

3

CHAPTER

New Features and Some That Have Been Retired

The previous version of Project Server (Project Server 2003) was a solid solution for organizations looking for an Enterprise Project Management (EPM) toolset. It was flexible and was usually a good choice, especially when put in context of the costs of its competition. Microsoft Office Project Server 2007 is a major leap forward from the feature and function perspective. There are a host of new features and improvements. There are also a small number of features that are no longer available. This chapter covers both.

The New Windows SharePoint Services-Based User Interface (UI)

This is not a SharePoint book. The Windows SharePoint Services (WSS) 3.0 platform that the Microsoft Office Project Server 2007 uses to provide the Project Web Access (PWA) user interface, however, provides a wealth of possibilities for powerful organizational and project team collaboration. No discussion of Project Server is complete without including SharePoint. There is an entire chapter later in this book discussing ways to get the most out of WSS in a project-focused environment. This section is just a high-level overview of WSS tools that are available in PWA as well as team-focused Project Workspaces that make up part of the EPM 2007 solution.

A Single Interface

One feature that has been available enables the user to manage each project in Project Server and to create a collaboration site automatically when a new project is published. These sites make a fantastic virtual space where the team can work together. In the 2003 version, PWA was an Active Server Pages (ASP) application, and Microsoft WSS 2003 was a .NET/ASPX application. Both offered distinct user interfaces. WSS 3.0 has a better look and feel than its predecessor and is more securable, easier to navigate, and easier to manage. Even a stand-alone WSS 3.0 system improves the look and feel of the interface and is easier to understand and to navigate than in previous versions. The fact that it is the basis not just for the Project Workspaces but for the entire environment makes this system much easier to use.

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Web Parts as Part of the PWA Environment

Web Parts are discreet page components that each performs a separate function. This is a common feature in portals and collaboration environments. In other technologies, they may be called things like modules or portlets. For example, if you are on MSN.com, MSN Shopping and MSNBC News areas function like Web Parts. Web Parts can be mixed and matched to create a customized PWA that fits specific organizational needs. In Figure 3-1, you will see that the PWA (default) Home Page has areas for navigation and a page body that contains Web Parts for Reminders and Project Workspaces. You can add other Web Parts, change their respective positions, or remove them altogether. You could add a Web Part that displays information from different systems and location, even outside your company's walls. Keep in mind that this means that data from virtually any source can be part of your project environment. Even the standard Reminders section on the PWA Home Page is a Web Part. It appears in Figure 3-1 with the Project Workspaces Web Part underneath it.

The screenshot shows the Microsoft Office Project Web Access (PWA) Home Page. The browser window title is "Home - Project Web Access - Microsoft Internet Explorer". The address bar shows "http://project2k7moss/PWA/default.aspx". The page content is organized into a sidebar and a main content area.

Reminders Web Part:

- Tasks:** You have no new tasks assigned to you.
- Timesheets:** You are the timesheet manager for resources with 3 unsubmitted timesheets in periods ending prior to 2/10/2007. You have 3 unsubmitted timesheets.
- Approvals:** You have no task updates from resources pending your approval. You have no timesheets from resources pending your approval. You have no administrative time-off requests from resources pending your approval.
- Status Reports:** You have no overdue status reports.
- Issues and Risks:** You have no active risks assigned to you. You have no active issues assigned to you.

Project Workspaces Web Part:

Project Name	Date Created	Owner
1 Exabyte Desktop Drive_Published	11/7/2006	Steve Masters
100X DVD Drive_Published	11/7/2006	Steve Masters
200GB USB v2 External Hard Drive_Published	11/7/2006	Steve Masters
Data Center_Published	11/7/2006	Chris Preston

FIGURE 3-1 Reminders Web Part

UI Customization

Although customization of the look and feel was possible in the 2003 version, it was not easy or generally advisable. Customizing the UI is much easier today using a combination of templates and tools. From the time versus value perspective, this does not mean that it makes sense to make massive UI changes, but you do have greater flexibility if you so choose.

Lists

Lists are one of the great features of SharePoint. Lists are used for risks and issues out of the box, but also can be used for many other functions. Because of the divergent technologies used in the 2003 version between the project-focused PWA (Active Server Pages) and the .NET-based WSS 2003, certain views that combined areas of both tools were a bit awkward. SharePoint lists now appear directly in PWA seamlessly. Besides integration with risks, issues, and documents that were available in the 2003 version, project contacts, presence, announcements, and other functions were and continue to be available out of the box. We will discuss the new Deliverables List later in this chapter. Far deeper use is possible and will be discussed in Chapter 25. Lists items now have Version History, a new feature in the 2007 version.

Deliverables

A deliverable is a product or item that is created as part of work on a project. Deliverables is a new type of list available in the Project Workspaces that can be provisioned for each project. Deliverables have a name as well as start and finish dates and can include file attachments. As a stand-alone list, deliverables have some minimal value, but when they are actually associated with a specific project task or milestone, then there is a substantial value to be reaped for improving project management processes. Project managers can create loosely coupled cross project dependencies through the use of Deliverables. See Figure 3-2 for Deliverable item creation.

Recycle Bin

In WSS 2003, one of the greatest annoyances occurred when a user deleted and then wanted to “undelete” an item from a SharePoint list or library. A single deletion of a document (select delete and then answer affirmatively to a confirmation dialog box), for example, would delete the document and all of its Version History. The only practical way to restore it without the use of third-party tools was to recover the entire system database to another environment and grab the deleted document for a manual reposting. If you have ever had to do this, it likely wasn’t one of your favorite ways to spend your time.

WSS 2007 offers a two-stage Recycle Bin that supports recovering deleted items. The Recycle Bin appears for any user who has the Delete permission. In Figure 3-3, you can see how the Recycle Bin appears in a document library. If users delete an item, they can open the Recycle Bin and restore it. Even if they delete the item from the Recycle Bin, the WSS Site Collection Administrator can restore it. Restores from the Recycle Bin are “full-fidelity,” meaning that the document and all the history are restored.

Recycle Bins can be configured to delete content after a certain period of time, reducing administrative time for cleanup.

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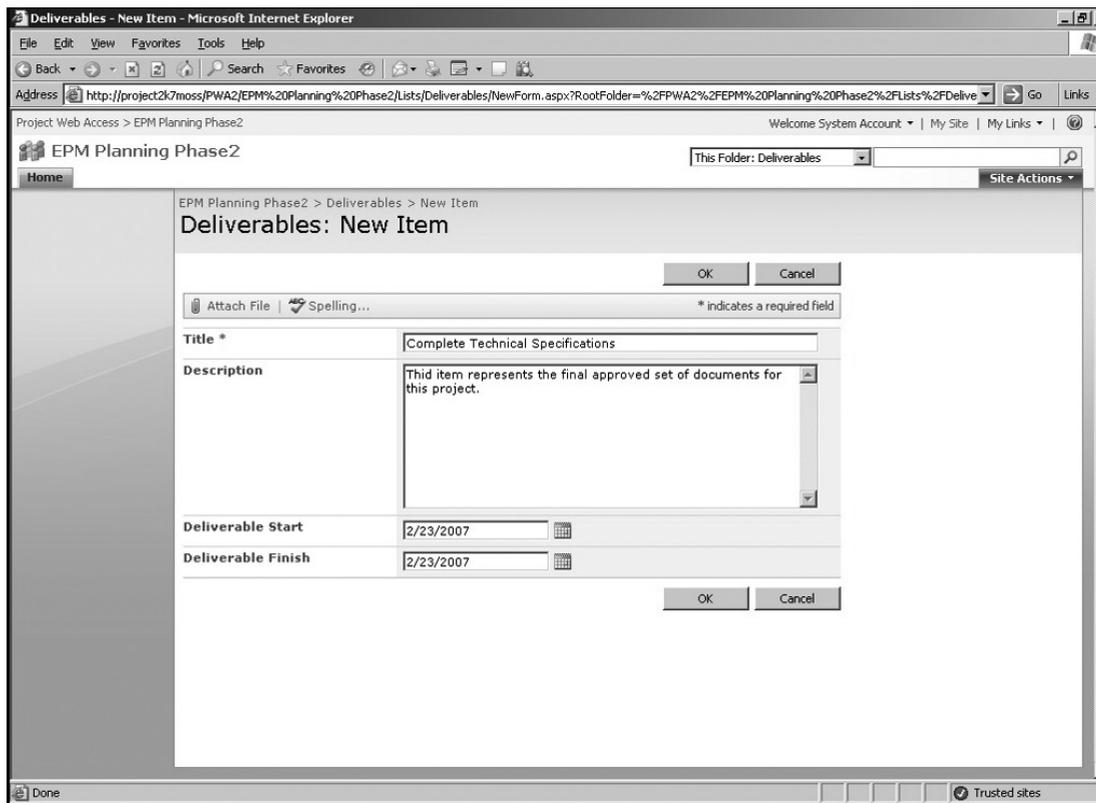


FIGURE 3-2 A deliverable

Security Trimmed User Interface

In some cases, applications will display links or buttons that, while active, take the user to “dead-ends.” In WSS 2003, it was possible to select a button or link and then be rejected for permission reasons. The actual process when this occurred was fairly painful, although probably not worth describing in detail here (if you have ever experienced this process, you are already very aware of how painful it was). In WSS 2007, there is a major improvement over earlier versions of SharePoint in this area. In this version, if you don’t have permission to see or do something, it will not appear at all, nor will links appear that take you to pages or items for which you have no access. This helps users avoid a significant headache and is better security practice as well.

Document Libraries and Document Management

Document libraries are a special type of list. They store documents, their history, and metadata (data about data) about the documents. In a Project Server environment, document libraries are used for project-related collateral such as Project Plan documents (such as Project Charter, Requirements, and Communications Plan). This capability was available in the 2003 version, but has been extended in several ways.

