by resource availability

Key Requirements Mapping and Implementation Best Practice Steps

When starting a Project Server implementation, these are the key topics that discussion should focus on. Many of these build and are completely integrated, so that you can stay at a high level or drill into more granular approaches depending on the business or stakeholder needs.

We typically engage key stakeholders in a requirements mapping session at Advisicon to detail out the fastest steps and key topics that will be needed to establish quick Return on Investment (ROI) for stakeholders.

Those stakeholders could be:

- Senior or executive management
- Project managers

- Resource or functional managers
- Business decisions makers (like portfolio managers)
- Team members (those who are doing the work)
- Infrastructure and environmental support and administrators
- External groups (outside of the organization)

Key focus areas to address for a best practices implementation of Project Server:

1. Identify how many different departments or unique groups will need the solution:
 - a. What groups may want in their own views, fields, reports, dashboards and SharePoint Workspaces.
 - b. How many of these groups will have overlapping needs.
2. Identify what roles – stakeholders and stakeholder classes (Functional Groups) – there are:
 - a. Within groups there are typically roles (power users, administrators, end users, the PM's resource or functional managers, executives).
 - b. Identifying roles will help you setup security, permissions, templates, etc. for faster care, feeding and management of Project Server.
3. How much integration do we need Project Server to have with other external systems?
 - a. ERP
 - b. Other databases
 - c. Business Intelligence reporting
 - d. Data warehousing
 - e. SharePoint
4. Demand management planning and forecasting:
 - a. Does our organization need to have detailed tasks for managing the daily/weekly work?
 - b. Are there Project Template Types (what kind of work is standard) that can be leveraged and automated?
 - c. Does the organization have an in-take process for mapping and planning incoming work?
5. Resource capacity and capability planning:
 - a. Identify the skillsets, and roles that apply to end users.
 - b. Review calendars and availability planning with max units.
 - c. Review overtime and work overallocation reporting.

- d. Establish all custom fields for sorting, filtering, and grouping
 - i. i.e. Department, RBS, Primary Role, etc.
- 6. Cost planning and forecasting:
 - a. Establish base rate table for resources and leverage other cost rate tables as needed.
 - b. Establish fiscal year planning for reporting.
 - c. Create base cost for generic roles or burdened rate for planning.
 - d. Address materials or cost planning resources (travel, equipment, etc.).
 - e. Review task costs fields for fixed costs.
- 7. Business Intelligence reporting and dashboards:
 - a. Review what internal dashboards and views are covered and what customized views are needed.
 - b. Is there any integrated reporting needed for pulling in data from other systems?
- 8. New work portfolio management (selecting the right projects):
 - a. Define the key business intake or selection process that is being used now (Excel, SharePoint, other systems or tools).
 - b. Identify different business drivers to rank and age.
 - c. Rate, rank and establish measurement ranking criteria for business drivers.
 - d. Establish budgetary estimates for new proposed projects.
 - e. Create resource plans for high level estimates (so you don't have to build lots of information when you are still in a selection process).
 - f. Discover if any new projects are dependent upon each other/
- 9. Automation, workflows and notifications:
 - a. Are there existing workflow operations that can be mapped and automated?
 - b. Is there an approval routing process for any project related notifications, project stage gates, etc.?

Implementation Best Practices Roadmap

In performing a mapping or creating a roadmap of what needs to be installed and configured, we recommend performing a requirements mapping series of sessions or workshops to help create a final roadmap for a successfully managed, staged and scalable Project Portfolio Management implementation.

Here are some of the steps that will yield excellent results in ensuring to address diverse stakeholders and key groups who will use, leverage and work with Project Server.

1. Requirements workshop and roadmap session
 - a. Identify the online or on premise needs
 - b. Map out stakeholder needs
 - c. Identify reporting requirements
 - d. Create phased implementations to manage scope and deliver ROI the fastest
2. Environment setup or configuration
3. Create a pilot or proof of concept for pilot group of stakeholders
4. Configure and implement pilot findings to full production
5. Build templates, views, workflows and dashboard views
6. Train stakeholder groups in Project, SharePoint
 - a. Administrators
 - b. Project Managers
 - c. Team Members
 - d. Executives
7. Migrate or publish project schedules
8. Fine tune environment, views and projects
9. Project complete (phase 1)
10. Move to portfolio management and BI reporting or other system integrations (separate, but managed phases)



Chapter 2

Understanding Project Server as a Project Management Tool

Overview

The practice of project management is part art, part science, and a lot of discipline. Project management requires listening, asking good questions, planning, prioritizing, communicating, motivating, analyzing, tracking, re-prioritizing, and a big dose of other work that most people do not make time to do. Good project managers make the time, and use tools to help them do their work more efficiently. Microsoft Project and Project Server are designed to help project managers do their job more efficiently.

Microsoft Project Server is a system of integrated project and portfolio management tools. Project Server is more than just an enterprise project scheduling tool. It is also a communication and collaboration portal for project teams. It is also a central repository for all project data, documents, and discussions.

Project Server is a very robust system. Users often struggle with Project and Project Server if they lack a good overall understanding of this system. There are certain features, work flows, and functions in Project Server that only make sense in the context of what they were designed to do, which is support project management across an entire organization.

In *Understanding Project Server as a Project Management Tool* we provide you with an overview of the features of Project Server that are designed specifically with the project manager and the project team in mind. Once users understand the purpose for which features of Project Server were designed, then they make more sense.

We will look at the following:

- Leveraging Technology for Project Management
- Different Project Lifecycle Approaches
- SharePoint, Project Client and Project Server
- Resource Management
- Managing with a Shared Resource Pool
- Forecasting Workload and Resource Availability
- Tracking and Managing Planned vs. Actual

Upon completion of this chapter, the participant will be able to:

- Create, publish and manage project schedules with Project and Project Server
- Work with an Enterprise Global Resource Pool
- Manage project teams using Project Web Access and Project WorkSpaces
- Use SharePoint Services and Project Server to coordinate communications around projects

Project Lifecycle Management

Figure 2-1 is a flowchart that illustrates the big-picture flow of the project management lifecycle.

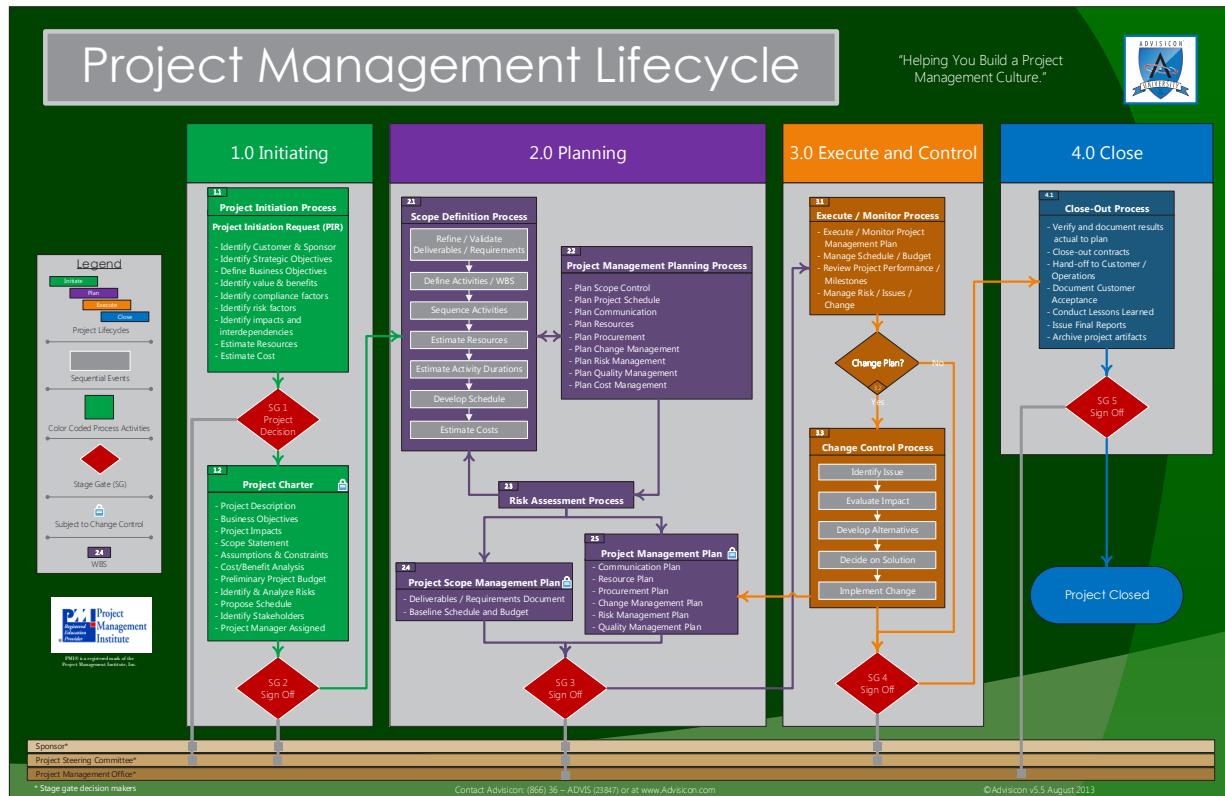


Figure 2-1 Project Management Lifecycle Flowchart

Leveraging Technology for Project Management

Why use Microsoft Project Server 2013?

Projects are becoming a strategic focus for many organizations, who are projectizing many different activities and initiatives:

- New product and service development projects
- Process improvement projects
- Policy and organizational development projects
- Technology development and implementation projects
- Focused activities to deliver specific outcomes for clients

Organizations are pursuing a greater number and wider variety of projects every day. For some organizations, projects are a small, but important, part of their business. Many organizations are projectizing their strategic work—so they can more effectively focus on key initiatives.

For others, projects ARE their business. From architects, builders, engineers and construction companies to marketing teams, IT organizations, and software developers—projects define their work.

The demand for effective, consistent project management has grown rapidly over the last decade. Project management has rapidly become a core area of management knowledge and practice. The role of “Project Manager” has become very common in organizations.

The field of project management focuses on answering the question: What are the processes that lead to successful projects. Project management is essentially process-focused: How to do projects right.

Figure 2-2 shows the processes involved in the project lifecycle and how they connect.

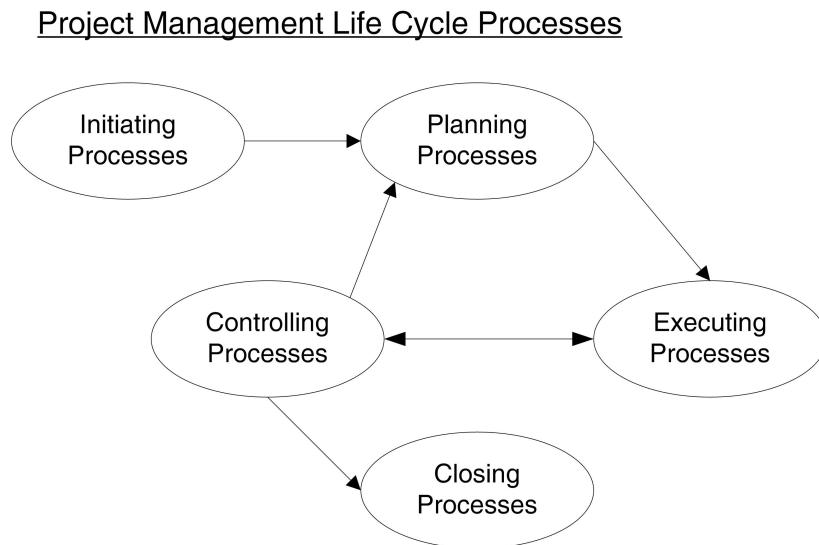


Figure 2-2 Project Management Lifecycle Processes

Complex management processes require tools to manage them. People tend to use what they have available and already understand. This is why Microsoft Excel is often used in smaller project management initiatives. For many projects, Excel is a sufficient and powerful tool.

However, it does not take much complexity (multiple interrelated schedules, resources, requirements, deliverables, and departments) to exceed Excel's project management capabilities. Advanced software applications have been developed to support and facilitate many levels and styles of project management. These applications range from simple, high-level schedules to complex, integrated enterprise solutions.

Project management processes can become very complex. One of the risks of complex processes is that they tend to be ignored in practice, resulting in inconsistent results, idiosyncratic management, and frustration.

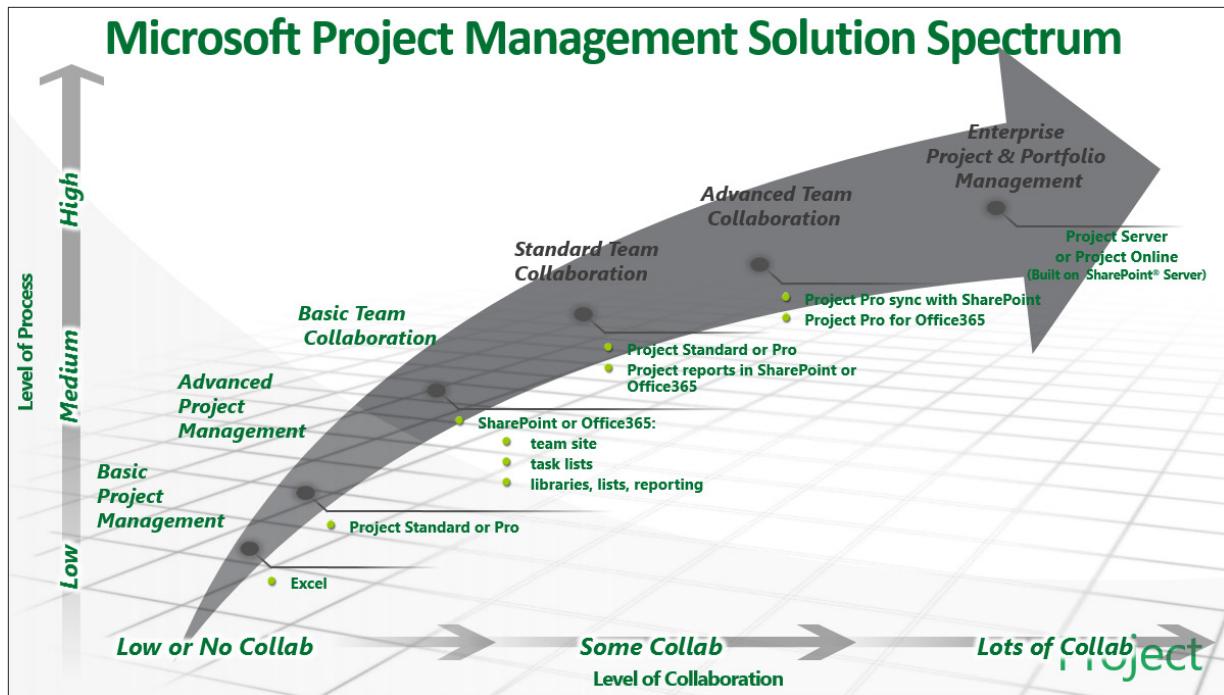


Figure 2-3 Microsoft Project Management Solution Spectrum

The diagram above illustrates the migration from low or no collaboration (the X axis) with the Level of Process needed (Y axis). As the project to portfolio level of maturity increases and the need for more collaboration (beyond one or two people to many) grows, so does the technical solution.

Strategic project management methods and consistent project management processes need tools designed specifically to support them to be truly efficient and effective. The leading application on the market that has been designed specifically to support project management is Microsoft Project. This desktop application is part of Microsoft's popular Office Suite.

Microsoft Project is a powerful relational database program that can be configured for use on a single client PC or in networked environments. But its capabilities to facilitate and automate enterprise-wide project management processes are limited. For organizations that are seeking an integrated, enterprise-wide project and portfolio management solution, Microsoft has developed Microsoft Project Professional and Microsoft Project Server.

What is Project Server 2013?

Microsoft Project Server 2013 is the fifth generation of Microsoft's server-based enterprise project management technology which integrates with Microsoft Project Professional.

Project Server is designed to support a process-driven project management organization. Project Server can be configured to automate many project management processes, especially schedule tracking and communication. Project is the primary scheduling engine in which project managers create project schedules, deliverables, task assignments, and task notes that are viewed and shared by project team members through Project Web Access (PWA). Project's dynamic scheduling engine allows users to model "what-if" scenarios, and immediately see what different changes will impact in their projects. Project Server allows users to see these impacts across an entire enterprise.

Project Server 2013 allows task assignments that are created in Microsoft Project 2007 and 2013 to be communicated automatically via Microsoft Office Outlook 2007 or 2013, and visual reports to be generated in Excel and Visio, thus leveraging the entire suite of Microsoft's Office 2007 and 2013 Suite of applications. By leveraging the power of the SharePoint environment and a close integration with other Microsoft Office applications, Project Server enables project and management teams to communicate and collaborate on projects, forecast and run what-if scenarios, and analyze plans (baselines) versus actual historical data across their enterprise.

Some primary values of Project Server to an organization are:

- Visibility of all resource assignments and allocations across an entire enterprise.
- Central SQL database repository of all projects in an organization's portfolio of projects with advanced reporting and analysis features.
- Automated communications of project assignments and updates.
- Roles and rules-based access to project information.
- SharePoint-based collaboration portal for project activities.
- Integrated with Microsoft's Office 2013 applications (especially Outlook, Excel and Visio). Analysis Services using OLAP cubes, and many more options leveraging SQL Reporting Services.

Overview of the Microsoft EPM Solution

Understanding Project Server as a project management tool helps many users discover Project Server's value to their organization and why they are being asked to use it. This section provides an overview of where Project Server fits into the Microsoft Enterprise Project Management (EPM) solution.

Microsoft Project Standard

Microsoft Project Standard is a stand-alone project management desktop application. Project Standard can be used on a network with a shared resource pool, which allows for easy access to a shared Resource Pool, but this set-up is very prone to corruption of the Resource Pool. Project Standard does not connect to Project Server.

Microsoft Project Professional

Microsoft Project Professional is the desktop project management application that connects to Project Server. Most of the data that can be accessed via Project Server originates in Project Professional. Project data has to be 'published' to Project Server to be accessible via Office Project Web Access.

Microsoft Project Professional for Office 365 (Online)

Microsoft Project Professional for Office 365 is the same version of Microsoft Project Professional, but it is accessed via the cloud and is a subscription Software as a Service (SaaS) or streaming product.

Project Pro for Office 365 is delivered as a subscription through Office 365, Project Professional for Office 365 is the Microsoft Cloud delivered version of Project Professional. With Project Pro for Office 365, software automatically stays up to date (with options for customizable policies). You can access Project Pro for Office 365 from virtually anywhere on any Windows PC by streaming the complete desktop client with Project on Demand.

Project Pro for Office 365 is the advanced project management and resource management application that connects to Project Server. Most of the data that can be accessed via Project Server originates in Project Professional. Project data has to be ‘published’ to Project Server to be accessible via Office Project Web Access.

Microsoft Project Online

Microsoft Project Online 2013 is an enterprise project management system that is fully cloud based. Whether that is public or privately hosted, you are able to leverage the enterprise version of Project Server Online through SaaS.

Project Online with Project Pro is an all-in-one subscription that delivers the full spectrum of project management capabilities — from task management for teams to project management to project portfolio planning. With the ability to access Project from virtually anywhere through Office

365 cloud services, team members can manage their tasks as easily as pressing a check box on their smartphone browser and managers can check reports on the go with just a swipe on their wirelessly connected tablet device.

Project Online is an integration of a SQL database with two clients: Project Professional 2013 (Client or Streaming) and Project Web Access 2013. Microsoft Project Web Access 2013 (PWA) is the browser-based user interface that allows users to access the central repository, Microsoft Project Online. PWA is the interface for the SharePoint collaboration portal where data from published Microsoft Project Professional 2013 schedules are stored.

Microsoft Project Server

Microsoft Project Server 2013 is an enterprise project management system. It is an integration of a SQL database with two clients: Project Professional 2013 and Project Web Access 2013. Microsoft Project Web Access 2013 (PWA) is the browser-based user interface that allows users to access the central repository, Microsoft Project Server 2013. PWA is the interface for the SharePoint collaboration portal where data from published Microsoft Project Professional 2013 schedules are stored.

Figure 2-3 illustrates Project Server communication workflow.

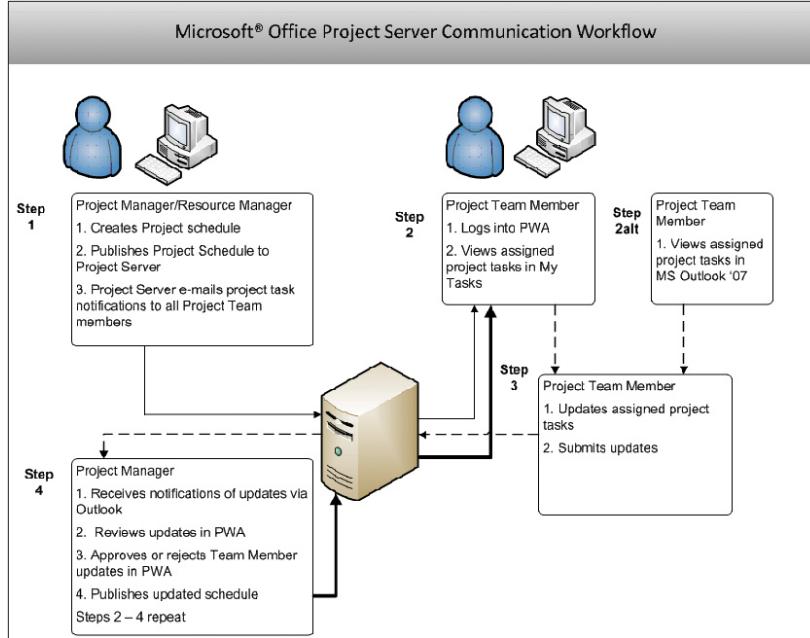


Figure 2-4 Project Server Task Assignment and Update Work Flow

Microsoft Project Server 2013 is positioned to provide tactical EPM views and project management capabilities. Project Server can also be integrated with Microsoft Project Portfolio Server, Windows SharePoint Services 3.0, Microsoft SharePoint Server (MOSS), and Microsoft InfoPath.

SharePoint Front End

Project Server 2013 provides a rich set of browser-based functionality through its component Office Project Web Access, a Microsoft ASP.NET application that uses Project Server Web services through Microsoft Internet Explorer and Project Server Web Parts in Windows SharePoint Services 3.0.

Project Web Access is built on Windows SharePoint Services 3.0 and offers all of the advantages of WSS 3.0, such as a rich browser experience by using AJAX development techniques and the Web Part and Integration

framework. The web-based client software, Microsoft Project Server 2013, is accessible through Project Professional 2013 and other Win32 API-based clients such as the Microsoft Visual Studio development system.

Project Server Gateway Middle Tier

Project Server 2013 provides a real application server that includes the Project Server Interface (PSI), discrete business objects, server-side events, a common data access layer (DAL), and queuing services. The PSI provides web services that can be consumed by other applications. Project Server 2013 and Project Portfolio Server are connected through the middle-tier components. This out-of-the-box connection is known as the Project Server Gateway, a bidirectional link that enables administrators to associate multiple Project Servers to Project Portfolio Server, providing executives with a consolidated view of all projects within the organization.

SQL Server Back End

Both Project Server 2013 and Project Portfolio Server use SQL Server 2000 SP4 or SQL Server 2005 SP1. Project Server 2013 takes advantage of some of the new features in SQL Server 2005, such as security enhancements and improved Analysis Services and Reporting Services.

Microsoft Project Portfolio Server

Microsoft Project Portfolio Server (comes with Project Online or Project Server), helps organizations identify, select, manage, and deliver portfolios of projects. The goal of this EPM solution is to align an organization's proj-

ects with its strategic priorities. Project Portfolio Server is a key component of the Microsoft Enterprise Project Management (EPM) Solution.

SQL Server and Integration with Line of Business (LOB) systems

Microsoft has extended Project Server's value by building it on Microsoft SQL Server business intelligence technology. This also allows Project Server 2013 to share databases with many other applications. This improves collaboration, reporting, and analysis. Easier integration and extensibility of information has also been enabled by the technology upgrade to Microsoft Visual Studio 2005. SQL Server Integration Services, SQL Analysis Services, SQL Reporting Services, and SQL Server Business Intelligence Development Studio can all be used to streamline productivity.

SQL Reporting Services

By being built on a SQL database, Project Server leverages SQL Server Reporting Services. This comprehensive, server-based solution enables the creation, management, and delivery of both traditional, paper-oriented reports and interactive, web-based reports. SQL Reporting Services is an integral part of the Microsoft Business Intelligence framework. SQL Reporting Services combines the data management capabilities of SQL Server and Microsoft Windows Server with familiar and powerful Microsoft Office System applications to deliver real-time information to support daily operations and drive decisions.

Different Project Lifecycle Approaches

The project management discipline has developed into a core area of organizational management. Different industries have developed project management methodologies that address their specific workflows and issues. Architects, construction companies and property developers have developed a set of project lifecycles that reflect certain standard processes from land planning and acquisition, to permitting and design requirements.

The rapid growth of the project management field has spawned a number of professional associations. The Project Management Institute (PMI) is the largest project management professional association in the world today and it is growing rapidly. The most widely used standard for project management has been developed by the PMI.

PMI's A Guide to the Project Management Body of Knowledge

PMI has developed a very extensive library of project management standards, references and tools. PMI has collected the most comprehensive reference on project management standards in a book called *A Guide to the Project Management Body of Knowledge (PMBOK® Guide)*—affectionately called “The PMBOK” (pronounced “PIM-bok”).

The PMBOK® defines a certain standard for project management practices, which many industries follow. Project Server 2013 has been developed to support a range of PMBOK-aligned project management approaches. It can be configured to support both Scrum and Agile approaches, but organizations employing these methodologies need to adjust their use and expectations of Project Server as a scheduling and management vehicle.

Technical Lifecycles (Agile to Scrum)

There are other approaches to project management that have been developed by and for project managers in different fields and industries. Two approaches used fairly widely in the technology sector are called Scrum and Agile.

The software development and technology industries have developed approaches to project management that reflect the need for short design-build iterations to facilitate integrating emerging requirements into new product development processes. These tend to focus on shorter iterations and progressive requirements definition.

It might be said that where the PMBOK methodology focuses on thorough planning before project execution, Scrum and Agile focus on minimizing the time between project initiation and execution, and repeated cycles of design, build, test, redesign, rebuild, and test.

Industry-specific Lifecycles

Some industries and fields that have developed their own project management methodologies and lifecycles include construction, architecture, IT, software development, and property development. Project and Project Server are configured so that they can utilize and support many different project management processes, especially those applicable to projects with longer project timelines.

Using SharePoint, Project Pro and Project Server

How do the different elements of the Enterprise Project & Portfolio Management (PPM) system work together?

A project manager first creates a project schedule in Microsoft Project Professional on an individual PC (client level). The project manager saves and publishes the schedule to Project Server. The project schedule now resides on Project Server. Upon publishing, Project Server automatically sends e-mail notifications to those who have been assigned tasks on the project schedule (a common configuration).

After a project schedule has been published, project managers and team members assigned to tasks in that project can log on to their Project Server account through Internet Explorer (version 7.0 and newer) and view their tasks, projects, and other information through Project Web Access (PWA) – the web-based graphic user interface for Project Server. Project Server 2013 and PWA have been designed to work entirely in a SharePoint environment, which provides a very rich and flexible environment for project team member collaboration from anywhere in the world via Internet Explorer.

Project Managers are then able to view the entire portfolio of published projects and manage their projects, resources, task updates, time sheets, status reports, and other activities through PWA. PWA also provides a quick and easy way to see multiple views of their projects from different screens. Project views are a strategic way to identify the current status of projects. Resource views are helpful for assessing resource availability and overallocations.

PWA offers project managers many stock views, and the flexibility to create many custom views, all of which can easily be exported to Excel for deeper analysis. The reporting functions of PWA are very robust and provide a wide range of options.

Project Server can be configured to automatically create new Project Workspaces for each new project that is published. Project Workspaces

are special SharePoint sites designed specifically for projects published in Project Server. A Project Workspace serves as the central collaboration site for everyone with an interest in a project.

Project managers and team members can leverage Project Workspaces for sharing project documents, managing risks and issues, and participating in shared discussions in one central location where all project participants can find everything relating to their project, including a view of the project schedule and many other Web Part options.

Documents stored and shared in a Project Workspace for shared access increase the level of data consistency impossible with files saved on individual drives or in folders on a network. Shared Documents are accessible based on permission and security settings. They have to be checked out for editing, which helps provide version control, maintaining the integrity of project documents. Project Workspaces also provide a site for creating, sharing, communicating and managing risks and issues.

One of the most powerful features of Project Server is the enterprise resource pool. Project Server uses a shared enterprise resource pool, which can be synchronized with Active Directory. The enterprise resource pool allows project and resource managers to see the availability and allocations (and overallocations) of all the resources in the organization in a single view.

Managing with a Shared Resource Pool

Using the enterprise resource pool, project managers can build a project team for each project to whom they can assign tasks in a project schedule. Using the enterprise resource pool, Project Server automatically reflects the working and non-working time of each resource, giving a project manager an accurate view of the impact to the schedule of each resource assignment.

Tracking and Managing Planned vs. Actual

Project and Project Server give project managers and teams the ability to create project schedules and save baselines that reflect their original plans. After saving and publishing their schedules, project managers are able to use the EPM system to track and update the actual progress of the project against their plan (baseline).

These features give project managers and organizations the ability to compare and analyze project performance. This data can help guide lessons-learned sessions, process improvement projects, team reviews, and even performance bonuses.



Chapter 3

Understanding Project Server Roles

Overview

In *Understanding Project Server Roles*, we address the roles of each of the different groups who use the Project Server system. Project server has multiple layers of accessibility, reporting and functionality, but no single group needs to utilize the entire system. Therefore, each position has a specific job function or series of activities for which they will use Project Professional and Project Server.

These roles are defined differently by each organization, but there are standard default types that can be chosen and utilized. Project Server has predefined the securities around these roles so that the administrators can quickly assign a security grouping or template to them and within a few minutes the user can be accessing the system.

These roles typically are defined as:

- Executive or Project Portfolio Managers
- Project Manager or Team Leads
- Resource Manager
- Administrator

Depending on the needs within your organization, you can refine or create new groupings for use and functionality with Project Server.

We will look at the following:

- Organizational team member roles and project manager roles.
- Executive and portfolio manager roles.
- Administrator and resource manager roles.

Upon completion of this chapter, the participant will be able to:

- Understand the roles played by each of the members using Project Server as well as critical responsibilities for each of those members.
- Assist with helping make decisions about what types of securities, permissions and access are needed by understanding the roles that an individual will play within the project management process.

Role Based Interaction with Project Server

Whether you are working in PPM Online or PPM on premise, you will be leveraging the configuration of the application itself. One of the best approaches to making this successful is to understand that those who access PPM will do so through a role.

Project PPM allows you to manage what people see and what they can do and the easiest method for this is to use roles to define the security model of Project Server.

This key approach is what makes Project Server a successful application; it uses a person-by-person, role-by-role, or group-by-group security model.

These security models allow for group permissions to be created and assigned to multiple users who fit that category. For example, all project managers can have the same types of default access to the system including permissions, views, and projects. Because each user is individually defined, they can then be selectively given different or additional rights.

This establishes a role based interaction with Project server. We will cover the most common types of groupings and roles that are performed in Project Server.

The Administrator Role

The role of the **project administrator** is to ensure that the viability of Project Server's functions, capabilities, and views are maintained. The administrator role is almost as a super user of the system, being able to troubleshoot functions and functionality and provide solutions or build custom views, reports and objects for the organization, managers, and executives.

Since Project Server administration supports all Project Server users, it is a critical role, just as a mechanic is critical to maintaining and servicing a company's fleet of service vehicles. When pieces of the EPM system are not working correctly, it is the administrator's job to fix them.

Advisicon's targeted training course: *Microsoft Project Server: Administrator* is designed to help new Project Server administrators understand the components of Microsoft's EPM solution, how to install and configure it, how to support and maintain it, and how to troubleshoot and customize it for users.

The administrator typically is the governor and guardian of the resource pool, securities, and system permissions. The administrator is also thought of as the go-to person when there is a question about system use. It is very important to limit system access so that it stays consistent for everyone.

While setup, installation, and configuration can be accomplished in a relatively short time by following proper procedures, the governance and administration of the Project Server system is an ongoing duty. The administrator watches, repairs, fine-tunes, and delivers clear visibility to the teams using Project Server.

There are a few key activities that the administrator must handle:

- Adding, removing and correcting resource pool inaccuracies.
- Establishing simple security and permissions settings.
- Creating custom fields that will deliver calculated or graphical alerts for management or team leads.
- Managing views and the web client interface.

- Managing the global template.
- Ensuring proper connectivity and accessibility for project team members and management.

The Executive or Portfolio Manager Role

Executives and portfolio managers act as executive stakeholders who employ a high-level viewing of projects. They monitor the progress or impact of changes throughout the project lifecycle. Often these roles are associated with a Project Management Office or are in senior management within the organization.

Some tasks that executives and portfolio managers perform are:

- Analyze and report on the current status of risks, issues, resources, projects, programs, and portfolios.
- Use custom Data Analysis views and reports to communicate with management and project teams.
- Analyze project performance over time (by project, program, department, manager, team, resource, and so on).

The Project Manager Role

The **project manager** has sole responsibility and authority for project and contract direction and control. Support managers (aka, task managers) who report within the various line organizations and departments have the responsibility for defining work and effectively managing the project resources. The project manager is responsible for each contract's end item. This includes knowing what needs doing, who is supposed to do it, when it is supposed to be done, and tracking the required resources by cost element and/or cost code.

Normally, senior management appoints the project manager. The project manager is accountable to the program manager, general manager, vice president, or president depending on the size of the organization. The project manager is accountable to the customer for project success. The project manager also has the delegated authority to commit the organization on matters concerning performance that are within the contract scope.

If generic resources are used in the Project schedule, the project manager becomes the default task and asset owner.



The Resource Manager Role

The **resource manager** is responsible for assigning the work to the resources within a project. They may also be empowered to add or remove resources from the Enterprise Resource Pool.

Adding, updating, removing, and merging resources on projects are duties that are performed by either the administrator or the resource manager. The resource manager may also be responsible for tracking metrics and reporting to management on resource performance.

Advisicon's *Microsoft Project Server: Project Manager* training course is designed to help resource managers learn how to use Microsoft Project and Project Server to create, assign, analyze, track, and report on project resources. This manual and training enables resource managers to use Project Server to manage resources and their updates.

The Team Member Role

The **team member** is usually one of the project members who is not responsible for building the schedule, but may have input into duration and level of effort requirements so that an accurate schedule can be created.

The team member is responsible for providing work or performing activities within a project, where the project manager assigns the team member tasks based on the project schedule. They report their activities either by timesheet or status report.

Team members interact primarily with projects through Project Web Access (PWA) and not through Microsoft Project Professional. Sometimes a project manager, team lead or administrator wears multiple hats and can perform work on another project as a team member. This does not exclude their permission in Project Server, it only means that they will have some accountability on other tasks. They must still perform their other duties as assigned.

Advisicon's targeted training course: *Microsoft Project Server: Team Member* helps project team members and project contributors learn how to use Project Web Access to view and update their project tasks, update and collaborate on project issues, risks and shared documents, as well as how to use PWA timesheets.

Key Points to Remember

We covered how Project Server supports project management, and how it is also able to support important aspects of integrated program and portfolio management. As part of a larger EPM solution, Project Server provides a consolidated view of projects across an enterprise, and allows critical control, reporting, and analysis for program and portfolio managers.



Chapter 4

Program to Portfolio Management with Project Server

Overview

Previously, we described some of the features and functionality of Microsoft Project Server 2013 as an enterprise project management system. In “Program to Portfolio Management with Project Server”, we will highlight some of the ways in which Project Server is designed to support program and portfolio management.

We will look at the following:

- What are program and portfolio management?
- How Project Server supports program and portfolio management
- Rolling up metrics for Project-to-Portfolio Management
- Supporting fact-based decision-making and “What If” scenarios
- Supporting strategic planning
- Line of Business integration
- Reporting capabilities
- Connecting databases
- SQL Reporting Services
- Custom WebParts

Upon completion of this chapter, the participant will be able to:

- Understand Project Server’s role and value in program and portfolio management

Projects, Programs and Portfolios

Project Server 2013 in Portfolio Management

The Microsoft Enterprise Project Management (PPM) solution is an end-to-end collaborative project and portfolio management environment. Microsoft PPM helps organizations establish visibility, insight, and control into their organization by standardizing both project and portfolio information, and by improving organizational alignment with the business strategy – which in turn maximizes resource utilization and provides metrics for operational efficiency. The Microsoft PPM Solution's scalable, extensible, and customizable architecture enables effective integration with other line-of-business solutions (such as ERP systems or external SharePoint sites) and Office system applications.

It is important to understand that the disciplines of Project, Program and Portfolio management are very different.

While many people readily get Project and Portfolio management, Program management in many instances is not understood, nor is it applied to Project Professional or Project Server PPM as a technology solution.

Many project management solutions out there often fall short of supporting PPM by only delivering partial solutions. For example, simple task management with no full resource tracking is not an effective PPM solution as it fails to deliver both demand and capacity management.

Certain projects (projects that the category of “Programs” can be applied to) must typically incorporate diverse elements such as physical products, services, support, custom integration, and channel development. These

different elements require coordinating multiple related projects, all of which must be successfully integrated at just the right time in order to deliver a complete solution that the customer is willing to pay for.

While a Program can be a single project that continues after the initial success or key delivery (with a hand-off to Operations or Maintenance), a Program can also be a combination of multiple independently managed projects all designed to integrate together (similar to writing software code, where each module integrates to run the program as a whole). Each project within a Program is designed to elicit and complete an overall and final result, solution or product for an organization.

While separate, uncoordinated projects may deliver a subset or a component of a program successfully, they alone can't do the job of delivering a complete solution, this is where a program can. A program is a coordinated way to manage a group of related projects, thus obtaining business benefits that would be impossible if they were managed independently.

A good example of the business benefits of a program is a joint vendor and customer project, or one that a state agency (such as Department of Health and Human Services) needs to develop a user interface for both local companies, hospitals, state employees to use to manage their individual healthcare needs. While each stakeholder group has different needs, the overall project (really a program) is being coordinated with subcontractors, state employees and delivering different functional portals, reports and data input portals to different groups. While each one may be a project, all them, collectively being integrated is a program.

Organizations as diverse as Microsoft, Intel, NASA, and IBM have found that programs are essential for creating complex, integrated solutions such as the scenario described above.

A program is not just a large project nor is it a project on steroids. Instead, its primary function is to coordinate and integrate a collection of separate projects like a conductor leads an orchestra. These individual initiatives are similar to players in an orchestra playing the necessary notes: projects (the individual musical instruments/players) integrated by a program do most of the real work. These players may make beautiful music, but without the coordination of a conductor, the music created by a collection of independent players would not harmonize and integrate in a symphony of sound.

