HOL140 - Walkthrough of the Microsoft Office Enterprise Project Management (EPM) Solution: Administration, Development and Solution Capabilities

Overview of the Microsoft Office EPM Solution Lab:

This Microsoft Office EPM Solution lab is a combination of 3 labs allowing the student a broad overview of the solution from the end user, administrator and developer perspective. Each lab within this manual is standalone and not dependent on any other labs, allowing you to gain the core information you need in order to assess the solution and its capabilities. The lab is focuses on the following areas:

- **Overview of the Microsoft Office Enterprise Project Management Solution**
  Work though a day in the life of an enterprise project management oriented corporation, from developing the project plan to identification of project issues and best steps for resolution. *This lab is targeted at a student who would like to get an overview of the solution, its features and capabilities.*

- **Project Data Service (PDS) Developer Walkthrough**
  This lab will step the developer through the process of using the PDS, the Project Server API, to perform various actions on a Project Server installation. These actions include programmatically checking out the Enterprise Resource Pool, adding a new resource, editing resource information and adding a new project. The lab will use the PDSTest utility that is available as part of the Project Server 2003 Software Development Kit. It allows you to send PDS method directly to the server. Doing this you can test the specific PDS methods you wish to use in your application before running them in your code. *This lab is targeted at the student interested in learning more about how to develop solutions using the Project Server API.*

- **Project Server Administration**
  This lab will walk you through the steps to perform several of the most common actions taken by an Administrator of a Project Server system. While this is by no means a complete list of the things that an administrator will do on a system it is representative of some of the more common things that are done by an administrator.
  This lab is targeted at the student interested in learning more about how to administer Project Server and the Microsoft Office EPM Solution.

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Lab 1: Overview of the Microsoft Office Enterprise Project Management Solution

Overview

Acting as Scott Cooper, an **Executive or Business Decision Maker (BDM)**, you'll be the first to be introduced to Project Web Access, used by everyone involved in projects in the organization from any location. As an executive Scott's use of Project Web Access does not require knowledge of the complexities of project scheduling or of Microsoft Office Project Professional 2003. Here, he has the ability to evaluate and model schedules, resources, and cost data over time and across projects to identify trends and address problem areas.

Using the Project Center, Scott will look at all the projects in the corporation by navigating through customized fields (enterprise codes) such as location and department. He will see the current status for each project and how it compares to its target schedule. Management actively uses efficiency and effectiveness metrics for decision making and for improving processes.

Graphical indicators will highlight problem projects, which Scott investigates further by drilling into details and raising an issue for the appropriate resource manager to address.

As a Business Decision Maker, Scott wants to see resource and cost graphics on projects. Using Portfolio Analyzer, he examines resource usage and availability in spreadsheet and graphic form for individual projects, departments, and locations, as well as for the corporation as a whole.

You'll now act as Mark Lee, **Resource Manager,** to address the issue raised by the executive/BDM. After reviewing the department's resource utilization, Mark reassigns work to clear overloads. Using Build Team from Enterprise, you will propose staff resources based on their skills as related to the project tasks. Now the issue can be forwarded to the Project Manager for resolution.

Next, you'll fill the role of Ben Smith, **Project Manager,** and open the new project in Project Professional from an enterprise template. When you are satisfied that the problem has been resolved, you will publish the amended plan, making it visible to all the stakeholders in the project. You will also update the issue to show the resolution.

As Nicole Caron, **Team Member,** you will use Project Web Access to view the tasks to which you are assigned. Your Timesheet view shows the work planned for the current week and a column for each day where you will enter actual hours against each task. You will then send your timesheet to your manager for approval.

In summary, you will work through a day in the life of an enterprise project management-oriented corporation, from the identification of a problem through its resolution.

Section 1: Executive/ Business Decision Maker (BDM)

Scott Cooper: Visibility of Up-to-Date Project Management Information

Scott Cooper, **Executive or Business Decision Maker (BDM)**, uses Project Web Access (PWA), to get a high level overview of Contoso's portfolio. Scott relies on Project Web Access to see accurate portfolio reports, making it easy to evaluate whether projects are aligned with business initiatives. As an executive, Scott's use of Project Web Access does not require knowledge of the complexities of project scheduling or of Microsoft Office Project Professional 2003. Using PWA, he has the ability to evaluate and model schedules, resources, and cost data over time and across projects to identify trends and address problem areas.

Using the Project Center, Scott will look at all the projects in the corporation by navigating through customized fields (enterprise codes) such as location and department. He will see the current status for each project and how it compares to its target schedule. Management actively uses efficiency and effectiveness metrics for decision making and for improving processes. Graphical indicators will highlight problem projects, which Scott investigates further by drilling into details and raising an issue for the appropriate resource manager to address. He also looks at some of the project risks, which have been added based on lessons learned from the past experience.

As a Business Decision Maker, Scott wants to see the resource and cost graphics on projects. Using Portfolio Analyzer, he examines resource usage and availability in spreadsheet and the graphic form for individual projects, departments, and locations, as well as for the corporation as a whole.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Introduction**	1. Change the System Date on the **host machine** to **March 1, 2005** 2. **Hold down the Right Alt key while pressing the Delete Key to** login to Windows as **Scott Cooper** using the password **p@ssw0rd**. 3. Double Click the **Project Web Access** shortcut on the desktop.	Scott Cooper is an Operations Manager for Contoso Manufacturing. He is responsible for overseeing Contoso's manufacturing engineering operations for new and existing products**.** Scott ensures Contoso's supplier capabilities are sufficient to meet current and future business needs. A goal for Scott is to reduce costs by improving manufacturing through product/process analysis. As an Operations Manager, Scott needs ready access to information to continuously monitor the progress of initiatives in his division and make timely, insightful decisions to adapt to the changing conditions.
Step 2:	1. Click the **Projects** link on the top navigation bar to open the Project Center view.	With graphical indicators, Project Professional 2003 makes it easy for Scott to identify the problem areas, like project delays