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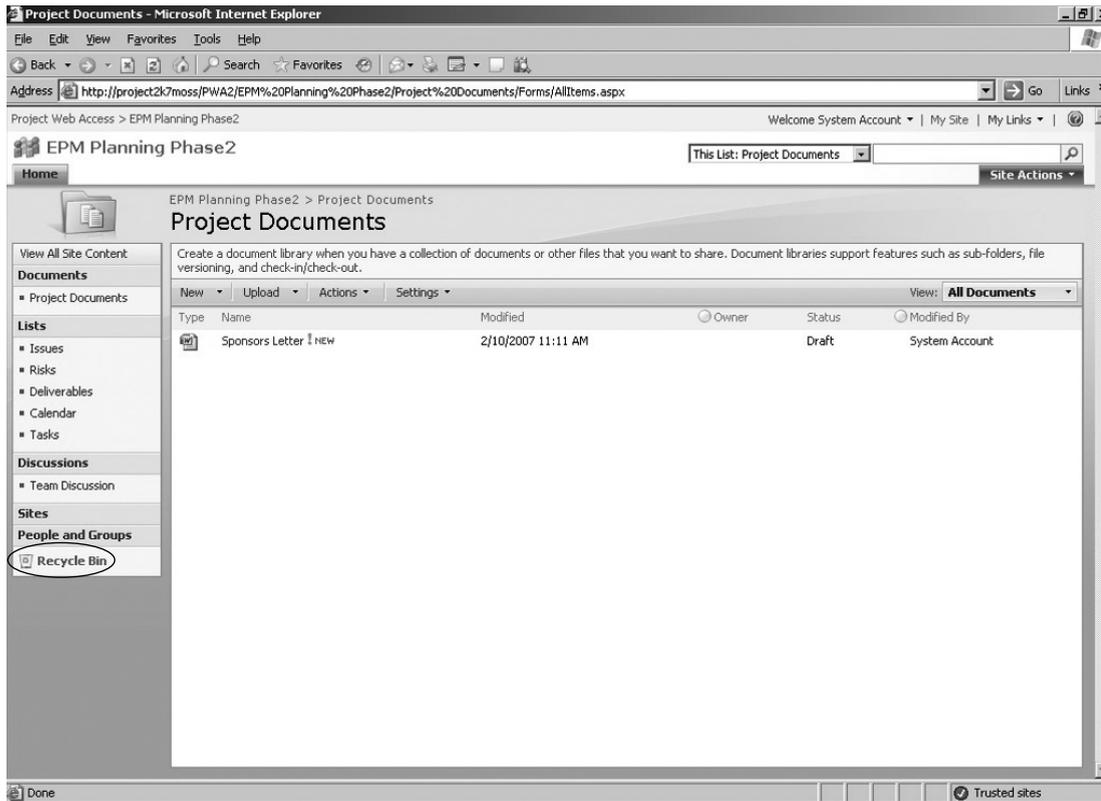


FIGURE 3-3 Document library with Recycle Bin

Document Management

The document management capability has been strengthened considerably. Included now is the ability to force check-out for editing. In the 2003 version, it was possible to select a document without using the check-out feature, make edits, and save the document back to its location without a check-in process or version number update. It is now possible to require that a document be checked out to edit it and if changes are made it must be checked back in before the edits are available to others.

In addition to improving the check-in/check-out process, WSS 3.0 has an option for Major and Minor (v1.1, 1.2, 1.3, 2.0, etc.) version numbers as opposed to the previous version, which supported only Major (1.0, 2.0, 3.0) version numbering. Minor versions can be secured from general viewing. For example, if a draft may undergo editing prior to final approval before the document is promoted to the next Major version number for a larger audience to view.

WSS presents Version History in a very usable manner, as shown in Figure 3-4.

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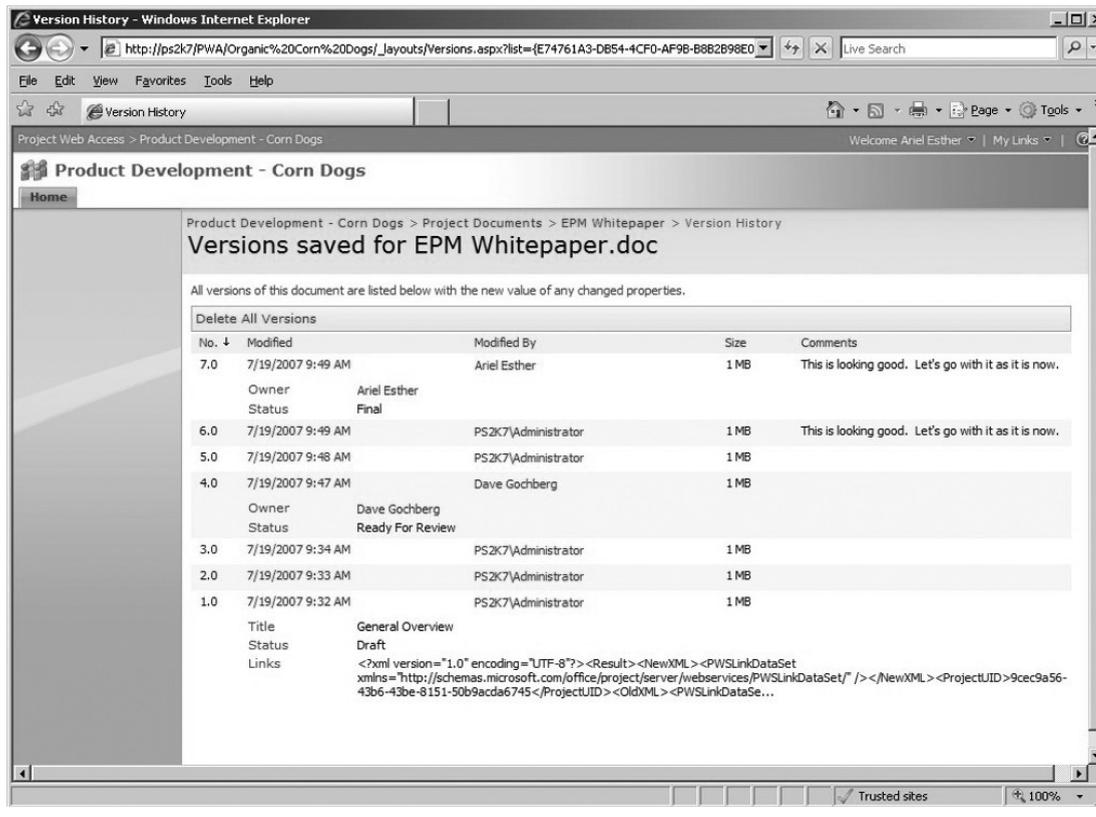


FIGURE 3-4 WSS Version History page

Bread Crumbs

As in *Hansel and Gretel*, a bread crumb is something that is left along the way to form a trail to follow your path back from where you came. On Web pages, birds don't eat the bread crumbs. They are often displayed through the use of a horizontally displayed set of links that enable users to see where they are in a site's hierarchy and a path to navigate back either all the way or part of the way through the use of links. WSS 3.0 provides this functionality as shown in Figure 3-5.

Alerts

Alerts allow individual users to be notified as they prefer for either the contents of an entire list or library or an individual item. For example, a project sponsor can set an alert for any new content in a custom-created Change Request library. Previous alert functions remain. New alerts are possible for search string results. For example, if you perform a search on issues and a certain resource, you can set an alert that tells you that the results of your string would yield a different result. The user has control over whether to be alerted to new items, changed items or both and can choose daily or weekly summaries.

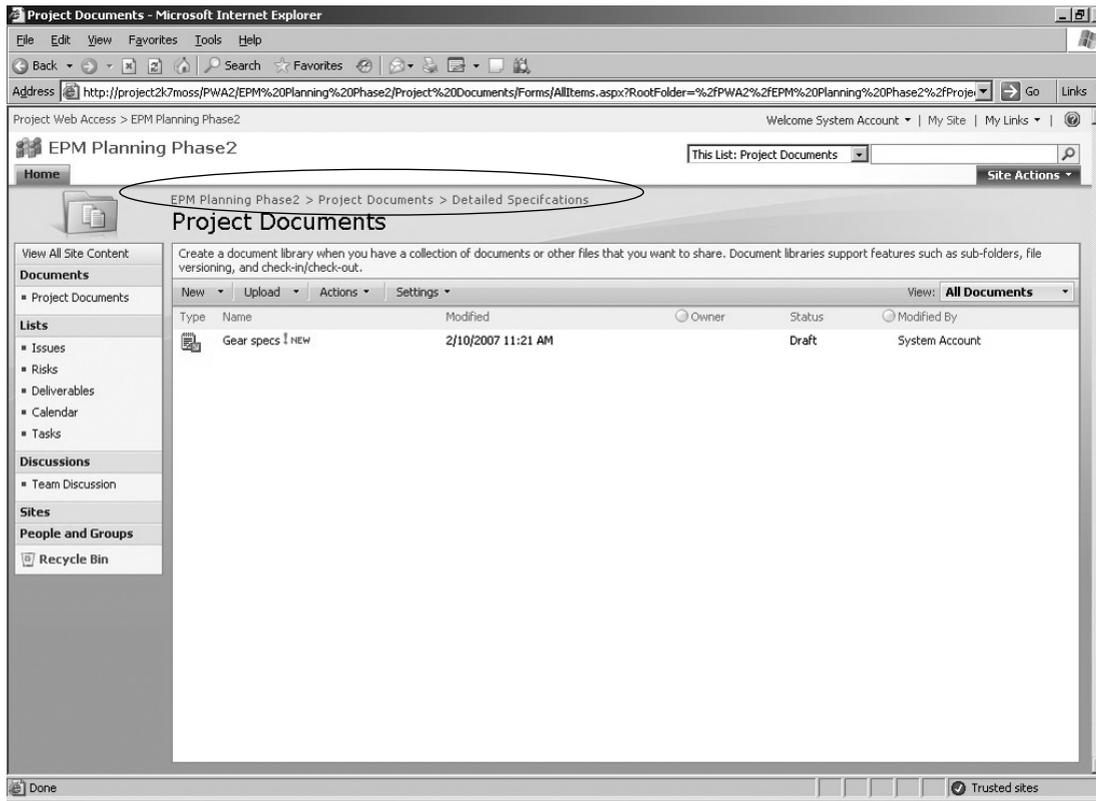


FIGURE 3-5 Bread crumbs

Workflow

There is a project workflow built into Project Server that includes the basic project management functions. At a high level, the basic workflow follows the path of building a project, staffing it, notifying the people of their assignments, and allowing for the team members to report their time and task status to their manager and project manager. The manager and project manager can then approve or reject submissions, and changes are updated into the project. The .NET 3.0 framework required to run WSS and PWA includes the Windows Workflow Foundation (remember not to call it WWF). This workflow engine allows creation of custom workflows that can be used in WSS and its PWA superset. An example of how this might be used is for routing new project requests.