Similarly, a collection of individual projects without a program will fail to create an integrated product or solution.

Microsoft's PPM solution allows you to coordinate work across multiple projects, expose deliverables to a SharePoint site for linking and reference back to MS Project schedules and integrated different functional groups. Project PPM makes the best use of limited resources by centralizing the updating of your project tasks, resource assignments, your risks, issues and documents all integrated in one portal. If your organization uses a PMO, this tool supports the organizational framework required to govern portfolio, program, and project management.

Project PPM Supports

- The business value of project, program, and portfolio management and how it complements project management.
- A program of tightly related projects targeted at a shared objective including conquering complexity, dealing with shared resources, and managing cross-project dependencies and priorities.
- Organizational considerations such as governance, stage gates, and matrix responsibilities.

Project Management

Project management focuses on delivering requirements to a customer. Peter Drucker, considered by most people to be the founder of Project Management said "Project management is about doing projects right. Portfolio Management is about doing the right projects". Project Server is a powerful tool for helping project managers and PMOs plan, track and manage projects consistently and effectively. Project Server helps centralize project data, helping to ensure that there is just "one version of the truth" about any project or group of projects at any given time. Tying back

to making good business decisions to select the right projects and then manage them well. Project PPM provides a historical record of each project that can provide a solid basis for billing, financial analysis, performance evaluations, and future process improvements.

Program Management

Program management is the discipline of managing a group of related projects and activities, such as a group of projects related to a particular product line. For example, the Space Shuttle Program encompasses all of the projects focusing on the different Space Shuttle missions, launch vehicles, and scientific projects related to them.

There may be many programs within an organization. The goal of program management is to coordinate, align and optimize projects to achieve the overall business objectives of a particular service or product area.

Program management is often concerned with managing all of the resources of an organization more efficiently. A common objective of program management is the coordination of timelines to achieve larger production criteria such as deadlines, product interoperability, and economies of scale.

Portfolio Management

Portfolio management is about doing the right projects by aligning project selection across an entire organization or company with the organization's global strategy. The focus of portfolio management is on identifying the metrics that should guide the decisions about which projects should and should not be pursued. Metrics that portfolio management is concerned with are:

- Organizational priorities.
- Business objectives.
- Strategic values.

In some organizations, the Project Management Office (PMO) focuses on tactical project management process definition and controlling activities. These are critical elements in achieving project management maturity. Beyond managing projects effectively – doing projects right – how can an organization ensure they are selecting the right projects to deliver the strategic business values their company is pursuing? How do they consistently choose the right projects to carry out?

Organizations sometimes create both a tactical PMO for projects and a strategic PMO which focuses on portfolio management priorities. This is becoming more common in organizations that have multiple tactical PMOs working on different programs in order to align all of their PMOs and programs with the overall company strategy.

Rolling Up Metrics for Project-to-Portfolio Management

Project Server can provide critical value in a program management process by serving as the central repository for all of the projects in a program.

Project Server provides centrally administered planning through SharePoint sites (Project WorkSpaces) to facilitate active and centrally-administered document sharing and collaboration. Program and Portfolio Managers can support their program and portfolio criteria by using Project Server to create custom fields, tables, views, reports, SharePoint sites, Project WorkSpaces, and templates that support and standardize their projects.

As a database, Project Server is designed to roll up the values of all the data into summaries at project, group, organizational, resource, and other levels. The power of Project Server to aggregate data from multiple projects is very valuable to any organization trying to gain visibility to the full range of their project activities.

Supporting Fact-Based Decision-Making

Organizational culture tends to reinforce history and usually reflects the leadership. They make the same decisions the same way they always have. With some organizations this means the process is very subjective; individual opinions and personalities are the dominant factors in project selection and management. In more mature organizations, there may be a clear, rational process for project selection, but the vision is narrow, focused on the objectives of its own organizational silo.

The goal of portfolio management is to evaluate all projects across an organization using a standardized set of criteria which is applied to all projects, activities, and programs. These criteria or metrics are derived from the organizational priorities, like profitability, new market development, revenue generation, quality, safety, employee development or retention, efficiency, compliance with industry or legal standards, and so on.

Project Server provides a powerful set of integrated tools to support an organization's efforts to plan, track, and analyze all of its activities. The ability to plan and track all the way down to the detailed task level and roll up all of the data to the highest organizational level gives an organization lots of options for gathering business intelligence, which can then be used to make decisions based on facts and move away from the dependence on anecdotal evidence, personalities, and untested opinions.

What If Scenarios

Project Server allows managers to model many “What If” scenarios based on all of the known commitments, plans, and limitations within their organization. Using Project Server’s many views of resource allocations and availability, managers are able to see the impact of changes to their projects and activities.

This dynamic reporting or immediate results tied to what if changes and scenarios is extremely powerful for executive and leadership stakeholders (such as PMO managers, or C-Level officers).

The Project Server system allows management to dynamically model different possibilities. This helps management to identify opportunities clearly and immediately, without suffering the lag time and information limitations of static reports from business analysts and DBAs.

Line of Business Integration and Reporting Capabilities

Microsoft Project Server is an enterprise SharePoint Application that utilizes a SQL Server back-end. This increases its value to an organization in many ways. Microsoft has leveraged the power and flexibility of their SQL database platform. SQL Reporting Services, SQL Integration Services, and SQL Analysis Services provide a universally useful set of services for business intelligence in any organization.

Since Project PPM sits on SQL Server, it can leverage SQL Integration Services to integrate with many other line-of-business systems, thus leveraging its power and value for providing business intelligence and a single source of information for any organization.

Excel or Excel Services, Visio Services or Access Services are a continued example of Office integration with Project PPM. These systems working in conjunction with SharePoint allow continued integration and extensibility with other Line of Business solutions or daily organizational tools used across the organization.

Connecting Databases

By connecting different databases (both SQLServer and non-SQL Server), in an organization with Project Server organizations can avoid duplicate data entry and (perhaps more importantly) avoid data duplication and corruption. This level of capacity for integration can help organizations achieve “one version of the truth” – a critical objective in ensuring data integrity and management’s confidence in the data.

SQL Reporting Services

Microsoft has leveraged the power and flexibility of their SQL Server database platform to allow for on premise implementations of Project Server to provide extended business intelligence reporting through SSRS. In addition to Project Server's own reporting database, SQL Reporting Services can be used to provide an even more substantial source for gathering business intelligence.

Custom WebParts

Microsoft has also leveraged the flexibility and user-friendliness of SharePoint Services by building Project Server within a SharePoint environment. In Project Server 2003, SharePoint was only used for managing risks, issues, and shared documents. In Project Server 2013, everything operates within a SharePoint environment which makes the user experience far more consistent and predictable.

In a sense, now all elements of Project Server operate as WebParts within a SharePoint environment. This also allows users to extend the functionality of Project Server by integrating custom functions into their Project Server environment using custom WebParts.

Summary

Microsoft Project Server 2013 is the centerpiece of Microsoft's Enterprise Project Management solution and offers many features, benefits and values to organizations pursuing excellence in project, program, and portfolio management. Project Server has been designed to provide important functionality all the way from planning and managing project deliverables to aligning projects and programs within an organization's global portfolio.

Key Points to Remember

- Project Online and Project Server (on premise) provide a streamlined interface through SharePoint while centralizing the information into a SQL Server database, providing additional automation, integration services and business intelligence and reporting services.
- Project Online may not leverage SSRS, but the extensibility of Excel Services, including the now embedded Power View reporting capabilities gives PMs and the end user a much easier time in creating dynamic reporting
- Project Server covers Project, Program (integrated schedules) and Portfolio Management (both new and existing work), by blending demand and capacity through its architecture to capture tasks, new work and compare it to a common its Resource Pool.



Chapter 5

Scheduling

Creating a SharePoint Tasks List Project

When detailed schedule and resource management are not required, or for a simple project, we recommend using a SharePoint Tasks List project. This feature allows a project manager to very quickly generate a to-do list of items without requiring all the rigor of a detailed schedule.

Advantages of a SharePoint Tasks List project include:

- Easy to create.
- Provides an alternate indicator in the Project Center.
- Start date, due date and resource assignment fields are optional.
- Limits update methods to done/not done or percent complete.
- If a start date and due date are provided a duration is automatically calculated.
- Can be converted to an enterprise project with a detailed schedule at a later time.

Disadvantages to using a SharePoint Task List project include:

- Tasks with resources and start dates and due dates create a resource utilization of 8 hours per day which cannot be changed.
- Resource is unable to update task from their Tasks or Timesheet page.
- May require some configuration to match the needs of the organization if the SharePoint project may eventually be converted to an Enterprise project.
- Does not include the Project Pro to SharePoint Task link sync feature. This feature is available only when running Project Pro in desktop mode (computer option at startup).

How to create a SharePoint Task List project:

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Projects** tab, in the **Project** group, click the **New** dropdown and then click **SharePoint Tasks List**. Notice the Quick Launch menu has changed and you are now seeing the **Tasks** page.

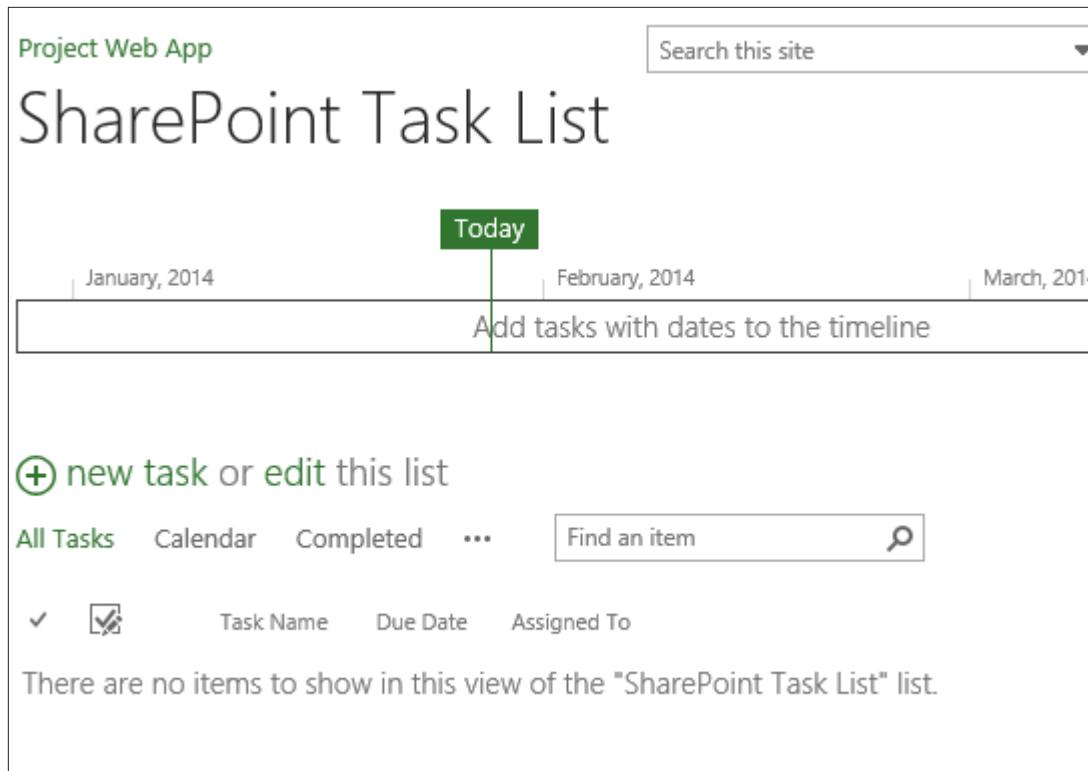


Figure 5-1 SharePoint Tasks Lists Project

How to navigate out of a SharePoint Tasks List project:

1. In the (SharePoint Tasks List) **Quick Launch** menu, click **Project Details**.
2. On the (PWA) **Quick Launch** menu, click **Projects**.

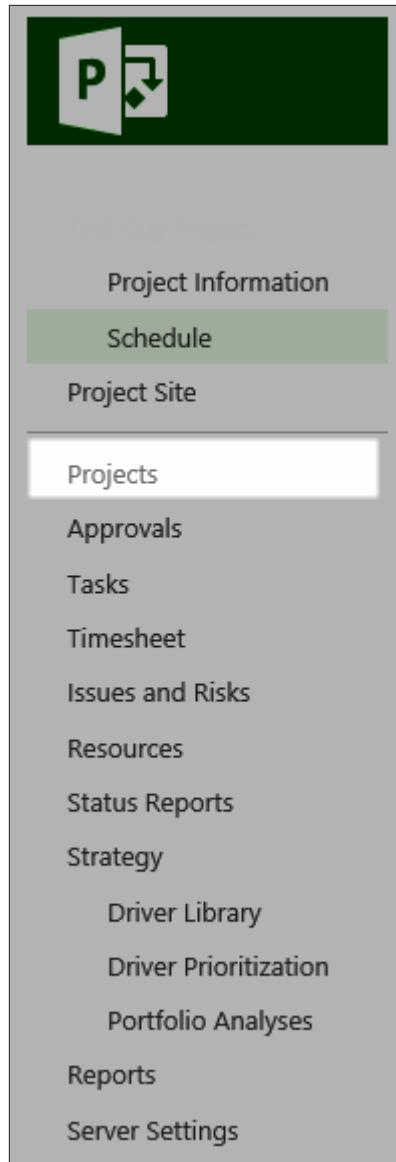


Figure 5-2 Using the Quick Launch to Navigate out of a SharePoint Tasks List Project

What might seem logical to navigate out of a SharePoint Tasks List actually navigates you back to the Home page of the SharePoint Tasks List not the PWA home page. Advisicon recommends you practice the above steps until they become familiar to you.



How to edit a SharePoint Task List project:

1. In the **Quick Launch** menu, click **Projects**.

	Tax Checker	...	7/25/2013	12/20/2013	0%
	Software Development Plan	...	10/17/2013	10/17/2013	0%
	Testing Views	...	10/15/2013	10/15/2013	0%
	Tye Test 082613	...	8/26/2013	1/28/2014	0%
	-Tye Test 12614	...	1/27/2014	1/30/2014	0%
	Voice Recognition Product	...	7/25/2013	12/10/2015	0%
	Warehouse Pick-n-Pack solution	...	7/25/2013	5/11/2015	0%
	Word Processing System Upgrac	...	7/25/2013	1/17/2014	0%

Figure 5-3 Editing a SharePoint Tasks List Project from the Project Center

2. On the **Project Center** page, click on the name of the SharePoint Task List project. Notice that you are placed on the **Tasks** page and can immediately begin editing.

Setting up the Project Professional Connection to PWA

Project Pro can support running in local computer mode or connected to Project Server mode. Since we want to take advantage of connected mode for all functions in this book, there is a one-time setup required.

How to set up the PWA account in Project Pro:

1. Launch Project Pro.
2. On the **File** tab, click **Info** and then click **Manage Accounts**.
3. In the **Project Web App Accounts** dialog box, click **Add**.

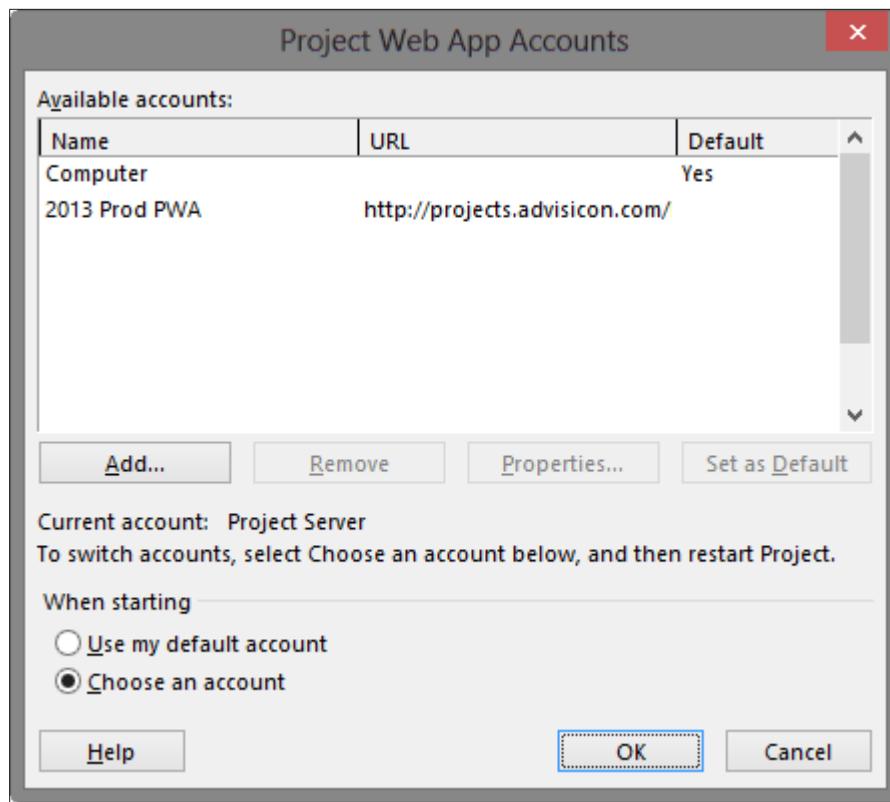


Figure 5-4 Project Web App Account Dialog Box

4. In the **Account Properties** dialog box, type the **Account Name** and **Project Server URL**.
5. If desired, click the checkbox to **Set as Default Account** and then click **OK**.
6. In the **Project Web App Accounts** dialog box, click **OK**.

Laptop users may want to leave “choose an account” enabled in case you want to run in “computer” mode when not connected to your organization’s network.



7. Restart Project Pro.
8. In the **Login** dialog box, ensure the newly created account name is selected as the **Profile** and click **OK**.
9. If required, you will be prompted for a login and password to Project Server.
10. You are now ready to use Project Pro connected to PWA.

Project Pro supports multiple connections to different PWA instances. For organizations with strict security requirements between divisions, this could be a useful feature.



Differences Between Scheduling in PWA and Project Professional

PWA scheduling is kind of like running Project Pro “light” as the PWA features represent a subset of the features available in Project Professional.

Task creation, task management and simple resource assignments are well suited for PWA scheduling. It provides a very fast and efficient method of making changes. However, PWA scheduling lacks the full functionality of Project Pro and is not suited for very detailed schedule functions such as advanced task and resource configuration, configuring personalized views, and running advanced schedule analysis features (including task inspector, leveling, and team planner view).



There is a cost savings to an organization in providing PWA scheduling features only instead of also providing Project Pro.

Creating New Projects in PWA

Creating projects in PWA is simply a matter of choosing what you need from a dropdown list. This approach provides two project options – enterprise projects or SharePoint task list projects (see *Creating a SharePoint Tasks List Project* on page 58). In a new install of Project Server, these project types do not contain any default data. Most organizations recommend starting projects in PWA because organizational standard fields and options are displayed immediately. This could also be a good choice when a project management process is being modeled.

The list of projects is configured by each organization and may include a combination of Enterprise and SharePoint Tasks List projects. The list typically spills over into a pop-up sublist. Schedule templates and custom pages that are displayed after selecting a project type are configured by each organization.



How to Create a New Enterprise Project in PWA

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Projects** tab, in the **Project** group, click the **New** dropdown and then click **Enterprise Project**.
3. On the **Project Details** page, fill in the desired fields of information.

The Project Details page contains fields that are important for reporting in PWA. The list of fields will vary based on the configuration by your administrator.



Project Information: New Enterprise Project

* Indicates a required field

Project Fields

Name *

Description

Start Date * 

Owner

Project Departments

Figure 5-5 Project Details Page for an Enterprise Project



A field with an asterisk symbol must be filled in before you can save the changes to the page.

4. On the **Project** tab, in the **Project** group, click **Save**. Notice the processing message on the upper right side of the window. You should wait until the Save is complete before performing another action.
5. On the **Project** tab, in the **Project** group, click **Close**.
6. In the **Check In** dialog box, ensure **Check it in** is selected and click **OK**. Notice you have been returned to the Project Center and your project is listed.

Checking Out and Checking In Projects in PWA

Only the owner of a project can check it out in PWA and make changes to it. Team members can view read-only project details via the Project Center unless blocked by the administrator.

Hyperlinking on the project name and then choosing Edit on any of the project pages is how you check out the enterprise project in PWA. Choose Close on any of the pages to check in the project in PWA.

How to check out and check in an enterprise project:

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, click on the name of the enterprise project.
3. In the Quick Launch menu for the selected project, click **Schedule**.

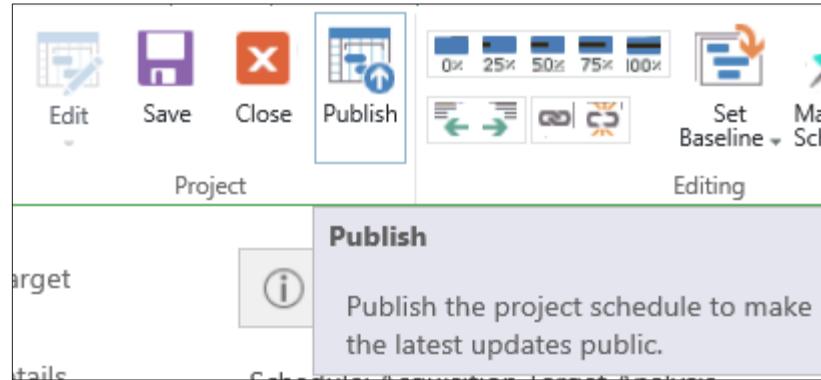


Figure 5-6 Project Group on the Task Tab

4. On the **Task** tab, in the **Project** group, click **Edit** and then click **In Browser**.



The status line provides a reminder to you if the project is currently checked out or not.



For projects that are open, each link on the top left side of the quick launch is a page available to that project. Notice that the Schedule is also listed as a page. Pages are turned on or off at the discretion of the administrator for each type of project.



Warning – Clicking the back button on the browser will navigate to the Project Center but will not check in the project. Click on the name of the project to hyperlink back to the checked out project and click **Close** to check it in.

Checking Out and Checking In Schedules in Project Professional

Like PWA, only the owner of a project can check it out in Project Pro and make changes to it. You should use Project Pro when detailed and advanced scheduling functions are required. Team members typically do not have access to the schedule in Project Pro.

Opening the project in Project Pro gives you the ability to check it out and closing the project gives you the option to check it back in.

To check out a schedule in Project Pro:

1. Launch Project Pro.
2. On the **File** tab, click **Open** and click the **PWA account name** and click **Browse**.
3. In the **Open** dialog box, double-click **Show me the list of all projects**.
4. Select the desired project name and click **Open**. Notice the project is displayed in read-only mode by default. Click **Check Out** on the status line to allow edits to the schedule.

If needed, you can modify the fields that are shown on the Project Details page in PWA in Project Pro by using the **Project** tab, **Properties** group, **Project Information** button.

Projects are cached locally each time they are opened in Project Pro. This will speed up opening the project next time. You should clean up the cache on a regular basis as a best practice or if you begin to have difficulty checking out the project. Cleaning up the cache is covered in Chapter 12, *Managing Project Manager Preferences*.



To check in a schedule in Project Pro:

1. On the **File** tab, click **Close**.
2. In the **Close** dialog box, select **Save** (if required), select **Check it in** and then click **OK**.

Saving Versus Publishing Changes

While you are editing projects, you have the option to save and the option to publish. It is important to learn the purposes of these two options.

- **Save** – You should save schedule changes when you are in a planning mode and not ready to share the schedule globally. An example of when saving is appropriate is when you anticipate it will take several days to fully develop the schedule and you do not want feedback until you have finished creation of the schedule.
- **Publish** – You should publish the schedule when you want schedule changes to be visible in the Project Center, when you want resources to receive their assignments, or when you want to synchronize information between Project Pro and PWA. Publishing also calculates the schedule in PWA. Auto-calculation is turned on in Project Pro. As a shortcut, publishing your project also does a save.

It is a best practice to wait until Saving and Publishing are completed before closing and checking in your project. In PWA, the processing indicator appears in the upper right side of the screen. In Project Pro, the processing indicator appears in the lower right side of the screen on the status bar.



Refer to *Publishing Assignments* in Chapter 6, *Resource Management in Project Pro* and refer to *Publishing Task Assignments* in Chapter 7, *Resource Management in PWA* for more details about how publishing relates to resource assignments.



An exception to publishing is enterprise fields on the Project Details page in PWA which are discussed in *Creating New Projects in PWA* on page 65. They do not need to be published to be visible to others. An example of this exception is that enterprise fields can be displayed in columns in the Project Center.

How to save in PWA:

1. The schedule you wish to save and publish should already be open and checked out.
2. In the **Task** tab, **Project** group, click **Save**.

How to publish in PWA:

1. The schedule you wish to save and publish should already be open and checked out.
2. In the **Task** tab, **Project** group, click **Publish**.

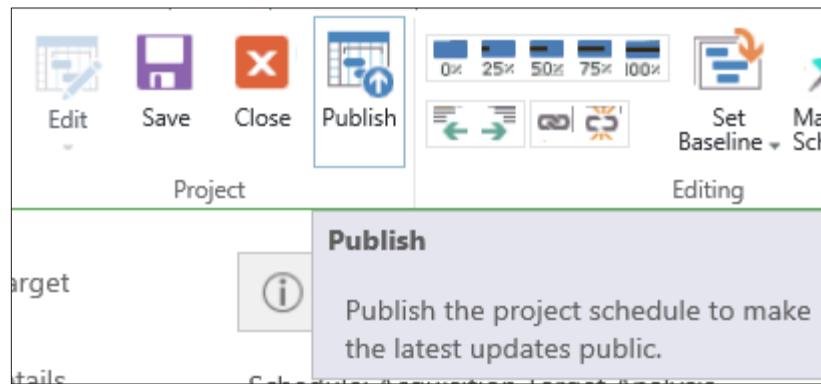


Figure 5-7 Publishing the Schedule in PWA

How to save in Project Pro:

1. The schedule you wish to publish should already be open and checked out.
2. Click the **File** tab to display backstage view and click **Save**.

How to publish in Project Pro:

1. The schedule you wish to publish should already be open and checked out.
2. Click the **File** tab to display backstage view.
3. On the **Info** tab, click **Publish**.

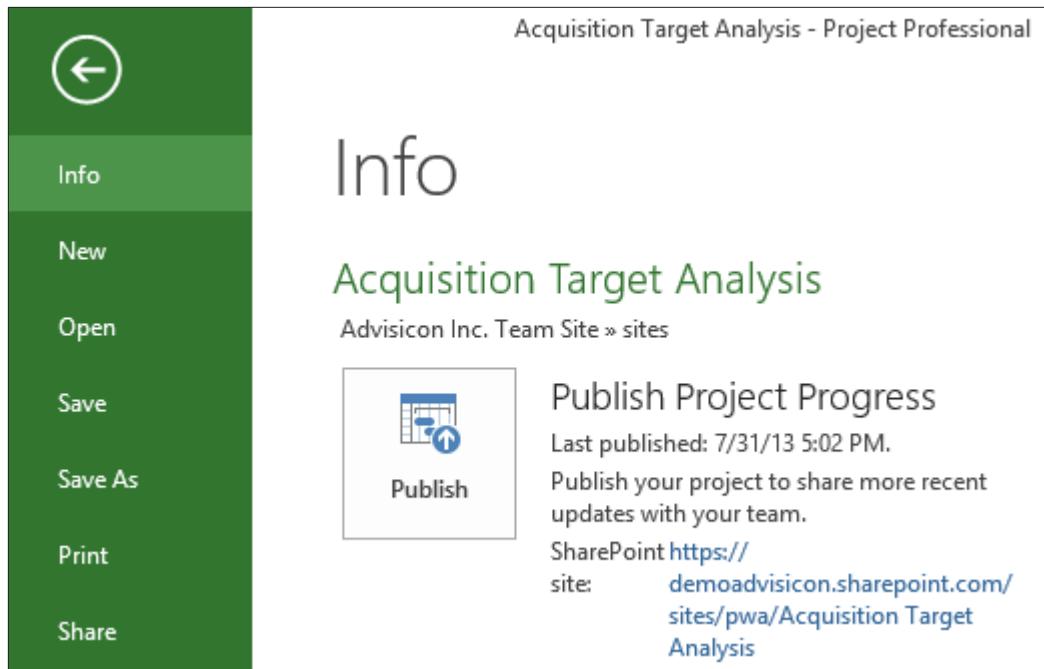


Figure 5-8 Publish in Backstage View

Be sure to watch the status of publishing on the status bar in the lower right corner. Wait until publishing is 100% complete to ensure the data has been fully synchronized with PWA.



Building a Schedule in Project Pro

Refer to our book *Introduction to Scheduling with Microsoft Project: Best Practices from Project MVPs*.

Building a Schedule in PWA

After the project is initiated, the next steps will be to edit and create a complete project plan. You can insert new tasks, organize them into phases, link them, create milestones, assign resources, etc. All this functionality is available through the browser.

Refer to Chapter 7, *Resource Management in PWA* for information about assigning resources.



You will continue to use Project Pro for more advanced project planning and tracking features such as viewing task warnings and suggestions, accessing Team Planner view, configuring task type and effort-driven settings, setting selected baselines, and moving tasks during tracking. However, for basic project plan editing and manipulation, PWA will serve as a great complement to Project Pro for project managers.

Manual Scheduling vs Auto-Scheduling

In developing your schedule and entering tasks, you will need to decide what mode you need for each task. PWA provides flexibility for project managers in developing schedules with the option of setting the task mode to manual or auto-scheduled. Historically in Project Pro 2007, PWA 2007 and all earlier versions, all tasks were auto-scheduled. Auto-scheduled tasks are controlled by Project's scheduling engine where specific information is calculated for you, such as the Start and Finish dates. This approach was best in creating fully planned project tasks.

However, many times a project begins with an informal lists of activities. These activities are at a very high level and do not have all the details

available, such as the duration or list of predecessors. In many cases the project manager is awaiting information from project stakeholders. Such activities are best suited for manual scheduling. These tasks are essentially ignored by Project's scheduling engine.

Manual scheduling gives complete flexibility to the project manager in terms of information to be entered in the Duration, Start Date, and Finish Date columns. When you create a manually scheduled task, the Duration, Start Date, and Finish Date columns turn into text supported columns so you can enter any information you need such as "Mid June" or "Pending Mgmt Approval." Unlike auto-scheduled tasks, manually scheduled tasks containing text details will not be modified when changes are applied to the overall schedule. Manually scheduled tasks serve as a visual reminder that further data is required before these tasks will be incorporated into the project schedule.



Manually scheduled tasks will begin to calculate information when you enter information that is recognizable by Project. For example, if you enter a Duration value and then link to another task, the Start Date and Finish Date columns will calculate.

For a detailed discussion about linking with manually scheduled tasks, refer to *Introduction to Scheduling with Microsoft Project: Best Practices from Project MVPs*.

To enter a task and change its task mode in PWA:

1. Ensure that your project is checked out **in Browser** and you are on the **Schedule** page in PWA.
2. In an available blank cell in the **Task Name** column, enter the name for the task and press **Enter**. Repeat as needed.



The cursor moves onto the next row indicating that you can continue entering another new task. `

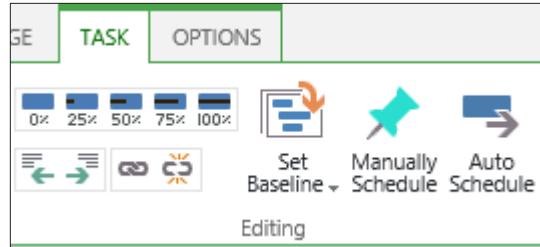


Figure 5-9 Manual or Auto-schedule Option

3. Select the desired task(s) and on the **Task** tab, in the **Editing** group, click **Manually Schedule** or **Auto-schedule** as desired.

If the task is in **Auto-Schedule** mode, the Duration, Start Date and Finish Date columns will automatically populate. Duration, by default, will equal 1 day (1d) and the start and finish dates will correspond to the project start date.



If the task is in **Manually Scheduled** mode, the Duration, Start Date and Finish Date columns will remain blank to be filled in manually.

You can also change the task mode by using the dropdown list in the **Mode** column to the left of each task's name.



Inserting and Deleting Tasks

During schedule development, you may discover that you missed a task in your task list or that a task is no longer needed. In these instances, you will need to either insert or delete a task.

To insert or delete tasks in PWA:

1. Ensure that your project is checked out **in Browser** and you are on the **Schedule** page in PWA.
 - To add a new task in the schedule, select the task below where you want to insert a new task. On the **Task** tab, in the **Tasks** group, click **Insert**.
 - To delete a task in the schedule, select the desired task. On the **Task** tab, in the **Tasks** group, click **Delete**.

Organizing Tasks into Phases

If you initially entered high-level tasks in PWA, you can break the structure down further into subordinate tasks. These are referred to as **sub-tasks**. When you add a sub-task, the top level task becomes a **summary task**. Breaking up summary tasks into smaller work units or sub-tasks is called a “top down” approach. You can also follow the “bottom up” approach by first creating sub-tasks and then grouping them under summary tasks.



Summary tasks and sub-tasks provide a great way to organize tasks into phases in PWA.

To organize tasks into phases in PWA:

1. Ensure that your project is checked out **in Browser** and you are on the **Schedule** page in PWA.

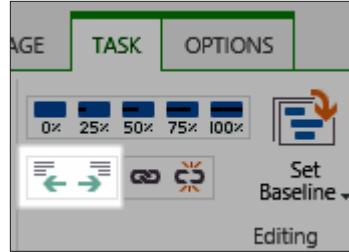


Figure 5-10 Organizing Options

- Select the desired task(s) below a task that will become the summary task. On the **Task** tab, in the **Editing** group, click **Indent**.
- Select the desired task(s). On the **Task** tab, in the **Editing** group, click **Outdent**.

By default, summary tasks appear in boldface type and the sub-tasks appear in normal type.



You can also select multiple tasks simultaneously and indent them creating a group of sub-tasks at one time. Select multiple tasks by holding down the **Ctrl** (to select tasks individually) or **Shift** key (to select a range) and selecting the appropriate tasks.



Linking Project Tasks

After organizing tasks into phases, the next step is to link dependent tasks. By default, all auto-scheduled tasks will start the day the project starts, which is normally not realistic. If this were true, you would be able to complete all tasks at the exact same time in the project and finish the project very quickly. Usually, some tasks must start or finish before others can begin. A task that occurs before another task is a predecessor task and a task that occurs afterwards is a successor task. Tasks with dependency relationships are noted by linking. In the Gantt chart, the links are presented in the form of lines between two task bars.

PWA provides a shortcut to the most common dependency type used in schedules – Finish to Start. In a Finish to Start dependency, a successor task cannot start until the predecessor task finishes.

To link or unlink tasks in PWA:

1. Ensure that your project is checked out **in Browser** and you are on the **Schedule** page in PWA.

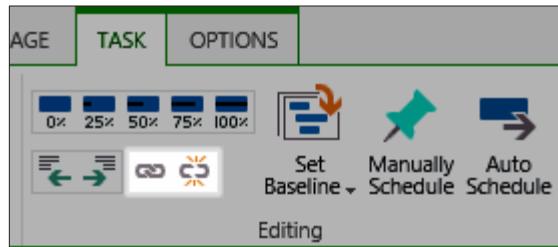


Figure 5-11 Linking Options

- Select the desired tasks that you want to link together. On the **Task** tab, in the **Editing** group, click **Link Tasks**.
- Select the desired tasks that you want to unlink. On the **Task** tab, in the **Editing** group, click **Unlink Tasks**.



You can select two or more tasks to link in a series. Use the **Ctrl** key to select non-adjacent tasks.



The first task you select is the predecessor to the second task. If you select more than two tasks, the predecessor is always the task you click before.



Chapter 6

Resource Management in Project Pro

Overview

Upon completion of this chapter, the participant will be able to:

- Differentiate between enterprise resources and local resources.
- Build a team of resources from the enterprise resource pool.
- Display generic resources in the enterprise pool and add them to the team.
- Apply two different approaches to assigning resources to tasks and be able to point out the advantages of each approach.
- Identify when a resource overallocation exists on a task.
- Evaluate the availability of a resource to do work on your project before adding them to your project team.
- Evaluate the availability of a resource from your project team before adding them to a task.
- Display workload and overallocation across projects using multiple views.
- Apply techniques to solve overallocations.
- List the benefits of Team Planner view.

Project Professional Resource Management

An important distinction between managing resources with Project Professional (Project Pro) and managing resources with PWA is that in Project Pro, you are managing task schedule assignments only. With Project Pro, you don't have the ability to manage the Resource Plan or the SharePoint Task list assignments. With Project Pro's advanced scheduling features, you have many more ways to create and edit task assignments and many easy ways to manipulate views to show the exact resource details you need very quickly.

Project Pro is the optimized interface for assigning multiple resources to multiple tasks, and for providing multiple resource availability options within the assignment process. Following this section, you will have a better idea of when to use Project Pro to manage your resource assignments.

A reminder: only the project owner has the capability to edit a schedule in Project Pro and manage its resource assignments.



In this section, we will assume that you are using Project Pro connected to Project Server. We will also assume that you are not using Project Pro in any other modes which have alternative benefits.

Local Resources vs. Enterprise Resources

Enterprise Resources are created by the administrator and represent a person, role, skill set, material, or other cost that is driven by its use to accomplish a task in the project. Normally an organization will create named enterprise resources to represent a person who will be performing

work and generic enterprise resources to represent a role or skill set for resource planning. The collection of all enterprise resources is referred to as the enterprise resource pool. Using an enterprise resource ensures there is a representation of that resource that all project managers and schedulers should refer to.

If you want to display resource assignments across the enterprise, you must use enterprise resources. Enterprise resources are added to each project as needed.

Some organizations have enabled **Local Resources** (a Project Pro only feature) which allow a project manager or scheduler to add a unique resource to a project. A local resource is never added to the enterprise resource pool or available in centralized reporting (such as the Resource Center in PWA).

The advantage of local resources is that they are one-time resources that can be accounted for in the project schedule, but the project manager does not have to go through the more involved, formal process of working with the administrator to get those resources set up in the enterprise resource pool. Normally, local resources are used for one-time vendors or temporary contract employees.

The disadvantage of local resources is that they will not be able to self-report status updates. This can put an extra burden on the project manager: someone must go out and ask for updates from each local resource and then manually enter them into the project schedule. Unfortunately, you will not know if another project manager has assigned their own personal local resource representing the same person in their schedule. Because of this, overallocation issues across projects are not visible.



You should check with your administrator if you are unsure of your ability to use local resources or to learn more about the recommended situations for using local resources on your projects in your organization.

Warning - Local resources cannot be turned into new enterprise resources.



