

Overview

The Project Server 2007 Administration class entails building a Project Server Configuration from "scratch". This entails discussion of each of the configuration settings as we configure Project Server. Since small classes are conducted, we have the opportunity to address each individual's environment to discuss and recommend project server configuration settings appropriate to their requirements.

For each section below, the Administrative Requirements to maintain and mature your Project Server 2007 configuration are discussed and defined. Each individual will discuss, configure, test and administer a project server configuration applicable to their organizational requirements.

Enterprise Global

- Discussion on the Enterprise Global and Enterprise Objects versus Local Objects
- Discussion of compliant and consistent behavior working with the Enterprise System.

Enterprise Calendars

- Availability for Project Work
- Discussion on Enterprise Calendars and their interaction with Projects, Resources and Tasks

Enterprise Custom Fields

- Discussion on Enterprise Custom fields, the foundation for grouping, sorting and filtering data on Project Management Views / Reports.
- Create Lookup Fields
- Create Enterprise Field
- Graphical Indicator Creation through Custom Fields (VBA formula/code to derive a custom field value)

Enterprise Resource Pool

- Discussion on the Enterprise Resource Pool, maintaining integrity, determining demand/capacity/utilization through "skills" based resource management.
- Create Resources
 - Work (human)
 - Generic
 - Material
 - Cost / Budget
- Assign Resource Calendars
- Assign Enterprise Code Values
- Modify Resource Sheet View to include Resource Custom Fields

Define Project Server Settings

- Financial Periods
- Timesheets
 - Discussion of Timesheets / project status updates, timesheet / status reporting cycle.
 - Timesheet Periods
 - Timesheet Classification
 - Timesheet Settings and Defaults
 - Administrative Time
- Task Updates - Project Status
 - Task Settings and Display
 - Close tasks to Update
- Look and Feel
 - Grouping Formats
 - Gantt Chart Formats
 - Quick Launch
- Security
 - Discussion of the multiple approaches Project Server Security definition and maintenance.
 - Global Permissions - Project Web Access Permissions
 - Security Templates
 - Manage Categories
 - Manage Groups
 - Manage Users
- Cube settings, generation and display.
 - Discussion of the data analysis features of Project Server 2007

Data Generation / Testing of Project Server Settings

- Discussion on Project Plans, Activity Plans, Proposals.
- Log-In as a Project Manager

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Data Generation / Testing of Project Server Settings (cont'd)

- Creation of Project Template Populated with Generic Resources
- Creating multiple project plans from the project plan template and replacing Generic resources (building a team)
- Publishing of Project Plans
- Discussion of
 - the Project Cache
 - checked out projects
 - the Project Server Queue
 - Manage Queue
 - Queue Settings

Manage Views

- Discussion of Project Web Access and Project Professional Views.
- Creation of Project Web Access Views, including Data Analysis Views.

Testing / Validation of Configuration Settings

- Discussion on Role Based Testing, Training and Knowledge Validation
- Log-in as a Team Member
 - Discussion of the Team Member functionality
 - My Tasks
 - Timesheets
 - Administrative Time
 - SharePoint Access

- Log in as a Resource Manager
 - Approve Timesheets
 - View status and assignments
- Log-in as Project Manager
 - Accept status updates

Review Functional Administrative Requirements

- Perform exercises / validate Project Server Administration Knowledge
 - Create / Update Enterprise Calendars
 - Check-in Enterprise Projects or Resources
 - Create external stakeholder with unique security permissions, view of only one project and one resource
 - Build the data cube
 - Review data queue information
 - Modify the Enterprise Global

End of Class

- Address "Parking Lot" issues (issues not able to fully address in class due to time constraints)
- Again discuss the requirement for consistency and compliance to obtain valid, meaningful metrics.
- Discuss maturation of your Project Server configuration - based on the organization's project management maturity and performance in consistent, compliant use of an enterprise project management system.