What we are going to accomplish	Keystrokes to complete	Discussion Points
Check Project Status	2. Locate the Published version of **123 Plasma Television – Manufacturing Operations** project and click the corresponding **123 Plasma Television – Manufacturing Operations project name**. 3. Select the **Contoso Project Detail** view from the **Choose a View** drop-down list located in the upper right corner). 4. Scroll down the task list until you can see the **Schedule Indicators** turn **Red**. 5. Scroll to the right in the grid and see that many of the "Red" tasks are assigned to Bradley Beck.	or cost overruns, and quickly take corrective action. While several projects have Red Schedule Indicators, Scott is particularly concerned with the Operations project, so he drills down into the project to review details of the problem. Using the graphical indicators, he sees that this project's delay starts where the indicators change from green to red. He notices that the red task Schedule indicators start in March, he looks at the Resource column and sees that many of these tasks are assigned to Bradley Beck Because he checks the Project Center regularly, he realizes that the indicator on the Project Center page recently changed to red. He decides to initiate corrective action immediately.
Step 3: **Go Deeper with the Portfolio Analyzer**	1. Click **Analyze Projects in Portfolio Analyzer** in the left pane. 2. In the **Choose a View** menu, select **Manufacturing workload by project** view. This will give Scott a view of the workload of some of his resources.	Since some tasks are being delayed, he investigates the workload on the resources. The Portfolio Analyzer is an excellent tool for gaining further insight into such issues across projects. First, Scott takes a look at a customized view called, "***Manufacturing workload by project***". This view shows that the Manufacturing – Electronics group has a resource, Bradley Beck that is over scheduled across two different projects. This **may** be why the project seems to be slipping. It also shows that other resources in the same group as Bradley are under-utilized. While this may not be the cause of the slip it is certainly a concern.
Step 4:	1. Click **Issues** and select the **123 Plasma Television –**	Having detected a problem, Scott immediately initiates corrective action. He notifies his resource manager, Mark Lee, and asks him

What we are going to accomplish	Keystrokes to complete	Discussion Points
Create Issue	**Manufacturing Operations** project. 2. Click **New Issue**. 3. Type **Resource Overloads?** For the **Issue Title**, select **Mark Lee** from the **Assigned to** list, and set **Priority** to **High**. 4. In the **Discussion** pane, type: **This project is currently scheduled late and it looks like there are some resource overloads. Please investigate and take action.** 5. Click **Save and Close** in the toolbar.	to look into this problem further and resolve it right away. He does this by creating an issue and assigning it to Mark Lee. Previous text entered in issues cannot be deleted. New text is appended to an issue so that a full record from instigation to resolution is maintained, thus making it easier to track progress on the issue and audit the history. **When the alert is set, he can be notified when the issue has been resolved, via the toolbar on the left.**
Step 5: **Conclusion**	1. Log off from Project Web Access. Log off from Windows.	Through such easy-to-use monitoring, analysis, and collaboration tools, Scott can monitor and control projects by detecting issues early on. The Project 2003 EPM solution provides a set of important features for the BDM within an organization that wants to adopt project portfolio management as a component of its executive decision support strategy.

Section 2: Resource Manager

Mark Lee: Enabling Efficient Resource Management across the Enterprise

Mark Lee is a Resource Manager at Contoso Manufacturing. He works closely with the project managers in his organization to make sure they have the right set of qualified resources to deliver their projects successfully. He also determines whether his department needs to recruit skilled staff and contractors to meet the resource demands. Mark primarily works in Outlook and Project Web Access.

Mark needs to address the issue raised by the executive. After reviewing the usage of his department's resources, he will reassign work to clear overloads. Then he will forward the issue to the Project Manager for resolution.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Intro**	1. **Hold down the Right Alt key while pressing the Delete Key to** login to Windows as Mark Lee using the password **p@ssw0rd**. 2. Click **Project Web Access** from the desktop.	Mark can access the information about project resources through Project Web Access, the Web portal to Microsoft Office Project Server 2003. With Project Web Access, he does not need to install Microsoft Office Project Professional 2003 on his computer—he just needs a Client Access License (CAL) and a Web browser.
Step 2: **Check out New Issue**	1. Note that there are new Issues assigned to you in the **Issues** section of the **Home** page. 2. Click the "Issues" link on your home page 3. Click the **Refresh** button in IE 4. Click the issue entitled: **Resource Overloads?** 5. Review Issue.	The Home page for Mark Lee has personalized information that is relevant to his role within the organization. The Project Web Access Home page brings new items to Mark's attention, including an issue just raised by the Operations Manager, Scott Cooper. In the issue, Scott mentions that the project is running late and that resources are overloaded. To investigate this further, Mark takes a look at the availability of his resources.
Step 3:	1. Click the **Projects** link on the Navigation bar.	Mark decides that he should check out the issue that Scott

What we are going to accomplish	Keystrokes to complete	Discussion Points
Check the staffing Levels of the Operations Project	2. From the list of projects highlight the **123 Plasma Television – Manufacturing Operations** project by clicking on the row marker to the left of the text. 3. Click the **Build Team** button. 4. Select **Bradley Beck**. 5. Click **Availability**. 6. See that Bradley is over allocated for all shown periods. 7. Close this page by clicking the Red X in the upper right corner.	mentions. He decides that he will look at Bradley's availability from inside the Build Team page for the Operations project in case he needs to add new resources to the project. Once in the Build Team page Mark views Bradley's Availability and sees that he is over allocated. He decides that adding an additional resource to the team might help the Project Manager redistribute the load.
Step 4: **Find a Resource to Add to the Team**	1. Select **Bradley Beck** from the list of resources. 2. Click the **Match** button to have Project Server find you all the resources that have the same skills as Bradley. 3. Nicole Caron's name appears in the box on the left. 4. Select her name. 5. Click **View Availability**. 6. You can see from the graphs that during the periods when Bradley is over allocated, Nicole has no work assigned at all. She would likely make a good addition to the team to take over some of Bradley's work. 7. Close the **View Availability** page. 8. Click the **Add** button to add Nicole to the Project Team. 9. Click the **Save Changes** button.	Mark can use the Match functionality in this page to find a resource that has the same skills as Bradley. He can then view that resource's availability to see if they might be a good match for helping the Project Manager of this project distribute the workload now assigned to Bradley.
Step 5:	1. Click the **Issues** Link in the Top Navigation bar.	By assigning and updating issues, Project Web Access enables