To create a local resource:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the Project Web App account name and click **Browse**. If necessary, double-click **Show me the list of all projects**. Click the desired project and click **Open**.
4. In the **View** tab, in the **Resource Views** group, click **Resource Sheet**.
5. In **Resource Name**, enter a local resource name and press **Enter**.
6. Make changes to any additional columns as desired and press **Enter** to accept the changes.
7. In the **View** tab, in the **Task Views** group, click **Gantt Chart**.

		Resource Name	Type	Material	Initials	Group	Max.	Std. Rate
1		Management	Work		M		100%	\$0.00/hr
2		Project Manager	Work		P		100%	\$0.00/hr
3		Analyst	Work		A		100%	\$0.00/hr

Figure 6-1 Resource Sheet

Overview of Task Types

Task Types is an advanced task and resource planning feature for Project Pro scheduling. This feature is not available in PWA scheduling. **Task Types** allow you to set a combination of Task Type and Effort Driven options to control the calculations of related columns (such as Duration, Work, and Peak Units). The goal of this section is to introduce you to the concepts of working with Task Types and to provide best practices in planning a task and assigning resources.

Project Pro is set up for planning tasks by duration. This is the reason why there are question mark icons in each duration cell: they are a reminder that you did not enter a value for that task. The question mark symbol goes away after a number is entered. Typically, beginning users follow the approach of planning tasks by duration. If a schedule is created that will not use resources, planning tasks by duration is also the recommended approach.

With the introduction of resources into a project, your task estimating approach becomes important: as soon as a resource is assigned the scheduling engine performs a calculation.

The following scenarios will ensure that your preferred approach is applied when resources are assigned.

Duration Based Estimating

Let's say you would like to enter a duration value that remains constant regardless of the resources that are added or subtracted. This is called **duration based estimating**.

Some examples of tasks where duration based estimating is appropriate include:

- Attending a meeting
- Shipping time
- Cement curing

The length of time for these tasks are fixed and will not change based on the number of resources assigned.

The recommended practice is to estimate the duration of the task by entering a value into the **Duration** column, and then setting the value in the task Type column to **Fixed Duration**. Only then should you assign resources to the task.

This will cause total work for the task to be calculated.

The Effort Driven column provides a shortcut to equally divide the total work for the task across the resources assigned. This is useful for organizations that track costs or track resource assignments in detail.



	Task Mode ▾	Task Name	Duration ▾	Type ▾	Effort Driven ▾
1	➡	Infrastructure Deployment	194.75 days	Fixed Duration	No
2	➡	Scope	6 days	Fixed Duration	No
3	➡	Determine project scope	0 days	Fixed Units	No

Figure 6-2 Entry Table with Duration and Optional Columns

To follow this approach, insert the Type and Effort Driven columns in the Entry table of Gantt Chart view or display Task Entry view which provides these columns in the lower pane.

To Hide a Column:

1. Right-click the column heading and click Hide Column.

To Insert a Column:

1. Right-click the column heading and click Insert Column.
2. Click the desired column name.

You can type the first few letters of the column name to quickly filter the list.



You can also use the shortcut **Add New Column** on the far right side of the table.

Work Based Estimating

You also have the choice to enter a total work value for the task that will remain constant regardless of the resources assigned. This is called **work based estimating** or **effort-driven estimating**.

Some examples of tasks where work based estimating is appropriate include:

- Development.
- Moving equipment.
- Eating a pie.

The amount of work it takes to complete the task does not change, but the work may be distributed across multiple resources who might be performing the task concurrently. Project will change the calculated duration of the task based on the number of resources assigned.



Even if you add a new resource or subtract a resource the total work hours will stay the same.

The column in Project is labeled Work, but it actually represents Total Work.

The recommended practice is to estimate the total hours the task will take to complete by entering a value in the **Work** column, and setting the value in the **Task Type** column to **Fixed Work**. Only then assign resources to the task.



The effort driven option is set to “Yes” automatically for Fixed Work tasks.

This will cause total duration for the task to be calculated.

	i	Task Name	Durat ▾	Type	Effort Driven	Work
1		▪ Infrastructure Deployment	194.75	Fixed Duration	No	2,682 hrs
2		▪ Scope	6 days	Fixed Duration	No	24 hrs
3		Determine project scope	0 days	Fixed Work	Yes	0 hrs
4	!	Secure project sponsorship	1 day	Fixed Work	Yes	8 hrs
5	✓	Define preliminary resources	1 day	Fixed Work	Yes	8 hrs
6	!	Secure core resources	1 day	Fixed Work	Yes	8 hrs

Figure 6-3 Entry Table with Work Column

To follow this approach, insert the **Work** column into the **Entry Table** of **Gantt Chart** view. This is where you will enter your total Work estimate.

Do not enter anything in the Duration column. This value is now being calculated based on the resources assigned.



For a more detailed discussion of Task Types, refer to the Advisicon books *Introduction to Scheduling with Microsoft Project: Best Practices from Project MVPs* and *Advanced Scheduling with Microsoft Project: Power Scheduling from Project MVPs*.

Building a Team of Resources

As a project manager, you need to build a team of resources for each specific project. Project Pro's **Build Team from Enterprise** feature allows you to build a team of resources from the Enterprise Resource Pool and use them for task assignments on the current project.

Although the entire Enterprise Resource Pool is available on every project, it is not efficient to continually update each project with the complete list.

Doing so slows down system performance, including project publishing. The project team is a short list of resources that will be used for this one project specifically, and is more efficient for browsing project resources. Building a team is typically done right before assignments are made. Additional resources are added throughout the project when needed.



If you want your team of resources to include generic resources, refer to *Using Generic Resources* on page 92.

To build a team of resources:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Resource** tab, in the **Insert** group, click the **Add Resources** dropdown and then click **Build Team from Enterprise**.

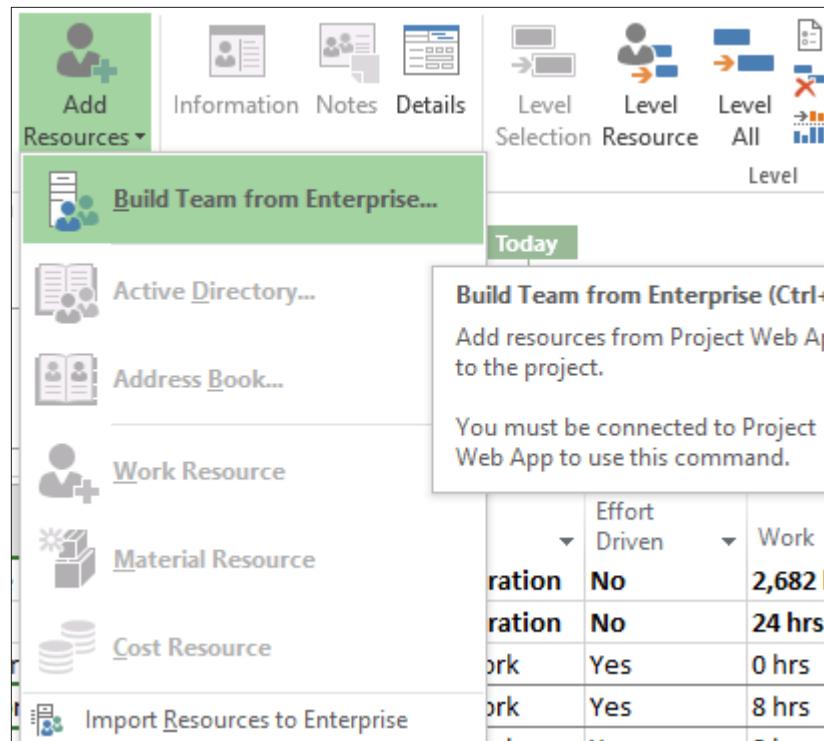


Figure 6-4 Add Resources List

5. In the **Build Team** dialog box, select the desired Enterprise Resource(s) on the left and click **Add** from the middle section.

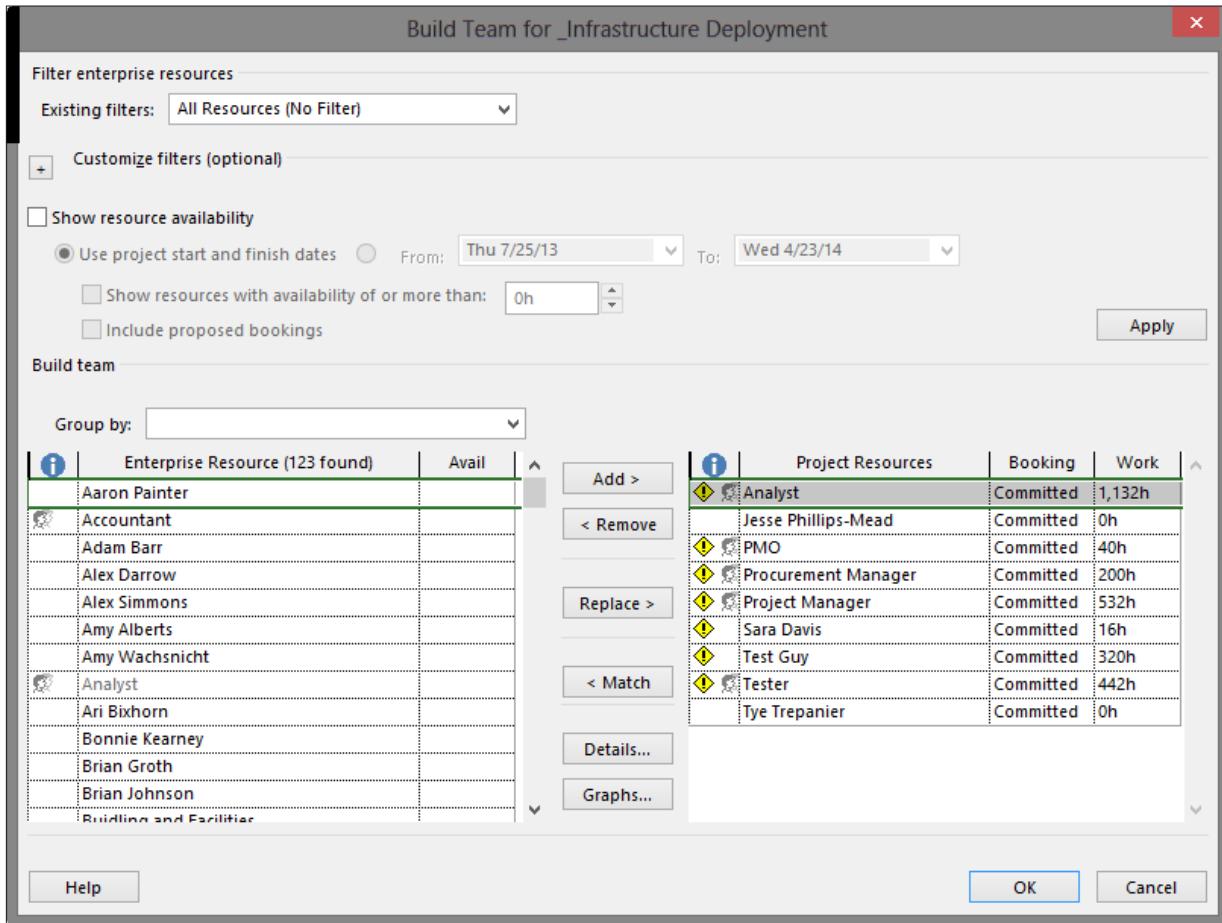


Figure 6-5 Build Team Dialog in Project Professional

6. Click **OK**.

The resources you have selected for this project are listed on the Resource Sheet or on the right side of the Build Team dialog box.



Using Generic Resources

A **generic resource** is a resource that has been created for the purpose of resource planning and it typically represents a job role, job title, or skill set. If you are unsure which individuals will be available for your project, you can select generic resources to help plan the resource needs for the project. Later, when you know who your resources are, these generic resources will be replaced with actual resources.

Generic resources are frequently used when planning activities that are far into the future or during the project proposal stage. Generic resources are selected from the Enterprise Resource Pool and added to your project.



Your project team can include both generic and named enterprise resources.

To build a team of generic resources:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Resource** tab, in the **Insert** group, click the **Add Resources** dropdown and then click **Build Team from Enterprise**.
5. In the Build Team dialog box, click the dropdown arrow next to **Group by:** and click **Generic**.
6. Under **Enterprise Resources**, click the minus (-) symbol next to **No**.
Notice that this hides non-generic resources.
7. Select the desired generic Enterprise Resource(s) on the left and click **Add**.
8. Click **OK**.

Assigning Resources with the Resource Names Column

Assigning resources to tasks is the process of picking resources from the project team to work on specific tasks. Assignments allow team members to view tasks they have been assigned on their Tasks page in PWA.

To assign resources to tasks:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Task** tab, **View** group, click **Gantt Chart**.
5. Scroll or drag the dividing bar until the **Resource Names** column is visible.
6. For the desired task, in the **Resource Names** cell, click the dropdown list and click the checkmark next to the desired resources you want to assign to the task.

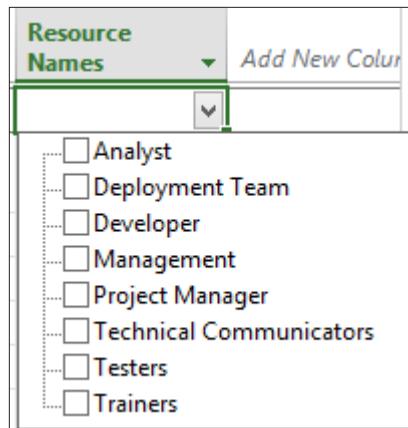


Figure 6-6 Resource Names Task Assignment Dropdown List

Assigning Resources with the Assign Resources Dialog Box

While using the Resource Names column is a very efficient method for making assignments, it is a very slow process when multiple resources need to be assigned to multiple tasks. The Assign Resources dialog is more efficient for complex assignments. This dialog box also visually provides other information such as who is currently assigned to the task and any calculated resource costs.

To assign resources to tasks using the Assign Resources dialog box:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Task** tab, **View** group, click **Gantt Chart**.
5. In the **Resource** tab, **Assignments** group, click **Assign Resources**.
6. Select the desired task(s) on the Entry Table in Gantt Chart view and select the desired resource(s) in the Assign Resources dialog box.
Click **Assign**.
7. Repeat until all assignments have been made.

	i Task Name	Duration	Start	Finish	Predeces
1	Infrastructure Deployment	195.75 days	Thu 7/25/13	Thu 4/24/14	
2	Scope	3 days	Mon 10/14/13	Wed 10/16/13	
3	Determine project scope	0 days	Mon 10/14/13	Mon 10/14/13	
4	Secure project sponsorship	1 day	Mon 10/14/13	Mon 10/14/13	3
5	Define preliminary resources	1 day	Tue 10/15/13	Tue 10/15/13	4
6	Secure core resources	1 day	Wed 10/16/13	Wed 10/16/13	5
7	Scope complete	0 days	Wed 10/16/13	Wed 10/16/13	6
8	Analysis	61 days	Wed 10/16/13	Wed 1/14/14	
9					
10					
11					
12					
13					
14					
15					
16					
17					
18					
19					

Multiple tasks selected (3,5,7)

Resource list options

Filter by:

All Resources 8h ▲ ▼ [More Filters...](#)

Available to work 8h ▲ ▼

[Add Resources ▾](#)

Resources from Infrastructure Deployment

Resource Name	R/D	Units	Cost	^
Jesse Phillips-Mead				Assign
PMO				Remove
Procurement Manager				Replace...
Test Guy				Graph
Tye Trepianier				Close
				Help

Hold down Ctrl and click to select multiple resources

Figure 6-7 Assign Resources Dialog Used to Make Multiple Task Assignments



The Assign Resources dialog box can remain open while you scroll through Gantt Chart view to locate desired tasks. This is a great timesaver.

Notice the checkmark that will appear next to resource names. This will indicate which resources are already assigned to the selected task.

Checking Resource Availability

While reactive schedulers assign resources to tasks without regard for initial resource overallocation issues (hoping a solution can be found later), proactive schedulers evaluate resource availability during initial assignment. This section provides information about these approaches that can be used when resource loading your schedule.

Watching for New Overallocations

The reactive approach creates an assignment and looks for overallocation indicators.



You may be curious why Microsoft did not prevent you from intentionally overallocating resources. In some organizations, resource management is separate from project management. Preventing a resource assignment to a task due to overallocation would restrict the scheduler's ability to create a fully planned schedule for sharing with the resource manager.

Also, it might generate a lot of errors that could become frustrating.

To display new overallocations:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Task** tab, in the **View** group, click **Gantt Chart**.
5. Confirm that the **Indicators** column is showing
6. Assign a resource using your preferred method.
7. Watch the **Indicators** column for the red overallocation indicator (stick figure person)

		▷ Scope	3.5 days	Tue 11/19/13	Fri 11/22/13		
		▷ Analysis/Software Requirements	14 days	Fri 11/22/13	Thu 12/12/13	Management	

Figure 6-8 Overallocation Indicator in Entry Table

Build Team Dialog Box

At Advisicon, we recommend that you use the Build Team dialog box if you want to check resource availability at the project level before choosing a resource for your project team.

To check for project availability:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Resource** tab, in the **Insert** group, click the **Add Resources** dropdown and click **Build Team from Enterprise**.
5. In the Build Team dialog box, click the checkbox **Show resource availability**, select the desired options and then click **Apply**.
6. In the Build Team dialog box, select the desired Enterprise Resource(s) on the left and click **Add**.
7. To display all resources again, uncheck the checkbox and click **Apply**.
8. Click **OK** to accept team changes.

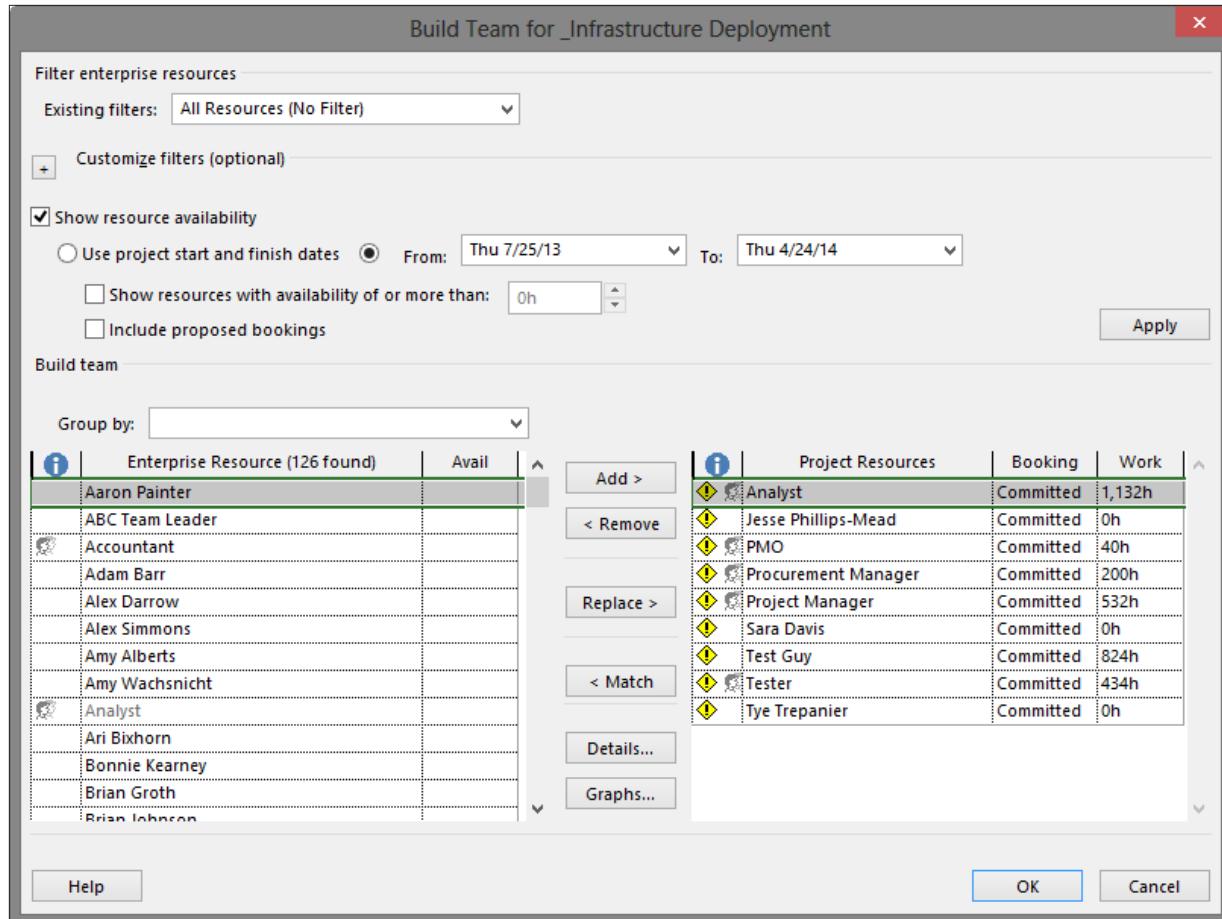


Figure 6-9 Assign Resources Filtered by Resource Availability for a Task

Assign Resources Dialog Box

If you want to check resource availability at the task level using resources already selected for your project team, we recommend that you use the Assign Resources dialog box.

To check for task availability:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Task** tab, **View** group, click **Gantt Chart**.
5. In the **Resource** tab, **Assignments** Group, click **Assign Resources**.
The Assign Resources dialog opens.
6. In the Entry Table, select any cell in the task row you want to check for resource availability.
7. In the **Assign Resources** dialog box, click the checkbox for **Available to work**, enter a value for the number of hours you will need a resource during the timeframe of the task and press **Enter**.
The resource list will automatically be filtered to hide un-assigned, unavailable resources.
8. Select the desired task(s) on the Entry Table of the Gantt Chart view and select the desired resource(s) in the Assign Resources dialog box.
Click **Assign**.
9. To display all resources again, uncheck the checkbox.

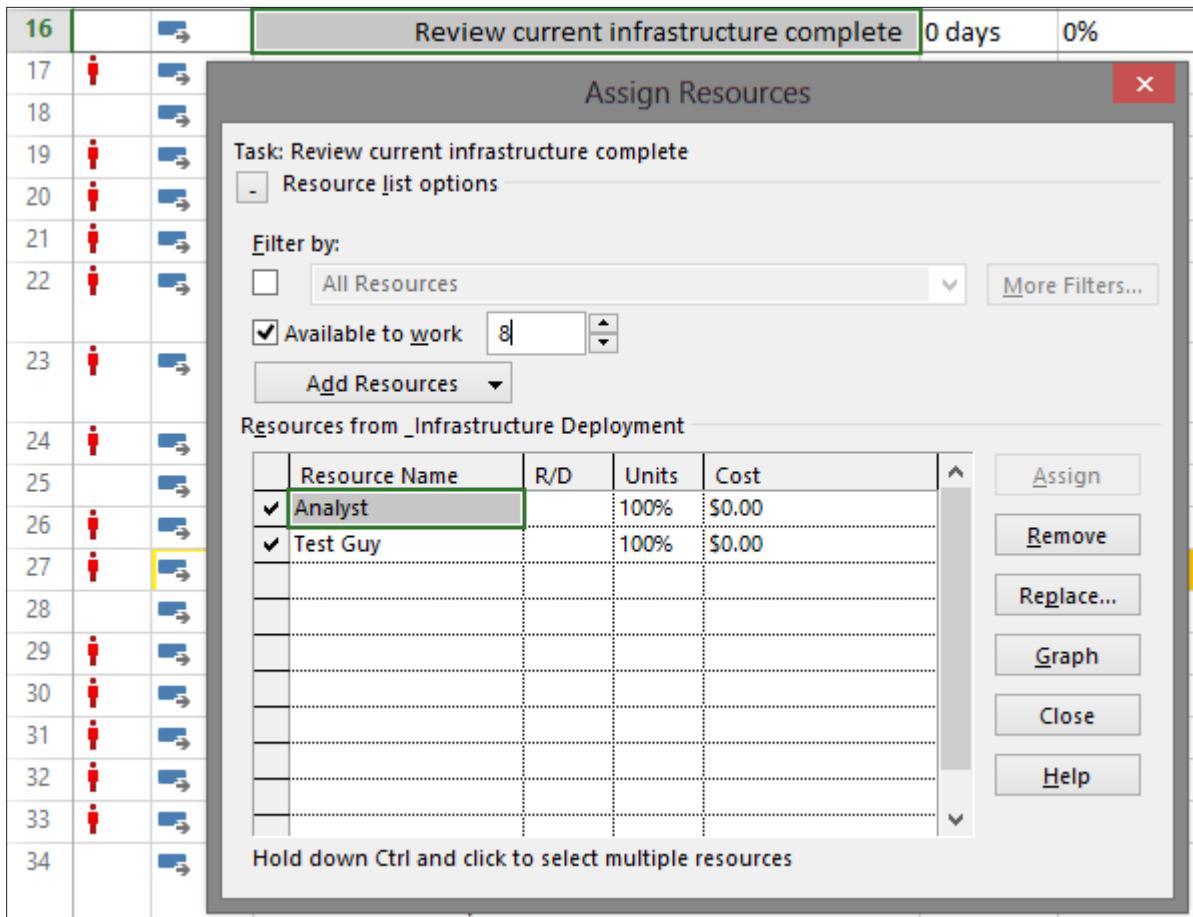


Figure 6-10 Build Team Filtered by Desired Resource Availability

Publishing Assignments

Publishing a schedule does several things in Project Pro:

- It saves recent changes.

- It makes schedule changes visible to others and finalizes task assignments so resources can see their tasks in their Timesheet or Tasks page.
- It fully synchronizes information in the database. This is useful when a change saved in Project Pro is not showing up in PWA.

To publish assignments:

1. The schedule you wish to publish should already be open.
2. Click the **File** tab to display backstage view.
3. On the **Info** tab, click **Publish**.

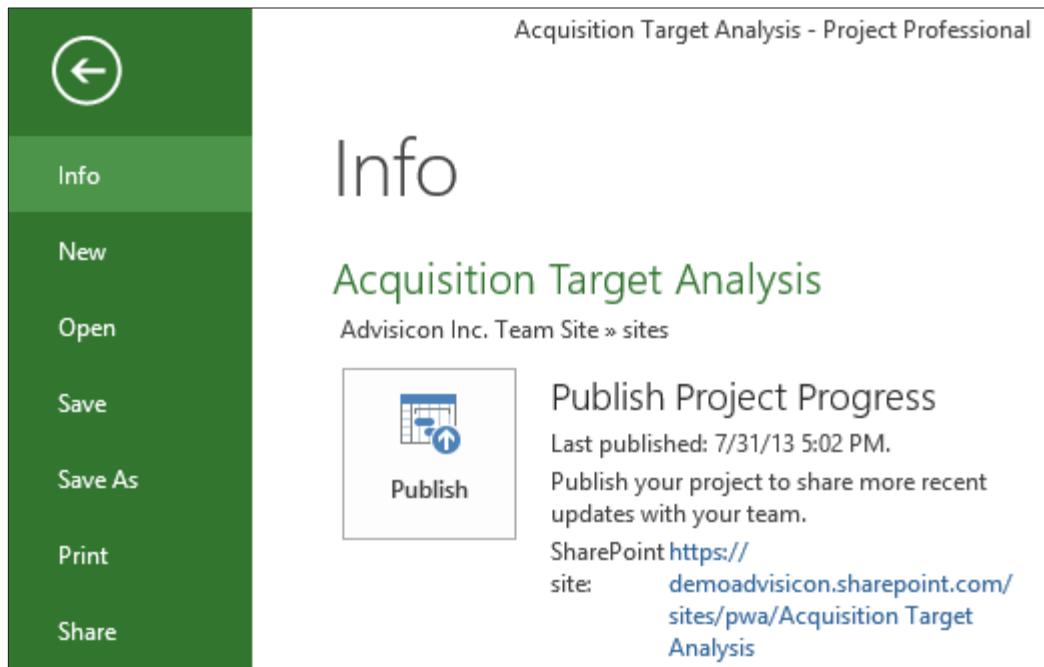


Figure 6-11 Publish in Backstage View

Be sure to watch the status of publishing on the status bar in the lower right corner. Wait until publishing is 100% complete to ensure the data has been fully synchronized with PWA.



Managing Overallocations

Resource options in Project Pro include reviewing resource availability and assignments. Previously, we used a proactive approach to choose resources. Now we will use the powerful reviewing features in Project Pro to identify existing resource overallocations. We will manage those overallocations with various techniques. You can also refer to Chapter 11, *Finalizing a Schedule* for additional ideas to resolve resource overallocations.

Displaying Overallocations on Existing Assignments

Since we have connected Project Pro to Project Server, all resource assignment information is shared across the enterprise.

One of the advantages of reviewing resource assignments in Project Pro is that you can choose the level of detail you want to see. For example, when you need the 30000 foot view you can display the work on each project at a high level. When you need the 10000 foot view, you can show all the assignments on the projects the resources are working on. The level of detail is controlled by which projects you have open.

Another advantage of using Project Pro to review resource assignments is that you can have one or more schedules checked out for editing and immediately make changes that will resolve any resource overallocations across those schedules.

To display overallocations on existing assignments:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.

4. In the **Task** tab, in the **View** group, click the **Gantt Chart** dropdown and select **Resource Usage**.
5. In the Usage table (left side) in the **Add New Column** dropdown, click **Project**.
6. In the timescale (right side) right click and click **Overallocation**.

		Resource Name	Work	Add New Column	Details	T	F	S
1		Personal Relationship Manager	832 hrs		Work	0h	0h	
2		Marketing Manager	596.32 hrs		Work	57.33h	64h	
		Complete SWOT analysis	40 hrs		Work			
		Review business model	8 hrs		Work			
		Review organizational marketing strategy	24 hrs		Work			
		marketing strategy			Work			
		Review local marketing strategy	8 hrs		Work			

Figure 6-12 Resource Usage View

With Resource Usage view configuration done in this way, you can see the names of each resource assigned to work in the current project. Below the resource name will first be a line titled **Other projects and commitments**. If you expand this title, you will see a list of the names of any other projects that have assigned work to the resource.

Below **Other projects and commitments** there will be a list of tasks from the open project. You can use the Project column to confirm.

Notice that in the Resource Usage view the name of the project is in the Resource Name column, not a separate Project column. Should you want to see the actual tasks the resource is working on in the other projects, you will need to open those projects. Once the additional desired projects are opened, the Resource Usage view will automatically update.

On the right side of the Resource Usage view you can easily identify the amount of overallocation at specific points in time on tasks or projects. If you adjust the level of detail of the timescale, you can see a summary of overallocation for a block of time such as a month, or a quarter.

You can use the Resource Usage view to fix an overallocation or you can return to the Gantt Chart view to fix an overallocation. Some options for resolving an overallocation are listed below:

- Choose an alternate resource.
- Smooth the hours out across a time period to reduce the number of high and low points.
- Assign the resource as a part-time resource on multiple tasks.
- Postpone a task until a resource is available.
- Use Team Planner to further analyze (see *Working with Team Planner View*).
- Use leveling to allow the software to attempt to resolve the conflict.



For Project's automatic leveling to be effective in Project Server, it requires that the project manager or scheduler have the ability to open and edit all other projects that the resource is working on. In most organizations, this is not the case. So, at Advisicon, we recommend our clients manually solve resource overallocations using other methods instead.



If a resource has been removed from your project, you can use the Build Team dialog box to replace all instances of the resource throughout your project. This feature will only replace the resource on remaining work, historical actuals will be preserved.

Some techniques to solve overallocations at the task level will be addressed in the next topic.

Working with Team Planner View

While the Resource Usage view can help you see overallocation issues in the schedule, to correct these issues you must make adjustments to how the resources are assigned. That's where Team Planner view shines.

Team Planner allows you to completely focus on the resource and make your adjustments so the task modification instantly responds. Team Planner is a feature that was first implemented in Project 2010. This view is a robust graphical view that displays the name of the task in the timescale (instead of having to follow a task row from one side of the screen to the other). Team Planner view has a simple to use drag-and-drop interface for resolving overallocations.

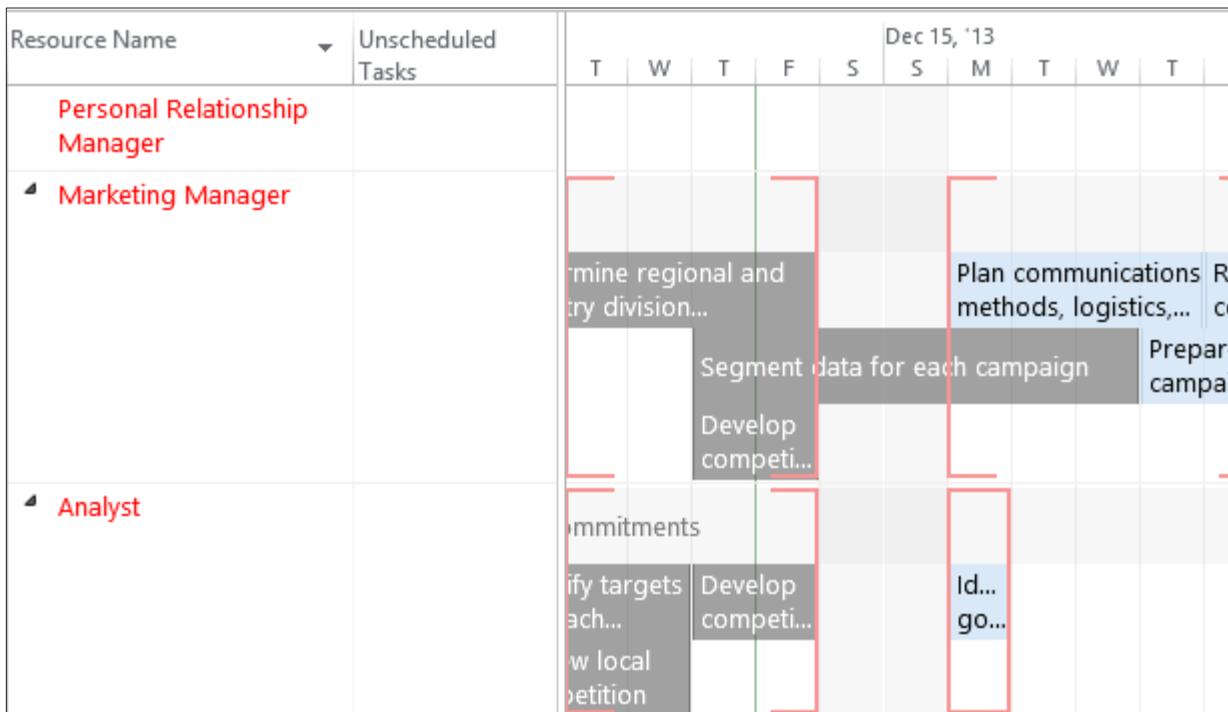


Figure 6-13 Team Planner View with Overallocated Resources

To display and correct overallocations using Team Planner view:

1. Navigate to Project Professional.
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Task** tab, in the **View** group, click the **Gantt Chart** dropdown and click **Team Planner**.

5. Locate the overallocated resource and task you wish to make changes to.

- Hover on the task to view relevant details.
- Right-click on the task name to quickly reassign the task, delete it, or deactivate it.
- Double-click the task to view the Task Information dialog box and make any needed changes.
- Drag the task in team planner view to reassign or move the task to a locked in time period (sets a constraint)

6. In the **File** tab, click **Publish** to save the changes and share them with your project team via PWA.



Warning – If you see blank information within brackets on the right side of the view (the timescale), you will need to zoom out so the text crossing over multiple time periods can be displayed.



Double-click **Other projects and commitments** if you want to see the names of other projects your resources have been assigned to that are not currently open.

Key Points to Remember

- Project Pro provides detailed resource management for specific task assignments in a schedule.
- Local resources (if available) do not provide any reporting across projects and their use should be limited.
- Consider the task type settings before making assignments to ensure the value you want to remain constant will be enforced.
- It is easier to manage multiple resources on a project by assigning them to a project specific team. This allows you to select appropriate resources for the project, rather than always dealing with the entire Enterprise Resource Pool every time resources are managed on a project.
- Generic resources are a mechanism for proactively resource planning on a project. This alerts the organization as to the types of resources that will be needed on the project and when named resources are ready to be assigned. In Project Pro, you can easily replace generic resources with enterprise resources.
- Assign resources using the Resource Names column when you want to create a single task assignment.
- Assign resources using the Assign Resources dialog box when you want to assign multiple resources to multiple tasks or to evaluate resource availability at a task level.
- Publish is required before information will be synced with PWA. Once Published, resources will see their assignments.
- Replacing named resources (rather than deleting and adding a new resource) on a project allows for preservation of historical information.
- The Indicators column shows a red overallocation indicator immediately when a resource assignment creates an enterprise overallocation.
- Resource Usage view and Team Planner view can be used to evaluate and make changes to overallocated resources.



Chapter 7

Resource Management in PWA

Overview

Upon completion of this chapter, the participant will be able to:

- Differentiate between SharePoint Tasks Lists, Resource Plans, and Schedules.
- Create a SharePoint Tasks List Assignment
- Define the purpose of a project team.
- Build a Resource Plan which allocates resources to a project during a specific timeframe.
- Edit a schedule and assign resources at the task level.
- Explain the purpose of Publishing.
- View cross-project assignments in the enterprise resource pool.

PWA Resource Management

An important advantage to working with resources in PWA is that it gives you three different options when accounting for resource needs: using SharePoint Tasks Lists, using Resource Plans, or using a Schedule. These three options allow you to create a to-do list type assignment, create a high-level time estimate, or create a detailed task assignment. All options have the capability of illustrating resource capacity in the Resource Center view in PWA.

Using SharePoint Tasks Lists

One of the quickest resource options is to create a to-do list type assignment. To do this, create a new SharePoint task and choose to assign it to a resource. Assign a resource to a task by typing the name in the Assigned To box.

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, click on the name of the SharePoint Task List project.
3. In the **Quick Launch** menu, click **Tasks**.

The screenshot shows a SharePoint Tasks page. At the top, there is a date range from December, 2013 to January, 2014, with a green button labeled "Today" positioned above the range. Below the date range, a message says "Add tasks with dates to the timeline". A green button with a plus sign and the text "new task or edit this list" is visible. The main area contains a table with columns: a checkmark icon, a checkbox, Task Name, Due Date, and Assigned To. There are three rows of data:

		Task Name	Due Date	Assigned To
✓	<input checked="" type="checkbox"/>	1	... August 26	
	<input type="checkbox"/>	2	... August 27	
	<input type="checkbox"/>	3	... August 28	<input type="checkbox"/> Amy Wachsricht

Figure 7-1 SharePoint Task List

4. On the Tasks page, click the hyperlink for **New Task**.

The screenshot shows the 'New SharePoint Task' dialog box. At the top, there are tabs for 'BROWSE' and 'EDIT'. The 'EDIT' tab is selected, showing various action icons: Save (purple floppy disk), Cancel (red X), Paste (yellow clipboard), Cut (scissors), Copy (blue clipboard), Attach File (document with paperclip), Spelling (ABC with checkmark), Commit, Clipboard, Actions, and Spelling. Below these are input fields for 'Task Name' (with an asterisk), 'Start Date' (with a calendar icon), 'Due Date' (with a calendar icon), and 'Assigned To' (with placeholder text 'Enter names or email addresses...'). At the bottom right are 'Save' and 'Cancel' buttons.

