

Managing Enterprise Projects

Using Microsoft Office Project Server 2007

Second Edition

Gary L. Chefetz
Dale A. Howard

Managing Enterprise Projects

Using Microsoft Office Project Server 2007 Second Edition

Copyright © 2009 Chefetz LLC dba MSProjectExperts

Publisher: Chefetz LLC.
Authors: Gary L. Chefetz, Dale A. Howard
Special Contributor: Tony Zink
Copy Editor: Rodney L. Walker
Cover Design: Tony Valenzuela
Cover Photo: Peter Hurley

ISBN 978-1-934240-06-9

LCCN 2008934501

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 Chefetz LLC. dba MSProjectExperts, 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 Chefetz LLC. by phone (646) 736-1688 or by email info@msprojectexperts.com.

Contents

About the Authors	xi
Download the Sample Files	xi
Introduction.....	xii
Module 01: Introducing Microsoft Project Server	1
What Is Microsoft Office Project Server?.....	3
Understanding Project Management Theory.....	3
<i>Understanding Enterprise Project Management Terminology</i>	<i>3</i>
Understanding Project Server Terminology	4
<i>Enterprise Project.....</i>	<i>4</i>
<i>Enterprise Resource.....</i>	<i>4</i>
<i>Check In and Check Out.....</i>	<i>5</i>
Using Enterprise Resource Management Tools	5
Understanding the Communications Life Cycle.....	6
<i>Additional Collaboration and Management Tools.....</i>	<i>11</i>
Understanding Windows SharePoint Services	12
Understanding Project Server Databases	13
Understanding Project Server Data Analysis	13
Understanding Enterprise Global Concepts	15
<i>Opening the Enterprise Resource Pool.....</i>	<i>16</i>
Understanding Custom Fields.....	18
Understanding Tracking Methods	19
<i>Defining a Current Task</i>	<i>24</i>
Module 02: Preparing to Use Project Server	25
Using the Project Web Access User Interface.....	27
<i>Logging into Project Web Access from another Workstation</i>	<i>28</i>
<i>Using the Quick Launch Menu</i>	<i>29</i>
<i>Using Context-Sensitive Menus</i>	<i>30</i>
<i>Using the Action Bar.....</i>	<i>34</i>
<i>Manipulating the Data Grid.....</i>	<i>35</i>
<i>Printing the Data Grid</i>	<i>37</i>
<i>Exporting the Data Grid to Excel</i>	<i>41</i>
Creating a Login Account in Project Professional 2007	42
Module 03: Working with Proposals and Activity Plans	49
Understanding Proposals and Activity Plans	51
<i>Limitations of Proposals and Activity Plans.....</i>	<i>51</i>
Creating a Proposal.....	52
<i>Creating a Proposal from a SharePoint List</i>	<i>60</i>
<i>Editing an Existing Proposal.....</i>	<i>65</i>

