

Microsoft® Office Project Server 2007

Portfolio Management Worksheet

Administrator Accounts		
1. Identify the administrator accounts.		
1.1. What account will be used to install Project Server?		
	Owner:	Due Date:
1.1.1. Will this account continue to be used as an administrator on the Project Web Access site?		
	Owner:	Due Date:
1.1.2. If using forms authentication, what account will be configured as administrator?		
	Owner:	Due Date:
1.2. What accounts will be configured as Farm administrators?		
	Owner:	Due Date:
1.3. Identify other administrators and accounts:		
1.3.1. Database		
	Owner:	Due Date:

1.3.2. Server Admin		
	Owner:	Due Date:
1.3.2.1. Web Server		
	Owner:	Due Date:
1.3.2.2. Application Server		
	Owner:	Due Date:
1.3.2.3. Database Server		
	Owner:	Due Date:
1.3.2.4. Line-of-business Server		
	Owner:	Due Date:
1.3.3. Active Directory		
	Owner:	Due Date:
1.3.4. Firewall		
	Owner:	Due Date:

1.3.5. Exchange		
	Owner:	Due Date:
1.3.6. Network		
	Owner:	Due Date:
Software Architecture		
2. Identify the server or servers that each tier will be installed to.		
2.1. Web server		
	Owner:	Due Date:
2.2. Application server		
	Owner:	Due Date:
2.3. Database server		
	Owner:	Due Date:
2.3.1. Are all databases and Analysis Services installed on the same server? If yes, what is the server name?		
	Owner:	Due Date:
2.3.2. If no, indicate how they are distributed		

2.3.2.1. Windows SharePoint Services		
	Owner:	Due Date:
2.3.2.2. Shared Services Provider (SSP)		
	Owner:	Due Date:
2.3.2.3. Draft		
	Owner:	Due Date:
2.3.2.4. Reporting		
	Owner:	Due Date:
2.3.2.5. Published		
	Owner:	Due Date:
2.3.2.6. Archive		
	Owner:	Due Date:
2.3.2.7. Analysis Services		
	Owner:	Due Date:
3. Identify other servers used in support of Project Server.		

3.1. Shared Services Provider		
	Owner:	Due Date:
3.2. Primary Domain Controller		
	Owner:	Due Date:
3.3. Backup Domain Controller		
	Owner:	Due Date:
3.4. Firewall		
	Owner:	Due Date:
3.5. Proxy		
	Owner:	Due Date:
3.6. Exchange		
	Owner:	Due Date:
3.7. SMTP		
	Owner:	Due Date:

3.8. Line of Business		
	Owner:	Due Date:
3.9. Other		
	Owner:	Due Date:
4. List operating system (include service pack) installed by tier:		
4.1. Application server		
	Owner:	Due Date:
4.2. Database server		
	Owner:	Due Date:
4.3. Web server		
	Owner:	Due Date:
4.4. Line of Business server		
	Owner:	Due Date:
4.5. Other		
	Owner:	Due Date:

4.6. Client		
	Owner:	Due Date:
	Owner:	Due Date:
Network Architecture		
1. What network authentication will be used, NTLM or Kerberos authentication?		
	Owner:	Due Date:
2. Will users access Project Server from the extranet?		
	Owner:	Due Date:
2.1. If yes, what extranet topology will be used?		
2.1.1. Perimeter in Proxy		
	Owner:	Due Date:
2.1.2. Back-to-Back Perimeter		
	Owner:	Due Date:
2.1.3. Tri-Homed Perimeter		
	Owner:	Due Date:

2.1.4. Split Back-to-Back		
	Owner:	Due Date:
Hardware Architecture		
1. What is the planned size of your server farm? (small, medium, large)		
	Owner:	Due Date:
2. Web Server specifications:		
2.1. RAM		
	Owner:	Due Date:
2.2. CPU		
	Owner:	Due Date:
2.3. Hard drive		
	Owner:	Due Date:
2.4. NIC		
	Owner:	Due Date:
3. Application Server specifications:		

3.1. RAM		
	Owner:	Due Date:
3.2. CPU		
	Owner:	Due Date:
3.3. Hard drive		
	Owner:	Due Date:
3.4. NIC		
	Owner:	Due Date:
4. Database Server specifications:		
4.1. RAM		
	Owner:	Due Date:
4.2. CPU		
	Owner:	Due Date:
4.3. Hard drive		
	Owner:	Due Date:

4.4. NIC		
	Owner:	Due Date:
5. Are all the servers in your Project Server deployment run from one central location?		
	Owner:	Due Date:
6. If no, identify additional locations.		
6.1. First Location		
	Owner:	Due Date:
6.2. Second Location		
	Owner:	Due Date:
6.3. Third Location		
	Owner:	Due Date:
7. Are some server functions combined onto a single machine, for example, are the web and application tiers on one server?		
	Owner:	Due Date:
8. Are other applications installed on the Web server?		

8.1. Anti-virus		
	Owner:	Due Date:
8.2. Other		
	Owner:	Due Date:
9. Are other applications installed on the Application server?		
9.1. Anti-virus		
	Owner:	Due Date:
9.2. Other		
	Owner:	Due Date:
10. Are other applications installed on the Database server?		
10.1. Anti-virus		
	Owner:	Due Date:
10.2. Other		
	Owner:	Due Date:

11. Do you have a plan to scale up?		
	Owner:	Due Date:
11.1. If yes, describe.		
	Owner:	Due Date:
12. Do you have a plan to scale out?		
	Owner:	Due Date:
12.1. If yes, describe.		
	Owner:	Due Date:
13. Are there any service level agreements that need to be noted?		
	Owner:	Due Date:
14. Fault tolerance:		
14.1. Mirrored disks?		
	Owner:	Due Date:
14.2. RAID 5 disks?		
	Owner:	Due Date:

14.3. Hot backup system?		
	Owner:	Due Date:
14.4. Warm back-up system?		
	Owner:	Due Date:
14.5. Database journaled?		
	Owner:	Due Date:
14.6. SAN storage?		
	Owner:	Due Date:
User Interface		
1. What is the anticipated number of Project Professional users?		
	Owner:	Due Date:
2. What is the anticipated number of Project Web Access users?		
	Owner:	Due Date:
3. Is Terminal Server going to be used for users who are accessing Project Server from outside the firewall?		
	Owner:	Due Date:
Security		

<p>1. Will Windows authentication be used?</p>		
	Owner:	Due Date:
<p>2. Will forms authentication be used?</p>		
	Owner:	Due Date:
<p>2.1. What membership store will be used?</p>		
	Owner:	Due Date:
<p>3. Will both types of authentication be used?</p>		
	Owner:	Due Date:
<p>3.1.1. If yes, what is the scheme for the Windows authentication URLs?</p>		
	Owner:	Due Date:
<p>3.1.2. If yes, what is the scheme for the forms authentication URLs?</p>		
	Owner:	Due Date:
<p>3.2. Is Secure Sockets Layer (SSL) being used for client to server transactions?</p>		
	Owner:	Due Date:

<p>3.3. Is IPsec being used for server to server transactions?</p>		
	Owner:	Due Date:
<p>4. Will any servers have particular security rules or templates applied?</p>		
	Owner:	Due Date:
<p style="text-align: center;">Configuration</p>		
<p>1. Will Project Workspaces be allowed to be created for each Project in Windows SharePoint Services?</p>		
	Owner:	Due Date:
<p>1.1. Will there be size restrictions or quotas placed on the size of Project workspaces?</p>		
	Owner:	Due Date:
<p>1.2. Will customization of Project workspaces be allowed?</p>		
	Owner:	Due Date:
<p>2. Will customization of Project Web Access be allowed?</p>		
	Owner:	Due Date:
<p>3. Will timesheets be used?</p>		
	Owner:	Due Date:

3.1. Are there peak times for updates that should be noted?		
	Owner:	Due Date:
4. Will notifications and reminders be used?		
	Owner:	Due Date:
5. Will online analytical processing (OLAP) cubes be generated?		
	Owner:	Due Date:
6. Will custom fields be used?		
	Owner:	Due Date:
7. Will any Project groups need to be synchronized with Active Directory?		
	Owner:	Due Date:
8. What languages will be supported?		
	Owner:	Due Date:
9. Will you be creating SharePoint sites other than the Project workspaces?		
	Owner:	Due Date:

10. If yes, will there be any restrictions to note (for example, customization, size limit, number of users)?	
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