What we are going to accomplish	Keystrokes to complete	Discussion Points
Update Issues	2. Select the **123 Plasma Television – Manufacturing Operations** project and click **Track Project Issues** from the left pane. 3. Click the **Resource Overloads** issue, and then click **Edit Issue**. 4. Choose **Ben Smith** (the Project Manager for this project) from the **Assigned to** list. 5. In the **Resolution** area type **Added another resource, Nicole Caron, to the team. Bradley looks pretty overbooked in late March\April. This should let you give Bradley a break and distribute some of his work to Nicole.** 6. Click **Save and Close** on the toolbar.	collaboration between different stakeholders of the project. Mark now updates the issue created by the Operations Manager by appending a comment explaining his diagnosis and the solution to the problem. He also assigns the issue to Ben Smith, who is the Project Manager for the **123 Plasma Television – Manufacturing Operations** project. Ben will automatically receive an email notification regarding this issue. Mark was able to act on Scott's instructions and initiate corrective action to address the problem and communicate the changes to management and other stakeholders.
Step 6; **Log Off**	1. Log off from Project Web Access and Windows.	Confident that his remedy will clear the immediate problem, Mark logs off.

Section 3: Project Manager

Ben Smith: Insightful allocation of resources and adapting project plans to changing conditions.

You will next fill the role of Ben Smith, **Project Manager**, and will be alerted on a new issue in Project Web Access. You will open a project in Project Professional from an enterprise template and assign resources to help distribute some of the workload. When you are satisfied that the problem has been resolved, you will publish the amended plan, making it visible to all the stakeholders in the project. You will also update the issue to show the resolution.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Intro**	1. **Hold down the Right Alt key while pressing the Delete Key to** login to Windows as **Ben Smith** using the password **p@ssw0rd**.	Ben Smith is a **Project Manager** for Contoso**.** As the project manager, he is responsible for overseeing and completing projects, sometimes coordinating with other project managers and resource managers in his organization. He is particularly concerned about tracking the progress of his projects, since he is evaluated by his manager on whether he is meeting his target schedule and budget. To keep his project plans current, Mark relies on regular updates from his team members.
Step 2: **View Issue in PWA**	1. Start **Project Web Access**. 2. Notice that you have 2 Issues assigned to you in the **123 Plasma Television – Manufacturing Operations** project. 3. Click the link for these issues. 4. Click the Refresh button in IE 5. Click Issue: **Resource Overloads?** 6. Review Issue. 7. Notice that Mark has added a new resource to your team. You decide to open the project into Project Professional and have a look.	As Ben Smith, you see that the Home page shows the current status of a new issue. The issue informs Ben that a new resource has been added to the team, but the resource has not been assigned to any specific tasks. Therefore, changes have not been published yet to the affected team members.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 3: **Open the Project**	1. Click on the **Projects** button. 2. In the list of Projects highlight the **123 Plasma Television – Manufacturing Operations** project by clicking on the row marker to the left of the text. 3. Click the **Open** button to open the project into Project Professional.	As a project manager, Ben needs the full capabilities of Microsoft Office Project Professional 2003 for detailed project planning and scheduling. Ben opens the project plan and checks it out to prevent anyone else from making changes to the project while he is working on it.
Step 4: **Distribute workload**	1. Click **View** → **Tracking Gantt**. 2. Scroll down until you see the Schedule Indicator showing red. 3. You see that Tasks 71 and 72 and then Tasks 74 and 75 both assigned to Bradley at 100% during the period when Mark said he was over booked (task 75 will appear red) 4. Select the Task 71 and while holding down the Ctrl key also select Task 74. From the **Tools** menu click **Assign Resources**. 5. Select **Bradley Beck** and click **Replace**. Select **Nicole Caron** and click **OK**. 6. Now notice that Task 75's task bar (the red bar) is twice as long as its baseline bar (the grey bar). This means that it is scheduled to take twice as long as scheduled originally.	You now assign Nicole Caron to some Bradley Beck's tasks, distributing the work across more resources brings the project back on schedule. While Ben was checking on Bradley's over allocation he noticed that the real reason the project is behind schedule is that one of Bradley's tasks (Task 75) is currently set to take twice as long as originally scheduled. Adding another resource to this task will bring the project back on schedule.
Step 5: **Assign Additional resources**	1. Select the **Complete Customer Trial Monitoring** (Task 75) task. 2. Click **Tools** and select the **Assign Resources** tool. Select **George Li** and click **Assign**. 3. Click **Close**. 4. Notice that the schedule indicators are now green again.	Task 75 is 20 days past its baseline finish and this is pushing out the finish date of the entire project. This might have been the result of a scope change that was not adjusted for when it occurred. George Li is on the team and is available for this time period. Assigning George has an immediate impact, turning many Schedule Indicators green. Most importantly, the Schedule Indicator alongside the project summary task is now green, thus

What we are going to accomplish	Keystrokes to complete	Discussion Points
		indicating that the project finish date is back within the baseline.
Step 6: **Publish the Changes**	1. On the **Collaborate** menu, select **Publish**, and then click **New and Changed Assignments**. 2. Click **OK** to save the Project. 3. Click **OK** for the update to be sent to the removed resources. 4. In the **Publish New and Changed Assignments** dialog box, select **Notify all resources via email**. 5. Click **OK** to publish the assignments. 6. When publishing is complete **Close** Project Professional.	Having identified an effective solution to the problem, Ben wants to communicate the changes to the team members and other stakeholders. He can communicate these changes by accessing Project Web Access from within Project Professional. The team members will see these assignments the next time they log on to Project Web Access. However, he wants to immediately communicate these changes to team members by sending them e-mail notifications.
Step 7: **Update the Issue**	1. Back in the Project Center, click **Issues** and select the **123 Plasma Television – Manufacturing Operations project.** Click the **Resource Overloads** issue, and then click **Edit Issue**.	Ben can append a comment explaining how the issue has been resolved and assign it to Scott Cooper, the originator.

