Planning worksheets for Office Project Server 2007

**Updated: 2009-05-07**

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* [Planning worksheets by title](http://technet.microsoft.com/en-us/library/cc197549.aspx#section2)

This article provides links to worksheets that you can use to record information that you gather and decisions that you make as you plan your deployment of Microsoft Office SharePoint Server 2007. Use these worksheets in conjunction with — not as a substitute for — [Planning and architecture for Office Project Server 2007](http://technet.microsoft.com/en-us/library/cc197605.aspx).

**Planning worksheets by task**

|  |  |  |
| --- | --- | --- |
| **For this task** | **Use this worksheet** | **To do this** |
| [Chapter overview: Determine organization and user needs (Project Server)](http://technet.microsoft.com/en-us/library/cc197713.aspx) | [Planning team roles and responsibilities worksheet](http://go.microsoft.com/fwlink/?LinkID=73260&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73260&clcid=0x409) | List stakeholders, team members, and accountabilities. |
|  | [Project management requirements worksheet](http://go.microsoft.com/fwlink/?LinkID=73262&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73262&clcid=0x409) | Summarize requirements for managing a project. |
|  | [Projects and project characteristics worksheet](http://go.microsoft.com/fwlink/?LinkID=73261&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73261&clcid=0x409) | List projects by category, and record project characteristics. |
|  | [Users and user types worksheet](http://go.microsoft.com/fwlink/?LinkID=73259&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73259&clcid=0x409) | Record number of users, types of users, and user access requirements. |
| [Chapter overview: Plan EPM Solution architecture](http://technet.microsoft.com/en-us/library/cc197727.aspx) |  |  |
| [Chapter overview: Plan site structure and navigation (Project Server)](http://technet.microsoft.com/en-us/library/cc197502.aspx) | [Site hierarchy choices worksheet](http://go.microsoft.com/fwlink/?LinkId=73141&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkId=73141&clcid=0x409) | Record decisions about how to structure site navigation. |
|  | [Site hierarchy planning tool](http://go.microsoft.com/fwlink/?LinkId=73142&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkId=73142&clcid=0x409) | Create a site hierarchy diagram in Microsoft Office Visio. |
|  | [Site paths worksheet](http://go.microsoft.com/fwlink/?LinkId=73150&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkId=73150&clcid=0x409) | Record managed paths that need to be created for hosting collaboration sites. |
| [Chapter overview: Plan site and content security (Project Server)](http://technet.microsoft.com/en-us/library/cc197663.aspx) |  |  |
| [Chapter overview: Plan project life cycle](http://technet.microsoft.com/en-us/library/cc197760.aspx) |  |  |
| [Chapter overview: Plan Office Project Server 2007 configuration](http://technet.microsoft.com/en-us/library/cc197646.aspx) | [Plan for in-hosting worksheet](http://go.microsoft.com/fwlink/?LinkID=73275&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73275&clcid=0x409) | Plan an in-hosting scenario. |
|  | [Plan for out-hosting worksheet](http://go.microsoft.com/fwlink/?LinkID=73277&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73277&clcid=0x409) | Plan an out-hosting scenario. |
|  | [Portfolio management worksheet](http://go.microsoft.com/fwlink/?LinkID=73279&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73279&clcid=0x409) | Plan a portfolio management scenario. |
|  | [Program deployment worksheet](http://go.microsoft.com/fwlink/?LinkID=73281&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73281&clcid=0x409) | Plan a program deployment scenario. |
|  | [Timesheet scenario worksheet](http://go.microsoft.com/fwlink/?LinkID=73280&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73280&clcid=0x409) | Plan a timesheet scenario. |

