

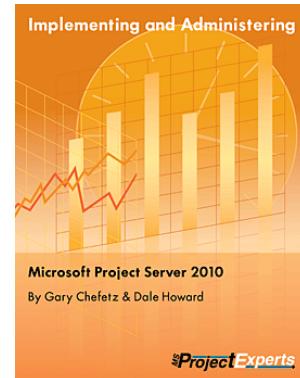
This is a sample chapter from:

# Implementing and Administering Microsoft Project Server 2010

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**MODULE 05: POST-INSTALLATION CONFIGURATION  
PROJECT SERVER 2010 (BETA)**



**msProjectExperts**

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## Module Number 05

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# Post-Installation Configuration

### ***Learning Objectives***

After completing this module, you will be able to:

- Configure Excel Services and PerformancePoint Services for your new Project Server site
- Configure Secure Store Services for Reporting
- Install the SQL Server Native Client and Analysis Management Objects
- Tune SQL Server for best performance
- Verify Project Server Functionality

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# Configure SharePoint Service Applications

Now that you have completed the installation procedure in Module 4, you have all the software parts in place where you need them. The next step is to wire them all together so that they can interact with one another as a complete system. For instance, you created a Global Group for Report Authors during the server preparation steps in the previous module, but you now need to connect that global group to the *Reporting Database* in Project Server, something you couldn't do until you created a Project Server 2010 site on your system. Much of your work in this module involves making that type of connection between the various software components.

## Configure PerformancePoint Services for Your Project Server Site

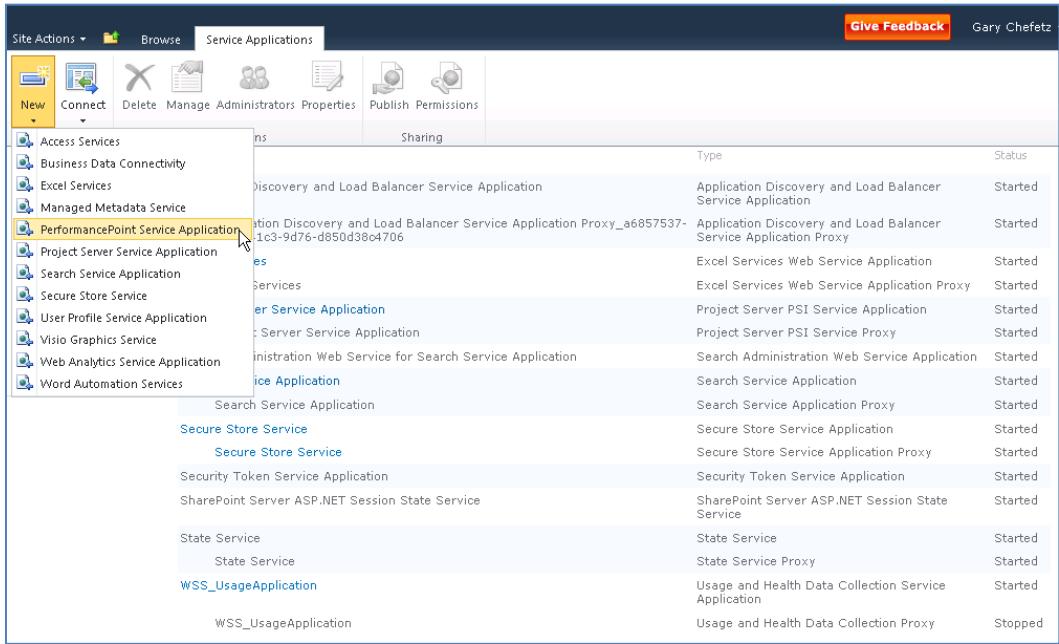
From the SharePoint *Central Administration* home page, click the *Manage service applications* link in the *Application Management* section. The system displays the *Manage Service Applications* page shown in Figure 5 - 1.

	Name	Type	Status
Application Management	Application Discovery and Load Balancer Service Application	Application Discovery and Load Balancer Service Application	Started
System Settings	Application Discovery and Load Balancer Service Application Proxy_a6857537-6058-41c3-9d76-d850d38e4706	Application Discovery and Load Balancer Service Application Proxy	Started
Monitoring			
Backup and Restore			
Security			
Upgrade and Migration			
General Application Settings			
Configuration Wizards			
Central Administration			
Excel Services	Excel Services	Excel Services Web Service Application	Started
	Excel Services	Excel Services Web Service Application Proxy	Started
Project Server Service Application	Project Server Service Application	Project Server PSI Service Application	Started
	Project Server Service Application	Project Server PSI Service Proxy	Started
Search Service Application	Search Administration Web Service for Search Service Application	Search Administration Web Service Application	Started
	Search Service Application	Search Service Application	Started
	Search Service Application	Search Service Application Proxy	Started
Secure Store Service	Secure Store Service	Secure Store Service Application	Started
	Secure Store Service	Secure Store Service Application Proxy	Started
Security Token Service Application	Security Token Service Application	Security Token Service Application	Started
	SharePoint Server ASP.NET Session State Service	SharePoint Server ASP.NET Session State Service	Started
State Service	State Service	State Service	Started
	State Service	State Service Proxy	Started
WSS_UsageApplication	WSS_UsageApplication	Usage and Health Data Collection Service Application	Started
	WSS_UsageApplication	Usage and Health Data Collection Proxy	Stopped

Figure 5 - 1: Manage Service Applications Page

On the *Manage Service Applications* page, click the *New* button in the *Create* section of the ribbon menu and select *PerformancePoint Service Application* from the drop-down menu as shown in Figure 5 - 2.

 If you enabled the PeformancePoint services while running the *SharePoint Farm Configuration wizard*, the system creates the service application for you. If you already have a PeformancePoint service application running, you can skip this section.



**Figure 5 - 2: Select to Create New PerformancePoint Application**

The system displays the *New PerformancePoint Service Application* page shown in Figure 5 - 3.

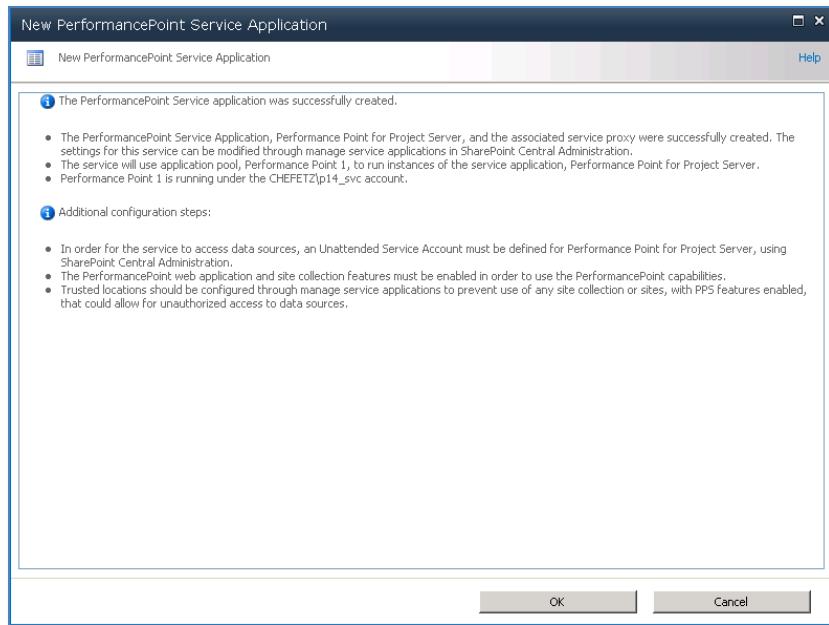
The dialog box is titled 'New PerformancePoint Service Application'. It contains the following fields and settings:

- Name:** The field is populated with 'Performance Point for Project Server'.
- Secure Store and Unattended Service Account:** A note states that the Secure Store Service is used to store the Unattended Service Account. A warning message indicates that the Unattended Service Account must be set for PerformancePoint Services to connect to data sources except as the currently authenticated user.
- Application Pool:** The 'Create new application pool' option is selected, and the name 'Performance Point 1' is entered.
- Security Account:** The 'Configurable' option is selected under 'Select a security account for this application pool'.
- Buttons:** The 'Create' and 'Cancel' buttons are at the bottom of the dialog.

**Figure 5 - 3: New PerformancePoint Service Application Page**

Type a name for your new PerformancePoint application, select an application pool or create a new application pool for your new PerformancePoint application (Recommended) by selecting the *Create new application pool* option and entering a name for the new application pool in the *Application pool name* field. Scroll down the page and select the *Configurable* option in the *Select a security account for this application pool* section and select a registered account to run the application pool. Click the *Create* button to create your new PerformancePoint application. The system may take a

couple minutes to create the application. When complete, the system displays the *New PerformancePoint Service Application* page with a confirmation as shown in Figure 5 - 4.



**Figure 5 - 4: PerformancePoint application successfully created**

Click the **OK** button to close the confirmation page. The system refreshes the SharePoint *Manage Service Applications* page with your new PerformancePoint application displayed and started.

## Configure Excel Services for Your Project Server Site

You now have a provisioned, but not completely configured, Project Server application and site. You can click the link on the *Manage Project Web Access Sites* page and your new PWA site will launch. After you verify that your site exists, the next step is to configure your system for reporting. Project Server 2010 uses the *SharePoint Server 2010 Report Center Web application* to provide a central point for hosting reports, dashboards, and report connections. You can create a variety of reports automatically or manually author additional reports as your users require them. The Report Center is driven by Excel Services in SharePoint Server 2010.

### Prepare to Configure Excel Services

For report authors to access the Project Server 2010 Reporting database from Excel 2010, they must be a member of the domain global group you created for Report Authors at the beginning of Module 4, and the global group must have db\_datareader rights on the reporting database. The login must allow explicit access to the Project Server 2010 Reporting database to get schema information and data. Follow these steps to create the login:

1. On the computer running SQL Server Analysis Services, launch Microsoft SQL Server 2008 SQL Server Management Studio and select the instance of SQL Server containing your Project Server 2010 reporting database and click the *Connect* button. Expand the *Security* folder and right-click *Logins*, and then select *New Login* from the popup menu as shown in Figure 5 - 5.

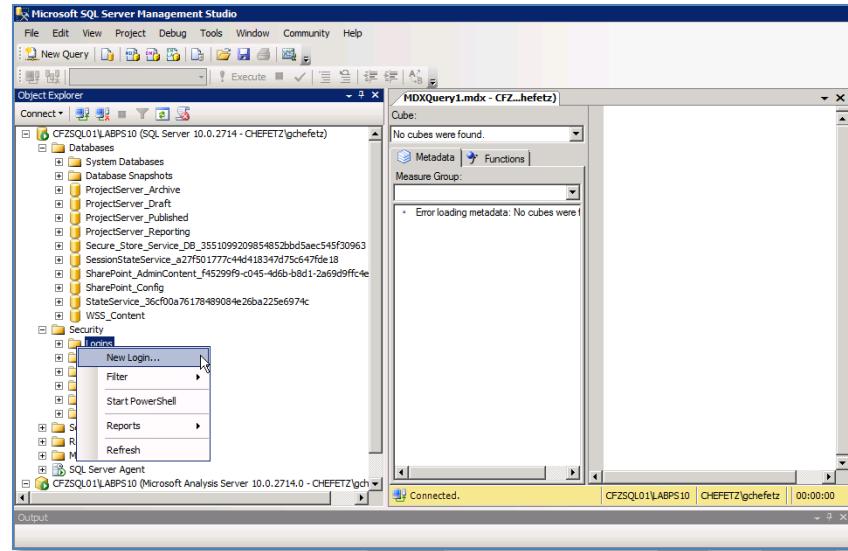


Figure 5 - 5: SQL Server Management Studio

2. The system displays the *Login-New* page shown in Figure 5 - 6. Enter the name of the global group as `domainname\groupname` in the *Login Name* field and click the *OK* button. If you do not remember the name, you can search for it using by pressing the *Search* button. In the search window, click on the *Object Types* button and select groups in the resulting window. Type the name of the group in the *Enter the object name to select* field and click the *Check Names* button to search. Click the *OK* button to select the located group.

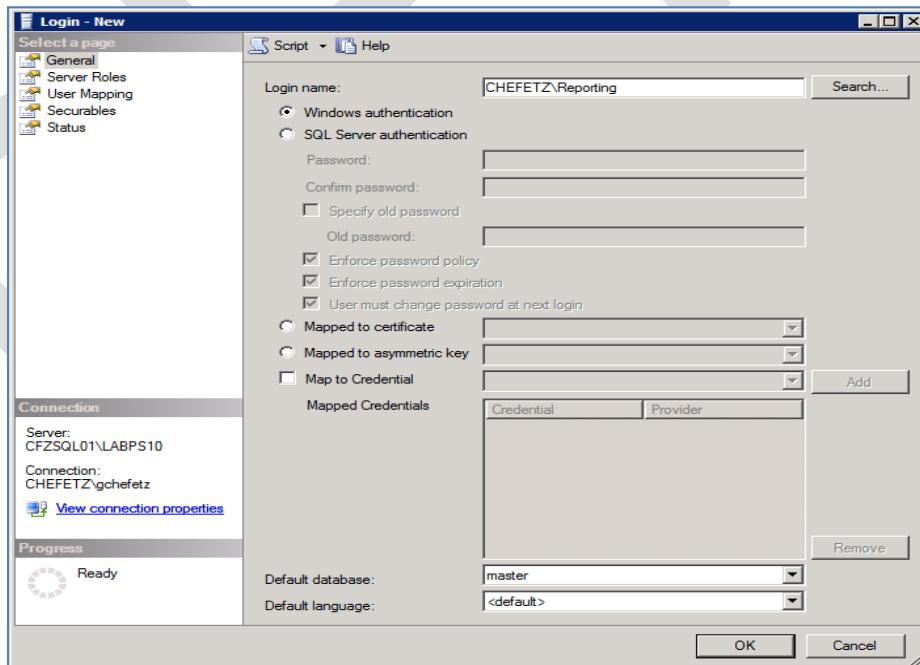


Figure 5 - 6: SQL Management Studio Login – New Window

3. Select the *User Mapping* page. In the *Users mapped to this login* section, select the checkbox to map your Project Server Reporting database, and in the *Database role membership for:* section select the checkbox for db\_datareader and leave the db\_public role selected as shown in Figure 5 - 7.

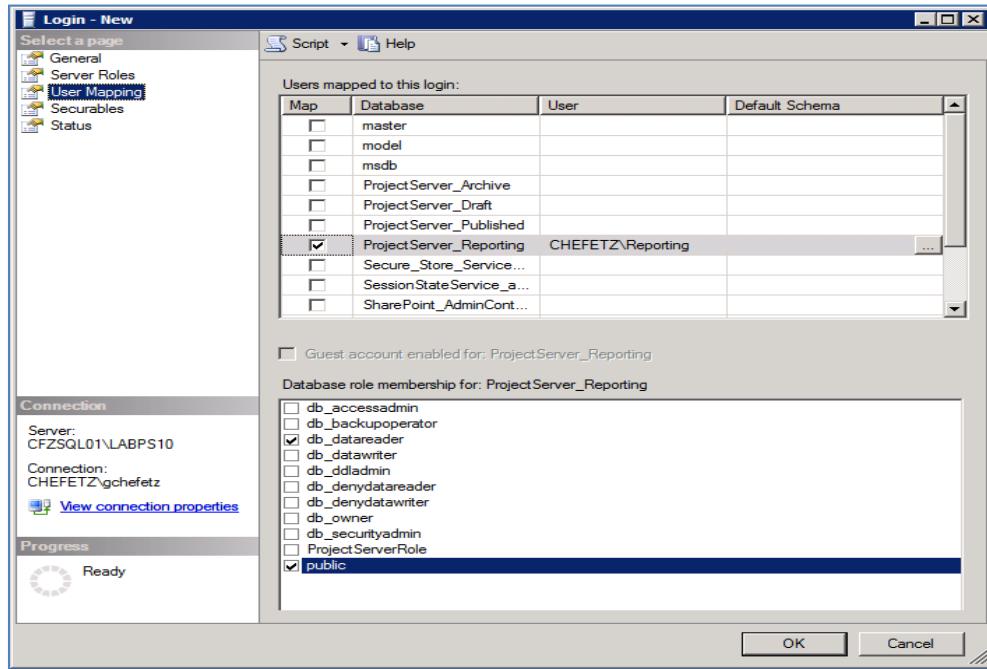


Figure 5 - 7: User Mapping page for SQL Server login

4. Click the OK button to complete the new login, and exit from SQL Management Studio if you like.

### Configure Excel Services

Excel Services for SharePoint Server 2010 provides the reporting foundation for Project Server. In a simple sense, Excel Services provides a platform for sharing spreadsheets on the web. Excel Services not only provides a fully interactive presentation layer for Excel Spreadsheets on the web with a similar experience to the Excel client, it also provides a rich security framework within which report authors and administrators can control user access. This functionality includes the ability to secure spreadsheet elements at a granular level; you can secure parts of a spreadsheet while exposing others. For instance, you can show certain users only Summary task information displayed on one sheet in the workbook while preventing them from seeing the detailed task information driving the summary tasks and contained in a different sheet in the workbook.

Microsoft Excel 2010 provides lush new data visualization features and conditional formatting capabilities that allow you to create visually stunning reports. You can then drop these into SharePoint web pages as web parts to create executive and team dashboards to drive decision making and collaboration. Users can interact with spreadsheets on the web using a familiar interface presented through the web using the new Microsoft Office Web Applications. By integrating Project Server with Excel Services, Microsoft has taken the Project Web Access interface from offering a paucity of reporting capacity to now providing a limitless data mining experience.



Project Server 2010 is also compatible with Excel 2007.



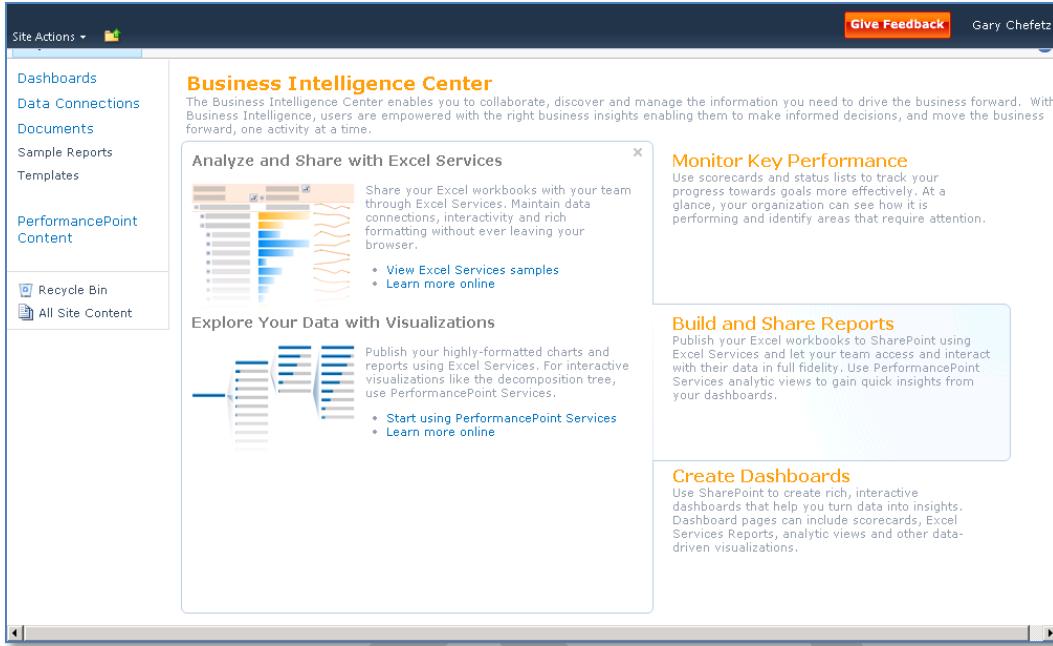
Discussing Excel Services and focusing only on the way Project Server leverages Excel Services by default is barely scratching the surface of its capabilities within and way beyond your EPM implementation. To be effective as a Project Server administrator, you should learn as much as possible about Excel Services and the business intelligence capabilities that ship with Microsoft SharePoint Server Enterprise Edition.

You build Project Server reports by using Excel Spreadsheets connected to data sources such as the Project Server Reporting database and the Project Server OLAP cubes. Excel connects to data sources by using trusted connections that are defined and stored in a SharePoint document library. To determine the URL for your *connection library* launch your new Project Web Access site and select *Business Intelligence* from the *My Work* section of the *Quick Launch menu* as shown in Figure 5 - 8.

The screenshot shows the Project Web Access homepage. The left sidebar features a 'Quick Launch' menu with several categories: Projects, Approval Center, Workflow Approvals, My Work (Tasks, Timesheet, Issues and Risks), Business Intelligence (selected), Resources (Resource Center, Status Reports), and Strategy (Driver Library, Driver Prioritization, Portfolio Analyses). The main content area displays 'Reminders' for Tasks, Timesheets, Approvals, Status Reports, and Issues and Risks. A copyright notice at the bottom states '© 2009 Microsoft Corporation. All rights reserved.'

Figure 5 - 8: Select Business Intelligence from the Quick Launch menu

The system displays the *Business Intelligence Center* home page as shown in Figure 5 - 9.



**Figure 5 - 9: Business Intelligence Center Home Page**

Welcome to your new Business Intelligence Center: you have arrived. By this I mean that the Business Intelligence Center is the most important value center Project Server 2010 inherits from the SharePoint Server Enterprise platform. It may take you a while to comprehend the enormity of the opportunity this provides for you to mine and analyze your Project Server data and allows you to mash-up your project and portfolio data with line of business systems and a vast array of disparate data sources, especially if you select to deploy the *Business Data Connectivity service*, also included with SharePoint Enterprise. The tool capabilities presented through combining Excel Services 2010 and PerformancePoint Services 2010, along with all of other conveniences of the SharePoint environment, make business intelligence more accessible to the average business user than ever before.

This becomes the single source of all serious reporting information for your Project Server 2010 environment. The only business analysis that has its own special home resides within the Portfolio Analysis area that supports project portfolio decision making. This specialized feature, previously provided by Microsoft Portfolio Server 2007, is generally not for the average business user. Project Server ships with sample reports and dashboards to form a basic reporting framework upon which you can build your own organization-specific content. You learn more about building Reports and Dashboards in Module 10.

