WEB 3

Customizing and Administering Project Server Access

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This chapter describes how to customize and administer Project Web Access for both the Standard and Professional editions of Project 2002. The user interfaces for customizing and administering Project Web Access for the Standard and Professional editions are almost identical. You will find notes in the text where there are differences between the two products.

In some cases Professional edition parameters and options are available in the Standard edition. You can ignore those parameters and options; setting them does not affect how the Standard edition operates.

CREATING AND DELETING USERS FROM PROJECT SERVER

Every user of Project Server must have his or her own account with which to log on. The following sections describe how to manually create and delete user accounts, and then it addresses the idea of having these accounts created automatically by Project Server.

CREATING A NEW USER ACCOUNT

You can follow these steps to create a new user account in Project Server:

1. From within Project Server, select Admin, Manage Users and Groups. A grid of all the available user accounts appears.
2. Click the Add User button. The Add User screen appears. First, you must select how this user will be authenticated. Your two options are NT authentication and Microsoft Project Server authentication. For more information, see the section "Using Project Server and/or Windows NT authentication," earlier in this chapter.
3. After you have selected an authentication method, enter the user account. If you have selected NT authentication, enter the username that the resource uses to log on to Windows, including the domain name, as follows: `DOMAIN\username`. If you have selected Project Server authentication, enter the name of the resource, as it appears in the project plan, or as you will enter it in the future.
4. Enter the email address for the new resource.
5. If you are using NT authentication, enter the resource's name in the User Name field. If you are using Project Server authentication, you must create a password for the account. Enter the new password in the Password and Confirm Password boxes.
6. Select the group(s) of which this user is a member. Under the Groups heading, select the group(s) that you want this user to be a member of, and then click Add.
7. Under the Categories heading, select the category or categories that you want this user to have access to, and then click the Add button.
8. Under the same Categories heading, select which permissions, if any, you would like to define for the categories you selected. First, in the Selected Categories box, click the category for which you would like to define permissions. Then, in the box below, check the options you want to allow or deny this user. Optionally, you can select options based

on predefined templates (see "Using Security Templates," later in this chapter) by selecting a template from the drop-down list and clicking the Set Permissions with Template button.

NOTE

If you add a user to multiple groups, it is possible that the permissions associated with the each group's categories may conflict. That is, Group A may allow an option, and Group B may deny or not specify an option. The following rules govern this situation:

- If any group's permissions specifically deny an option, then that option is denied for the user, even if other group permissions assigned to the user specifically allow the option.
- If no group's permissions specifically deny an option and at least one group's permissions allow the option, then that option is allowed for the user.
- If no group's permissions specifically deny or allow an option, then that option is denied for the user.

If a feature is configured as being not available for a Project server via the Manage Organization screen, then that feature's unavailability overrides any permissions that are allowed on a user or group basis.

9. Under the Global Permissions heading, set global permissions for the user. The process to do this is the same as the process used in step 8.
10. When you are finished, click Save Changes.

NOTE

When a project manager publishes a schedule to a Project server, all resources in that schedule that don't already have Project server accounts have them created automatically and are assigned to the Team Member group.

NOTE

For the Professional edition: Adding users to a Project server doesn't automatically add them to the enterprise resource pool.

MANAGING USER GROUPS

Similar to the way you create users, you can create groups to define what permissions a particular subset of users has permission to access. To do so, follow these steps:

1. From within Project Server, select Admin, Manage Users and Groups. A grid of all available user accounts appears.
2. Select Groups of Users under the heading, Add, Modify, and Delete. You are presented with a list of all the groups that are currently defined. In this case, we will take a look at adding a new group.
3. Click the Add Group button.

4. The first field that appears, Group Name, is the name of the group that you would like to create. The name you add here can be as descriptive as you want it to be. The second field on this screen, Description, is optional, and it simply appears to make it easier to distinguish what the function of this particular group is.
5. The next two selection boxes, Users and Categories, allow you to specify what users and categories are members of the new group. For more information on creating users and categories, see the preceding section.
6. The next two permission boxes can be set by using templates, which are discussed in further detail in the next section of the chapter. Simply select which template you would like the group's permissions to be based on, and click the Set Permission with Template button.
7. Finally, you have the ability to set the default digital dashboard link for members of the group. If your organization is using a digital dashboard, you can specify here the location of the specific dashboard you would like the group to see. To modify an existing group, simply select the group from the list and follow steps 1 through 6. To delete an existing group, simply select the Group from the list and click the Delete Group button.

NOTE

When a user publishes a schedule to a Project server, that user becomes a project manager for that project and is automatically assigned to the Project Manager group if he or she is not already.

PROJECT SERVER USER SECURITY

This section deals with security settings—specifically how user accounts can be created through an automated process. The following sections describe how to create accounts from workgroup messages and status reports.

CREATING ACCOUNTS FROM WORKGROUP MESSAGES AND/OR STATUS REPORTS

Project Server user accounts can be created in several ways. One way is to have them created automatically when workgroup updates are sent and when status reports are requested. In addition, other resources can create user accounts when they delegate tasks. The following sections describe each option, how to activate and deactivate each option, and what consequences are associated with each.

CREATING ACCOUNTS THROUGH WORKGROUP UPDATES AND/OR STATUS REPORTS

When you're creating a project plan in Microsoft Project and creating a set of resources, some of those resources might not have accounts in the Project server. If they don't, when you update your project plan to the Project server, you have the option of having the system automatically create new accounts for those users. To verify whether this option is turned on, follow these steps:

1. From within Project Server, select Admin, Manage Organization.
2. Under Organization Options is a grid with the Account Creation features displayed. Four options are presented. From here you can allow or deny any or all of these features.
3. When you are finished, click Save Changes.

Creating Accounts When Delegating Tasks

You can turn on or off the option to create a user account when delegating a task by following these steps:

1. From within Project Server, select Admin, Manage Security.
2. Under Security Options, select Specify How User Accounts Should Be Created.
3. Two options are presented. The second, Allow Resources to Create Accounts for Other Resources While Delegating Tasks, is the choice you want to review at this time. If the check box for this option is selected, accounts are automatically created while you are delegating tasks. If you want to remove this capability, deselect the box.
4. When you are finished, click Save Changes.

Using Categories to Control Access to Project Information

Project Web Access uses categories to limit the information a user can view.

To edit category information, select Manage Security, and then select Specify Security on Collections of Projects, Resources, and Assignments. The Project Web Access security model can be summarized by the following:

- Each category is assigned one or more views that members of the category can view.
- Each category is assigned one or more resources who can access the views assigned to the category.
- Each category is assigned one or more groups, and the users of these groups can access the views assigned to the category.
- A resource can be assigned to one or more groups. Assigning resources to groups is optional.
- Categories specify which projects and assignments its members can view.

Categories also control specific functionality in Project Web Access that pertains to the editing of project plans and enterprise resource data.

USING SECURITY TEMPLATES

With Microsoft Project 2002, the Project Server administrator can specify exactly which options each user can access, by using security templates. These templates allow an administrator to base a new user's security privileges on a predefined set of rules.

MODIFYING EXISTING SECURITY TEMPLATES

To modify an existing template, follow these steps:

1. From within Project Server, select Admin, Activities, Manage Security.
2. Under Security Options, select Create and Edit Templates of Security Permissions.
3. You should now see a grid, like the one shown in Figure 1, that lists all the security groups within the Project Server environment. For this example, modify the Executive group and remove the ability for users within that group to change their passwords.
4. Select Executive from the grid, and then click the Modify Template button.
5. You should now a see a list of all the features in Project Server and whether this particular group has access to them. Scroll down until you reach the General heading, under which you should see Change Password. By default, the Allow check box is selected. Click this check box to deselect it.
6. Select the check box under the Deny column and then click Save Changes.

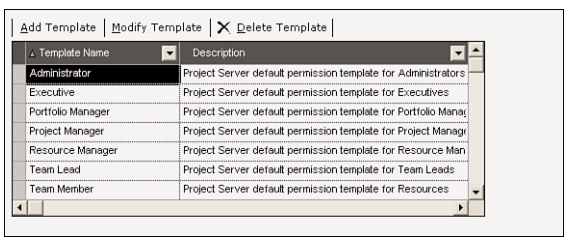


Figure 1
You can modify security settings by selecting the template and clicking Modify Template.

