# 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 2013 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 the “Security” chapter.

### 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, grouping 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:
2. What groups may want in their own views, fields, reports, dashboards and SharePoint Workspaces.
3. How many of these groups will have overlapping needs.
4. Identify what roles – stakeholders and stakeholder classes (Functional Groups) – there are:
5. Within groups there are typically roles (power users, administrators, end users, the PM’s resource or functional managers, executives.
6. Identifying roles will help you setup security, permissions, templates, etc. for faster care, feeding and management of Project Server.
7. How much integration do we need Project Server to have with other external systems?
8. ERP
9. Other databases
10. Business Intelligence reporting
11. Data warehousing
12. SharePoint
13. Demand management planning and forecasting:
14. Does our organization need to have detailed tasks for managing the daily/weekly work?
15. Are there Project Template Types (what kind of work is standard) that can be leveraged and automated?
16. Does the organization have an in-take process for mapping and planning incoming work?
17. Resource capacity and capability planning:
18. Identify the skillsets, and roles that apply to end users.
19. Review calendars and availability planning with max units.
20. Review overtime and work overallocation reporting.
21. Establish all custom fields for sorting, filtering, and grouping
22. i.e. Department, RBS, Primary Role, etc.
23. Cost planning and forecasting:
24. Establish base rate table for resources and leverage other cost rate tables as needed.
25. Establish fiscal year planning for reporting.
26. Create base cost for generic roles or burdened rate for planning.
27. Address materials or cost planning resources (travel, equipment, etc.).
28. Review task costs fields for fixed costs.
29. Business Intelligence reporting and dashboards:
30. Review what internal dashboards and views are covered and what customized views are needed.
31. Is there any integrated reporting needed for pulling in data from other systems?
32. New work portfolio management (selecting the right projects):
33. Define the key business intake or selection process that is being used now (Excel, SharePoint, other systems or tools).
34. Identify different business drivers to rank and age.
35. Rate, rank and establish measurement ranking criteria for business drivers.
36. Establish budgetary estimates for new proposed projects.
37. 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).
38. Discover if any new projects are dependent upon each other/
39. Automation, workflows and notifications:
40. Are there existing workflow operations that can be mapped and automated?
41. 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
2. Identify the online or on premise needs
3. Map out stakeholder needs
4. Identify reporting requirements
5. Create phased implementations to manage scope and deliver ROI the fastest
6. Environment setup or configuration
7. Create a pilot or proof of concept for pilot group of stakeholders
8. Configure and implement pilot findings to full production
9. Build templates, views, workflows and dashboard views
10. Train stakeholder groups in Project, SharePoint
11. Administrators
12. Project Managers
13. Team Members
14. Executives
15. Migrate or publish project schedules
16. Fine tune environment, views and projects
17. Project complete (phase 1)
18. Move to portfolio management and BI reporting or other system integrations (separate, but managed phases)