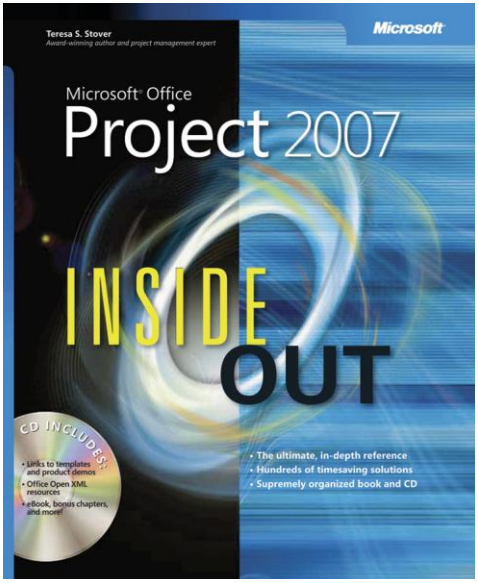

Microsoft® Office Project 2007 Inside Out

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CHAPTER 24

Making Executive Decisions Using Project Web Access

Executives and other managing stakeholders can use the enterprise features in Microsoft Office Project Web Access to monitor and measure projects and resources throughout the entire organization. They can see information about dozens of projects and thousands of resources, presented in a manner most relevant to their requirements.

When you are a managing stakeholder identified with executive-level permissions, you can log on to Office Project Web Access and see your entire portfolio of projects in one place, view all enterprise resource information, and arrange information in views or reports so that you can analyze, compare, and evaluate data.

You can compare one project against another, and look at overall resource allocation and availability throughout your organization. Your high-level views of the project portfolio and enterprise resources can be easily adapted and tailored to what you need to see for your particular focus, which can be quite different from what another managing stakeholder might need to see.

Because Microsoft Office Project Server 2007 is integrated with Microsoft Windows SharePoint Services, you have additional project collaboration and analysis information at your fingertips through workspace features that include discussion, calendars, risk management, issues tracking, and document control services.

Through all these, Project Web Access provides clear visibility into your organization's project efforts. You can access vital information that helps you prevent problems and ensure smooth operations. Through the Microsoft Office Project 2007 enterprise project management features, you can see the big project picture, use resources wisely, and make sound decisions for the future of your organization.

Project server administrators and portfolio managers should see Chapter 21, "Administering Your Enterprise Project Management Solution." Project managers can refer to Chapter 22, "Managing Enterprise Projects and Resources." Resources can find information designed for them in Chapter 23, "Participating on a Team Using Project Web Access."

Chapter 23, along with this chapter, are provided as stand-alone e-chapters on the Bonus Content tab of the Companion CD.

Getting Started with Project Web Access

Use your Web browser to connect to your organization's installation of Office Project Server 2007. You then log on to the server from Project Web Access by using the user identification established for you by the project server administrator.

After you're logged on, browse around to orient yourself to the layout of Project Web Access. This will give you some ideas of how you can use Project Web Access as a partner in your project analysis and decision-making.

Logging On and Off

To log on to Project Web Access, follow these steps:

1. Start Microsoft Internet Explorer (at least version 6.0).
2. In the Address box, enter the URL for your organization's project server and then click Go.

   The project server administrator provides you with the URL you need. Enter the URL exactly as provided, including any case sensitivity.

   If your project server administrator has set you up with a separate project server account, called a Forms account, the Project Web Access Sign In page appears (see Figure 24-1).

   Figure 24-1 If you are set up with a Forms account, you see the Sign In page whenever you start up Project Web Access.

   Enter your user name and password as provided by the project server administrator and then click Sign In. You might need to add or change your password after you log on the first time.

   If your project server administrator has set you up to use your Windows account, the Sign In page does not appear, and you connect to Project Web Access immediately after you enter the Web address.

   Your Project Web Access home page appears (see Figure 24-2).

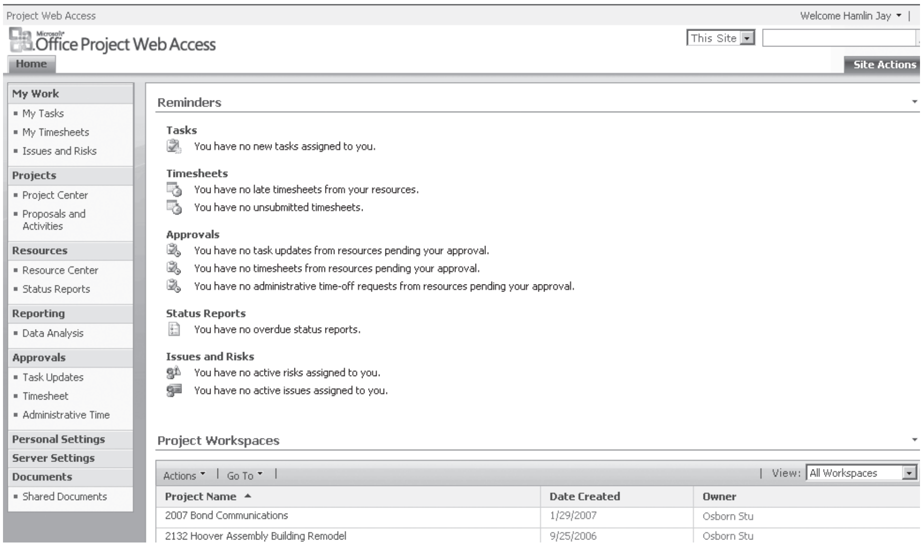


Figure 24-2 After a successful logon, the Project Web Access home page appears.

Create Shortcuts to Project Web Access

Because Project Web Access is your "command center" for project activities, consider adding it as a favorite Web site. When the Project Web Access Sign In page appears in Internet Explorer, click Favorites, Add To Favorites. Enter a name in the Name box and then click OK.

You might also consider adding a shortcut to Project Web Access on your Windows desktop. In Internet Explorer, click Favorites. Right-click the Project Web Access favorite you just created, point to Send To, and then click Desktop (Create Shortcut).

Note

If your project server administrator set you up with a separate project server Forms account, add a password the first time you log on to Project Web Access.

On the Quick Launch task bar, click Personal Settings. Click Change Password. Follow the instructions on the page that appears and then click Save.

When you are finished working with Project Web Access for the time being, it's important to log off. As a sponsor, customer, or other managing stakeholder, you have special executive permissions set up just for you in your Project Web Access user account. These permissions give you access to potentially sensitive or proprietary project information and documents, so it's important to practice your normal standards of corporate security.

To log off of Project Web Access, follow these steps:

1. In the upper-right corner of any Project Web Access window, click the Welcome button.
2. On the menu that appears, click Sign Out.

Finding Your Way Around

Browse around Project Web Access to get a feel for available features and how you might like to use them. You'll find Project Web Access similar to many Web sites, with information and links on multiple pages.

On the page that's currently displayed, review what's available. Remember to use your scroll bar as needed. Click around and orient yourself to the content and controls. If you have used Windows SharePoint Services or previous versions of Project Web Access, much of the site will seem familiar.

The Project Web Access home page and other major pages show the Quick Launch task bar on the left side of the screen (see Figure 24-3). The Quick Launch task bar includes a list of links to all the major areas and functions throughout Project Web Access, for example, the Project Center and the Resource Center. Simply click a link on the Quick Launch task bar, and the page changes to show the item you clicked.