To proceed with your implementation, select the *Data Connections* link from the Quick Launch menu. On the *Data Connections* page, select the *English (United States) Project Server Data Connections* check box. The system displays the *Data Connections* page as shown in Figure 5 - 10 with the ribbon menu displayed.

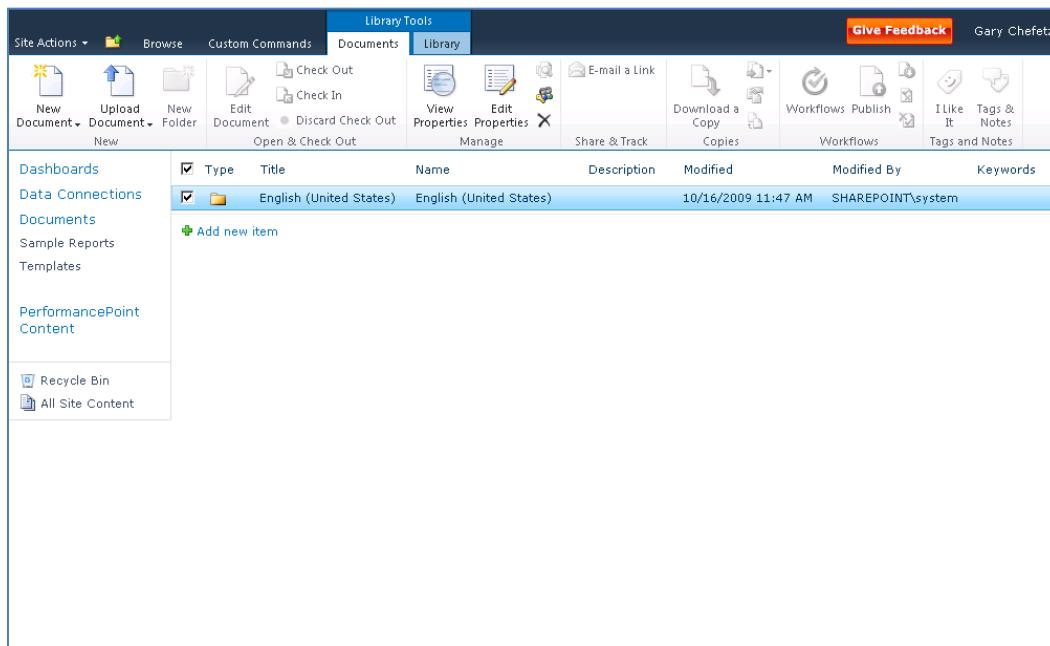


Figure 5 - 10: Data Connections Page

On the Menu, click the *View Properties* button. The system displays the *Data Connections Properties* dialog shown in Figure 5 - 11.



Figure 5 - 11: Data Connections Properties dialog

On the *Data Connections Properties* page, right-click the *English (United States)* Project Server Data Connections link, and then select *Properties*. The system displays the *Properties* dialog shown in Figure 5 - 12.

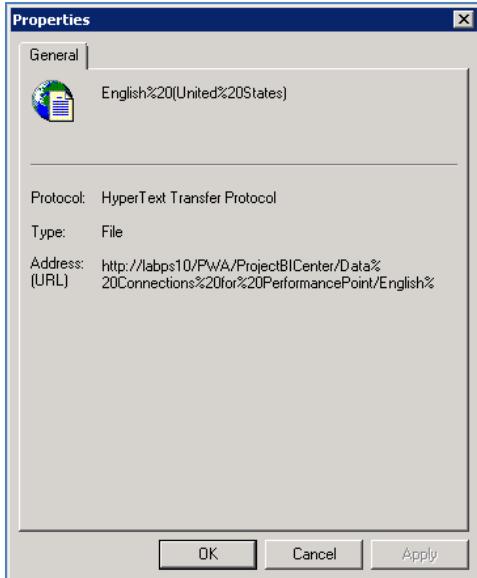


Figure 5 - 12: Properties dialog

Notice that the system displays the URL for your Data Connections library, which you need to set up a trusted data connection for the library in the steps that follow. On the *Properties* dialog box, select the Address (URL) value and press *Ctrl + C*, or right-click the selected text, and then click *Copy* to harvest the URL. Click the *Cancel* button after you copy the URL to your clipboard. Save the URL to a handy place, such as a new Notepad document, for later use. Then click the *Close* button on the *Data Connections Properties* dialog.

With the correct URL of the Data Connections library saved in a handy place, navigate to your SharePoint *Central Administration* site to set up the trusted connection for Excel Services. From the *Central Administration* home page, select the *Manage service applications* link from the *Application Management* section. The system displays the *Service Applications* page shown in Figure 5 - 13.

The screenshot shows the SharePoint Central Administration interface under the 'Service Applications' section. The left navigation menu is visible, showing options like Application Management, System Settings, Monitoring, Backup and Restore, Security, Upgrade and Migration, General Application Settings, and Configuration Wizards. The main content area displays a table of service applications. The 'Excel Services' row is highlighted, indicating it is selected. The columns in the table are Name, Type, and Status. The 'Excel Services' row contains two entries: 'Excel Services' and 'Excel Services Web Service Application'. Both entries have 'Started' status.

Name	Type	Status
Application Discovery and Load Balancer Service Application	Application Discovery and Load Balancer Service Application	Started
Application Discovery and Load Balancer Service Application Proxy_a6857537-6058-41c3-9d76-d850d38c4706	Application Discovery and Load Balancer Service Application Proxy	Started
<b>Excel Services</b>	Excel Services Web Service Application	Started
Excel Services	Excel Services Web Service Application Proxy	Started
<b>Project Server Service Application</b>	Project Server PSI Service Application	Started
Project Server Service Application	Project Server PSI Service Proxy	Started
<b>Secure Store Service</b>	Secure Store Service Application	Started
Secure Store Service	Secure Store Service Application Proxy	Started
Security Token Service Application	Security Token Service Application	Started
SharePoint Server ASP.NET Session State Service	SharePoint Server ASP.NET Session State Service	Started
<b>State Service</b>	State Service	Started
State Service	State Service Proxy	Started

Figure 5 - 13: Service Applications Page

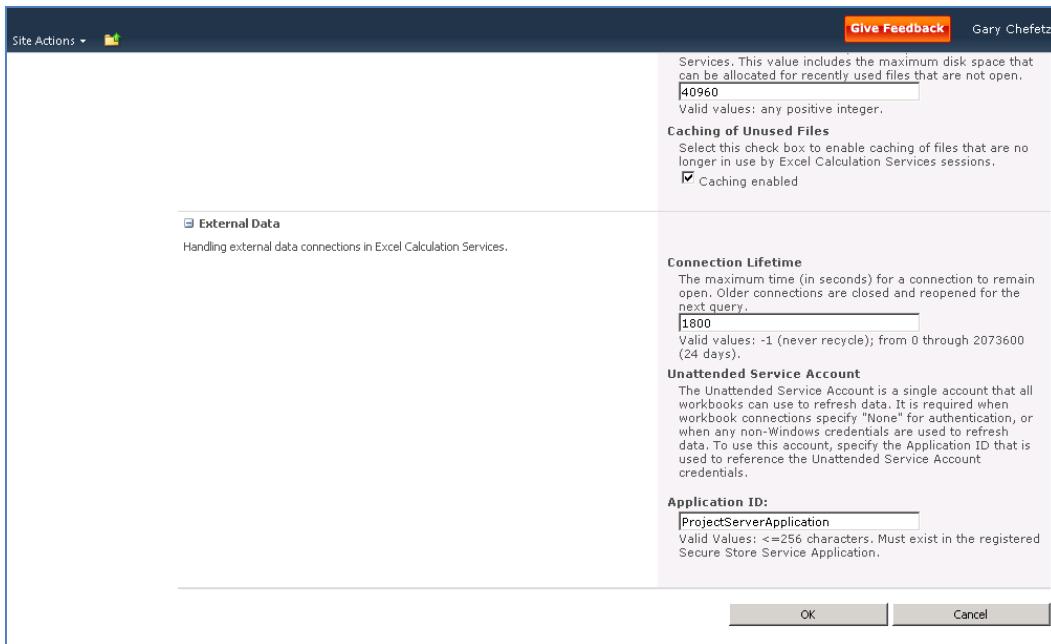
Select the *Excel Services* row by clicking on the non-hyperlink portion of the row. (Note that clicking on the *Excel Services* hyperlink navigates you off the current page.) With the row selected, click the *Manage* button on the menu or click the *Excel Services* link. The system displays the *Manage Excel Services* page shown in Figure 5 - 14.

The screenshot shows the 'Central Administration > Manage Excel Services' page. The left navigation menu is identical to Figure 5 - 13. The main content area contains several sections with descriptive text and links:

- Global Settings**: Define load balancing, memory, and throttling thresholds. Set the unattended service account and data connection timeouts.
- Trusted File Locations**: Define places where spreadsheets can be loaded from.
- Trusted Data Providers**: Add or remove data providers that can be used when refreshing data connections.
- Trusted Data Connection Libraries**: Define a SharePoint Document Library where data connections can be loaded from.
- User Defined Function Assemblies**: Register managed code assemblies that can be used by spreadsheets.

Figure 5 - 14: Manage Excel Services Page

On the *Manage Excel Services* page, click the *Global Settings* link. Scroll to the bottom of the page, and in the *External Data* section enter ProjectServerApplication in the *Application ID* text box as shown in Figure 5 - 15.



**Figure 5 - 15: Enter Application ID**

After completing your entry, click the *OK* button to save your data and return to the *Manage Excel Services* page shown previously in Figure 5 - 14. On the *Manage Excel Services* page, click the *Trusted File Locations* link. The system displays the *Excel Services Trusted File Locations* page shown in Figure 5 - 16.

Trusted File Locations																										
This is a list of Excel workbook file locations that you consider trustworthy. Excel Services denies requests to open files that are not stored in one of the trusted locations.																										
Central Administration Application Management System Settings Monitoring Backup and Restore Security Upgrade and Migration General Application Settings Configuration Wizards	<a href="#">Add Trusted File Location</a> <table border="1"> <thead> <tr> <th>Address</th> <th>Description</th> <th>Location Type</th> <th>Trust Children</th> <th>Workbook Calculation Mode</th> <th>Allow External Data</th> <th>Warn on Refresh</th> <th>Display Granular External Data Errors</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>http://</td> <td>Microsoft SharePoint Foundation</td> <td>File</td> <td>Yes</td> <td>File</td> <td>Yes</td> <td>Yes</td> <td>Yes</td> <td>Normal</td> </tr> </tbody> </table>								Address	Description	Location Type	Trust Children	Workbook Calculation Mode	Allow External Data	Warn on Refresh	Display Granular External Data Errors	Status	http://	Microsoft SharePoint Foundation	File	Yes	File	Yes	Yes	Yes	Normal
Address	Description	Location Type	Trust Children	Workbook Calculation Mode	Allow External Data	Warn on Refresh	Display Granular External Data Errors	Status																		
http://	Microsoft SharePoint Foundation	File	Yes	File	Yes	Yes	Yes	Normal																		

**Figure 5 - 16: Excel Services Trusted File Locations Page**

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Click the *Add Trusted File Location* link. The system displays the *Excel Services Add Trusted File Location* page shown in Figure 5 - 17. Note that the figure below continues across two pages.

The screenshot shows the 'Edit Trusted File Location' dialog box within the SharePoint Central Administration interface. The left sidebar lists various administration categories. The main form contains several sections:

- Location:** A Microsoft SharePoint Foundation location, network file share, or Web folder from which a server running Excel Services is permitted to access workbooks.
- Address:** The full Microsoft SharePoint Foundation location, network file share or Web folder address of this trusted location. (e.g., <http://labps10/pwa/ProjectReportCenter>)
- Location Type:** Storage type of this trusted location:
  - Microsoft SharePoint Foundation
  - UNC
  - HTTP
- Trust Children:** Trust child libraries or directories.
  - Children trusted
- Description:** The optional description of the purpose of this trusted location.
- Session Management:** Behavior of Excel Calculation Services sessions using workbooks from this location.
- Session Timeout:** The maximum time (in seconds) that an Excel Calculation Services session can remain open and inactive before it is shut down, as measured from the end of each request.  
[300]  
Valid values: from -1 (no timeout) through 2073600 (24 days). 0 means that the session expires at the end of a single request.
- Short Session Timeout:** The maximum time (in seconds) that an Excel Web Access session can remain open and inactive, prior to any user interaction, before it is shutdown. Short Session Timeout duration is measured from the end of the initial Open request.  
[75]  
Valid values: from -1 (short session timeout is disabled) through 2073600 (24 days). 0 means that the session expires at the end of a single request.
- New Workbook Session Timeout:** The maximum time (in seconds) that an Excel Calculation Services session for a new workbook can remain open and inactive before it is shut down, as measured from the end of each request.  
[1800]  
Valid values: from -1 (no timeout) through 2073600 (24 days). 0 means that the session expires at the end of a single request.
- Maximum Request Duration:** The maximum duration (in seconds) of a single request in a session.  
[300]  
Valid values: -1 (no limit); from 1 through 2073600 (24 days).
- Maximum Chart Render Duration:** The maximum time (in seconds) spent rendering any single chart.  
[3]  
Valid values: -1 (no limit); from 1 through 2073600 (24 days).
- Maximum Workbook Size:** The maximum size (in MB) of a workbook that can be opened by Excel Calculation Services.  
[10]  
Valid values: from 1 through 2000.
- Maximum Chart or Image Size:** The maximum size (in MB) of a chart or image that can be opened by Excel Calculation Services.  
[1]  
Valid values: any positive integer.

Figure 5 - 17: Excel Services Add Trusted File Location details page

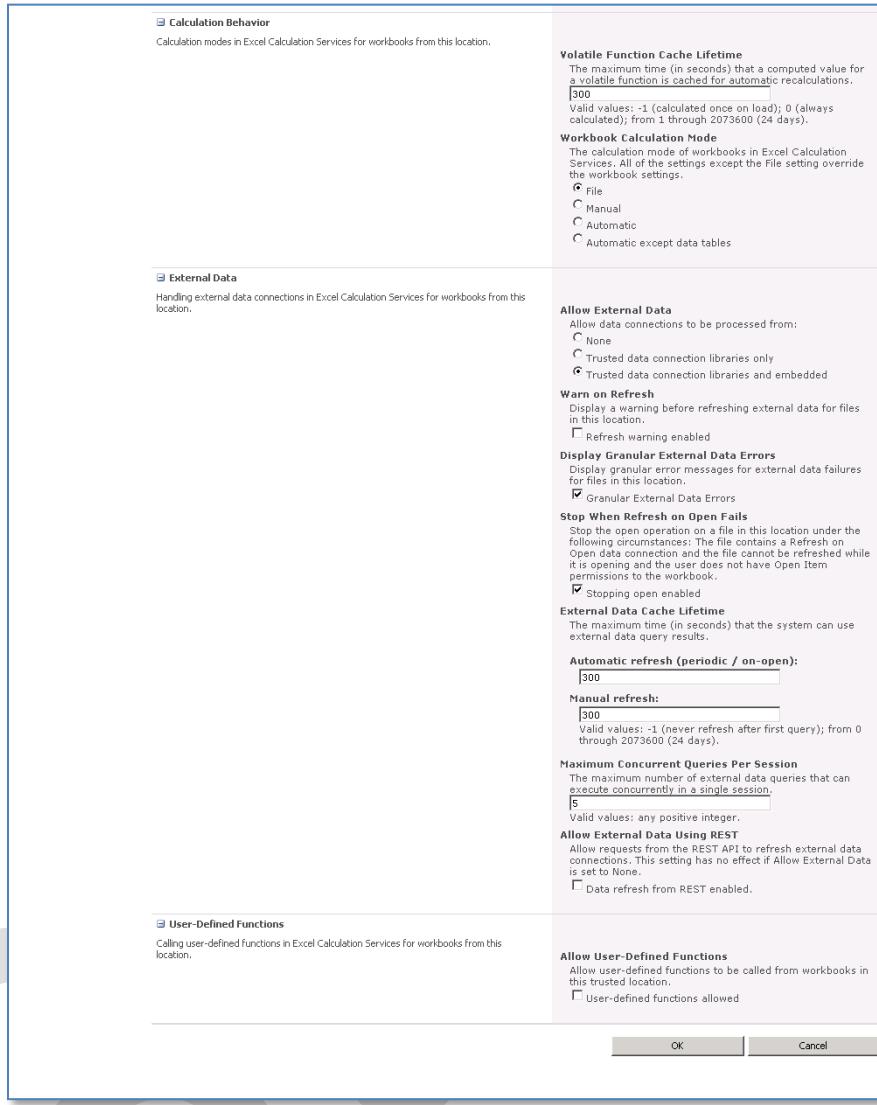


Figure 5 - 17: Continued

In the *Address* field at the top of the page, enter the URL that you copied for your Business Intelligence Center

```
http://<servername>/<projectsitename>/ProjectBICenter/Data%20Connections%20for%20PerformancePoint/English%20(United%20States)
```

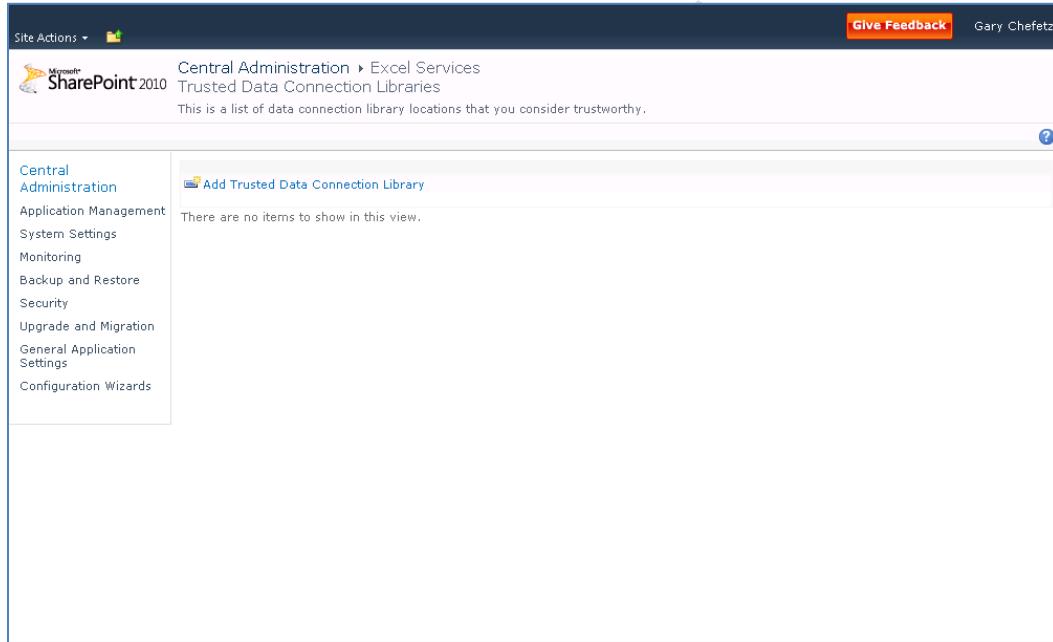
substituting your server name for <servername> and your Project Web Access site name for <projectsitename>.

- In the *Trust Children* section, select the *Children trusted* check box.
- In the *Allow External Data* section underneath *External Data*, select the *Trusted data connection libraries and embedded* option.
- In the *Warn on Refresh* section, clear the *Refresh warning enabled* check box.

## Module 05

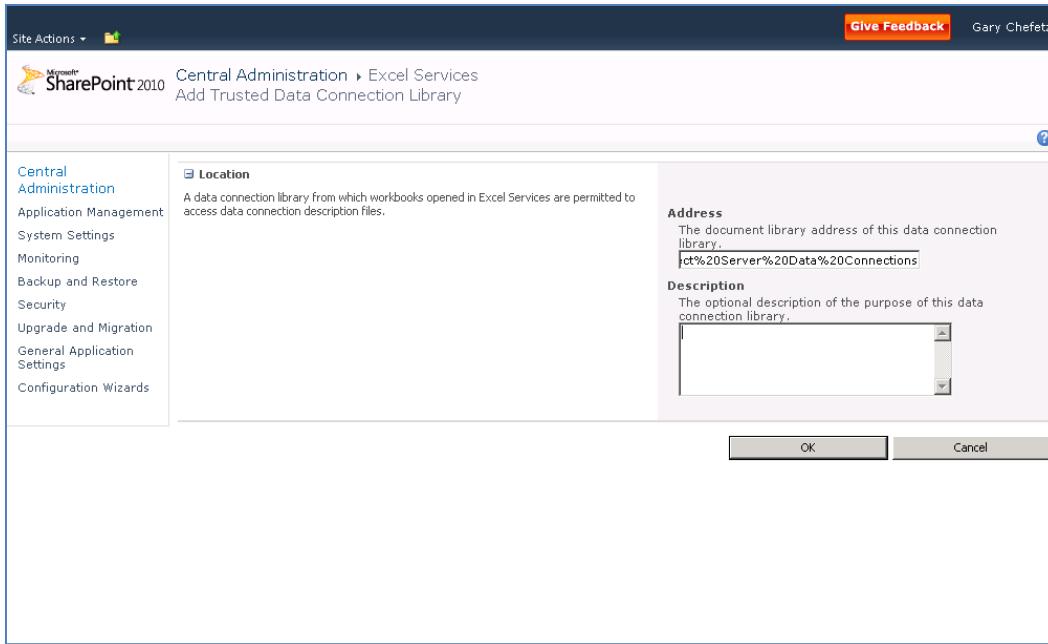
Click the *OK* button to save your entries. The system redisplays the *Excel Services Trusted File Locations* page, with your new trusted location, shown previously in Figure 5 - 16. Click the *Central Administration* link at the top of the Quick Launch menu to return to the SharePoint *Central Administration* home page.

From the SharePoint *Central Administration* home page, click on the *Manage Service Applications* link. The system displays the *Manage service applications* page shown previously in Figure 5 - 13. As you did previously, select the *Excel Services* row without clicking on a link portion of the row, and then click the *Manage* button on the menu. The system displays the *Manage Excel Services* page shown previously in Figure 5 - 14. Click the *Trusted Data Connection Libraries* link. The system displays the *Excel Services Trusted Data Connection Libraries* page shown in Figure 5 - 18.



**Figure 5 - 18: Excel Services Trusted Data Connection Libraries Page**

Click the *Add Trusted Data Connection Library* link. The system displays the *Excel Services Add Trusted Data Connections Library* page shown in Figure 5 - 19.