Creating an Activity Plan	67
<i>Creating an Activity plan from a SharePoint List</i>	<i>70</i>
Creating a Resource Plan	72
<i>Building a Team on a Resource Plan</i>	<i>73</i>
<i>Reserving Resource Availability in a Resource Plan</i>	<i>79</i>
Building a Team on a Proposal or Activity plan	86
<i>Importing Resources from a Resource Plan</i>	<i>86</i>
<i>Manually Adding Resources to the Team</i>	<i>87</i>
<i>Assigning Resources to Tasks</i>	<i>91</i>
Publishing a Proposal or Activity plan	94
<i>Linking Documents to a Proposal or Activity plan.....</i>	<i>96</i>
Module 04: Creating Enterprise Projects	101
Converting a Proposal to an Enterprise Project	103
<i>Converting the Resource Plan for a Proposal</i>	<i>105</i>
Creating an Enterprise Project Using Project Professional 2007	107
Defining an Enterprise Project	110
<i>Set the Project Start Date and Enterprise Field Values</i>	<i>110</i>
<i>Enter the Project Properties.....</i>	<i>111</i>
<i>Display the Project Summary Task</i>	<i>114</i>
<i>Set the Project Working Schedule.....</i>	<i>115</i>
<i>Set Options Unique to the Project.....</i>	<i>118</i>
<i>Save the Project</i>	<i>122</i>
Understanding the Local Cache	124
<i>Adjusting Local Cache Settings</i>	<i>125</i>
<i>Viewing Local Cache Contents.....</i>	<i>126</i>
<i>Cleaning Up the Local Cache.....</i>	<i>127</i>
<i>Resolving Local Cache Corruption.....</i>	<i>129</i>
Opening and Closing Projects.....	131
Working with Offline Projects	139
Importing Projects	144
Module 05: Task Planning Basic Skills	155
Using a Task Planning Process	157
Understanding Change Highlighting	158
Skills Review - Basic Task Planning.....	159
<i>Entering and Editing Tasks</i>	<i>159</i>
<i>Moving Tasks.....</i>	<i>160</i>
<i>Inserting Tasks</i>	<i>161</i>
<i>Deleting Tasks</i>	<i>162</i>
<i>Creating the Work Breakdown Structure (WBS)</i>	<i>164</i>
<i>Creating Milestones</i>	<i>166</i>
<i>Adding Task Notes and Cell Background Formatting.....</i>	<i>169</i>
Skills Review - Using Task Dependencies	174
<i>Understanding Task Dependencies</i>	<i>174</i>

<i>Setting Task Dependencies</i>	175
<i>Removing a Task Dependency</i>	176
<i>Using Lag Time with Dependencies</i>	176
<i>Using Lead Time with Dependencies</i>	178
Skills Review - Setting Task Constraints and Deadline Dates	181
<i>Setting Constraints</i>	181
<i>Adding Notes on Tasks with Constraints</i>	183
<i>Setting Deadline Dates</i>	184
Skills Review - Assigning Task Calendars	188
Skills Review - Estimating Task Durations	190
Module 06: Resource and Assignment Planning	193
Understanding Enterprise Resources	195
Building a Project Team	196
<i>Filtering Resources in the Build Team Dialog</i>	199
<i>Grouping Resources in the Build Team Dialog</i>	207
<i>Viewing Resource Information in the Build Team Dialog</i>	208
<i>Adding Resources to Your Project Team</i>	213
<i>Matching and Replacing Resources in the Build Team Dialog</i>	214
<i>Using Proposed vs. Committed Booking</i>	215
<i>Using Local Resources in a Project Team</i>	217
Skills Review – Assigning Resources Using the Task Entry View	221
<i>Understanding the Duration Equation</i>	224
<i>Understanding Task Types</i>	226
<i>Understanding Effort Driven Scheduling</i>	228
Skills Review – Assigning Resources Using Assign Resources Dialog ..	231
Assigning Cost Resources	236
<i>Assigning a Budget Cost Resource</i>	236
<i>Assigning an Expense Cost Resource</i>	240
<i>Recommendations for Using Cost Resources</i>	241
Using the Resource Substitution Wizard	243
<i>Preparing a Project for the Resource Substitution Wizard</i>	244
<i>Running the Resource Substitution Wizard</i>	245
Skills Review - Leveling Overallocated Resources	258
<i>Using a Leveling Methodology</i>	259
<i>Leveling an Overallocated Resource</i>	259
<i>Viewing Leveling Results</i>	261
<i>Clearing Leveling Results</i>	263
<i>Setting Task Priority Numbers</i>	264
<i>Avoid Creating Resource Overallocations When Assigning Resources</i>	266
Module 07: Project Execution	269
Analyzing the Critical Path	271
Understanding Task Drivers	277
Working with Project Baselines	281
<i>Saving a Project Baseline</i>	282