Figure 24-3 The Quick Launch task bar is your navigation center, taking you to all the areas of Project Web Access.

You are likely to spend most of your visits to Project Web Access in one of three key areas, as follows:

- **The Project Center** The list of all projects for your organization are listed in the Project Center. You can arrange and review summary information for various combinations of projects. You can also click a project to see its component tasks or to open it in Microsoft Office Project Professional 2007.
- **The Resource Center** The list of all resources in your organization's resource pool are shown in the Resource Center. You can review summary information for different groupings of resources. If you want, you can also drill down to see detailed assignment and availability information for an individual resource.
- **Data Analysis** You can use the Data Analysis page to build, view, and save reports generated from an online analytical processing (OLAP) cube. Your project server administrator or portfolio manager might create the cubes (sets of up to six fields) that you can use to dynamically generate a PivotTable or PivotChart.

Viewing Project Portfolio Information

As you navigate from page to page throughout Project Web Access to examine project, task, resource, and assignment information, you work with a number of different views, tables, and fields. For example, on the Quick Launch task bar, click Projects, and the

Project Center view appears (see Figure 24-4). In this view is a table and probably also a Gantt chart, showing the portfolio of your enterprise projects.

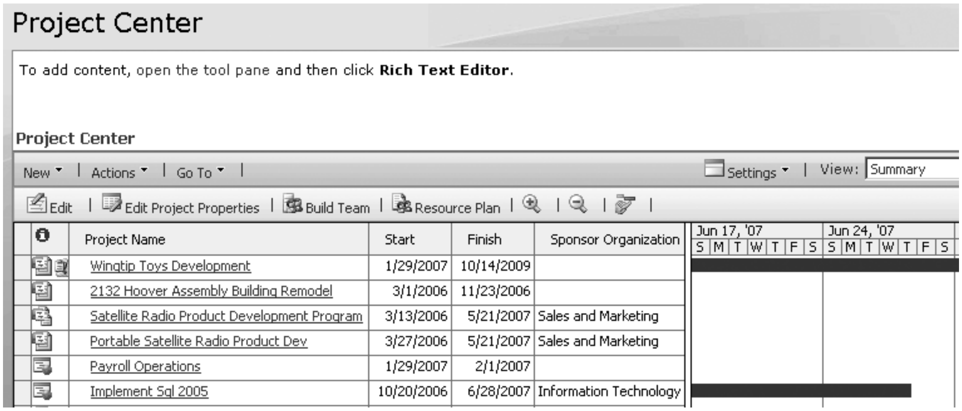


Figure 24-4 Go to the Project Center to review the list of enterprise projects.

The pages have certain controls to help you manage the information you want to see. Many pages give you choices for different views so that you can scrutinize different aspects of the information.

Certain commonly used pages—such as the Project Center and Resource Center—contain tables. There are certain techniques for working with those tables. Plus, those tables are made up of fields that you can also manipulate.

Working with Pages and Controls

The home page is the first Project Web Access page you see when you log on. By default, it includes a list of reminders, for example, issues or risks that require your attention. The home page also lists the Web workspaces for each of the enterprise projects. The project server administrator sets up your home page to include the content most appropriate for your organization.

All pages throughout Project Web Access have certain standard controls, as follows:

- **Welcome button** In the upper-right corner of every page is a button that says Welcome with your user name. Click this button to see a menu that includes My Settings, Sign In As Different User, Sign Out, and Personalize This Page.

Help

Home

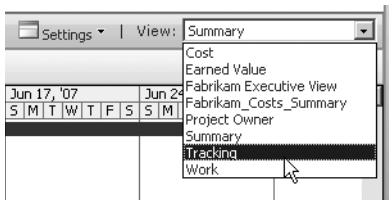
- **Help button** Next to the Welcome button is the Help button. If you ever need assistance while using Project Web Access, click the Help button. The Project Server Help window appears. A Help topic pertaining to the current page appears, but you can find other Help topics by typing a phrase or question in the Search For box or by clicking the Help button in the Help window and then browsing through the Contents.

- **Home** The Home tab is visible on every page. Click this tab to quickly move from an inside page on the Project Web Access site to the home page.

Most pages, such as the My Tasks page or the Project Center, have additional standard controls, as follows:

- **Settings** Click the Settings menu on the right side of the menu bar. On most pages, this menu includes View Options. This opens a pane that provides methods for you to control what you're seeing in the table, for example, a type of filter or a date range. On other pages, the Settings menus might also include commands to Filter, Group, and Search. Clicking one of these commands also opens a pane providing the necessary controls.

- **Select a view** Click the arrow in the View box to see a list of views. Views are different versions or layouts of content related to the current page. Some pages have just a single view, whereas others might have seven or eight views.



Working with Tables

Several pages throughout Project Web Access include a grid, or table, that lists information such as projects or resources (see Figure 24-5).

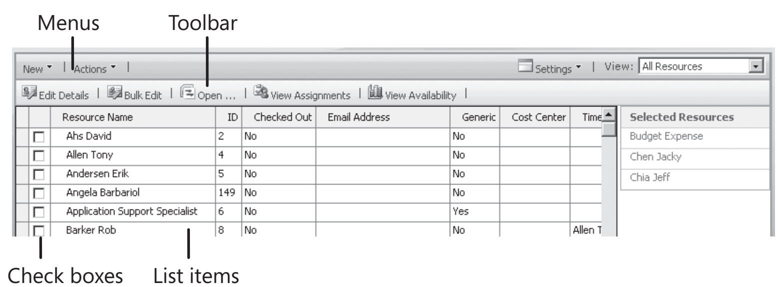


Figure 24-5 You use tables throughout Project Web Access to view and edit project-related information.

The following elements are present in most tables:

- **List items** The main feature of a table is the list of items. In most cases, you can click an item to drill down, for example, to edit task details or review project details.

- **Check boxes** Some tables include check boxes next to each listed item. Selecting the check box marks the item for further action, typically with a menu item. Items that are selected can be viewed to the right of the table.
- **Menus** Two or three menus are typically above a table, for example, New, Actions, and Go To. Click the menu name to view the drop-down menu of commands.
- **Toolbar** There are several buttons on a toolbar directly above the table. Typically, these buttons are for frequently used commands that are also available on a menu. For example, the Project Center page includes buttons for Edit Project Properties, Build Plan, and Scroll To Task.
- **Print the table** You can print the Project Center, Project Details, and Resource Center pages, among many others. Click Actions, Print Grid. A printable version of the table appears. Use the Print command in your Web browser to print the table.
- **Export the table to Excel** You can export tables to Microsoft Office Excel. On the page with the table, click Actions, Export Grid To Excel. The contents of the table appears in an Office Excel spreadsheet. Save the spreadsheet.

Understanding Fields

You can have either read-write or read-only access for the table fields in the view. Work with your project server administrator to make sure you have access to the fields you need in the views you use most often.

Certain types of custom fields might have been created and added to your views by the portfolio manager or project server administrator. Some of these custom fields can contain a value list from which users can choose an appropriate option. If such a custom field is part of a view that you are modifying, and if you have read-write permission, click in the field. A drop-down list shows all the choices. Click a choice, and that value now appears in the field. This makes it easy for you to enter the correct form of information while maintaining project data integrity.