Figure 7-2 New SharePoint Task

5. In the **Task Name** box, enter the name for the task.
6. In the **Assigned To** box, enter the resource name and then click **Save**.

Typing the first few letters of an existing resource name should prompt a drop-down list of names that you can select from.



7. When finished with all tasks, in the **Quick Launch** menu, click **Home**.



Resource utilization can only be modeled for SharePoint task list assignments when a start date and due date are provided for the task.



Warning – The **Home** button in the **Quick Launch** returns you to the SharePoint Site home page. Instead, to access other pages, click **Project Details** to access the PWA **Quick Launch**.

Using Resource Plans

You should create a resource plan when you are able to estimate a high-level resource need, but are not able to plan a detailed list of tasks (and perhaps unable to determine who will be working on the project).

A **resource plan** is a way to plan for resource needs within a specified timeframe on a project, but does not require you to make actual task assignments. This allows you to do long range planning which can help an organization make hiring decisions before the project is fully planned. At any point in a project, you can switch to building a team of resources that will be assigned to tasks.

You can determine when the resource plan is followed by setting the resource utilization options in PWA on the **Resource Plan** page.

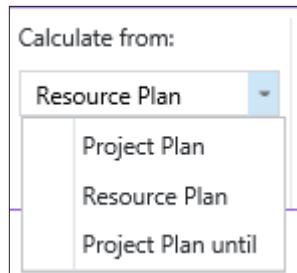


Figure 7-3 Resource Utilization Options on a Resource Plan

Resource Utilization options:

- **Project Plan** – follow the project plan for this schedule and ignore the resource plan.
- **Resource Plan** – follow the resource plan for this schedule and ignore the project plan.
- **Project Plan until** – follow the project plan until a specified point in time and then follow the resource plan. This is useful for long term planning where immediate details are not known.

Building a Team in the Resource Plan

The first part of a resource plan is building a team. You will be selecting resources that are available in the enterprise resource pool.

	Project Name ↑	Start
	_Infrastructure Deployment	... 7/25/201

Figure 7-4 Project Center Row Selector

1. In the **Projects** tab, **Navigate** group, click **Resource Plan**.
2. In the **Plan** tab, **Resources** group, click **Build Team**.

The screenshot shows the Microsoft Project ribbon with the 'Resource' tab selected. A 'Resource Plan' dialog box is open, displaying a grid of resources categorized by type (Cost or Work). To the right is a 'Resource Catalog' pane listing available resources like Analyst, Jesse Phillips, PMO, etc.

	Resource Name ↑	Type
<input type="checkbox"/>	▪ Type: Cost	Cost
<input type="checkbox"/>	□ Building and Facilities	Cost
<input checked="" type="checkbox"/>	□ Erik Vargas	Cost
<input type="checkbox"/>	□ Hardware	Cost
<input type="checkbox"/>	□ Juan Perez	Cost
<input type="checkbox"/>	□ Other Capital	Cost
<input checked="" type="checkbox"/>	□ Software	Cost
<input type="checkbox"/>	▪ Type: Work	Work
<input type="checkbox"/>	□ Aaron Painter	Work

Add >
 < Remove
 Replace >
 < Match
 Clear Match

Resource Name
<input type="checkbox"/> Analyst
<input type="checkbox"/> Jesse Phillips
<input type="checkbox"/> PMO
<input type="checkbox"/> Procurement
<input type="checkbox"/> Project Manager
<input type="checkbox"/> Sara Davis
<input type="checkbox"/> Test Guy
<input type="checkbox"/> Tester
<input type="checkbox"/> Tye Trepanier

Figure 7-5 Build Team Adding Resources to the Resource Plan

3. On the Build Team page, select the checkbox next to the desired resource(s) and click **Add**.
4. In the **Team** tab, **Team** group, click **Save and Close**.



A best practice is to use generic resource names for resource plans.

Creating and Publishing a Resource Plan

After a team is created for your resource plan, you need to select the desired options from the ribbon and enter the details for each resource.

	Resource Name ↑	Booking Type	Start	Finish	Tot	10/18/2013	10/19/2013	10

Figure 7-6 Resource Plan Ribbon and Grid

1. In the **Plan** tab, **Resource Utilization** group, choose the desired option.
2. In the **Plan** tab, **Date Range** group, click **Date Range** and choose the desired options.
3. In the **Plan** tab, **Display** group, choose the desired options for **Work Units** and **Timescale**.

You can change the options in **Work Units** on the **Resource Plan** page if you would like to modify how your resource needs are entered. The options available are hours, days or full-time equivalent.



4. Enter the values in the timescale grid.
5. In the **Plan** tab, **Plan** group, click **Save**.
6. When you are finished with all of your changes, in the **Plan** tab, **Plan** group, click **Publish** and then **Close**.

Warning – If the Publish button is not available, the specified project already has details in the schedule. You will need to publish the schedule first before publishing the resource plan.



Using the Schedule

SharePoint projects are simple to do lists. Schedules are detailed tasks with resource assignments. Normally, people transition from a SharePoint task list into a schedule when they are ready for detailed planning.

When you are ready for planning your project in detail, you will need to build a team of resources and assign resources to tasks in the schedule.



Both Enterprise projects and SharePoint Task List projects have dedicated SharePoint sites. The **SharePoint Task List** is a feature within the SharePoint site for both of these project types. We recommend you explain to your team when they should expect SharePoint task assignments and when they should expect project schedule task assignments.

Building a Team in the Schedule

You can build a team in PWA by selecting enterprise resources who may be given an assignment on your project or who may need access to project-specific information.

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, click on the name of the enterprise project.
3. In the **Quick Launch** menu for the selected project, click **Schedule**.
4. In the **Task** menu, in the **Project** group, click **Edit** and then click **In Browser**.

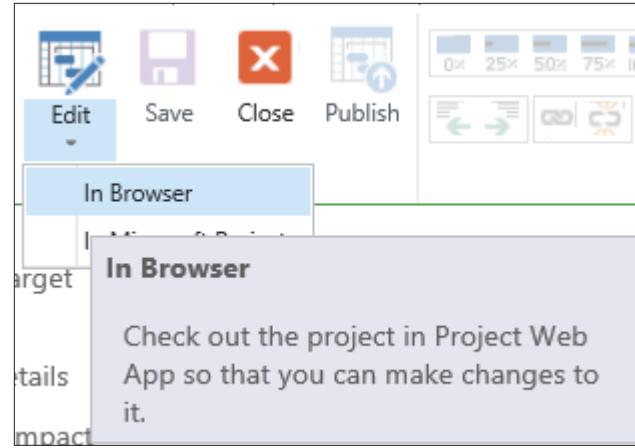


Figure 7-7 Editing a Schedule in PWA

5. In the **Project** tab, in the **Navigate** group, click **Build Team**.

	Resource Name ↑	Type
Type: Cost		
<input checked="" type="checkbox"/>	Buidling and Facilities	Cost
<input type="checkbox"/>	Erik Vargas	Cost
<input checked="" type="checkbox"/>	Hardware	Cost
<input type="checkbox"/>	Juan Perez	Cost
<input type="checkbox"/>	Other Capital	Cost
<input type="checkbox"/>	Software	Cost
Type: Work		
<input type="checkbox"/>	Aaron Painter	Work
<input checked="" type="checkbox"/>	Accountant	Work
<input type="checkbox"/>	Adam Barr	Work
<input checked="" type="checkbox"/>	Alex Darrow	Work
<input checked="" type="checkbox"/>	Alex Simmons	Work
<input type="checkbox"/>	Amy Alberts	Work

Add >
< Remove
Replace >
< Match
Clear Match

	Resource Name	Booking
<input type="checkbox"/>	Analyst	Commit
<input type="checkbox"/>	Jesse Phillips	Commit
<input type="checkbox"/>	PMO	Commit
<input type="checkbox"/>	Procurement	Commit
<input type="checkbox"/>	Project Manager	Commit
<input type="checkbox"/>	Sara Davis	Commit
<input type="checkbox"/>	Test Guy	Commit
<input type="checkbox"/>	Tester	Commit
<input type="checkbox"/>	Tye Trepanier	Commit

Figure 7-8 Build Team Adding Resources to the Schedule

6. On the **Build Team** page, select the checkbox next to the desired resource(s) and click **Add**.
7. In the **Team** tab, **Team** group, click **Save and Close**.



Adding resources to the team is a shortcut to give those team members access to the project's SharePoint Site which includes features such as: risks, issues, documents, team calendar, and more. These resources do not need to be assigned to a task to view the SharePoint Site.

This function is especially useful when projects are first initiated.

Assigning Resources with the Resource Names Column

To assign a resource to a task, select the desired resource(s) in the **Resource Names** column on the **PWA schedule** page. If the column is not available, you may be in a view that does not support the Resource Names column. There are numerous views that don't support the **Resource Names** column. However, the **Tasks Summary** view displays the **Resource Names** column by default. Be sure to select a task-based view and adjust the divider bar until you find the column.

1. In a checked out schedule, confirm that you are on the **Schedule** page in the **Quick Launch** menu.
2. Navigate to the task that you want to assign a resource.
3. Display the **Resource Names** column by scrolling the table or dragging the dividing bar in the view.
4. In the row of the desired task, **Resource Names** column, click the dropdown arrow and click the checkbox next to the desired resource(s) you want to assign to the task.

Mod	Task Name	Start	Finish	Resource Names
↳	↳ Infrastructure Deployment	7/25/2013	4/23/2014	
↳	↳ Scope	10/14/2013	10/21/2013	
↳	Determine project scope	10/14/2013	10/18/2013	
↳	Secure project sponsorshi	10/21/2013	10/21/2013	
↳	Define preliminary resour	10/14/2013	10/14/2013	
↳	Secure core resources	10/15/2013	10/15/2013	
↳	Scope complete	10/15/2013	10/15/2013	
↳	↳ Analysis	8/28/2013	11/19/2013	
↳	↳ Review Current Infrastru	10/16/2013	10/22/2013	
↳	Review hardware enviro	10/16/2013	10/22/2013	
↳	Review software enviro	10/16/2013	10/22/2013	
↳	Review communication	10/16/2013	10/22/2013	
↳	Review connectivity LAI	10/16/2013	10/22/2013	

The screenshot shows a Microsoft Project task list. The 'Resource Names' column is highlighted with a green border. A dropdown menu is open over the cell for the 'Scope' task, showing a list of resource names: 'Test Guy' (selected), 'Analyst', 'Jesse Phillips-Mead', 'PMO' (highlighted in green), 'Procurement Manager', 'Project Manager', 'Sara Davis', 'Test Guy' (selected again), 'Tester', and 'Tye Trepanier'. The 'PMO' item is highlighted in green.

Figure 7-9 Assigning Resources with the Resource Names Column

5. In the **Task** tab, **Project** group, click **Save**.
6. Click **Close** to check in the project.
7. In the **Close** dialog box, click **OK**.

Saving changes without publishing is a great way to build a plan and keep the schedule changes out of public view until the schedule is in a more final state.



Widening the **Resource Names** column might be needed if the dropdown arrow does not appear when you hover in the cell for the desired task.



Publishing Task Assignments

The publishing of a schedule does several things:

- It calculates the schedule in PWA which updates Start and Finish dates and redraw the Gantt Chart to display the impact of links.
- It makes schedule changes visible to others and finalizes task assignments so resources can see their tasks in their Timesheet or Tasks page.
- It fully synchronizes information in the database which could be useful if a saved change done in Project Pro is not showing up in PWA.



Publishing a schedule in PWA is slightly different than publishing in Project Pro. The main difference between publishing in PWA over publishing in Project Pro is that the schedule is manually calculated when you publish in PWA.

See what publishing a schedule in Project Pro does in Chapter 6, *Resource Management in Project Pro*.

To publish a schedule in PWA:

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, click on the name of the enterprise project.
3. In the **Quick Launch** menu for the selected project, click **Schedule**.
4. In the **Task** menu, in the **Project** group, click **Edit** and then click **In Browser**.
5. In the **Task** tab, **Project** group, click **Publish**.

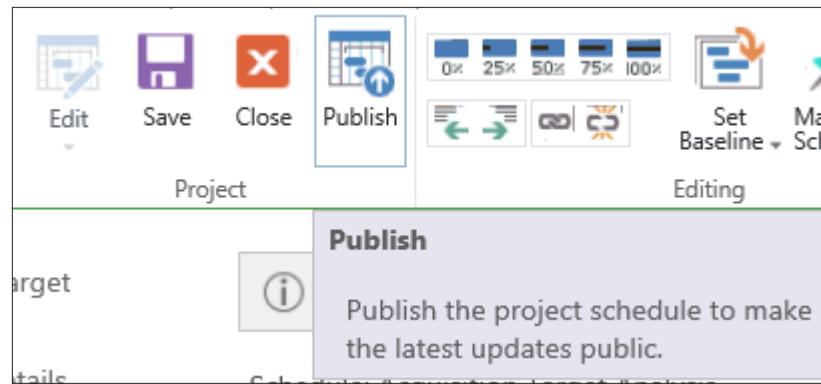


Figure 7-10 Publishing the Schedule in PWA

6. Click **Close** to check in the project.
7. In the **Close** dialog box, click **OK**.

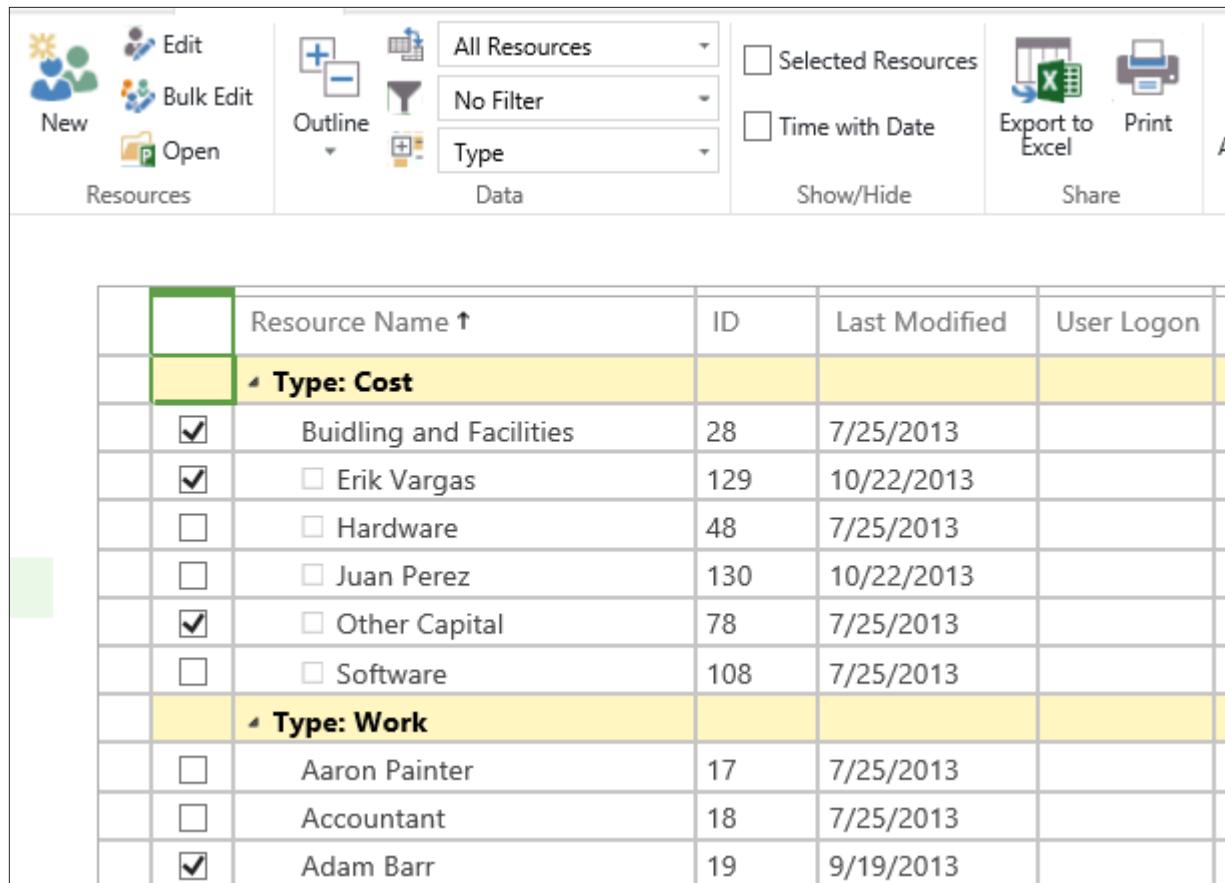
Analyzing Resource Assignments with the Resource Center

Following the creation of a SharePoint Task List assignment, a high-level Resource Plan, or a schedule-based task assignment, you may want to view a summary of all assignments for specific resources. That is the purpose of the **Resource Center** and it can provide a visual and detailed representation of these assignments.

Your ability to access the Resource Center is controlled by the PWA administrator.



1. In the **Quick Launch** menu, click **Resources**.
2. On the **Resource Center**, select the checkbox next to the desired resource(s).



The screenshot shows the ProjectWise Resource Center. At the top, there's a toolbar with icons for New, Edit, Bulk Edit, Open, and various filters like All Resources, No Filter, and Type. Below the toolbar is a table with columns: Resource Name, ID, Last Modified, and User Logon. The table is divided into sections by category: 'Type: Cost' and 'Type: Work'. In the 'Type: Cost' section, several resources are listed with checkboxes next to them. In the 'Type: Work' section, only one resource has a checked checkbox.

	Resource Name ↑	ID	Last Modified	User Logon
>Type: Cost				
<input checked="" type="checkbox"/>	Buidling and Facilities	28	7/25/2013	
<input checked="" type="checkbox"/>	Erik Vargas	129	10/22/2013	
<input type="checkbox"/>	Hardware	48	7/25/2013	
<input type="checkbox"/>	Juan Perez	130	10/22/2013	
<input checked="" type="checkbox"/>	Other Capital	78	7/25/2013	
<input type="checkbox"/>	Software	108	7/25/2013	
>Type: Work				
<input type="checkbox"/>	Aaron Painter	17	7/25/2013	
<input type="checkbox"/>	Accountant	18	7/25/2013	
<input checked="" type="checkbox"/>	Adam Barr	19	9/19/2013	

Figure 7-11 Selecting Resources in the Resource Center

3. In the **Resources** tab, in the **Navigate** group, click **Resource Availability**.
4. In the **Availability** tab, in the **Navigate** group, click **Resource Center** to return to the previous page or click **Resource Assignments** to drill into the details of task assignments for the selected resources.



No projects are checked out when viewing assignments in the Resource Center; therefore you do not need to check in anything.



The most popular reason why assignments are not visible on the Resource Availability page is because either the Resource Plan or Schedule has yet to be published.

Key Points to Remember

- PWA offers three different solutions for managing resources: a SharePoint Tasks list, a Resource Plan, and a Schedule with Task Assignments.
- SharePoint Tasks lists are useful as to-do list for small projects.
- Resource Plans are useful for planning high-level resource needs and typically contain generic resources.
- Schedules contain a detailed list of tasks with resource assignments.
- The Resource Center can be used to display assignments and availability across multiple types of projects.
- Resource Plan utilization must be properly set to illustrate allocation using the Resource Center.
- Publishing is required for the Resource Plan or the Schedule to illustrate allocation using the Resource Center.



A D V I S I C O N®

Chapter 8

Working with Views in PWA and Project Pro

Overview

Upon completion of this chapter, the participant will be able to:

- Discuss the similarities and differences between views in PWA and Project Pro.
- Apply enterprise views in PWA and Project Pro.
- Use the PWA display options to tailor multiple types of views.
- Use Project Pro quick click options and dual pane options to tailor multiple types of views.
- Configure the appropriate level of detail in a timescale portion of a view.
- Differentiate between and apply sorting, grouping and filtering.
- Show and hide columns of information to personalize a view.
- Explain the advantage of changing tables within a view in Project Pro.
- Properly format global text and bar options in Project Pro.
- List limitations to personalizing enterprise views and enterprise fields in PWA and Project Pro.

Working with Views in PWA and Project Pro

Both PWA and Project Pro have numerous views that you can select from and customize to display the information you need. Since the information you are viewing is coming from Project Server or Project Online, you are working with real-time, up-to-date information. Many organizations use views as a reporting mechanism.

Working with Display Options in PWA

On many pages in PWA (such as the Project Center page and the Project Details Schedule page) there are some common display options for showing desired information when viewing the timescale (located on the right side of the display). In this topic, we will differentiate between the different zoom options and their purpose in controlling the display. These options are available even if you change the view for a specific page.

There are three different options available:

- **Zoom In** – shows more detail on the timescale. For example, moving from weeks to days. This option may be clicked several times to get the level of detail desired.
- **Zoom Out** – shows less detail on the timescale. For example, moving from weeks to months. This option may be clicked several times to get the level of detail desired.
- **Scroll to Task/Project** – displays the Gantt bar for the selected row (task or project).

To Change the Display Options:

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, **Zoom** group, click **Zoom In** or **Zoom Out** to adjust the timescale level of detail.

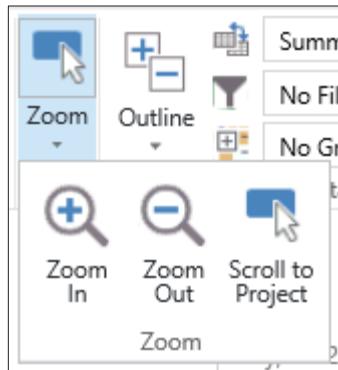


Figure 8-1 Zoom options on Project Center Page

3. On the **Project Center** page, click the row selector for any row and in the **Zoom** group, click **Scroll to Project** to bring the Gantt bar into view in the timescale.

Working with Show/Hide Options

On various PWA pages, such as the Project Center page and the My Tasks page, there are show/hide options. The choices within the Show/Hide group vary based on the purpose of the page. Using these options gives flexibility in quickly adding or removing information from the display.



Depending on the amount of information to show or hide, you may have to wait for the page to refresh. You will see “Loading...” as an indicator that you will need to wait.

To Change the Show/Hide Options:

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, **Show/Hide** group, check the check box **Time with Date**. Notice in the Start and Finish columns, the time is now displayed.

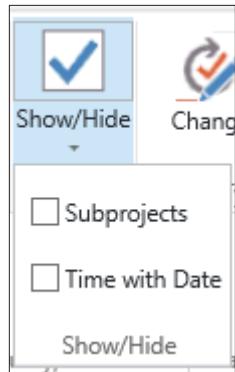


Figure 8-2 Show Hide Options

3. Uncheck the check box **Time with Date** and notice the time is now hidden.

Each checkbox (such as **Time and Date**, or **Subprojects**) is an independent **Show/Hide** option.



Working with Data Options

Data options grant the ability to control the view of a particular PWA page and how the information in that view is organized or defined. Refer to the following for examples:

- **Outline** – use this to change the level of outline details displayed such as summary and subtasks.
- **View** – both default views and those defined by the organization are available in this dropdown list. A view is simply a name given to a visual collection of information which may include things such as columns/fields, formatting, and a timescale.

- **Filter** – hides or shows rows based on a condition.
- **Group** – organizes/categorizes information by a field.

To change the data options:

1. In the **Quick Launch** menu, click **Projects**.
2. On the **Project Center** page, **Data** group, **Group By:** list, click **Owner**.
Notice the projects are grouped by each owner.

Working with Views in PWA

A **view** is a set of fields, filters, groups, data sort, etc., that PWA uses when displaying project or resource information. Views represent information in the form of live and interactive reports when accessing project or resource data. The Project Server database contains many default views that allow project stakeholders to analyze information in a variety of ways.

Views also enable project managers to communicate critical information about their projects to other individuals and groups in the organization.

The default views can be accessed based on the permissions a project stakeholder is assigned in PWA.

Overview of View Types

The views in PWA are categorized based on the type of information they contain and each view serves a specific purpose. For example, some views enable team members to only see information about their tasks, while other views enable project managers to keep track of their projects. Additional views allow resource managers to determine resource availability and evaluate assignments across projects.

The default categories of views that contain project and resource data which are relevant in this book are: Project, Project Center, Resource Assignments, Resource Center, My Work, Resource Plans, Team Tasks, Team Builder and Timesheet.

Experienced users of PWA often call the Project category Project Details to further differentiate it from the Project Center category. The Project Center category only has a summary line of information for each project.



Project Center Views

The **Project Center** provides a convenient way for project stakeholders to view summary information about projects that have been published to the Project Server database. In Project terms, it displays the **Project Summary Task** (row 0) for each project. You can see summary information about multiple projects and also review detailed information about specific projects.

The Project Center page displays indicators about project-related information. For example, document or risk indicators are displayed when documents or risks are linked to a project. The view can also be used to filter, group and sort projects. Project Center contains many default views which can be modified. New, custom views can be created.

To apply a view in the Project Center:

1. On the **Quick Launch** menu, click **Projects**.
2. In the **Projects** tab, **Data** group, click the **View** dropdown arrow and select the desired view.

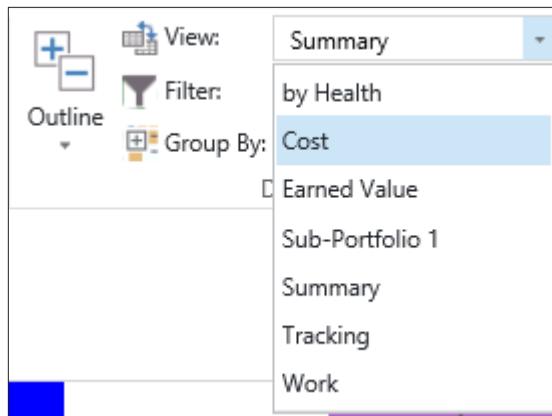


Figure 8-3 Data Group in Project Center Ribbon



The chart portion of the Gantt chart view displays each project as a summary Gantt bar. Different fields are displayed in the sheet portion of the view, depending on the view that you choose.

Project Views

PWA provides a complete overview of all the projects in the Project Center view and also allows you to drill down to individual projects using the Project views. The Project views display detailed task level information for individual projects. This category contains the maximum number of views that provide cost, tracking, summary, work, earned value and leveling information for each task within a project.



It is important to note that views in Project Pro are not directly mapped to the Project Views in PWA. For example, PWA Project Views do not have the Calendar or the Network Diagram views.

The list below provides details of views in the Project Detail Pages – Schedule:

Table 8.1 Views in the Project Detail Pages – Schedule

View Name	List of Fields Included
Assignments Cost	Task Name, Resource Name, Cost, Baseline Cost, Cost Variance, Actual Cost, Remaining Cost, Start, Finish
Assignments Detail	Task Name, Resource Name, Delay, Work, Start, Finish
Assignments Earned Value	Task Name, Resource Name, BCWS, BCWP, ACWP, SV, CV, Cost, Baseline Cost, VAC, Start, Finish
Assignments Summary	Task Name, Resource Name, Assignment Owner, Work, Start, Finish, % Work Complete
Assignments Tracking	Task Name, Resource Name, Assignment Owner, Start, Finish, Actual Start, Actual Finish, Baseline Start, Baseline Finish, % Work Complete, Actual Cost, Actual Work
Assignments Work	Task Name, Resource Name, Work, Baseline Work, Work Variance, Actual Work, Remaining Work, % Work Complete, Start, Finish
Resources Cost	Unique ID, Resource Name, Cost, Baseline Cost, Cost Variance, Actual Cost, Remaining Cost, Start, Finish
Resources Earned Value	Unique ID, Resource Name, BCWS, BCWP, ACWP, SV, CV, Cost, Baseline Cost, VAC, Start, Finish

Table 8.1 Views in the Project Detail Pages – Schedule

View Name	List of Fields Included
Resources Summary	Unique ID, Resource Name, Group, Max Units, Peak, Standard Rate, Overtime Rate, Cost, Work, Start, Finish
Resources Work	Unique ID, Resource Name, % Work Complete, Work, Overtime Work, Baseline Work, Work Variance, Actual Work, Remaining Work, Start, Finish
Select Tasks for Timeline	ID, Task Name, Start, Finish
Tasks Cost	ID, Mode, Task Name, Fixed Cost, Fixed Cost Accrual, Cost, Baseline Cost, Cost Variance, Actual Cost, Remaining Cost, Start, Finish, Resource Names
Tasks Detail	ID, Mode, Task Name, Leveling Delay, Duration, Start, Finish, Resource Names
Tasks Earned Value	ID, Mode, Task Name, BCWS, BCWP, ACWP, SV, CV, Cost, Baseline Cost, VAC, Start, Finish, Resource Names
Tasks Leveling	ID, Mode, Task Name, Leveling Delay, Duration, Start, Finish, Preleveled Start, Preleveled Finish, Early Start, Resource Names

Table 8.1 Views in the Project Detail Pages – Schedule

View Name	List of Fields Included
Tasks Schedule	ID, Mode, Task Name, Start, Finish, Late Start, Late Finish, Free Slack, Total Slack, Resource Names
Tasks Summary	ID, Mode, Task Name, Duration, Start, Finish, % Complete, Work, Resource Names
Tasks Top-Level	ID, Mode, Task Name, Duration, Start, Finish, % Complete, Work, Resource Names
Tasks Tracking	ID, Mode, Task Name, Start, Finish, Actual Start, Actual Finish, Baseline Start, Baseline Finish, % Complete, Duration, Actual Duration, Remaining Duration, Actual Cost, Actual Work, Resource Names
Tasks Work	ID, Mode, Task Name, Work, Baseline Work, Work Variance, Actual Work, Remaining Work, % Work Complete, Start, Finish, Resource Names

To change views in the Project Detail Pages – Schedule page:

1. In the **Quick Launch** menu, click **Projects**.
2. Click on the Project Name.
3. On the **Schedule** page, in the **Task** tab, **Data** group, **View** dropdown, select the desired view.

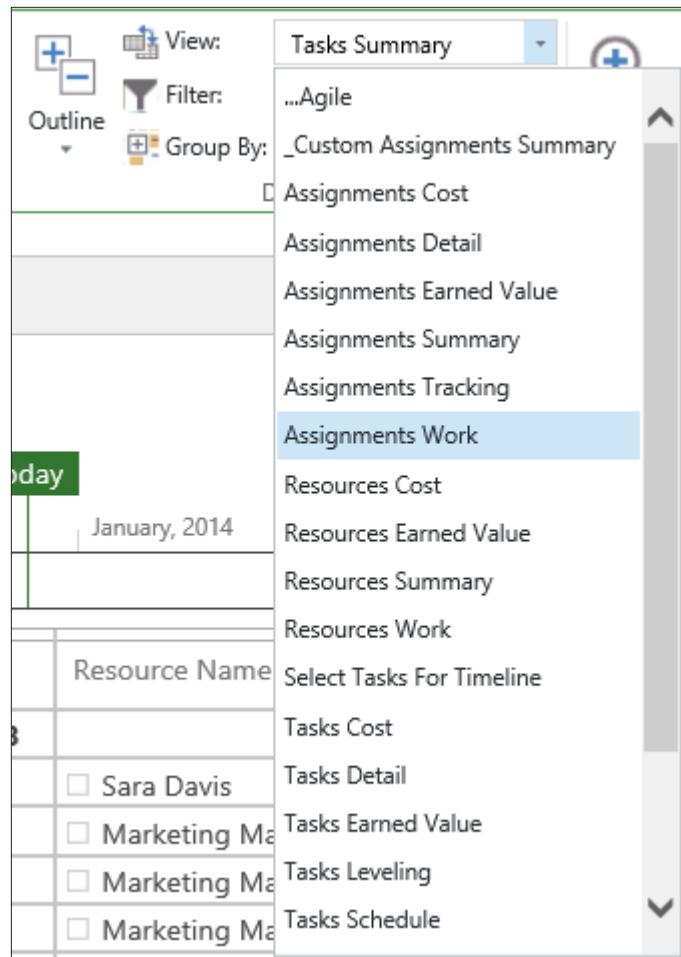


Figure 8-4 Data Group in Project Details Ribbon

Resource Assignment Views

Resource Assignment views display information about the projects and assignment progress associated with each resource. These views are very useful for resource managers. Resource Assignment views allow resource managers to see the progress resources have reported and plan for future assignments based on currently assigned work.

The Resource Assignment views give a list of tasks grouped by resource name and then by project name. It resembles the Resource Usage view in Project Pro. You can also set a date range to view the assignments and display data in the form of a Gantt chart or Timephased format.

To view resource information in the Resource Assignments view:

1. In the **Quick Launch** menu, click **Resources**.
2. Select the checkbox for the desired resources.
3. In the **Resource** tab, **Navigate** group, click **Resource Assignments**.



Figure 8-5 Navigate Group in Resource Center Ribbon

Resource Center Views

The **Resource Center** provides summary information of all resources that are part of the Enterprise Resource Pool and are published to the Project Server database. A list of useful default views is available to support resource management in Project Server.

In the **Resources** tab, **Data** group, there is a dropdown menu next to **View**: that contain these popular views:

- **All Resources** – includes all resources grouped by resource type (i.e., work, cost and material). In addition, the view also displays a large set of useful resource information.
- **Cost Resources** – displays only cost resources and their associated resource information.
- **Material Resources** – displays only material resources and their associated resource information.

- **Resources by Team** – displays resource information for resources associated with team assignment pools.
- **Work Resources** – displays only work resources and their associated resource information.

To apply a view in the Resource Center:

1. In the **Quick Launch** menu, click **Resources**.
2. In the **Resources** tab, **Data** group, click the dropdown arrow next to **View:** and select the desired view.

Task Views

Team members can gain insight into the plan for the projects they are working on and details about the tasks they have been assigned by using the views available when using the Tasks page.

The Tasks page opens My Assignments view by default. My Assignments view allows team members to fill in and update progress information for each task. You can change the layout of this view to **Gantt Chart**, **Time-phased Data** or **Sheet** format.



A different view is available when a team member clicks on a task. That view is called **Details**.

To apply the My Assignments view:

1. In the **Quick Launch** menu, click **Tasks**.
2. By default, the **My Assignments** view will open. To change the view, in the **Task** tab, **Data** group, click the dropdown arrow next to **View:** and choose the desired view.



By default, there will be only one view listed in the dropdown menu of the Tasks page unless new custom views have been created.

Resource Plan View

Using the **Resource Plan** view, project managers can create resource plans for their projects. Using resource plans, a high level resource requirement for a project can be prepared during the project initiation phase. It is not required to assign resources to any task in the Resource Plan view.

The Resource Plan view is helpful when you need to advise the project managers, resource managers and executives of upcoming work, but you do not know the specific tasks or resources that will be assigned to the project plan. This view shows a grid of resource names and timephased work where entries can be made to block a resource for corresponding hours allocated.

To access a Resource Plan view:

1. In the **Quick Launch** menu, click **Projects**.
2. On the Project Center page, click the row selector next to the desired project.



Figure 8-6 Project Center Row Selector

3. In the **Projects** tab, **Navigate** group, click **Resource Plan**.

To change the view, in the **Plan** tab, **Display** group, click the dropdown arrow next to **View:** and choose the desired view.

By default, there will be only one view listed in the dropdown menu of the Resource Plan page unless new custom views have been created.



Team Tasks View

Team members can use the **Team Tasks** view to review the tasks to which their team is assigned as a resource. An example of teams are: Team Marketing, and Team IT. The project manager can assign a task to team “Marketing,” and the individuals who belong to that team can pick from the list of team tasks and assign themselves that task.



The Team Task view will only show tasks if the Team Feature has been configured by the Project administrator.

To access the Team Tasks view:

1. In the **Quick Launch** menu, click **Tasks**.
2. On the **Task** page, in the **Tasks** tab, **Tasks** group, click the **Add Row** dropdown arrow and choose **Add Team Tasks**.
3. On the **Team Task** page, in the **Tasks** tab, **Data** group, click the dropdown arrow next to **View:** and choose the desired view.



By default, there will be only one view listed in the dropdown menu of the Team Task page unless new custom views have been created.

Team Builder View

The **Team Builder** view provides resource managers and project managers access to the preferred list of resources to be assigned to a project or used in the resource plan. The default list of views available for the Team Builder is similar to the view list available in the Resource Center.

To access a Team Builder view:

1. In the **Quick Launch** menu, click **Projects**.
2. Select a project for which you would like to build a team of resources.

3. In the **Projects** tab, **Navigate** group, click **Build Team**.
4. On the **Build Team** page, **Team** tab, **Data** group, click the dropdown arrow next to **View:** and select the desired view.

Timesheet View

The **Timesheet** view allows team members to fill in timesheet information for project and non-project work. The Timesheet view is only available to team members when the project administrator configures the timesheet periods.

To access the Timesheet view:

1. In the **Quick Launch** menu, click **Timesheets**.
2. To change the view, in the **Options** tab, **Data** group, click the dropdown arrow next to **View:** and choose the desired view.

Views can be customized as needed. Typically only the administrator has the ability to customize views. In contrast to Project Pro, the ability to insert fields of information in PWA is restricted to a predefined list of fields for each view. This provides additional security in PWA and prevents individuals from seeing confidential information.



Working with Groups and Filters

The Filter and Group options help you to focus on specific aspects of projects, tasks and resources by revealing only desired data, instead of all the project data. This surfaces the necessary information for quick analysis and management. Examples include displaying projects that are at 100% complete or grouping resources by similar skillset.

Overview of Grouping and Filtering Options

Grouping allows the user to display data in associations of a common trait. For example, a user can group tasks by Critical and Non-Critical status, or % Complete status, or group tasks by assigned resource.

Applying a filter allows you to specify criteria that will determine what projects, resources or tasks should be displayed in a given view. Any information that does not correspond to the criteria will not be displayed.

To apply a filter to a view:

1. Navigate to the desired view.
2. Using the appropriate tab (e.g., **Projects or Resources**), **Data** group, click the dropdown arrow next to **Filter:** and choose the desired filter.

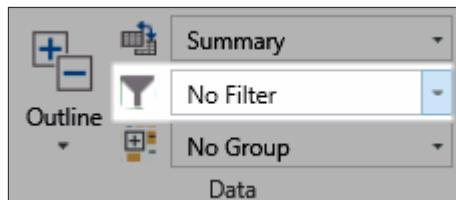


Figure 8-7 Filters and Groups

To apply an auto filter option:

1. Hover your mouse over the desired column name and click the drop-down arrow.
2. Choose from the predefined list of auto-filters.

PWA also supports auto-filter, which is similar to a regular filter, but can be applied directly using the column headings without invoking the options in the ribbon.

By applying a group to a view in PWA, all similar information will be arranged by some common characteristic.