**Planning worksheets by title**

|  |  |  |
| --- | --- | --- |
| **Use this worksheet** | **For this task** | **To do this** |
| [Plan for in-hosting worksheet](http://go.microsoft.com/fwlink/?LinkID=73275&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73275&clcid=0x409) | [Chapter overview: Plan Office Project Server 2007 configuration](http://technet.microsoft.com/en-us/library/cc197646.aspx) | Plan an in-hosting scenario. |
| [Plan for out-hosting worksheet](http://go.microsoft.com/fwlink/?LinkID=73277&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73277&clcid=0x409) | [Chapter overview: Plan Office Project Server 2007 configuration](http://technet.microsoft.com/en-us/library/cc197646.aspx) | Plan an out-hosting scenario. |
| [Planning team roles and responsibilities worksheet](http://go.microsoft.com/fwlink/?LinkID=73260&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73260&clcid=0x409) | [Chapter overview: Determine organization and user needs (Project Server)](http://technet.microsoft.com/en-us/library/cc197713.aspx) | List stakeholders, team members, and accountabilities. |
| [Portfolio management worksheet](http://go.microsoft.com/fwlink/?LinkID=73279&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73279&clcid=0x409) | [Chapter overview: Plan Office Project Server 2007 configuration](http://technet.microsoft.com/en-us/library/cc197646.aspx) | Plan a portfolio management scenario. |
| [Program deployment worksheet](http://go.microsoft.com/fwlink/?LinkID=73281&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73281&clcid=0x409) | [Chapter overview: Plan Office Project Server 2007 configuration](http://technet.microsoft.com/en-us/library/cc197646.aspx) | Plan a program deployment scenario. |
| [Project management requirements worksheet](http://go.microsoft.com/fwlink/?LinkID=73262&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73262&clcid=0x409) | [Chapter overview: Determine organization and user needs (Project Server)](http://technet.microsoft.com/en-us/library/cc197713.aspx) | Summarize requirements for managing a project. |
| [Projects and project characteristics worksheet](http://go.microsoft.com/fwlink/?LinkID=73261&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73261&clcid=0x409) | [Chapter overview: Determine organization and user needs (Project Server)](http://technet.microsoft.com/en-us/library/cc197713.aspx) | List projects by category, and record project characteristics. |
| [Site hierarchy choices worksheet](http://go.microsoft.com/fwlink/?LinkId=73141&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkId=73141&clcid=0x409) | [Chapter overview: Plan site structure and navigation (Project Server)](http://technet.microsoft.com/en-us/library/cc197502.aspx) | Record decisions about how to structure site navigation. |
| [Site hierarchy planning tool](http://go.microsoft.com/fwlink/?LinkId=73142&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkId=73142&clcid=0x409) | [Chapter overview: Plan site structure and navigation (Project Server)](http://technet.microsoft.com/en-us/library/cc197502.aspx) | Create a site hierarchy diagram in Microsoft Office Visio. |
| [Site paths worksheet](http://go.microsoft.com/fwlink/?LinkId=73150&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkId=73150&clcid=0x409) | [Chapter overview: Plan site structure and navigation (Project Server)](http://technet.microsoft.com/en-us/library/cc197502.aspx) | Record managed paths that need to be created for hosting collaboration sites. |
| [Timesheet scenario worksheet](http://go.microsoft.com/fwlink/?LinkID=73280&clcid=0x409) (http://go.microsoft.com/fwlink/?LinkID=73280&clcid=0x409) | [Chapter overview: Plan Office Project Server 2007 configuration](http://technet.microsoft.com/en-us/library/cc197646.aspx) | Plan a timesheet scenario. |
| [Users and user types worksheet](http://go.microsoft.com/fwlink/?LinkID=73259&clcid=0x409)  (http://go.microsoft.com/fwlink/?LinkID=73259&clcid=0x409) | [Chapter overview: Determine organization and user needs (Project Server)](http://technet.microsoft.com/en-us/library/cc197713.aspx) | Record number of users, types of users, and user access requirements. |

**Download this book**

This topic is included in the following downloadable book for easier reading and printing:

* [Planning and architecture for Office Project Server 2007](http://go.microsoft.com/fwlink/?LinkId=79598)