Rearranging View Information

In many project and resource views, you can rearrange the order or information by sorting, grouping, or filtering information by criteria you choose.

Sorting Information

Sorting places information in alphabetical or numerical order, in either ascending or descending order. To sort items in a view by a particular field on a table, follow these steps:

1. In the table, click the heading of the field column you want to sort by.

   The field is sorted in either ascending or descending order.
2. To sort in the other direction, click the column heading a second time.

> **Note**
>
> Although not every table can be sorted like this, most of them can, including the tables on the Project Center, Project Details, and Resource Center pages.

Grouping Information

Grouping places information in categories relevant to the field you're grouping by. To group items by a particular field in a view, follow these steps:

1. In the view containing the table with fields you want to group, click Settings, Group.
2. In the group pane that appears below the menu bar, click the arrow in the Group By box to see your grouping choices in the drop-down list (see Figure 24-6).

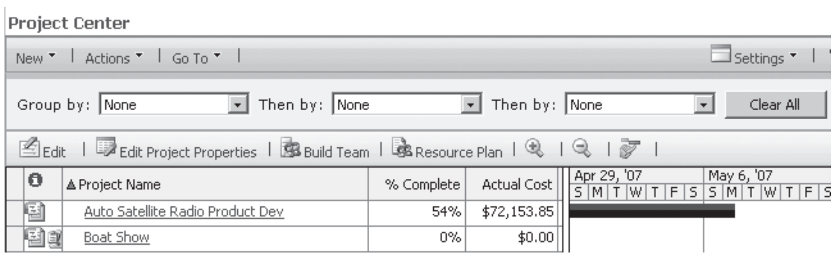


Figure 24-6 A pane with grouping controls appears when you click Settings, Group.

3. Click the field you want to group by.

   The task list changes to reflect your grouping.
4. If you want a subgroup within the group, click the second field in the Then By box.
5. When you want to return to the original nongrouped order, click None in the Group By box.

Filtering Information

Filtering removes information you don't want to view so that you see only the information that meets the conditions of the field(s) you are concerned with. To filter items by using a built-in filter in a view, follow these steps:

1. Display the view in which you want to filter information.
2. Click Settings, Filter.
3. In the filter pane that appears below the menu bar, click Custom Filter.
4. In the Define Custom Filter dialog box, click the field you want to filter by in the Field Name box, for example, % Complete or Finish (see Figure 24-7).

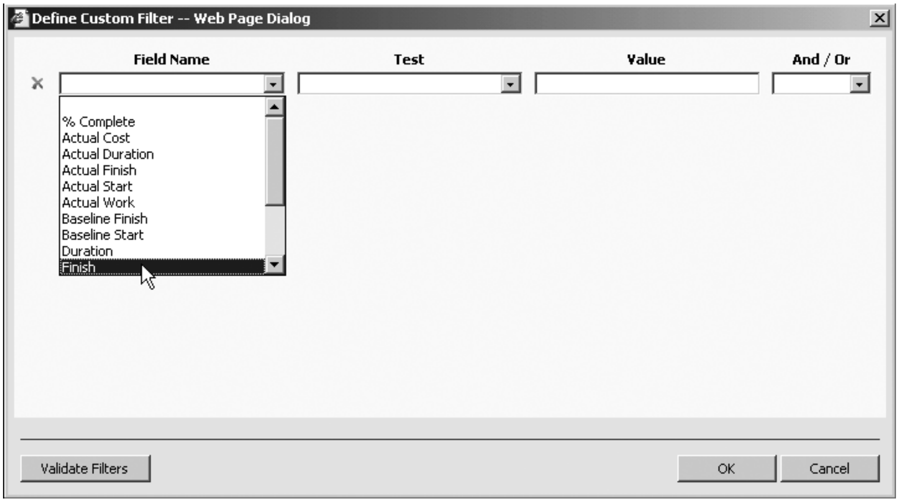


Figure 24-7 Use the Define Custom Filter dialog box to set up your filter for project information.

5. In the Test field, enter the test criteria, for example, Equals or Is Greater Than.
6. In the Value field, enter the value for the field and then click OK.

   The task list changes immediately to show only those tasks that meet your filter criteria.
7. To see all tasks again, click All Projects in the Filter box.

You can also select the AutoFilter check box to add the AutoFilter arrows to each column in the table. Click one of the arrows and then select a value by which to filter the list. To see all tasks again, click the AutoFilter arrow and then click (All).

To search for an assignment on your current page, click Settings, Search. Controls for search criteria appear in a pane.

To close the Filter, Group, or Search pane, click the X (close) button in the upper-left corner of the pane.

Working with the Project Portfolio

The Project Center is your hub of information for your project portfolio. This is where you can inspect the views of an individual project or analyze aspects of multiple projects to get the high-level picture of projects you need.

You can see the projects that are taking the bulk of your resources' time. This can help you determine whether you need to shift resource allocation and to ramp up or ramp down on hiring or the use of vendors.

You can use specialized views to look at overall costs of entire projects. You can combine projects in different ways to see those costs from various angles.

Most importantly, you can get that vital "view from 30,000 feet" into the collection of your organization's projects and gain insight into the key scope and activities of the organization. This can help you understand where your organization is now so that you can make strategic decisions about where you want it to go.

Viewing the Portfolio of Projects

You can see the summary list of all published enterprise projects and then drill down to examine the details of an individual project. To see the summary of enterprise projects, follow these steps:

1. On the Quick Launch task bar, click Project Center.

   The Project Center appears. The table lists all enterprise projects, with each project occupying a single row and showing summary data for that project in the table and in the Gantt Chart area.

   The Project Center also lists any published proposals and activity plans. These are discussed in the section titled "Creating Proposals and Activity Plans" later in this chapter.

2. Manipulate the Project Center table to see the information you want.

   In the View box, click the view that shows the best information. Different views can be created and added to the Project Center by the project server administrator or portfolio manager.

   You can also sort, filter, or group information to see it the way you need it. You can move the split bar between the table and chart to show more of one side or the other. Scroll through the table or chart. Compare values in a field of information among the various projects.

To see detailed information for any one of your enterprise projects, follow these steps:

1. In the Project Center, click the name of the project you want to review.

   The Project Details view appears, showing the component tasks of the selected project (see Figure 24-8)

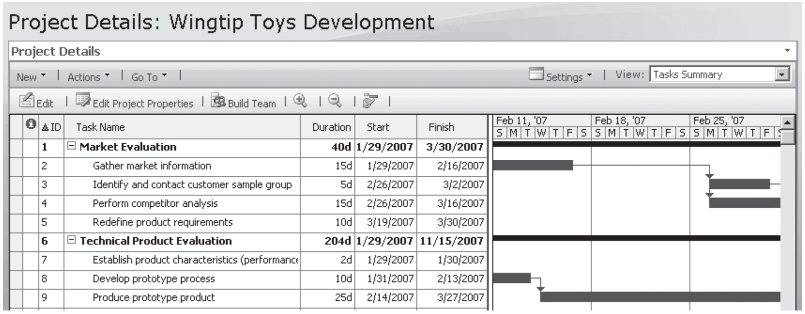


Figure 24-8 View individual project details.

2. Just as with the summary table, choose the view that shows the best information for your current purpose. Sort, filter, or group information. Scroll through the table or chart to find the information you're looking for. Compare values in a field of information among the various projects.