TIP

If you want to change the options under a particular heading, select the Allow or Deny check box in that heading's row. This automatically checks all the options under that heading for the choice you have selected.

ADDING SECURITY TEMPLATES

After you have changed an existing template, you are returned to the Security Templates page. To add a new security template, follow these steps:

1. Click the Add Template button. The Add New Template window opens.
2. Enter the name of the new template you want to create.
3. The Description box is optional. If you want to see a description when you are looking at your templates, enter it here.

4. If you want to base the new template on an existing template, select the existing template from the drop-down list. This is another optional selection.
5. When you are done, click OK to save your changes.

Deleting Security Templates

The only security templates you can delete are those that are custom templates you have created. Therefore, if you select a default template and click Delete Template, you get an error message, telling you that the action is not allowed. To delete a custom template that you created, follow these steps:

1. Make sure you are still on the Security Templates page. If you are not, select Admin, Activities, Manage Security. Then, under Security Options, select Create and Edit Templates of Security Permissions.
2. Click the name of the custom security template that you want to delete.
3. Click Delete Template. You are prompted to confirm your choice. If you are sure you want to delete the template, click Yes. You then receive a confirmation box, telling you that the template has been deleted.

Authentication Options

When you are deciding how users are going to be accessing Project Server, you can choose among several authentication options, based on your individual needs. In most cases, using Windows NT authentication will provide the easiest method, as users will not have to remember an additional username and password. In relationship to functionality, Windows NT and Project Server authentication are the same.

Using Project Server and/or Windows NT Authentication

Project Server authentication lets users log in using the predefined logins within Project Server. The method in which users are logged in to Windows will have no effect on their Project Server accounts.

If an organization chooses to use Windows NT authentication only, those with Project Server accounts will not be allowed to log in. These logins are based on the method in which the current user is logged in to Windows.

In a mixed environment, both of these authentication schemes are available and can be used in conjunction with one another.

Microsoft Project Server Authentication Only

Each user must log in to Project Server by going to the Project Server home page and then entering his or her username and password. This method has no association with the current user that is logged in to Windows.

WINDOWS NT AUTHENTICATION ONLY

When you use the Windows NT authentication method for logging in to Project Server, user security is based on the account that is currently logged in to Windows. When the user tries to access the Project Server homepage, he or she is not presented with the Project Server login screen but is instead taken directly to the Project Server home page, already logged in.

MIXED AUTHENTICATION

Choosing this method of authentication allows users to log in using both Project Server and Windows NT authentication.

CHANGING THE AUTHENTICATION METHOD

You can change the authentication option that your Project Server environment is using by following these steps:

1. From within Project Server, select Admin, Activities, Manage Security.
2. Under Security Options, select Specify How Users Should Be Authenticated by the Microsoft Project Server. You have three options, as shown in Figure 2.

Figure 2
You can easily change the authentication options for your s erver to Windows, Project Server, or mixed.

THE AUTHENTICATION OPTIONS SCREEN

The authentication options screen gives you the following options about how your environment should operate:

- **Specify How Users Should Be Authenticated by the Microsoft Project Server**—As discussed previously, you can select the authentication option your environment will use. To do so, click the button next to your selection.
- **Password Length for Microsoft Project Server Authentication**—This option allows you to set the minimum length of user passwords for Microsoft Project Server authentication. To change this, simply replace the existing value in the text box.

NOTE

If you decide to change the minimum password length after accounts have already been created, the change will not affect them. The new length requirement applies only to new accounts that are created and to passwords that are changed on existing accounts.

- **Authentication Required When Publishing from Microsoft Project**—This option forces Microsoft Project to authenticate against Project Server before publishing any projects. Microsoft Project 2002 clients can publish projects only if this option is off.

CREATING CUSTOM VIEWS

Project Web Access in Project 2002 expands the exciting Web-based reporting features of Project Central in Project 2000. With the expansion of these features, a project manager is now able to share information with co-workers, managers, and executives at every level of the organization. Project Web Access now offers five different views. Table 1 describes the intended use of each view.

TABLE 1 AVAILABLE PROJECT WEB ACCESS VIEWS

View	Purpose
Project	A Project view provides a detailed account of a single project. A project manager would use this type of view to track and refine a project schedule.
Project Center	A Project Center view provides a high-level overview of multiple projects. An executive would use this type of view to examine project performance across the organization. Two Project Center views, the Portfolio Modeler and the Portfolio Analyzer, are available only in the Professional edition.
Assignment	An Assignment view provides assignment details for one or more resources. A team leader would use this type of view to monitor the work load of his or her team.
Resource Center	A Resource Center view provides a high-level overview of multiple resources. A resource manager would use this type of view to examine resource workloads across the organization.
Portfolio Analyzer	A Portfolio Analyzer view provides powerful analysis capabilities directly to Project Server users. This type of view utilizes Microsoft SQL Server 2000 Analysis Services to generate OLAP cubes for querying data. The Portfolio Analyzer view is available only in the Professional edition.

To create a new view or modify an existing view, select Manage Views and Create, Modify, and Delete Views from the Actions pane. Then select Add View to create a custom view.

At the top of the page, you can select any of the five available views. The information displayed in the bottom sections of this page differs, depending on which view is selected. The specifications for each view have common sections, and the following sections cover each of the available sections and how to create a Portfolio Analyzer view.

TABLE SELECTION

For Project views, you must select the type of information you want displayed in the view. You can choose to display task, resource, or assignment information.

AVAILABLE FIELDS

You can select the fields you want in your view and move them into the Displayed Fields window. Using the Up and Down buttons, you can set the display order of the fields. The top item in the Displayed Fields window will be the leftmost item on the screen. You should limit the number of fields selected to a number that can be displayed on the screen without requiring the user to scroll left to right.

GANTT CHART FORMAT

The Gantt Chart Format option allows you to select from the list of available Gantt chart formats. Project Server also offers the capability to define and configure all available Gantt chart formats. To configure Gantt chart formats, select Custom Microsoft Project Web Access and then Gantt Chart Formats from the Actions pane. The dialog box shown in Figure 3 appears.

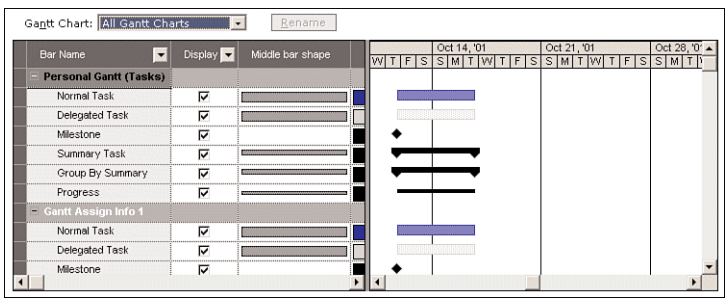


Figure 3
To rename a Gantt chart format, select the format from the drop-down list and then click the Rename button.

Type the new name in the New Name for Gantt Chart window, and then click the green checkmark to save the changes.

To modify the appearance of a Gantt chart format, select Format from the drop-down list. Then select Bar Types to Display by using the check boxes in the Display column. You can modify the appearance of any bar type by selecting the desired shape, color, pattern, endpoints, and dates from the corresponding drop-down lists.

GROUPING STYLE SCHEME

You use Grouping Style Schemes to control the appearance (that is, the color and font) of the grouping bands. You do not use schemes to designate which fields are grouped. To customize a grouping style scheme, select Custom Microsoft Project Web Access, and then select Group Formats from the Actions pane.

You can rename and customize grouping style schemes by following the same steps you follow to customize Gantt chart formats.

FILTER

You use the Filter section to limit the number of rows displayed in a customized view. Filter specifications are optional. Each row in the filter specifications grid is an independent Boolean statement that can be joined with another statement by using and or or.