<i>Saving Over a Previous Baseline</i>	283
<i>Clearing the Project Baseline</i>	284
Understanding Publishing	286
<i>Setting Publishing Options</i>	287
<i>Publishing an Enterprise Project</i>	288
<i>Changing the Status Manager for Task Assignments</i>	290
Managing Project Deliverables	293
<i>Adding a New Deliverable in Project Professional 2007</i>	293
<i>Adding a New Deliverable in Project Web Access</i>	295
<i>Updating Deliverables in Project Professional 2007</i>	303
<i>Adding a New Deliverable Dependency</i>	306
Module 08: Tracking Time and Task Progress	311
Tracking Time in Project Web Access	313
<i>Creating a New Timesheet</i>	313
<i>Understanding the My Timesheet Page</i>	319
<i>Entering Time in the Timesheet</i>	323
<i>Editing an Existing Timesheet</i>	333
<i>Submitting a Timesheet for Approval</i>	333
<i>Recalling a Submitted Timesheet</i>	337
<i>Deleting a Timesheet</i>	338
<i>Responding to a Rejected Timesheet</i>	339
<i>Planning Administrative Time</i>	342
<i>Creating a Surrogate Timesheet</i>	346
Tracking Task Progress in Project Web Access	351
<i>Understanding the My Tasks Page</i>	351
<i>Understanding the Assignment Details Page</i>	359
Reporting Progress from the My Tasks Page	362
<i>Using Percent of Work Complete</i>	362
<i>Best Practice: Using Percent of Work Complete</i>	368
<i>Using Actual Work Done and Work Remaining</i>	369
<i>Best Practice: Using Actual Work Done and Work Remaining</i>	371
<i>Using Hours of Work Done per Period</i>	373
<i>Best Practice: Using Hours of Work Done per Period</i>	376
<i>Reporting Progress from the Assignment Details Page</i>	380
<i>Importing Progress from the My Timesheet Page</i>	383
Using Other Task Activities	386
<i>Reassigning Work to Another Resource</i>	386
<i>Self-Assigning Team Tasks</i>	389
<i>Creating or Self-Assigning a New Task</i>	393
<i>Deleting Tasks</i>	396
<i>Creating a New Personal Activity Plan</i>	400
Using the Task Center	411
Module 09: Working with Outlook	415
Installing the Outlook Add-In	417

Using the Outlook Add-in	420
<i>Setting Outlook Add-in Options</i>	<i>422</i>
Managing Project Tasks in the Outlook Calendar.....	427
<i>Managing Project Tasks in the Outlook Tasks List</i>	<i>431</i>
Module 10: Approving Time and Task Progress	435
Viewing Unsubmitted Timesheets	437
Viewing and Adjusting Submitted Timesheets	441
<i>Adjusting Timesheet Updates.....</i>	<i>445</i>
Approving Timesheets.....	448
<i>Approving High-Level Timesheet Information.....</i>	<i>448</i>
<i>Approving Detailed Timesheet Information</i>	<i>449</i>
<i>Recalling an Approved Timesheet</i>	<i>450</i>
Approving Administrative Time Requests.....	452
Viewing Task Updates	457
Approving Task Updates.....	464
<i>Approving Task Updates in Project Professional 2007.....</i>	<i>470</i>
<i>Rescheduling Uncompleted Work in Past Reporting Periods.....</i>	<i>476</i>
<i>Updating Expense Cost Resource Information</i>	<i>478</i>
<i>Publishing the Latest Schedule Changes.....</i>	<i>482</i>
Viewing the Task Updates History	484
Creating Rules for Accepting Task Updates	488
Closing Tasks to Update	496
Axioms for Success with Tracking Progress	500
Module 11: Variance Analysis and Plan Revision	501
Understanding Variance	503
<i>Understanding Variance Types</i>	<i>503</i>
Analyzing Project Variance.....	504
<i>Analyzing Date Variance.....</i>	<i>504</i>
<i>Analyzing Work Variance.....</i>	<i>507</i>
<i>Analyzing Cost Variance.....</i>	<i>508</i>
Revising a Project Plan.....	511
<i>Potential Problems with Revising a Plan.....</i>	<i>511</i>
<i>Revising Deliverable Dates</i>	<i>512</i>
Using a Change Control Process	517
<i>Inserting New Tasks in a Project</i>	<i>517</i>
Rebaselining Your Project	520
<i>Backing Up an Original Baseline</i>	<i>520</i>
<i>Rebaselining Only Unstarted Tasks</i>	<i>522</i>
Module 12: Managing Personal Settings.....	525
Personal Settings Overview	527
Changing Your Password.....	528

