

# **Managing Enterprise Projects**

Using Microsoft Office Project Server 2003

2<sup>nd</sup> Edition

Gary L. Chefetz

Dale A. Howard

# Managing Enterprise Projects

## Using Microsoft Office Project Server 2003, 2<sup>nd</sup> Edition

Copyright © 2006 Soho Corp. dba MSProjectExperts

Publisher: Soho Corp.  
Authors: Gary L. Chefetz, Dale A. Howard  
Cover Design: Tony Valenzuela  
Cover Photo: Peter Hurley

ISBN 0-9759828-9-3

Library of Congress Control Number: 2006921169

All rights reserved. You may not reproduce or transmit any part of this work in any form or by any means, electronic or mechanical, including photocopying, recording, or by any information storage or retrieval system, without the prior written consent of the copyright owner and the publisher.

We use trademarked names in this book in an editorial context and to the benefit of the trademark owner with no intention of infringement of the trademark.

Published and distributed by Soho Corp, 90 John Street, Suite 404, New York, NY 10038  
(646) 736-1688 <http://www.msprojectexperts.com>

We provide the information contained in this book on an “as is” basis, without warranty. Although we make every effort to ensure the accuracy of information provided herein, neither the authors nor the publisher shall have any liability to any person or entity with respect to any loss or damage caused or allegedly caused directly or indirectly by the information contained in this work.

### EPM Learning™

EPM Learning is a complete series of role-based training manuals for professional trainers and corporate training programs. To learn more about the EPM Learning courseware series for Technical Administrators, PMO Administrators, Project Managers, Resource Managers, Executives and Team Members, or to obtain instructor companion products and materials, contact Soho Corp. by phone (646) 736-1688 or by email [info@msprojectexperts.com](mailto:info@msprojectexperts.com).

# Contents

<b>About the Authors .....</b>	<b>x</b>
<b>Introduction .....</b>	<b>xi</b>
<b>Module 01: Introducing Microsoft Project Server .....</b>	<b>1</b>
<b>What Is Microsoft Project Server? .....</b>	<b>3</b>
<i>Applying Enterprise Project Management Terminology to Microsoft Project Server .....</i>	<i>3</i>
<b>Understanding Project Server’s Language .....</b>	<b>4</b>
<i>Enterprise Project.....</i>	<i>4</i>
<i>Enterprise Resource.....</i>	<i>4</i>
<i>Check In and Check Out.....</i>	<i>4</i>
<b>Using Project Server’s Enterprise Resource Management Tools ....</b>	<b>5</b>
<b>Understanding the Project Communications Life Cycle in Project Server .....</b>	<b>6</b>
<i>Additional Collaboration and Management Tools .....</i>	<i>9</i>
<b>Understanding the Windows SharePoint Services Role with Project Server .....</b>	<b>10</b>
<b>Understanding Publishing in Project Server .....</b>	<b>11</b>
<b>Understanding Analysis Tools .....</b>	<b>12</b>
<i>Portfolio Modeling.....</i>	<i>13</i>
<b>Understanding Enterprise Global Concepts .....</b>	<b>14</b>
<i>Opening the Enterprise Resource Pool.....</i>	<i>14</i>
<b>Understanding Custom Outline Codes and Custom Fields .....</b>	<b>16</b>
<i>Why Enterprise Fields and Outline Codes Are Important to You .....</i>	<i>17</i>
<i>Enterprise Field and Outline Code Types.....</i>	<i>18</i>
<b>Understanding Tracking Method Settings.....</b>	<b>19</b>
<i>Default Method for Reporting Progress .....</i>	<i>20</i>
<i>Lock Down Defaults .....</i>	<i>22</i>
<i>Managed vs. Non-Managed Time Periods.....</i>	<i>23</i>
<i>Define Current Tasks .....</i>	<i>28</i>