More discussion about workflow, including a step-by-step custom workflow building process, is included in Chapter 25. That workflow is built using the new SharePoint

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Designer 2007 (also known as “son of FrontPage”), which supports many simple-to-moderate workflow possibilities. More complex workflow development is also possible through the use of Microsoft Visual Studio 2005.

Item-Level Security

WSS has a hierarchical structure that starts at the site collection, then goes to the site, then the list or library, then the item.

In WSS 2003, you could secure content at the site collection, site, and library/list level. In most cases, this was adequate. Occasionally, however, it made sense to secure an individual item and that was not supported in the 2003 version without the addition of another software package (Microsoft Rights Management Server). In version 3.0, WSS enables you to secure an item with different permissions than the library/list within which it resides. Figure 3-6 shows how the user interface appears while the user is managing an item’s security.

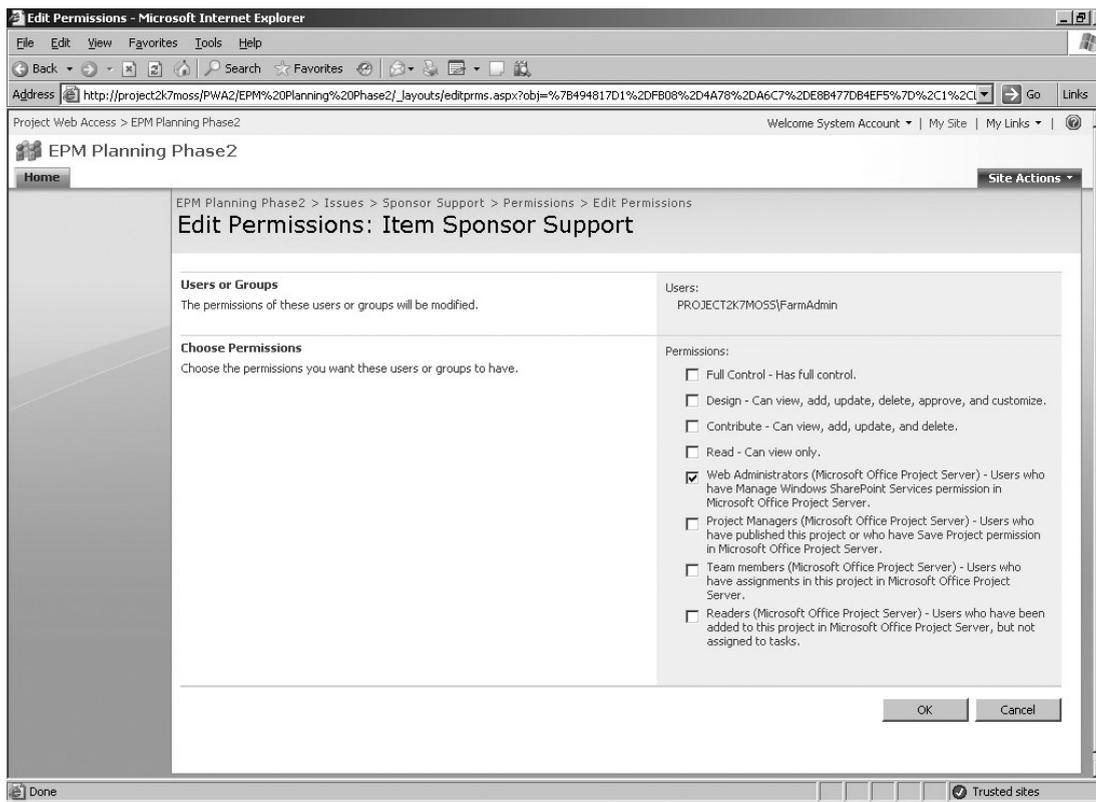


FIGURE 3-6 Item-level security

Easily Customizable Navigation

For changes in navigation elements, there is now a screen from which you can easily add sites or pages. You can use either the Quick Launch (on the left side) or Tabs (at the top) navigation, as shown in Figure 3-7. In addition, it is easy to reorganize the navigation buttons. Also, there is a feature that allows for a choice between leaving the Quick Launch bar fully expanded and expanding it only for the area of the site currently being used (see Figure 3-8).

Task List in WSS—Project Management “Light”

This feature allows the user to piece together a schedule using an out-of-the-box WSS 3.0 list and Web Part. The user can create tasks with start and end dates and assign resources, and manual fields are available for “% Complete” and task status (started, in progress, and so on). The Web Part displays the items in a bar chart (Gantt) format. There is no calculation component, nor are dependency functions included. The user can export items to the Project Professional (or Standard) client from this area as a basic starting point for a new project. Given the tools available in the rest of the EPM solution to perform similar processes with more flexible and advanced features, this WSS feature may be best used in an organization just starting to consider project management.

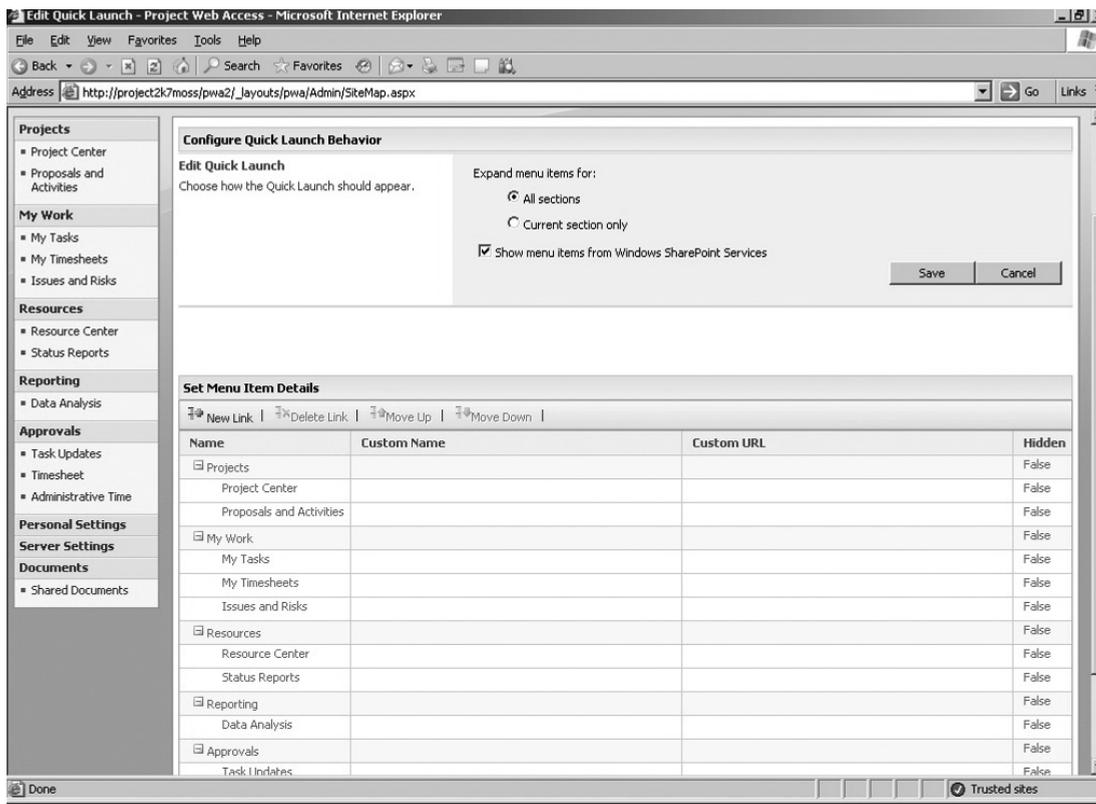


FIGURE 3-7 You can change navigation elements.