Managing Alerts and Reminders for Yourself.....	529
Managing Alerts and Reminders for Your Resources	531
Managing My Queued Jobs	535
Module 13: Working with the Project Workspace	539
Understanding the Project Workspace	541
Managing Risks	544
<i>Creating a New Risk</i>	<i>544</i>
<i>Working with Existing Risks</i>	<i>553</i>
<i>Restoring a Deleted Risk from the Recycle Bin</i>	<i>561</i>
Managing Issues	564
<i>Creating a New Issue.....</i>	<i>564</i>
<i>Working with Existing Issues</i>	<i>566</i>
Viewing Your Assigned Issues and Risks	569
Managing Project Documents.....	572
<i>Viewing and Creating Document Libraries.....</i>	<i>572</i>
<i>Uploading Documents to a Document Library.....</i>	<i>576</i>
<i>Creating a New Folder in a Documents Library</i>	<i>582</i>
Working with Existing Documents in a Documents Library	586
<i>Viewing Document Properties</i>	<i>587</i>
<i>Editing Document Properties.....</i>	<i>591</i>
<i>Editing a Document</i>	<i>592</i>
<i>Checking Out a Document Manually.....</i>	<i>595</i>
<i>Viewing the Version History for a Document</i>	<i>600</i>
<i>Deleting a Document</i>	<i>604</i>
<i>Sending a Document to another Location or Application</i>	<i>604</i>
<i>Subscribing to E-Mail Alerts about a Document</i>	<i>607</i>
Accessing the Public Documents Library	611
Managing Tasks.....	613
<i>Creating a New Task.....</i>	<i>613</i>
<i>Working with Existing Tasks</i>	<i>615</i>
Using Calendars	618
<i>Creating a New Calendar Event.....</i>	<i>618</i>
<i>Working with Existing Calendar Events.....</i>	<i>624</i>
Using Team Discussions	629
<i>Creating a New Team Discussion.....</i>	<i>629</i>
<i>Working with a Team Discussion</i>	<i>631</i>
Accessing the Project Workspace from Project Professional 2007	639
Module 14: Project Workspace Advanced Features	643
Using Project Workspace Advanced Features.....	645
Editing in a Datasheet	646
<i>Using the Task Pane</i>	<i>648</i>
<i>Adding Totals to the Datasheet View.....</i>	<i>657</i>
Opening Document Libraries with Windows Explorer	661

Exporting to a Spreadsheet	664
Opening with Access	665
Creating a Visio Diagram	667
Connecting to Outlook.....	673
<i>Connecting from a Document Library.....</i>	673
<i>Connecting from the Calendar Page.....</i>	677
<i>Connecting from the Tasks Page</i>	678
<i>Connecting from the Team Discussions Page</i>	679
Viewing an RSS Feed.....	680
Setting Alerts	686
Creating a Column.....	688
Managing Project Workspace Views.....	693
<i>Creating a Standard View.....</i>	694
<i>Creating a Calendar View</i>	699
<i>Creating an Access View</i>	701
<i>Creating a Datasheet View</i>	704
<i>Creating a Gantt View.....</i>	704
<i>Modifying Existing Views</i>	706
Modifying List Settings.....	709
<i>Specifying Title, Description, and Navigation Settings</i>	710
<i>Specifying Versioning Settings</i>	711
<i>Specifying Advanced Settings</i>	714
<i>Setting Content Types</i>	715
<i>Deleting a List Type.....</i>	717
<i>Saving a List as a Template.....</i>	718
<i>Specifying Columns Settings.....</i>	720
<i>Specifying Workflow Settings.....</i>	724
<i>Specifying RSS Settings</i>	730
<i>Specifying Views Settings.....</i>	733
Managing the Project Workspace	735
<i>Creating New Site Content</i>	736
<i>Editing a Project Workspace Page.....</i>	741
<i>Modifying the Site Settings.....</i>	747
Module 15: Working with Status Reports	763
Requesting a Status Report.....	765
<i>Editing and Deleting Status Reports.....</i>	769
Responding to a Status Report Request	770
<i>Submitting an Unrequested Status Report.....</i>	774
<i>Viewing the Status Report Archive.....</i>	775
Viewing Status Report Responses	779
<i>Viewing Unrequested Status Reports</i>	782
Module 16: Working in the Resource Center.....	785
Using the Resource Center	787
<i>Applying Resource Center Views</i>	788