What we are going to accomplish	Keystrokes to complete	Discussion Points
	2. Choose **Scott Cooper** from the **Assigned to** list and change the status to **Closed**. 3. In the **Resolution** area type **Assigned added team member, Nicole Caron, to clear the over allocation and added George Li to a late task to bring the schedule back on track.** 4. Click **Save and Close** on the toolbar.	Ben can effectively communicate with his team members and senior management and keep everyone informed of the changes.
Step 8: **Check Status**	1. Click the **Projects** link to view the Project Center view.	To confirm that the issue really has been resolved successfully, Ben returns to the Project Center to check the status of the graphical indicators. The Schedule indicator for the 1**123 Plasma Television – Manufacturing Operations** project is now green.
Step 9: **Log off**	1. Log off from Project Web Access and Windows.	The Project 2003 solution for EPM enables project managers to work more efficiently. The project manager can use the features in Project Web Access as well as Project 2003 Professional to manage and control projects, manage teams, and manage project issues and risks. It provides a framework for effective project communication. The Project EPM solution is a comprehensive tool for project managers with additional responsibilities of resource and program management.

Section 4: Team Member

Nicole Caron: Ensuring Effective Team Collaboration

As Nicole Caron, **Team Member**, you will use Project Web Access to view the tasks to which you are assigned. The alternative Gantt Chart view shows your tasks in a time format. Your Timesheet view shows the work planned for the current week and a column for each day where you will enter actual hours against each task. You will then send your timesheet to your manager for approval.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Intro**	1. **Hold down the Right Alt key while pressing the Delete Key to** login to Windows as **Nicole Caron** with the password: **p@ssw0rd**.	Nicole Caron is a team member who was just assigned new tasks. As a team member, Nicole is concerned about managing and coordinating her work for the various projects on which she works.
Step 2: **View Timesheet**	1. Start **Project Web Access**. 2. Click the **2 new tasks** link under the **Tasks** section. 3. Click the **Timesheet** view. 4. Notice that Nicole now has an assignment to the **123 Plasma Television – Manufacturing Operations** project.	
Step 3: **Report hours**	1. Scroll back in time one week to enter your time for last week. 2. In the **Manufacturing Finance** project find the **Contract Suppliers** task. 3. Type **8 hours Actual Work** each day for this task.	Now that Nicole is working on the project she will report her actual hours worked and estimate of remaining work on this timesheet. This ensures that the schedule is maintained as a living model showing how the project will be completed.
Step 4:	1. For that same task change the **24** hours of **Remaining Work** to read **0**. This will tell the PM that the task is	When she reports actual work on an assignment, Project deducts this from the scheduled work and displays the calculated values

What we are going to accomplish	Keystrokes to complete	Discussion Points
Update estimates of scheduled work	complete and took less time than he had scheduled. 2. Click **Update All**.	of *Remaining Work* and *% Work Complete*. She can update her estimate of remaining work for assignments at any time. If she reports remaining work as zero, then the assignment is marked as complete by a check that appears in the indicator column.
Step 5: **Submit time to an Administrative Project**	1. Scroll forward on week in time. 2. Type **8 hours Actual Work** on the **Friday** of the week against the **Vacation** task in the **Taiwan Administrative** project to show you will be out of the office on Friday.	As well as reporting time against assignments from her project manager, Nicole can report time against administrative tasks, such as meetings, and non-working tasks, such as Vacation and Sick. The time reported reduces her availability and is included in OLAP reports. Accurate reporting of time through timesheets is encouraged at Contoso because it is such a useful source of data for better estimates of future projects.
Step 6: **Update all tasks**	1. Click **Update All**. 2. Click **OK** to confirm updates sent to the project manager for approval.	Nicole can frequently submit all changes to the project managers of the projects on which she works.
Step 7: **Log Off**	1. **Log off** from Project Web Access and Windows.	

Section 5: Shutting Down
Please close Virtual PC so that the machine you are on can be reset for the next person

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Close Virtual PC**	1. Close Virtual PC using either the Action | Close menu item or the X in the upper right corner. 2. Virtual PC will automatically reset the image for the next user.	

Lab 2: Project Data Service (PDS) Developer Walkthrough

Scenario: Resource Data Maintenance – Creating Resources

This lab will step you through the process of using the PDS to perform various actions on a Project Server installation. These actions include checking out the Enterprise Resource Pool, adding a new resource, editing resource information and adding a new project. The lab will use the PDSTest utility that is available as part of the Project Server 2003 Software Development Kit. It allows you to send PDS method directly to the server. Doing this you can test the specific PDS methods you wish to use in your application before running them in your code.

The scenario you will walk through is that you have been asked to create a program that can (nightly) read resource information as provided by your Human Resources system and create the resources in Project Server (or update the enterprise attributes of the resources if they already exists).

After studying the PDS compiled help document you think you have a set of method calls that will create a new resource and set some Outline code values for that resource. The sections below will walk you through the process of using the PDSTest utility to test these methods and verify in the PWA user interface that the methods worked.

Check Out the Enterprise Pool

You cannot add resources or edit resource data unless your application has the Enterprise Pool checked out. If your application will be editing or adding resources then it must check out the Pool.