NOTE

If a task has not started, the value for Actual Start is NA. The same applies for all other date fields.

AVAILABLE CATEGORIES

The Available Categories section allows you to assign a new view to specific categories (see Figure 4) so that users belonging to these categories can use the view.

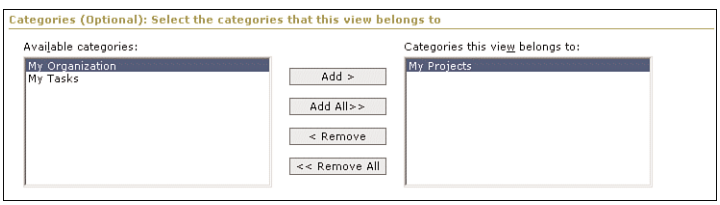


Figure 4
You can move all categories to which the view belongs into the window on the right.

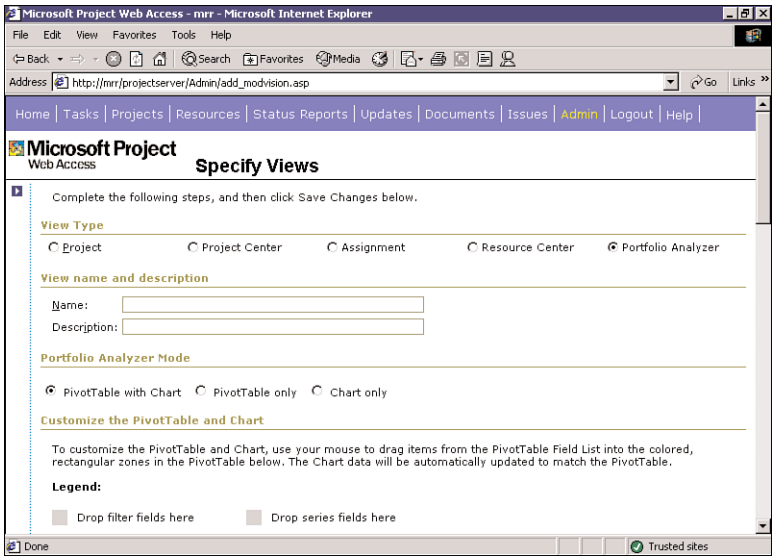
CAUTION

Be sure to click Save Changes before leaving the Specify Views page, or you will lose your changes.

CREATING A PORTFOLIO ANALYZER VIEW

To create a Portfolio Analyzer view, you need to select Admin, Manage Views, Add View and then select the Portfolio Analyzer radio button, as shown in Figure 5.

Figure 5
You can choose the Portfolio Analyzer view radio button and give the view a name.



Following are the steps and parameters associated with creating a new, or modifying an existing, Portfolio Analyzer view:

1. Provide a unique name for the view and describe the view.
2. Specify the type of view to be created. There are three mutually exclusive view options:
   - **PivotTable only**—Creates a View that contains numeric data only.
   - **Chart Only**—Creates a view that contains graphically displayed data only.
   - **PivotTable with Chart**—Creates a view that contains both the numeric data and its associated chart. This is the default option.

NOTE

In order to describe all components of the Portfolio Analyzer view definition, the following steps assume that the option selected is PivotTable with Chart. If either of the other two options is chosen, you will not see the relevant section of the entry screen displayed.

3. Initially the PivotTable is blank, as shown in Figure 6, but there are four distinct areas marked where data elements can be placed:
   - **Filter Fields**—The contents of this area act as filters for the incoming data. Information from the OLAP cube is displayed only if the incoming data meets the criteria that are defined here.
   - **Column Fields**—The fields in this area form the columns of the PivotTable spreadsheet.

- **Row Fields**—The fields in this area form the rows of the PivotTable spreadsheet.
- **Data Fields**—The data fields provide the values placed in each of the cells in the PivotTable spreadsheet.

These areas are often referred to as the drop zones, where fields from the field list can be dropped.

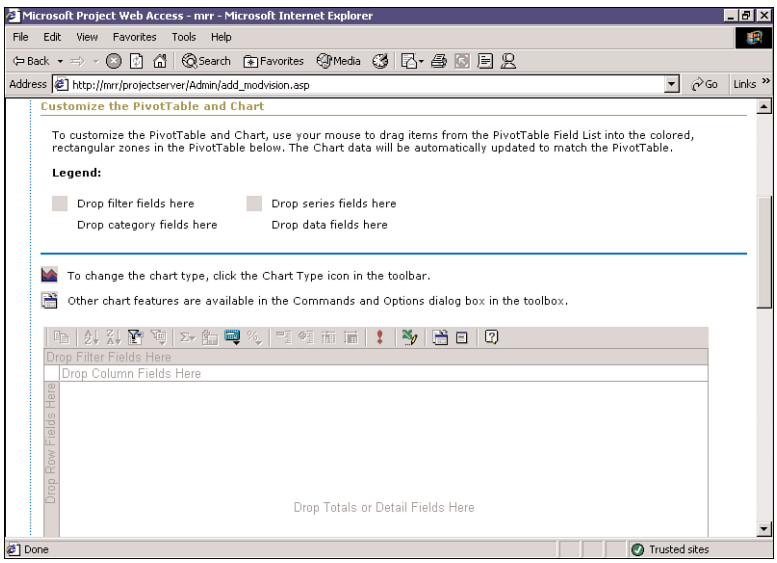
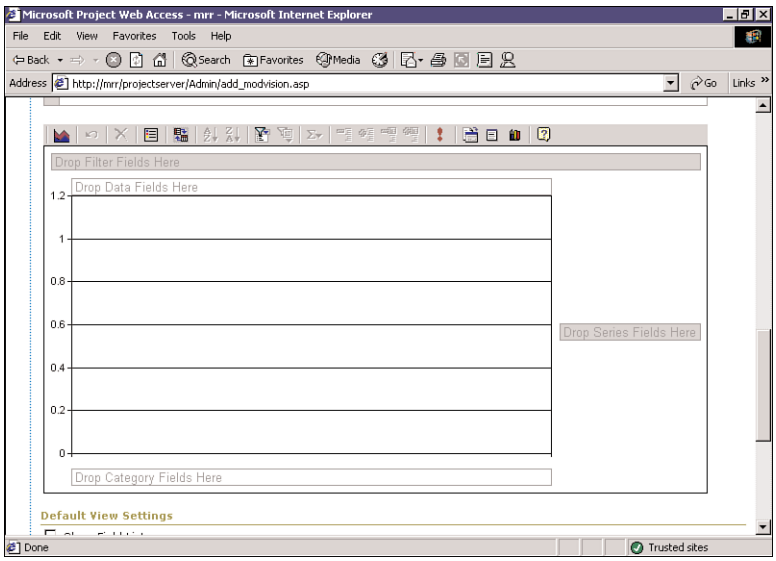


Figure 6
Note that the color coding of fields in an empty PivotTable maps to the different types of data that can be placed there.

4. Specify the Pivot Graph. If data has been placed in the PivotTable, the Pivot Graph will show that data; otherwise, the Pivot Graph is initially blank, as shown in Figure 7. Four distinct areas are marked where data elements can be placed on a Pivot Graph:
   - **Filter Fields**—The contents of this area act as filters for the incoming data. Information from the OLAP cube is displayed only if the incoming data passes the criteria that are defined here.
   - **Category Fields**—The fields in this area determine the column headings of the PivotTable and the names for different plotted lines in a line graph or columns in a column graph.
   - **Series Fields**—The fields in this area define the row labels in the PivotTable and the x-axis labels in the graph.
   - **Data Fields**—The fields in this area define the data that is shown in the row/column intersections in the PivotTable and that is plotted in the graph.