**Figure 5 - 19: Excel Services Add Trusted Data Connection Library Page**

In the *Address* field, type the URL for the data connection library that you harvested previously. It should be in the following format:

```
http://<ServerName>/<ProjectSiteName>/ProjectBICenter/Data%20Connections%20for%20PerformancePoint/English%20(United%20States)
```

Click the OK button to save your new trusted connection.

## Configure the Secure Store Service Application

The *Secure Store Service*, formerly known by its code name “*Geneva*,” provides claims-based authentication to the SharePoint environment. The *Secure Store Service* is the marriage of three Microsoft technologies: 1) *Active Directory Federation Services*, 2) *Windows CardSpace*, and 3) *Windows Identity Foundation* working together to provide a flexible standards-based authentication service that can interact with any business identity system including Active Directory, LDAP-based directories, application-specific identity systems as well as user-centric systems like Microsoft’s *LiveID*.

The *Secure Store Service* stores information about users connecting from various systems in its own metadata store. The system accepts and issues security tokens, more commonly referred to simply as “*tokens*,” that contain information about the rights of, or “*assertions*” about, various users to access system objects and data. These “*assertions*” are collectively referred to as “*claims*.” The *Secure Store Service* acts as a common security broker that provides a bridge between identity systems, external data stores and service applications running within the SharePoint envelope.



Microsoft's best-practice recommendation is to isolate your *Secure Store Service* deployment as much as possible. If you are deploying within a larger SharePoint farm, you probably planned your architecture by following Microsoft's best practices for deploying SharePoint Server farms. If you haven't already read this guidance, you should review the available SharePoint Server 2010 deployment documentation on TechNet. Microsoft's best-practice recommendations are as follows:

- Run the secure store service in its own isolated application pool.
- Run the secure store service on its own application server.
- Create the secure store database on a different SQL Server than the one hosting your SharePoint Server 2010 databases.

If you are building a small farm to house your Project Server environment on its own server island, then you may not be able to follow these best-practice guidelines, and you may not have the luxury of using multiple SQL Server boxes, but you can isolate these using SQL Server instances. Of course there are licensing impacts to extending your SharePoint Server farm and SQL Server deployments onto additional processors.

### **Create a Secure Store Service Application**

If you did not select to enable the Secure Store Service when you ran the Farm Configuration wizard, you must start the service and create a new Service Application. If you configured this using the wizard, you can skip this section and go directly to the *Generate a New Encryption Key* topic that follows. Otherwise, start the service from the *Manage services on server* link in the *System Settings* section of the *SharePoint Central Administration* page. Then, from the *SharePoint Central Administration* home page, click the *Manage service applications* link in the *Application Management* section. The system displays the *Manage Service Applications* page shown in Figure 5 - 20.

Service Application Type	Name	Description	Type	Status
Application Discovery and Load Balancer Service Application	Application Discovery and Load Balancer Service Application Proxy_a6857537-6058-41c3-9d76-d850d38c4706	Application Discovery and Load Balancer Service Application Proxy	Started	
Excel Services	Excel Services	Excel Services Web Service Application	Started	
Performance Point for Project Server	Performance Point for Project Server	PerformancePoint Service Application	Started	
Project Server Service Application	Project Server Service Application	Project Server PSI Service Application	Started	
Search Service Application	Search Service Application	Search Administration Web Service for Search Service Application	Started	
Secure Store Service	Secure Store Service	Secure Store Service Application	Started	
Security Token Service Application	Security Token Service Application	Security Token Service Application	Started	
SharePoint Server ASP.NET Session State Service	SharePoint Server ASP.NET Session State Service	SharePoint Server ASP.NET Session State Service	Started	
State Service	State Service	State Service	Started	
WSS_UsageApplication	WSS_UsageApplication	Usage and Health Data Collection Service Application	Started	
		Usage and Health Data Collection Proxy	Stopped	

**Figure 5 - 20: Manage Service Applications Page**

On the *Manage Service Applications* page, click the *New* button in the *Create* section of the ribbon menu and select the *Secure Store Service* selection as shown in Figure 5 - 21.

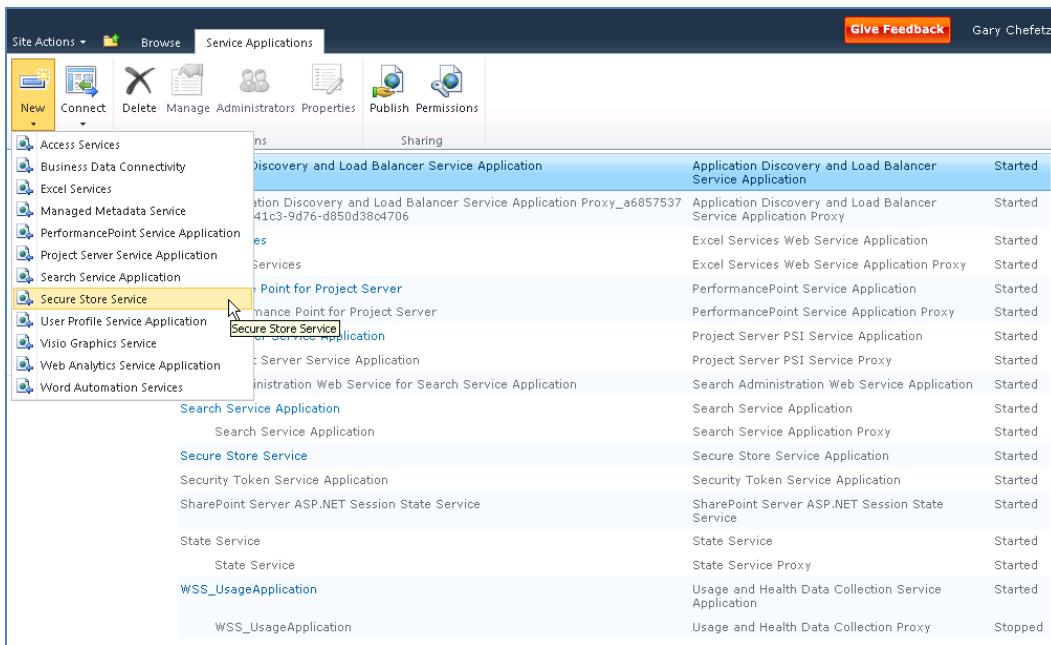


Figure 5 - 21: Select to Create New SecureStore Application

The system displays the *Create New Secure Store Service Application* page shown in Figure 5 - 22.

The dialog box is titled 'Create New Secure Store Service Application'. It contains fields for 'Service Application Name' (SecureStoreService), 'Database Server' (dfsql01\labps10), 'Database Name' (Secure\_Store\_Service\_DB\_ddb63f93-5), and 'Database authentication' (Windows authentication (recommended)). The 'Failover Server' section is also visible.

Figure 5 - 22: Create New Secure Store Service Application Page  
(Entire page not shown)

Type a name for your new Secure Store Service application, and then select an application pool or create a new application pool for your new *Secure Store Service* application (Recommended) by selecting the *Create new application pool* option and entering a name for the new application pool in the *Application pool name* field. Scroll down the page and select the *Configurable* option in the *Select a Security account for this application pool* section and select a registered account or register a new account to run the application pool. Click the *OK* button to create your new Secure Store Ser-

vice application. The system may take a couple minutes to create the application. When complete, the system displays the *Create New Secure Store Service Application* page with a confirmation as shown in Figure 5 - 23.

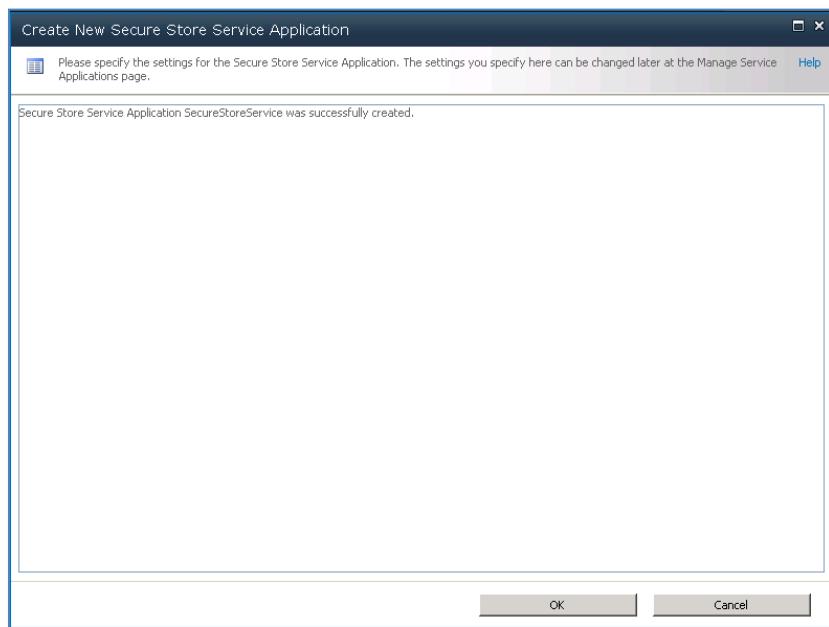


Figure 5 - 23: Secure Store Service Application successfully created

Click the *OK* button to close the confirmation page. The system refreshes the SharePoint *Manage Service Applications* page with your new *Secure Store Service Application* displayed and started.

### Generate a New Encryption Key

The next step is to generate an encryption key for the Secure Store. Because this is the key the system uses to encrypt and decrypt user credentials data housed in the secure store, it deserves careful handling. Be certain to read the following best-practice note before proceeding with this part of the configuration process.



Before generating a new encryption key, you should always back up the secure store database. In addition, you should back up the Secure Store database immediately after you create it in the previous steps. Now would be the time to do this.

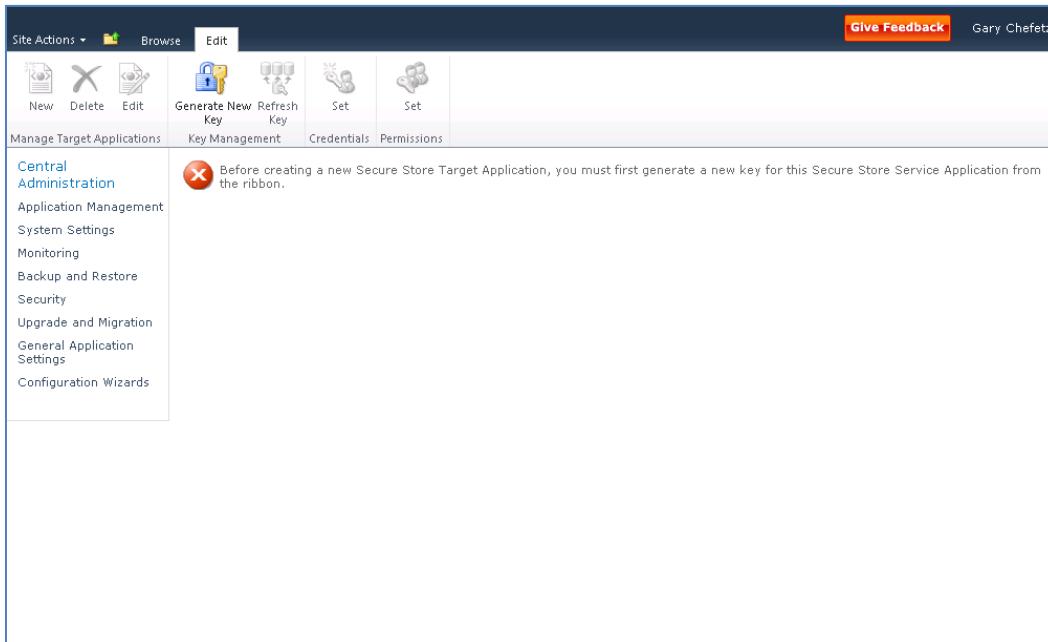
After completing the initial setup of the Secure Store Service, back up your encryption key, and back it up each time you regenerate it.

Store the database backup and Encryption Key backup on separate physical backup media. A malicious user must have access to both to compromise the data store.



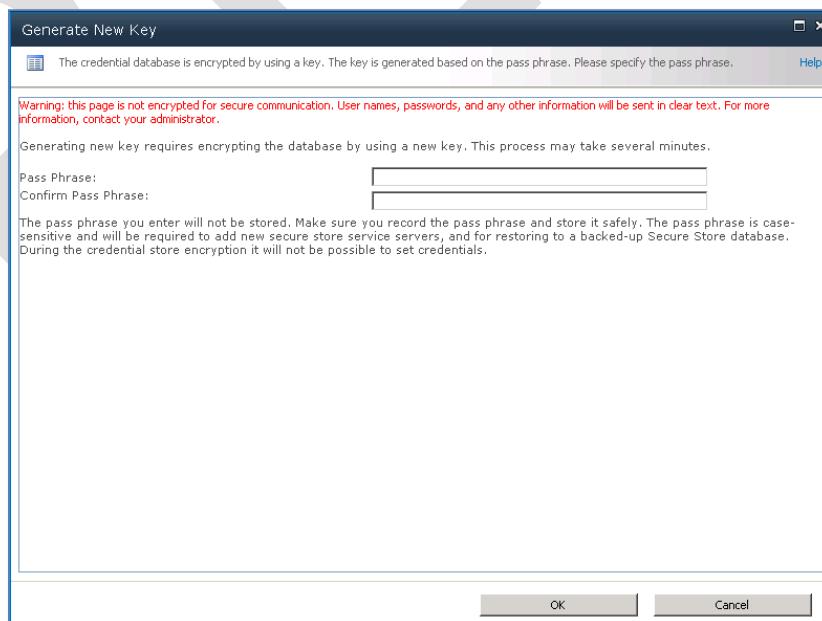
**Warning:** When you regenerate a key, the system re-encrypts the database with the new key. If the key refresh fails, you cannot return to the previous state without both a backup of both the Secure Store Service database and its corresponding key backup.

From the SharePoint *Central Administration* home page, select the *Manage service applications* link in the *Application Management* section. From the *Manage Service Applications* page, select either link for the *Secure Store Service* application. The system displays the *Secure Store Service Application: Secure Store Service* page shown in Figure 5 - 24.



**Figure 5 - 24: Secure Store Service Page**

Notice that the system alerts you that you must generate a key before you can create a new *Secure Store Target Application*. To generate a new key, click the *Generate New Key* button in the *Key Management* section of the menu. The system displays the *Generate New Key* page shown in Figure 5 - 25.



**Figure 5 - 25: Generate New Key Page**

Enter a pass phrase for the encryption key in the *Pass Phrase* field and confirm it in the *Confirm Pass Phrase* field. Your pass phrase should consist of upper case and lower case letters as well as one or more numbers and special characters. Click the *OK* button to submit your pass phrase. After processing momentarily, the system redisplays the *Secure Store Service Target Applications* page without the stop warning as shown in Figure 5 - 24. Remain on this page to complete the next procedure.

### Create a Secure Store Target Application

In this step, create the *Secure Store Target Application*. Click the *New* button in the *Manage Target Applications* section of the menu. The system displays the *Create New Secure Store Target Application* page shown in Figure 5 - 26.

The screenshot shows the 'Create New Secure Store Target Application' page in SharePoint Central Administration. The left navigation bar includes 'Central Administration', 'Application Management', 'System Settings', 'Monitoring', 'Backup and Restore', 'Security', 'Upgrade and Migration', 'General Application Settings', and 'Configuration Wizards'. The main content area has a title 'Target Application Settings' and a sub-instruction: 'Specify the settings for the new Secure Store Target Application. The settings that you specify here can be changed later at Secure Store Target Application page.' It contains fields for 'Target Application ID' (a required text input), 'Display Name' (a required text input), 'Contact E-mail' (a required text input), 'Target Application Type' (a dropdown menu set to 'Individual'), 'Target Application Page URL' (with radio buttons for 'Use default page' (selected) and 'Use custom page' (unchecked)), and 'None' (radio button for specifying credential fields). At the bottom are 'Next' and 'Cancel' buttons.

Figure 5 - 26: Create New Secure Store Target Application Page

When you create your New Secure Store Target Application, you must enter "ProjectServerApplication" without the quotes in the *Target Application ID* field including the Upper Case characters and spacing as shown. The built-in reports and data connections contain pointers to this specific Secure Store Target applicaiton. If you do not use this exact name, you must edit all of the connection strings for the built-in Trusted Data Connections and Sample Reports to point to your Secure Store Target Applicaiton ID.

In the *Target Application ID* box, type "ProjectServerApplication" and type a display name for your new *Target Application*. Enter a valid email address in the *Contact E-mail* field, and select *Group* from the *Target Application Type* pick list. The system automatically selects the *None* option in the *Target Application Page URL* section. Click the *Next* button to confirm your entries. The system displays the *Specify the credential fields for your Secure Store Target Application* page shown in Figure 5 - 27.

Central Administration > Create New Secure Store Target Application

Specify the credential fields for your Secure Store Target Application.

Add Field	Field Name	Field Type	Masked	Delete
	<input type="text" value="Windows User Name"/>	Windows User Name	<input type="checkbox"/>	X
	<input type="text" value="Windows Password"/>	Windows Password	<input checked="" type="checkbox"/>	X

Important: The field names and field types cannot be edited later.

Next Cancel

Figure 5 - 27: Specify Credentials... Page

The page defaults to the fields necessary to authenticate with Windows credentials, which include the *Windows User Name* and *Windows Password* fields. Notice that you can determine the display name for the fields that you can select from the *Field Type* pick lists and that you can select the *Masked* option or delete the default fields. You might use a different set of fields when creating a *Target Application* for a different application, but for the Project Server *Target Application*, you will use the defaults. Click the *Next* button to continue. The system displays the *Specify the membership settings* page shown in Figure 5 - 28.

Central Administration > Create New Secure Store Target Application

Specify the membership settings...

<b>Target Application Administrators</b>	The list of users who have access to manage the Target Application settings. The Farm administrator will have access by default.	<input type="text"/>
<b>Members</b>	The users and groups that are mapped to the credentials defined for this Target Application.	<input type="text"/>

Users who have Full Control or All Target Applications privileges can administer this Secure Store Target Application.

After creating the new application, you can add credential mappings by using the "Set Credentials" button for the selected application. You can edit the settings of this application later at the Manage Target Applications page.

OK Cancel

Figure 5 - 28: Specify the membership settings page

## Module 05

On the *Specify the membership settings* page, type the username for the Farm Administrator role in the *Target Application Administrators* field. In the *Members* field, enter the name of the domain group you created for report viewers. Verify that you entered the correct names by clicking the people icon with the check. Click the *OK* button to continue. The system proceeds to create the *Secure Store Target Application*. This may take several minutes. When the process completes, the system displays the *Target Application* page for the Secure Store Service shown in Figure 5 - 29.

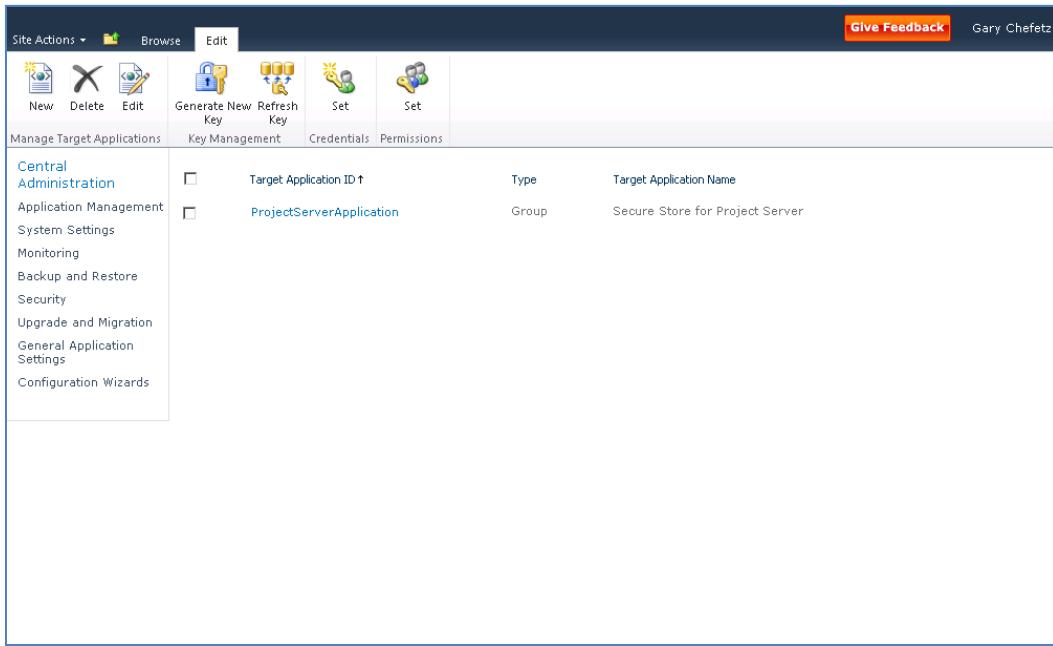


Figure 5 - 29: Target Application page for Secure Store Service

Select the Secure Store Target application that you just created and click the *Set: Credentials* button on the ribbon. The system displays the *Set Credentials for Secure Store Target Application (Group)* page shown in Figure 5 - 30.

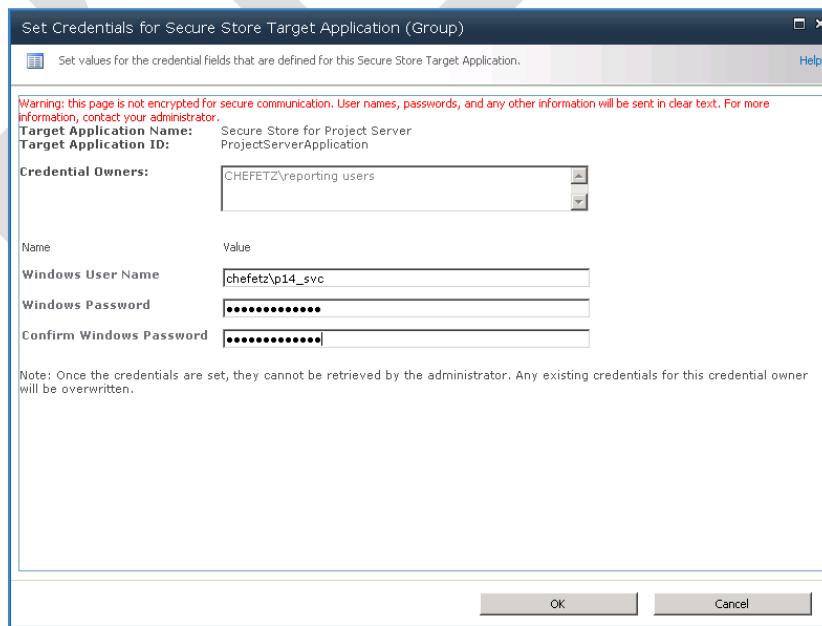


Figure 5 - 30: Set Credentials for Secure Store Target Application

Enter the service account identity you want to use for the Secure Store application as well as the password for the account in the appropriate entry fields. Click the *OK* button to set the credentials for your new target application.