Analyze Projects by Using a Gantt Chart

Whether you're working on the Project Center page or the Project Details page, the default view contains a Gantt chart. In a Gantt chart, the left side of the view is a table, and the right side displays the Gantt bars showing the start, duration, and finish of each item (project, task, or assignment) across the timescale. The current date is shown as a dashed vertical line.

Zoom In

Zoom Out

You can click the Zoom In or Zoom Out buttons to see more or less detail in the time span shown in the chart area.

Opening a Project in Project Professional

Button Name

If you want to see the complete details for a project, you can open it in Office Project Professional 2007. On the Project Center page, click the Enterprise Project icon in the indicators column for the project you want to open in Project Professional 2007.

Depending on the logon method chosen by your project server administrator, you might need to enter your user name and password.

The selected project is now checked out to you and appears in Project Professional. You can view the project, resource, cost, and other information as needed. You can also make changes as your privileges allow.

For details about making changes to project information and publishing those changes to the project server, see the section titled "Managing Your Project Files on the Server" in Chapter 22.

INSIDE OUT Projects, programs, and portfolios

One enterprise project can be inserted into another to create a master project–subproject relationship between projects. Using this technique, in Project Web Access a program can be modeled to reflect projects being implemented under a specific program in your organization. The overarching program can be represented as the master project, with all the projects within that program set up as subprojects within the master project. Therefore, as established through Project Server 2007, a program is a set of related projects that are often set up in a hierarchical relationship.

For more information about modeling programs in PWA, see the section titled "Setting Up a Program of Projects" in Chapter 22.

By contrast, a portfolio is simply a collection of enterprise projects being implemented as well as those currently under consideration by an organization as reflected in the project server. They might or might not be related to one another, and they might or might not be set up in a hierarchical relationship.

Either way, all projects are listed on the Project Center page in Project Web Access, whether they are part of a program, and whether they are a master project or a subproject.

Reviewing Program Information

Portfolio managers or project managers can set up programs in the project server through the implementation of master projects and subprojects. This structure supports large organizations implementing several large projects and subprojects, often taking place at various locations around the world.

When you open a master project, all the subprojects are listed (and checked out) as tasks in any task view. You can then drill down by clicking one of the subprojects to see the tasks within that project.

Dependencies and deliverables between the projects within a program can be identified by the project managers, thereby providing the visibility needed to know when a key deliverable that affects related project is coming due.

Project Portfolio Server 2007

New in Office Project 2007 is the option to configure and implement Microsoft Office Project Portfolio Server 2007, which can provide additional portfolio management services as part of your integrated enterprise project management solution. Office Project Portfolio Server 2007 is a separate product that also includes the Microsoft Office Project Portfolio Web Access client. Project Portfolio Server 2007 includes sophisticated tools to help organizations identify, select, and manage portfolios compatible with their business strategy. It also provides tools for resource management, billing, and invoicing.

For more information about Project Portfolio Server, go to the Microsoft Office Project Portfolio Server page on Microsoft Office Online at *www.microsoft.com/office/portfolioserver*.

Project Workspaces and Documents, Issues, and Risks

Documents, issues, and risks can be added, tracked, linked with tasks, assigned responsibility, and eventually closed. They all become an important aspect of seeing the project through to a successful completion. They are also instrumental in capturing project archival information for use in planning future projects.

For details about creating and viewing documents, risks, and issues, see the section titled "Managing Documents, Risks, and Issues" in Chapter 22.

The lists of documents, issues, and risks associated with a project are maintained in the project workspace. Typically, all projects have a Windows SharePoint Services workspace created for them. In addition to the documents, issues, and risks, the workspace can include announcements among team members, a calendar of upcoming events, a list of deliverables between related projects, and team discussions.

To open the workspace for a project, select the project either on the Project Center or Project Details page and then click Go To, Project Workspace. The workspace opens in a separate browser window (see Figure 24-9).

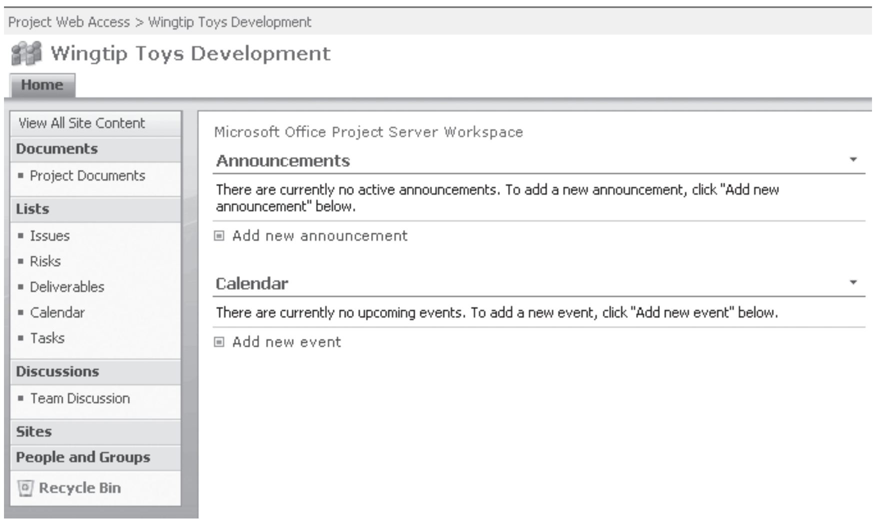


Figure 24-9 By default, as soon as a new enterprise project is published, a new workspace is created for it.

A project team can use the workspace for communication and collaboration as well as the repository for project documents. It is also essential for tracking project issues and risks.

Creating a New Project

In addition to reviewing and editing existing projects, you can create new projects. This can be helpful if you want to share new project ideas with your staff, or if you want to set up the vision of a program that portfolio managers and project managers can then implement.

To create a new project, click New, Project on the Project Center page. The Project Professional window appears with a blank project (see Figure 24-10).

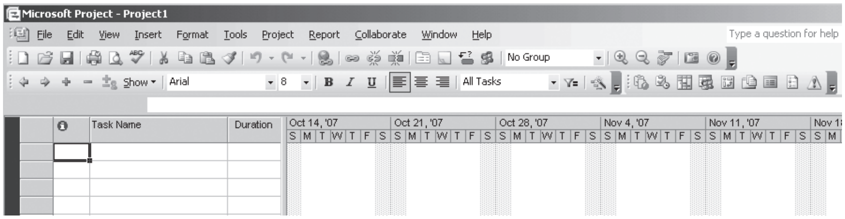


Figure 24-10 You can create a new enterprise project in Project Professional.

For more information about creating a new project, see the section titled "Creating a New Project Plan" in Chapter 3, "Starting a New Project." When you're ready to save, publish, and check in your new project, see the section titled "Managing Your Project Files on the Server" in Chapter 22.

Creating Proposals and Activity Plans

New in Microsoft Office Project Server 2007 is the means for using a simplified Web-based interface in Project Web Access to track activities throughout the entire project life cycle, that is, just before and just after the project itself is implemented.

With proposals, you can set up a preproject plan. This is useful if you have a vision for a new project with some high-level tasks, and you want to record these ideas without creating a new enterprise project. When the proposal is approved, it can be converted into a project.

Activity plans can best be used to track the routine operations that typically take place after the completion of a project. You can also use activity plans to track maintenance activities, very small projects, or your own personal to-do list.