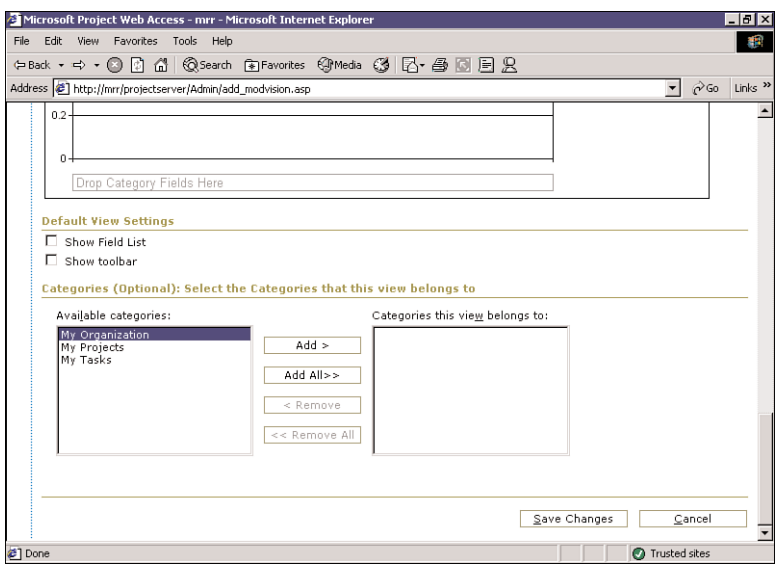
   These areas are often referred to as the *drop zones*, where fields from the field list can be dropped.

Figure 7
Note the color coding of fields in an empty Pivot Graph.



5. In the Default View Settings section, check either Show Field List or Show Toolbar to have those tools displayed by default when the user brings up this Portfolio view.
6. In the Categories section you can restrict which users are able to see the Portfolio Analyzer view by specifying which categories the view belongs to. The valid categories are stored in the right-hand pane. The left-hand pane contains the categories that have been defined by the administrator but that are not able to see the view being defined. You can move entries either from the left-hand pane to the right-hand pane or vice versa by utilizing the Add, Add All, Remove, and Remove All buttons, as shown in Figure 8.

Figure 8
You can specify the default view settings and the categories that the view belongs to.



Only users who have the correct authority as set by the administrator for the categories in the right-hand pane are able to see this view.

7. Populate the specific field areas in the PivotTable and/or Pivot Graph, as described in the next section, "Adding and Modifying Portfolio Analyzer View Data."

Adding and Modifying Portfolio Analyzer View Data

To add or modify Portfolio Analyzer View data, you need to be working with an existing Portfolio Analyzer view, as described earlier in this chapter.

The following steps describe how to add or modify data on a Portfolio Analyzer Pivot Graph; you can use exactly the same process to populate the PivotTable:

1. Right-click the graph area and select Field List from the list of options to bring up the Chart Field list. The Chart Field list contains a list of fields from the OLAP cube that can be used to populate the Portfolio Analyzer view with data.

   The Chart Field list contains two types of data: totals and dimensions:

   - **Totals**—These fields can be used to populate the Data section of the chart. To add a particular Totals field to the chart, simply drag the desired Totals field from the Field list and drop it into the Data section (colored yellow) of the chart.
   - **Dimensions**—These fields are used to subdivide and analyze the Totals data. To "slice and dice" Totals field data different ways, simply drag the desired Dimensions field from the Field list and drop it into the Filter (pink), Category (blue), or Series (green) section of the chart.

   The Chart Field List dialog box opens, with the Totals section expanded, as shown in Figure 9.

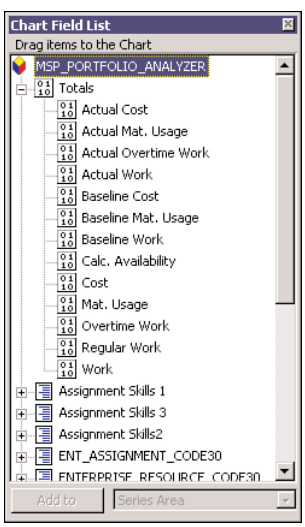


Figure 9
The Chart Field list contains the data items that can be used on a Pivot Chart.

The following standard dimensions are automatically created when the OLAP cube is generated:

- **Project dimension**—The Project dimension holds the names of all projects in the cube.
- **Project Version dimension**—The Project Version dimension holds each project and version combination.
- **Time dimension**—The Time dimension holds the day, week, month, quarter, and year time settings.
- **Resource dimension**—The Resource dimension holds the resource names in the cube.
- **Enterprise custom outline codes**—A dimension is created for each of the enterprise custom outline codes that has been defined in the Enterprise Global template. For example, if Enterprise (Resource) Custom Outline Code 1 has been defined as Skill, there is a Dimension called Skill. If the Skill code (Enterprise Custom Outline Code 1) has two levels, so will the Skill dimension.

Figure 10 shows how work changes over time by using the Time dimension as a category.

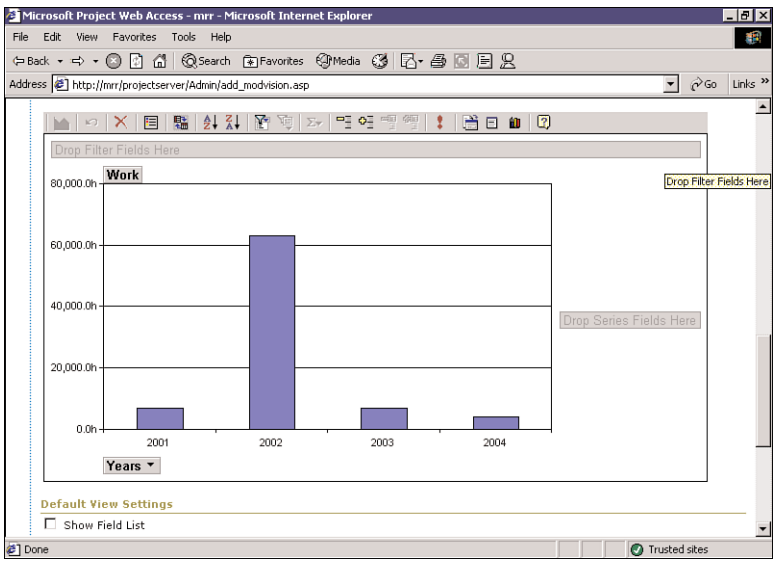


Figure 10
This chart displays work over time (years); however, any totals and dimensions can be displayed with the Time dimension.

To see how work is allocated across projects, the Project dimension could be used as a category. To see how work has changed in each project over time, the Project dimension could be used as a series and the Time dimension could be used as a category.

2. You can expand dimensions to reveal a lower level of data available for use. For example, expanding the Time dimension shows Day, Week, Month, Quarter, and Year.

To see how work has changed by year, then, the Year element of the Time dimension could be dragged to the Category box. This would show one column per year. To see it at a monthly level, you would drag the Month element instead.

3. Click on a Dimensions drop-down box to show the dimensions individual entries, as shown in Figure 11. By default all the entries are checked (that is, all skills are shown). If the list is changed, the chart is dynamically updated.

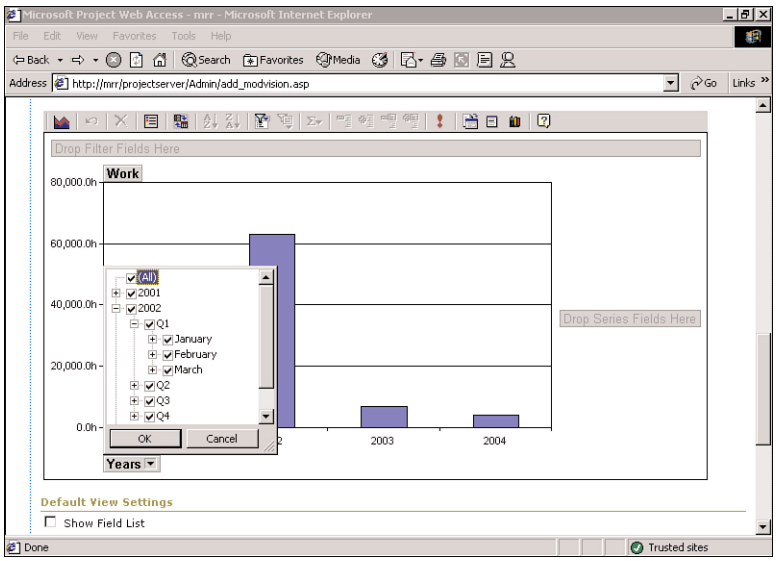


Figure 11
Clicking on the Time dimension's drop-down box allows you to dynamically modify the chart.