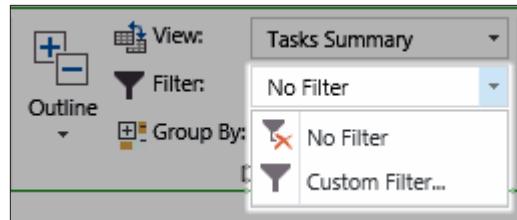


Figure 8-8 Filters and Groups

To apply a group to a view:

1. Navigate to the desired view.
2. Using the appropriate tab (e.g., **Projects** or **Resources**), **Data** group, click the dropdown arrow next to **Group by:** and choose the desired field to group the view.

Clearing filters and groups will be discussed in a later topic. Filters and groups are maintained until you change them even as you navigate through other PWA pages.



Creating Custom Groups and Filters

PWA offers a variety of default auto-filter and group options that help you view specific information for projects, resources and tasks. If the pre-defined filters and groups do not meet your needs, custom filters and groups can be applied.

To create a custom filter:

1. Navigate to the desired view.
2. Using the appropriate tab (e.g., **Projects** or **Resources**), **Data** group, click the dropdown arrow next to **Filter:** and choose **Custom Filter**.

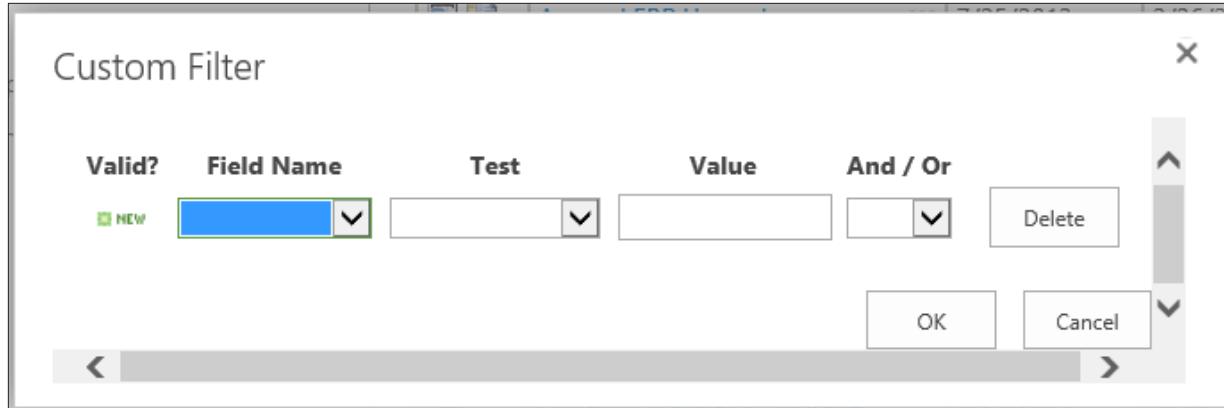


Figure 8-9 Custom Filter

3. In the **Custom Filter** dialog box, select a field in the **Field Name** list and a test in the **Test** list,
4. Type a value to test for in the **Value** box. You can set a range of values by typing two values separated by a comma (,) in the Value box.
5. If the filter contains more than one criterion row, select an operator in the And/Or column to start a new row.
6. Click **OK**.



Once the filter criteria are validated, a checkmark will appear in the **Valid?** column.

To create a custom group:

1. Navigate to the desired view.
2. Using the appropriate tab (e.g., **Projects** or **Resources**), **Data** group, click the dropdown arrow next to **Group by:** and choose **Custom Group**.
3. In the **Group Fields** dialog box, in the **Group By** dropdown list select the desired field.
4. To enable multiple levels of grouping, use the **Then By** dropdown lists and select the desired field for a second or third level grouping.
5. Click **OK**.

Clearing Custom Groups and Filters

Once a custom filter or a custom group option has been applied to a view, it is very easy to clear these options and reset the view.

To clear a custom filter:

1. Navigate to the desired view.
2. Using the appropriate tab (e.g., **Projects** or **Resources**), **Data** group, click the dropdown arrow next to **Filter:** and choose **No Filter**.

To clear an auto filter:

1. Hover your mouse over the desired column name.
2. Click the dropdown arrow and choose **Clear Filter**.

To clear a custom group:

1. Navigate to the desired view.
2. Using the appropriate tab (e.g., **Projects** or **Resources**), **Data** group, click the dropdown arrow next to **Group By:** and choose **No Group**.

Warning – Any view, filter, grouping, or display options that were implemented by the user to access a view are automatically saved in PWA for that specific user. You should not expect other users to have the exact same configuration of a view that you have.



Sorting in a PWA View

PWA initially arranges rows of information according to ascending ID number. The ID number is usually located in the far left column of the displayed view. If the ID column is not visible, it is most likely hidden. If available, insert the ID column to make it visible again.



As a reminder, the administrator restricts the columns in PWA to a predefined list for each view.

To make it easier to work with your projects, tasks, and resources, you can temporarily (or permanently) rearrange them. For example, you can rearrange the order of tasks based on a column such as, start date, finish date, priority, cost, or ID. You can also sort resources. By default, resources are arranged in ascending order based on the ID number, but you can sort resources by cost or name.

To sort activities:

1. Click the dropdown arrow on the field column heading.
2. Select the desired sorting option from the list.



You can click the name of a column heading to quickly sort by that column. It will switch from ascending to descending each time you click on the heading.



A predefined sort can be achieved through a custom view created by your administrator.

Working with Quick Click Options in Project Pro

Project Pro has a number of similarities with PWA when it comes to manipulating views. Throughout the remainder of this module, we will be focusing on the techniques to use those options in Project Pro. We will also cover additional features that are available to support the advanced scheduler.

Quick click options in Project Pro look the same as checkboxes in PWA. Project Pro provides quick clicks to apply a feature immediately instead of proceeding through a list of steps in a dialog box or wizard which would take more time to apply.

To use a quick click option:

1. Navigate to Project Professional
2. In the **File** tab, click **Open**.
3. Click the desired project and click **Open**.
4. In the **Format** tab, in the **Bar Styles** group or the **Show/Hide** group, click the desired checkbox.

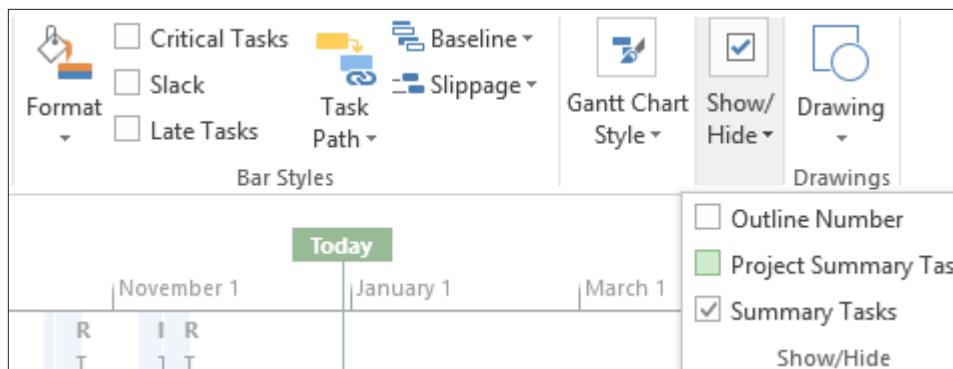


Figure 8-10 Format tab Quick Click Options in Project Pro

Working with Timescale Options in Project Pro

Numerous views in Project Pro have a timescale portion on the right side of the screen. Gantt Chart and Resource Usage view are examples. For these views, you can tailor the timescale to show the level of detail you desire. Project Pro has the advantage of offering more timescale and zooming shortcuts than PWA.

To use a timescale option:

1. In the **Task** tab, in the **View** group, select the desired view from the **Gantt Chart** dropdown list.
2. In the **View** tab, in the **Zoom** group use one of the following shortcuts:
 - In the **Timescale**: dropdown list, select an option from the list to quickly zoom to a week view, month view, etc.
 - In the **Zoom** dropdown list, choose **Zoom In**, **Zoom Out** or **Custom Zoom** to quickly adjust the timescale incrementally.
 - Click **Entire Project** to zoom the information so it fits within the available timescale screen spaces.
 - Highlight a group of tasks and click **Selected Tasks** to zoom the information for those tasks only so the selected group of tasks fits within the available timescale screen space.

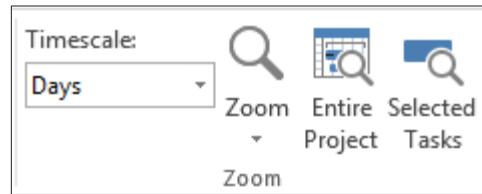


Figure 8-11 Zoom Group in View Tab of Ribbon



Zoom In and **Zoom Out** shortcuts are also available in the Status Bar in the lower right corner of your screen.

In Gantt Chart view, zooming **Entire Project** is a useful option to apply just before printing.

Working with Views in Project Pro

A view in Project Pro consists of many elements which can be tailored in a lot more detail in Project Pro than in PWA. In this section and the remaining sections of this module, we will be discussing changing views and changing the elements within those views based on personal preferences.

Enterprise views and related elements are configured by your administrator. Normally an enterprise view has a prefix of **Enterprise** or something unique to your organization such as company initials. You will receive an error if you attempt to change one of these items. Please consult with your administrator for information about identifying enterprise views.



Exploring Tables

Instead of Project giving you a long list of columns that you need to scroll through in views, you are presented with a subset of those columns. These columns have been grouped by subject area into what Project calls **Tables**.

You can show/hide columns within a table or you can change to another table. The available options for tables change based on the type of view you are in (Task view, Resource view, or Assignment view).

Show/Hiding Columns

Project is a database application. Unlike Excel, you only have the option to show or hide columns but never add or permanently delete a column. That is because each column in Project is tied to a field in the SQL server database and the number of fields have been predetermined for you.

Some of the columns available to you are set aside for custom information (e.g. Text 1- Text 10) that you can use as needed if Project does not already have a column for your desired purpose. Refer to *Advanced Scheduling with Microsoft Project: Power Scheduling from Project MVPs* for information about customizing Project Pro columns.



Your administrator can create new enterprise columns if required.

As a project manager, you can only edit columns provided by Microsoft or your administrator for that purpose. Recommendations on what columns to use for your projects would be best obtained through your organization as each environment is uniquely configured.

To hide a column:

1. Right-click the column heading and click **Hide Column**.

To show a column:

1. Right-click the column heading and click **Insert Column**.
2. Click the desired column name.



You can type the first few letters of the column name to quickly filter the list.

You can also use the shortcut **Add New Column** on the far right side of the table.

Changing Tables

Tables automatically change based on the view you are in. You have the option to switch to another table without changing views.

To change tables:

1. In the **View** tab, in the **Data** group, in the **Tables** dropdown, click the desired table.

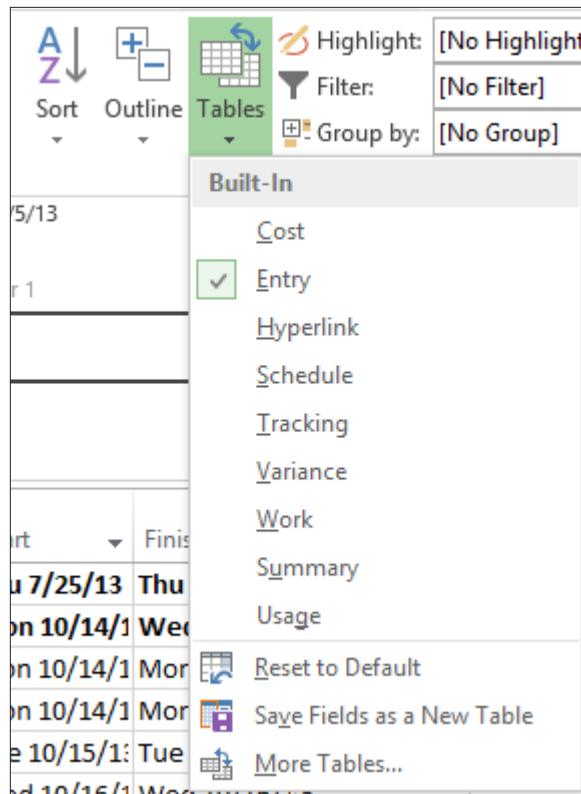


Figure 8-12 Changing Tables Using the Data Group in Project Pro

Warning – If you save your schedule with an alternate table applied to a view, this will become the new default for that view. It may be helpful to jot down the original name of the table associated with that view before you make changes.



Changing Views

One of the valuable features in Project Pro is the ability to analyze information quickly through the use of views. Views are configured to show one of these groupings of information in the database:

- Task only information
- Resource only information
- Combination task and resource information typically illustrating assignments

To change views:

1. In the **Task** tab, in the **View** group, in the **Gantt Chart** dropdown, click the desired view.

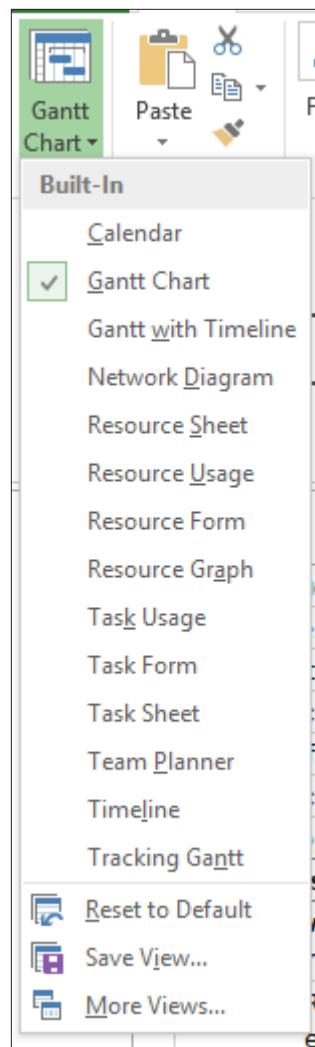


Figure 8-13 Changing Views Using the Ribbon in Project Pro

Right-clicking on the name of the view in the **View Bar** is another way to quickly change views.



Using Dual Pane Views

With all the fields of information available in Project, scrolling left and right is not always the most efficient approach to display hidden columns or information available from the Gantt bars. Instead, you should use a dual pane view to show information for the selected task or resource in the upper pane and additional, related information in the lower pane. For example, on a selected task, you might want to see the Task Start and Finish date in the upper pane, but in the lower pane show the Predecessors and Successors.

Information in the lower pane is dependent on what is selected in the upper pane. You can only see details for one item at a time in the lower pane.



To turn on a dual pane view:

1. In the **View** tab, in the **Split View** group, check the **Details** checkbox.
2. In the **Details** dropdown list, choose the desired lower pane view.

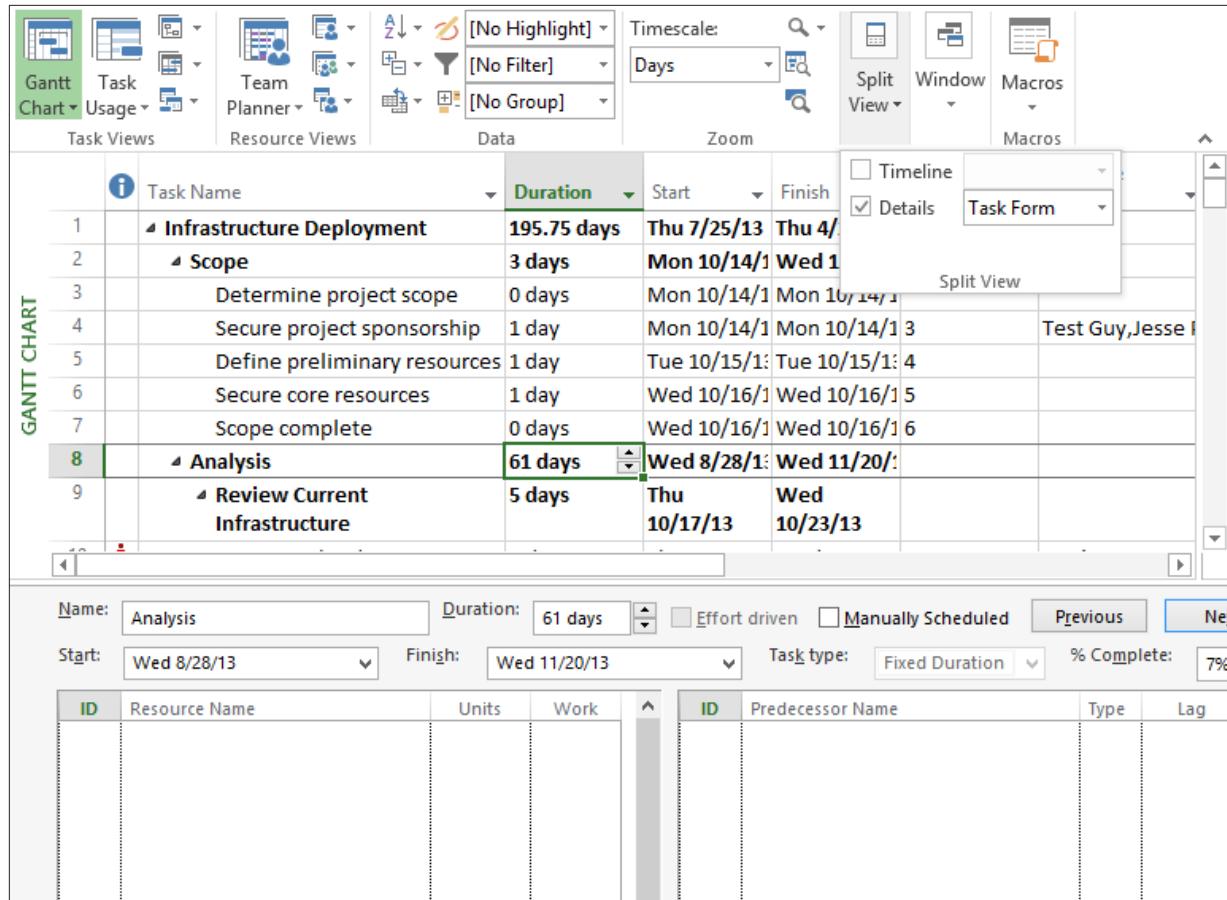


Figure 8-14 Dual Pane View in Project Pro

Grouping and Filtering in Project Pro

As a reminder, grouping allows the user to display data in associations of a common trait. For example, a user can group tasks by Critical and Non-Critical status, or % Complete status, or group tasks by assigned resource.

Applying a filter allows you to specify criteria that will determine what projects, resources or tasks should be displayed in a given view. Any information that does not correspond to the criteria will not be displayed. Project Pro provides the additional option of a highlight filter which shows all information but highlights the tasks which meet that condition.

Project Pro supports auto-filtering which is turned on by default. There are specific unique filters available through this feature that can be useful to the scheduler or project manager. The available unique filters vary by column. An example from the Start column is you can show tasks starting next week. An example from the Duration column is you can show tasks longer than 1 week.

To apply a filter, highlight filter, or group from the Ribbon:

1. In the **View** tab, in the **Data** group, choose the appropriate option from the **Highlight:**, **Filter:** or **Group by:** dropdown lists.
2. Choose **[No Highlight]**, **[No Filter]**, or **[No Group]** to turn off these options.

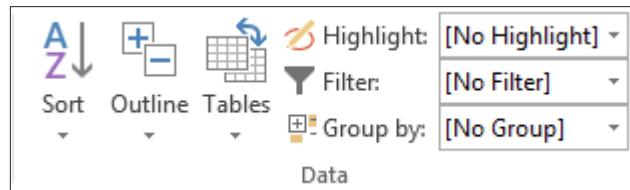


Figure 8-15 Data Group in Project Pro

To apply an auto filter from the table:

1. Click the dropdown arrow next to a column heading name and do one of the following:
 - Filter items by checking or unchecking boxes next to the information currently in the column.
 - Click **Filters** in the menu to display the submenu of pre-defined filters. Click the desired option.
2. Click **Clear Filter** to cancel the filter.

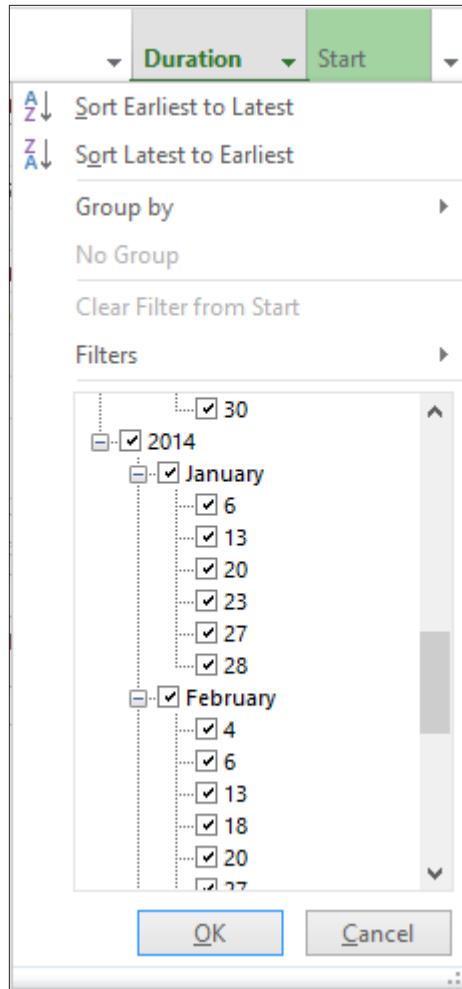


Figure 8-16 Autofiltering and Using Pre-Defined Filters in a Column in Project Pro



Using columns to filter information often filters other columns you didn't intend. As a shortcut, press F3 to globally cancel all filtering and return to showing all information.

Sorting in a Project Pro View

You can sort information in a table in any view in Project Pro.

To sort information:

1. Click the dropdown arrow next to a column heading name and choose the appropriate sort option: **Sort Ascending** or **Sort Descending**.
2. To return to the default state of the view, sort by ID number. In the **View** tab, in the **Data** group, in the **Sort** dropdown list, click **by ID**.

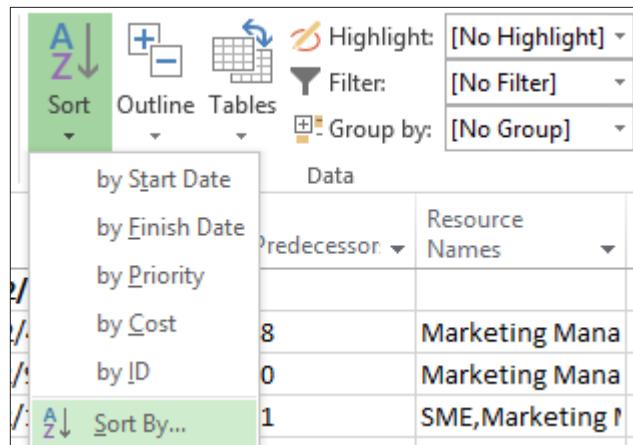


Figure 8-17 Sorting Information Using the Data Group in Project Pro

Formatting Views in Project Pro

Project Pro has Quick Click options to format information (discussed earlier in *Working with Quick Click Options in Project Pro* on page 148). However, you may discover that you need to tailor the formatting in a way not available through a Quick Click. At Advisicon, we recommend two separate formatting approaches: global text formatting and global bar formatting.

To apply global text formatting:

1. In the **Task** tab, in the **View** group, click **Gantt Chart**.
2. In the **Format** tab, in the **Format** group, click **Text Styles**.
3. In the **Text Styles** dialog box, in the **Item to Change** dropdown list, click the desired text type.
4. Make the desired font modification and click **OK** to apply.
5. Repeat as needed for other types of text you want to globally modify.

To apply global bar formatting:

1. In the **Task** tab, in the **View** group, click **Gantt Chart**.
2. In the **Format** tab, in the **Bar Styles** group, click the **Format** dropdown and then click **Bar Styles**.
3. In the **Bar Styles** dialog box, select the desired bar in the upper pane and using the lower pane, click either the **Text** or **Bars** tab and make the desired changes.
4. Repeat for each bar you wish to modify and then click **OK** to apply.



Warning – Using **Format Bar** or using any of the **Font** formatting options on the **Task** tab of the Ribbon instead of the methods presented above generates an exception to the global style you have previously applied. These items will never respond to future style changes. The only correction that can be applied is to delete these tasks and recreate them.

Key Points to Remember

- PWA display options are maintained automatically by each user on each view even after navigating away.
- PWA columns that can be displayed are controlled by the administrator.
- Click on a column heading to quickly sort ascending or descending in a PWA view.
- Filtering in PWA hides information and grouping organizes information by a field.
- The autofilter dropdown on column headings in Project Pro provide fast methods to sort, group, filter and use built-in custom filters.
- F3 is a shortcut to remove all filters and show all information.
- Project Pro offers highlight filtering to mark items that meet a specific condition while still showing all items in the list.
- Use zooming options to adjust the timescale to the desired level of detail you need.
- A table is a component of a view in Project Pro and it consists of a subset of the available columns offered in Project Server.
- Enterprise views and enterprise fields are controlled by the administrator in Project Pro.
- In Project Pro, apply global text and global bar formatting to save time and to quickly customize the schedule.



Chapter 9

Working with Project Sites

Overview

Upon completion of this chapter, the participant will be able to:

- Learn how to use content management features, such as check in and check out.
- How to monitor project risks and issues with Project Site features.
- Create Deliverables linked to tasks.
- Learn the collaboration features of Project Sites.

Managing Documents

It is important for the project team to have access to the latest project documents. Using Project Sites, project team members can update, save, store and share documents online. Document management is the key to safeguarding against project team members duplicating work. This ensures that projects are completed quickly and efficiently. SharePoint automatically adds a date and time stamp for document uploading and editing, making it easier to track document changes.

Creating Document Libraries

Every project site contains a default document library called Project Documents. You can upload all project specific documents to this library. If needed, additional libraries can also be created to better organize documents. For example, if documents associated with your project are department specific, you can create one library for each department. A document library can contain multiple folders and documents, establishing easier navigation for grouping and locating documents.

Also on the PWA home page is a link for Shared Documents available where non project specific documents can also be uploaded. For example, the HR policy manual, department training material, etc. can be stored here.

To create a new document library:

1. Navigate to the desired Project Site.
2. Click the Site Contents option on the Quick Launch
3. Click add an app from the section labeled Lists, Libraries, and other Apps
4. Click Document Library

The screenshot shows a 'New Document Library' dialog box. On the left, there is descriptive text about document libraries and versions. The main area contains fields for 'Name' (with a text input box), 'Description' (with a text input box), and 'Document Template' (a dropdown menu set to 'Microsoft Word document'). Below these are two radio buttons for 'Document Versions': 'Yes' (unchecked) and 'No' (checked). At the bottom are 'Create' and 'Cancel' buttons.

want it to appear in headings and links
descriptive text that will help site visitors use this

Name:

Description:

Create a version each time you edit a file in this document library?

Yes No

Document Template:

Microsoft Word document

Create Cancel

Figure 9-1 New Document Library

5. Click on Advanced Options
6. Give the new library a relevant Name and Description
7. In the **Document Versions** section, click **No**. Document versions should only be enabled for document libraries that will contain files that are developed over time.
8. In the drop down for Document Template, select None, this make it so that you can have whatever type of document you wish in this Library
9. Click **Create**.

A new link to the document library will now appear in the **Quick Launch** menu under the Recent heading.

Uploading Documents

Any document type including Microsoft Word, Microsoft Excel, Microsoft Access, Adobe etc. can be uploaded to the document library. You can upload a single document or multiple documents at a given time. In addition to uploading existing documents, you can also create a new document directly from a library.

To upload a document to a document library:

1. Navigate to the desired document library in the Project Site.
2. In the library, click new document.
3. Alternatively, in the **Files** tab, **New** group, select **Upload Document only if you want to upload one document**.
4. In order to **Upload Multiple Documents**, drag multiple documents to the area next to new document labeled “or drag files here.”
5. Browse to the folder where your document(s) reside and click **OK**.

The document(s) will now appear in the library.

To create a new document:

1. Navigate to the desired document library in the Project Site.
2. In the **Files** tab, **New** group, click **New Document**.

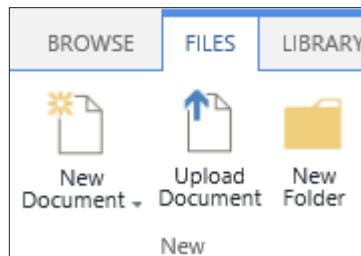


Figure 9-2 New Document Creation

3. A blank Word document will open up with an information bar listing the document properties.
4. Make all desired changes to the document and then from the **File** tab, choose **Save**.

The document will now be saved to the library.

Editing Document Properties

Document properties are the metadata associated with documents that help in searching and organizing them within the Project Site. These attributes can be entered or edited through the Web or within Office Applications, like Word, Excel, or PowerPoint.

To edit document properties on the web:

1. Navigate to the desired document library in the Project Site.
2. Select the ellipsis next to the document title
3. In the Pop up menu, click the ellipsis again.
4. Select Edit Properties

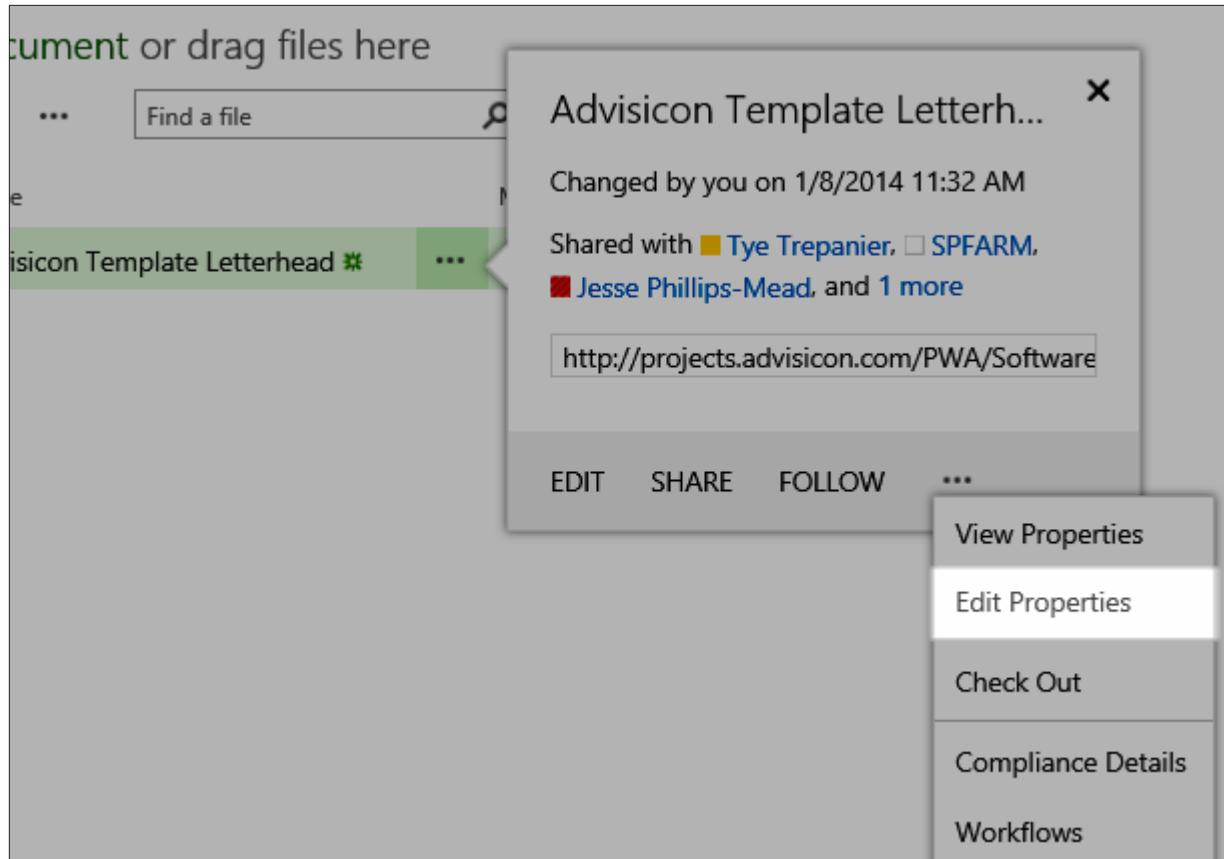


Figure 9-3 Editing Documents

A dialog box with all the related document properties will open.
You can now edit the properties.

To edit document properties within Office applications:

1. Navigate to the desired document library in the Project Site.
2. Open the document for editing in the respective Office application.
3. In the Office application, in the **File** tab, click **Info**.
4. In the properties section, on the right side of the Backstage View, open the **Properties** dropdown menu and choose Show Document Panel.

A document panel will appear in the document below the ribbon bar. This panel will allow you to edit all server based document properties.

Enabling Document Versioning and Check In / Check Out

Document check in and check out controls the editing of documents by multiple people. It ensures that only one person can edit a document at a time. It allows users to have better control when a new version of a document is created and additionally, comment on changes made when a document is checked back in.

As a best practice to edit a document, you should first check out a document. This prevents anyone else from editing the document until you check the document back in.

During the period that a document is checked out, other users can view a read-only version of the document. Changes made while the document is checked out, will not be viewable until it is checked back in.

To check out a document in the document library:

1. Navigate to the desired document library in the Project Site.
2. Click the ellipsis to the right of the document title.
3. In the pop up menu, select the ellipsis again
4. In the dropdown menu, click **Check Out**.
5. Once the document is checked out, select the ellipsis next to the title of the document and select **EDIT**.

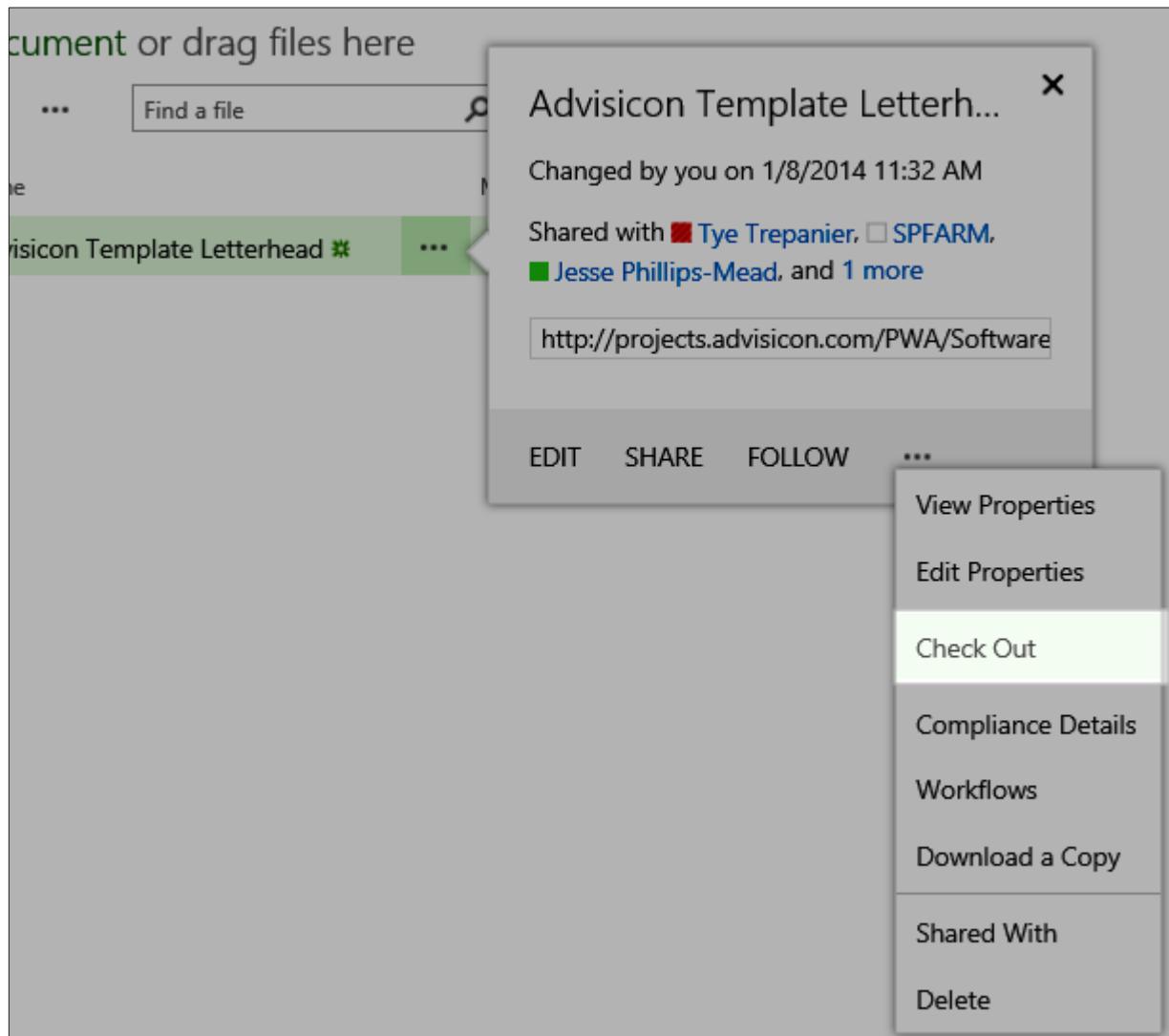


Figure 9-4 Checking Out Documents

- After you have checked out a file, the Check Out option on the menu changes to Check In. You can use this option to check the file back in after you are done making changes.

While check in and check out limits the editing of documents to one person at a time, versioning takes care of keeping track of the changes made to documents. Versioning is the method by which successive iterations of a document are numbered and saved. It makes use of version numbers to track changes. For example, when a document is saved for the first time, it can be assigned version number 1.0. When it is edited and saved again, the version number is increased to 2.0.

To enable version control in a document library:

1. Navigate to the desired document library in the Project Site.
2. In the **Library** tab, **Settings** group, click **Library Settings**.
3. On the **Document Library Settings** page, in the **General Settings** section, click **Versioning Settings**.
4. On the **Versioning Settings** page, in the **Document Version History** section, select **Create major versions** if you only want to enable major versions on documents or select **Create major and minor (draft) versions** if you want both major and minor versions on documents, and click **OK**.
 - **Create major versions** – each time a document is changed and saved, its version number will automatically increase by a whole number.
 - **Create major and minor (draft) versions** – you must explicitly publish major versions through the Publish a Major Version menu option in SharePoint document libraries.

Managing Risks and Issues

Using the Project Site feature, the project manager can keep track of risks and issues related to the project. It allows for capturing, tracking, assigning and monitoring of risks and issues.

A risk is always connected to uncertainty. When something becomes certain to occur, it is called an issue, instead of a risk. Issues are just as important as risks; issues are problems that occur during a project. If an issue is not managed, it can materially affect the successful completion of a project. Your issue list will not be perpetual, as your risk list will be. This is because issues will open and close as they are identified and resolved.