> **Note**
>
> Proposals and activity plans all operate only in Project Web Access; there is no visibility to these plans in Project Professional. However, when they are published (rather than just saved), they do appear in the Project Center for all to see.

With both proposals and activity plans, you can use the views and reports in Project Web Access to do high-level or detailed analyses. This can be particularly useful with proposals. Portfolio managers and executives can review the proposals and evaluate feasibilities within the organization's strategic goals to help decide whether to move forward with a project.

Creating a Proposal or Activity Plan

To create a proposal or activity plan, follow these steps:

1. On the Quick Launch task bar in Project Web Access, under Projects, click Proposals And Activities.
2. To create a proposal, click New, Proposal.

   To create an activity plan, click New, Activity.

   The difference between the two is that the proposal might have a few more proposal-related fields than the activity plan (see Figure 24-11).

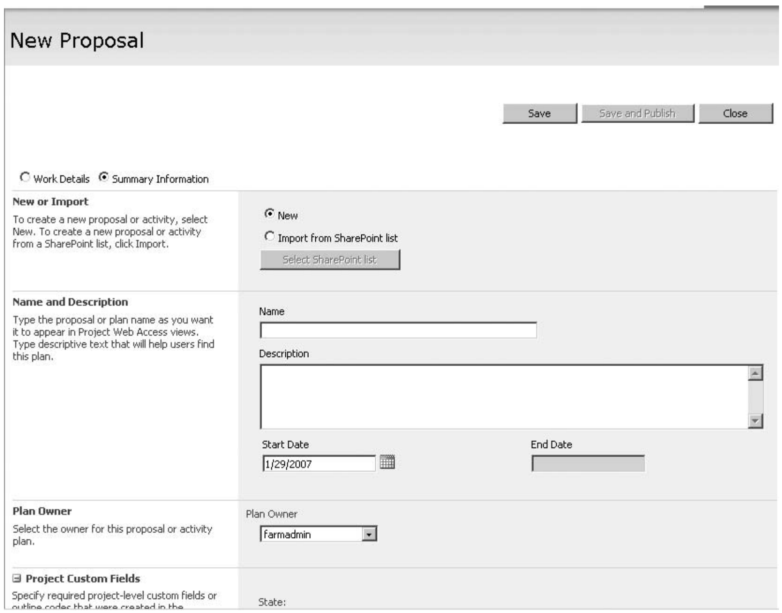


Figure 24-11 Start to create a proposal on the New Proposal page.

3. Near the top of the page, make sure that the Summary Information option is selected.
4. Work through the page, reading the section descriptions and completing the fields as appropriate.
5. If you're creating a proposal, and if the Workflow Status section is present, click the link to the workflow status and activity pages.

   The workflow status feature can be enabled or disabled as part of the customization done for your organization by your project server administrator.

6. If you're creating a proposal, under Project Custom Fields, click the button next to the State box and then click Proposed.

   The State field is a "built-in" custom field designed for use with proposals. The three enumerated states are Proposed, Approved, and Rejected.

Chapter 24

7. When finished, click Save.

   The new proposal or activity plan is saved to your project server, and the Work Details view of your new proposal or activity plan appears. Make sure that the Work Details option is now selected.

8. Enter the details of your new proposal or activity plan. Enter task names and durations. Use the buttons on the toolbar to indent outline levels or insert new tasks.

Link Tasks

9. If you want to link tasks with a finish-to-start task relationship, select the predecessor task by clicking the row header. Hold down Ctrl and then click the row header for the successor task. Click the Link Tasks button.

   An icon in the indicators field shows that the two tasks are linked. You can only link tasks with a finish-to-start task relationship in a proposal or activity plan.

10. Click Save to save the proposal or activity plan to the project server but keep it to yourself. Click Save And Publish to save the proposal or activity plan to the project server and also make it available for others to see and use.

    Unpublished proposals or activity plans are useful when you just need to keep a personal to-do list for yourself. Published proposals or activity plans are useful as a mini-project that you want to be able to share with other resources.

    Your new proposal or activity plan is listed on the Proposals And Activities page. If you published the proposal or activity plan, others will be able to open it. If you only saved the proposal or activity plan without publishing it, only you can see it in the list.

Viewing or Changing a Proposal or Activity Plan

To view, change summary information, or change task details about your proposal or activity plan, follow these steps:

1. On the Quick Launch task bar in Project Web Access, under Projects, click Proposals And Activities.

2. On the Proposals And Activities page, click the name of the proposal or activity plan you want to view or change.

   By default, the Work Details view of the proposal or activity plan appears.

3. Make any changes you want to the task information and then click Save.

4. If you need to view or change summary information, above the table, select the Summary Information option.

   The Summary Information view of the proposal or activity plan appears. In this view, you can review or change the description, the proposal state, and so on.

5. When finished, click Save or Save And Publish. Click Close.

On the Proposals And Activities page, proposals are the items that have a state associated with them: Proposed, Approved, or Rejected. Activity plans are also listed on this page, but their state fields are blank. You can select a proposal or activity plan without opening it by clicking anywhere in the row except on the name itself.

Adding Resources to a Proposal or Activity Plan

You can add resources to your proposal or activity plan and assign them to tasks. Resources assigned to tasks in proposals or activity plan are not really assigned; that is, they do not see notifications of new assignments, even if the proposal or activity plan is published. The purpose for doing this is to suggest possible resources in the event that this proposal or activity plan is approved and then converted to a project.

To add resources to your proposal or activity plan, follow these steps:

1. On the Quick Launch task bar in Project Web Access, under Projects, click Proposals And Activities.
2. On the Proposals And Activities page, click the name of the proposal or activity plan to open its Work Details view.
3. If you make any other changes to the proposal or activity plan, click Save.


Build Team

4. Click Build Team.
5. On the Build Team page, select the check boxes next to the resources you want to add to the proposal or activity plan and then click Add.
6. Click Save.
7. Click in the Resource Name field for a task, and you'll see a list of all the resources you just added. Click a resource to suggest the assignment of that resource to the current task. You can only add one resource to a task.
8. When finished, click Save or Save And Publish and then click Close.

Converting a Proposal or Activity Plan to a Project

If it is determined that the proposal or activity plan should become a project, you can easily convert it. To do this, follow these steps:

1. On the Quick Launch task bar in Project Web Access, under Projects, click Proposals And Activities.
2. On the Proposals And Activities page, click anywhere in the row except on the name to select the proposal or activity plan but not open it.


Convert

3. Click Convert.
4. Read the alert that appears and then click OK.

The proposal or activity plan is submitted to the project server queue for processing. When it's finished, the Proposals And Activities page appears, and your proposal or activity plan is no longer listed.

5. On the Quick Launch task bar, click Project Center.

   You'll see your former proposal or activity plan, which is now a project, listed there.

6. Click the name of your newly converted proposal or activity plan.

   You can now edit the proposal or activity plan, which is now a project, in Project Web Access or Project Professional. If you had already added resources, when you publish the project, those resources will see their assignments for this project.

Working with Resource Information

The Resource Center is the key location for executives and resource managers who need to keep a close eye on the performance of resources in the organization. In the Resource Center, you can review resource skills and other identifying attributes, their current assignments, their current or future workload allocation, and their current or future availability for additional work.