The first entry in the list is titled All. This box selects or deselects all the entries in the drop-down list. To select only a few entries from a long list, deselect the All box (deselecting everything) and then select the required entries individually.

4. To change the entries in any of the areas, first remove an existing entry. You change entries similarly to the way you add them. Click the field that needs to be removed and drag it away from the graph. You can drop it in the Chart Field list or anywhere off the chart. Then drag the new field from the Chart Field list to the required location on the chart.

MAKING ADDITIONAL PORTFOLIO ANALYZER VIEW CUSTOMIZATIONS

This section describes how to customize a Portfolio Analyzer view's graph types and how to modify the commands and options that are available to users when the Portfolio Analyzer view is displayed.

The default graph type is a two-dimensional bar chart; however, many other graph types are available. You can view these graph types by selecting the Chart Wizard icon on the far right of the toolbar or the Chart List icon on the far left of the toolbar.

The Command and Options icon on the toolbar allows the creator of the view to control what can be seen and what each part of the chart looks like. The following tabs appear in the chart workspace:

- **General**—This tab provides general formatting commands to a chart workspace or other chart areas, including the following:
  - **Add a Chart Legend**—Clicking on this icon (just below the word Add in the middle-left of the dialog box) adds a legend to the right-hand side of the chart. This then becomes another component of the chart, and if you click it or select it from the drop-down box in the General tab, you can modify it.
  - **Add a Chart Title**—Clicking on this icon (just below the word Add in the middle-left of the dialog box) adds a chart title to the top of the chart and creates another component of the chart. If the new component is selected and the Format tab is selected, you can change the content of the title, as well as the font, the size, and the emphasis of the text.
- **Border/Fill**—You can use the Border/Fill tab to change text and backgrounds.
- **Data Details**—The Data Details tab shows the data connection for the chart.
- **Type**—The Type tab shows and allows you to change the chart type.
- **3D View**—The 3D View tab changes the parameters for the 3D view, moving the perspective and lighting.
- **Series Groups**—The Series Groups tab allows you to merge and create a new series.
- **Show/Hide**—There is often a difference between the fields that are available to the creator and modifier of a Portfolio Analyzer view and the fields that are available to a general user or viewer. The Show/Hide tab determines what can be viewed when the chart is published, as shown in Figure 12.

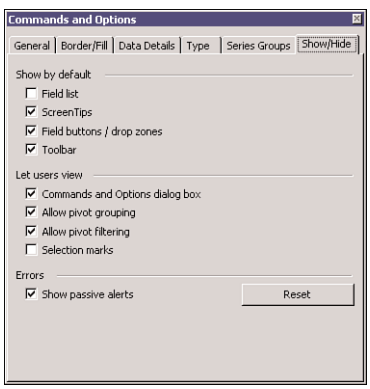


Figure 12
The creator of a Portfolio Analyzer view can establish what the viewer can see.

Following are the definitions for each Show/Hide tab item:

- **Field List**—If this is not checked, new fields cannot be identified or dragged to a drop zone on the chart.

- **ScreenTips**—If this is not checked, application hints are not displayed when the cursor hovers over certain areas of the screen.
- **Field Buttons/Drop Zones**—If this is not checked, then it is not possible to drag items from the Field list to the drop zone, but it is possible to add items to the chart from the Add To function at the bottom of the dialog box. It is not possible to remove items from the chart when this is not checked.
- **Toolbar**—If this is not checked, the bar at the top of the screen that controls the other functions is not displayed. With this checked, it is possible for the user to initiate the Command and Options dialog box and change the configuration.
- **Commands Options**—If this is not checked, the user cannot initiate the Command and Options dialog box by clicking on the chart.
- **Pivot Grouping**—If this is not checked, items in the drop zones can be filtered but not changed.
- **Pivot Filtering**—If this is not checked, the user cannot select or deselect any of the level entries from the fields entered in the drop zones.
- **Selection Marks**—If this is not checked, the marks that show the existence of the drop-down boxes for the drop zones are not displayed. This is only useful, for example, if the layout of any of the drop zones is such that the text and the box are not visible.

When you have finished specifying the PivotTable or Pivot Chart, click the Save Changes button. The new Portfolio Analyzer view should now be available to all users that belong to the categories to which you've assigned the view.

Setting Features Available on a Project Server

Project Server allows the administrator to control exactly which features of Project Web Access are available to users, on a global basis. To make changes to these settings or to view what features are currently enabled or disabled, complete the following steps:

1. Select Admin, Activities, Set Features Available to the Organization. You are presented with a grid of all the available options within Project Server. By default, all options have the Allow check box selected. To turn off any of these options, select the Deny check box for that option.
2. To turn off a particular set of common functions, select the Allow or Deny check box in the heading for that group, and all the choices within that group change.
3. When you are finished, click the Save Changes button at the top of the page.

Adding New Menu Choices

Project Server gives users the ability to easily customize the top-level menu choices as well as the items in the Activities area. The following sections describe how to add custom top-level and sublevel menu choices.

ADDING A CUSTOM TOP-LEVEL MENU CHOICE

To add a custom top-level menu choice to the Project Server menu structure, follow these steps:

1. Select Admin, Activities, Set Features Available to the Organization.
2. Select Organization Options, Define the Menus Displayed in the Web Client (see Figure 13). A grid that lists the complete menu breakdown of Project Server appears.
3. Click the Add Custom Menu button, and the Add Custom Menu window opens.
4. Add a Top Level Menu is the default selection and the only available choice. In the first box, enter the name of the top-level menu you would like to add. To add a ToolTip to this menu choice, enter it in the second box. Click OK.

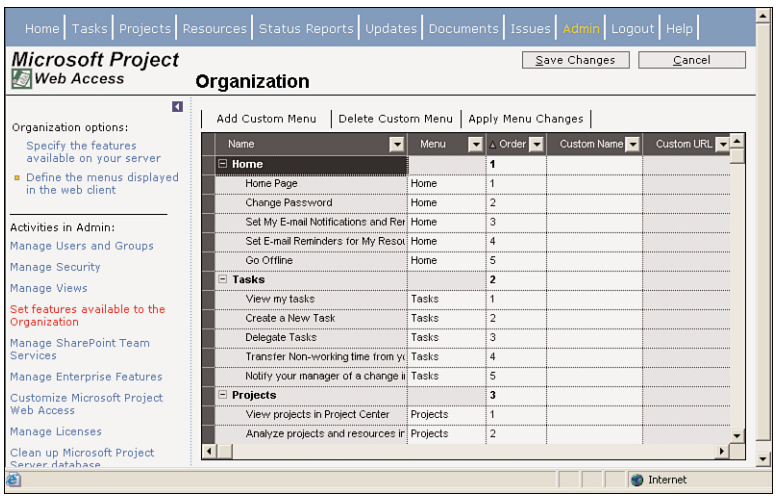


Figure 13
Adding custom menus to a project can help focus a team on individual tasks.

ADDING A CUSTOM SUBLEVEL MENU CHOICE

After you have created a custom top-level menu choice, you can add a submenu choice to it. To accomplish this, follow these steps:

NOTE

You can add a custom sublevel menu choice only to a custom top-level menu choice that you have created.

1. In the Define the Menus Displayed in the Web Client window, select the name of the new top-level menu choice that you just created and then click Add Custom Menu. The Add a Submenu option is now available and selected, as shown in Figure 14.

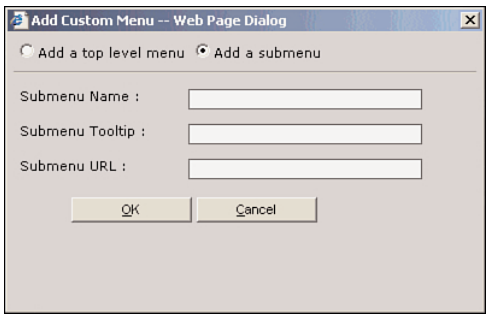


Figure 14
You can add a custom sublevel menu choice by filling in these fields.