## Configure the Cube Building Service

The first step in setting up Analysis services for Project Server is to verify that you have the necessary SQL components installed on each server in your configuration. If you installed to an environment with more than one server, you must install SQL client components on servers running the Project Server service application on your farm. If you installed to a single server, you may already have these components installed on your system. You must install the *SQL Server 2005 Native Client* and the *SQL Server 2005 Analysis Management Objects* (AMO) on the server running Project Server 2010, regardless of whether you are using SQL Server 2005 or SQL Server 2008. Project Server 2010 uses the *Analysis Management Objects*, a departure from the Project Server 2007 approach which used the *SQL Server Analysis Services Decision Support Objects* (DSO). You must also install the *SQL Server 2005 Native Client* on the computer running Analysis Services if this is located on a separate machine.

### ***Obtain the Necessary Software Files***

Your first objective is to obtain the necessary components for Microsoft downloads. Go to the primary download site at <http://www.microsoft.com/downloads> and search for “SQL Server feature pack.” As Microsoft download locations can change, it is always best to begin with a search, which also allows you to obtain the latest available version.

You can download the *SQL Server 2008 Native Client* here:

<http://go.microsoft.com/fwlink/?LinkId=123718&clcid=0x409>

You can download the *SQL Server 2008 Analysis Management Objects* (AMO) here:

<http://go.microsoft.com/fwlink/?LinkId=130655&clcid=0x409>



If the above links do not work, remember that the Feature Pack for SQL is available for both standard 32-bit (X86) systems and for 64-bit systems (X64). Select the appropriate X64 files for your server.

### ***Install the SQL Server Native Client***

You should not need to manually install the *SQL Server 2008 Native Client* unless you did not use the *SharePoint Technologies Preparation Tool*, or the installation failed for some reason. If you need to install the *SQL Server 2008 Native Client* components manually, follow the directions below:

1. Double-click the MSI Package that you downloaded for the Microsoft *SQL Server Native Client* (sqlnclix64.msi). The system displays the *SQL Server Native Client Setup* screen shown in Figure 5 - 31.

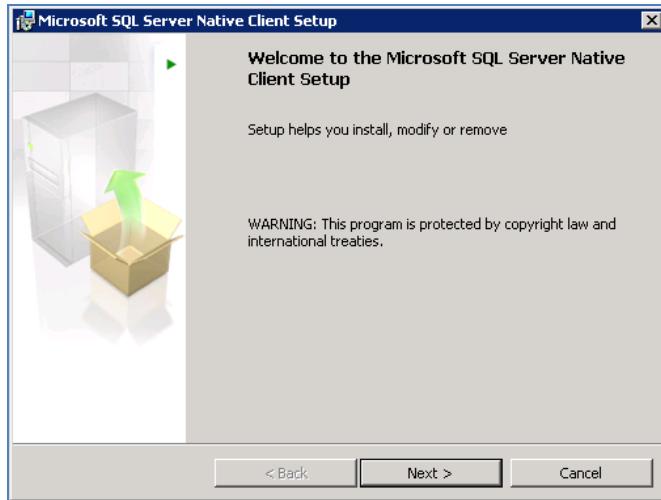


Figure 5 - 31: SQL Server Native Client

The system displays the *SQL Server Native Client End User License Agreement* shown in Figure 5 - 32.

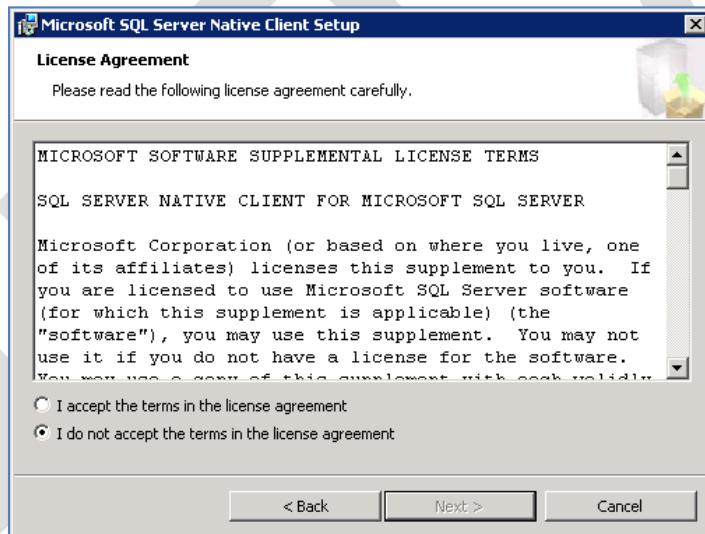
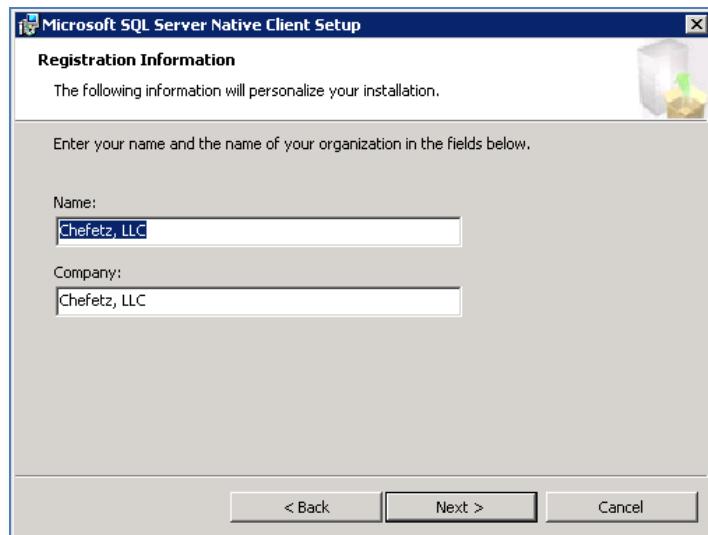


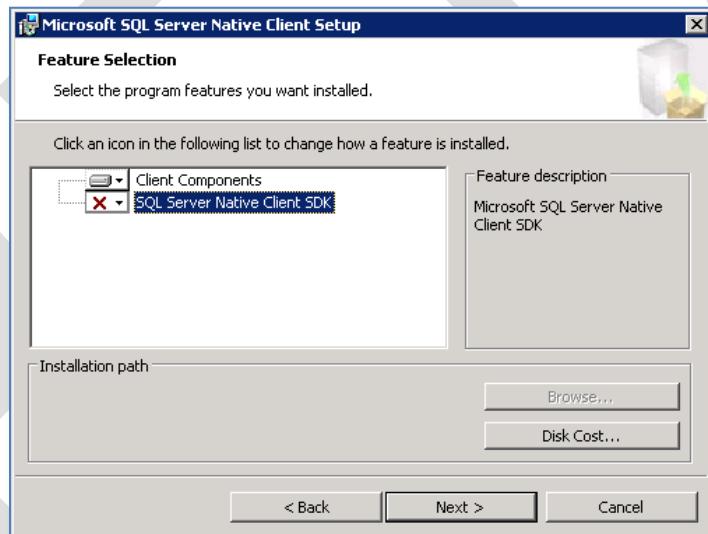
Figure 5 - 32: SQL Server Native Client  
EULA page

2. Read the license agreement. In order to continue you must accept the terms; to accept select the *I accept the terms in the license agreement* radio button and click the *Next* button to continue the installation. The system displays the *Registration Information* page shown in Figure 5 - 33.



**Figure 5 - 33: SQL Server Native Client Registration Information**

3. Complete the information on the *Registration Information* page and click the *Next* button to continue. The system displays the *Feature Selection* page shown in Figure 5 - 34.



**Figure 5 - 34: Feature Selection Page**

4. Select the *Client Components* and, optionally, the *Software Developers Kit* (SDK) as well. Note that you can view the Disk space requirements for the selected components by clicking on the *Disk Cost* button. Click the *Next* button to continue and the system displays the *Ready to Install the Program* page shown in Figure 5 - 35.

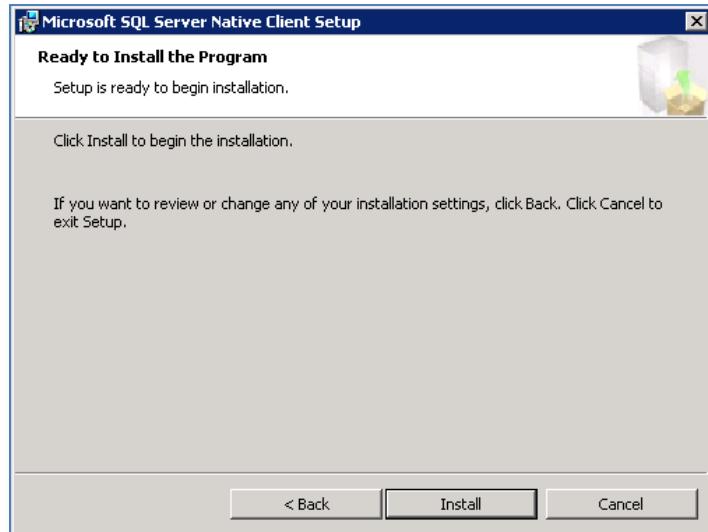


Figure 5 - 35: Ready to Install the Program

5. Click the *Install* button to continue with the installation. The system displays the *Installing Microsoft SQL Server Native Client* progress dialog shown in Figure 5 - 36.

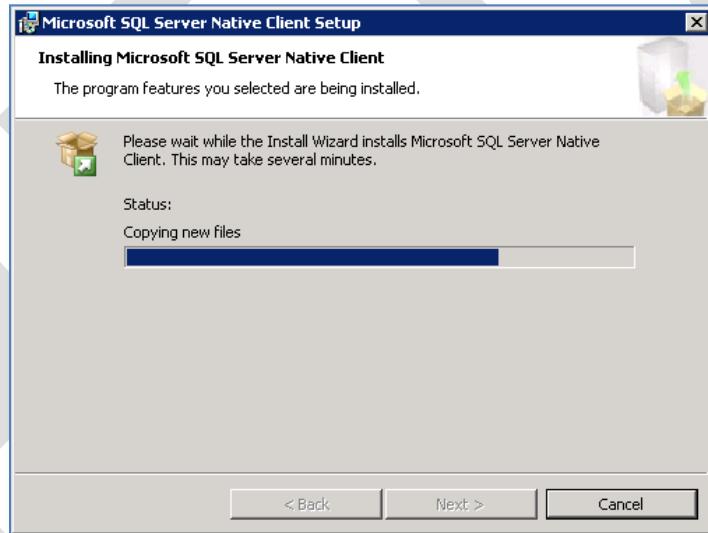


Figure 5 - 36: Installing Microsoft SQL Server Native Client

6. The system displays the progress dialog until the installation is complete. When complete, the system displays the *Completing the Microsoft SQL Server Native Client Setup* dialog shown in Figure 5 - 37.

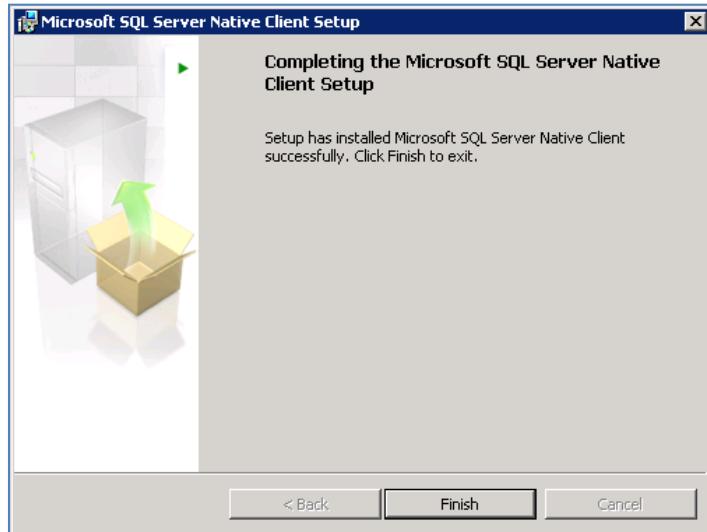


Figure 5 - 37: Completing the Microsoft SQL Server Native Client

7. Click the *Finish* button to close the installation window.

## ***Install the SQL Server Management Objects Collection***

Complete the following steps to install the Microsoft SQL Server 2008 Management Objects Collection:

1. Double click on the MSI file to start the installation. After a brief loading period, the system displays the *Welcome to the Microsoft SQL Server Management Objects Collection Setup* page shown in Figure 5 - 38.



The screens and steps for installing SQL components may change slightly with each new release from Microsoft. Most steps remain the same from version to version.

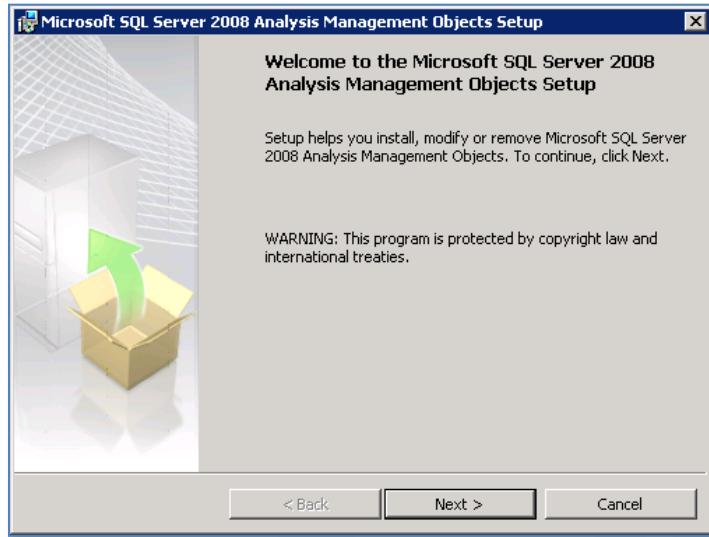


Figure 5 - 38: Install Wizard Welcome page

1. On the *Welcome to the Microsoft SQL Server Management Objects Collection Setup* page, click the *Next* button to continue the installation. The system displays the *License Agreement* page shown in Figure 5 - 39.

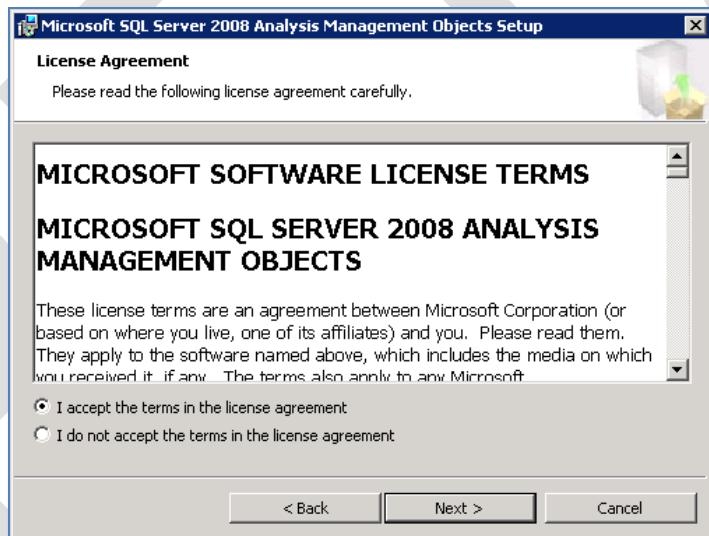


Figure 5 - 39: License Agreement Page

2. On the License Agreement page, read the license agreement. In order to continue you must accept the terms; to accept select the *I accept the terms of this license agreement* option and then click the *Next* button. The system displays the *Registration Information* page shown in Figure 5 - 40.

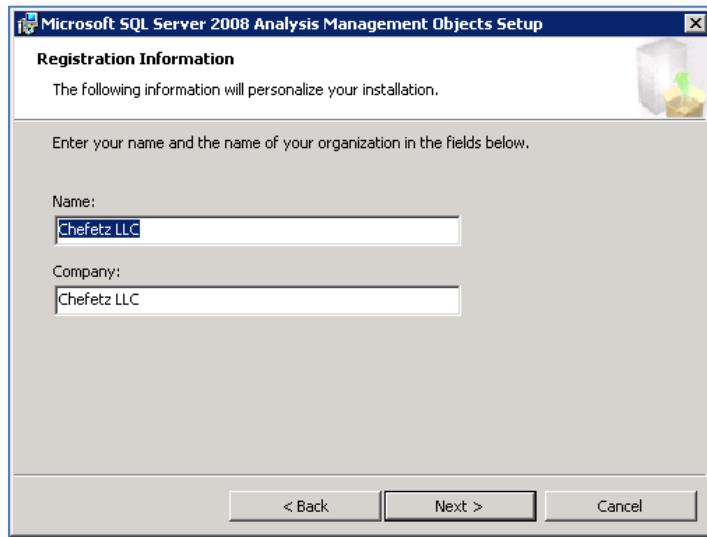


Figure 5 - 40: Registration Information Page

3. On the *Registration Information* page, enter your name and company. Click the *Next* button to continue. The system displays the *Ready to Install the Program* page shown in Figure 5 - 41.

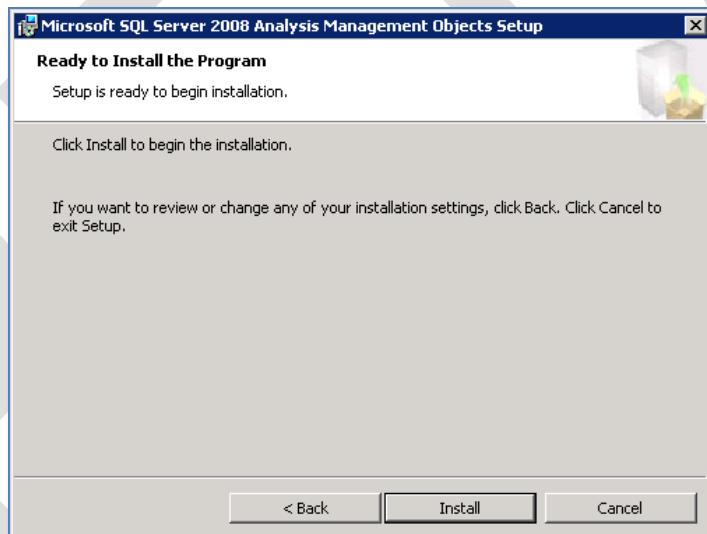


Figure 5 - 41: Ready to Install the Program Page

4. On the *Ready to Install the Program* page, click the *Install* button to continue the installation. The system displays the *Installing Microsoft SQL Server Management Objects Collection* page shown in Figure 5 - 42.

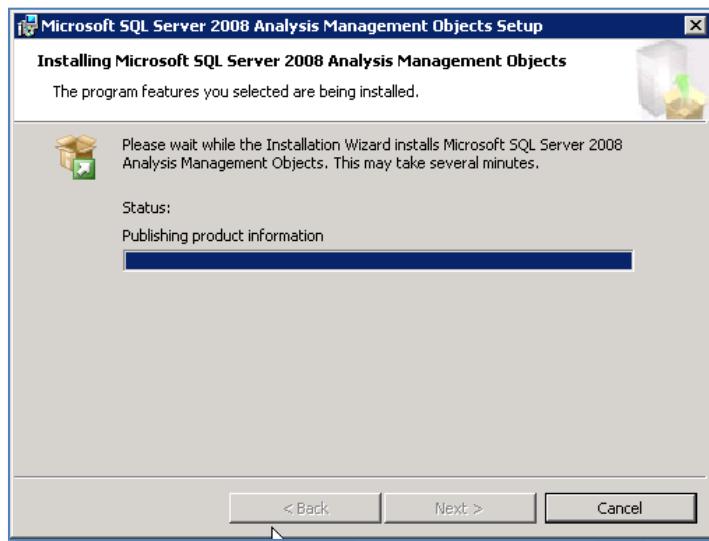


Figure 5 - 42: Installation Progress page

- After the installation completes, the system displays the *Completing the Microsoft SQL Server Management Objects Collection Setup* page shown in Figure 5 - 43. Click the *Finish* button to complete the installation.

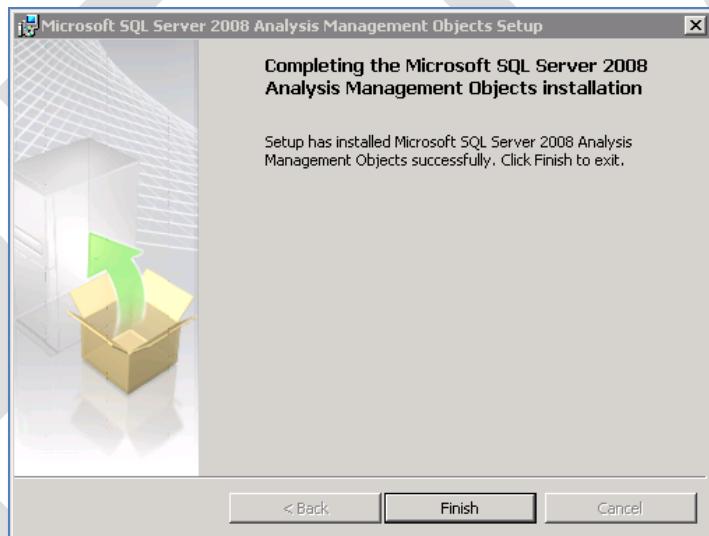


Figure 5 - 43: Completion page



You must restart the Project Server Queue Service after installing the Analysis Management Objects if you install these when Project Server is already installed and running.