<b>Module 02: Creating Enterprise Projects .....</b>	<b>31</b>
<b>Logging Into Project Server through Microsoft Project Professional 2003.....</b>	<b>33</b>
<b>Creating an Enterprise Project .....</b>	<b>38</b>
<b>Opening and Closing Project Plans.....</b>	<b>42</b>
<b>Working with Offline Projects .....</b>	<b>47</b>
<b>Importing Projects.....</b>	<b>51</b>
<b>Module 03: Building Project Teams, Assigning Resources and Leveling Assignments .....</b>	<b>59</b>
<b>Building a Project Team .....</b>	<b>61</b>
<i>Using Filters in the Build Team Dialog .....</i>	<i>63</i>
<i>Using Grouping .....</i>	<i>67</i>
<i>Viewing Resource Information.....</i>	<i>68</i>
<i>Adding Resources to Your Team .....</i>	<i>72</i>
<i>Using Proposed vs. Committed Booking.....</i>	<i>74</i>
<i>Using Local Resources in an Enterprise Project.....</i>	<i>76</i>
<b>Assigning Resources .....</b>	<b>80</b>
<i>Assign Resources Dialog.....</i>	<i>80</i>
<i>Task Entry View .....</i>	<i>82</i>
<b>Using the Resource Substitution Wizard .....</b>	<b>85</b>
<i>Running the Wizard .....</i>	<i>86</i>
<b>Leveling Overallocated Resources.....</b>	<b>97</b>
<i>Overallocation Defined .....</i>	<i>97</i>
<i>Resource Leveling Defined.....</i>	<i>97</i>
<i>Basic Leveling Techniques .....</i>	<i>97</i>
<i>Assigning Leveling Priorities to Tasks .....</i>	<i>101</i>
<b>Module 04: Publishing and Republishing Work Assignments</b>	<b>105</b>
<b>Understanding Project Server Publishing.....</b>	<b>107</b>
<i>Controlling Default Publishing Behavior .....</i>	<i>108</i>
<i>Publishing: Best Practices.....</i>	<i>110</i>
<b>Publishing Project and Assignment Information .....</b>	<b>111</b>
<i>Publishing All Information.....</i>	<i>111</i>
<i>Publishing New and Changed Assignments.....</i>	<i>112</i>
<i>Publishing the Project Plan.....</i>	<i>113</i>

<b>Republishing Assignments .....</b>	<b>116</b>
<i>Republishing to Take Over as the Manager of a Project .....</i>	<i>117</i>
<i>Republishing After Entering Actuals Manually in the Microsoft Project Plan .....</i>	<i>118</i>
<i>Republishing to Push a New Method of Tracking Progress to Each Team Member's Timesheet .....</i>	<i>118</i>
<i>Republishing to Unhide a Hidden Task on a Team Member's Timesheet .....</i>	<i>119</i>
<b>Understanding the Project Server Spooler .....</b>	<b>121</b>
<b>Requesting Task Progress Outside the Normal Flow .....</b>	<b>124</b>
<b>Determining Timesheet (Published) Fields .....</b>	<b>127</b>
<b>Module 05: Project Web Access Overview .....</b>	<b>131</b>
<b>Using the Project Web Access User Interface .....</b>	<b>133</b>
<i>Menu Bar .....</i>	<i>134</i>
<i>Actions Pane .....</i>	<i>135</i>
<i>Customization Tabs .....</i>	<i>138</i>
<i>Action Bar .....</i>	<i>140</i>
<b>Manipulating the Data Grid .....</b>	<b>142</b>
<b>Printing the Data Grid .....</b>	<b>146</b>
<i>Exporting the Data Grid to Excel.....</i>	<i>149</i>
<b>Module 06: Tracking Progress through Project Web Access .</b>	<b>153</b>
<b>Working with Tasks in Project Web Access .....</b>	<b>155</b>
<b>Understanding the Timesheet .....</b>	<b>157</b>
<i>Timesheet indicators.....</i>	<i>157</i>
<i>Understanding the Timesheet Toolbar .....</i>	<i>159</i>
<i>Activities Available from the Actions Pane.....</i>	<i>159</i>
<i>View Options .....</i>	<i>160</i>
<i>Filtering, Grouping and Searching the Timesheet View .....</i>	<i>163</i>
<i>Displaying the Gantt Chart View.....</i>	<i>166</i>
<i>Current Tasks vs. All Tasks.....</i>	<i>166</i>
<b>Reporting Progress in the Timesheet.....</b>	<b>167</b>
<i>Setting Up the Timesheet to Enter Actuals.....</i>	<i>167</i>
<i>Entering and Submitting Progress.....</i>	<i>168</i>

