

# Contents

<i>About the Author</i> .....	<i>xiii</i>
<i>About the Contributing Author</i> .....	<i>xiv</i>
<i>Introduction</i> .....	<i>xv</i>

## **Part One    Project Server Overview and Deployment Planning    ..... 1**

### **Chapter 1    Introducing Microsoft Project Server    ..... 3**

<i>Getting Started with Project Server</i> .....	<i>3</i>
<i>The Project/Project Server Workflow</i> .....	<i>7</i>
<i>Project Team Collaboration Tools</i> .....	<i>8</i>
<i>Advanced Analysis</i> .....	<i>9</i>
<i>Portfolio Modeling</i> .....	<i>10</i>
<i>Resource Tools</i> .....	<i>11</i>
<i>Choosing to Implement Project Server</i> .....	<i>11</i>
<i>The Benefits of a Project Management Tool</i> .....	<i>12</i>
<i>Configuring Project for Your Business</i> .....	<i>13</i>
<i>The Challenges of Moving to a Project Management Tool</i> .....	<i>15</i>
<i>Summary</i> .....	<i>16</i>

### **Chapter 2    An Implementation Framework    ..... 17**

<i>The Last Entry on the Administration Page</i> .....	<i>17</i>
<i>EIF Overview</i> .....	<i>19</i>
<i>EIF Trilogy</i> .....	<i>19</i>
<i>Enhancing the EIF</i> .....	<i>22</i>
<i>Summary</i> .....	<i>26</i>

## **Chapter 3    Requirements Gathering.....27**

<i>A Pilot: Your First Iteration .....</i>	<i>27</i>
<i>Determine Process Improvement</i>	
<i>Requirements and Goals .....</i>	<i>27</i>
<i>Determine Core Requirements .....</i>	<i>28</i>
<i>Define Training Requirements .....</i>	<i>35</i>
<i>Project Templates .....</i>	<i>36</i>
<i>Project Files .....</i>	<i>36</i>
<i>Define Noncore Requirements .....</i>	<i>36</i>
<i>Add System Design Information .....</i>	<i>37</i>
<i>Summary .....</i>	<i>41</i>

## **Chapter 4    Designing a Physical                   Deployment .....43**

<i>Choosing Hardware .....</i>	<i>43</i>
<i>Environment Requirements .....</i>	<i>44</i>
<i>Using Project and Project Server</i>	
<i>Across Low-Bandwidth Connections .....</i>	<i>44</i>
<i>Scaling Project Server Deployments .....</i>	<i>45</i>
<i>Strategizing Your Growth Path .....</i>	<i>50</i>
<i>Summary .....</i>	<i>51</i>

## **Part Two    Installation and Installation                   Troubleshooting ..... 53**

## **Chapter 5    Installing SharePoint                   Team Services and                   Project Server .....55**

<i>Before Beginning the Installation Process .....</i>	<i>56</i>
<i>Installation Preparation .....</i>	<i>57</i>
<i>Installing STS and Project Server .....</i>	<i>63</i>
<i>Postinstallation Steps .....</i>	<i>75</i>
<i>Verifying Project Server/STS Interoperability ...</i>	<i>80</i>
<i>Installing Project Professional .....</i>	<i>83</i>
<i>Installing SQL Decision Support Objects .....</i>	<i>84</i>
<i>Summary .....</i>	<i>84</i>

## **Chapter 6    Installation                   Troubleshooting ..... 85**

<i>Troubleshooting SharePoint Team</i>	
<i>Services Installation .....</i>	<i>85</i>
<i>Resolving Project Server Installation Issues ....</i>	<i>90</i>
<i>When You Can't Connect to Project Server</i>	
<i>Through the Browser .....</i>	<i>90</i>
<i>When Project Professional Doesn't</i>	
<i>Connect to Project Server .....</i>	<i>93</i>
<i>Uninstalling STS .....</i>	<i>96</i>
<i>Uninstalling Project Server .....</i>	<i>98</i>
<i>Backing Up and Restoring Project</i>	
<i>Server and STS .....</i>	<i>99</i>
<i>Summary .....</i>	<i>105</i>

## **Chapter 7    Advanced Installation                   Techniques ..... 107**

<i>Creating Multiple Project Server Instances .....</i>	<i>107</i>
<i>Understanding Registry Keys That Relate to Your</i>	
<i>Project Server Installation .....</i>	<i>121</i>
<i>Distributing Project Server Components .....</i>	<i>125</i>
<i>Restoring an STS Implementation to a</i>	
<i>Different Server .....</i>	<i>132</i>
<i>Summary .....</i>	<i>134</i>

## **Part Three Configuring Project Server for                   Your Organization ..... 135**

## **Chapter 8    Getting Started with Project                   Server Configuration ..... 137**

<i>Understanding Project Server's Language .....</i>	<i>137</i>
<i>Understanding Publishing in Project Server .....</i>	<i>139</i>
<i>Understanding Enterprise Global Concepts .....</i>	<i>139</i>
<i>Getting Familiar with the Project Web</i>	
<i>Access Administration Interface .....</i>	<i>144</i>
<i>Getting Familiar with Configuration Selections</i>	
<i>in Project 2002 Professional Edition .....</i>	<i>150</i>

<i>Understanding Custom Outline Codes and</i>	
<i>Custom Fields .....</i>	<i>152</i>
<i>Summary .....</i>	<i>165</i>