Creating a New Risk Item

Project Server 2010 has pre-defined forms to identify and track risks. The project team can place risk items on the Project Site. Team members can assign risks, categorize them, prioritize them, and define a mitigation and contingency plan to resolve risks. The captured risk data will be stored in the organization's historical information knowledge base and can be used to proactively mitigate similar risks in future projects.

To create a new risk item in the project site:

1. In the **Quick Launch** menu, click **Projects**.
2. Select the project for which you want to create a new risk.
3. In the **Project** tab, **Navigate** group, click on **Project Site**.
4. In the Project Site under Risks, click **New Item**.
5. A new blank risk form will open. At a minimum, complete the required fields and click **Save**.

Title *	<input type="text"/>
Owner	<input type="text"/> Enter a name or email address...
Assigned To	<input type="text"/> Enter a name or email address...
Status	(1) Active <input type="button" value="▼"/>
Category	(2) Category2 <input type="button" value="▼"/>
Due Date	<input type="text"/> <input type="button" value="Calendar"/> 12 AM <input type="button" value="▼"/> 00 <input type="button" value="▼"/>
Probability *	<input type="text"/> %
Impact *	<input type="text"/> 5 The magnitude of impact should the risk actually happen
Cost	<input type="text"/> The cost impact should the risk actually happen
Description	<input style="height: 100px; width: 100%;" type="text"/> The likely causes and consequences of the risk
Mitigation Plan	<input style="height: 100px; width: 100%;" type="text"/> The plans to mitigate the risk
Contingency Plan	<input style="height: 100px; width: 100%;" type="text"/> The fallback plans should the risk occur
Trigger Description	<input style="height: 100px; width: 100%;" type="text"/> The condition that triggers the contingency plan
Trigger	<input checked="" type="radio"/> Date <input type="button" value="▼"/> <input type="radio"/> Specify your own value: <input type="text"/>
<input type="button" value="Save"/> <input type="button" value="Cancel"/>	

Figure 9-5 Risk Creation

- **Title** – defines the risk. This field is required.

- **Assigned to** – identifies the resource responsible for resolving the risk.
- **Status** – identifies the current status of the risk. By default Active, Postponed, or Closed status options are available.
- **Category** – describes the category of risk. The default categories are Category 1, Category 2, and Category 3. These categories can be customized to match the organization's needs. Examples of categories are internal, external, vendors, etc.
- **Due Date** – identifies the date by which a risk should be resolved.
- **Owner** – identifies the name of the person responsible for tracking and managing a risk. The field defaults to the currently logged-on user.
- **Probability** – identifies the chance of a risk actually occurring, measured as a percentage. By default, a range of 1–100% is used to measure probability. This field is required.
- **Impact** – identifies the significance of the risk in terms of how it can affect the outcome of a project. By default, a range of 1–10 is used to measure impact. This field is required.
- **Cost** – identifies the estimated costs of a risk in terms of how it will affect the financial outcome of a project.
- **Description** – describes the likely causes of a risk and what the consequences of the risk might be.
- **Mitigation Plan** – describes the plans for mitigation of the risk.
- **Contingency Plan** – describes the fallback plans in the event that the risk occurs.
- **Trigger Description** – describes the trigger that will require the risk to have a contingency plan.
- **Trigger** – specifies the condition that will cause the risk to require a contingency plan.

Creating a New Issue Item

Like risk forms, the Project Site also has predefined issue forms. Team members can assign issues, prioritize them, discuss the issue item and also describe the resolution plan to resolve the issues.

To create a new issue item in the project site:

1. In the **Quick Launch** menu, click **Projects**.
2. Select the project for which you want to create a new issue.
3. In the Projects tab, **Navigate** group, click **Project Site**.
4. In the Project Site under Issues, click **Add New Item**.
5. A new blank issue form will open. At a minimum, complete the required fields in the and click **Save**.

Title *	<input type="text"/>		
Owner	<input type="text"/> Enter a name or email address...		
Assigned To	<input type="text"/> Enter a name or email address...		
Status	(1) Active <input type="button" value="▼"/>		
Category	(2) Category2 <input type="button" value="▼"/>		
Priority	(2) Medium <input type="button" value="▼"/>		
Due Date	<input type="text"/>	<input type="button" value=" "/>	12 AM <input type="button" value="▼"/> 00 <input type="button" value="▼"/>
Discussion	 		
Resolution	 		
<input type="button" value="Save"/> <input type="button" value="Cancel"/>			

Figure 9-6 Issue Creation

- **Title** – defines the issue. This field is required.
- **Assigned to** – identifies the resource responsible for resolving the issue.
- **Status** – identifies the current status of the issue. By default Active, Postponed, or Closed status options are available.
- **Category** – describes the category of issue, customized for your organization's issue management processes. The default categories are Category 1, Category 2, and Category 3. These categories can be customized to match the organization's needs. Examples of categories are internal, external, vendors, etc.
- **Owner** – identifies the name of the person responsible for tracking and managing the issue.
- **Priority** – identifies the priority of the issue. By default the available options are High, Medium, and Low.
- **Due Date** – identifies the date by which an issue should be resolved.
- **Discussion** – describes the likely causes of an issue and provides a location to which comments about the issue can be added.
- **Resolution** – describes the resolution of the issue.

Linking Risks and Issues

Risks and issues can be identified at a project level or linked further to a task within a project. Risks and issues can also be associated to other risks, issues and documents in the Project Site. Tasks can be the cause of the risk, part of the mitigation plan, part of the contingency plan, or the trigger for the risk. A specific relationship can be defined between tasks and risk and issue items.

To link risks or issues to other items in a project site:

1. Navigate to the Project Site that has the Risks or Issues defined.
2. Click the ellipsis next to the Risk or Issue name.
3. Choose **Edit item**. In the risks or issues page click on the **Custom Commands** tab.

4. Click on **Link Items**. From the dropdown menu choose the item you would like to associate the risk or issue with.

When you link a risk or issue to a project task it will allow you to choose a relationship between the two.



Managing Deliverables

A deliverable is a tangible and measurable result, outcome, or product that must be produced to complete a project or part of a project. Deliverables are generally agreed upon by project stakeholders before the project begins. You can identify deliverables at completion of tasks or at completion of an entire project.

A deliverable in Project 2010 is similar to a deadline date. If the due date of the deliverable is missed, it will not affect the schedule, however you will see a visual indicator for the missed deliverable date. External tasks that impact the finish date of a project can be created as deliverables. This feature helps you to manage cross project dependencies. A project manager can define deliverables within their project plan using Project Professional and have the dates automatically published to a SharePoint list within the Project Site.

Creating Deliverables

Deliverables can be managed by using a Project Site created for each project. They can be created directly on the Project Site or through Project Professional.

To create a new deliverable in Project Web App:

1. In the **Quick Launch** menu, click **Projects**
2. Select the project for which you want to create a new deliverable.
3. In the **Projects** tab, in the **Navigate** group, click on **Project Site**.
4. In the Project Site, under **Deliverables** click **the Items tab**.
5. Under the New group, select New Item

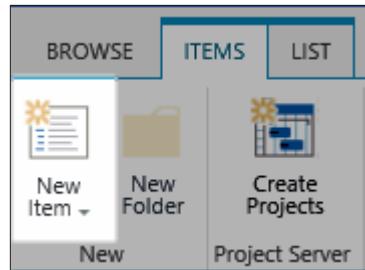


Figure 9-7 New Deliverable Item

A screenshot of the 'Deliverable Creation' dialog box. It contains four input fields: 'Title *' with a required asterisk, 'Description' (empty), 'Deliverable Start' with a date picker icon, and 'Deliverable Finish' with a date picker icon. At the bottom right are 'Save' and 'Cancel' buttons.

Figure 9-8 Deliverable Creation

6. A new blank deliverables page will appear. Fill in the details and click **Save**.

To create a new deliverable in Project Professional:

1. In the **File** tab, click **Open**.
2. In the **Open** dialog box, double click **Retrieve the list of all projects from Project Server**.
3. Open the project for which you would like to create a new deliverable.
4. In the **Task** tab, **Insert** group, open the dropdown menu for **Manage Deliverables and Dependencies**.

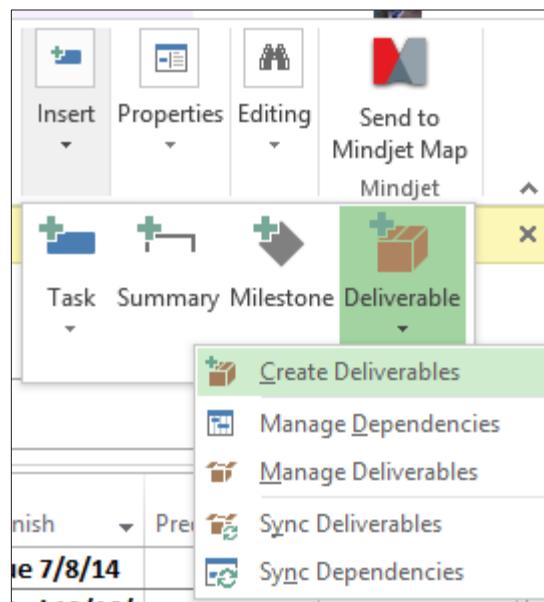


Figure 9-9 Create Deliverables in Project Professional

5. Choose **Manage Deliverables**. A new Deliverables pane will open on the left side of the screen. In the pane, click **Add New Deliverable**.

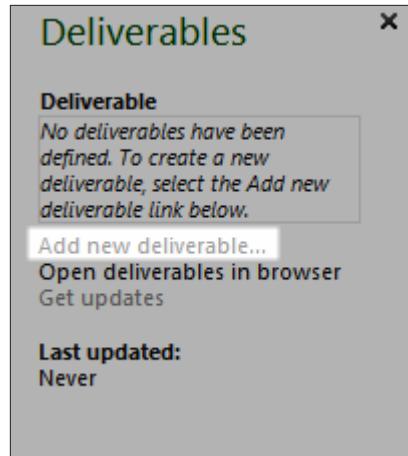


Figure 9-10 Add New Deliverable Pane

6. Enter the deliverable title, start and finish dates, and click **Done**.
7. In order to add an existing task from a project as a deliverable, select the task and from the **Manage Deliverables and Dependencies** dropdown menu, choose **Create Deliverables**. The selected task will be created as a deliverable and a corresponding icon will appear in the indicator column for the selected task.

Linking Deliverables to a Task

A deliverable can be independent or associated with a task or phase in Project 2010. It is possible that the deliverables of one project will affect another project, and thus deliverables need to be tracked. It is important to note that the dates of the tasks are not tied to the dates of the deliverable. If a deliverable date is missed, it will just show a visual indication and not impact the project schedule.

To link a deliverable to a task:

1. Open the project with deliverables associated. In the **Task** tab, **Insert** group, open the dropdown menu for **Manage Deliverables and Dependencies**, and choose **Manage Deliverables**.

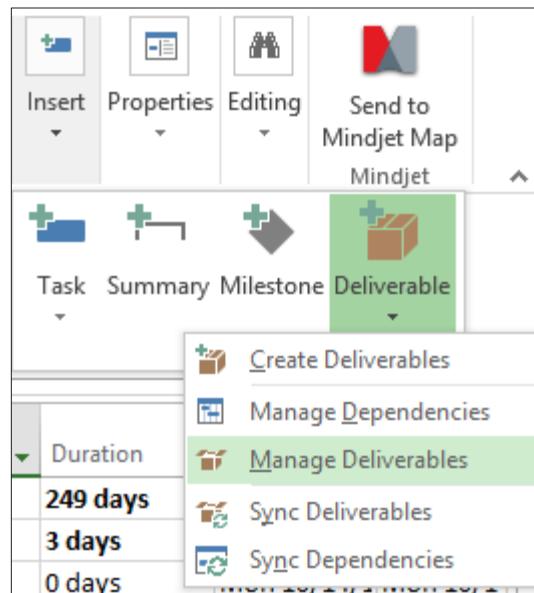


Figure 9-11 Manage Deliverables

2. The Deliverable pane will appear on the left. Select the task and right click the deliverable to be linked to the task.
3. Choose **Edit Deliverable** and select the **Link to Selected Task** checkbox.

An icon will appear next to the task indicating it has a linked deliverable. A Gantt bar will also be displayed with the start and finish dates of the deliverable.

Updating Deliverables

A red exclamation point is displayed to the left of the deliverable name in the Deliverables pane when a deliverable in your project plan is not in sync with the updates on the Project Site.

To update deliverables and dependencies changes:

1. Open the project with the deliverables associated. In the **Task** tab, **Insert** group, open the dropdown menu for **Manage Deliverables and Dependencies** and choose **Sync Deliverables**. This option will update all your deliverables in the project with the latest changes on the Project Site.

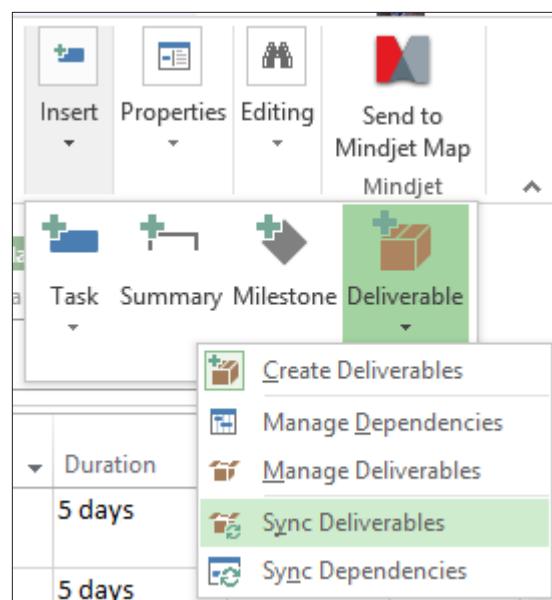


Figure 9-12 Sync Deliverables

- Alternatively, if you want to accept changes one deliverable at a time, in the Deliverables pane, click the deliverable that is out of sync with the server, indicated by a red exclamation point, and click **Accept Changes from Server**.

Key Points to Remember

- Project Sites, based in SharePoint, provide a communication and collaboration hub for project teams.
- Documents, images and pictures can be stored on a Project Site in libraries.
- Project documents in the document library can be managed through check in and check out features. Editing is limited to the user who has the account checked out. Preventing simultaneous editing helps streamline revisions and lessen confusion.
- List items, such as risks, issues and deliverables, can be linked to tasks providing additional information to assist the project team in managing tasks and work.
- Discussion boards provide an asynchronous opportunity to collect feedback from project team members.



Chapter 10

Tracking and Approval Management

Overview

Upon completion of this chapter, the participant will be able to:

- List the available tracking methods in Project Server.
- Evaluate a task update from a team member before approving or rejecting the update.
- Approve a task update in PWA and publish it to the schedule.
- Describe the purpose of the status date in schedule tracking.
- Use Project Pro to track selected tasks which are on schedule or not on schedule.
- Describe the need to reschedule uncompleted work.
- Make schedule changes visible to team members through one of three alternative approaches to publishing.
- List examples of administrative time on a timesheet.
- View the details of a timesheet on the Approvals page.
- Automate approvals with a custom auto approval rule.
- Define the benefits of a delegate and act as a delegate for another resource.

Tracking and Approval Management

After getting your schedule approved, you will be ready to begin executing your project plan, receiving updates, and responding to schedule situations that might require you to revise future tasks. Project Server provides methods to automate task updates in the schedule through the use of the Approvals page.

In this module, you will learn how to work with task updates in PWA, Project Pro, and publish those changes. You will learn about timesheet approvals and how those can give additional information related to administrative hours. You will set up an auto approval rule and learn how delegate resources can support temporary out of office situations.

Task Updates

A **task update** is simply information about the progress made on a task at a specific point in time. The type of information a resource can provide in an update in PWA is determined by the tracking method implemented in the organization (see *Overview of Tracking Methods* on page 188).

All submitted task updates entered by resources through PWA are sent to the owner of the project (normally the project manager) on the Approvals page.

Before we show you the steps to review and accept a task update, we will discuss the various types of tracking methods. Having this information will help you learn more about the types of information you might be receiving from your team members.

Overview of Tracking Methods

The term **tracking methods** refers to various ways resources can report progress on a task in PWA. Progress on a task is how much of the task work is actually completed. Resources who report task progress can submit this information to their project manager, who can apply the progress to the schedule as an update. This process saves the project manager from tracking down resources and asking for their input to the schedule.

In this section, you will learn about the three task update methods:

- Percent of work complete
- Actual work done and work remaining
- Hours of work done per period

After this discussion, we will recommend a best practice for you to follow, which will simplify the tracking process for resources.



Organizations may choose to have a separate timesheet reporting method that tracks hours worked. For more on this see *Timesheets* on page 201.

Using Percent of Work Complete

Percent of work complete is where a resource reports to the best of their ability the percentage of completeness of a task. This option allows a resource to enter any value from 0 to 100. Although some resources might be able to estimate on a very accurate level using percent complete, we recommend that you provide some structure or guidelines around this option. For example, instead of allowing resources to enter any number, you may want to suggest using 25%, 50%, 75% and 100% as recommended values. This way a resource does not have to worry about getting the value exactly correct.

Another scenario that you could use is to attach a definition to a percentage. For example, 25% could mean “getting started,” while 75% could mean “substantially complete.”

Using Actual Work Done and Work Remaining

Reporting task progress using actual work done and work remaining is where a resource keeps track of the total work done across all periods and records what is left in terms of work for the task. For example, if a resource did 4 hours of work during period one, and then 2 hours of work during period two, the actual work done would equal 6 hours. If the resource then does 3 more hours of work in period three, the actual work done would equal 9 hours. Since this method may require a resource to remember or review historical information, it is not useful when resources are working on numerous projects with a multitude of tasks.

Remaining work can be automatically calculated or revised by the resource as needed.



Using Hours of Work Done Per Period

Reporting task progress using hours of work done per period is where the resource simply reports their hours on a task that occurred only during that period. Resources do not need to worry about hours entered in past periods. This is a very popular method and you will discover in *Participating as a Team Member* that this option can be tied to a traditional timesheet and automatically copy information from resource timesheets into hours worked.

Remaining work can be automatically calculated or revised by the resource as needed.



Project Server can be configured in different ways based on organizational preferences. Please consult your internal Project Management Office or administrator to learn about the configuration of your environment.



Best Practices – Tracking Methods

Although Project Server may be configured to allow each project manager to choose their own tracking method for each project, a best practice is to enforce one tracking method for all projects. Using one method will create a uniform data entry screen for all projects on which resources are working. It will also simplify the onboarding process for new resources since they will only have to be trained in one method. In addition, reports or views across all projects will have the same level of detail of information such as percentage complete or actual hours reported.



Setting the tracking method for all projects across the organization is something that will be done by your administrator and it will automatically apply to your projects so no additional configuration will be needed.

Reviewing a Task Update and Taking Action

The process of approving task updates involves evaluating the information received from the team member and choosing to either approve or reject the update.



The team member must choose the option to **Send Status** before updates will appear on the Approvals page.

How to view Task Details

- To view Task Details via the Quick Launch
 - a. In the Quick Launch menu, click **Approvals**.
 - b. Adjust the dividing bar to see any hidden columns.
- To view Task Details via the Task Details dialog box.
 - a. Click the task name.

- b. Review the information in the **Task Details** dialog box.
- c. Click **Close** when finished.

How to preview updates

1. In the Quick Launch menu, click **Approvals**.
2. Click the checkbox for the desired row.
3. On the **Approvals** tab, in the **Actions** group, click **Preview Updates**.
Notice an additional tab in Internet Explorer has been opened with the preview of the project.
4. Close the tab in Internet Explorer to return to the Approvals page.

How to Approve a Task Update

1. In the Quick Launch menu, click **Approvals**.
2. Click the checkbox for the desired row.
3. On the **Approvals** tab, in the **Actions** group, click **Accept**.
4. In the **Confirm Approval** dialog box, type any desired comments and click **OK**.

How to Reject a Task Update

1. In the Quick Launch menu, click **Approvals**.
2. Click the checkbox for the desired row.
3. On the **Approvals** tab, in the **Actions** group, click **Reject**.
4. In the **Confirm Approval** dialog box, type any desired comments and click **OK**.

Updates that might alter other tasks or resource assignments in the schedule require that the schedule be published for these changes to be visible. Refer to the section *Publishing a Schedule* on page 199 for these instructions.



Tracking and Reporting with Project Professional

While team members have the ability to update their tasks in PWA, some tasks will need to be updated manually by the project manager in Project Pro. Reasons for this include tasks that are assigned to vendors or local resources who do not have access to PWA, or the project manager will have tasks assigned to himself that he would like to quickly update, such as milestones. Also, there may be some tasks that have not yet started or have uncompleted work and need to be modified. These adjustments are better suited for Project Pro.

In this section, you will learn the purpose of a status date, learn how to quickly update a project as scheduled and learn how to reschedule uncompleted work.



Be sure you have received all updates from resources on tasks before doing updates in Project Pro. This will avoid losing information from your resources that could affect your overall schedule.



It is a best practice to allow resources who have access to PWA to complete their updates in Project Server. This will save the project manager time from doing a manual update.

What is a Status Date?

The **status date** is the date that represents your progress marker at a specific point in time. The status date is used a visual indicator of where your project progress should be. In other words, items to the left of the status date should be complete and items to the right of the status date should be incomplete. If that isn't true then either your project hasn't been properly updated (e.g. unapproved updates are available in PWA) or tasks

are ahead or behind schedule and will need to be adjusted. The status date is determined by the project manager and may or may not be equal to today's date. For example, it is possible that the project manager is on vacation and the status date is for last week.

If you change the status date, it will maintain that date. Be sure to change the status date to the next time period before receiving further task progress through PWA or before making task updates yourself that relate to the next time period.



Other names for the status date include "data date" or "time now." The status date is used for several calculations in Project Pro including earned value calculations and options that automatically calculate a task's completion status or automatically shifts a task based on its progress.

	Task Name	Status Manager	Jan 26, '14						
			25	26	27	28	29	30	31
1	■ Infrastructure Deployment	Jesse Phillips							
2	▲ Scope	Jesse Phillips							
3	✓ Determine project scope	Jesse Phillips							
4	Secure project sponsorship	Jesse Phillips							
5	■ Define preliminary resources	Jesse Phillips							
6	Secure core resources	Jesse Phillips							
7	Scope complete	Jesse Phillips							
8	▲ Analysis	Jesse Phillips							
9	▲ Review Current Infrastructure	Jesse Phillips							

Figure 10-1 Tracked Project Showing Status Date and Current Date

When printing a view that displays the status date, you can easily communicate to others when the schedule was last updated and –depending on the type of Gantt chart displayed – late tasks or early tasks can be easily identified.



By default, the status date will always equal today's date. If that is not appropriate for your needs, it will need to be modified.

To set or change the status date:

1. The schedule you wish to publish should already be open.
2. On the **Project** tab, in the Status group, click the date next to **Status Date**.

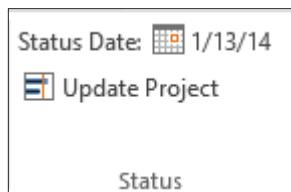


Figure 10-2 Status Date

3. In the **Status Date** dialog box, choose or enter the desired date and click **OK**.



The status date line will not be visible in Gantt chart view unless you have the status date gridline configured with a line style and color.

Updating Selected Tasks as Scheduled

When a group of tasks are proceeding normally and you want to make an update to all of them, you can choose to update selected tasks as scheduled. This process will use the status date as a guide and everything that should be completed to the left of the status date will be marked complete, while everything that should start to the right after the status date will remain uncompleted. If a task is split across the status date, only the portion that is to the left will be marked completed, the remaining portion representing the future will be left as uncompleted.



It is not necessary to set the status date before choosing the option below, since you will have an option to set the status date in the **Update Project** dialog box below.

To mark selected tasks as on schedule:

1. The schedule you wish to work with should already be open.
2. Select the desired tasks.
3. On the **Project** tab, in the **Status** group click, **Update Project**.

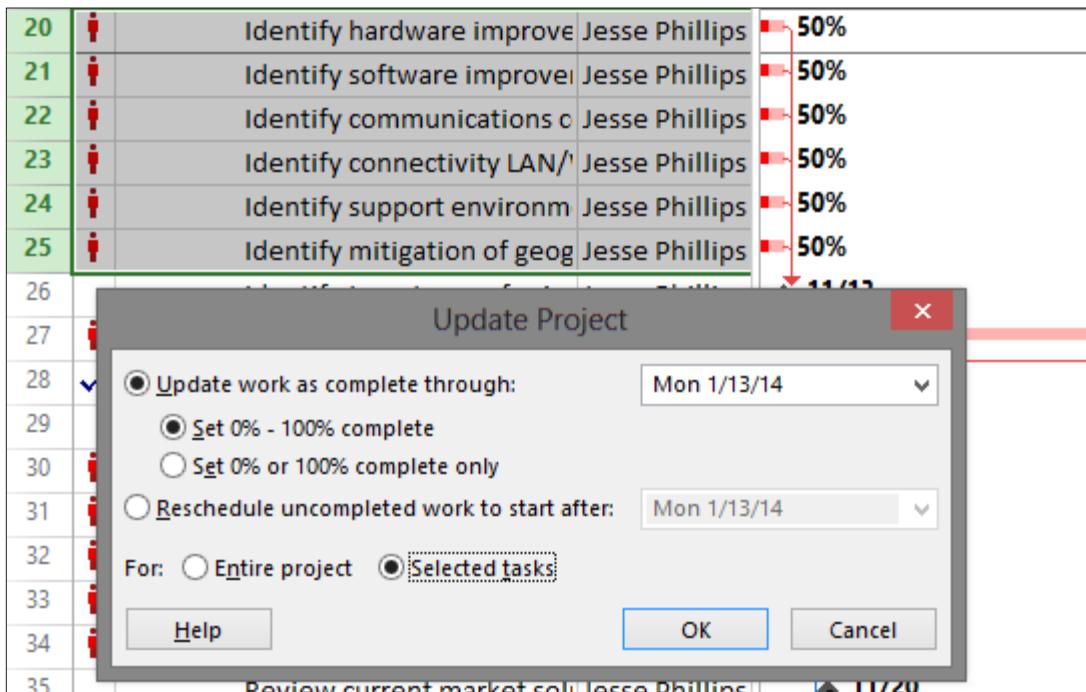


Figure 10-3 Update Selected Tasks Using the Update Project Dialog Box

4. In the Update Project dialog box, click **Update work as complete through:** and chose the desired status date from the dropdown menu.
5. Choose either **Set 0% – 100% complete** or **Set 0% or 100% complete only**.
 - 0% – 100% complete means you would like Project Pro to mark the exact percentage of a task based on where it should be as of

the status date. You could see any percentage such as 21%, 39%, etc.

- 0% or 100% complete means you would like Project Pro to mark any task at 0% or 100% only. All tasks, even if they have started will be marked at 0% unless they are finished and they will then be marked at 100%.

6. Next to **For:**, click **Selected Tasks** and click **OK**.



You can also choose the **Mark On Track** button on the **Task** tab in the **Schedule** group to quickly update a task as on schedule. This option will use the existing Status Date and apply the exact percent complete (0-100%) automatically.

Updating Tasks Not On Schedule

Tasks that are being updated manually will not always progress according to the schedule. Tasks may start early or late or may be expected to have a shorter or longer time period to complete. In these instances, you will need to follow a process to update a task not on schedule.

1. The schedule you wish to work with should already be open.
2. Select the desired task.



Selecting only one task is recommended if you want the Update Tasks dialog box to display any available details about the task, such as current start and finish date, or current remaining duration.

3. On the **Task** tab in the **Schedule** group, click the **Mark on Track** dropdown and click **Update Tasks**.

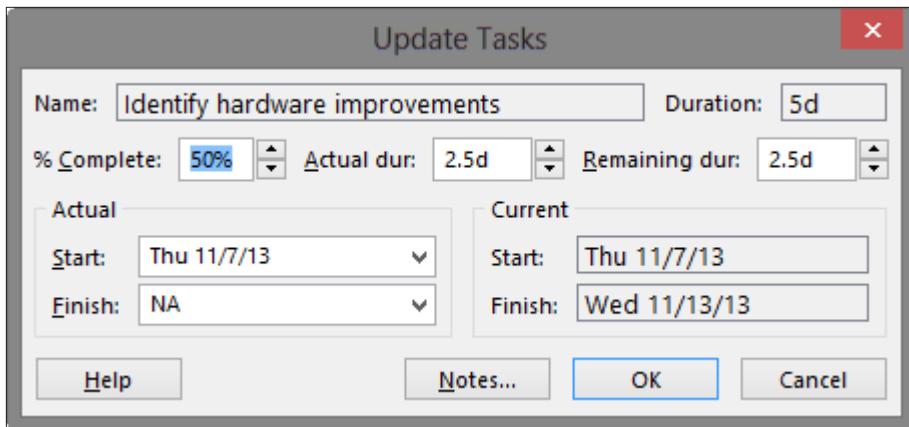


Figure 10-4 Update Tasks Dialog Box

4. Enter or change the information in one or more of these five fields of information: **% Complete;**, **Act dur:**, **Remaining dur:**, **Actual Start:**, and **Actual Finish:**.

You do not need to enter information in all of the fields, just enter the available information. Project Pro will calculate the remaining fields. For example, if you enter actual duration and remaining duration, Project Pro will calculate % complete and make the actual start date match the current start date. In other words, you are reporting that the task has started on time but you are adjusting the total duration for the task based on what has already occurred.



5. Click **OK**.
6. Repeat for additional tasks as needed.

Rescheduling Uncompleted Work or Moving a Task

Rescheduling uncompleted work is used when scheduled work or work that should have been completed has not occurred. Rescheduling uncompleted work shifts the work to a future date. It may also be necessary to manually move a task to accommodate a schedule situation, such as a resource out for illness.

Advisicon recommends that you reschedule work manually on a task-by-task basis. If you choose to ignore uncompleted work that should have been done, it is likely that resources will not remember to go back and search out this work from a prior time period and skipping a task may alter the completion of the project.



Setting options to automatically reschedule uncompleted work is not recommended when you are using Project Pro because it may reschedule a task before all the resources working on it have reported progress.

To reschedule uncompleted work or move a task:

1. The schedule you wish to work with should already be open.
2. If needed, adjust the Status Date as discussed above.
3. Select the desired tasks.
4. On the **Task** tab, in **Tasks** group, click the **Move** dropdown and choose the desired option.

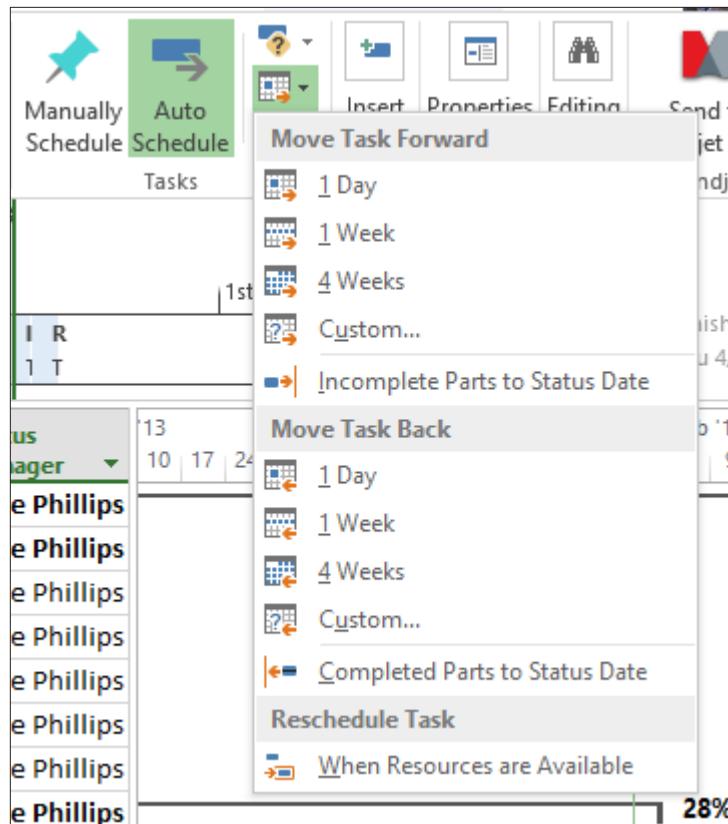


Figure 10-5 Task Reschedule and Move Options in Project Pro

Moving a task will set a constraint on task but this may be required to position a task in the future. Choosing **Incomplete Parts to Status Date** will reschedule only the unfinished portion of the task to start after the Status Date which is useful for a task that is falling behind schedule.



Publishing a Schedule

There are three different options for publishing a schedule following approval of a resource task update or following an update in Project Professional. We recommend you choose the method that is the most

comfortable for you or the one that saves as many steps as possible based on the update that you recently completed.

To Publish a schedule following an approved task update in PWA:

1. In the Quick Launch menu, click **Approvals**.
2. On the **Approvals** tab, in the **Navigate** group, click the **History** dropdown and then click **Status Updates**.
3. Click the checkbox for the desired row(s).
4. On the **Status Updates** tab, in the **Actions** group, click **Publish**.
5. If desired, on the **Status Updates** tab, in the **Navigate** group, click **Approval Center** to return to the **Approvals** page.



We prefer using this shortcut method at Advisicon when we are already on the **Approvals** page since we do not have to open the project to do a Publish.

To Publish a schedule in PWA

1. In the Quick Launch menu, click **Projects**.
2. On the **Project Center** page, click on the name of the enterprise project.
3. In the Quick Launch menu for the selected project, click **Schedule**.
4. In the **Task** tab, in the **Project** group, click **Edit** and then click **In Browser**.
5. In the **Task** tab, **Project** group, click **Publish**.

To Publish a schedule in Project Pro

1. The schedule you wish to publish should already be open.
2. Click the **File** tab to display backstage view.
3. On the **Info** tab, click **Publish**.

Timesheets

A timesheet is a record of hours worked on projects and may include non-project work hours in various administrative time categories such as vacation, sick, or training. Timesheets are normally a historical record of the past week, but may include administrative time recorded into the future for planned events such as vacation time.

Final timesheets created by resources through PWA are sent to the timesheet approver or resource manager on the Approvals page. This is only true if the resource does not have automatic approval of their own timesheets.

In some organizations, the project manager approves timesheets in addition to task updates. Advisicon is providing this section as a benefit to project managers who also function as timesheet approvers or resource managers.



If a resource tells you that a timesheet was submitted but you do not see it on your Approvals page, it could be because project managers of other projects have not approved all task updates and this could prevent the timesheet from being sent for approval. The feature which holds a timesheet until all task updates have been approved is controlled by your administrator.



How to view timesheet details

1. In the Quick Launch menu, click **Approvals**.
2. Click **My Timesheet** for the desired row.
3. In Internet Explorer, click **Back to Approval Center** (left arrow) to return to the **Approvals** page.

How to accept or reject a timesheet

1. In the Quick Launch menu, click Approvals.
2. Click the checkbox for the desired timesheet row.
3. On the **Approvals** tab, in the **Actions** group, click **Accept** or **Reject**.
4. In the **Confirm Approval** dialog box, type any comments and click **OK**.

Auto Approval Rules

To simplify the process of seeking approval and limit the number of approvals a project manager is required to review, you have the option to set up an **auto approval rule**. If you are familiar with e-mail rules which locate an e-mail with a specific topic and automatically delete the message or automatically take another action such as move the message into a folder, the general concept is the same in Project Server; a rule is automating a repetitive action. Auto approval rules can be tailored for a specific project, specific resource, or specific type of task. Rules can also run and publish the schedule automatically or be run manually.



Auto approval rules clean up the approvals page for you. To view the approvals that were completed through a rule, you need to view the history.

To set up an auto approval rule:

1. In the Quick Launch menu, click **Approvals**.
2. On the **Approvals** tab, in the **Navigate** group, click **Manage Rules**.

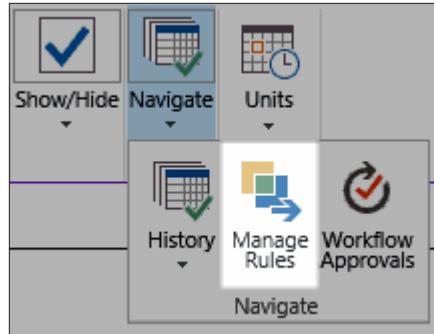


Figure 10-6 Accessing Auto Approval Rules

3. On the **Rules** tab, in the **Rule** group, click **New**.
4. On the **Edit/Create Rule** page:
 - a. In the **Name:** box, type a name for the rule.
 - b. In the **Description and Comments for Team Members:** box, type a description if desired.
 - c. In the **Automatic updates** section you have two choices.
Decide if you want the rule to run and/or publish without your intervention.
 - d. In the **Request Types** section, you have four choices.
Decide which types of task updates this rule should apply to.
 - e. In the **Projects** section, you need to choose one option.
Decide if you want the rule to apply to specific projects or all projects.
 - f. In the **Resources** section, you need to choose one option.
Decide if you want the rule to apply to specific resources or all resources.
 - g. Click **Save** to accept all changes.

Delegation

Resources can become unavailable for any number of reasons. If you know that a resource will be permanently unavailable, you should reassign their work to another person who will take ownership. However, a resource

may become unavailable for a short period of time and then will be able to resume their work. In an instance such as illness, a personal holiday, or a short leave of absence, the efficient way to reassign work in PWA is to create a delegate who will act as a temporary substitute for the absent resources.



Warning – Delegation only works in PWA, it does not work in Project Pro.

Managing Delegates

A person who temporarily manages work for another peer is called a **delegate**. Advisicon recommends that you select delegates who perform the same job role as the person who will be temporarily unavailable. This will make the transition very smooth during the delegation period and should prevent accidental security breaches or unexpected changes which might occur if a delegate is selected from a different job role.



Your Project Server administrator can choose a delegate for any user in the organization. Project managers are only allowed to create a delegate for themselves.

Use the expiration date for the delegate so you don't have to remember to disable it at a future date.

To create a delegate:

1. In the Quick Launch menu, click **Server Settings**.
2. Under **Personal Settings**, click **Manage Delegates**.



Figure 10-7 Manage Delegates Option

3. In the ribbon under the **Delegate** section, click **New**.
4. On the **Add Delegation** page, Set **Delegation Period** in the **From** and **To** fields.
5. Add both the **Set Delegate** and **Working on Behalf Of** fields to complete the delegation assignment.
6. Click **Save**.

Acting as a Delegate

After being assigned as a delegate, the delegate will perform two independent roles in PWA: the delegate's own job functions in PWA and the person's job functions for whom they are acting as a delegate. This may include updates to tasks, timesheets, approvals, and schedules.

Throughout the delegate session, you are provided a notice in the status line that you are in a delegate session. Failure to stop this session incorrectly attributes your job functions to the person you are acting as a delegate for.