<b>Using Other Task Activities .....</b>	<b>173</b>
<i>Rejecting a Task.....</i>	<i>173</i>
<i>Delegating a Task.....</i>	<i>175</i>
<i>Creating a New Task.....</i>	<i>179</i>
<i>Assigning Yourself to an Existing Task.....</i>	<i>182</i>
<i>Hiding Tasks .....</i>	<i>184</i>
<i>Inserting Task Notes.....</i>	<i>186</i>
<i>Linking Documents to Tasks .....</i>	<i>188</i>
<i>Linking Issues to Tasks .....</i>	<i>189</i>
<i>Linking Risks to Tasks.....</i>	<i>190</i>
<b>Managing Project Tasks in Outlook .....</b>	<b>191</b>
<b>Notifying Managers of Working Day Changes.....</b>	<b>191</b>
<b>Module 07: Working with Outlook .....</b>	<b>193</b>
<b>Managing Project Tasks in Outlook .....</b>	<b>195</b>
<i>Automatically Import Project Tasks into Outlook.....</i>	<i>203</i>
<b>Displaying Project Web Access in Outlook .....</b>	<b>204</b>
<b>Module 08: Updating Progress through Project Web Access. 209</b>	
<b>Applying Updates in Project Web Access .....</b>	<b>211</b>
<i>Setting View Options.....</i>	<i>212</i>
<i>Setting Filter, Group, Search Options .....</i>	<i>213</i>
<b>Accepting and Rejecting Updates.....</b>	<b>215</b>
<i>Rescheduling Uncompleted Work.....</i>	<i>218</i>
<b>View History of Past Task Changes .....</b>	<b>221</b>
<b>Setting Rules for Accepting Task Updates .....</b>	<b>223</b>
<b>Timesheet Approval .....</b>	<b>229</b>
<i>Viewing Unsubmitted Timesheets .....</i>	<i>233</i>
<b>Axioms for Success with Tracking.....</b>	<b>237</b>
<b>Module 09: Using the Home Page .....</b>	<b>239</b>
<b>Using Features from the Home Page .....</b>	<b>241</b>
<i>Changing Your Password .....</i>	<i>242</i>
<i>Setting Alerts and Reminders for Yourself.....</i>	<i>243</i>
<i>Setting Reminders for your Resources.....</i>	<i>245</i>
<i>Taking Project Web Access Offline .....</i>	<i>248</i>