## **Chapter 9    *Configuring Project Server***

### ***Application Options .....167***

<i>Setting Options for Enterprise Features .....</i>	<i>169</i>
<i>Setting Options for OLAP and</i>	
<i>Resource Availability Tables .....</i>	<i>171</i>
<i>Setting Base URL Paths for Project Server .....</i>	<i>173</i>
<i>Configuring Project Web Access Menus .....</i>	<i>174</i>
<i>Configuring Tracking Method Settings .....</i>	<i>174</i>
<i>Configuring Gantt Chart Formats and</i>	
<i>Grouping Formats .....</i>	<i>179</i>
<i>Configuring Nonproject Time Categories .....</i>	<i>179</i>
<i>Setting Default Working Times for</i>	
<i>the Enterprise .....</i>	<i>180</i>
<i>Adding Simple Home Page Content and Links .....</i>	<i>182</i>
<i>Establishing Project Versions .....</i>	<i>183</i>
<i>Specifying User Authentication and</i>	
<i>Password Length .....</i>	<i>185</i>
<i>Managing Your Licenses .....</i>	<i>186</i>
<i>Summary .....</i>	<i>187</i>

## **Chapter 10   *Configuring Project***

### ***Server Security .....189***

<i>Global Permissions Essentials .....</i>	<i>190</i>
<i>Controlling Global Permissions (aka Features)</i>	
<i>Globally .....</i>	<i>190</i>
<i>Working with Permissions in Groups and</i>	
<i>Categories .....</i>	<i>194</i>
<i>Setting Permissions with Security Templates ....</i>	<i>200</i>
<i>Working with Categories .....</i>	<i>202</i>
<i>Understanding the Group/Category Cross-Connect .</i>	<i>207</i>
<i>Working with the Resource Manager Relationship .</i>	<i>208</i>
<i>All About User Accounts .....</i>	<i>209</i>
<i>Summary .....</i>	<i>211</i>

## **Chapter 11 Building an Enterprise Resource Pool ..... 213**

<i>The Importance of the Pool .....</i>	213
<i>Local vs. Enterprise Resources .....</i>	215
<i>Understanding Enterprise Resource Types .....</i>	215
<i>Your Resource Availability Decision Is Due .....</i>	216
<i>Setting Up Skill Codes and     Other Resource Keys .....</i>	217
<i>Opening the Resource Pool .....</i>	220
<i>Working with Individual Resources .....</i>	221
<i>Coalescing Your Resource Pool Input .....</i>	226
<i>Adding Resources from Active Directory or     Your Company Address Book .....</i>	227
<i>Verifying a Windows Account .....</i>	229
<i>Preparing Custom Field and Outline Code Data ...</i>	231
<i>Importing Resource Information .....</i>	232
<i>Completing the Pool Build .....</i>	236
<i>Summary .....</i>	236

## **Chapter 12 Establishing the Project Environment and Configuring Project Server Views ..... 237**

<i>Importing Projects .....</i>	237
<i>Controlling the Project Environment     with Templates .....</i>	242
<i>Determining Timesheet (Published) Fields .....</i>	244
<i>Building the Cube and Publishing     Resource Availability .....</i>	245
<i>Creating and Modifying Project Server Views ....</i>	248
<i>Adding Views Created Externally     to Your System .....</i>	263
<i>Summary .....</i>	264

<b>Part Four</b>	<b>Project Server in Production .....</b>	<b>265</b>
<b>Chapter 13</b>	<b><i>Building Project Plans and Project Teams .....</i></b>	<b>267</b>
	<i>Creating an Enterprise Project .....</i>	267
	<i>Opening and Closing Project Plans .....</i>	268
	<i>Taking Projects on the Road .....</i>	269
	<i>Building a Team .....</i>	270
	<i>Assigning Resources .....</i>	274
	<i>Leveling Resources .....</i>	275
	<i>Using the Resource Substitution Wizard .....</i>	277
	<i>Understanding Project Server Publishing .....</i>	283
	<i>Requesting Task Progress Outside the Normal Flow .....</i>	290
	<i>Summary .....</i>	291
<b>Chapter 14</b>	<b><i>Tracking Progress Through Project Web Access .....</i></b>	<b>293</b>
	<i>Working with Tasks in Project Web Access .....</i>	293
	<i>Understanding the Timesheet View .....</i>	295
	<i>Reporting Progress Through the Timesheet .....</i>	302
	<i>Using Other Timesheet Functions .....</i>	309
	<i>Applying Updates in Project Web Access .....</i>	317
	<i>Setting Rules for Accepting Task Updates .....</i>	323
	<i>Summary .....</i>	326
<b>Chapter 15</b>	<b><i>Working Collaboratively Through Project Web Access .....</i></b>	<b>329</b>
	<i>Using Features from the Project Web Access Home Page .....</i>	329
	<i>Working with Documents and Issues .....</i>	341
	<i>Modifying Issues Lists and Document Libraries ..</i>	350
	<i>Requesting and Responding to Status Reports ....</i>	358
	<i>Summary .....</i>	367

## **Chapter 16 Viewing and Analyzing Resource and Project Information .....369**

<i>Working in the Resource Center</i> .....	369
<i>Working in the Project Center</i> .....	374
<i>Summary</i> .....	399

## **Chapter 17 Managing Project Server .....401**

<i>Managing SharePoint Team Services</i> .....	401
<i>Checking in Enterprise Resources and Projects</i> ...	420
<i>Cleaning Up the Project Server Database</i> .....	422
<i>Permanently Removing a Resource</i> .....	423
<i>Renaming a Project</i> .....	424
<i>Monitoring Your Server</i> .....	429
<i>Summary</i> .....	431

## **Chapter 18 Customizing the Project Guide .....433**

<i>Introduction to the Project Guide</i> .....	433
<i>Components of the Project Guide</i> .....	433
<i>The Project Guide in Action</i> .....	435
<i>Project Guide Architecture</i> .....	438
<i>Customizing the Project Guide</i> .....	446
<i>Deploying Project Guides</i> .....	468
<i>Summary</i> .....	468

## **Index .....469**