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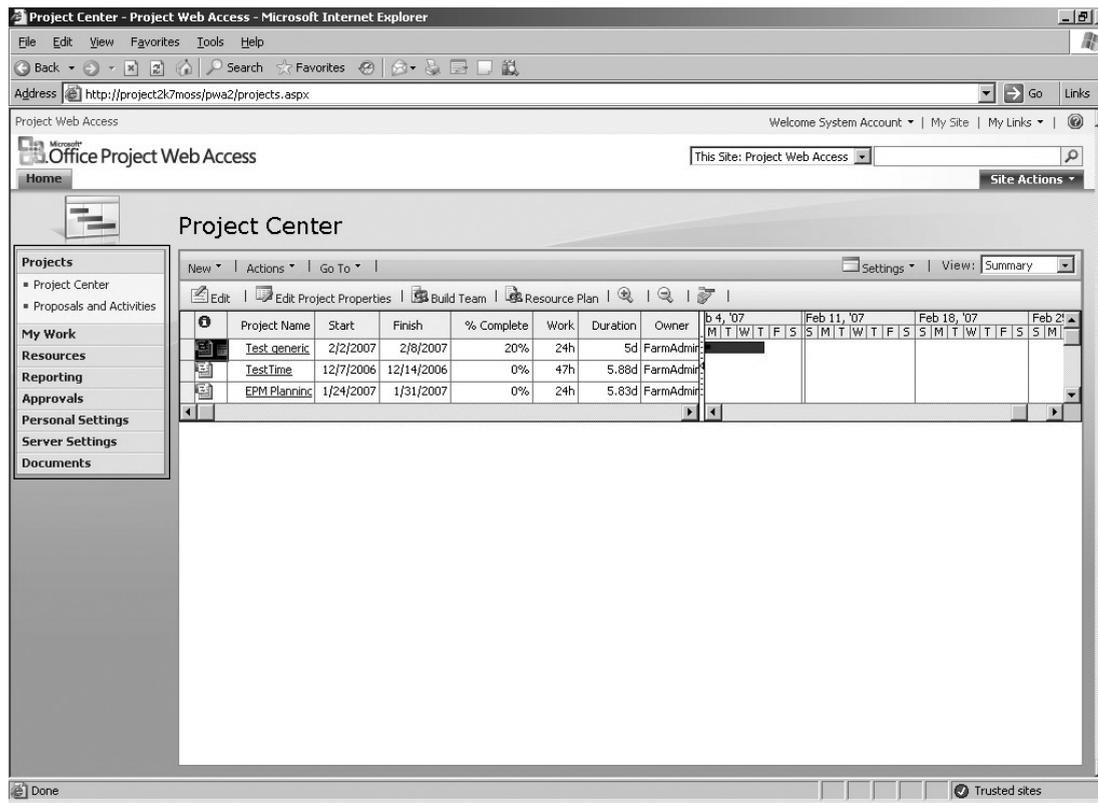


FIGURE 3-8 A customized collapsed Quick Launch bar

Project Web Access

As discussed in Chapter 3, Project Server 2007 provides a set of services that are presented through the PWA interface, which is a Web browser–based client that is at the core of this solution. PWA is the display side of Project Server and uses WSS 3.0 as its base platform. The following subsections focus on changes in the PWA-specific tools. There have been major improvements in PWA. Some of these items, such as time and task entry, are covered in more detail later in this book. Other items with a lesser profile may be discussed exclusively in this chapter.

The Completely Rearchitected and Improved Time and Task Entry

The 2003 timesheet was not bad but had limitations. In Project Server 2007, there has been a major redesign of the time and task reporting and approval process.

Included is the ability to separate the pure time reporting function (how many hours did I work last week?) from the updating of progress on project tasks (how is my task progressing and what remains for it to be completed?). Resource or functional managers now have time approval authority as most organizations prefer. Time that is reported is then imported into the area where project tasks can be updated. This new process has

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addressed requests that have been made by EPM customers in the past, but is not without flaws. There are some technical issues with the new time and task functions as well as functions that could have been designed differently for better overall usability. It is better than it was, but there is still much room for improvement. You will learn more on how to use these features in Chapter 18.

Time and Task Approvals

Timesheets no longer require a two-step process for someone with authority to approve their own time using automatic self-approval. In addition, comments associated with the time and task entry appear as a specific icon in the approval view's Indicator column or in a field in a view.

Ad Hoc Task and Time Reporting Support

Some organizations will create places to track all types of work, whereas others will not. One new option is just to add a line to the Tasks page (and timesheet) for something that was not preplanned for submission. As shown in Figure 3-9, the user can add a brand new task to a project plan, assuming permissions allow the user to do so.

1. Task Location
Where would you like the task to appear in the project plan?

Project:

Subordinate to Summary task:

2. Name
Type the name of the new task or select an existing task to assign to yourself.

New Task
Task name:

Existing Task
Assign the following task to myself:

3. Task Dates
Specify the start and finish dates of the task to be added to the project plan.

Start:

Finish:

4. Timesheet
Do you want to add this new task to your current timesheet?

Add Task to Timesheet

5. Comments
Do you have any comments about adding this new task?

Comments:

Submit Cancel

FIGURE 3-9 Add a task (with the Add Task to Timesheet checkbox).

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The Task-Level Notes Field

This feature, shown in Figure 3-10, allows team members to send a note to approvers with task-level comments attached in addition to more global timesheet and task submission comments.

Team Tasks

It is now possible to assign to a project task a team rather than just an individual. When a team is assigned, each resource can see the item, and a single resource can then assign themselves, and record progress on the task.

Calendar View

Resources can now see their assignments in a calendar format (see Figure 3-11).

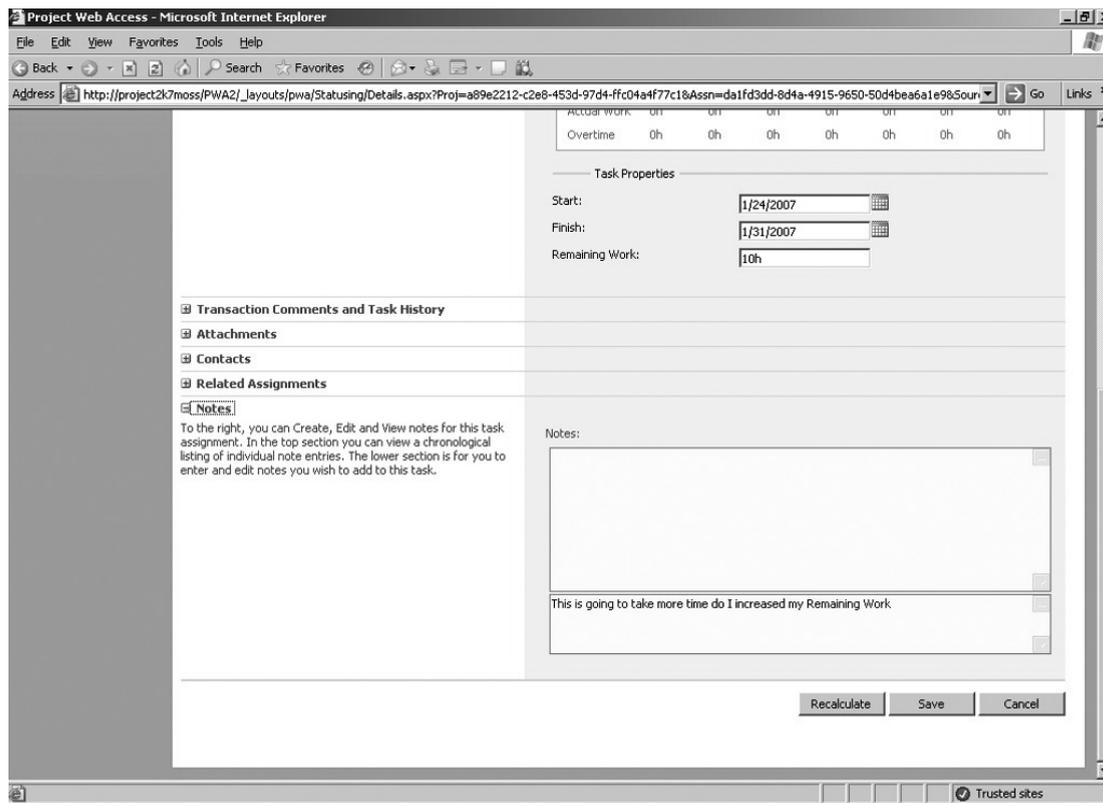


FIGURE 3-10 Adding a note to a task update

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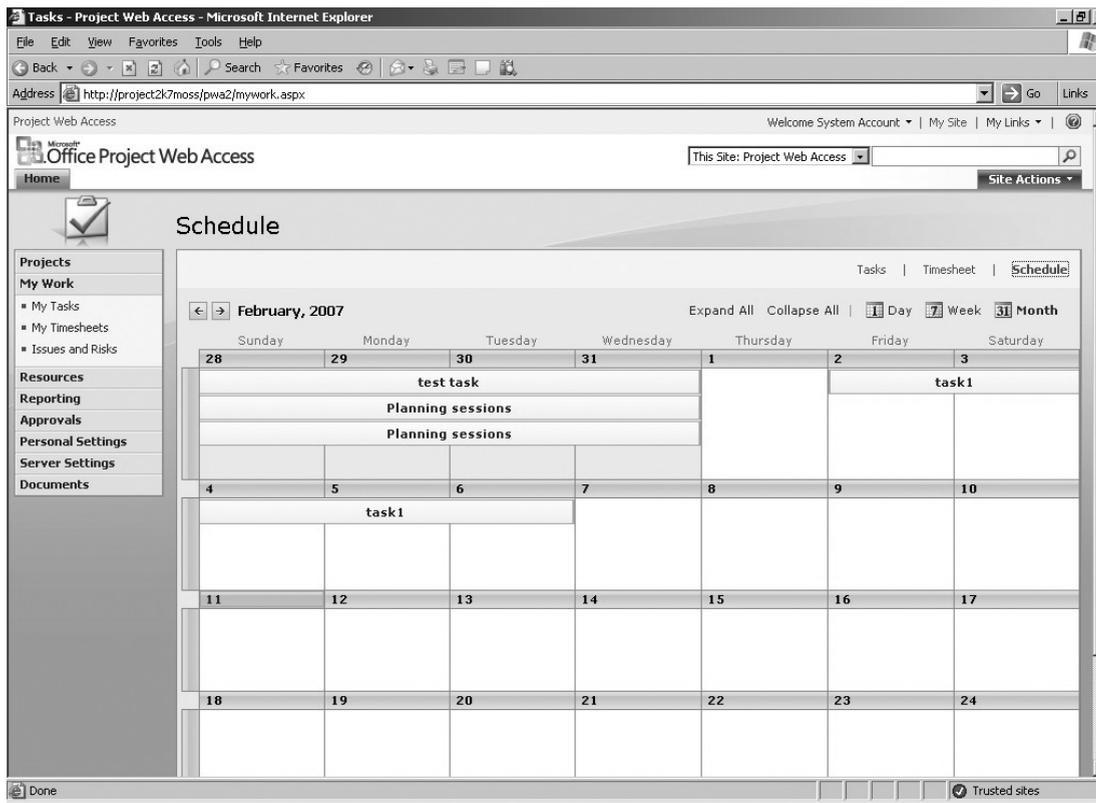


FIGURE 3-11 Calendar View

Easier and More Logical Administration Pages

Starting with the already improved SharePoint UI and redesigning the information architecture into a broader and less deep set of drill downs has made administrators' work easier and more intuitive. The PWA Administration pages are organized into eight areas, offer much better inline explanations than ever before, and are more logically subdivided. Figure 3-12 shows a high level view of the PWA Administration top screen.