What we are going to accomplish	Keystrokes to complete
Login to Windows	4. Press & Hold “Right-Alt & Delete” to start the lab. 5. **Log** on to Windows as **Scott Cooper** using the password **p@ssw0rd**.
Open the PDSTest Tool	6. Open the folder on the desktop called “Lab Links” 7. Double-click on “Shortcut to PDSTest.exe”
Run the ProjectsCheckout Method to check out the Pool	3. Select “<Request><PDSInfo></PDSInfo></Request>” 4. In the bottom window in the utility delete the current entry and paste in the code below:

What we are going to accomplish	Keystrokes to complete
	<Request> <ProjectsCheckout> <Project> <ProjectType>3</ProjectType> </Project> </ProjectsCheckout> </Request> 5. Click **Execute** 6. When prompted for a username and password enter **Administrator** for the username and **p@ssw0rd** for the password. 7. Click **OK** 8. You will see a new dialog appear that contains the following text: <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> This reply from the PDS notifies you that your request was processed successfully. You now have the Resource Pool checked out for editing. 9. Click Close to close this window
Verify the Pool is checked out.	1. In the folder on the desktop called “Lab Links” double click on the **PWA Admin Login** link 2. Login as **Administrator** with the password **p@ssw0rd** 3. Click **Admin** 4. Click **Manage Enterprise Features** 5. Click **Check in Enterprise Projects** 6. You can see that the project called **resglobal** is checked out to the Administrator

What we are going to accomplish	Keystrokes to complete
	7. Leave PWA open

Check to see if the Resource Already Exists
Before creating a new resource it is a good practice to see if the resource already exists in the Pool. To do this you use the method called ResourceStatus. This method returns an xml list of all the resources in the Pool. Your application would then examine this xml to see if the resource you are about to create is already listed. If it is NOT then you would proceed with the addition of the resource. The name of the new resource we want to add is Dell Griffith.

What we are going to accomplish	Keystrokes to complete
Execute the ResourceStatus method	1. Switch back to the PDSTest application 2. Delete the previous method code from the window in the PDSTest utility 3. Paste the code below into the window: <Request> <ResourcesStatus> </ResourcesStatus> </Request> 4. Click **Execute** 5. The Response window will come up with a very long xml string. The string starts as shown below: <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> <ResourcesStatus> <Count>255</Count> <ResourceStatus> <ResourceUID>1</ResourceUID> <ResourceName>A. Francesca Leonetti </ResourceName>

What we are going to accomplish	Keystrokes to complete
	<IsWork>1</IsWork> <IsActive>1</IsActive> <IsGeneric>0</IsGeneric> <ResourceCheckedOut>0</ResourceCheckedOut> <LastModified>20031201142151</LastModified> <ResourceUserWrite>1</ResourceUserWrite> <ReplyStatus>0</ReplyStatus> </ResourceStatus> Your application would, with this xml, be able to parse through the current resources in the pool to check to see if the one it will be adding already exists. For the purposes of this lab you can assume that it does not exist. 6. Click **Close** to close the Response dialog.

Verify that the New Resource Name does not contain invalid characters
Project Server has limitations on what characters a resource name is allowed to contain. It is a good practice to test the new resource name using a method called ResourcesCheck. This method will test the name it is given to see that it contains only valid characters.

What we are going to accomplish	Keystrokes to complete
Execute the ResourcesCheck Method	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following code into the window <Request> <ResourcesCheck> <Resource> <ResourceName>Dell Griffith</ResourceName> </Resource> </ResourcesCheck> </Request> 3. Click **Execute** 4. The Response dialog will appear and display the following response: <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> 5. This response means that the name provided passed the test and does not contain invalid characters. 6. Click **Close** to close the Response dialog

Adding the Resource
Now that we have done the preliminary work of checking out the Enterprise Pool, verifying that the resource does not exist and that the new name is valid we can now use the ResourcesAdd method to create the resource.

What we are going to accomplish	Keystrokes to complete
Execute the ResourcesAdd method to add a new resource	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following code into the window <Request> <ResourcesAdd> <Resources> <Resource> <Name>Dell Griffith</Name> </Resource> </Resources> </ResourcesAdd> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following response: <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> <ResourcesAdd> <Resources> <Resource>

What we are going to accomplish	Keystrokes to complete
	<Name>Dell Griffith</Name> <ResourceUID>256</ResourceUID> </Resource> </Resources> </ResourcesAdd> </Reply> 5. This response verifies that the resource was added and also returns the ResourceUID for the new resource 6. Click **Close** to close the Response dialog
Verify that the Resource was Added	1. In PWA Click the **Resources** link 2. The current view is **Resources Summary** and it is grouped by the RBS field. The top grouping is the one for those resources with no RBS value. In this grouping is **Dell Griffith** (Unique ID = 256) 3. Leave PWA Open

Examine the Current Outline Code values for the new resource
The next step in the process for our application is to set some Outline Code values. But before we can do that it is a good practice to check and see what the current values are for these fields. The ResourceCodeValues method can be used to return an xml document that contains the current state of all the Outline Codes for a specific resource.

What we are going to accomplish	Keystrokes to complete
Execute the ResourceCode Values Method	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following code into the window: <Request> <ResourceCodeValues> <ResourceUID>256</ResourceUID> <IncludeValueLists>0</IncludeValueLists> <IncludeCodeDetails>0</IncludeCodeDetails> <IncludeRCMV>0</IncludeRCMV> </ResourceCodeValues> </Request> 3. Click **Execute** 4. The Response dialog will come up with a response that begins with the following: <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> <ResourceCodeValues> <ResourceUID>256</ResourceUID> <ResourceName>Dell Griffith</ResourceName>

What we are going to accomplish	Keystrokes to complete
	<ResourceCheckedOut>0</ResourceCheckedOut> <ResourceCheckedOutUser>Administrator</ResourceCheckedOutUser> <CurrencySymbol/> <CurrencyPosition>0</CurrencyPosition> <CurrencyDigits>2</CurrencyDigits> <Columns> ... 5. This XML contains the current values for the new resource for all the Enterprise Resource Outline Codes. Your application, at this point, would parse through this to verify that the edits to these values it is about to make are necessary. 6. Click **Close** to close the Response dialog

Check out the Resource
You have verified that the Outline Code edits need to be made so you must now check out the resource so you can edit it. You are required to check out the resource so that Project Server can be sure that only one user\application is editing this resource at a time.

What we are going to accomplish	Keystrokes to complete
Execute the ResourcesCheckout Method	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following code into the window <Request> <ResourcesCheckout> <Resource> <ResourceUID>256</ResourceUID> </Resource> </ResourcesCheckout> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following response <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> 5. As we have seen before this response indicates that the resource is checked out and ready for editing 6. Click **Close** to close the Response dialog

What we are going to accomplish	Keystrokes to complete
Verify that the Resource is checked out	1. In PWA click **Admin** 2. Click **Manage Enterprise Features** 3. Click **Check in Enterprise Resources** (located in the left hand menu bar) 4. Notice that **Dell Griffith** is checked out.