Viewing the Enterprise Resource Pool

You can see the entire enterprise resource pool and then examine details for an individual resource. To see the enterprise resource pool, follow these steps:

1. On the Quick Launch task bar, click Resource Center.

   The Resource Center appears, showing the enterprise resource pool. Each resource occupies a single row showing basic resource information in fields throughout the row (see Figure 24-12).

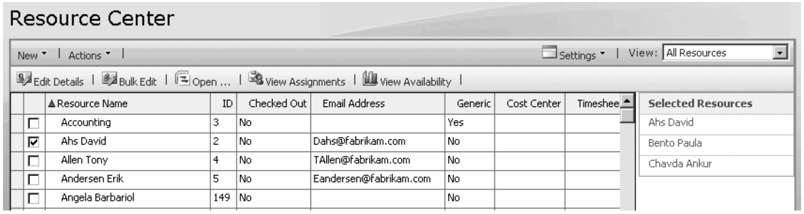


Figure 24-12 The Resource Center displays your enterprise resource pool.

2. Arrange the table to see the information you want.

   In the View box, click the view that shows the information you want. The project server administrator or portfolio manager can create and add different resource views to the Resource Center.

   You can also sort, filter, or group information to see it the way you need it. Scroll through the table to see more information.

To see detailed information for any enterprise resource, follow these steps:

1. In the Resource Center, select the check box next to the name of the resource for which you want to see details.

   If you want to see details for multiple resources one after another, select the check boxes for all of them. Their names appear in the Selected Resources pane on the right side of the page.

Edit Details

2. Click Edit Details.
3. Scroll through the Edit Resource page, which shows the resource's contact information, assignment attributes, and availability dates, as well as the contents of any custom fields that have been designed.

   By default, executive privileges do not include the ability to edit resource information. However, if you need that capability, talk with your project server administrator.
4. If you selected multiple resources, when you're finished with the first resource, click the Save And Continue button.

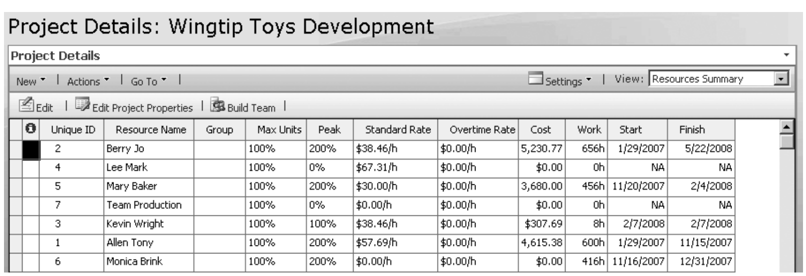
   The Edit Resource page for your second selected resource appears. Continue in this manner until you get to the last resource. On the page for the last resource, click Cancel.

   The Resource Center showing the enterprise resources appears again.

Viewing Resources for Specific Projects

To see the resources assigned to specific projects, use the Project Center, as follows:

1. In the Project Center, click the project name to open the Project Details page.
2. In the View list, click the Resource Summary view or other view that shows the resources that are working on this project (see Figure 24-13).



Unique ID	Resource Name	Group	Max Units	Peak	Standard Rate	Overtime Rate	Cost	Work	Start	Finish
2	Berry Jo		100%	200%	$38.46/h	$0.00/h	5,230.77	656h	1/29/2007	5/22/2008
4	Lee Mark		100%	0%	$67.31/h	$0.00/h	$0.00	0h	NA	NA
5	Mary Baker		100%	200%	$30.00/h	$0.00/h	3,680.00	456h	11/20/2007	2/4/2008
7	Team Production		100%	0%	$0.00/h	$0.00/h	$0.00	0h	NA	NA
3	Kevin Wright		100%	100%	$38.46/h	$0.00/h	$307.69	8h	2/7/2008	2/7/2008
1	Allen Tony		100%	200%	$57.69/h	$0.00/h	4,615.38	600h	1/29/2007	11/15/2007
6	Monica Brink		100%	200%	$0.00/h	$0.00/h	$0.00	416h	11/16/2007	12/31/2007

Figure 24-13 Apply a resource view to the Project Details page to see the resources on a specific project.

> **Note**
>
> If you want to see the resources assigned to specific projects, you can also open the project in Project Professional and then display the Resource Sheet.

Reviewing Resource Assignments

To review resource assignments, follow these steps:

1. In the Resource Center, select the check box next to the name of the resource whose assignments you want to see.

   If you want to see assignments for multiple resources at once, select the check boxes for all of them.

View Assignments

2. Click View Assignments.

   The Resource Assignments page appears (see Figure 24-14). In a Gantt chart format, the assignments for the selected resources are listed, grouped by resource name and then by project name.

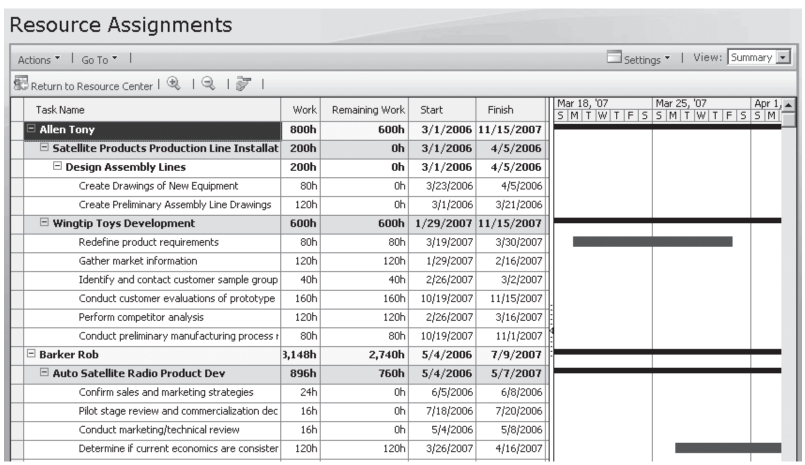


Figure 24-14 The assignments for the selected resources appear on the Resource Assignments page.

3. Scroll through the table and the chart to view the information you want.

Return To Resource Center

4. When finished, click Return To Resource Center.

Reviewing Resource Availability

To review resource availability, follow these steps:

1. In the Resource Center, select the check box next to the name of the resource whose availability you want to see.

   If you want to see availability for multiple resources, select the check boxes for all of them.

View Availability

2. Click View Availability.

   The Resource Availability page appears. The availability, as measured by work amounts over time, is drawn in a column chart for each selected resource (see Figure 24-15). Availability and capacity information are shown for each resource in a table below the chart.

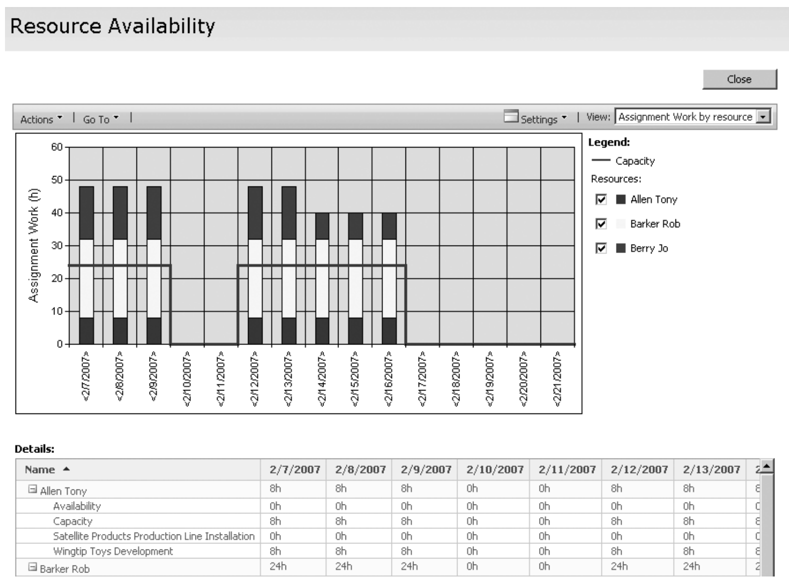


Figure 24-15 The assignments for the selected resources appear on the Resource Assignments page.