To act as a delegate:

1. In the Quick Launch menu, click **Server Settings**.
2. Under **Personal Settings**, click **Act as a Delegate**.

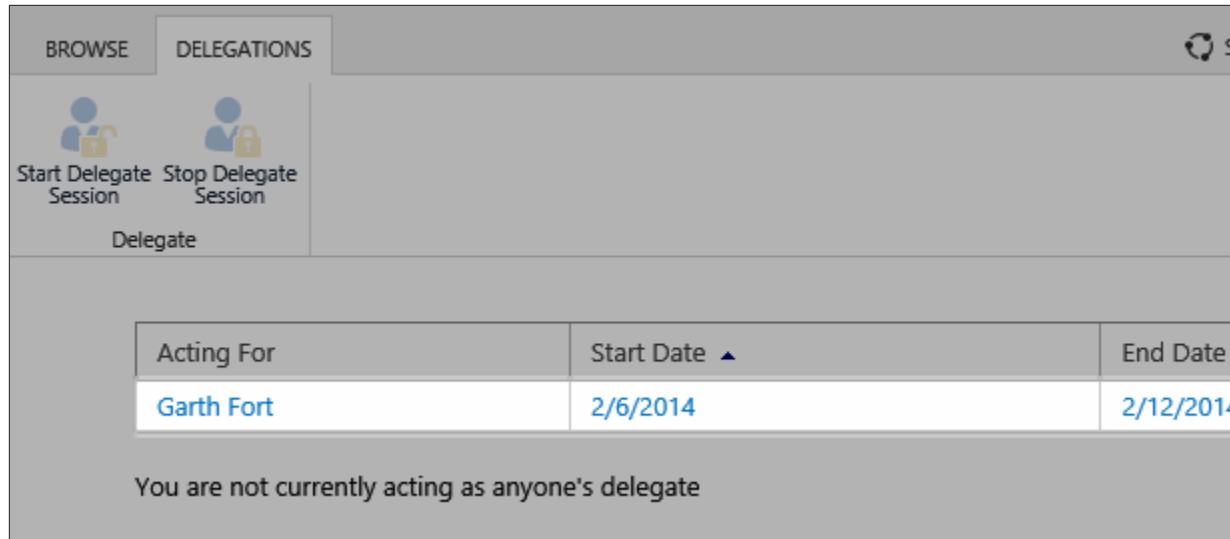


Figure 10-8 Act as a Delegate Option

3. Click the name of the resource you need to perform delegate duties for and then on the **Delegations** tab, in the **Delegate** group, click **Start Delegate Session**.

The screenshot shows the 'DELEGATIONS' tab selected. On the left, there is a vertical menu with options: 'Projects', 'Approvals', 'Tasks', and 'Timesheet'. To the right of the menu is a table showing delegation sessions. The table has three columns: 'Acting For', 'Start Date ▲', and 'End Date'. There are four rows in the table, each corresponding to a resource: 'Test Guy' (start date 1/28/2014), 'Jeff Poste' (start date 1/28/2014), 'Garth Fort' (start date 1/28/2014), and another row for 'Garth Fort' (start date 1/28/2014).

Acting For	Start Date ▲	End Date
Test Guy	1/28/2014	
Jeff Poste	1/28/2014	
Garth Fort	1/28/2014	
Garth Fort	1/28/2014	

Figure 10-9 Starting a Delegation Session

To stop acting as a delegate

1. In the status line, notice the option **Click here to manage your delegation.**
2. Click the hyperlinked word **here** to return to the **Act as a Delegate** page.
3. On the **Delegations** tab, in the **Delegate** group, click **Stop Delegate Session.**

Key Points to Remember

- Receive updates from team members in PWA is the most efficient way to track and update the schedule.
- The Approvals page lists Status Updates and Timesheet pending approvals from team members.
- Update or track progress on tasks in Project Pro when a local resource does not have access to PWA to provide updates or as a shortcut for the project manager to update his own tasks.
- Use Project Professional and available features to reschedule or move tasks that are not proceeding according to schedule.
- Publishing a schedule through the History on the Approvals page is a fast way to publish without opening the schedule.
- Publishing a schedule is required following task updates or approvals so changes to the schedule are applied and visible to team members.
- Timesheets may be auto approved or be sent to a timesheet approver, such as a resource manager, or project manager.
- Timesheets represent hours worked for an entire week and may include administrative time such as sick, training, and vacation time.
- Set up auto approval rules to automate repetitive tasks for the project manager.
- Delegation is useful way to have someone fill in for a resource who will be out of the office for a temporary period of time.



Chapter 11

Finalizing a Schedule

Overview

Upon completion of this chapter, the participant will be able to:

- Explain what causes an overallocated resource.
- List techniques to solve resource overallocations.
- List techniques to shorten the schedule.
- Work with Task Inspector and Team Planner view.
- Define a baseline.
- Set a baseline in PWA or Project Pro.
- Discuss scope changes and options to update a baseline.

Finalizing a Schedule

An often overlooked piece of scheduling is tracking. For tracking to be effective, it should be accompanied by a process for finalization and approval of your schedule before work is begun. The main goal here is to ensure your project is finalized and ready to receive updates. The first steps toward finalizing your schedule are resolving resource overallocations and ensuring your schedule is optimized to meet project deadlines.

Resolving Resource Overallocations

If you discover that – due to the limits of your resources – you will be unable to complete the project on schedule, you already have an unrealistic project plan. At Advisicon, we recommend that you solve these problems before finalizing your schedule.

The most common resource conflict is **resource overallocation**. This kind of resource conflict means that the conflicted resources have more work assigned to them than they can realistically complete in the given time frame.

While there are multiple ways to alter resource allocation, it is important to find and analyze its source. As part of your analysis, evaluate the overall effect of fixing the overallocation on the project schedule before making changes.

Some options to consider for solving resource overallocations are:

- Hire additional resources (see Chapter 6, *Resource Management in Project Pro*)
- Replace a resource on a task (see Chapter 6, *Resource Management in Project Pro* and *Working with Team Planner View* on page 104)

- Assign a resource to work overtime (see Chapter 6, *Resource Management in Project Pro*)
- Increase work time (calendar) (refer to the course *Managing Projects in Project Pro 2013*)
- Break a task up into smaller tasks
- Adjust the division of work across the task (work contour) (see Chapter 6, *Resource Management in Project Pro*)
- Move the task until the resource is available
- Delete tasks (see Chapter 5, *Scheduling*)
- Change overlapping tasks into sequential tasks by using Project's leveling feature



For Project's automatic leveling to be effective in Project Server, it requires that the project manager or scheduler have the ability to open and edit all other projects that the resource is working on. In most organizations, this is not the case. So, at Advisicon, we recommend our clients manually solve resource overallocations using other methods instead; therefore, leveling is not covered in this book.

- Use Task Inspector to solve the problem
- Use Team Planner to solve the problem

Hire Additional Resources

Hiring is a project management technique which may mean negotiation for new resources. Refer to Chapter 6, *Resource Management in Project Pro* to review techniques for adding resources to your team and changing assignments.

Replace a Resource on a Task

Refer to Chapter 6, *Resource Management in Project Pro* to learn more about resource assignments and replacing resources. Also refer to *Working with Team Planner View* on page 104.

Assign a Resource to Work Overtime

Refer to Chapter 6, *Resource Management in Project Pro* to review the technique to display Resource Usage view and where work hours can be increased on a daily basis. Note: using the overtime work column only offers an advantage if you are paying your resource a different overtime rate.

Increase Working Time

In a Project Server environment, the calendar may be controlled by the administrator. If you have the option to change it, refer to the course *Managing Projects in Project Pro 2013*.

Break a Task Up Into Smaller Tasks

This is a project management technique where you take a long task and divide it up into a collection of smaller tasks. Then you can distribute the pieces to different resources as desired.

Adjust the Division of Work Across the Task

Refer to Chapter 6, *Resource Management in Project Pro* and how to use Resource Usage view to display and edit work values on a daily basis. Adjusting the work in this manner is called work contouring because it may resemble a pattern or shape if graphed (e.g. turtle).

Delete Tasks

This is a project management technique where you are cutting scope by deleting tasks. To learn more about deleting tasks refer to Chapter 5, *Scheduling*.

Move a Task Until the Resource is Available

1. In the **Task** tab, in the **View** group, click **Gantt Chart**.
2. Select the task with the overallocated resource. The red overallocation indicator appears in the **Indicators** column as a reminder.
3. In the **Tasks** tab, in the **Tasks** group, click the **Move** dropdown and then click the desired choice.

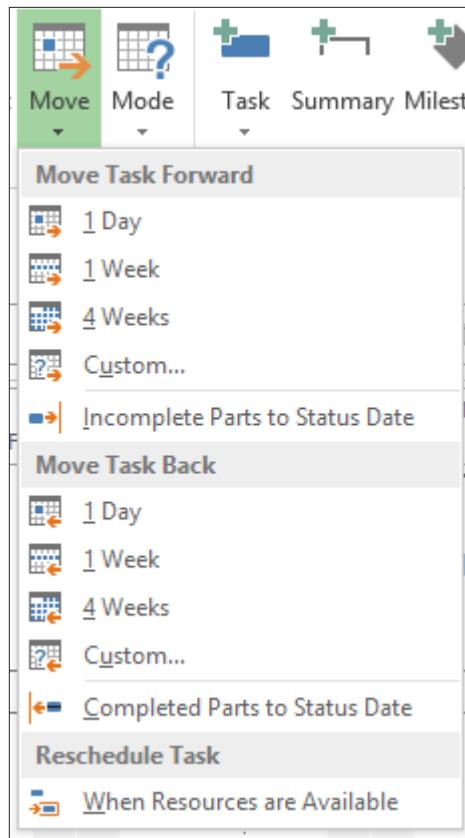


Figure 11-1 Moving a Task Feature

The **Move** option **When Resources are Available** works kind of like leveling. The difference is that it is specific to one task instead of the entire project. Moving one task is often preferred since it eliminates surprises to the project manager who often sees an entire project shift when leveling is applied.



Moving a task using any of the options in the Move dropdown creates a constraint on that task. Since you are moving the task due to a resource limitation, you are modeling a situation where the links between tasks do not allow you to work on the task as scheduled and therefore a constrained task is needed.



How to Use Task Inspector

1. In the **Task** tab, in the **View** group, click **Gantt Chart**.
2. In the **Tasks** tab, in the **Tasks** group, click **Inspect**. Notice the pane that appears to the left of the Gantt Chart.

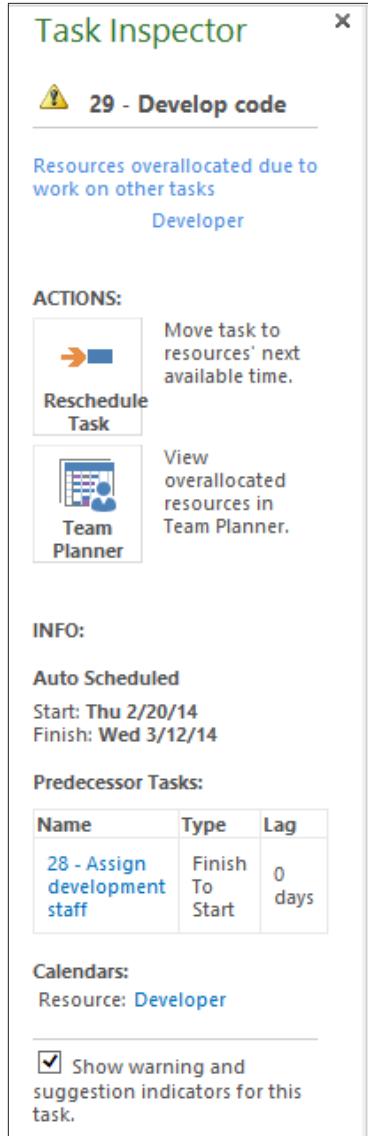


Figure 11-2 Using Task Inspector to Evaluate Task

3. Click any desired task. View the information and recommendations in the Task Inspector.
 - You can click other tasks to view their information.
 - You can follow a recommended action in the Task Inspector pane.
 4. Click **Close (X)** on the Task Inspector pane to hide it.

Task inspector only shows the details of one task at a time.



How to Use Team Planner

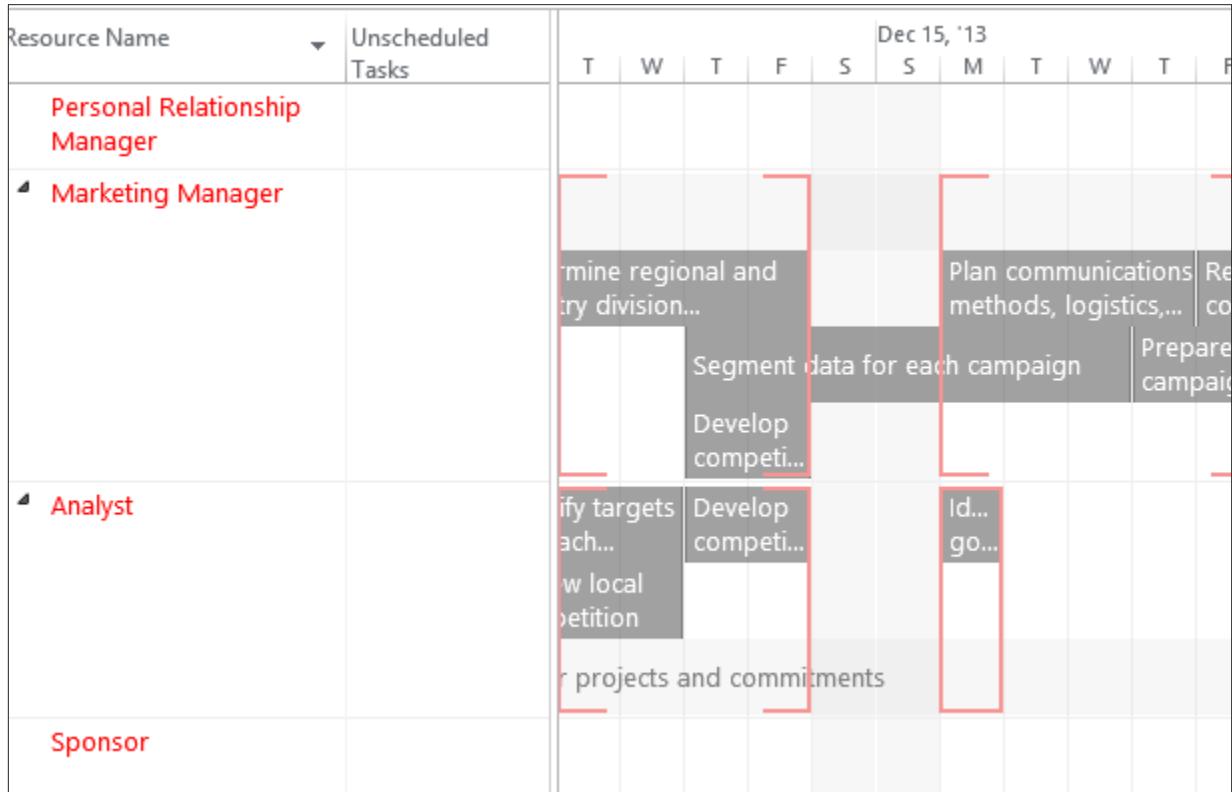


Figure 11-3 Team Planner View with Overallocated Resources

1. In the **Task** tab, in the **View** group, click the **Gantt Chart** dropdown and click **Team Planner**.

2. Locate the overallocated resource and task you wish to make changes to.
 - Hover on the task to view relevant details.
 - Right-click on the task name to quickly reassign the task, delete it, or deactivate it.
 - Double-click the task to view the Task Information dialog box and make any needed changes.
 - Drag the task in team planner view to reassign or move the task to a locked in time period (sets a constraint)
3. In the **File** tab, click **Publish** to save the changes and share them with your project team via PWA.



Warning – If you see blank information within brackets on the right side of the view (the timescale), you will need to zoom out so the text crossing over multiple time periods can be displayed.



Double-click **Other projects and commitments** if you want to see the names of other projects your resources have been assigned to that are not currently open.

Optimizing the Schedule to Meet Deadlines

Scheduling involves more than creating a detailed schedule and assigning resources; it also involves modifying the schedule to meet goals and to work within limitations. Typically, there are deadlines within your schedule that must be met to satisfy the requirements of your sponsor. If your schedule shows that you are missing those deadlines, you need to take steps to optimize the schedule.

In most cases, optimizing the schedule requires you to shorten your project's overall finish date. The finish date is driven by the critical path of your project. The **critical path** includes those tasks that drive the total duration

of your project. If a critical task finishes late, it delays the entire project. If a critical task finishes early, it shortens the duration of the project. If you shorten the length of the critical path, you shorten the duration of your project, and your project finishes sooner.

Listed below are some options to shorten your schedule. The method you choose depends on your individual project and the resources you have available.

- Assign additional resources (see Chapter 6, *Resource Management in Project Pro*)
- Assign a resource to work overtime (see Chapter 6, *Resource Management in Project Pro*)
- Increase working time (calendar) (refer to the course *Managing Projects in Project Pro 2013*)
- Break task into smaller tasks
- Overlap key activities (multi-tasking)
- Change dependencies of tasks
- Delete tasks (see Chapter 5, *Scheduling*)
- Redefine quality (less time on activities) (see Chapter 5, *Scheduling*)
- Break project into phases (see Chapter 5, *Scheduling*)
- Use Task Inspector to solve the problem (see *How to Use Task Inspector* on page 216)
- Use Team Planner to solve the problem (see *How to Use Team Planner* on page 217)

Optimizing the schedule and shortening the critical path may create new resource overallocations. You should watch for the **Overallocation Indicator** icon in the **Indicators** column to alert you that you need to address a new resource overallocation.



Besides giving useful tips to solve overallocated resources, Team Planner shows you predecessor tasks, constraints, and task calendars which could be useful to help you determine what is causing a task to start at a particular time. Accessing Team Planner and Task Inspector are covered in *How to Use Task Inspector* on page 216.



Assign Additional Resources

Refer to Chapter 6, *Resource Management in Project Pro* to review techniques for assigning resources and how duration is shortened on Fixed Work tasks. You can also do this with Team Planner view.

Assign a Resource to Work Overtime

Refer to Chapter 6, *Resource Management in Project Pro* to review the technique to display Resource Usage view and where work hours can be increased on a daily basis. Note: using the overtime work column only offers an advantage if you are paying your resource a different overtime rate.

Increase Working Time

In a Project Server environment, the calendar may be controlled by the administrator. If you have the option to change it, refer to the course *Managing Projects in Project Pro 2013*.

Break the Task into Smaller Tasks

This is a project management technique where you take a long task and divide it up into a collection of smaller tasks. Then you can apply the technique to overlap some of these tasks will shorten the overall duration.

Delete Tasks

This is a project management technique where you are cutting scope by deleting tasks. To learn more about deleting tasks refer to Chapter 5, *Scheduling*.

Refine Quality

This is a project management technique where you reduce the time given to the task and accept a reduced quality of your output. For example, you could skip proofreading pass two on a book and accept that some errors will be in the final book.

Break the Project Into Phases

This is a project management technique where you choose to group the project into phases and postpone some phases to a later time to complete the project sooner. Refer to Chapter 5, *Scheduling* for details about creating Summary tasks.

Overlap Tasks or Change Dependencies

Overlapping critical tasks is one of the most popular methods to shorten the schedule. It is sometimes referred to as “fast-tracking your schedule.”

1. In the **Format** tab, in the **Bar Styles** group, click the **Critical Tasks** checkbox. This will change the Gantt bar color from blue to red for critical tasks. Since the critical tasks drive the end date of your project, it is useful to have them visible.
2. Locate two linked tasks you want to overlap.

3. Double-click the successor (dependent) task.
 4. In the **Task Information** dialog box, click the **Predecessors** tab.
 5. On the row of the desired predecessor task, in the **Type** dropdown list, make the desired change. In the **Lag** field click the dropdown list or type the desired change.

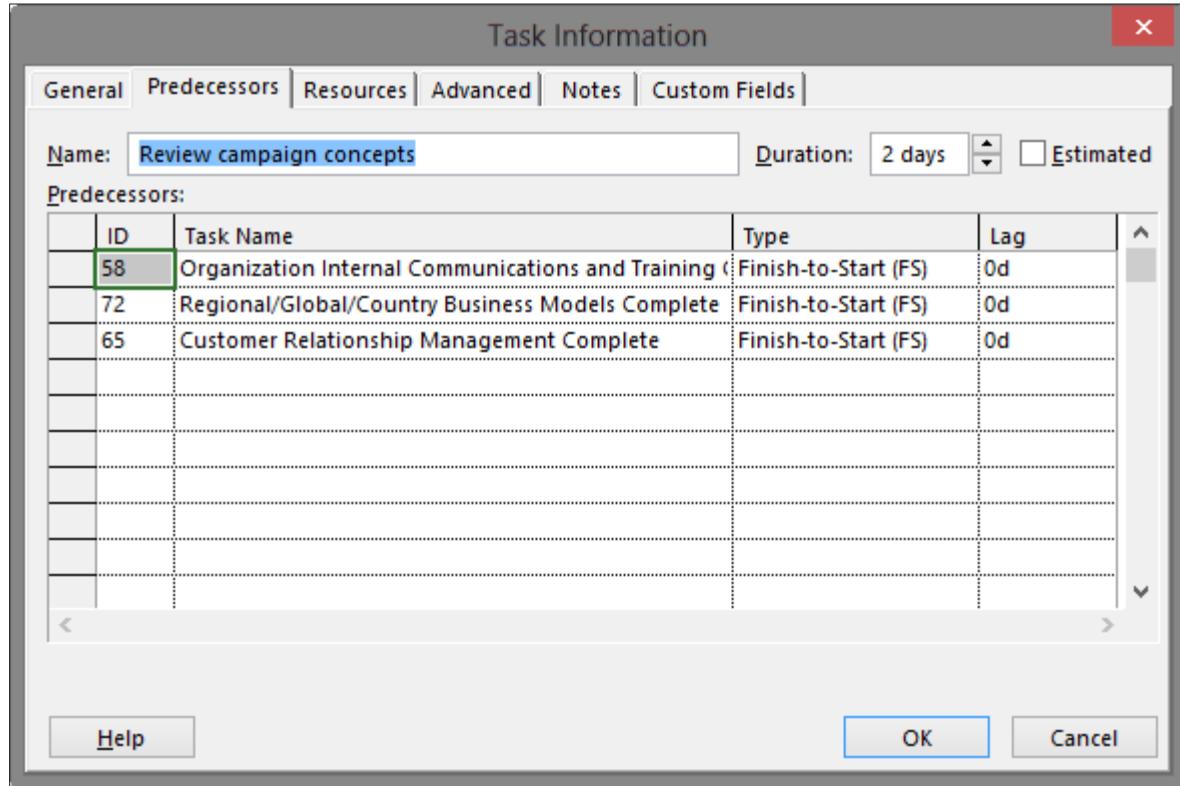


Figure 11-4 Predecessors Tab of Task Information Dialog Box

6. The most popular link scenarios for overlapping tasks are:

 - Finish to Start with negative lag
 - Start to Start
 - Finish to Finish
 - Start to Start with positive lag
 - Finish to Finish with negative lag

Creating a full overlap of tasks or partial overlap of tasks is a personal choice. Advisicon recommends you evaluate the risk to your schedule when deciding how much overlap is appropriate.



If the same resource is needed for both tasks, you may discover that a full overlap of tasks will overallocate the resource while a partial overlap may not.

There are some tasks where the risk would be lower if you do a partial overlap and get some progress underway on the predecessor task before starting the successor task. An example of this could be where you are creating the start of a model of a building slightly before you start the detailed architectural drawings. The model can be manipulated along the way and you will not have to lose all the work on the architectural drawings because the efforts are staggered.

Changing links may change the tasks on the critical path, be sure to watch for that.



7. Click **OK**.

Assign Additional Resources

1. In the **Format** tab, in the **Bar Styles** group, click the **Critical Tasks** checkbox. This will change the Gantt bar color from blue to red for critical tasks. Since the critical tasks drive the end date of your project, it is useful to have them visible.
2. Locate the task you want to shorten.
3. Double-click the task. In the **Task Information** dialog box, click the **Advanced** tab and ensure the task is set to **Fixed Work**.



Warning – Assigning additional resources will only shorten Task Duration on **Fixed Work** tasks. It will not have any impact on **Fixed Duration** tasks.

4. In the **Task Information** dialog box, click the **Resources** tab.

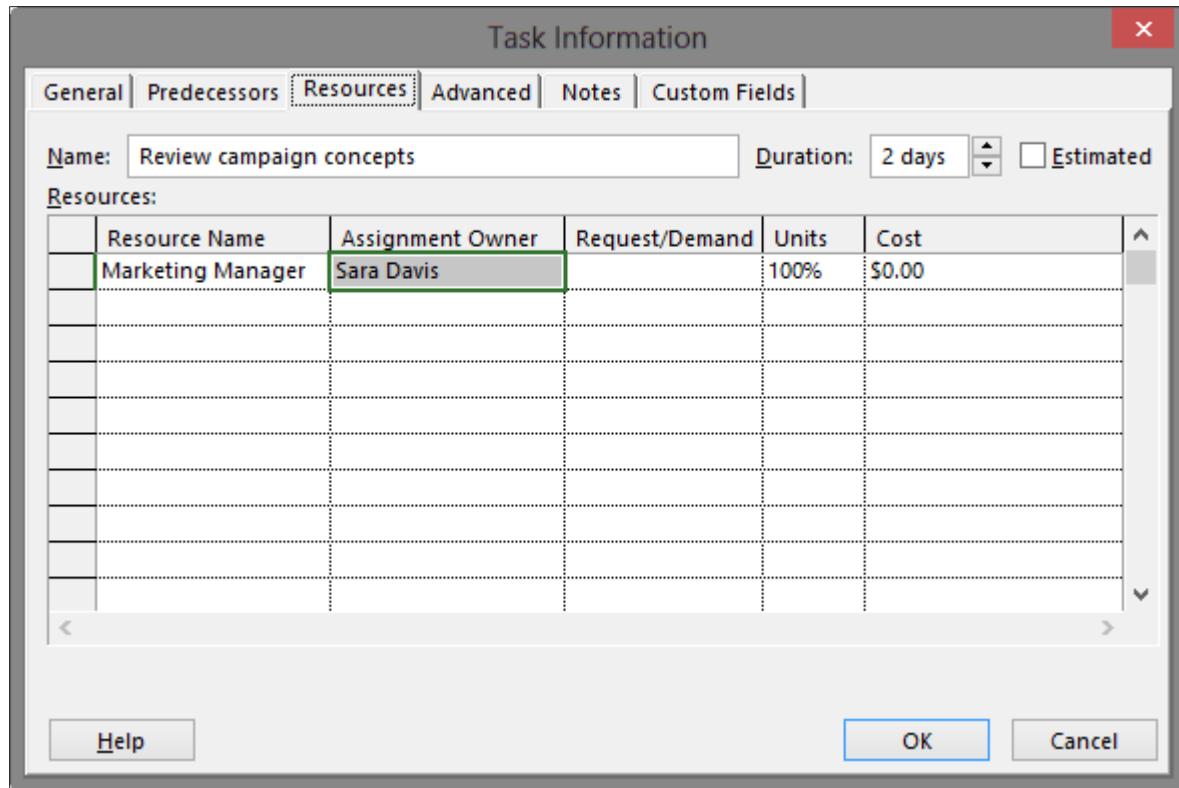


Figure 11-5 Resources tab in the Task Information Dialog Box

5. In the **Resource Name** column, in the first blank row, click the drop-down arrow and click the desired resource name and then click **OK**.
6. The task duration will automatically recalculate.

Getting Final Schedule Approval

Your schedule is ready for final approval when it has been fully planned, resources have been assigned, and any overallocations or missed deadlines have been resolved. Since you have resolved all of the schedule issues, you now have a schedule which has a high probability of being fully executed by the team. Prior to getting started, you should have your final schedule approved.

Most schedules have a sponsor who is funding the project. The sponsor is typically the person who will be receiving the benefits of the project. Some organizations also have a committee or member of the project management office (PMO) who signs off on a schedule before the project gets started.

Receiving approval of the schedule from the sponsor before getting started will ensure there is initial agreement on the plan going forward.

At Advisicon, we recommend that you implement a formal schedule approval process before executing your project. This will allow time for a review of the schedule, time to make changes to the project, and time for a final approval all before any work has started and before funds have been spent on the execution of the project.

Setting a Baseline

An important step when moving a schedule from planning to execution is capturing a baseline. In this section, we will provide a definition and purpose for the baseline, describe what happens when you capture a new or modified baseline, and illustrate how that information is used in scheduling.

What is a Baseline?

A **baseline** is a snapshot of your schedule after it has been planned and approved. A baseline is a way to record planned information about dates, timeframes, costs, and planned work.

If you do not capture a baseline, planned information will always be equal to current information and your schedule will portray itself as always perfectly planned and on schedule.

A schedule that is not baselined may also appear to still be in development. Project managers typically capture a baseline to signal to the project team that work is ready to begin.

Effects and Benefits of Setting a Baseline

Most project managers want to evaluate how the project plan is being executed by the team and how required schedule changes have altered the original plan. The quickest and simplest method to use Project Pro to illustrate variances between the original plan and the current plan is by setting a baseline before you start work.

Setting a baseline automatically keeps an original plan that can be displayed in a number of built-in views, such as Tracking Gantt view (shown below). As soon as the schedule shows progress, any variances will be displayed in those views.

Baseline information will remain frozen and will maintain values which can be compared against your schedule (most schedules fluctuate as work is performed and conditions in the project change). By setting a baseline, you are letting the software capture a copy of the data within specified columns at a point in time.

Five task columns are copied when you set a baseline: Start, Finish, Duration, Cost, and Work. The copied columns are maintained within the same schedule, in columns labeled with a “baseline” prefix such as Baseline Start. Project Pro uses these specific columns to calculate schedule variance during tracking.

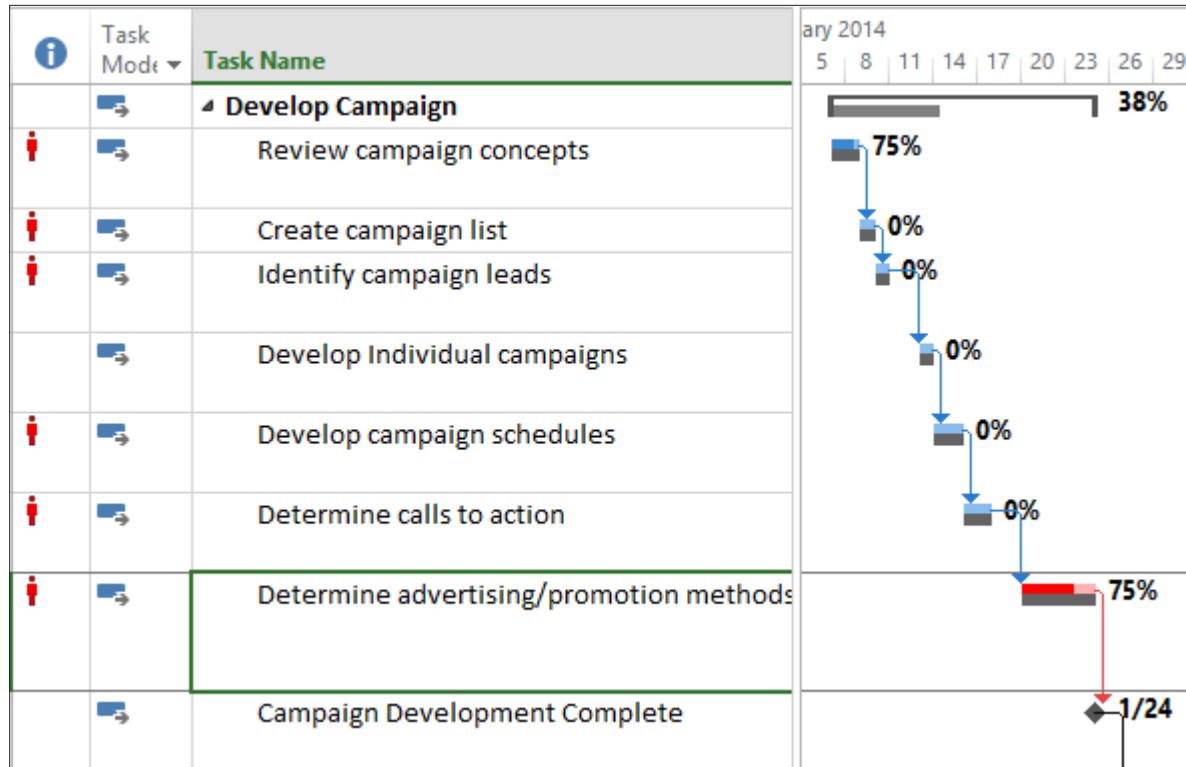


Figure 11-6 Tracking Gantt View with Baseline and Actual Task Status

Besides offering the advantage of comparison, setting a baseline is also the way Project is able to conduct earned value analysis. By default, information stored in the Baseline and information captured through the Status date and % Complete fields calculate the earned value of a task. **Earned value** analysis is a respected project management method for evaluating schedule and cost performance. Earned value analysis can provide solid metrics that can drive business decisions on the uncompleted portions of the schedule.



For more information on earned value and costing, see Advisicon's book *Advanced Scheduling with Microsoft Project*.

Setting a Baseline for the Entire Project

Organizations that want to use Project for tracking will need to set a complete baseline for the entire project at least once during the project. A complete baseline means you are capturing baseline information for every task in the schedule. Baseline information along with the current schedule information is visible in several tracking views.

As a best practice, you should set a baseline before approving task updates from team members in PWA.



To set a baseline in Project Pro:

1. If needed, click **Check Out** on the status line to change the schedule to read-write mode for editing.
2. In the **Project** tab, in the **Schedule** group, click the **Set Baseline** dropdown and then click **Set Baseline**.

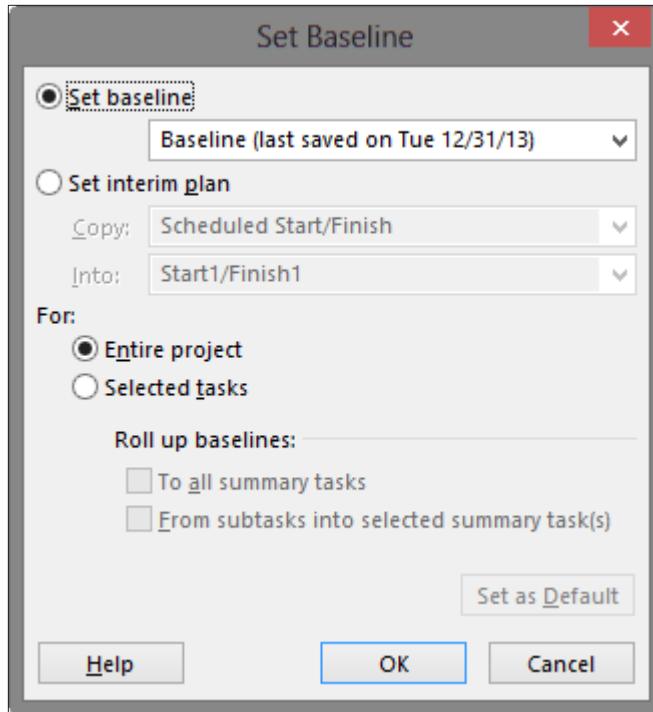


Figure 11-7 Set Baseline Dialog Box

3. In the **Set Baseline** dialog box, click **OK** to accept the default settings.

To view the baseline in Project Pro:

1. In the **Task** tab, in the **View** group, click the **Gantt Chart** dropdown and click **Tracking Gantt**.

To set a baseline in PWA:

1. If needed, check out the schedule for editing. In the **Project** tab, **Project** group, click **Edit**.
2. In the **Task** tab, in the **Editing** group, click the **Set Baseline** dropdown, click the **Set Baseline** sub menu dropdown, and click the desired option. Watch the status message in the upper right corner to confirm the baseline was set.

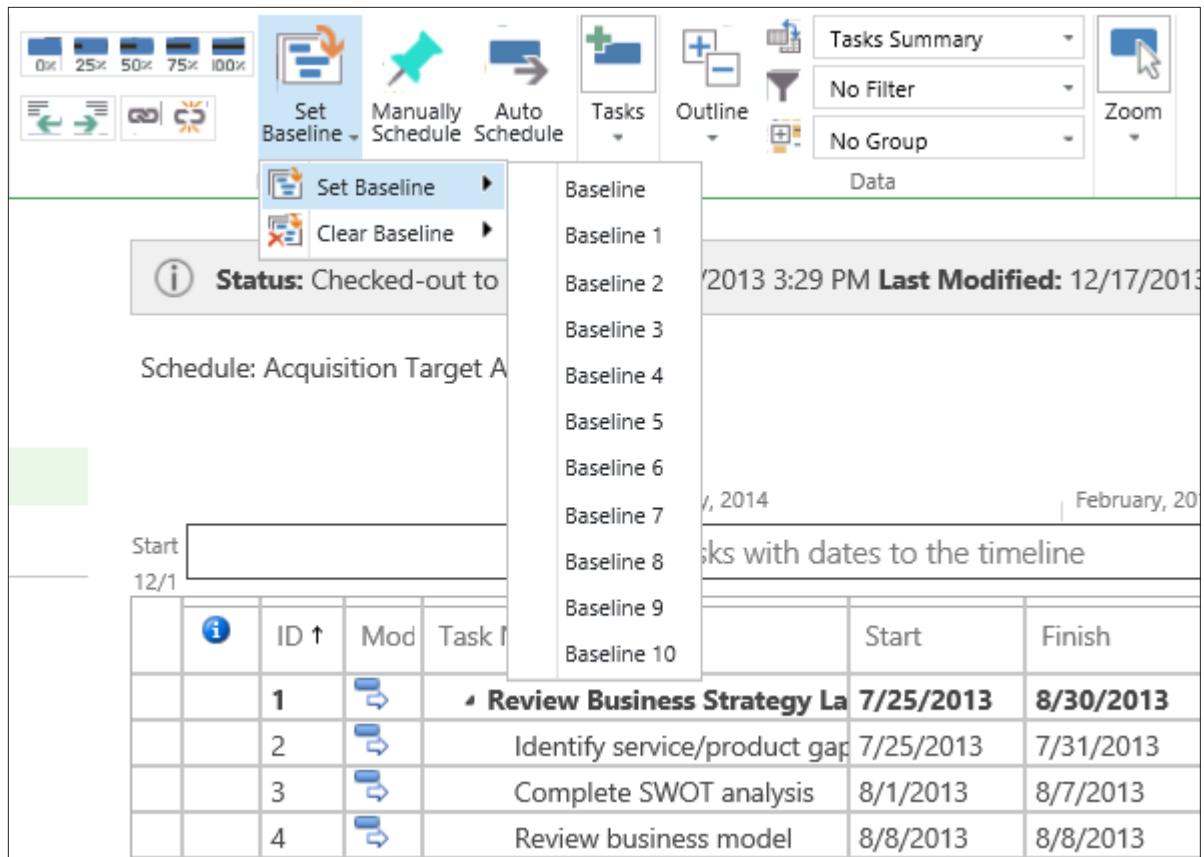


Figure 11-8 Set Baseline Option in PWA

To view a baseline in PWA:

3. Task tab, in the Data group, click the **Views** dropdown, and click **Tasks Tracking**.

Project Server has a feature called **Protected Baselines**.