2. In the first box, enter the name of the submenu choice you want to add.
3. If you want to add a ToolTip to this menu choice, enter it in the second box.
4. In the third box, enter the page you want the new menu choice to take you to.
5. When you are finished, click OK.

NOTE

When you have finished adding new menus, you can change the order in which they appear, either across the top menu or in the Action pane. To do this, you change the appropriate value in the Order column.

6. Before you leave this window, click Save Changes, in the upper-right corner, to ensure that you do not lose the new menus or any other changes you have made.

SharePoint Team Services

SharePoint Team Services (STS) adds to Project Server the ability to manage project documentation and issues. When a project plan is published to Project Server, an STS subweb is created for that project. Supporting project documentation and issues tracking is contained within that subweb.

Creating a Subweb

An STS subweb must exist before you can manage documents and issues for a given project. If a subweb does not already exist, you must create it. To do so, log on to Project Server as an administrator and select Manage SharePoint Team Services. Then select Manage SharePoint Subwebs for Microsoft Project Server. Select the project from the Provision a Subweb For drop-down menu, and then click the Create Subweb button.

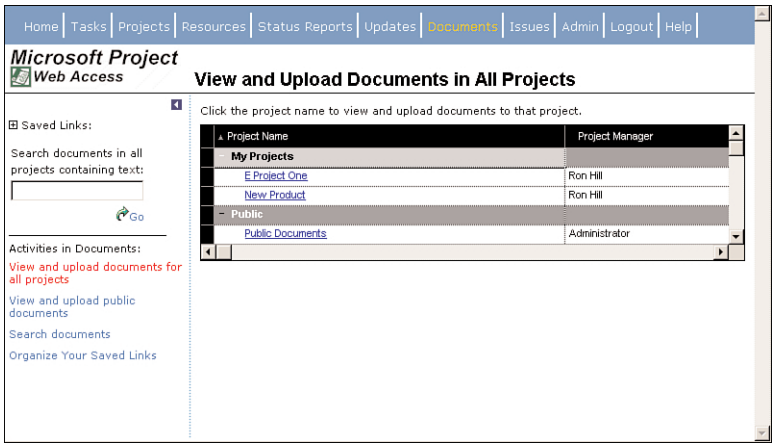
Setting Security for STS Functions

To give users access to STS functions, you must set application- and user-level options. At the application level, you must enable the Link Documents and Link Issues options. Users with access to View projects in drill-down views, View documents and issues, or Save project have access to these functions.

USING STS DOCUMENT LIBRARIES

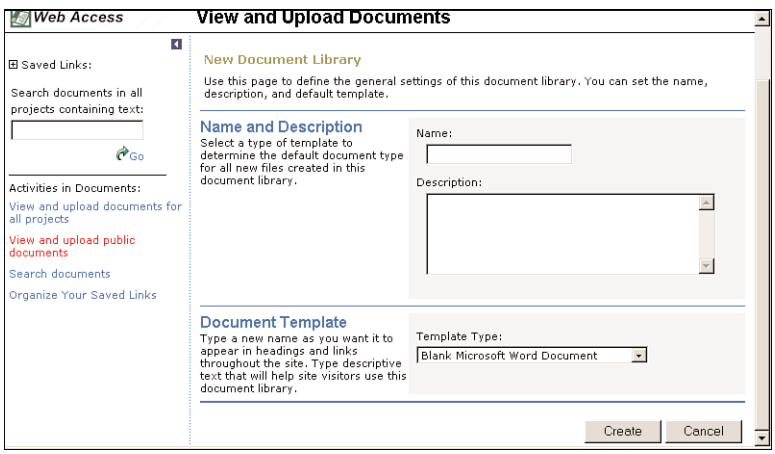
To access the document management functions of STS, select the Documents tab. From this page, you can manage documents in two types of libraries: public and project specific (see Figure 15). Public documents may contain such information as instructions to complete tasks contained in the methodology or organization-level templates and forms.

Figure 15
The SharePoint document library view lists public and project-specific documents.



Project Server is preconfigured with one public document library named Shared Documents. You can create additional public libraries by selecting View and uploading public documents from the Actions menu, and then selecting New Document Library, as shown in Figure 16. In the dialog box that appears, you provide a name, a description, and a template type for the new document library. The application associated with that template type is then used to create new documents directly in the document library.

Figure 16
You can create additional public document libraries in STS.



Managing Documents

The functions available to manage documents are the same for public and project-specific libraries. The sections that follow use the Shared Documents public document library, as shown in Figure 17.

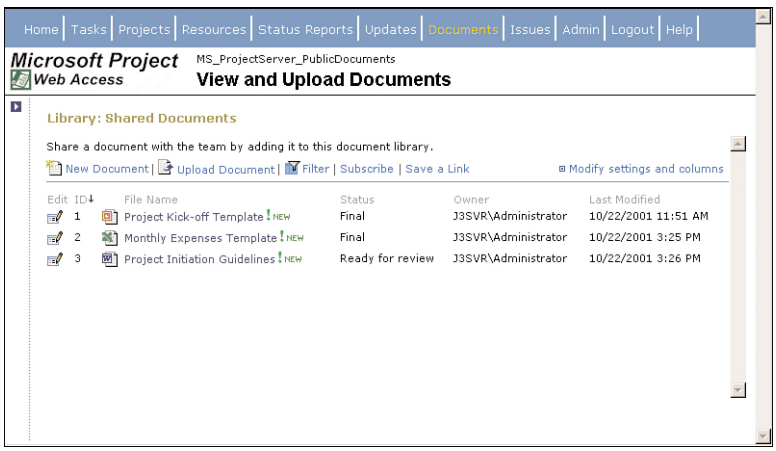


Figure 17
The STS Shared Documents library is a public document library that is pre-configured in Project Server.

The dialog box shown in Figure 17 provides access to all document management functions. From this dialog box you can create and upload documents, save hyperlinks, and manage your subscription notifications. To open a document, you click on the document name. To edit the library information for a document, such as the owner or status, you click the icon in the leftmost column.

Creating a New Document

When you click the New Document button, the application specified in the template type setting for that document library opens. After you enter the content for the new document, you can click Save to add the document to the library. When the Save dialog box appears, you do not need to change the location because STS has been granted special access to this folder.

Uploading an Existing Document

To upload an existing document to the document library, click the Upload Document button. In the dialog box that appears, select the file to be added to the library. You can also designate a status and an owner, and you can add comments for a document.

You can optionally link a document to specific tasks within a project plan. Click the Linked Tasks hyperlink to display a list of tasks for the project.

You can select the tasks to associate with a document by placing a checkmark in the Link? column for the desired tasks.

ADDING A HYPERLINK

You can add hyperlink addresses to Web sites or other documents. To add a hyperlink, click the Save a Link button and then enter the hyperlink address, as in Figure 18.

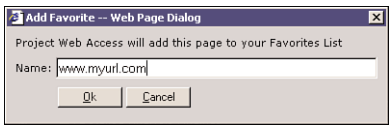


Figure 18
You can add hyperlinks to document libraries in STS.

SUBSCRIBE TO NOTIFICATIONS

Project Server is equipped with a new notifications engine that is designed to send email notifications for selected changes or events. You can click the Subscribe button to configure subscription options. These subscription options apply to the current user and affect all available subscription options. Of particular interest is the Or My Project Documents Change section, as shown in Figure 19.