Set the “Skills” Resource Outline Code
You need to change this resource’s skill to **Technical.IT.Testing**. The method for editing a code value requires you to tell it the FieldID of the field you wish to edit. The FieldID for the **Skills** Outline code is 205521520. You also need to tell it the UID of the lookup table value you wish to change it to. The UID for the **Technical.IT.Testing** value is 65.

What we are going to accomplish	Keystrokes to complete
1: Execute the ResourceCode ValuesUpdate Method	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following Code into the window <Request> <ResourceCodeValuesUpdate> <ResourceUID>256</ResourceUID> <Columns> <Column> <UID>205521520</UID> <ValueUID>65</ValueUID> </Column> </Columns> </ResourceCodeValuesUpdate> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following response <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS>

What we are going to accomplish	Keystrokes to complete
	<UserName>Administrator</UserName> </Reply> 5. This indicates that the request to change the value of the outline code was successful 6. Click **Close** to close the response dialog

Set the “RBS” Resource Outline Code
You need to change this resource’s **RBS** value to **USA.West.Utah.Salt Lake City**. You will do this in the same way that you must set the value of the **Skill** field. The UID for the **RBS** field is 205521540 and the ValueUID for Salt Lake City is 158.

What we are going to accomplish	Keystrokes to complete
Execute the ResourceCode ValuesUpdate Method	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following Code into the window <Request> <ResourceCodeValuesUpdate> <ResourceUID>256</ResourceUID> <Columns> <Column> <UID>205521540</UID> <ValueUID>158</ValueUID> </Column> </Columns> </ResourceCodeValuesUpdate> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following response <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS>

What we are going to accomplish	Keystrokes to complete
	<UserName>Administrator</UserName> </Reply> 5. This indicates that the request to change the value of the outline code was successful 6. Click **Close** to close the response dialog

Check the Resource in and Check in the Enterprise Pool
Now that you have finished editing the resource you will need to check it back in so that if other users or applications need to edit it's data the resource will not be locked. If your application is also finished editing resources it should check in the Enterprise Resource Pool as well.

What we are going to accomplish	Keystrokes to complete
Check in the Resource	1. Delete the previous method code from the window in the PDSTest utility 2. Paste in the following Code <Request> <ResourcesCheckin> <Resource> <ResourceUID>256</ResourceUID> </Resource> </ResourcesCheckin> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following response. <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> 5. The resource is now checked in. 6. Click **Close** to close the Response dialog

What we are going to accomplish	Keystrokes to complete
Check in the Enterprise Pool	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following code into the window <Request> <ProjectsCheckin> <Project> <ProjectType>3</ProjectType> </Project> </ProjectsCheckin> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following: <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> 5. The Enterprise Pool is now checked in 6. Click **Close** to close the Response dialog
Verify that the Code Value was changed	1. In PWA Click **Resources** 2. Find **Dell Griffith** in the list. The view is grouped by the RBS field so scroll down until you find the **USA.West.Utah.Salt Lake City** group. 3. Note the value **Technical.IT.Tester** in the **Skills** field

Scenario: Data Maintenance – Misc. Maintenance

In addition to the Resource creation and field editing abilities that we have seen thus far in the lab, the PDS also allows for other editing of user information. This section shows how users can be added to or removed from Project Server Security groups.

Adding Users to Groups

Once your application adds a resource\user it may need to add them to specific user groups.

What we are going to accomplish	Keystrokes to complete
Add a User to a Security Group	1. Delete the previous method code from the window in the PDSTest utility 2. Paste the following code into the window <Request> <PSAddUsersToGroups> <PSUsers> <PSUserName>Dell Griffith</PSUserName> </PSUsers> <PSGroups> <PSGroupName>Project Managers</PSGroupName> </PSGroups> </PSAddUsersToGroups> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following Response:

What we are going to accomplish	Keystrokes to complete
	<Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> 5. The user we created in the previous section is now a member of the Project Managers group 6. Click **Close**
Verify the user was added to the Group	1. In PWA Click **Admin** 2. Click **Manage Users and Groups** 3. Select **Dell Griffith** in the list 4. In the field called **Groups** in the lower part of the screen verify that **Project Managers** appears

Removing a User from a Group
Your application may need to remove a user from a group. The method below removes our new user from the Team Members group.

What we are going to accomplish	Keystrokes to complete
Remove a user from a Security Group	1. Delete the previous method code from the window in the PDSTest utility 2. Paste this code into the window <Request> <PSDeleteUsersFromGroups> <PSUsers> <PSUserName>Dell Griffith</PSUserName> </PSUsers> <PSGroups> <PSGroupName>Team Members</PSGroupName> </PSGroups> </PSDeleteUsersFromGroups> </Request> 3. Click **Execute** 4. The Response dialog will come up with the following <Reply> <HRESULT>0</HRESULT> <STATUS>0</STATUS> <UserName>Administrator</UserName> </Reply> 5. The user has now been removed from the Team Members Group

What we are going to accomplish	Keystrokes to complete
	6. Click **Close**
Verify the user was added to the Group	1. In PWA Click **Admin** 2. Click **Manage Users and Groups** 3. Select **Dell Griffith** in the list 4. In the field called **Groups** in the lower part of the screen verify that **Team Members** no longer appears in the list

Review and Conclusion

This lab has walked you through the process of testing various resource and user creation\maintenance functions within the PDS. We used the PDSTest utility to test the PDS methods required to:

- Check out the Enterprise Resource Pool
- Check on the existence of a specific Resoruce
- Create a new resource
- Check out a resource
- Set Enterprise Resource Outline Code values for the resource
- Check in the resource
- Add a user to a security group
- Remove a user from a security group

We have also seen how the PDSTest utility is a powerful tool for developers that are writing applications that use the PDS to work with Project Server data. It's power comes from it's ease of use and that it gives developers a quick way to test their PDS calls against a database without having to compile and run their actual application.