## Create a SQL Login for the Service Account Running Analysis Services

The cube building service runs under the OLAP Services account. Therefore, the OLAP Services account also needs *db\_datareader* rights on the Project Server 2010 reporting database. This process is similar to the steps you followed to

create a login for the *Report Authors* global group earlier in this module. If you are using the Farm Administrator account for all services, this step is not necessary as the Farm Administrator account is already the dbo for the databases. To create a login and assign the necessary rights, complete the following steps:

1. Using *SQL Server Management Studio*, connect to the SQL Server instance containing your Project Server reporting database. Expand the *Security* folder and right click on the *Logins* folder and select the *New Login* menu item as shown in Figure 5 - 44.

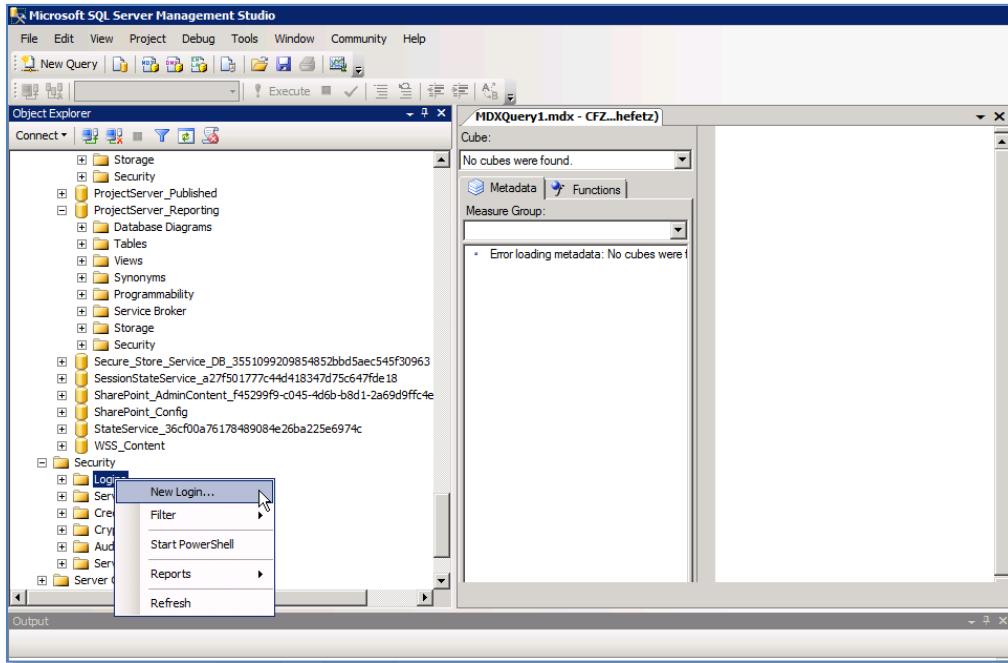


Figure 5 - 44: SQL Server Management Studio New Login

2. The system displays the *Login – New* page shown in Figure 5 - 45.

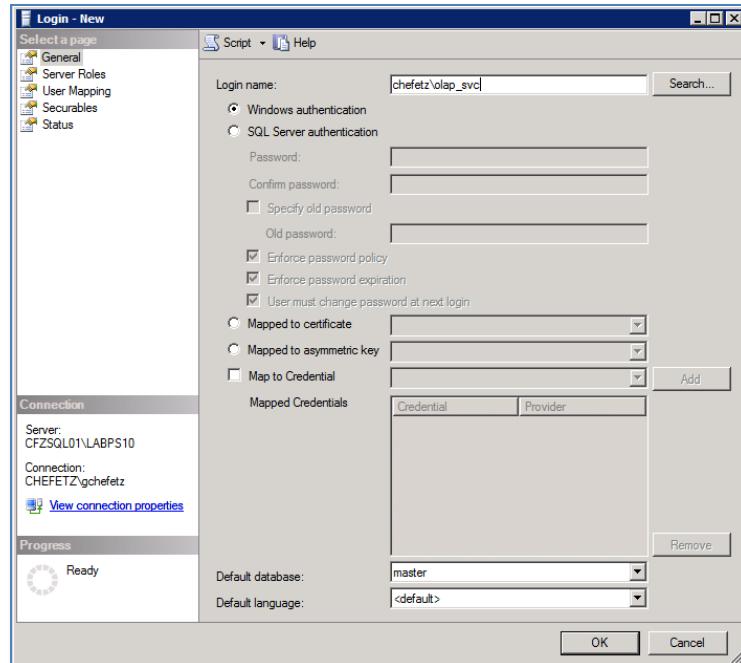


Figure 5 - 45: SQL Server Login – New Page

3. Enter the service OLAP service account information in the *Login name* field and then select the *User Mapping* page by selecting it in the *Select a page* section of the window. The system displays the *User Mapping* page shown in Figure 5 - 46.

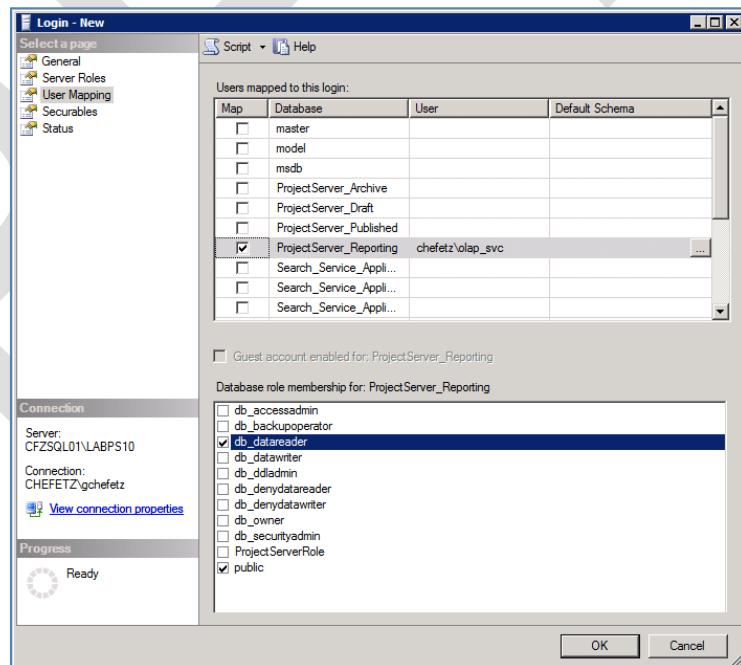


Figure 5 - 46: User Mapping Page

4. In the *Users mapped to this login* section of the window above, select the checkbox for your Project Server Reporting database. In the *Database role membership for <databasename>* section of the window below, select the checkbox for *db\_datareader* and leave the *public* role selected. Click the *OK* button to complete your entry.

## Implement Optional SQL Server Performance Enhancements

There are two SQL Server database settings that are set to OFF by default, but can cause performance issues in your environment if they are turned ON: 1) AUTO\_CLOSE and AUTO\_SHRINK.

### AUTO\_CLOSE

This option is set to OFF by default for both SQL Server 2005 and SQL Server 2008, and in all likelihood you will not have to change it. With the AUTO\_CLOSE option set to ON, the database engine closes and shuts down when all processes in the database complete and the last user exits the database. Project Server makes and breaks connections to SQL Server repeatedly, so using the AUTO\_CLOSE option forces the system to use a lot of overhead to repeatedly reopen the databases and should not be used for Project Server databases.

### AUTO\_SHRINK

This option is set to OFF by default for both SQL Server 2005 and SQL Server 2008. When this option is set to ON, the system marks all of the database's files for shrinking, which causes SQL Server to kickoff a shrink process automatically when more than 25 percent of the file contains unused space. With the option set to ON your production system will suddenly suffer a performance hit when SQL Server decides it is shrink-time.

To verify the status of these settings for your databases, you can use the following queries respectively:

```
SELECT DATABASEPROPERTYEX('DatabaseName', 'IsAutoClose')
GO
SELECT DATABASEPROPERTYEX('DatabaseName', 'IsAutoShrink')
GO
```

The system returns a value of 0 for OFF or 1 for ON. To view these properties for all of your databases, use the following query:

```
SET NOCOUNT ON
SELECT [name] AS DatabaseName
    , CONVERT(varchar(10),DATABASEPROPERTYEX([Name] , 'IsAutoClose')) AS AutoClose
    , CONVERT(varchar(10),DATABASEPROPERTYEX([Name] , 'IsAutoShrink')) AS AutoShrink
FROM master.dbo.sysdatabases
Order By DatabaseName
```

### AUTO UPDATE STATISTICS and AUTO\_UPDATE\_STATISTICS\_ASYNC

By default, the system sets SQL Server databases to enable AUTO UPDATE STATISTICS. This command can run during core business hours when activity on the server is high, affecting performance. With the introduction of SQL Server 2005, Microsoft introduced a new database property, AUTO\_UPDATE\_STATISTICS\_ASYNC, which configures a database to update statistics asynchronously vs. synchronously. Updating statistics synchronously is the default behavior in both SQL Server 2005 and 2008. In synchronous mode, if a query request triggers an AUTO UPDATE STATISTICS event, the query must wait for the system to update the statistics. Once the system completes updating the statistics, the system executes the query. However, if you enable the AUTO\_UPDATE\_STATISTICS\_ASYNC property, the query executes immediately against the existing statistics. At the same time a background request tells the data-

base engine to update the statistics automatically as soon as possible, without preventing any query requests. When the background operation completes, new query requests begin using the new statistics information. This option affects only AUTO UPDATE STATISTICS events, not manually requested statistic updates or statistic updates scheduled through a SQL maintenance plan. To set these property values using SQL Query Manager use the following queries respectively:

```
ALTER DATABASE DatabaseName SET AUTO_UPDATE_STATISTICS ON
GO
ALTER DATABASE DatabaseName SET AUTO_UPDATE_STATISTICS_ASYNC ON
GO
```

To change the status of these settings using *SQL Server Management Studio*, expand the tree in *Object Explorer*, locate your database, and right click on the database name and select *Properties* from the popup menu. The system displays the *Database Properties* page. In the *Select a Page* pane on the left, select *Options*. Your *Database Properties* window should appear similar to Figure 5 - 47.

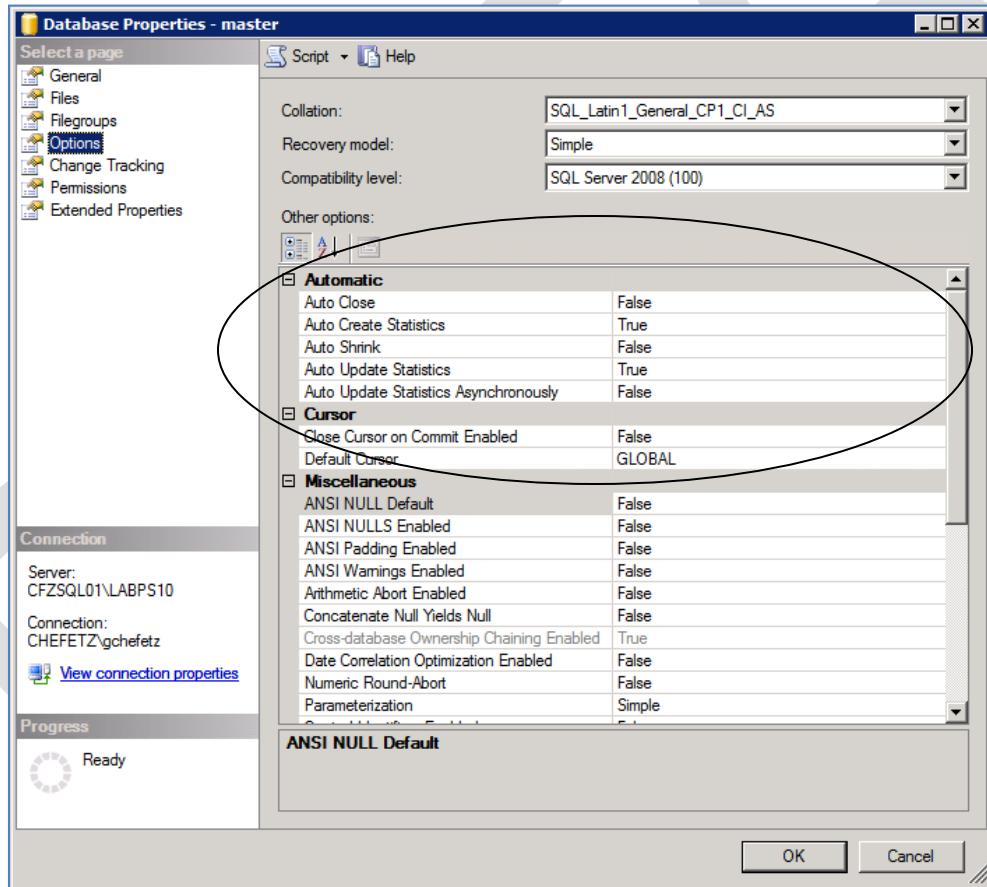


Figure 5 - 47: Database Properties Window Options Page Displayed with Default Settings

In the *Automatic* options section, set your desired values by clicking into the value column and selecting your value from the dropdown list.

## Create Additional TempDB Files

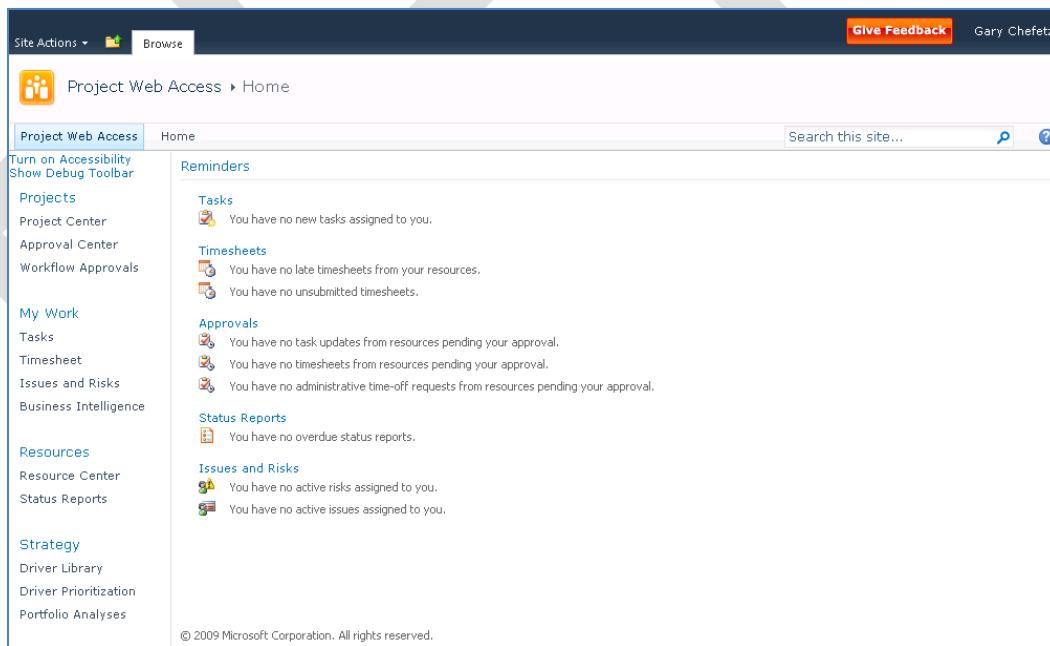
Both Project Server 2010 and Microsoft SharePoint Server 2010 make extensive use of TempDB during SQL transactions. To optimize performance, create additional TempDB files. To improve performance, create an additional TempDB file for each processor (core) in the computer running SQL Server. Create the files on a separate partition from other database files.

## Verify Project Server Functionality

Now that the installation and initial configuration process is complete, you should verify system functionality and connectivity. If you have not already done so, you must install the Project Professional 2010 client on at least one workstation to complete the work in this module. Make sure that you apply the same Service Pack level to both the client and the server.

### Verifying Project Web Access Connectivity

Log in to your workstation using the account that you designated as the Farm Administrator, which is the only account that has access to the your Project Web Access site at this time. Enter the URL for your new Project Server installation in your browser to verify that your new Project Web Access site loads from a system on your network other than the server where it is installed. The system displays your home page as shown in Figure 5 - 48. Note that the system welcomes you by login name at the top right of the page.



**Figure 5 - 48: Project Web Access Home page for an administrator**

You should see a page that has nothing to report in the Reminders section. Figure 5-48 reflects a first-time login to a Project Server instance without any data.

## Creating a Login Account in Project Professional 2010

During the installation process, Project Server 2010 creates a single Project Server user, which is an administrator-level account. It uses the Windows account that you specified during the installation process in Module 04; typically this is the *Farm Service Account*. Because your administrator toolkit includes both Project Professional 2010 and Project Web Access, you must be able to connect to Project Server using Project Professional 2010. Before you can use Project Professional 2010 in your Project Server environment, you must create a login account for the Project client application on your local machine.



If you did not specify your own login account during the installation process, you should log in to your workstation using the account you specified as the Project Server Administrator, or first create an account for yourself on the Project Server instance. I cover creating resources and users in ModuleXX.

You have two options available to you for creating a Project Server login account. You can do this by launching the *Microsoft Project Server 2010 Accounts* tool under the *Office Tools* folder in the *Office* folder from your start menu, or you can launch Project Professional 2010 and complete the following steps:

1. From Project Professional 2010, click the new *File* tab and select the *Info* selection on the left hand navigation menu, and then select the *Manage Accounts* button in the *Project Server Accounts* section of the page shown in Figure 5 - 49.

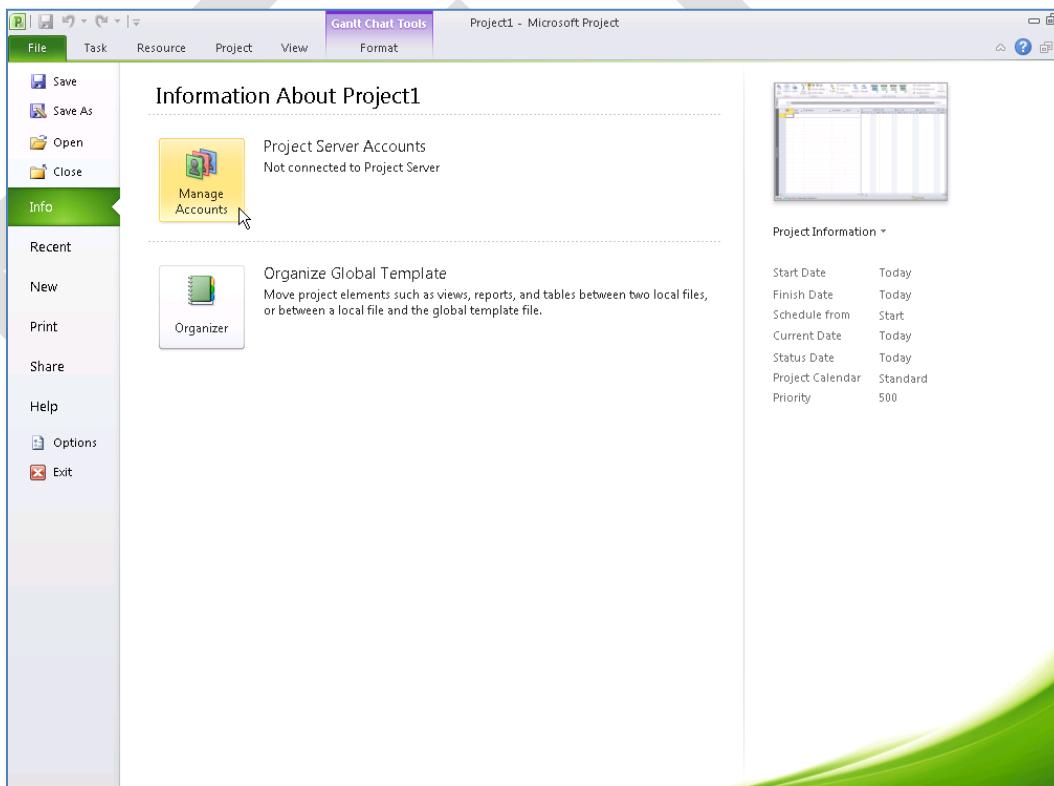
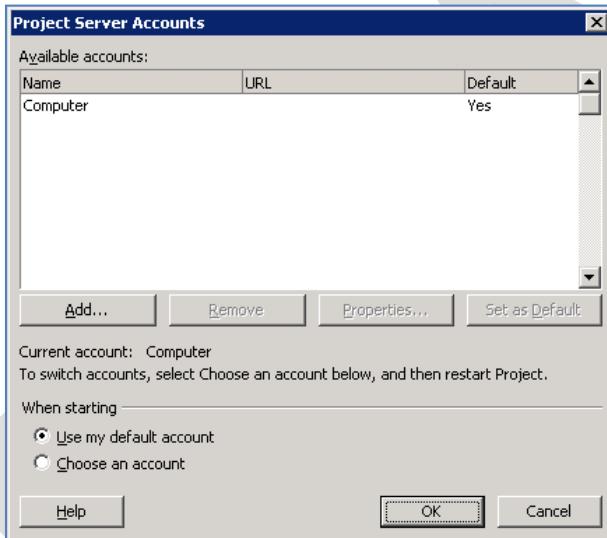


Figure 5 - 49: Project 2010 Information Page



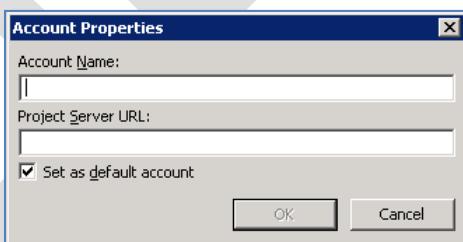
Notice that the Information Page carries two types of content: 1) Navigation tools for accessing Project Server accounts and the organizer and 2) Summary information about the current project. If you close the default Project 1 file, the system displays only the navigation buttons and the title becomes simply "Information."

2. After you click the *Manage Accounts* button, the system displays the *Project Server Accounts* dialog shown in Figure 5 - 50.



**Figure 5 - 50: Project Server Accounts dialog**

3. Project Server 2007 users will notice that Microsoft updated this dialog for Project 2010. Click the *Add* button and the system displays the *Account Properties* dialog shown in Figure 5 - 51.



**Figure 5 - 51: Account Properties dialog**

4. Enter a friendly name for your new account in the *Account Name* field and enter a valid URL in the *Project Server URL* field. You must enter the URL with the **http:// or https://** prefix. Select the *Set as default account* option. Figure 5 - 52 shows the completed Account Properties dialog for the new account that connects to my organization's Production Project Server instance.