<b>Module 10: Working with Risks, Issues, and Documents .....</b>	<b>255</b>
<b>Working with Risks, Issues, and Documents.....</b>	<b>257</b>
<b>Working with Risks .....</b>	<b>257</b>
<i>Viewing Risks.....</i>	<i>258</i>
<i>Creating and Editing Risks .....</i>	<i>263</i>
<i>Attaching Risks to Tasks, Issues, Documents, and Other Risks .....</i>	<i>265</i>
<b>Working with Issues .....</b>	<b>268</b>
<i>Viewing Issues .....</i>	<i>268</i>
<i>Creating and Editing Issues .....</i>	<i>270</i>
<i>Attaching Issues to Other Issues, Tasks, Risks, and Documents .....</i>	<i>272</i>
<b>Working with Document Libraries.....</b>	<b>274</b>
<i>Viewing Document Libraries.....</i>	<i>274</i>
<i>Creating a New Document Library .....</i>	<i>276</i>
<i>Using a Document Library .....</i>	<i>278</i>
<i>Uploading Documents to a Library .....</i>	<i>279</i>
<i>Creating a New Document in a Library .....</i>	<i>281</i>
<i>Creating a New Folder in a Library.....</i>	<i>283</i>
<b>Working with Existing Documents in a Library.....</b>	<b>284</b>
<i>Viewing Document Properties.....</i>	<i>285</i>
<i>Editing Document Properties.....</i>	<i>285</i>
<i>Editing in a Microsoft Office Application .....</i>	<i>286</i>
<i>Deleting a Document .....</i>	<i>287</i>
<i>Checking Out/Checking In a Document .....</i>	<i>287</i>
<i>Working with the Versions History .....</i>	<i>289</i>
<i>Discussing a Document .....</i>	<i>291</i>
<b>Using the Project Workspace .....</b>	<b>293</b>
<i>Discussing a Document .....</i>	<i>294</i>
<b>Module 11: Working with Advanced Features of Risks, Issues, and Documents .....</b>	<b>303</b>
<b>Using Actions Pane Features.....</b>	<b>305</b>
<b>Viewing Reports.....</b>	<b>306</b>
<b>Setting Alerts.....</b>	<b>309</b>
<b>Exporting to an Excel spreadsheet.....</b>	<b>310</b>

<b>Modifying Settings and Columns .....</b>	<b>313</b>
<i>Modifying General Settings for Risks and Issues .....</i>	<i>315</i>
<i>Modifying General Settings for Documents.....</i>	<i>317</i>
<i>Modifying Columns Settings .....</i>	<i>320</i>
<i>Modifying Views .....</i>	<i>324</i>
<b>Synchronizing with Project Server .....</b>	<b>332</b>
<b>Module 12: Working with Status Reports .....</b>	<b>335</b>
<b>Requesting a Status Report .....</b>	<b>337</b>
<i>Creating a New Status Report Request.....</i>	<i>338</i>
<i>Editing and Deleting Status Reports.....</i>	<i>344</i>
<b>Responding to a Status Report Request .....</b>	<b>345</b>
<i>Submitting an Unrequested Status Report .....</i>	<i>349</i>
<i>Viewing the Status Reports Archive .....</i>	<i>350</i>
<b>Viewing Status Report Responses.....</b>	<b>353</b>
<i>Viewing Unrequested Status Reports.....</i>	<i>357</i>
<b>Module 13: Working in the Resource Center.....</b>	<b>361</b>
<b>Using the Resource Center .....</b>	<b>363</b>
<i>Viewing Resource Availability .....</i>	<i>364</i>
<i>Editing Resource Details.....</i>	<i>370</i>
<i>Opening a Resource for Editing .....</i>	<i>372</i>
<b>Viewing Resource Assignments .....</b>	<b>373</b>
<i>Saving a Link to a Resource Assignment View .....</i>	<i>377</i>
<b>Adjusting Actuals for Resources .....</b>	<b>380</b>
<b>Viewing the Timesheet Summary.....</b>	<b>382</b>
<b>Module 14: Working in the Project Center .....</b>	<b>385</b>
<b>Working in the Project Center.....</b>	<b>387</b>
<i>Accessing Risks, Issues, and Documents from the Project Center ...</i>	<i>388</i>
<i>Using Project Center Views .....</i>	<i>389</i>
<i>Building a Project Team.....</i>	<i>397</i>
<i>Editing Project Details and Opening Projects .....</i>	<i>401</i>
<i>Checking In Projects.....</i>	<i>404</i>
<b>Working with Detailed Project Views .....</b>	<b>405</b>
<b>Organizing Your Saved Links .....</b>	<b>408</b>
<b>Working with To-Do Lists.....</b>	<b>409</b>