Shutting Down
Please close Virtual PC so that the machine you are on can be reset for the next person

What we are going to accomplish	Keystrokes to complete
1: **Close Virtual PC**	3. Close Virtual PC using either the Action | Close menu item or the X in the upper right corner (if the VPC is running in full screen mode, select alt+enter to access the close button) 4. Virtual PC will automatically reset the image for the next user.

Lab 3: Project Server Administration

Overview
This lab will walk you through the steps to perform several of the most common actions taken by an Administrator of a Project Server system. While this is by no means a complete list of the things that an administrator will do on a system it is representative of some of the more common things that are done by an administrator.

Section 1: Adding a New Resource
If your organization chooses not to use the Active Directory synchronization with the Enterprise Resource Pool you will likely be asked to add new resources as your deployment grows to encompass new organizations or as new employees get added to your company. This section shows you the steps involved in adding new resources to the Enterprise Pool.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 2: **Login to Windows**	6. **Log** on to Windows as **Scott Cooper** using the password **p@ssw0rd**.	The Administrator for Project Server is not a Windows authenticated account. The Administrator can log in regardless of which Windows user is logged in.
Step 3: **Open Project Professional and connect to Project Server**	8. Double click on the **Project Professional 2003** shortcut on the desktop 9. Double-Click on the **Administrator** account in the dialog 10. Enter the password **p@ssw0rd**	The work that the Administrator does with Resources, Enterprise custom fields and Enterprise Views all takes place in Project Professional.
Step 4: **Open the Enterprise Resource Pool**	10. Click **Tools | Enterprise Options | Open Enterprise Resource Pool** 11. Click the **Open/Add** button	This opens the Enterprise Pool in a mode that does not check out any of the existing resources but does let the administrator add new resources. Had the administrator checked the box next to any of the resources that resource would have been checked out to the administrator.

Step 5: **Enter the New Resource's Information**	6. Enter **Bill Stevens** in the Resource Name field 7. Double-Click the resource to open the Resource Information dialog 8. Click on the **Custom Fields** Tab 9. Enter values for the Outline Codes and fields for this resource 10. Click **OK**	Entering a new Name here creates a new Enterprise resource. The Custom Fields tab of the Resource Information dialog provides a single page that shows all the Enterprise Resource custom fields and outline codes. This is the easiest place to edit resource outline codes and custom fields.
Step 6: **Close and Save**	2. Click **File | Exit** 3. Click **Yes** to save the changes to the Enterprise Resource Pool.	The new resource has been added to the Enterprise Pool and has also been added to Project Server as a User to the Team Members group. Clicking File | Exit closes the Pool and closes Project Professional

Section 2: Edit a Resource

Editing resource information is a common task of the administrator or of the Resource Managers. Details about a resource change often whether it is the organization to which they belong or a change in the number of level of skills they possess. This section shows you how to check a single resource out of the pool so their details can be edited.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Open Project Professional and connect to Project Server**	7. Double click on the **Project Professional 2003** shortcut on the desktop 8. Double-Click on the **Administrator** account in the dialog 9. Enter the password **p@ssw0rd**	Checking this box and clicking the Open/Add button checks this resource out to YOU. While you have this resource checked out no other administrator or resource manager will be able to edit the details of this resource.
Step 2: **Open the Pool and Check out a Specific Resource**	1. Click **Tools | Enterprise Options | Open Enterprise Resource Pool** 2. Scroll down to find **Bill Stevens** in the list 3. Fill the check box to the left of Bill 4. Click **Open/Add** button	
Step 3: **Edit Resource Details**	1. Double click on the resource to open the Resource Information dialog. 2. Select the **Custom Fields** tab 3. Change the **RBS** field value and any other values you wish to edit. 4. Click **OK** when you are finished.	As you are editing these values remember that edits you make here effect how the resource will appear in reports and how the system 'sees' this resources. The RBS for instance effects how this resource is able to interact with the projects and resources within Project Server and how other users that manage this resource can interact with projects and with this resource. When editing the RBS value take special care to make sure there are no mistakes.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 4: **Close and Save**	1. Click **File | Close** 2. Click **Yes** to save the changes to the Enterprise Resource Pool, close Project Professional	

Section 3: Work with Enterprise Outline Codes
As an administrator on a Project Server system you WILL be asked to make adjustments to or add new Enterprise Outline Codes. No matter how good the pre-deployment analysis is in it's definition of outline codes there will be changes. Project managers or executives will decide that there needs to be a new item in the lookup table or they will decide they need a new code to capture some new property of a project or resource. This section will show you the steps involved with a basic edit to an existing code and also the addition of a new code.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Open Project Professional and connect to Project Server**	7. Double click on the **Project Professional 2003** shortcut on the desktop 8. Double-Click on the **Administrator** account in the dialog 9. Enter the password **p@ssw0rd**	Checking this box and clicking the Open/Add button checks this resource out to YOU. While you have this resource checked out no other administrator or resource manager will be able to edit the details of this resource.
Step 2: **Open the Enterprise Global**	1. Click **Tools | Enterprise Options | Open Enterprise Global**	Any edits to Enterprise custom fields or outline codes much be done within Project Pro while the Enterprise Global template it checked out.
Step 3: **Edit the Sponsor Lookup Table**	1. Click **Tools | Customize | Enterprise Fields** 2. Select the **Custom Outline Codes** Tab 3. Click the **Projects** radio button 4. Select the **Sponsor** Outline Code 5. Click the **Edit Lookup Table** button 6. Scroll down to the bottom of the list and select the space just below Miscellaneous Products. 7. Type **Operations Management** 8. Click **Close**	The editing of Outline codes and other enterprise custom fields is done within the Enterprise Fields dialog. This step has you adding a new value to the lookup table for the Sponsor outline code.