WSS Administration pages for the site that hosts PWA are available on a different page and are organized using the same WSS standards (see Figure 3-13).

Task Views Color Coding and Screen Tips

Team members who are in My Task views can see which task's finish dates are imminent or late. Notice in Figure 3-14 the shading on late tasks as well as the screen tip.

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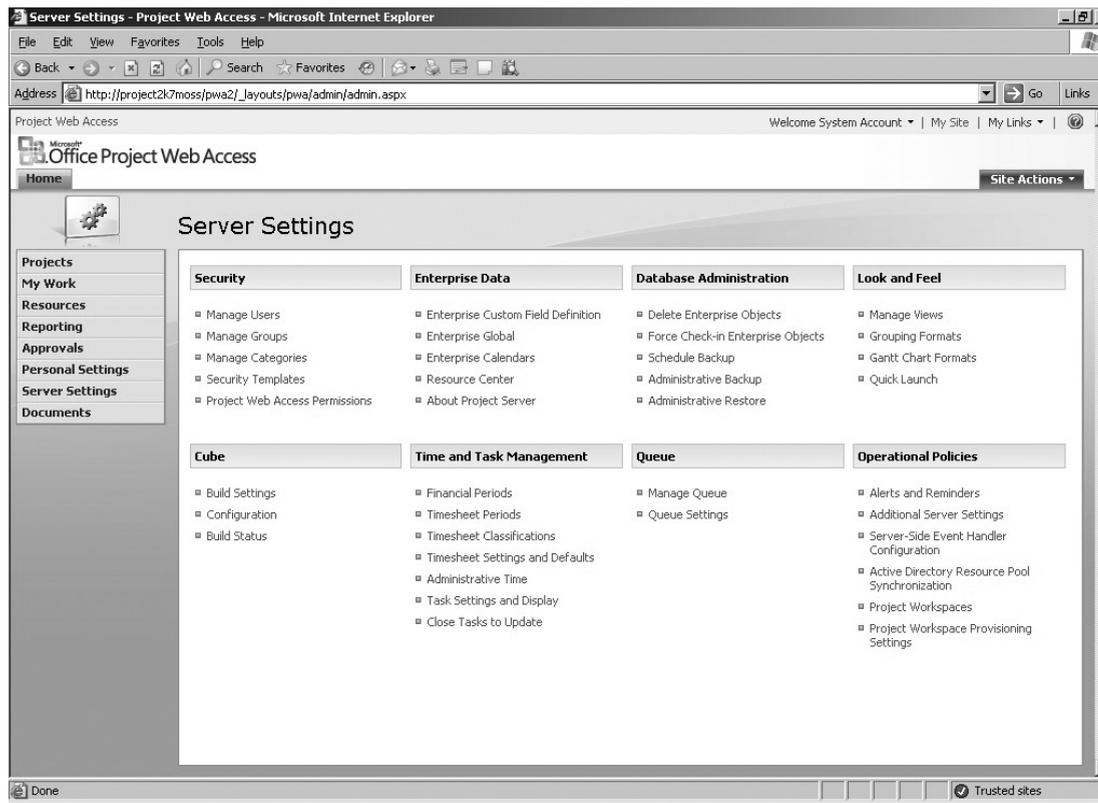


FIGURE 3-12 The main PWA Administration page

Project Workspace Subsite Provision

As mentioned before, Project Server can be set up to autoprovision a Project Workspace for project team collaboration. A new feature in 2007 allows you to create that new site either at the top level or below an existing Project Workspace. This useful feature can help support programs (a set of related projects) that might be better off with several subsites under the larger program top-level site. The new Provisioning a Sub-Site dialog box is shown in Figure 3-15.

Budget Resources

A project's Budget should be an amount of Cost and/or Work that is allocated to execute all the tasks needed to complete the project requirements. In previous versions, there really was no way to track against a budget. Instead, the "project budget" was most commonly built by completing the Work Breakdown Structure/project schedule in Project Professional, adding resources that have associated rates and sometimes including material costs. When these items were completed, Project Professional calculated a total cost that, when

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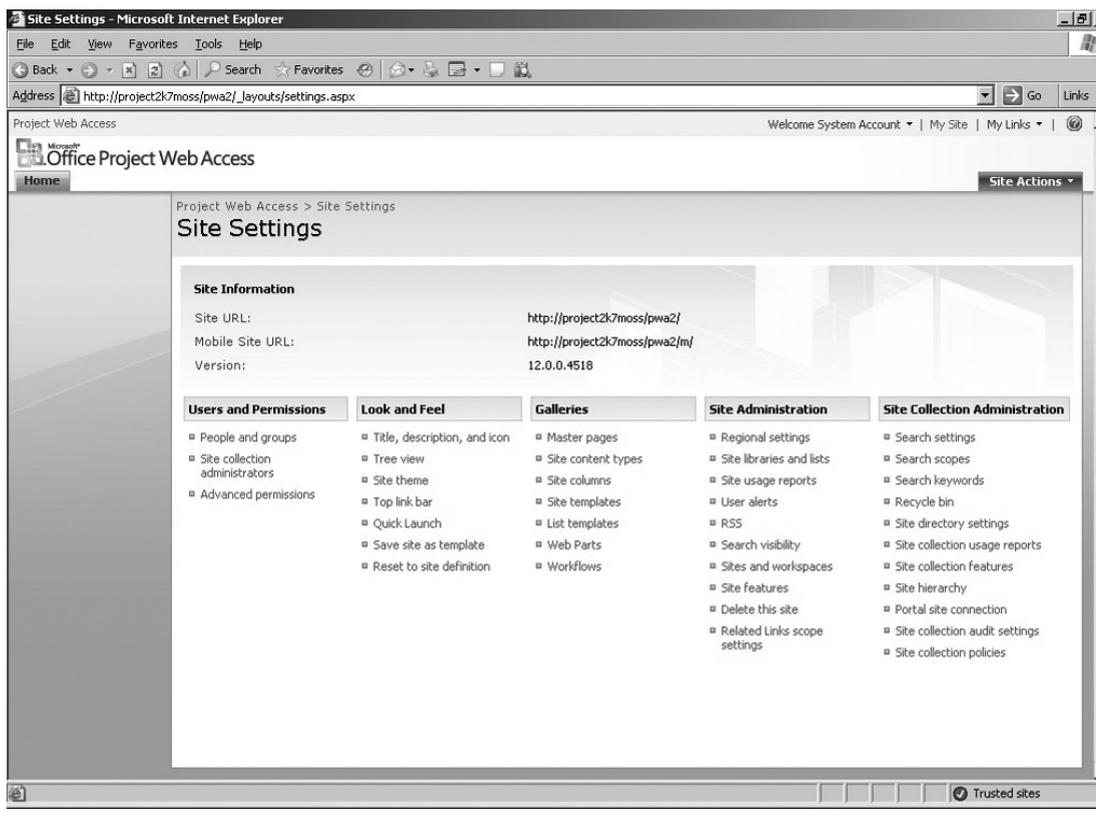


FIGURE 3-13 Site settings in PWA

baselined, represented the “budget.” In the 2007 version, the user can identify budget costs and budget work separately by designating budget resources. This solves the problem with previous editions by allowing the Project Manager to assign specific Budget Resources to the project. For example, suppose that Project XYZ has budget costs of \$200,000 based on budget work of 2,000 hours of work. The Project Manager can assign Budget Work and Budget Cost resources to the plan and enter the \$200,000 into the Budget Cost and 2,000 hours into the plan. Thus a budget is built. The result is that these numbers can be compared to the “Estimated at Complete” cost and work or other fields. Budget resources, which can be categorized for later reporting, are associated at the project level by assignment to the Project Summary Task (Task 0).

Cost Resource Type

It was always difficult in the past to track ad hoc expenses such as project-related lodging, mileage reimbursements, and meals. The new Costs Resource Type enhances the supports for tracking these costs.

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The screenshot shows the 'My Tasks' page in Microsoft Office Project Web Access. The page displays a list of tasks with the following columns: Task Name, Start, Finish, Progress, Health, and Resource Name. A red box highlights the 'Health' column for the 'Project Kick Off Meeting' task, which displays the message 'Scheduled finish date has passed'.