<b>Module 15: Working with Project Server Analysis .....</b>	<b>415</b>
<b>The Need for Project Analysis .....</b>	<b>417</b>
<b>Using Portfolio Analyzer Views .....</b>	<b>417</b>
<i>Creating Custom Portfolio Analyzer Views.....</i>	<i>425</i>
<i>Additional Portfolio Analyzer Options.....</i>	<i>431</i>
<i>Tips for Using the Portfolio Analyzer.....</i>	<i>434</i>
<b>Using the Portfolio Modeler.....</b>	<b>439</b>
<i>Creating a New Model .....</i>	<i>440</i>
<i>Opening a Model .....</i>	<i>444</i>
<i>Modifying your Model.....</i>	<i>446</i>
<i>Analyze Your Model .....</i>	<i>449</i>
<i>Comparing Models.....</i>	<i>451</i>
<b>Index.....</b>	<b>455</b>

# About the Authors

**Gary Chefetz** is the founder and President of Soho Corp. and MSProjectExperts, which exist to support businesses and organizations that choose the Microsoft enterprise project management platform. Gary has worked with Microsoft Project since 1995 and has supported Microsoft Project users since the introduction of Project Central in early 2000. Gary continues to receive the prestigious Microsoft Project Most Valuable Professional (MVP) award for his contributions. As a long-time MVP, he works closely with the Microsoft Project product team and support organizations. Gary is dedicated to supporting Microsoft Project Server implementations through his business efforts with clients and through his contributions in the newsgroups. Contact Gary Chefetz online in one of the Microsoft Project newsgroups at [msnews.microsoft.com](http://msnews.microsoft.com) or e-mail him at:

[gary\\_chefetz@msprojectexperts.com](mailto:gary_chefetz@msprojectexperts.com)

**Dale Howard** is an enterprise project management trainer/consultant and is Vice President of Educational Services of MSProjectExperts. Dale is a Certified Technical Trainer (CTT) who has more than 13 years of experience training and consulting in productivity software. He has worked with Microsoft Project since 1997 and volunteers many hours each week answering user questions in the various Microsoft Project communities. Dale received the prestigious Microsoft Project Most Valuable Professional (MVP) award in 2004 for his expertise with the software and for his contributions to the user communities. Dale is married to Mickey and lives in Denver, Colorado. Contact Dale online in one of the Microsoft Project newsgroups at [msnews.microsoft.com](http://msnews.microsoft.com) or e-mail him at:

[dale\\_howard@msprojectexperts.com](mailto:dale_howard@msprojectexperts.com)

# Introduction

Thank you for reading *Managing Enterprise Projects Using Microsoft Office Project Server 2003*. Herein find a complete learning guide and reference to managing projects using the Microsoft EPM platform. Our goal in writing this training/reference manual is to help you build on your knowledge of the stand-alone tool and bring you up to speed on the new enterprise features and concepts you will need to manage projects using the Microsoft EPM tool set.

We take a systematic approach to the topical ordering in this book beginning with an overview of Project Server. The next three modules teach you how to use Microsoft Project Professional to create an enterprise project, build an enterprise project team, and publish the project. We then dive into the project updating cycle where you learn how team members update progress in Project Web Access and in Outlook, and how you accept and update their progress into the project plan. The four modules that follow demonstrate how to set up important options in the Home page, along with how to use Risks, Issues, Documents, and Status Reports in Project Web Access. The final four modules teach you how to view information about your enterprise projects and resources across your organization's project portfolio.

Throughout each module, you get a generous amount of Notes, Warnings, and Best Practices. Notes call your attention to important additional information about a subject. Warnings help you to avoid the most common problems experienced by others and Best Practices provide tips for using the tool based on our field experience.

Because you have read this manual, we believe that you will be much more effective using Microsoft Enterprise Project Management tools. If you have questions about the book or are interested in our professional services, please contact us at our office. If you have questions about Microsoft Project or Project Server, contact us through the Microsoft public news groups.

Gary L. Chefetz, Microsoft Project MVP

Dale A. Howard, Microsoft Project MVP

MSProjectExperts