Project managers by default are only given the ability to set the default Baseline (sometimes referred to as Baseline 0) and Baselines 6-10. Baselines 1-5 are reserved for Administrators.



When to Set a New Baseline

As a baseline is used for capturing a schedule at a specific point in time, you can continue to use the same baseline as long as the information related to the original schedule remains the same. If the original schedule information is no longer relevant for comparison, you have the option to overwrite the original baseline or set a new baseline. Project Pro allows up to 11 different baselines per schedule. You can also set partial baselines for selected tasks. A partial baseline will use up one of the 11 available baselines but it will only contain information for selected tasks.

The default baseline is labeled **Baseline**, while all alternate baselines have a number in their name, such as **Baseline 1**, **Baseline 2**, etc. Any time you accept the default settings when setting a baseline, you are using **Baseline**.



Warning - Setting a baseline using default settings automatically overwrites the existing **Baseline**. This could overwrite historical information that you may desire later for comparison purposes.

One reason why the original baseline may no longer be valid is due to changes in scope. Scope changes may make a portion of the schedule (or the entire schedule) irrelevant.

Other reasons organizations use for setting a new baseline include setting historical reference points (such as yearly records), or completion of a project phase.



You should use an alternate baseline (baseline 1-10) to have a historical record of a version of your baseline. If you need more than 10 alternate baselines, you can use the option to **Set Interim Plan**, available within the **Set Baseline** dialog box, which provides 10 additional opportunities to capture historical information.

Alternate baselines are provided as a benefit to the project manager who would like to capture versions of baseline information when the scope of the schedule changes. For example, a project manager could use **Baseline 1** to capture changes related to the first scope change and use **Baseline 2** to capture changes related to the second scope change.

Best practice suggests only setting new baselines for scope changes when these changes have gone through an approval process such as a committee or executive sponsor.



Failure to follow an approval process may allow all changes to alter the complete baseline, making the baseline no longer a valid measure for planned versus actual progress.

Some project managers set a baseline when they have been assigned a new project that is currently in progress. This allows them to track only new variances since receiving the schedule.

To set a new baseline for selected tasks:

1. Select the tasks you want to update including all affected future tasks.
2. In the **Project** tab, in the **Schedule** group, click the **Set Baseline** dropdown and then click **Set Baseline**.
3. In the **Set Baseline** dialog box, in the **For:** section, click **Selected Tasks**.

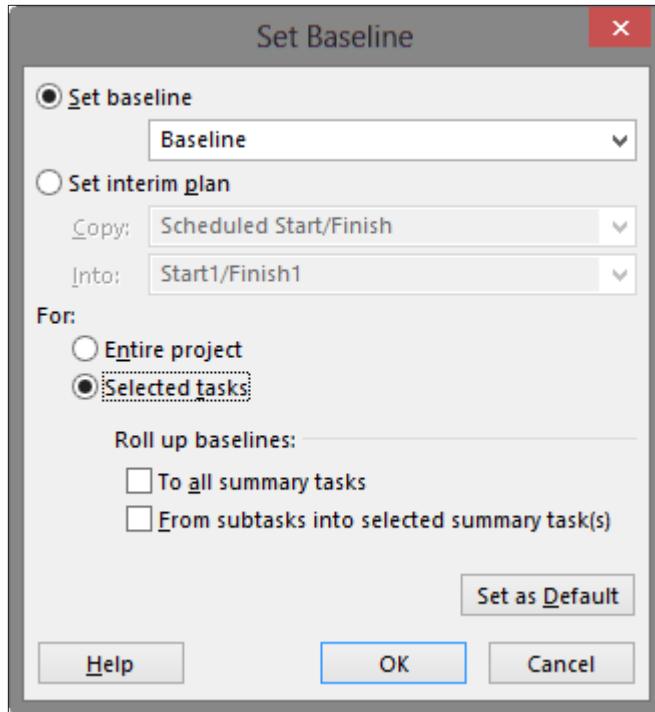


Figure 11-9 Set Baseline Dialog for Selected Tasks

4. If desired, in the **Roll up baselines:** section, you have two options:
 - Click the **To all summary tasks** check box
 - Click the **From subtasks into selected summary task(s)** checkbox
5. Click **OK**.

To set a new baseline for the entire project:

- Follow the steps from *Setting a Baseline for the Entire Project* on page 229.



Pay attention to any dialog boxes that appear related to overwriting baseline information. The only way to recover an overwritten baseline is to immediately catch it with undo.

The Tracking Gantt view displays the default **Baseline** information against the actual. To replace with an alternate baseline, such as **Baseline 1**, you will need to customize the view.



PWA only allows you to set complete baselines for the entire project. If you need to set a baseline or update a baseline for selected tasks, you must use Project Pro.



Key Points to Remember

- Overallocated resources occur when a resource is assigned more work than available in a given day.
- Moving a task in Gantt Chart view or Team Planner view is a popular method to solve a resource overallocation.
- Tasks on the critical path determine the end date of the project. Only by adjusting these tasks will the project end date be sooner.
- Overlapping tasks partially or fully is a popular method to shorten the project.
- Assigning additional resources will only shorten the duration of Fixed Work tasks.
- The schedule should be formally approved before setting a baseline.
- Setting a baseline saves a copy of specific columns of information at a specific point in time.
- The baseline can be updated partially or completely due to scope change.
- Setting a baseline in PWA should only be done when you want to capture a complete baseline for the entire project.



Chapter 12

Managing Project Manager Preferences

Overview

Upon completion of this chapter, the participant will be able to:

- Discuss the benefits of using preferences to optimize the use of Project Server by configuring PWA and Project Pro options.
- Describe the purpose of the cache and queue.
- List the steps to clear the local cache.
- Monitor the queue and review jobs in progress.
- Configure personal and resource alerts and reminders.

Optimizing Through Preferences

Project managers will reduce frustration by becoming familiar with how Project Server processes information and how that affects the visibility and speed of changes. Project managers will save time by optimizing the project environment to suit personal preferences. In *Managing Project Manager Preferences* we will provide insight into how project managers can gain control within Project Pro and PWA by displaying and setting various options.

Managing the Cache

A feature that helps ensure high performance and data reliability is the cache. The cache is available locally in Project Professional (aka, Project Pro) and is a temporary storage location for data until Project Server has completed the synchronization between Project Pro and Project Web App (PWA).

Overview of Caching

Caching occurs by storing information on a local machine first before exchanging information with the server. Since Project Pro is operating in a connected mode, caching provides a way to quickly open recently retrieved schedules and a way to save changes to schedules locally and synchronize that information with PWA at a later time.

Using a local cache allows a project manager to save schedules and avoid lengthy time delays. It also ensures that even if there is a failure to connect or an interruption in the connection with PWA the information will not be lost since it is still maintained in the local cache. When the connection is reestablished, the local cache can be synchronized.

Synchronization with PWA ensures that the changed information from the local cache is available when retrieving files from the server, only the changed information is passed to the local cache. Synchronization of changes also saves server processing time, ensures reliability of data, and reduces wait times for the end user.

Clearing the Local Cache

Information about the local cache can be displayed, monitored and modified. Within the local cache, you can control which projects are taking up hard drive space in Project Pro. In order to improve performance of Project Pro or if you would like to remove projects that you no longer need from the cache, you can clear the local cache.

To clear the local cache:

1. Open Project Pro.

You should keep all of your projects closed so they are not modifying the cache that you are planning to clear.



2. From the **File** tab, click **Options**.
3. In the **Project Options** dialog box, select **Save**.
4. In the **Cache** section, click **Clean Up Cache**.

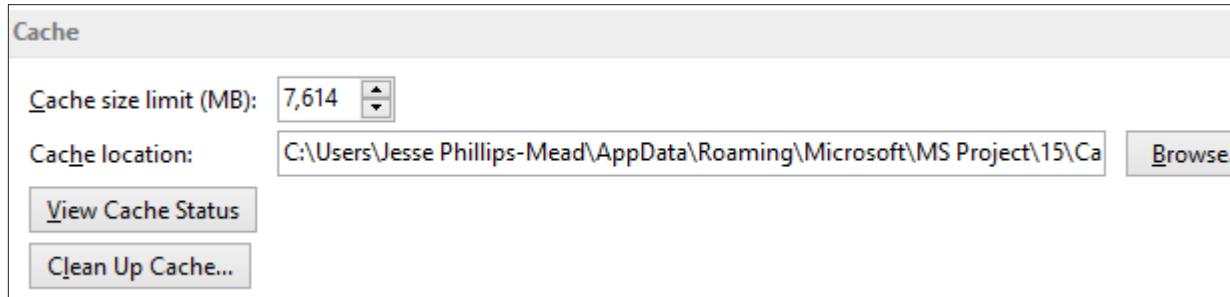


Figure 12-1 Cache Options on the Save Tab of Project Option

If the **Clean Up Cache** button is unavailable, you are running Project in desktop mode (computer profile). You need to restart Project and select the profile that connects Project Pro to PWA.



5. In the **Clean Up Cache** dialog box, in the **File Name** column select the desired project(s) and click **Remove From Cache**.
6. Click **Close**.
7. Click **OK**.

Factors Affecting Performance

There are several areas to consider that may affect application performance. Optimizing performance by working with the cache improves processing speed in projects that will require frequent saving or changing.

Below are some tips to ensure you are following best practices when it comes to cache settings or cache management.

- Auto saving single or multiple projects at once utilizes cache space. You may want to consider turning auto save off.
- Too small of a limit on cache size may decrease performance when working with multiple projects. You may want to increase the size of the cache.
- Old information in the cache may occupy valuable space. You may want to schedule a regular cleanup of the cache to remove unused projects.



Caching is a useful feature when there is one person functioning as the project manager and that is the only person who will be opening the schedule in Project Pro. If other people are editing the schedule in Project Pro, your local cache will be out of sync with the most recent copy and it will take time to update it next time you open it.

Managing the Queue

Project Server uses the queue service to line up work requests that are waiting until the server becomes available to act on the request. This functionality works very much the way a print queue works and improves the performance of Project Server. The Project Queuing System provides reliability, scalability and manageability by better utilizing server resources.

The Project Server Queuing System can hang on occasion for many reasons. This requires some administration know-how in order to resolve these stuck jobs and is beyond the scope of this book.



Overview of Queue Service

A queue is a waiting line that becomes a necessity when the number of service requests becomes greater than the optimum serving capacity. The following are examples of when a queue may be needed:

- In an organization, at the end of the workday on Friday, nearly all 300 employees submit their timesheets.
- A few hours before their team status meeting, nearly all project managers publish their projects.

The purpose of the Project Server Queuing System is to handle these kinds of changes consistently. The Queuing System takes all the users' input, records entries for the requests in Microsoft SQL Server, and then processes the data asynchronously on a first-come, first-served basis. The Queuing System ensures that Project Server works reliably when there is a sudden upsurge in demand.

The following jobs in PWA go through the Project Server Queuing System:

- Project Save
- Project Publish
- Timesheet Save
- Timesheet Submit
- Project Backup/Recovery
- Report Data Service operations
- Cube Building Service operations
- Server Side Scheduling (and node-consistency processing)

If a project manager expects that there may be issues in the Project Server Queuing System, they should consult with their administrator to troubleshoot queue settings.

How to view the Queue:

1. In the **Quick Launch** menu, click **Server Settings**.
2. In **Personal Settings**, click **My Queued Jobs**.



Personal Settings
[Manage My Alerts and Reminders](#)
[Manage My Resources' Alerts and Reminders](#)
[My Queued Jobs](#)

Figure 12-2 Personal Settings List of Options

3. Any jobs in process will be listed.

Managing Alerts and Reminders

You can set alerts and reminders for upcoming and overdue tasks and status reports in PWA. These alerts and reminders are email-based notifications that are established on the settings defined in PWA.

The ability to receive e-mail notifications from PWA is controlled by your administrator. You should consult your administrator if alerts and reminders are not being received.



There are two types of notifications:

Alerts – you can set alerts to receive email notification immediately when some action has occurred with your task or status report. Task alerts are sent immediately. For example, you can turn on alerts that will notify you when you receive a new task assignment, or when you receive a new status report request.

Reminders – you can configure reminders to receive email notification when attention is needed on tasks and status reports. Reminders are based on conditions, and are sent according to a recurrence schedule that you define, such as every three days. Task reminders are sent daily via e-mail at a time set by the administrator. For example, you can set up a reminder that will notify you a day before a status report is due.

Managing Personal Alerts and Reminders

A personal alert or reminder is a section of PWA that is controlled by the individual. Personal alerts and reminders can be set for task and status reports by using the Personal Settings page on PWA.

To configure personal alerts and reminders:

1. In the **Quick Launch** menu, click Server **Settings**.
2. In **Personal Settings**, click **Manage My Alerts and Reminders**.

Manage My Alerts and Reminders ®

Use this page to receive email notifications when there are changes to your tasks and status reports. To change the email address, contact your server administrator.

Email address:

Tasks
Create task alerts and reminders to help you work better.

Task Alerts

Alert me immediately when:

I receive a new task assignment in my projects
 My project tasks are modified

Task Reminders

Send me a reminder before my tasks start. Amount of time before sending the reminder: 1 Days
 Send me a reminder before my tasks are due. Amount of time before the task is due to send the reminder: 1 Days
 Continue to send reminders until my tasks are completed or they become overdue. Send the reminders: Every Day
 Send me a reminder about my incomplete tasks. Send the reminder: Every Day
 Send me a reminder when my tasks are overdue. Amount of time a task is overdue before sending the reminder: 1 Days
 Continue to send reminders until my tasks are complete. Send the reminders: Every Day

Status Reports
Create alerts and reminders to help you submit timely status reports.

Status Report Alerts

Alert me immediately when:

I receive a new status report request

Status Report Reminders

Send me a reminder before my status reports are due. Amount of time before the status reports are due to send the reminder: 1 Days
 Send me a reminder when my status reports are overdue. Amount of time the status reports are overdue before sending the reminder: 1 Days
 Continue to send reminders until my status reports have been submitted. Send the reminders: Every Day
 Send me a reminder before my status reports are due. Amount of time before the status reports are due to send the reminder: 1 Days
 Send me a reminder when my status reports are overdue. Amount of time the status reports are overdue before sending the reminder: 1 Days
 Continue to send reminders until my status reports have been submitted. Send the reminders: Every Day
 Send me a reminder until my status reports have been submitted or they become overdue. Send the reminder: Every Day

Status Reports
Create alerts and reminders to help you submit timely status reports.

Status Report Alerts

Alert me immediately when:

I receive a new status report request

Status Report Reminders

Send me a reminder before my status reports are due. Amount of time before the status reports are due to send the reminder: 1 Days
 Send me a reminder when my status reports are overdue. Amount of time the status reports are overdue before sending the reminder: 1 Days
 Continue to send reminders until my status reports have been submitted. Send the reminders: Every Day
 Send me a reminder until my status reports have been submitted or they become overdue. Send the reminder: Every Day

Queue Job Failures
Create Queue Job failure alerts to be notified quickly about your failed queue jobs.

Queue Job Failure Alerts

Alert me immediately when:

Any of my Queue Jobs fails

Language Setting
Select the preferred language for receiving notification emails.

English - Text

Figure 12-3 My Alerts and Reminders

3. To set alerts for Tasks, configure the following:

- If you want to receive email notifications immediately upon the occurrence of specified events, in the **Task Alerts, Alert me immediately when:** section, select the appropriate checkboxes to set email alerts to be sent when you receive new task assignments and when your tasks are modified
 - If you want to receive email notifications at specified intervals, in the **Task Reminders** section, select the appropriate checkboxes to set email alerts to be sent before tasks start, before tasks are due, for incomplete tasks, and for overdue tasks. For each interval, specify the frequency.
4. To set alerts for Status Reports, configure the following:
 - If you want to receive email notifications immediately upon the occurrence of specified events, in the **Status Reports Alerts, Alert me immediately when:** section, select the **I receive a new status report request** checkbox to set email alerts to be sent when you receive a new status report request.
 - If you want to receive email notifications at specified intervals, in the **Status Reports Reminders** section, select the appropriate checkboxes to set email alerts to be sent when status reports are due, when your status reports are overdue, and when status reports are submitted or have become overdue. For each interval, specify the frequency.
 5. In the **Queue Job Failure Alerts** section, select **to be alerted of failed jobs** (refer to the section *Managing the Queue* on page 243 for a detailed explanation of this topic).
 6. In the **Language Setting** section, select the language and format that you want to use for your notifications.
 7. Click **Save**.

Managing Alerts and Reminders for Resources

Project managers can set up alerts and reminders for their resources. In this case, team members will receive both the project manager defined notifications and the notifications that they defined for themselves.

The section **My Team Member Tasks** is a feature that applies only to resources on projects you are the project manager or owner of. The section **My Resources' Status Reports** is a feature that only applies to resources you have created a new status report request for.

To configure alerts and reminders for resources:

1. In the **Quick Launch** menu, click **Server Settings**.
2. In **Personal Settings**, click **Manage My Resources' Alerts and Reminders**.

Chapter 12 Managing Project Manager Preferences

Manage My Resources' Alerts and Reminders [Help](#)

Use this page to receive email notifications when there are changes to your resources' tasks and status reports. To change the email address, contact your server administrator.

Email address:

My Team Members' Tasks

Create task alerts and reminders to help you work better. A team member refers to anyone assigned to tasks within a project that you own.

Task Alerts

Alert me when team members:

Submit New Tasks and Assignments
 Reassign Tasks
 Update Tasks

Task Reminders

Send a reminder before my team members' tasks are due. Amount of time before the task is due to send the reminder: Days

Send email to me
 Send email to my team members
 Send email to me and my team members

Send a reminder when my team members' tasks are overdue. Amount of time a task is overdue before sending the reminder: Days

Continue to send reminders until my team members' task is complete.
Send the reminders: Every Day

Send email to me
 Send email to my team members
 Send email to me and my team members

Send a reminder when my team members' task has been in progress but has no actual work. Send the reminder after: Days

Send email to me
 Send email to my team members
 Send email to me and my team members

My Resources' Status Reports

Create alerts and reminders to help you submit timely status reports. "My Resources" refers to anyone from whom you have requested a status report.

Status Report Alerts

Alert me when my resources:

Submit a status report

Status Report Reminders

Send a reminder before my resources' status reports are due. Amount of time before sending the reminder: Days

Send email to me
 Send email to my resources
 Send email to me and my resources

Send a reminder when my resources' status reports are overdue. Amount of time a report is overdue before sending the reminder: Days

Continue to send reminders until their status reports are submitted.
Send the reminders: Every Day

Send email to me
 Send email to my team members
 Send email to me and my team members

Language Setting

Select the preferred language for receiving notification emails:

English - Text

Figure 12-4 My Resources' Alerts and Reminders

3. To establish alerts for tasks assigned to your resources configure the following:
 - If you want to receive email notifications immediately upon the occurrence of specified events, in the **Task Alerts, Alert me when team members:** section, select the appropriate checkboxes to set email alerts to be sent when your resources submit new tasks and assignments, when your resources reassign tasks, and when your resources update tasks.
 - If you want to receive email notifications at specified intervals for upcoming tasks, in the **Task Reminders** section, **Send a reminder before my team members' tasks are due** section, select the appropriate option to set email alerts to be sent before tasks are due and have the alerts sent to only you, only to your resources, or both to you and your resources. You can also specify the number of days in advance of the due date for the upcoming task that the email notification is sent.
 - If you want to receive email alerts at specified intervals for overdue tasks, in the **Send a reminder when my team members' tasks are overdue** section, select the appropriate checkboxes to set email alerts. Select the appropriate option to set the alerts to be sent to only you, only to your resources, or both to you and your resources. You can also specify the number of days past the due date for the overdue task at which the alert is sent and the frequency at which reminder emails are sent until the task is complete.
 - If you want to receive email notifications at specified intervals for tasks that require updates, in the **Send a reminder when team members' task has been in progress but has no actual work** section, select the appropriate options to set email alerts to be sent when a task is started, but has not reported actual work, and have the alerts sent only to you, only to your resources, or both to you and your resources. You can also specify the number of days after the task has started that an alert is sent.
4. To establish alerts for your resource's status reports configure the following:
 - If you want to receive email notifications immediately when your resources send a status report, in the **Status Report Alerts, Alert me when my resources:** section, select the checkbox to set email alerts to be sent when your resources submit a status report.
 - If you want to receive email notifications at specified intervals for upcoming status reports, in the **Status Report Reminders, Send**

a reminder when my resources' status reports are due section, select the appropriate option set email alerts to be sent when a resource's status report is due and have the alerts sent only to you, only to your resources, or both to you and your resources. You can also specify the number of days in advance of the due date for the status report at which the alert is sent.

- If you want to receive email notifications at specified intervals for overdue status reports, in the **Status Report Reminders, Send a reminder when my resources' status reports are overdue** section, select the appropriate options to set email alerts to be sent when a resource's status report is overdue and have the alerts sent only to you, only to your resources, or both to you and your resources. You can also specify the number of days past the due date for the status report at which the alert is sent and the frequency at which reminder emails are sent until the status report is submitted.
5. In the **Language Setting** section, select the language and format that you want to use for your notifications.
 6. Click **Save**.

Key Points to Remember

- Capturing your Project Server environment preferences will streamline work and efficiencies will be gained.
- Caching enables quicker processing in synchronizations between Project Pro and PWA.
- If performance is lagging, a project manager can clear the local cache to free up processing space.
- Project managers should understand how the Project Server Queuing System works to be able to identify when there will be delays in refreshing of information.
- A project manager can set alerts and reminders for themselves and their team members for upcoming and overdue work. Team members can also set their own personal alerts and reminders for their tasks.



Appendix A

Advisicon Services and Training

About Advisicon

Advisicon delivers strategic project control solutions using advanced project and portfolio management methodologies, custom application development and consultative training.

Our clients throughout North America and Latin America have realized quantifiable results through our unique approach of combining knowledge transfer, optimization and sustainability of processes and technology while increasing stakeholder competencies.

Consulting and Training Services

- SharePoint & Business Intelligence Training & Consulting
- Project, Program and Portfolio Methodology & Technology Training
- Project Management Office (PMO) & Program Management Organizational Maturity Consulting
- Lifecycle management; organizational change and productivity solutions with integration consulting
- Assessments and optimization consulting for project and work management
- Microsoft® Project Desktop, Server, and Portfolio Server solution and integration consulting (all versions)
- Microsoft® SharePoint Services and Server solution and integration consulting (all versions)
- Dynamic project scheduling, program administration and staffing services and consulting
- Proprietary consultative technology and methodology training curriculum (public and customized)
- Business process and ERP system integration solutions and consulting (e.g. SAP, Dynamics, Lotus, IBM, Oracle)

- Custom Application Development (complex databases, integrations, reports, workflows and dash-views)

Microsoft Gold Certified Partner

Advisicon is Microsoft Gold Certified Enterprise Project Management Partner – Microsoft's highest partner ranking with competencies in Networking Infrastructure Solutions and Information Worker Solutions and an Enterprise Project Management Specialization.

Project Management Institute Global Registered Education Provider (REP)



Advisicon is a Global Registered Education Provider (REP) of the Project Management Institute (PMI). Our clients have confidence knowing that they have chosen an organization that is qualified to provide the highest level of project management training, and the convenience of receiving Professional Development Units (PDUs).

Knowledge Transfer

Advisicon consultants first learn the key business drivers to any successful solution. Simultaneously, Advisicon consultants teach clients to internalize and standardize project management best practices and use of technology. Clients receive task-specific coaching, in-depth process development, customized project management methodology and supervised training with the technology.

Optimization

Advisicon consultants integrate project management best practices and project management technologies to fit each client's organizational structure, strategy, goals and culture.

Sustained Results

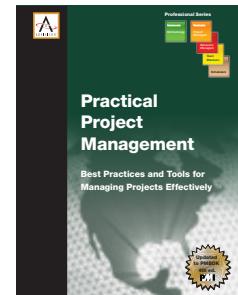
Through Advisicon's phased approach, our clients are able to adopt and implement strategic project management improvements one step at a time, growing from one level of project management maturity to the next. Through this process of optimization and knowledge transfer, Advisicon clients realize sustained results and scalable business options.

Training Programs

Advisicon Project Management Courses

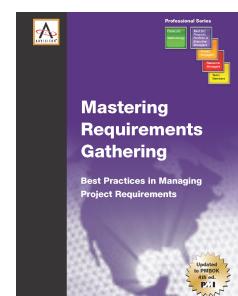
Practical Project Management

Learn how to manage projects from initiation to close-out. This practical course teaches participants how to successfully initiate, plan, execute, control and close-out projects applying industry best practices. Students will learn project management concepts, helpful standard terminology, and established methods based on the Project Management Institute (PMI®) Project Management Body of Knowledge (PMBOK®).

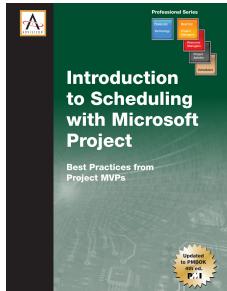


Mastering Requirements Gathering

Learn how to gather and manage project requirements successfully. This course teaches participants how to elicit, characterize, document, analyze, validate, verify and manage requirements for new projects, products and services. Participants will learn how to define and document high-level business requirements, identify user classes & representatives, select elicitation techniques, differentiate and prioritize functional & non-functional requirements from users, identify business rules, and review and verify requirements with stakeholders.

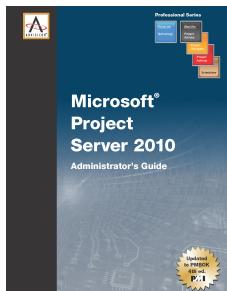


Advisicon Microsoft Office Project Management Technology Courses



Managing Projects with Microsoft Project

Learn how to use Microsoft Project to build, optimize and manage project schedules. This course teaches participants how to use Microsoft Office Project to successfully create, track, manage and modify project schedules and resource pools. Participants will learn how to apply best practices, tips and tricks to planning and managing projects with Microsoft Office Project.

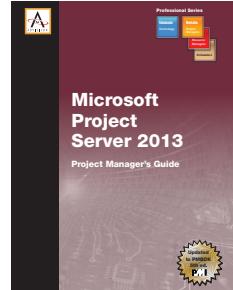


Microsoft Project Server 2010: Administrator

Learn how to configure, customize, administer and support Microsoft Office Project Server 2003 or 2007. Administrators will learn how to configure, customize and support Microsoft Office Project Server. This course trains participants to set up and support enterprise-wide project management standards, templates, resource pools, custom fields, management metrics and reporting, as well as how to manage Project Web Access.

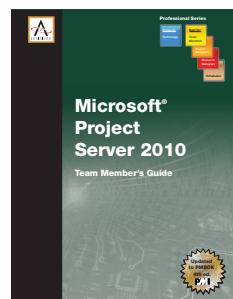
Microsoft Project Server 2013: Project Manager

Learn how to build, publish, and manage project schedules, issues, risks, deliverables, resources, and documents across an enterprise with Microsoft Project Server 2013. Project Managers will learn to build, track and manage project schedules with Microsoft Office Project Professional and publish them to Project Server, and how to track, analyze, and report on projects through Project Web Access.



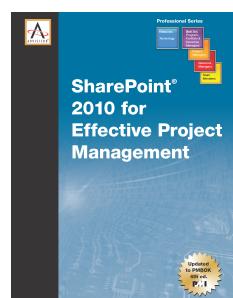
Microsoft Project Server 2010: Team Member

Learn how to use Microsoft Project Server 2010 to contribute to projects across an enterprise. This course trains participants how to update and manage project tasks, enter and report on risks, issues, documents and new tasks through Project Web Access.



Using SharePoint for Effective Project Management

Learn to use Microsoft Windows SharePoint Services to manage project team collaborate on projects. This course teaches participants how to design, create customize and use SharePoint to collaborate, share documents, communicate and coordinate project activities, deliverables, communications, risks, and issues.



Advisicon Flowcharts

Advisicon has created a very practical set of project management flowcharts to help project managers, PMOs, and project team members plan, collaborate, and track project activities more effectively.

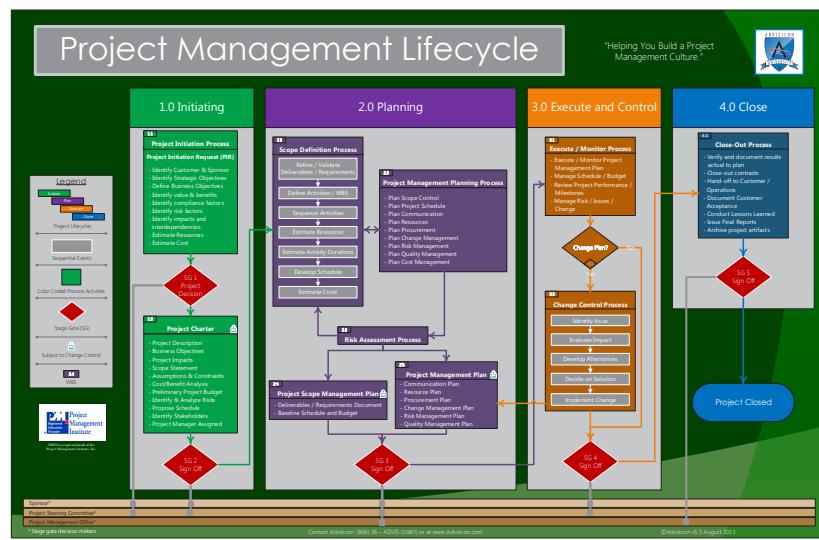
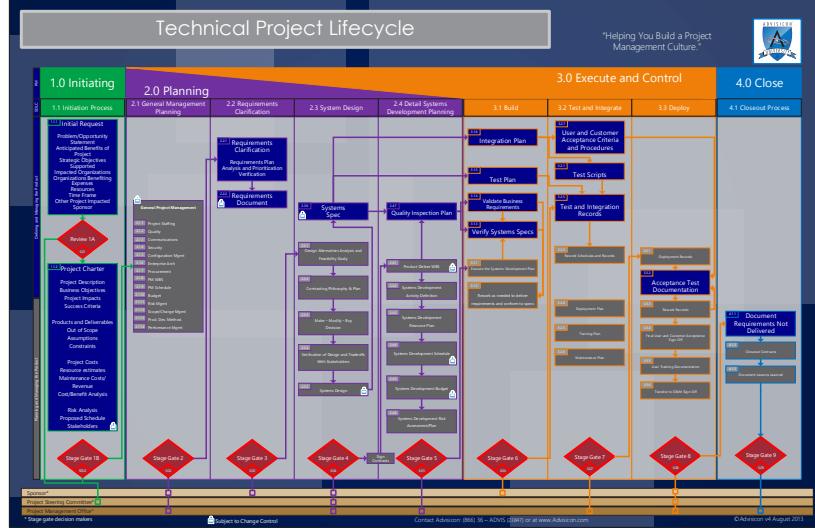
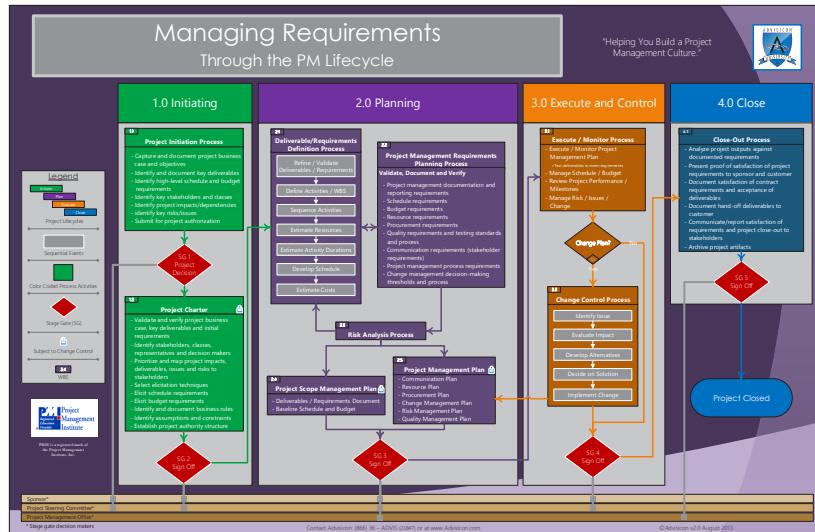


Figure A-1 Project Management lifecycle

**Figure A-2** Technical Project lifecycle**Figure A-3** Managing Requirements throughout the Project Management Lifecycle

Appendix A Advisicon Services and Training

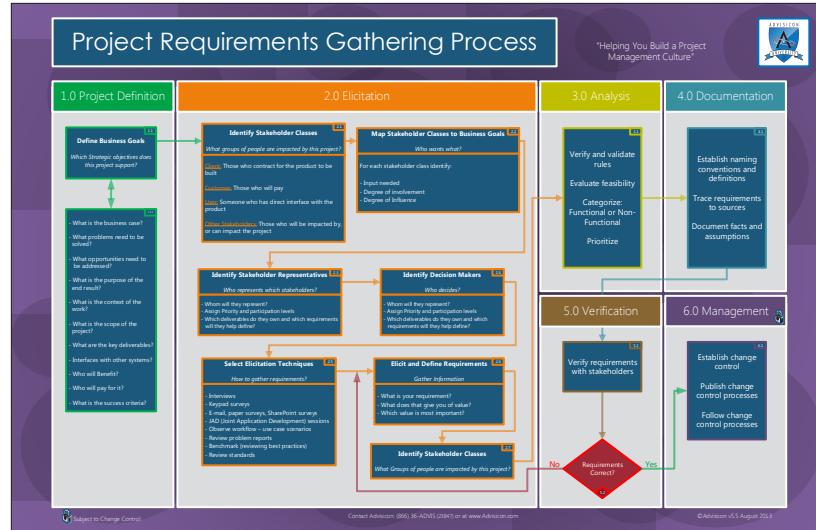


Figure A-4 Project Requirements Gathering Process

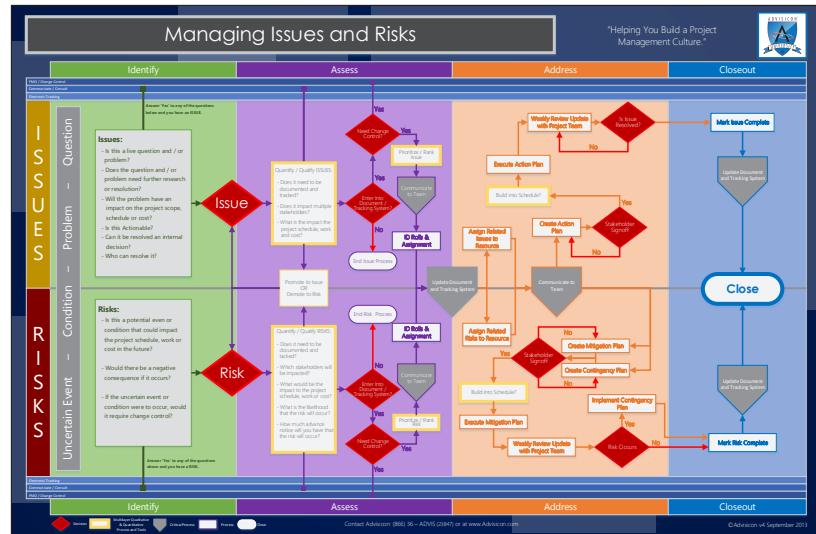


Figure A-5 Managing Issues and Risks

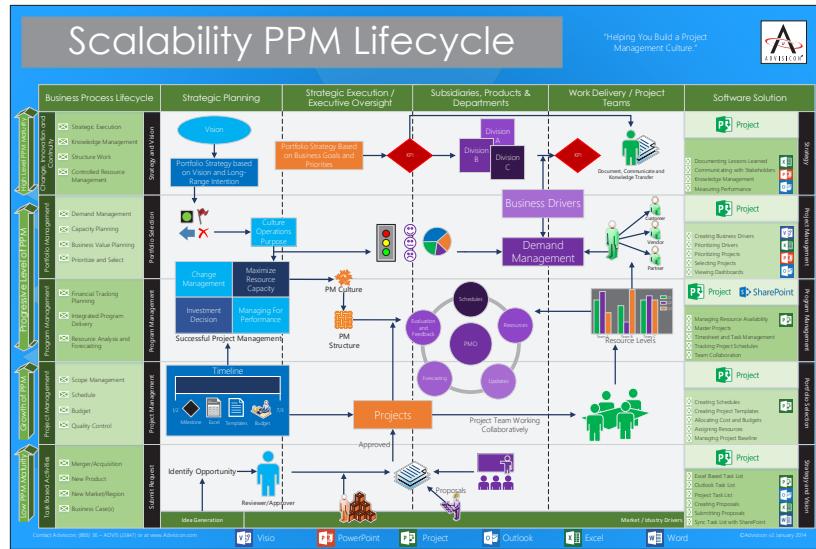
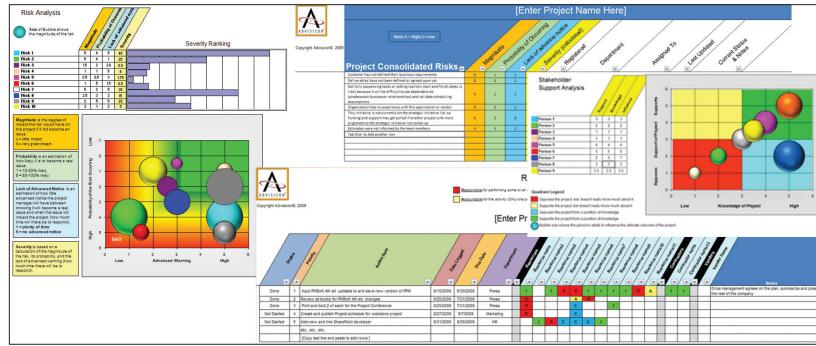


Figure A-6 PPM Lifecycle

Advisicon Project Management Tools

Advisicon has created Project Management Tools to help project managers, PMOs, and project teams standardize and apply project management best practices. These tools will provide valuable project insight and analysis and save you days and weeks of work. You don't need to reinvent the wheel! Get the tools you need to manage your projects more effectively today!

RACI Charts, Project Risk Register, Stakeholder Support Analyzer, and Risk Analyzer are just some of the tools we offer.



Optimization, Knowledge Transfer, and Sustained Results

www.Advisicon.com

Web Store: <http://store.advisicon.com>

email: Info@Advisicon.com

Toll free: 1.866.362.3847