Task Name	Start	Finish	Progress	Health	Resource Name
EPM Planning Phase2					
Planning sessions ! NEW !	1/24/2007	1/31/2007	0d of 1.25d (0%)		Ariel Esther
Planning sessions !	1/24/2007	1/31/2007	0d of 1.25d (0%)		Aaron Sheldon
Project Kick Off Meeting ! NEW	1/24/2007	1/24/2007	Scheduled finish date has passed		Jonathan Arther
Project Kick Off Meeting ! NEW	1/24/2007	1/24/2007	0d of 0.167d (0%)		Aaron Sheldon
Project Kick Off Meeting ! NEW	1/24/2007	1/24/2007	0d of 0.167d (0%)		Ariel Esther
Test generic					
task1	2/2/2007	2/6/2007	1d of 3d (33%)		FarmAdmin
TestTime					
test task !	12/7/2006	1/31/2007	0.5d of 5.875d (9%)		FarmAdmin

FIGURE 3-14 Onscreen hints for late and imminent tasks

The screenshot shows the 'Publish Project: Provisioning a Sub_Site' dialog box. The dialog box has the following fields and options:

- Project Workspace:**
 - Create a workspace for this project
 - Provision the workspace as a sub-workspace of another project?
 - Select a project: [Dropdown]
 - Virtual Server: http://project2k7moss [Dropdown]
 - Site URL: PWA2 [Text] / Provisioning a Sub_Site [Text]
 - Target URL: http://project2k7moss/PWA2/Provisioning a Sub_Site [Text]
 - Do not create a workspace at this time

FIGURE 3-15 Provisioning a Project Workspace

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The screenshot shows a web browser window titled "New Proposal - Project Web Access - Microsoft Internet Explorer". The address bar contains the URL: `http://project2k7moss/pwa2/_layouts/PWA/LightWeightProjects/LWPDDetails.aspx?IsProposed=1`. The main content area is titled "New Proposal" and features three buttons: "Save", "Save and Publish", and "Close". Below the buttons are two tabs: "Work Details" (unselected) and "Summary Information" (selected). Under "Summary Information", there are two main sections: "New or Import" and "Name and Description".

The "New or Import" section has two radio buttons: "New" (selected) and "Import from SharePoint list". Below the "Import from SharePoint list" option is a button labeled "Select SharePoint list".

The "Name and Description" section contains a "Name" text box with the value "ERP Upgrade" and a "Description" text area with the text "This long overdue upgrade is required to keep our support options open". Below these are "Start Date" and "End Date" fields. The "Start Date" field is set to "2/11/2007".

Below the "Name and Description" section is the "Plan Owner" section, which includes a "Plan Owner" dropdown menu currently set to "FarmAdmin". At the bottom of the form is a section for "Project Custom Fields" with a "State:" label.

FIGURE 3-16 The New Proposal page

Proposals

Each organization might handle incoming project requests in several ways depending on how the organization approaches its Microsoft Office Project Server 2007 effort. One new way is to use a feature called Proposals (see Figure 3-16). Potential projects can be entered at a fairly high level for visibility and consideration. They can then be promoted to full project status later if appropriate.

The Proposals feature has both advantages and disadvantages over other options for project intake. Other options include using InfoPath (especially when the Forms Services feature is added with Microsoft Office SharePoint Server) a custom SharePoint list with associated workflow, or if the organization decides to also implement Microsoft Project Portfolio Server, that includes options for incoming projects. Which method is appropriate depends on the organizational needs of the individual company.

Activities

Activities replace the previous To Do lists. There are two ways to approach the use of activities. The first is to use them for managing maintenance and support type tasks. These can have a team assigned through the use of a resource plan. The second is to use them in the same way that To Do lists were used in the past: as a single user's set of items to be accomplished.

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Unlimited Custom Enterprise Fields and Codes

In previous versions, the total number of available fields and codes was not an issue, although the limited number for each type of field was a problem. Those internal limits are no longer present in the 2007 version.

NOTE *In fact, there are extremely high limitations in all areas, such as the maximum number values of 9,999,999,999,999.99 and 50,000 predecessors per task. For more on limitations, go to <http://office.microsoft.com/en-us/project/HP101065651033.aspx>.*

The Status Manager Enterprise Task Field

The owner of a project is the person who first publishes it to Project Server. This ownership can be changed later, but is best thought of as the project manager of the entire project. It is possible, just as it was in the 2003 version, to have someone other than the project manager manage the tasks within a project. The status manager is the person who will receive task updates when team members update their tasks from PWA task pages. The Status Manager Enterprise task field is now exposed to the user interface, where the user can modify it to support multiple project managers managing tasks within a single project. This process of changing who is in charge of managing a task is more straightforward than the method that was required to get similar functionality in Project Server and Project Professional 2003. There are some issues with this field, which are discussed (and an example workaround is included) in Chapter 21. Figure 3-17 shows the Status Manager field in action.

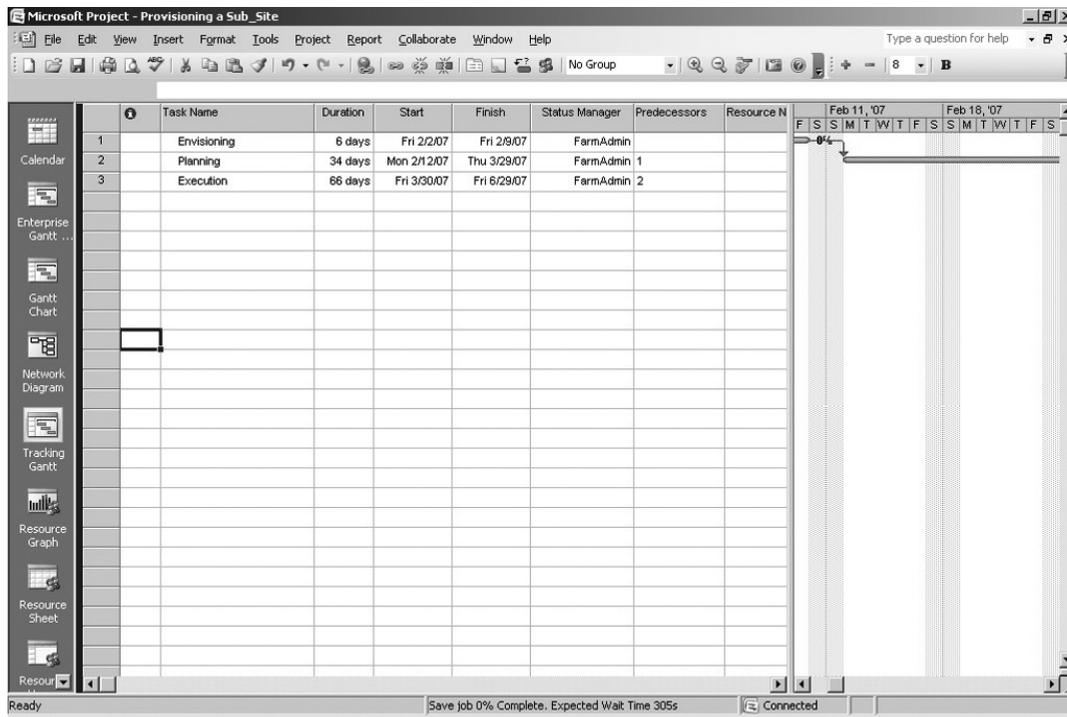


FIGURE 3-17 The Status Manager task field as shown in Microsoft Office Project Professional 2007

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The Publish Enterprise Task Field

It is not until tasks are published that team members are notified of assignments, items appear in timesheets, resources become utilized, and so on. A valuable new feature is an Enterprise task field that allows the project manager to publish only portions of a project plan from Project Professional 2007 (see Figure 3-18).

Individually Targeted Issues and Risks Page

Each user can go from the Home Page to a page that includes a summary of their issues and risks across all their projects, as shown in Figure 3-19.

The Project Server Interface

The new application programming interface (API) is called the Project Server Interface (PSI). This .NET-based set of interfaces is far more broad and flexible than in any previous version of Project Server and offers a strong alternative for customizing the way that Project Server functions. There is even a page that exposes event-handler configuration in the PWA interface. There is also a Project Server 2007 Software Development Kit. At the time of the editing of this book, it was located at <http://msdn2.microsoft.com/en-us/library/bb187387.aspx>.

