# 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 pre-defined 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.