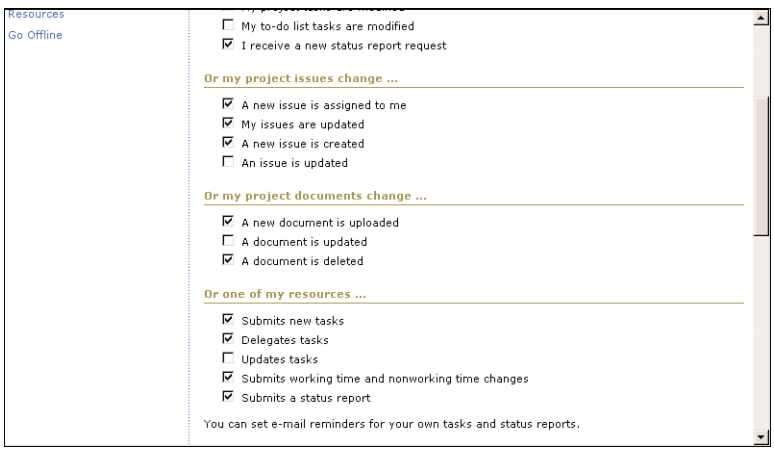


Figure 19
You can subscribe to receive notification of document changes in STS.

USING ISSUES TRACKING

Issues tracking helps to improve the project management process by providing a central forum to communicate on project-related issues. An issue can be associated with a project, a task, a document, or another issue. Project managers can create and edit issues as well as configure issues tracking options. Resources can read and edit issues, and all others are granted read-only permissions.

To access the issues page, select the Issues tab. A list of projects is displayed, along with a tally of associated issues (see Figure 20).

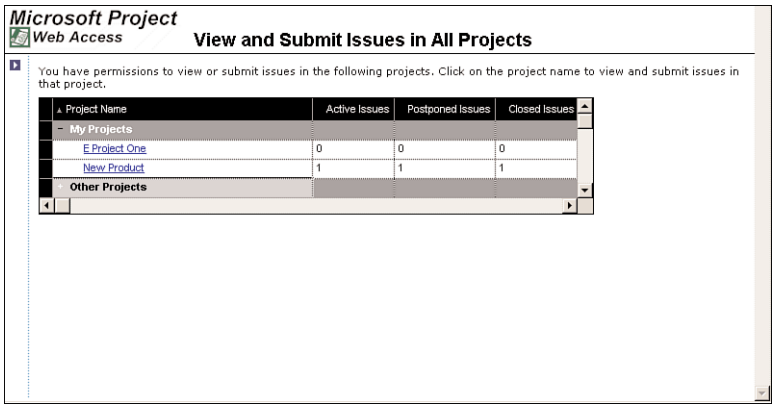


Figure 20
You can view the summary of project-related issues in STS.

To access a detailed list of issues for a project, click the hyperlink for that project. The page that appears provides a summary of all issues linked to the project plan. You can use the links in the sidepane to filter out certain issues.

Creating a New Issue

To create a new issue, you can click the New Issue button to display the View and Submit Issues dialog box, which is shown in Figure 21.

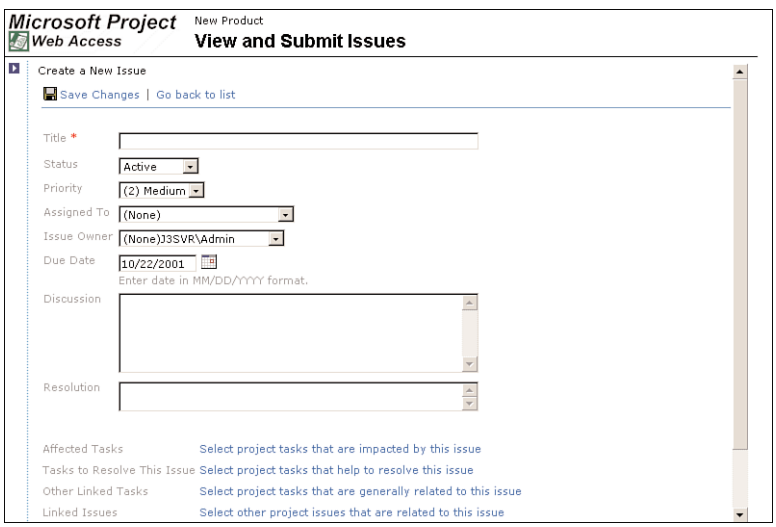
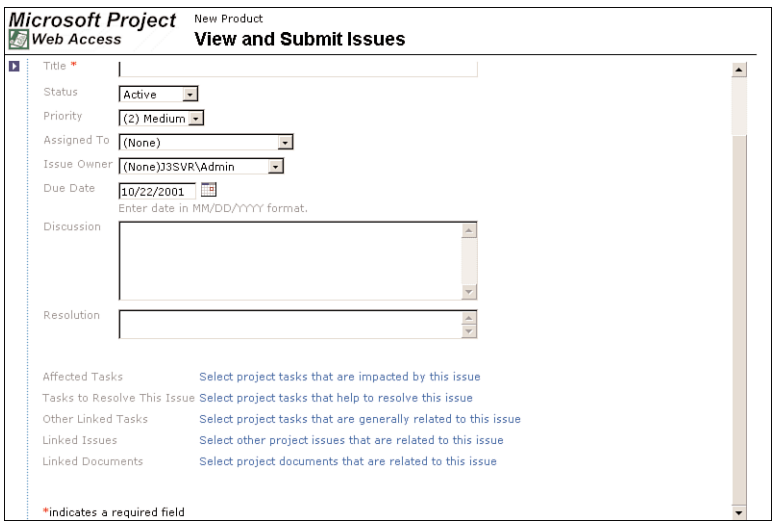


Figure 21
You can create a new issue.

In the View and Submit Issues dialog box, you can provide a title, status, priority, and due date for the new issue. You can optionally assign the issue to an individual and specify an issue owner. To begin the discussion of this issue immediately, add any appropriate comments to the Discussion and Resolution sections.

The lower portion of the View and Submit Issues dialog box enables you to link the issue with projects, tasks, documents, and other issues. Figure 22 shows the list of available items. To link an issue to another item, click the corresponding link to display the list of available items for that category.

Figure 22
You can link an issue to projects, tasks, or documents.



In this dialog box, select the items to associate with the issue by placing a checkmark in the Link? Column.

ISSUES SUBSCRIPTION OPTIONS

You maintain subscriptions options for issues tracking by using the View and Submit Issues dialog box.

IMPLEMENTING A DIGITAL DASHBOARD

As defined at Microsoft's Web site, a *digital dashboard* is "a flexible portal framework that integrates a corporation's diverse resources in a single browser-based interface." A digital dashboard gives the user the ability to view a variety of critical information on one screen, eliminating the need to look in multiple locations for this information (see Figure 23).

This section reviews a sample digital dashboard that allows the user to view key project information across the organization.

As you can see in Figure 23, the screen is divided into three separate areas: the Project Schedule Variance view, the Project Cost Variance view, and the Windows 2000 Deployment Status view.

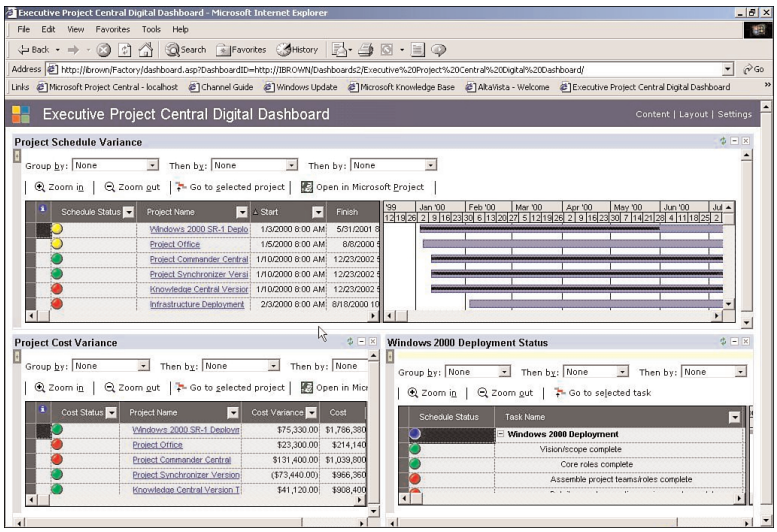


Figure 23
This executive digital dashboard shows three separate Project Central views.