3. If you want to hide a resource's availability information, clear the check box next to the resource's name in the legend. Select the check box to show the availability information again.

4. Click the View box for other ways to see resource availability, including Assignment Work By Project, Remaining Availability, and Work.

5. When finished, click Close.

   The Resource Center appears again.

Reviewing Resource Plans

With a resource plan, project managers and resource managers can estimate potential resource requirements associated with proposals or activity plans. A resource plan can also define the general use of resources if they're being used as part of a small task-only project described by an activity plan. You can review resource plans if you want to see how resources are being used for other nonproject activities.

For more information about resource plans, see the section titled "Creating a Resource Plan" in Chapter 22.

> **Note**
>
> By default, executive privileges do not include the ability to create or edit resource plans. However, if you need that capability, talk with your project server administrator.

To see a resource plan, follow these steps:

1. On the Quick Launch task bar, under Projects, click Proposals And Activities.
2. On the Proposals And Activities page, click somewhere in the row of a proposal or activity plan to select it. Don't click its name, or the proposal or activity plan will open.
3. Click Resource Plan.

   
   Resource Plan

   The resource plan for the selected proposal or activity plan appears.
4. When finished, click Close.

Requesting and Responding to Status Reports

Suppose you want project managers or portfolio managers on your staff to submit narrative status reports to you every Monday morning so that you can be prepared with information for your Monday afternoon executive cabinet meeting. You can create and submit a status report format with the topics you need, for example, "Major Accomplishments," "Upcoming Milestones," and "Potential Problems."

In their home page Reminders section, your staff members are notified to submit their status reports on time. Their responses are compiled into a single report that you can then print or export to a Microsoft Office Word document.

Requesting a Status Report

To set up a narrative status report format, follow these steps:

1. In Project Web Access, under Resources, click Status Reports.
2. Under Requests, click New, New Request.

   The Status Report Request page appears (see Figure 24-16).

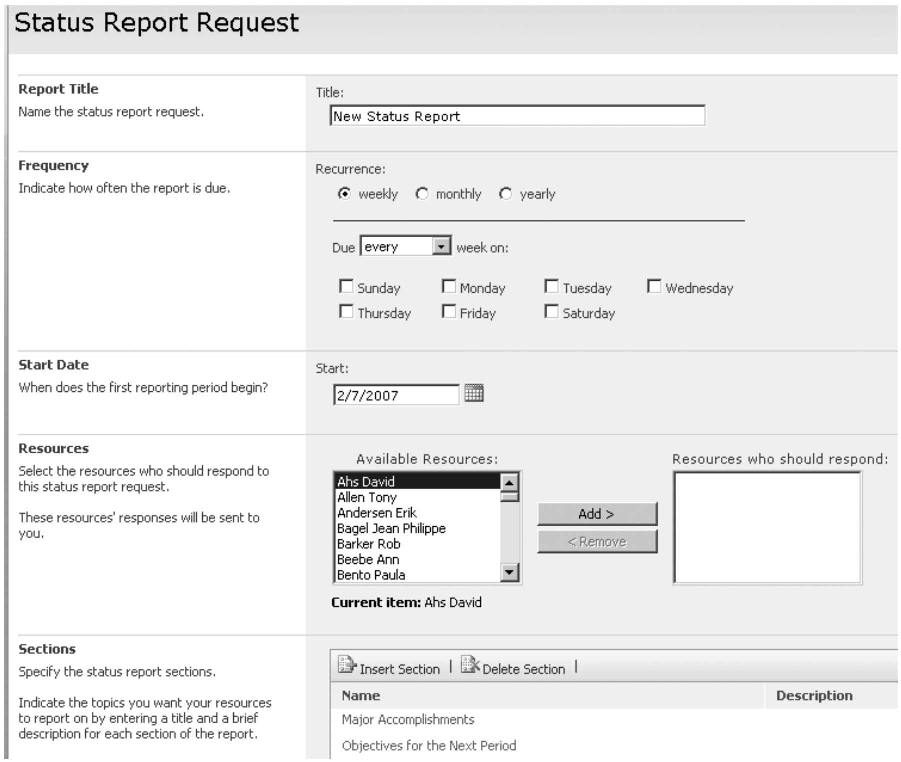


Figure 24-16 Use the Status Report Request page to design a narrative periodic status report.

3. Work through the page to specify the design and frequency of your status report.
4. In the Resources area, select the individuals who are to receive this status report request and who will be responsible for submitting the status reports.
5. In the Sections area, specify the headings under which your resources will report. To add a new heading, click Insert Section. A new row opens up. Click in the row and type the heading you want. To remove a heading, click it and then click Delete Section.

   Insert Section

   Delete Section
6. When finished, click Send.

The status report request, details and schedule are submitted to the selected resources. They will see reminders on their home page about status reports coming due. Their Status Reports page will present the name of the status report.

When it's time for your resources to submit status reports, they'll click the name of your status report and complete the page. The page includes a box for each of the sections you identified in your request (see Figure 24-17).

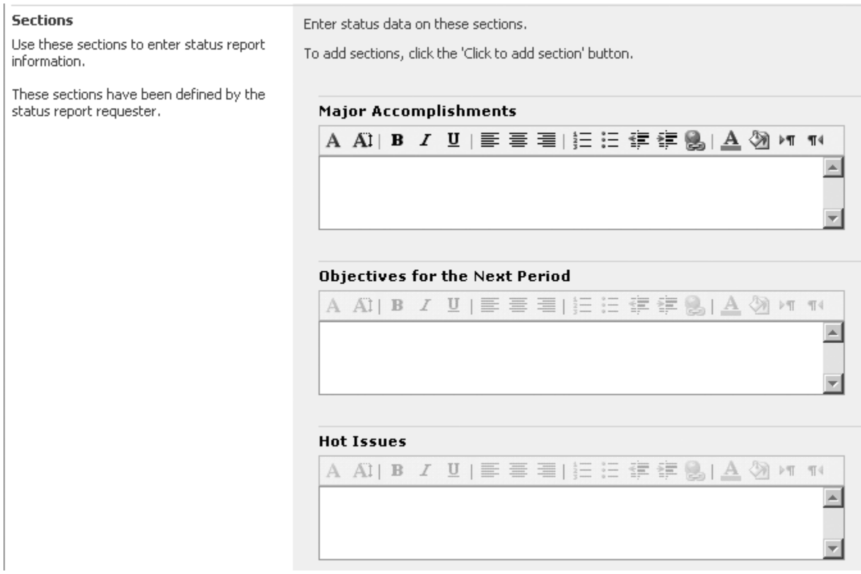


Figure 24-17 A box appears for each status report section you specified in your request.