Contents

<i>Selecting and Deselecting Resources</i>	789
Viewing Resource Availability	790
Viewing Resource Assignments.....	797
Editing Resource Details	800
<i>Editing Details Individually for a Group of Resources.....</i>	803
<i>Editing Resource Information in Project Professional 2007.....</i>	805
Module 17: Working in the Project Center.....	807
Using the Project Center	809
<i>Using Project Center Views.....</i>	810
<i>Working with Detailed Project Views</i>	815
<i>Navigating to the Project Workspace.....</i>	819
<i>Editing Project Properties</i>	821
<i>Opening Projects from the Project Center.....</i>	826
<i>Checking In a Project.....</i>	830
<i>Closing a Project to Updates</i>	831
Staffing a Project from the Project Center	832
<i>Creating a Resource Plan</i>	832
<i>Building a Project Team</i>	841
Module 18: Working with Data Analysis	847
Understanding OLAP Concepts	849
Understanding Data Analysis Views	852
Using Data Analysis Views	854
<i>Customizing a Data Analysis View</i>	858
<i>Using the Data Analysis Toolbars.....</i>	863
Index	869

About the Authors

Gary Chefetz is the founder and President of MSProjectExperts, which exists 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 or e-mail him at:

gary_chefetz@msprojectexperts.com

Dale Howard is an enterprise project management trainer/consultant and is Vice President of Educational Services of MSProjectExperts. Dale possesses the Certified Technical Trainer (CTT) and Microsoft Certified Technology Specialist (MCTS) certification for Microsoft EPM, and has more than 15 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 has continued to receive the prestigious Most Valuable Professional (MVP) yearly award for Microsoft Project since 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 or e-mail him at:

dale_howard@msprojectexperts.com

Download the Sample Files

To download the sample files for this book, point your browser to the following URL:

<http://www.msprojectexperts.com/managing2007>

Introduction

Thank you for choosing *Managing Enterprise Projects Using Microsoft Office Project Server 2007 Second Edition*, an unprecedented learning guide and reference for project managers who use the Microsoft EPM platform. This edition covers Project Server and related SharePoint changes through the July 14, 2008 Infrastructure Update. Service Pack 2 for Microsoft Office Project 2007 and Microsoft Office Project Server 2007 was not yet available at the time of this writing. Our goal for this book is to provide a combination of training and reference manual; a vital learning tool to help you build on your knowledge of the stand-alone tool by mastering the Microsoft enterprise project management environment. Follow our best practices to success and heed our warnings to avoid the pitfalls.

We take a systematic approach to the topical ordering in this book, beginning with a Project Server 2007 overview in Modules 01 and 02. Module 03 teaches you how to use two new features in Project Server 2007: Proposals and Activity Plans. In Modules 04-07, you learn to use Project Professional 2007 to define, plan, baseline, and publish an enterprise project. Modules 08-10 take you through the project updating process from team member progress reporting in Project Web Access and in Outlook, through your acceptance of the updates into the enterprise project plan. Module 11 wraps up with analyzing project variance. In Modules 12-15, you learn how to set up personal options, how to use the features in the Project Workspace, and how to create Status Reports. Modules 16-18 cover viewing enterprise project information and teach you how to use Data Analysis.

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 avoid the most common problems experienced by others and Best Practices provide tips for using the tool based on our field experience.

With this book, we believe that you can become more effective at 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