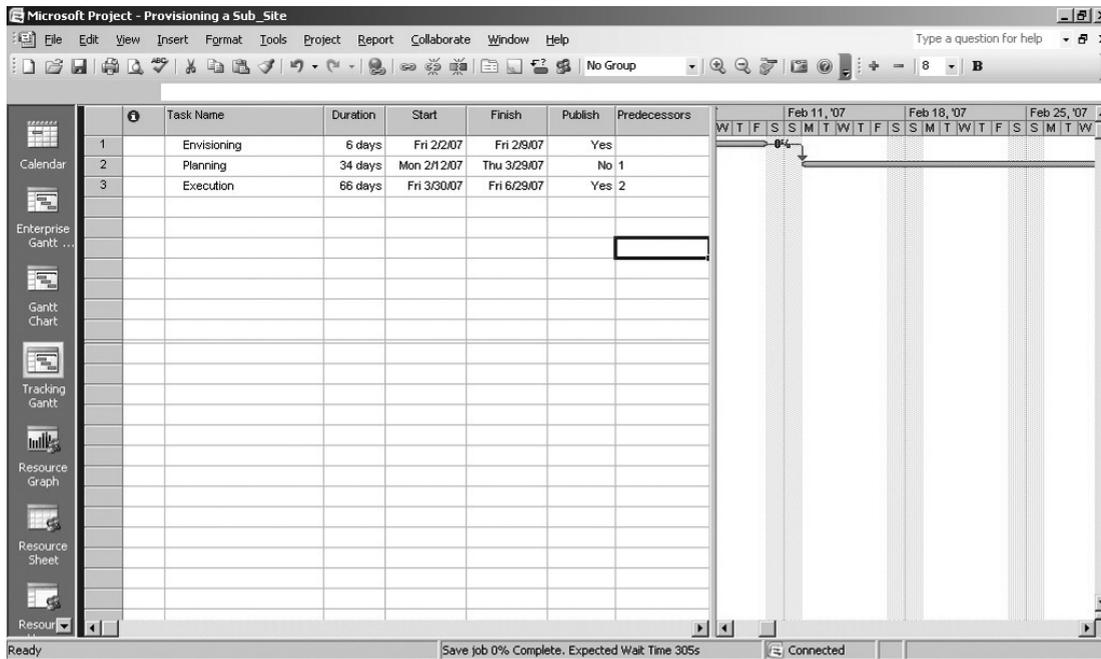


FIGURE 3-18 The Publish field

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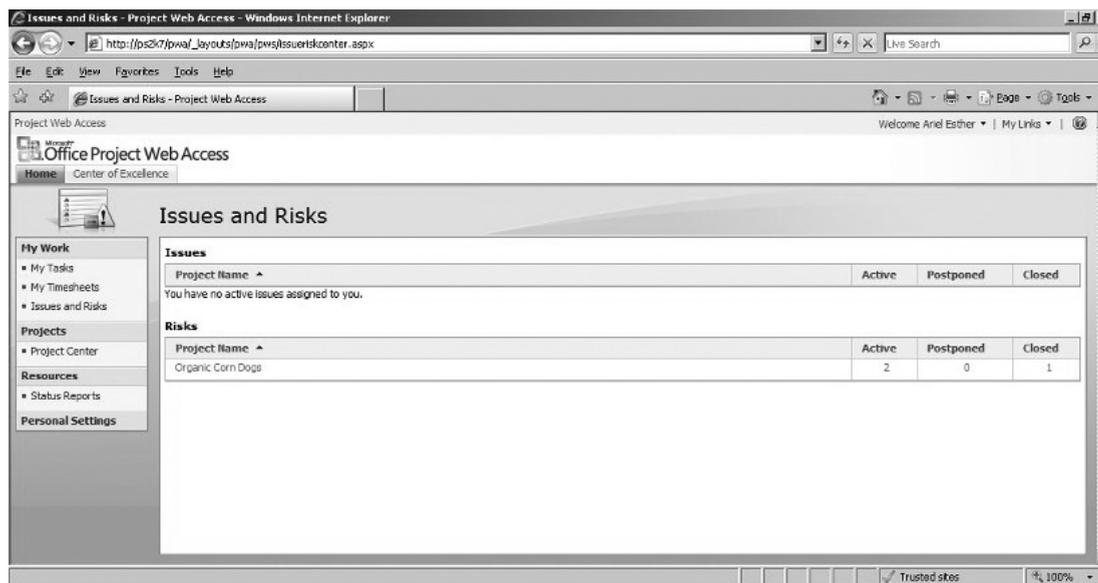


FIGURE 3-19 The Issues and Risks page

Feature	2003	2007
Activities		X
Ad Hoc Task and Time Reporting		X (not advisable)
Admin Projects with Ability to Designate Specific Team	X	
Almost Unlimited Enterprise Fields		X
Auto Self Approval of Timesheets for Managers		X
Better Application Interface for Custom Development		X
“Bread Crumb” Navigation		X
Budget Resource		X
Calendar View of Assignments		X
Collapsible Context-Based Quick Launch Navigation		X
Color Coding and Other Graphical Hints on Tasks		X
Cost Resource (Supports One-Time Costs Such as Travel Expenses)		X

TABLE 4-1 Feature Comparison Table

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Feature	2003	2007
Deliverable-Based Planning		X
Document Management	X	X
Easily Customizable Navigation		X
Filter by RBS (to Support My Resources Views)		X
Force Check-Out of Documents in Document Libraries		X
Global Administrative Time		X
Hide the Left Navigation Pane	X	
Integration with SharePoint Server (in 2003 Portal Server)		X
Item-Level Security		X
Limited Custom Enterprise Fields	X	
Major and Minor Document Versions		X
Mix and Match Web Parts in PWA and Project Workspaces		X
Multiple Options for Publishing	X	
My Risks and Issues Page		X
Office Integration	X	X-Better
Portfolio Modeler	X	
Project Management Lite		X (but of very low value)
Project Pro Multiple-Level Undo		X
Project Workspace Subsite Provisioning Option		X
Proposals		X
Publish Field (Allows Projects to Be Partially Published as in Phase One Only)		X
Reasonable Ability for Look and Feel Changes		X
Recycle Bin to Recover Documents		X
Save Link Feature for Individual Views	X	
Security Trimmed UI		X
Single Interface for PWA and Project Workspaces		X
Single Publish Process (Automated Decision Making)		X

TABLE 4-1 Feature Comparison Table (Continued)

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Feature	2003	2007
Single Timesheet (to PM for Approval)	X	
Status Manager Field Exposed (Allows Changes to Individual Task Manager)		X
Support for Programs	Minimal	Better
Task Drivers		X
Task Transaction-Level Comments		X
Task Updates for PM Approval		X
Team Tasks		X
Timesheet to Resource Manager for Approval		X
To Do Lists	X	
Transparent Scheduling (Task Highlighting)		X
Two-Way Choice on Automatically Provisioned Project Workspace (Auto or by Choice)		X
Two-Way Choice on Automatically Provisioned Project Workspace (on or off)	X	
Versioning on Lists		X
Workflow without Custom Code		X

TABLE 4-1 Feature Comparison Table (Continued)

Project Professional 2007

The focus of this book is on Microsoft Office Project Server 2007, but just as it was important to discuss WSS 3.0, it is also crucial that we provide some level of coverage of Microsoft Office Project Professional 2007. Microsoft Project is by far the market leader in the project management tool market and acts as the main toolset for those in the project manager role in Microsoft EPM. We will not be discussing general use of Project Professional in this book, but rather focusing on the areas where Project Professional interfaces with Project Server. In Chapter 3, improvements in connectivity were discussed as well as items such as caching. This section discusses some significant changes—some directly connected to Project Server, others just worth mentioning.

Multiple-Level Undo

If there was ever a feature that people clamored for in Microsoft Project, multiple-level undo was it. Project has improved with every version, becoming more and more powerful over time. Performing more than a single undo has never been allowed until now (see Figure 3-20). The new version allows up 99 levels of undo (and redo). You probably won't need this many levels, but this is a major improvement.

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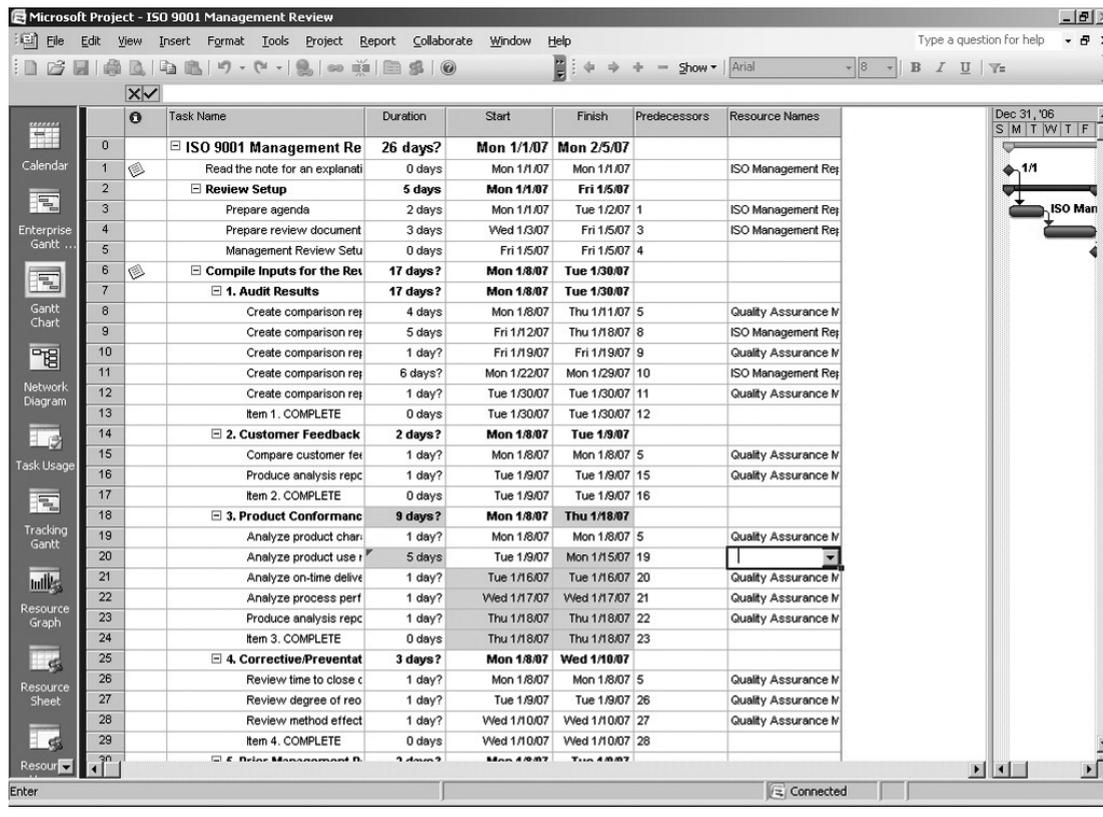


FIGURE 3-21 Transparent scheduling

A Single Publish Command

When publishing a project to Project Server 2003, you could select from one of four commands: Publish All, Publish Project Plan, Publish New and Changed Assignments, or Republish Resource Assignments. Each had its place depending on the circumstances and the need at the time. In Microsoft Office Project Server and Project Professional 2007, there is a single Publish command found in the File menu that takes care of most of the decision making for the person publishing the project.

Gantt Bars

Project Server 2007 has made a minor improvement in the appearance of Gantt bars, which now offer a three-dimensional look, as shown in Figure 3-23.