Figure 5 - 52: Completed Account Properties dialog

5. Click the *OK* button. If you enter a URL using the `http://` protocol rather than the secure `https://` protocol, the system displays the warning dialog shown in Figure 5 - 53. Ignore the warning unless your server requires a secure URL. Click the *Yes* button to continue if you see this warning.

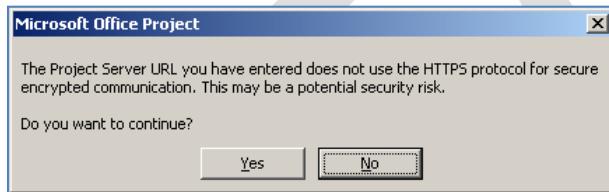


Figure 5 - 53: Security warning dialog

6. The system redisplays the *Project Server Accounts* dialog with your new account, as shown in Figure 5 - 54.

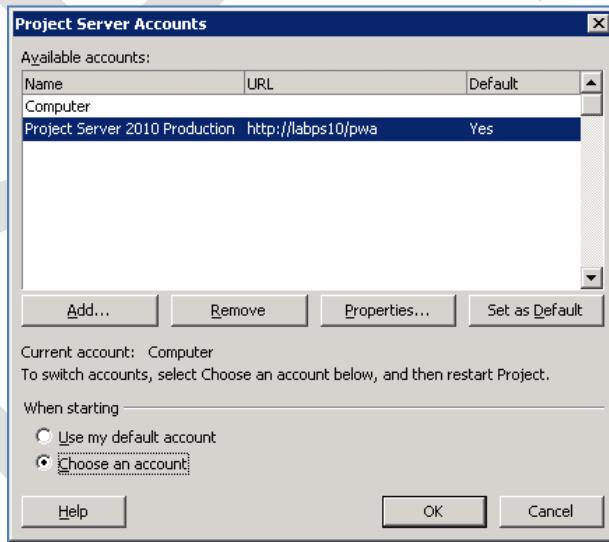


Figure 5 - 54: Project Server Accounts dialog with new account

7. In the *Project Server Accounts* dialog, select the *Choose an account* option. This is particularly important if you connect to multiple Project Server instances and if you want to completely control the connection state.



MSProjectExperts recommends that you always select the *Choose an account* option. This provides better control for users who connect to multiple instances and allows for better control of off-line feature use.

8. Create an additional Project Server login account for each instance of your Project Server 2010 system, such as for test or training Project Server instances, and then click the *OK* button.

After you create your Project Server login account profiles in Project Professional 2010, exit and then re-launch the software. This is a necessary step because creating your login accounts does not connect you to a Project Server instance. The system displays the *Login* dialog shown in Figure 5 - 55. Because you selected the *Choose an account* option in the *Project Server Accounts* dialog, the system allows you to select the Project Server instance for connection. Had you not chosen this option, the system automatically connects to the instance you set as default.



Figure 5 - 55: Login dialog

The *Login* dialog pre-selects the account you set as the Default account in the Project Server Accounts dialog. If you wish to connect using a different login account, click the *Profile* pick list and select a different account as shown in Figure 5 - 56. Note that the first time you connect to a Project Server instance, the *Work Offline* option is not available.



Figure 5 - 56: Select a different Profile



You can select the *Computer* profile to use Project Professional 2010 without connecting to a Project Server instance. This causes the software to function in “desktop only” mode and disables all enterprise features.

Click the *OK* button to connect with your desired Project Server instance. If the system cannot connect to the selected Project Server instance, it displays the *Could not connect to Server* dialog shown in Figure 5 - 57.



Figure 5 - 57: Could not connect to Server warning

If you see the dialog shown in Figure 5-57, click the *Cancel* button to return to the *Login* dialog and then click the *Cancel* button in the *Login* dialog. At this point, you must troubleshoot the cause of the login problem, which is likely one of the four possible reasons previously shown in the *Could not connect to Server* warning.

## Performing Basic Functional Tests

Now that you have verified basic Project Server connectivity in Project Professional 2010, it is time to confirm that you can exercise basic system input, such as creating, saving, and publishing a project. To verify that you can create and save a project, launch Project Professional 2010 and select the login account that you created in the last section of this module. Use the Project 1 file that Project opens automatically, or click on the *File* tab and select the *New* link from the side menu as shown in Figure 5 - 58.

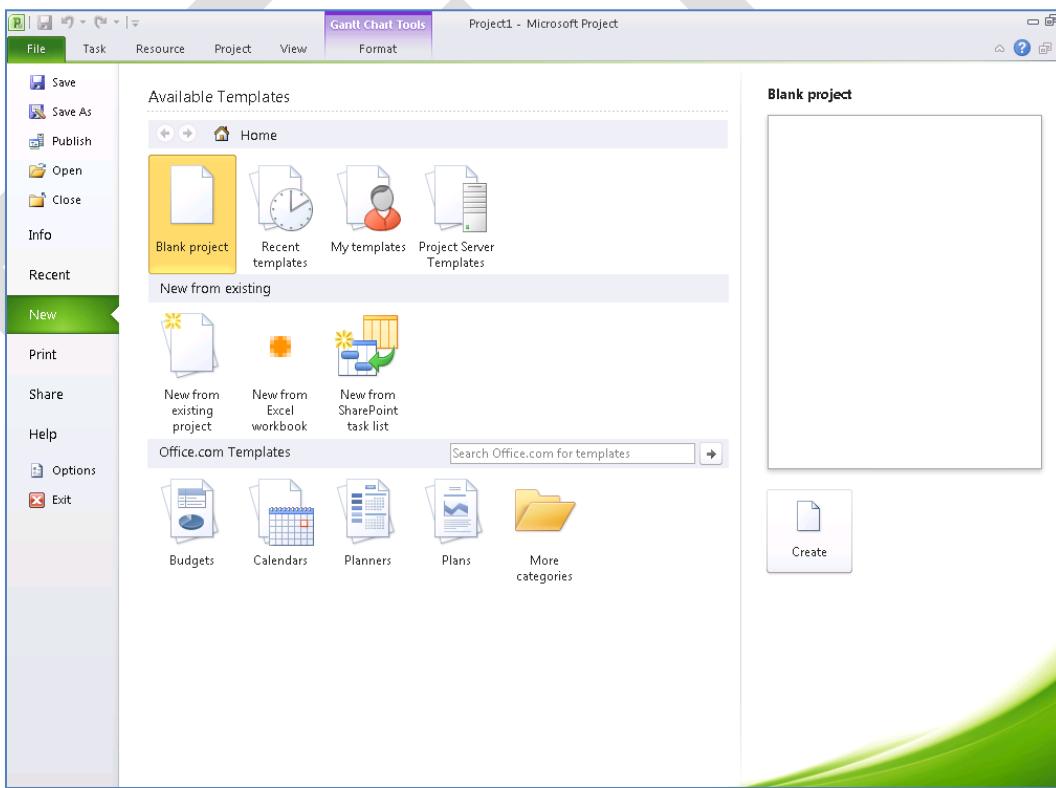


Figure 5 - 58: Project Professional with New Project options displayed

In the *Available Templates* section, click the *Blank project* link. The system opens the blank project as shown in Figure 5-59.

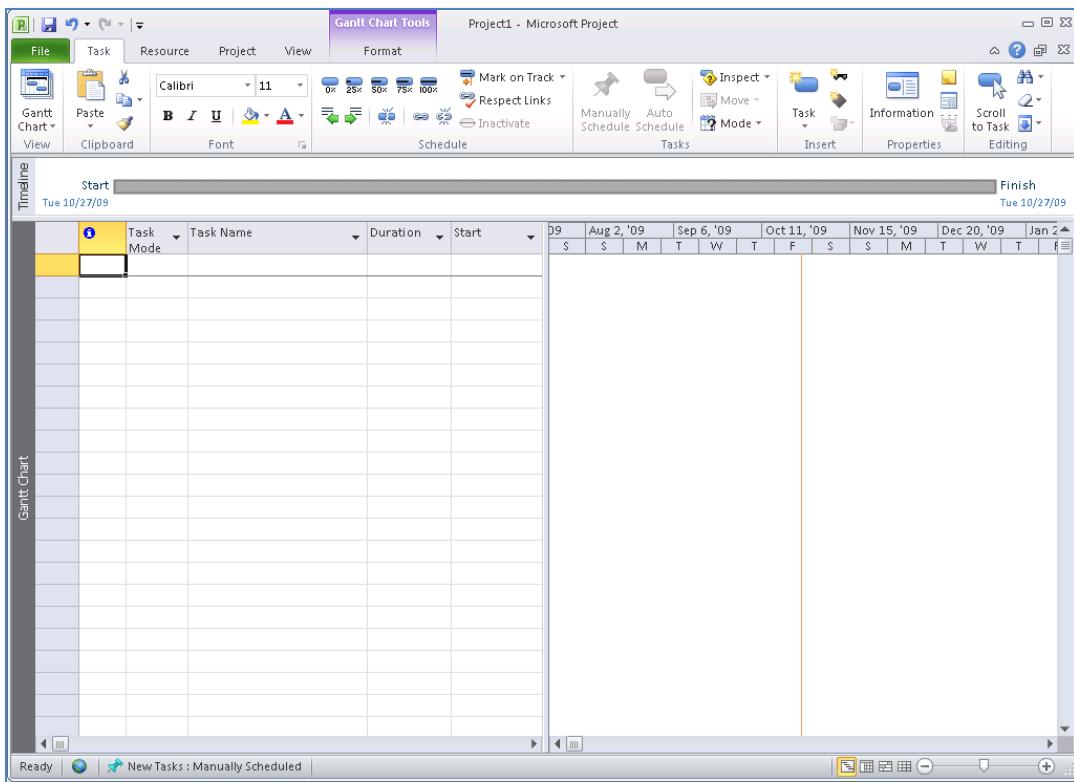


Figure 5 - 59: New Project

Add a few tasks to your new project. Click File > Save and the system displays the *Save to Project Server* dialog shown in Figure 5 - 60.

Note that unless you have selected otherwise, the system defaults all new tasks to “Manually Scheduled,” which is a new feature in Project Server 2010. To learn about *Manually Scheduled* tasks and the other new features in Microsoft Project Professional 2010, refer to the *Ultimate Learning Guide to Microsoft Project 2010: Foundations*, ISBN: 978-1-934240-13-7.

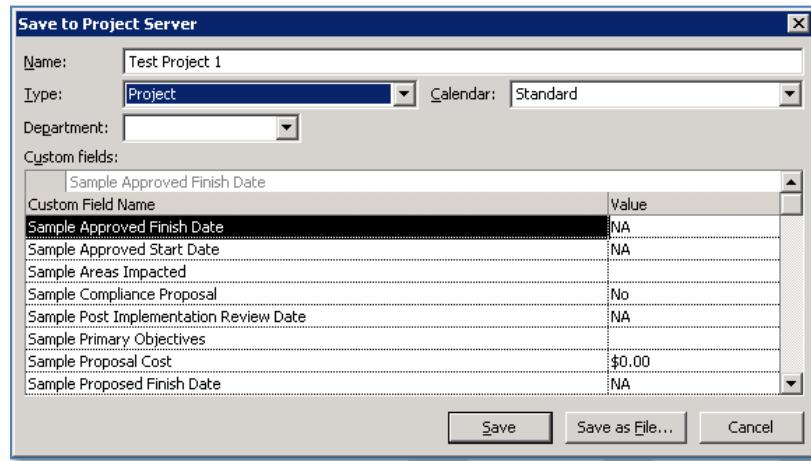


Figure 5 - 60: Save to Project Server

Enter a name for your test project in the *Name* field and then click the *Save* button. Watch the message in the lower tray of the application frame where the system reports the save status as shown in Figure 5 - 61. Wait until you see the message "Save completed successfully."

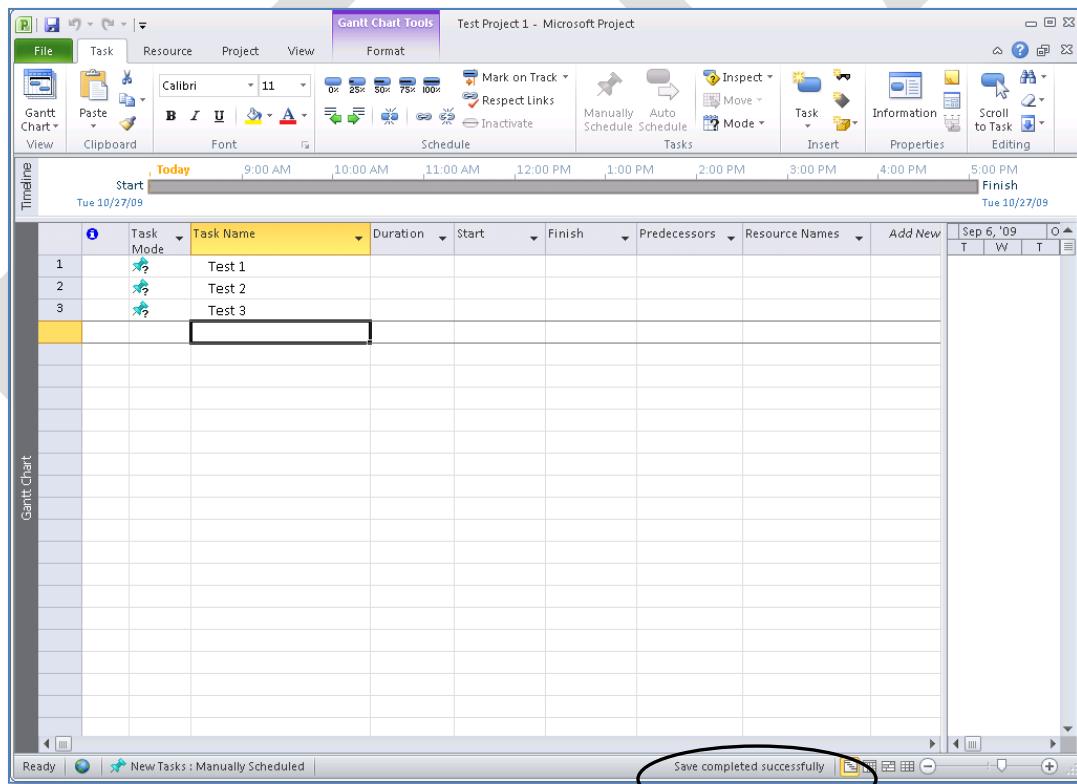


Figure 5 - 61: Save completed successfully

Next, build a team using enterprise resources in the Enterprise Resource Pool. Select the *Resource* tab and click the *Add Resources* button and select the option to *Build Team from Enterprise* on the menu as shown in Figure 5 - 62.

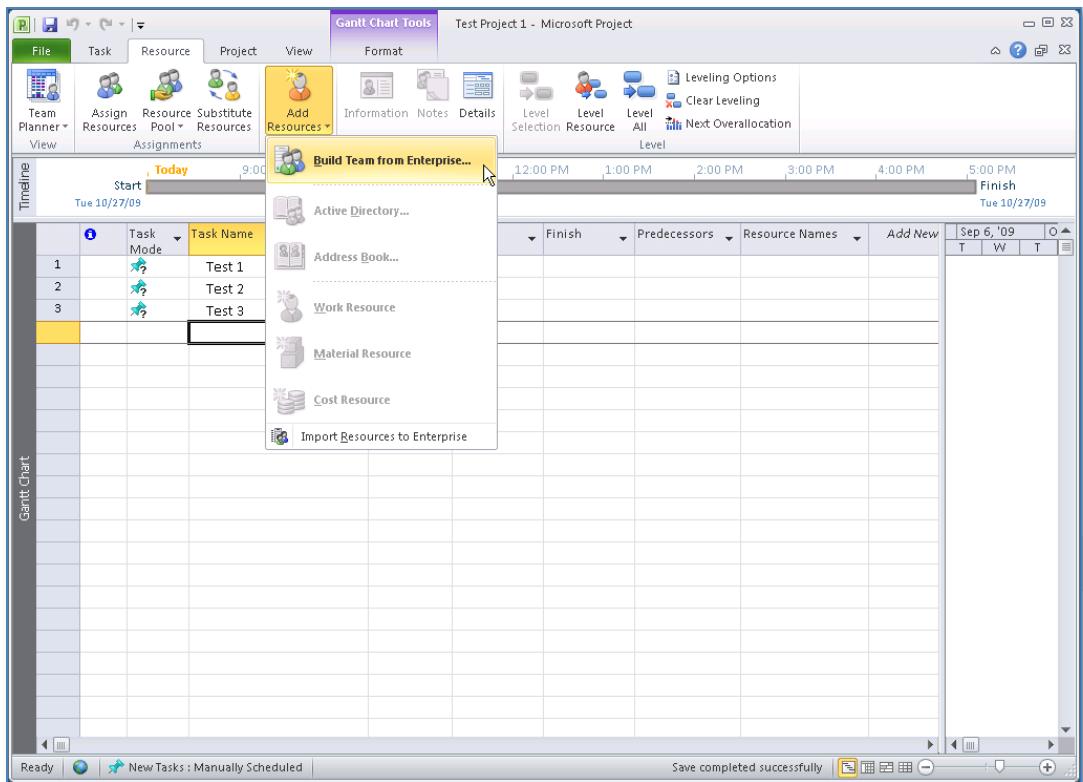


Figure 5 - 62: Add resources to project

The system opens the *Build Team* dialog shown in Figure 5 - 63.

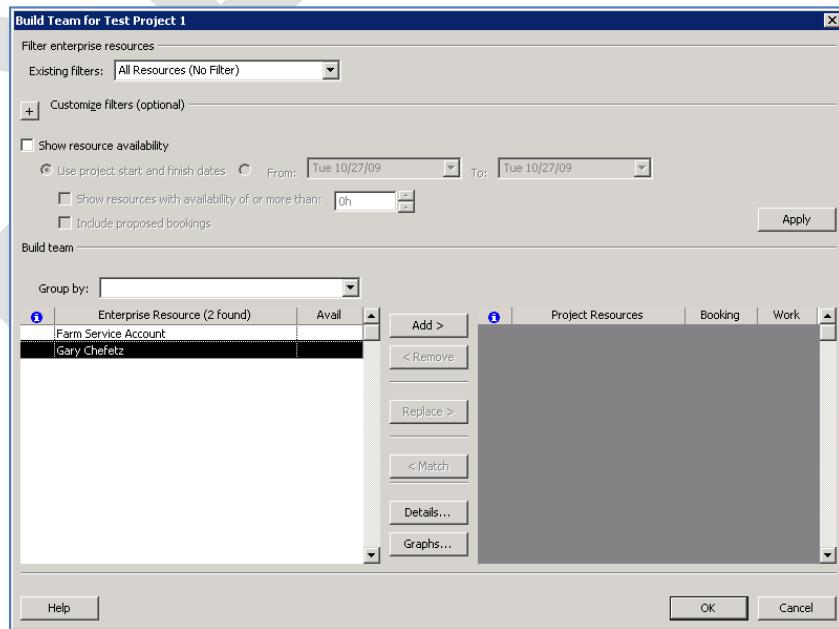


Figure 5 - 63: Build Team dialog

The dialog should contain only one resource, which is your current login. Select the account representing your current logon on the left, and click the *Add* button in the center of the dialog to add this resource to the team. Click the *OK* button to complete the action. In your new project schedule, add the current resource to the test tasks you entered in your project using the *Resource Names* field as shown previously in Figure 5-62. Note that assigning resources using this method is not a best practice for your users, but it is adequate for testing purposes.

Next, click on the *Project* tab and then click the *Project Information* button to display the Project Information dialog. In the *Start* field, set the project start date to today using the date picker and then click the *OK* button. Click on the *File* tab and select the *Publish* link to publish the project. The system displays the *Publish Project* dialog shown in Figure 5-64.

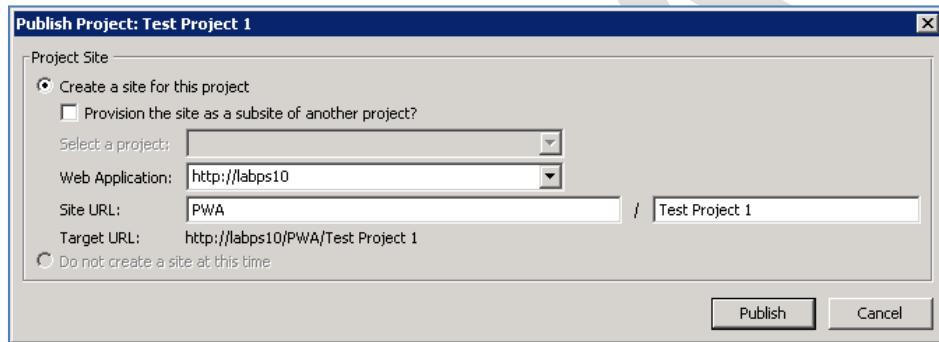


Figure 5 - 64: Publish Project dialog

Accept the defaults in the dialog and click the *Publish* button to continue. The system announces the publish status and percentage in the Status bar at the bottom of the application window. When the system indicates that the Publish job completed successfully, click *File > Close*. The system displays the dialog shown in Figure 5 - 65.

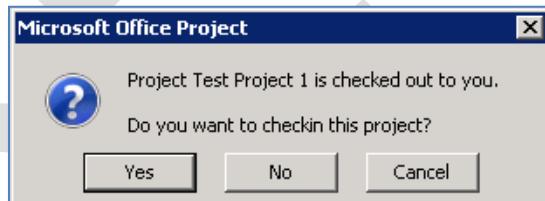


Figure 5 - 65: Check-in dialog

Click the *Yes* button to check in the project schedule. Launch your Internet Explorer application, if necessary, and navigate to your Project Server home page. The page should now look something like the page shown in Figure 5 - 66. Notice that you now have one or more new tasks assigned to you as highlighted in the figure.

The screenshot shows the Project Web Access home page. On the left, there is a navigation menu with sections like Turn on Accessibility, Projects, My Work, Resources, Strategy, and Settings. The main content area is titled 'Reminders' and contains several sections: 'Tasks' (with a message 'You have 3 new tasks assigned to you.'), 'Timesheets' (with messages about late and unsubmitted timesheets), 'Approvals' (with messages about task updates, timesheets, and administrative requests), 'Status Reports' (with a message about overdue status reports), and 'Issues and Risks' (with messages about active risks and issues). A large oval highlights the 'Tasks' section. At the bottom, there is a copyright notice: '© 2009 Microsoft Corporation. All rights reserved.'