Resources can add extra sections and send unrequested status reports outside the normal schedule if they want.

You request the status report only once—when you first set it up with a specified time period and frequency. Resources see automated reminders on their Project Web Access home page whenever a status report is coming due.

Reviewing the Compiled Status Report

The project server automatically merges the status reports from all resources for a given time period. To review the combined status reports, follow these steps:

1. In Project Web Access, under Resources, click Status Reports.
2. Under Requests, click the name of the status report whose responses you want to review.

   The View Responses page appears.
3. To specify the time period of status reports you want to see, set the dates in the View Status Reports From boxes and then click Apply.

4. Under Group Merged Reports By, select whether you want the merged report to be grouped by resource name or response date.

Open

5. Click the Open button.

   The merged status report appears. The responses from each resource are grouped under the section headings you identified.

Export To Word

6. If you want to include the status report in an Microsoft Office Word document for printing or for inclusion in a project status report, click Export To Word.
7. Click Yes in the ActiveX control alert that appears.

   The report is formatted and exported to Word. You can save it or print it from there.

Responding to a Status Report Request

Just as you might need members of your staff to submit status reports to you, you might need to submit a status report periodically to your manager. During the designated time periods, you write your status reports and submit them to the project server. When everyone's status reports are in, your manager can review the compiled status report.

After your manager first sets up the status report, you'll see an automated reminder notification on your Project Web Access home page whenever a status report is coming due.

To create and submit your status report, follow these steps:

1. On the Quick Launch task bar, under Resources, click Status Reports.

   The Status Reports page appears, showing a table of status reports for different projects (see Figure 24-18).

Figure 24-18 The table on the Status Reports page shows all your different status report requests, which manager receives them, and when the next one is due.

2. In the table, click the name of the status report you want to write.

   The Status Report Response page appears.

3. Change fields in the To and Period sections if needed.
4. In the Sections area, type your status report in the boxes provided.

   The headings of the boxes reflect the topics that your manager wants all resources to report on for each status report.

5. If you want to add another section of information, click the Click To Add Section button. Type a title for the section and then click OK. In the new box, enter your additional information.

6. If you just want to save your report and update the project server later, click Save.

   Clicking Save is useful if you're not quite finished with your status report, or if it's not time to submit the report yet. It's a good idea to enter status information whenever you have a significant accomplishment or encounter a possible blocking problem. Then when the status report comes due, you'll have most of your information in place already.

7. When you're ready to submit your status report to the project server and your manager, click Send.

   Your status report is submitted to the project server. The project server automatically merges your status report with those from the other resources for the same time period.

Submit Unrequested Report

You can also send a status report that's separate from the normal status report format or to a different resource. You can specify your own status report title, the resources who should receive the status report, and which sections it should contain. To do this, on the Status Reports page, click Submit Unrequested Report. Complete the fields on the Unrequested Status Report page. In the Sections area, click the Click To Add Section button. Type a title for the section and then click OK. In the new box, enter your additional information.

Analyzing and Reporting on Project Information

One of the primary capabilities of the Project Server enterprise features is that it can show information about all projects, tasks, resources, and assignments in the entire enterprise. Although it's great to have all this data available, it's not practical to review the details of every project throughout the organization. However, it's highly advantageous to see a high-level summary of project schedules, costs, and resource utilization. It's also helpful to be able to roll information from multiple projects together and to make comparisons between them.

Using the Data Analysis services available in Project Server, you can analyze schedule performance or resource utilization for a single project, multiple projects, or even all projects in the enterprise portfolio. Such analysis can provide a wealth of usable information, from whether you're spending too much on material and equipment costs to whether it would make good business sense to follow through on your proposal for a new ambitious project.

Data Analysis dynamically generates reports in Project Web Access that provide summary or detailed project information necessary for a single project or any collection of projects.

Data Analysis is implemented through the use of online analytical processing (OLAP) tools provided by SQL Server Analysis Services and the Cube Building Services in conjunction with Project Server and Project Web Access.

Typically, the project server administrator or portfolio manager first configures the Data Analysis Services and creates the OLAP cubes, or dynamic reports, available to you and other users in the form of a spreadsheet (PivotTable) or column chart (PivotChart). These views are added to the View list of the Data Analysis page for you to select and manipulate. You can add, move, or delete fields in the resulting PivotTable or PivotChart.

For more information about how the OLAP cubes are built by the project server administrator, see the section titled "Setting Up Project Report Cubes for Data Analysis" in Chapter 21.

When you want to see a PivotTable or PivotChart that analyzes various aspects of current enterprise project, resource, or portfolio data, follow these steps:

1. On the Quick Launch task bar, click Data Analysis.

   Data Analysis

   If you're working in Project Professional, you can open the Data Analysis page from there. Click Collaborate, Data Analysis. Or, on the Collaborate toolbar, click Data Analysis. The Project Web Access Data Analysis Updates page appears in your Project Professional workspace.

2. In the View box, click the view you want to use.

   Show Field List

3. To change the fields used in the view, click Show Field List. Drag the fields you want from the list onto the appropriate areas of the view, as follows:
   - Drag a field you want for a PivotTable column into the area labeled Drop Filter Fields here.
   - Drag a field you want for a PivotTable row into the area labeled Drop Row Fields Here.
   - Drag a field you want for the Y-axis on a PivotChart to the area labeled Drop Filter Fields Here.
   - Drag a field you want for the X-axis on a PivotChart to the area labeled Drop Category Fields Here.

The following are more methods for manipulating how you view the information in your PivotTable or PivotChart:

Expand

Collapse

Save

- Click Expand to increase the level of detail in the view.
- Click Collapse to decrease the level of detail in the view.
- Click Save PivotTable As Image to save the PivotTable as a GIF graphics image for use elsewhere, for example, in a Word report document.
- Click Save PivotChart As Image to save the PivotChart as a GIF graphics image for use elsewhere, for example, in a Microsoft Office PowerPoint presentation.

Get more options for manipulating your view with the PivotTable toolbar. Click Settings, View Options. In the pane that appears, select the Show PivotTable Toolbar. The PivotTable toolbar appears.

Help

For more information about working with PivotTables and PivotCharts, click the Help button on the PivotTable toolbar. Categories of topics include "Getting Started," "Using PivotTable List Tools," "Adding and Removing Fields," and "Filtering Data."

Work with your project server administrator or portfolio manager to learn how best to use the OLAP cubes that have been set up. Also let them know if you need different cubes designed that will help you analyze project and portfolio information in the way you need.

Setting Your Alerts and Reminders

Project Web Access provides tools to add a layer of efficiency to your project activities. You can set up automated notifications so that you can receive e-mail and see reminders about approvals, status reports, issues, and risks.

To configure automated e-mail alerts and Project Web Access home page reminders to yourself, follow these steps:

1. On the Quick Launch task bar, click Personal Settings.
2. Click Manage My Alerts And Reminders.
3. Review the options in the Tasks and Status Reports sections. Select the check boxes and make further specifications for the events for which you want to be notified via e-mail (Task Alerts) and see reminders on the Project Web Access home page (Task Reminders).

   Clear the check boxes for events for which you do not want an e-mail notification or reminder.

   You can set up notification and reminder options for upcoming tasks, status reports, and more.
4. When finished, click Save.