In each view, notice that there is a Status field with a green, yellow, or red indicator. The indicator's color gives the status of that particular project or task. In this example, the project's Project Commander Central has a green indicator in the status field, which tells you that the project is on or ahead of schedule. A red indicator in the status field shows that the project has an unfavorable finish variance of greater than 5%. The true power of the digital dashboard lies in the organization's ability to define each of these indicators.

After seeing the digital dashboard, many people ask how the information in it is valuable to an organization. A view such as the Project Schedule Variance view allows you to quickly gain status information about some or all of the projects within an organization. The Windows 2000 Deployment Status view displays key tasks and milestones for a project. Finally, you can even include a Gantt Chart view within the digital dashboard, as shown in Figure 23. This view allows users to look at project data in a similar fashion to what Microsoft Project allows.

Microsoft Project Web Access gives you the ability to easily view a digital dashboard in Microsoft Outlook as well. To do so, follow these steps:

1. From the Web Access home page, click the Display a Dashboard in Microsoft Outlook link.
2. In the window that launches, first enter the URL to your digital dashboard.
3. Decide how you would like the dashboard to be displayed. You have three options: a Microsoft Outlook shortcut, the home page for an existing Outlook folder, and the home page for a new Outlook folder.
4. When you are finished making selections, click the OK button, and your dashboard view is created.

CUSTOMIZING MICROSOFT PROJECT WEB ACCESS

Microsoft Project 2002 provides a much greater ability to customize the look and feel of Microsoft Project Web Access than earlier versions of Project. Some of these features include tracking settings, home page appearance, and notifications and reminders. This section explores each option and what customization choices you have.

To customize Project Web Access, follow these steps:

1. Select Admin, Activities, Customize Microsoft Project Web Access. You are presented with all the options under Tracking Settings. The first group of choices, Specify the Default Method for Reporting Progress on Tasks, lets you choose how resources should report their time. The three options you have are to use the percentage complete, to use actual work completed and work remaining, and to use hours of work done per day or per period. Depending on how your organization tracks time, or would like to start tracking time, select the option that best suits your needs.
2. The second section, Lockdown Defaults, lets the administrator turn on or off the ability for a project manager to use a different time reporting method than the one specified earlier. If this option is turned off, the project manager is forced to use the method chosen by the administrator for his or her project.
3. The third section of this screen, Time Period Settings, allows you to specify what day the week starts on for timesheet purposes, as well as what interval of time to see. You have the option to view time on a weekly or monthly basis and also to define how many weeks or months to see at a time. In addition, you can specify how often a resource should update his or her timesheet, as well as the maximum number of hours that can be entered for one day.
4. Set how far in advance, by days, users can see future tasks. By default, it is set so that resources can see tasks that are past, current, or within 10 days in the future.

GANTT CHART FORMATS

Project Web Access lets you customize the look of Gantt charts by changing anything from the color of the bar to whether you even want it to be displayed. To modify the different Gantt charts, follow these steps:

1. Select Admin, Activities, Customize Microsoft Project Web Access. Then click Gantt Chart Formats under Customization Options. You are presented with a grid of all the types of Gantt chart bars associated with the current Gantt chart. (You can change the current Gantt chart by selecting one from the drop-down list.) By default, you will be looking at the bars across all Gantt charts.
2. The options you have allow you to change the format of how the bars will look when you are viewing them with data. First, in the Display column, you have the option of whether to display this bar. For example, if you did not want to show Summary Task Gantt bars, you could simply deselect the display box for that row.

3. The remaining options in this grid allow you to change the cosmetic features of a Gantt chart. The main thing to remember is that this section can be customized by an organization but does not have to be utilized in order to successfully deploy Project Web Access.

Grouping Formats

Similar to the way you can customize Gantt Chart formats, you also have the ability to customize the grouping format for the timesheet, as well as views. By making changes to these sections, you can make it easier for team members to distinguish specific tasks in their timesheet or tasks within a particular view. To modify the grouping formats, follow these steps:

1. Select Admin, Activities, Customize Microsoft Project Web Access. Then click Grouping Formats under Customization Options. You are presented with a grid of all the properties associated with the current grouping format. (You can change the current grouping format by selecting one from the drop-down list.) By default, you will be looking at the properties across all grouping formats.
2. The options you have allow you to change the format of how these levels will look when you are viewing them with data. First, in the Cell Color column, you have the option to change the color of that particular cell.
3. The remaining options in the grid allow you to change the cosmetic features of each of the levels in the timesheet and views, as well as define custom grouping formats. The main thing to remember is that this section, like the Gantt chart formatting, can be customized by an organization, but does not have to be utilized in order to successfully deploy Project Web Access.

Reporting Nonworking Time

In a resource's time sheet, in addition to the resources tasks, there is a section labeled Nonworking Time. In this section, the resource has the ability to enter time against non-project–specific tasks, such as vacation and sick leave. (By default, those are the two categories that are preconfigured when you install Project Server.) The administrator can add or delete as many of these nonworking time categories as needed. To accomplish this, follow these steps:

1. Select Admin, Activities in Admin, Customize Microsoft Project Web Access. Then click Customization Options, Reporting Nonworking Time. A list of all the nonworking time categories that have been defined by the organization appears. To add a new category, click the Insert Row button. A new row is added to the bottom of the list, and you have the ability to enter data into the Category field.
2. After you have named the category, you can define a code. This is simply a placeholder for your own reference. For example, if one of your categories is Sick Leave, and in your billing system sick leave has a code of 56, you can put that information here.

3. To delete a category, select the category and click the Delete Row button. To modify a category, click in the cell you would like to modify, and a cursor appears; you can then type changes at the cursor.
4. When you are finished, click the Save Changes button.

THE DEFAULT HOME PAGE APPEARANCE

As in Project Central, in Project Web Access you have the ability to add custom content and custom links to the home page. This is convenient because it allows you to make commonly used resources, such as an intranet or search engine, easily available when users log in to Project Web Access. In addition, you can put the content directly on the home page itself, and users can access the information without having to leave the page. To modify the home page, follow these steps:

1. Select Admin, Activities in Admin, Customize Microsoft Project Web Access. Then click Customization Options, Default Home Page Appearance.
2. The first section on this page is Add Links. When you add an item to this section, it appears on the home page as a hyperlink. To add a new link, click the Insert Row button. A new row is added to the bottom of the list, and you can enter data into the Link Name and URL field. For example, to add a link to the Project Assistants Web site, you would enter **Project Assistants** in the link name field and `http://www.projectassistants.com` in the URL field.
3. To delete a link, click on the link and click the Delete Row button. To modify a link, click in the cell you would like to modify, and a cursor appears; you can then type changes at the cursor.
4. The other section on this page, Add Content, is very similar to the Add Links section. The only difference is that you use this section to add actual content, rather than just a link, to the home page.
5. To add, delete, or modify content, follow the same steps you use to add a link. The only difference is the Height field, where you can specify how large you would like the frame that holds the content to be.
6. When you are finished, click the Save Changes button.

NOTIFICATIONS AND REMINDERS

The email reminder service scans the Microsoft Project Server database at the scheduled time each day and sends email messages to remind users about their upcoming or overdue tasks and status reports. The customization options in Project Web Access allow you to specify the mail server, email address, default company email address, and default message that users will receive. In addition, you can set what time the reminder service should run. Here's how you do it:

1. Select Admin, Activities in Admin, Customize Microsoft Project Web Access. Then click Customization Options, Notifications and Reminders. You are taken to the

Notifications and Reminders screen. The first field is your SMTP mail server and port. Enter the name and port of the mail server that you would like to use to send reminders.

2. The next two fields, From Address and Company Email Address, are for email addresses. The From Address field holds the address that the email reminder will be addressed from. The Company Email Address field holds an overall contact address for the organization (for example, `info@microsoft.com`).
3. In the Default Email Message field you can enter any text that you would like to include in the reminder email.
4. Under the Schedule Email Reminder Service heading, you can select when you would like the reminder service to run. To change this value, pull down the drop-down list and select a time.
5. When your settings are complete, click the Save Changes button.