**Figure 5 - 66: Project Web Access home page after publishing a test project**

Click the *Tasks* link in the *My Work* section to go to the *Tasks* page shown in Figure 5 - 67. You should see the new assignment(s) in the *Tasks* page.

The screenshot shows the 'Tasks' page. The navigation menu on the left includes 'Project Center', 'Approval Center', 'Workflow Approvals', 'My Work' (with 'Tasks' selected), 'Resources', 'Strategy', and 'Settings'. The main area displays a grid of tasks. The first row is a header for 'In Progress for Current Period'. Below it, three tasks are listed under 'Test Project 1': 'Test 1' (status NEW, start 10/27/2009, finish 10/27/2009, duration 8h, work 0%, actual 0h), 'Test 2' (status NEW, start 10/28/2009, finish 10/28/2009, duration 8h, work 0%, actual 0h), and 'Test 3' (status NEW, start 10/29/2009, finish 10/29/2009, duration 8h, work 0%, actual 0h). The grid has columns for Task Name, Start, Finish, Remain, % Work, Work, Actual, and Process St.

**Figure 5 - 67: Tasks page showing new task assignments**

Click the *Project Center* link from the Quick Launch menu. The system opens the *Project Center* page shown in Figure 5 - 68.

The screenshot shows the Project Center page. On the left, there's a navigation menu with sections like Projects, My Work, Resources, Strategy, and Settings. The main area displays a grid of projects. A single row for 'Test Project 1' is selected, showing its details: Project Name, Start Date, Finish Date, and % Complete. Above the grid, the ribbon has tabs for Site Actions, Browse, and Projects. In the Projects tab, there are several buttons: New, Build Team, Check in My Projects, Zoom In, Zoom Out, Outline, Summary, No Filter, No Group, Export to Excel, Print, Share, Show/Hide, and Change. The 'Project Site' button is specifically highlighted with a yellow circle.

Figure 5 - 68: Project Center Page

On the *Project Center* page, make sure that your test project is selected in the grid, or select the project by clicking on the row header. You can also select any cell in the row that does not contain a hyperlink. If you click a cell with a hyperlink, you will navigate away from the page. In the *Navigate* section in the menu, click the *Project Site* button to navigate to your new Project site. The system displays you new site as shown in Figure 5 - 69.

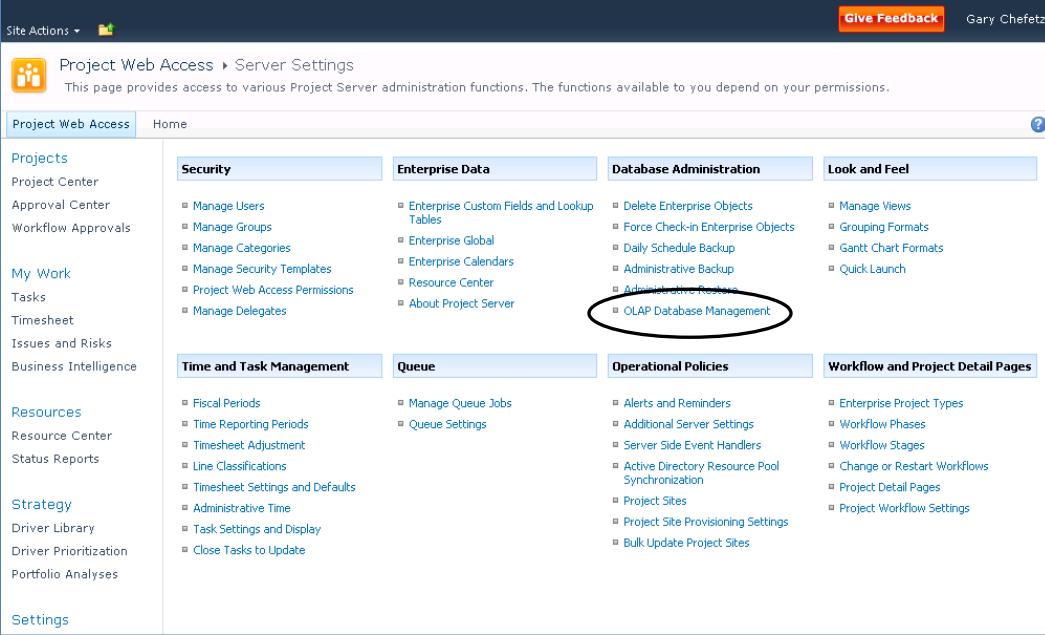
The screenshot shows the 'Test Project 1' SharePoint site. The left sidebar contains links for Documents, Lists, Discussions, and Sites. The main content area has several sections: 'Documents' (Project Documents), 'Announcements' (with a link to 'Get Started with Microsoft SharePoint Foundation'), 'Calendar' (which is currently empty), and 'Links' (which also is currently empty). The Microsoft Windows SharePoint Services logo is visible in the top right corner.

Figure 5 - 69: New Project Site

Once you verify that the Project site displays properly, use the *Navigate Up*  button to return to the Project Web Access home page. You have now verified basic Project Server functionality by proving that you can create, save, and publish a project, and that the data is flowing through the system correctly.

## Verify Cube Building Capability

Now that you have verified basic functionality for Project Server 2010, you should also verify your ability to build OLAP cubes by configuring your analysis services connection and initiating the first build. To set up the OLAP cube building parameters in the system, navigate to your Project Web Access home page and click the *Server Settings* link in the Quick Launch menu. The system displays the *Server Settings* page shown in Figure 5 - 70.



The screenshot shows the 'Server Settings' page in Project Web Access. The left sidebar lists categories like Projects, My Work, Resources, Strategy, and Settings. The main content area has tabs for Security, Enterprise Data, Database Administration, Look and Feel, Time and Task Management, Queue, Operational Policies, and Workflow and Project Detail Pages. The 'Database Administration' tab is selected. Under it, there are several links: Manage Users, Manage Groups, Manage Categories, Manage Security Templates, Project Web Access Permissions, Manage Delegates, Enterprise Custom Fields and Lookup Tables, Enterprise Global, Enterprise Calendars, Resource Center, About Project Server, Delete Enterprise Objects, Force Check-in Enterprise Objects, Daily Schedule Backup, Administrative Backup, Administrative Reports, and OLAP Database Management. The 'OLAP Database Management' link is circled in red.

Figure 5 - 70: Server Settings Page

In the *Database Administration* section of the *Server Settings* page, click the *OLAP Database Management* link. The system displays the *OLAP Database Management* page shown in Figure 5 - 71.

The screenshot shows the Project Web Access interface for managing OLAP databases. The top navigation bar includes 'Site Actions', 'Give Feedback', and 'Gary Chefetz'. The main title is 'Project Web Access > OLAP Database Management' with the subtitle 'Create, configure, build and delete OLAP Databases.' Below the title is a breadcrumb trail 'Project Web Access > Home'. On the left, a vertical navigation menu lists 'Projects', 'My Work', 'Resources', 'Strategy', and 'Settings'. The main content area displays a table titled 'OLAP Database Management'. The table has columns: OLAP Database Name, Server Name, Status, Last Built, Default, Enable, and Schedule. A single row is shown with the following data:

OLAP Database Name	Server Name	Status	Last Built	Default	Enable	Schedule	Description
DatabaseName	ServerName	Not Built		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	Build occurs every 1 day Effective on 10/16/2009 at 11:00 PM	

Below the table are several action buttons: 'New', 'Configuration', 'Copy', 'Delete', 'Build Now', and 'Refresh'.

Figure 5 - 71: OLAP Database Management Page

Notice that Project Server 2010 now supports multiple cube building programs, which you manage from this page. By default, the system creates a single cube configuration entry with generic names. You must configure this entry to actually build a cube. To configure the build setting for a cube for the first time, click the *DatabaseName* link below the *OLAP Database Name* header column. The system displays the *OLAP Database Build Settings* page shown in Figure 5 - 72.

The screenshot shows the 'OLAP Database Build Settings' page in Project Web Access. The 'Analysis Services Settings' section requires entering the 'Analysis Services Server' (ServerName) and 'Analysis Services Database to be created' (DatabaseName). The 'Project Department' and 'Resource Department' sections allow selecting departments for filtering. The 'Database Date Range' section offers three options: using project start and finish dates, specifying a time unit range ('Last' and 'Next'), or defining a fixed date range ('From' and 'To'). The 'OLAP Database Update Frequency' section includes checkboxes for 'Update periodically' and 'Immediately retry the OLAP database update if scheduled time fails because of queue down time'. It also specifies 'Update every' (1 day), 'Start date' (10/27/2009), and 'Start time' (11:00 PM). The current server date/time is shown as 10/27/2009 4:25 PM.

Figure 5 - 72: OLAP Database Build Settings

Enter your Analysis Services machine name in the *Analysis Service Server* field. In the *Analysis Services Database to be created* field, enter a name for the cube database (example: <PWAInstanceName>) you want to create. Note that there are two new sections on this page, *Project Department* and *Resource Department*. These allow filtering by department, a new feature in Project Server 2010 that I cover in depth in Module XX. For now, ignore these selections as you must configure your system to use department filtering correctly. Accept the default selection of *Use the earliest project start date and the latest project finish date* option in the *Database Date Range* section. For now you can either accept the default selections in the *OLAP Database Update Frequency* section or deselect the *Update Periodically* check box, as there is no sense in wasting server resources until you have actual data in the system. Click the *Save* button to save your cube build settings. The system re-displays the *OLAP Database Management* page reflecting your changes shown in Figure 5 - 73.

The screenshot shows the 'Project Web Access > OLAP Database Management' page. On the left, there's a navigation menu with sections like 'Projects', 'My Work', 'Resources', 'Strategy', and 'Settings'. The main area displays a table titled 'OLAP Database Management' with columns: OLAP Database Name, Server Name, Status, Last Built, Default, Enable, Schedule, and Description. A single row is visible for 'Cube1', which is configured to use server 'cfsql01\lapps10' and has 'Enable' and 'Default' checked. Buttons at the top of the table allow for 'New', 'Configuration', 'Copy', 'Delete', 'Build Now', and 'Refresh'.

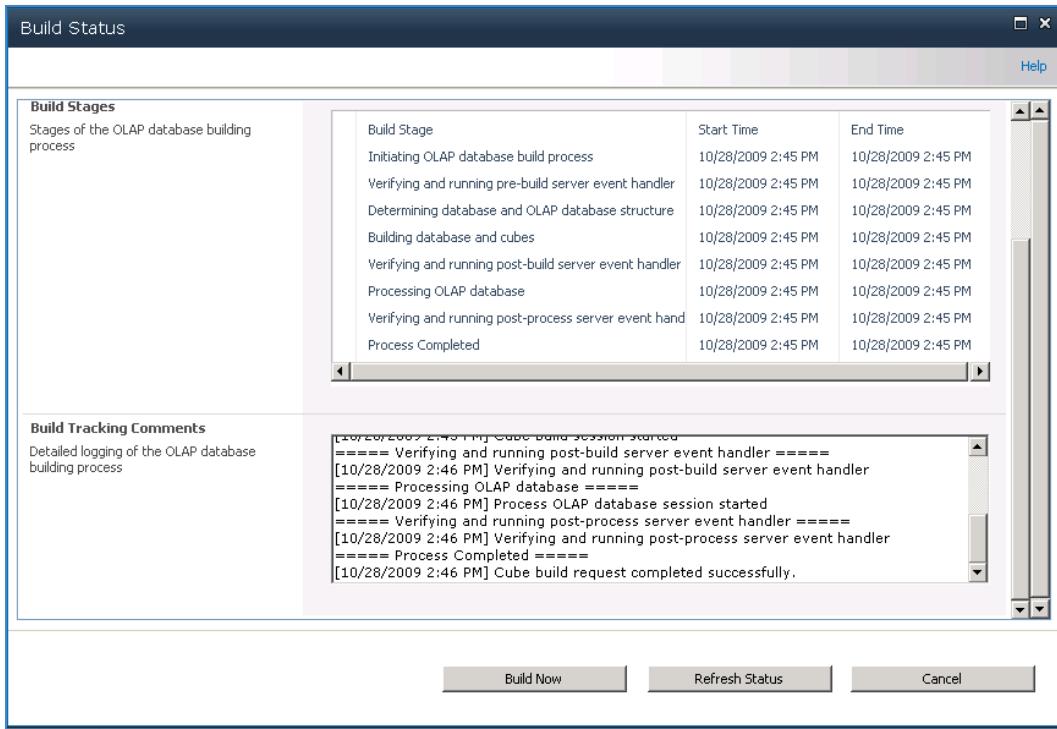
**Figure 5 - 73: OLAP Database Management page with saved settings**

On the *OLAP Database Management* page, select the Cube configuration that you just created and click the *Build Now* button. Notice that the *Status* column changes to *Processing*. If you would like to follow the build progress, click the *Processing* link to open the *Build Status* window shown in Figure 5 - 74.

The screenshot shows the 'Build Status' window. It contains three main sections: 'OLAP Database Build Settings' (with details like 'Server: cfsql01\lapps10' and 'Analysis Services Database to be created: Cube1'), 'Build Stages' (listing a single stage 'Initiating OLAP database build process' with start time '10/27/2009 5:22 PM'), and 'Build Tracking Comments' (containing the message '===== Initiating OLAP database build process ====='). At the bottom are buttons for 'Build Now', 'Refresh Status', and 'Cancel'.

**Figure 5 - 74: OLAP Cube Build Status**

When the cube build completes successfully, your *Build Status* page should look something like Figure 5 - 75.



**Figure 5 - 75: Build Status window displaying successful cube build completion**

When your initial cube build succeeds, your system is ready to deliver analysis on the portfolio of projects you will soon add to the server. The initial cube build takes practically no time at all because you have only one resource and one project in your database. Expect this process to take **much longer** as you build up your database of projects and resources. You should revisit the cube settings options after you determine the best time to run the cube building routine, when it does not conflict with other service windows on the server such as daily backups. For now, you have accomplished what you need to verify your configuration; however, you will return to the cube configuration later in the configuration process, after you have configured your system with the custom taxonomic information that makes the information in the cubes interesting and applicable to your users.

## Verify Reporting Capability in the BI Center

The final verification step that I suggest you take before proceeding with your Project Server configuration is to verify that your Business Intelligence Center is functioning correctly and you are able to make connections to the sample reports. From Project Web Access, select the *Business Intelligence* link from the *My Work* section of the Quick Launch menu. The system displays the *Business Intelligence Center* home page shown in Figure 5 - 76.

## Module 05

The screenshot shows the SharePoint Business Intelligence Center home page. The left navigation menu includes links for Project Web Access, Home, Dashboards, Data Connections, Documents, Sample Reports, Templates, PerformancePoint Content, Recycle Bin, and All Site Content. The main content area features several sections: 'Business Intelligence Center' (describing its purpose), 'Add Insight to Information With Dashboards' (with a link to 'Start using PerformancePoint Services'), 'Monitor Key Performance' (describing scorecards and status lists), 'Build and Share Reports' (describing publishing Excel workbooks), and 'Create Dashboards' (describing SharePoint dashboards). A search bar and a 'Give Feedback' button are also present.

Figure 5 - 76: Business Intelligence Center home page

From the menu on the left, click on the *Sample Reports* link. The system displays the *Sample Reports* page shown in Figure 5 - 77.

The screenshot shows the SharePoint Sample Reports home page. The left navigation menu includes links for Project Web Access, Home, Dashboards, Data Connections, Documents, Sample Reports (which is selected and highlighted in blue), Templates, PerformancePoint Content, Recycle Bin, and All Site Content. The main content area displays a table with one item: 'English (United States)' under the 'Name' column, with '10/16/2009 11:47 AM' under 'Modified' and 'System Account' under 'Modified By'. A link to 'Add new document' is also visible.

Figure 5 - 77: Sample Reports home page

Click the link named *English (United States)* or the appropriate sample reports link for your installation language. The system displays the sample reports page for the language you choose, in my case English as shown in Figure 5 - 78.

Type	Name	Modified	Modified By
Deliverables	10/16/2009 11:47 AM	System Account	
IssuesAndRisks	10/16/2009 11:47 AM	System Account	
MilestonesDueThisMonth	10/16/2009 11:47 AM	System Account	
RejectedProjectsList	10/16/2009 11:47 AM	System Account	
ResourceCapacity	10/16/2009 11:47 AM	System Account	
SimpleProjectsList	10/16/2009 11:47 AM	System Account	
TimesheetActuals	10/16/2009 11:47 AM	System Account	
TopProjects	10/16/2009 11:47 AM	System Account	
WorkflowChart	10/16/2009 11:47 AM	System Account	
WorkflowDrillDown	10/16/2009 11:47 AM	System Account	

Figure 5 - 78: Sample Reports for English

Select the *SimpleProjectList* link to load the *Simple Projects List* report shown in Figure 5 - 79. When the system prompts to refresh external data connections, click the *Yes* button to proceed with displaying the report.

ProjectName	ProjectOwnerName	ProjectModifiedDate	ProjectStartDate	ProjectFinishDate
Test Project 1	Gary Chefetz	10/27/2009	10/27/2009	11/2/2009

Figure 5 - 79: Simple Projects List report

You should see the test project that you created earlier in this module showing in the report. You can also test the *Resource Capacity* report which will contain only one resource at this time. All of the other reports will show no results, as no data exists in the system meeting the selection criteria for the other reports. The main point of this exercise is to verify that you configured Excel Services and the Secure Store Service correctly for normal operations.

Congratulations, you now have a fully functioning SharePoint Server 2010 and Project Server 2010 installation. Next, you take on the more difficult and time-consuming task of configuring your Project Server for your organization's specific requirements. The modules that follow walk you through this process.

## Creating Additional Project Server Instances

Creating additional Project Server instances on your farm is quite simple once you have learned how to perform the post installation configuration steps that are the primary subject of this module. Before you create your new Project Server instance, you must consider whether your new instance targets the same audience as your first site, or whether it will serve a different user community. Review this entire topical section before creating an additional instance, to properly prepare yourself and your security environment based on its target audience.

To begin the process of creating an additional Project Server instance, open your SharePoint Central Administration site and click on the *Manage Service Applications* link in the *Application Management* section. The system displays the *Manage Service Applications* page. Select the *Project Server Service Application* link and the system displays the *Manage Project Web Access Sites* page shown in Figure 5 - 80.

The screenshot shows the SharePoint Central Administration interface. The left navigation bar includes links for Site Actions, Central Administration, Application Management, System Settings, Monitoring, Backup and Restore, Security, Upgrade and Migration, General Application Settings, Configuration Wizards, Recycle Bin, and All Site Content. The main content area is titled "Central Administration > Manage Project Web Access Sites". It displays a message: "This page allows you to manage all of your Project Web Access virtual directories within this farm." A status message at the top right says "Project server provisioning timer job status: Online. Last Run Time: 12/10/2009 10:50:44 AM". Below this are buttons for "Create Project Web Access Site" and "Refresh Status". A table lists existing sites: "SharePoint - 80" with URL "http://labp14beta/" and two provisioned sub-sites: "http://labp14beta/PWA" and "http://labp14beta/PWAMSPE". A "Close" button is at the bottom right of the table.

Figure 5 - 80: Manage Project Web Access Sites

Click the *Create Project Web Access Site* link, just as you did previously on this page to create your first PWA site in Module 4. The system displays the *Create Project Web Access Site* page shown in Figure 5 - 81.

The screenshot shows the 'Create Project Web Access Site' dialog box. The left sidebar lists 'Central Administration' and 'Application Management'. The main area has sections for 'Project Web Access Site Location', 'Administrator Account', 'Primary Database', 'Reporting Database', 'Site Quota', and 'Manage Project Web Access Site Settings'. The 'Project Web Access Site Location' section includes fields for 'SharePoint Web Application to host Project Web Access' (set to 'SharePoint - 80'), 'Project Web Access path' (set to 'PWA\$andbox'), 'Select a language' (set to 'en-US'), and a checked checkbox for 'Use Project Web Access path as host header'. The 'Administrator Account' section shows 'p14\_svc' entered in the field. The 'Primary Database' section shows database names starting with 'cfzsql01\labp14beta'. The 'Reporting Database' section shows 'Reporting database server' set to 'cfzsql01\labp14beta' and a checked checkbox for 'Use the primary database server'. The 'Site Quota' section shows quota settings for 'Quota for SharePoint content in this site' and 'Quota Warning for SharePoint content in this site'. The 'Manage Project Web Access Site Settings' section contains a link to 'Project Web Access Site Settings'. At the bottom right are 'OK' and 'Cancel' buttons.

Figure 5 - 81: Create Project Web Access Site page

Notice that I gave the site a new name in the *Project Web Access Path* field. Likewise, you must choose a unique value for this field and then change the database names from the default names to a unique and identifiable name for your system. In this case, I chose to prefix the database names with the instance name to create identifiable labels that display nicely in SQL Server Management Studio. Click the *OK* button to create your new site. The system returns to the *Manage Project Web Access Sites* page shown previously in Figure 5 - 80. Notice that a line item now shows for your new site and the *Status* field changes as the site provisioning walks through the following steps:

- Waiting for resources
- Creating Project Web Access Site
- Provisioning Databases
- Configuring the new Project Web Access Site
- Provisioned

## **Configuring Your New Project Server Instance**

Once the system completes the new site provisioning, you must repeat the post configuration steps you completed for your first PWA site, for your new site. To view the specific steps for each of the following, refer back to the detailed instructions earlier in this module.

- **Add login to Project Server Reporting Database for Domain Global Groups:** If you create new domain global groups for a Project Server instance, you must add a login for these groups in SQL Server repeating the steps you took for your first instance.
- **Add login to Project Server Reporting Database for Secure Store Account:** If your new site is intended for a separate audience, you will want to create a new Secure Store Target Application for the new instance. If your new Target Application will use unique credentials then you must also create a SQL Login for this account following the same steps you used to do this for the first instance.
- **Add a Trusted Data Connection Library to Excel Services:** You must now add the URL for your new site Trusted Data Connection library on the Excel Services *Trusted Data Connection Libraries* page. The easiest way to accomplish this is to open the existing record, copy the URL and paste it into the *Add Trusted Data Connection Library* page. Change the portion of the URL that represents the instance name to your new site before saving the record.
- **Add Trusted File locations to Excel Services:** As you did with your first site, you must add the two trusted data connection records to your Excel Services *Trusted File Locations* library. The easiest way to accomplish this is to harvest the URLs from your first two entries and duplicate the entries changing the portion of the URL that points to the specific instance.
- **Create a SQL Login for the OLAP Services account for the new instance reporting database:** Just as your first instance, the account running OLAP services requires access to the reporting database for the new instance in order to generate the OLAP cube.
- **Implement SQL Server performance settings:** Use the same rules you applied to your first instance to your new instance.