Miscellaneous Features

The following are the additional features available in Project Server 2007.

Chapter 3: New Features and Some That Have Been Retired 49

Task ID	Task Name	Duration	Start	Finish	Predecessors	Resource Names
0	ISO 9001 Management Review	26 days?	Mon 1/1/07	Mon 2/5/07		
1	Read the note for an explanation of the purpose of this template	0 days	Mon 1/1/07	Mon 1/1/07		ISO Management Review
2	Review Setup	5 days	Mon 1/1/07	Fri 1/5/07		
3	Prepare agenda	2 days	Mon 1/1/07	Tue 1/2/07	1	ISO Management Review
4	Prepare review document	3 days	Wed 1/3/07	Fri 1/5/07	3	ISO Management Review
5	Management Review Setup	0 days	Fri 1/5/07	Fri 1/5/07	4	
6	Compile Inputs for the Review	17 days?	Mon 1/8/07	Tue 1/30/07		
7	1. Audit Results	17 days?	Mon 1/8/07	Tue 1/30/07		
8	Create comparison report	4 days	Mon 1/8/07	Thu 1/11/07	5	Quality Assurance IV
9	Create comparison report	5 days	Fri 1/12/07	Thu 1/18/07	8	ISO Management Review
10	Create comparison report	1 day?	Fri 1/19/07	Fri 1/19/07	9	Quality Assurance IV
11	Create comparison report	6 days?	Mon 1/22/07	Mon 1/29/07	10	ISO Management Review
12	Create comparison report	1 day?	Tue 1/30/07	Tue 1/30/07	11	Quality Assurance IV
13	Item 1. COMPLETE	0 days	Tue 1/30/07	Tue 1/30/07	12	
14	2. Customer Feedback	2 days?	Mon 1/8/07	Tue 1/9/07		
15	Compare customer feedback	1 day?	Mon 1/8/07	Mon 1/8/07	5	Quality Assurance IV
16	Produce analysis report	1 day?	Tue 1/9/07	Tue 1/9/07	15	Quality Assurance IV
17	Item 2. COMPLETE	0 days	Tue 1/9/07	Tue 1/9/07	16	
18	3. Product Conformance	9 days?	Mon 1/8/07	Thu 1/18/07		
19	Analyze product characteristics	1 day?	Mon 1/8/07	Mon 1/8/07	5	Quality Assurance IV
20	Analyze product use requirements	5 days	Tue 1/9/07	Mon 1/15/07	19	
21	Analyze on-time delivery	1 day?	Tue 1/16/07	Tue 1/16/07	20	Quality Assurance IV
22	Analyze process performance	1 day?	Wed 1/17/07	Wed 1/17/07	21	Quality Assurance IV
23	Produce analysis report	1 day?	Thu 1/18/07	Thu 1/18/07	22	Quality Assurance IV
24	Item 3. COMPLETE	0 days	Thu 1/18/07	Thu 1/18/07	23	
25	4. Corrective/Preventive Action	3 days?	Mon 1/8/07	Wed 1/10/07		
26	Review time to close corrective action	1 day?	Mon 1/8/07	Mon 1/8/07	5	Quality Assurance IV
27	Review degree of rework	1 day?	Tue 1/9/07	Tue 1/9/07	26	Quality Assurance IV
28	Review method effectiveness	1 day?	Wed 1/10/07	Wed 1/10/07	27	Quality Assurance IV
29	Item 4. COMPLETE	0 days	Wed 1/10/07	Wed 1/10/07	28	
30	5. Prior Management Review	3 days?	Mon 1/8/07	Tue 1/9/07		

FIGURE 3-22 The Task Drivers pane

Support for Master/Sub Projects

This support enables users to manage large programs as smaller projects and to maintain them inside a single “master” plan. This support was always available in Microsoft Project when it was run as a stand-alone application, but raised serious difficulties when Project was used with Project Server. Microsoft has improved this support and it now works well. More details on this support are provided later in the book.

Deeper Office Integration with Office 2007

Microsoft Office 2007 offers better integration, whether with Excel and Visio for reporting or with Office known document types (including Word, Excel, PowerPoint, or any other document with an iFilter), for Check-In/Check-Out as well as major and minor versioning.

The key change is in the way that Project Server works with Outlook 2007. Instead of using the Outlook Calendar for tracking project tasks, Project Server now uses the Tasks feature in Outlook. Note that just as in Project Server and Outlook 2003, Outlook pulls this information from Project Server, and that Project Server has no feature that enables it to recognize existing the Outlook Calendar or tasks as a way to block available time for projects.

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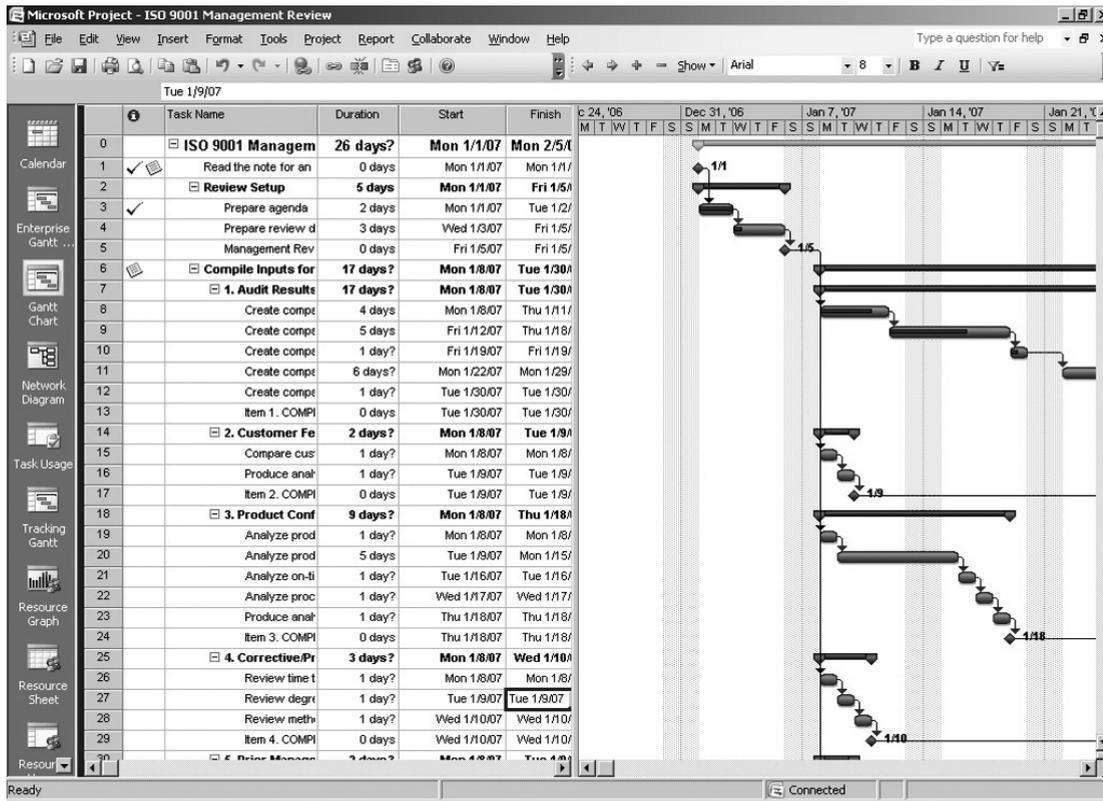


FIGURE 3-23 Gantt bars

Features No Longer Available

The following features are no longer available in Project Server 2007. Most of these are no longer needed or were not our favorites, such as the Portfolio Modeler; others we miss (such as Save Link).

Save Link

In Project Server 2003, the Save Link feature enabled users to save a view to a link after making personalized changes. Some examples include dragging a column to a different location on the page, setting a specific filter, and sorting the view differently from the default. This feature is no longer available.

Portfolio Modeler

The Portfolio Modeler was a tool that allowed for some “what-if scenario” modeling on projects. Project Server no longer includes such a function. However, a similar function that

works better in any case is available in the new Microsoft Project Portfolio Server product. The Project Portfolio Server is a product that Microsoft purchased and modified somewhat and which includes a gateway to Project Server. Although the Project Portfolio Server functionality is not discussed in depth in this book, note that it is far broader and deeper than what Project Server previously offered for “what-if” processes. The tools that support Project Portfolio management are particularly strong.

To-Do Lists

To-Do lists have been replaced by activities, as discussed previously in this chapter.

Hiding of the Left Navigation Pane

The 2003 version included a feature that collapsed the PWA left navigation, freeing more screen space for the viewer. This feature is no longer present in the 2007 version.

A Word on Microsoft Office SharePoint Server (MOSS) 2007 and Project Server

In Project Server 2003 environment, SharePoint Portal Server had only the slimmest possibility of being useful. For example, you could use the SharePoint Portal Server Search feature to crawl and index the WSS 2003 team sites by identifying the Project Server WSS environment as a Content Source. Mostly, though, if you used SharePoint Portal Server 2003 for an intranet, for example, there was not really any connection to a Microsoft EPM solution environment. In fact, even WSS was not required for the use of Project Server.

As seen previously, WSS 3.0 is the base platform for PWA and is required. In 2007, the Microsoft Office SharePoint Server can be used to enhance the Project Server environment significantly. It is not required and, if chosen, it does add cost to the deployment of Project Server. However, it can be used for better business intelligence on project, resource, and financial data; better support for forms such as an InfoPath-based new project request form; better search capability; and more. This book will go deeper into this topic later.

This chapter described the extensive (and very useful) new features and improvements, as well as some features that are no longer available. In the next chapter, we move on to the processes for planning the deployment of a Microsoft Office Project Server 2007 platform with all its EPM tools.