**Warning:** Creating a new instance of Project Server provisions all built-in trusted data connections, templates, and sample reports with the same Secure Store Service ID value "ProjectServerApplication" resulting in all new Project Server instances pointing to the first Secure Store Service Application you created above. In order to segregate Report Readers and Report Authors of various instances, each instance requires its own set of domain global groups and it requires its own Secure Store Target Application, otherwise users automatically gain access to the reporting databases of other instances.



- **Optionally Create new domain global groups for report authors and report viewers:** I call this an optional step as you must first determine whether you are accommodating a separate security audience in your new site. If your new site serves a distinctly different audience than your first site, you must create new domain global groups to segregate the reporting user authorities for your instances.
- **Optionally Create a new Secure Store Target Application for the instance:** When your new instance serves a separate audience than your first site, you should create a new Secure Store Target Application for your new site following the steps provided earlier in this module. You can use any Application ID you want, but you must alter the connection strings for your Data Connections Library and the documents in the Sample Reports and Templates libraries to point to this Application ID using the procedure that follows.

## Point Data Connections to the new Secure Store Target Application

When you elect to create a separate Secure Store Target Application with a distinct Secure Store Service ID value, you must update the existing SSS ID values for all of the Connection Workbooks, Templates and Sample Reports, which always point to the *Application ID* “ProjectServerApplication.” If you created a new Secure Store Target Application for your new Project Server instance, then you must next point your Project Server reporting artifacts at your new Target Application. Before executing the following steps, copy your new Target Application ID to your clipboard.

1. From the Project Web Access home page for your new instance, click on the BI Center link in the My Work section of the Quick Launch menu. Click the *Data Connections* link from the menu on the left and click the English (United States) link or the appropriate link for your system and locale. The system displays the *Data Connections* page shown in Figure 5 - 82.

Item Name	Description	Last Modified	Location	Properties
Project Server - Top Projects Data	Project Server data connection for Top Projects data reporting. This is generated automatically by Project Server, your changes will be lost whenever a refresh occurs.	12/5/2009 10:51 AM	SHAREPOINT\system	<a href="#">View Properties</a>
Project Server - Workflow Chart Data	Project Server data connection for Workflow Chart data. This is generated automatically by Project Server, your changes will be lost whenever a refresh occurs.	12/5/2009 10:51 AM	SHAREPOINT\system	<a href="#">View Properties</a>
Project Server - Workflow Drilldown Data	Project Server data connection for Workflow data reporting. This is generated automatically by Project Server, your changes will be lost whenever a refresh occurs.	12/5/2009 10:51 AM	SHAREPOINT\system	<a href="#">View Properties</a>

Figure 5 - 82: Data Connections page (partial)

2. From the *Data Connections* page, select the first data connection document link, or hover over the link and select *Edit in Microsoft Excel* from the menu. The system launches Excel. Enter your logon credentials if the system prompts. Click the *Enable* button if you see the warning shown in Figure 5 - 83.

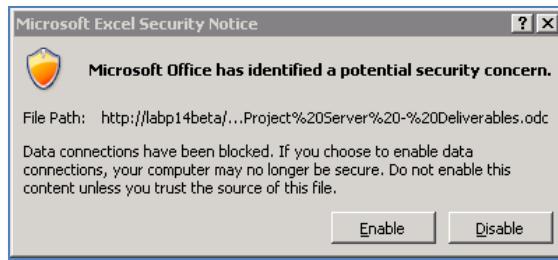


Figure 5 - 83: Security Notice

3. After you click the *Enable* button, the system displays the selected workbook in Excel as shown in Figure 5 - 84.

A screenshot of a Microsoft Excel window titled "Book1 [Read-Only] - Microsoft Excel". The ribbon shows "Table Tools" as the active tab. A warning bar at the top says "Server Read-Only This workbook was opened from a server in read-only mode." Below the ribbon is a table with columns labeled "Deliverable Title", "Deliverable Start Date", "Deliverable Finish Date", "Deliverable Description", "Provider Project Name", and "Provider Project Start Date". The table has 24 rows. The status bar at the bottom indicates "Project Server - Deliverables" and "English (United States) - Windows Internet Explorer".

Figure 5 - 84: ODC File Open in Excel

4. Note that the document may be open in Read-Only mode. To edit the document, click the *Edit Workbook* button in the warning band below the ribbon menu. The system displays the *Workbook Connections* dialog shown in Figure 5 - 85.



At this point you checkout the file so you can later overwrite it with a the new .odc file you are creating in this process.

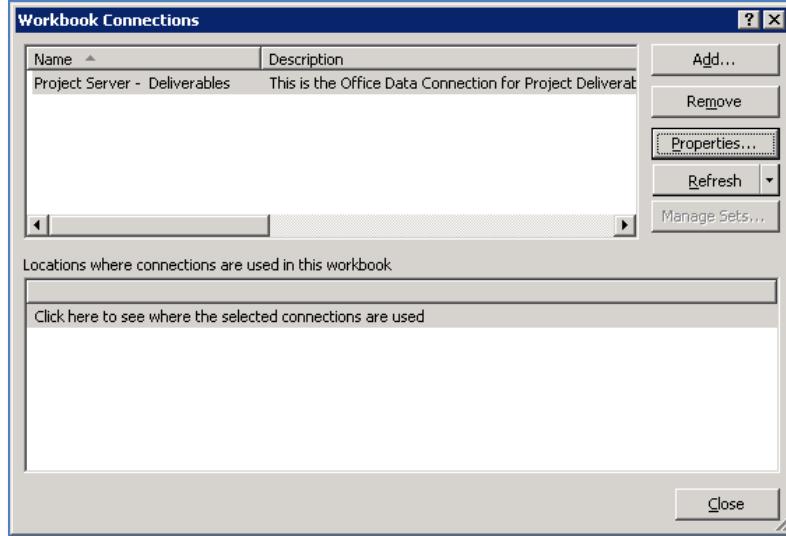
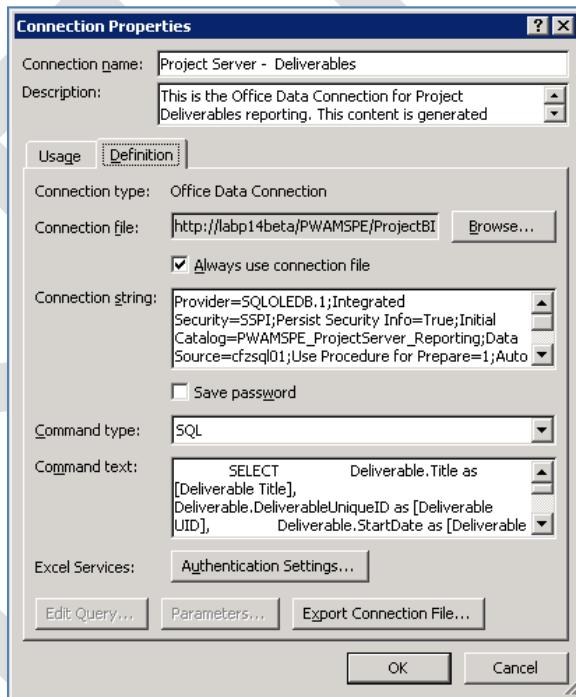


Figure 5 - 85: Workbook Connections dialog

5. In the *Workbook Connections* dialog, click the *Properties* button. The system displays the *Connection Properties* page. Select the *Definition* tab to display the connection details as shown in Figure 5 - 86.

Figure 5 - 86: Connection Properties  
Definition Tab

6. Click the *Authentication Settings* button in the *Excel Services* section of the page. The system displays the *Excel Services Authentication Settings* dialog shown in Figure 5 - 87.



Figure 5 - 87: Excel Services Authentication Settings dialog

7. In the *SSS ID* field, change the Application ID to the one that you assigned to your new Secure Store Target Application for your new instance. Click the *OK* button to return to the *Connection Properties* page shown previously in Figure 5 - 86. On the *Connection Properties* page, click the *Export Connection File* button. The system opens the *Excel File Save* dialog shown in Figure 5 - 88.

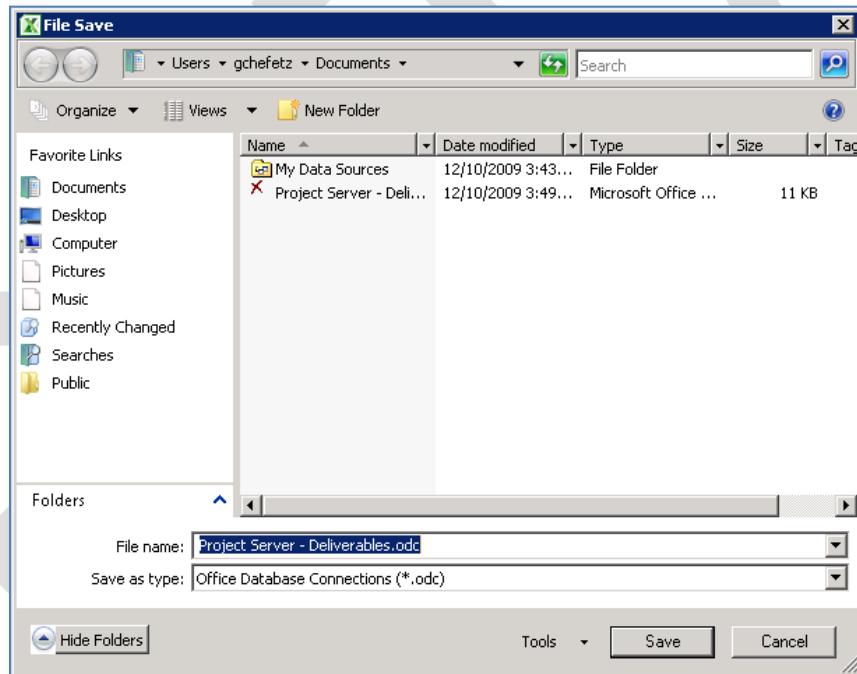


Figure 5 - 88: File Save dialog

8. Click the *Save* button to save the new .odc file to a directory on your local machine. Click the *OK* button to close the *Connection Properties* dialog and then click the *Close* button on the *Workbook Connections* dialog. Close the workbook and the system prompts you to save as shown in Figure 5 - 89 .

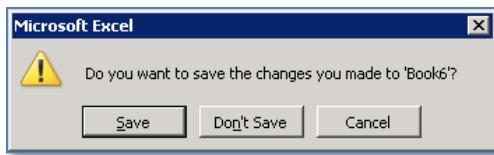


Figure 5 - 89: Save Warning

- Click the *Don't Save* button and the system prompts you to check-in the file as shown in Figure 5 - 90.

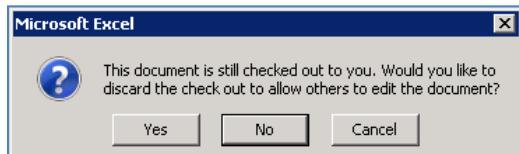


Figure 5 - 90: Prompt to Check-in

- Click the *No* button to leave the connection document checked out. Complete these steps for each of the connection documents in the *Data Connections Library* until you have created new .odc files containing the new Target Application pointer for each connection in the library. After you complete the new file set, use the *Upload Document* button on the *Document* tab of the ribbon in the *Connections Library* to upload your new versions of the connection files and check them in after uploading.

## ***Point Reports and Templates to the new Secure Store Target Application***

The process for pointing the Sample Reports and Templates to your new Secure Store Target Application is almost identical to the process you follow to re-point the data connection documents, but does not require the Export actions described in steps seven and eight above. Instead, after you check-out, and edit the connection authentication value, you can save the document directly back to the SharePoint document library making this process slightly less complex.

- From the Project Web Access home page for your new instance, click on the BI Center link in the My Work section of the Quick Launch menu. Click the *Sample Reports* link from the menu on the left and click the English (United States) link or the appropriate link for your system and locale. The system displays the *Sample Reports* page shown in Figure 5 - 91.

The screenshot shows a SharePoint library interface titled "Sample Reports". The left navigation pane includes links for Dashboards, Data Connections, Documents, Sample Reports (which is selected), Templates, PerformancePoint Content, Recycle Bin, and All Site Content. The main content area displays a table of reports with columns for Type, Name, Modified, and Modified By. The reports listed are Deliverables, IssuesAndRisks, MilestonesDueThisMonth, RejectedProjectsList, ResourceCapacity, SimpleProjectsList, TimesheetActuals, TopProjects, WorkflowChart, WorkflowDrillDown, and zzprojectlist. All reports were modified on 12/2/2009 at 10:04 AM and are owned by System Account.

Type	Name	Modified	Modified By
	Deliverables	12/2/2009 10:04 AM	System Account
	IssuesAndRisks	12/2/2009 10:04 AM	System Account
	MilestonesDueThisMonth	12/2/2009 10:04 AM	System Account
	RejectedProjectsList	12/2/2009 10:04 AM	System Account
	ResourceCapacity	12/2/2009 10:04 AM	System Account
	SimpleProjectsList	12/2/2009 10:04 AM	System Account
	TimesheetActuals	12/2/2009 10:04 AM	System Account
	TopProjects	12/2/2009 10:04 AM	System Account
	WorkflowChart	12/2/2009 10:04 AM	System Account
	WorkflowDrillDown	12/2/2009 10:04 AM	System Account
	zzprojectlist	12/2/2009 4:14 PM	System Account

Figure 5 - 91: Sample Reports page

2. Hover over the link to the first report, *Deliverables* and select Check Out from the drop down menu as shown in Figure 5 - 92. Click the OK button if prompted by the system.

This screenshot shows the same SharePoint library as Figure 5 - 91, but with the cursor hovering over the "Deliverables" report. A context menu has appeared, listing options: View Properties, Edit Properties, View in Browser, Edit in Microsoft Excel, Check Out (which is highlighted with a green box), Send To, Compliance Details, Manage Permissions, and Delete. The "Check Out" option is the target of the user's action.

Figure 5 - 92: Check Out Report

3. Once again, hover over the link to reveal the menu and select the *Edit in Microsoft Excel* link from the menu. The system opens the sample report Excel in Figure 5 - 93.

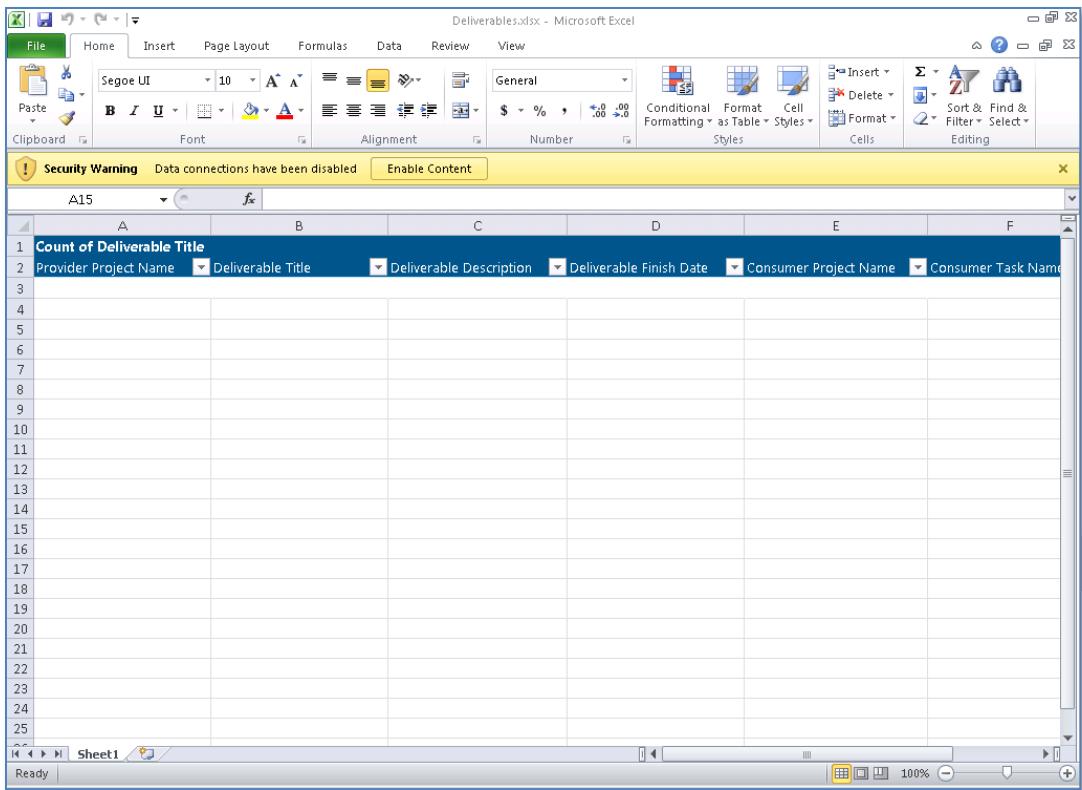


Figure 5 - 93: Sample Report Open in Excel Services

- Notice the *Security Warning* above the data grid. You do not have to refresh the data connection for this workbook at this time, as you are about to make a slight change to the connection properties. Click on the *Data* tab and then click on the *Connections* link from the *Connections* section of the Data ribbon. The system displays the *Workbook Connections* dialog shown in Figure 5 - 94. Note that this is the same dialog as shown in Figure 5 - 85 and that the next three steps are identical to changing the properties for the *Data Connection* documents, but repeated here for your convenience.

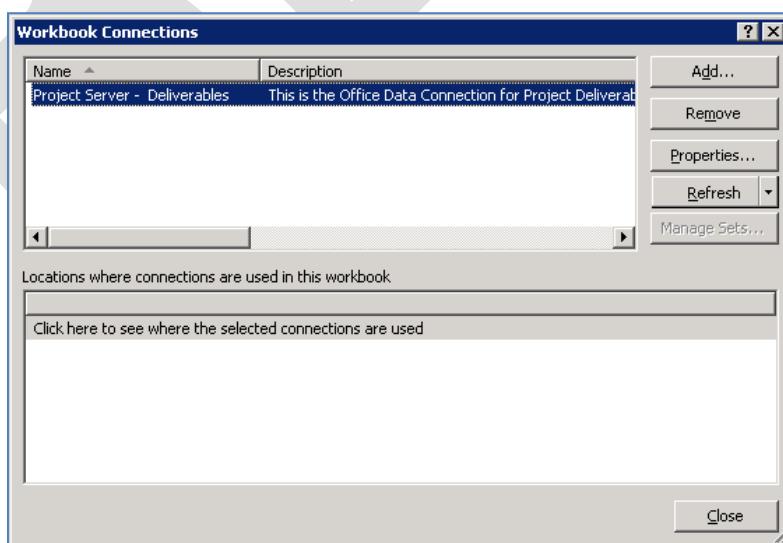


Figure 5 - 94: Workbook Connections dialog

- Click the *Properties* button and the system displays the Connection Properties page shown in . Select the *Definition* tab in the center of the page.

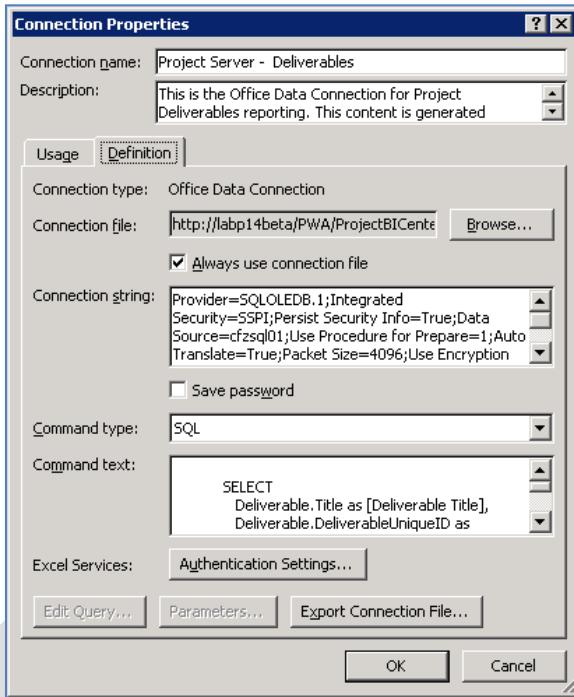


Figure 5 - 95: Connection Properties for Sample Report

- Click the *Authentication Settings* button in the *Excel Services* section of the page. The system displays the *Excel Services Authentication Settings* dialog shown in Figure 5 - 87.



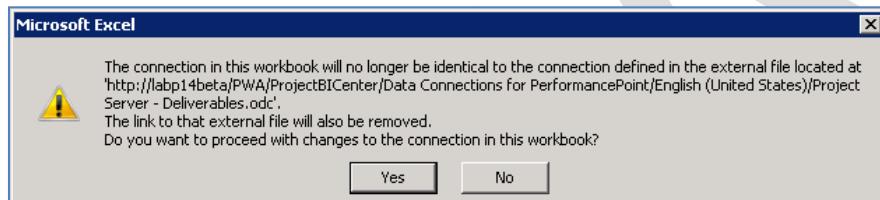
Figure 5 - 96: Excel Services Authentication Settings dialog

- In the *SSS ID* field, change the Application ID to the one that you assigned to your new Secure Store Target Application for your new instance. Click the *OK* button to return to the *Connection Properties* page shown previously in Figure 5 - 95. If the system displays the *Microsoft Excel Security Notice* warning shown in Figure 5 - 97, click the *OK* button to ignore the warning.



**Figure 5 - 97: Excel Security Notice**

8. The system then displays the Microsoft Excel notice shown in Figure 5 - 98, to warn you that you are changing the data connection. As you want to do this, click the *Yes* button to accept the change.



**Figure 5 - 98: Connection Change Warning**

9. The system returns you to the *Workbook Connections* dialog shown previously in Figure 5 - 94, click the *Close* button to close the page. In the Workbook, click *File > Save*, to save the workbook. Then use *File > Close* to close the workbook. Click the *Yes* button when the system prompts you to check-in the file and add version comments if you desire.

You must repeat this process for every Sample Report and Report Template in both the Sample Reports and Templates libraries. Once you have pointed your reporting artifacts to use your new Secure Store Target Application, you can segregate reporting authorities between instances.