Step 4: **Create a New Outline Code**	1. Select **Enterprise Project Outline Code 5** 2. Click the **Rename** button 3. Enter **Strategic Alignment** 4. Click **OK**	Renaming the code is always a good idea. Give it a name that will immediately tell users exactly what it is for. Avoid abbreviations if possible. If you must use them or use acronyms make sure that all involved parties know their meaning. Strategic Alignment is an important concept in Portfolio Management as it allows organizations to track how project spending tracks to the different goals of the organization
Step 5: **Define Code Mask**	1. Click **Define Code Mask** 2. From the drop down list under the **Sequence** field select **Characters** 3. Click **OK**	The code mask helps validate that the values in the lookup table conform to a specific format. For this code we will be allowing any characters so we will select Characters and then accepting the defaults for the other fields.
Step 6: **Edit the Lookup Table**	1. Click **Edit Lookup Table** 2. Type: **Improve Customer Satisfaction** 3. Press **Enter** 4. Type: **Increase Marketshare** 5. Press **Enter** 6. Type: **Develop Industry Leading Technology** 7. Press **Enter** 8. Click **Close**	The Lookup table is the list of values that users will see when filling in this field for projects. For our example we will be entering several organizational strategic goals to which projects will be aligned. These will be the choices that Project Managers will have when entering new projects.
Step 7: **Make New Code Required**	1. Check the box marked **Make this a Required Code** 2. Click **OK**	Some codes need to be filled in for every project or resource. This check box tells Project Server to require a value for this field for each project that is saved to the server.

Section 4: Add an Enterprise View to Project Professional
Enterprise Views within Project Professional allow you as the administrator to make sure that every project manager has access to the same views for every project, regardless of how they have customized the views within each project. Enterprise views are stored in the Enterprise Global template and cannot be edited or deleted by project managers. This ensures that all project managers have access

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Create New View**	1. While you still have the Enterprise Global open in Project Professional click the **View | More** menu 2. Select the **Tracking Gantt** view from the list 3. Click the **Copy** button 4. In the Name field type **Enterprise Tracking** 5. In the Table field choose the **Enterprise Entry** table 6. Click **OK** 7. Click **Close**	It is important to name your enterprise views in a way that will distinguish them from the views contained in normal projects. In this case we are creating a copy of the Tracking Gantt
Step 2: **Close and Save**	1. Click **File | Exit** 2. Click **Yes** to save changes to the Enterprise Global	

Section 5: Edit a Group

Lets say that it has been determined that Project Managers should not be allowed to save baselines for their projects. By default the Project Managers security group has this permission so we will need to edit the default permissions to remove this ability from this group. This section will show you how to edit the state of a global setting for a specific security group.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Login to PWA as the Administrator**	1. Open the folder on the desktop called **Lab Links** 2. Double click on the shortcut called **PWA Admin Login** 3. In the User Name field type: **Administrator** 4. In the Password field type: **p@ssw0rd**	Edits to groups are done within Project Web Access. You need to be logged in as the Administrator to make these changes. This shortcut will take you to the login page.
Step 2: **Navigate to the Groups page**	1. Click the **Admin** link on the top navigation bar 2. Click the **Manage Users and Groups** link 3. Click the **Groups** link (in the left menu bar)	The Groups page gives you access to all the security groups in Project Server
Step 3: **Open Modify Group page for the Project Managers group**	1. Select the **Project Managers** group from the list 2. Click the **Modify Group** button on the toolbar	We want to edit the Project Managers group to edit this permission

Step 4: **Edit a Global Permission**	1. In the **Global Permissions** section scroll down to the **Save Baseline** permission 2. Uncheck the **Allow** permission for Save Baseline	This permission controls if users of the current group can save baselines within Project Professional.
Step 5: **Save Changes**	1. Click the **Save Changes** button 2. Click **OK** on the confirmation dialog	

Section 6: Edit a Category

The current state of the settings in the My Projects Category on our Lab machine says that users that are associated with this category can see projects they manage as well as projects they are team members on and projects managed by users they mange. This means that they could use Project Professional to open projects where they are resources and edit them and save their changes.

As administrator you will be called up on to make edits to the security settings of categories to fix small oversights like this one. This section will show you how to set this category so that it only allows its users to see projects they manage.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Navigate to the Categories Page**	1. Click the **Admin** link on the top navigation bar 2. Click the **Manage Security** link	
Step 2: **Open the My Projects Category**	1. Select the **My Projects** category from the list 2. Click the **Modify Category** button on the toolbar	
Step 3: **Modify the Category Security Settings**	1. In the Projects Section of the Modify Category page uncheck the **Allow users in this category to view all projects in which they are a team member** permission. 2. Also uncheck the **Allow users in this category to view all projects assigned to resources that they manage** permission	These two permissions give users of this category the permissions listed in the Permissions section of this page for all projects where the user is a team member and for all projects that are managed by resources that the users manages. For most organizations this gives these users too many rights on these projects.
Step 4: **Save Changes**	1. Click the **Save Changes** button 2. Click **OK** on the confirmation dialog	

Section 7: Create a View

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Navigate to the Specify Views Page**	1. Click the **Admin** Link on the Top Navigation bar 2. Click **Manage Views**	
Step 2: **Create a New View**	1. Click the **Add View** button on the toolbar 2. Select the **Portfolio Analyzer** radio button 3. In the **Name** field type: **Sample View** 4. Click on the "Field List" icon located on the toolbar above the control. From the **Pivot Table Field List** dialog drag the **Availability** Total onto the Yellow area of the control 5. Now drag the **Work** total into the same location on the control. 6. Drag the **Month** (under the Time Section) Dimension onto the Row area of the control 7. Now Drag the **Level 3** of the **Resource Department** Dimension and drop it to the right of the Month 8. Now drag **Level 4** of the **Resource Department** Dimension to the right of **Level 3**	You now have a view that shows Availability and Work graphed by month with the ability to drill into a month and see the numbers for each department.
Step 3:	1. In the **Categories** section of the page select the Categories that should have permissions to see this view	

What we are going to accomplish	Keystrokes to complete	Discussion Points
Give Permissions to your View	and then click the **Add** button	
Step 4: **Save Changes**	1. Click the **Save Changes** button 2. Click **OK** on the confirmation dialog	

Section 8: Set the Active Directory – Resource Pool Synchronization Settings
Project Server 2003 allows you to have the membership in the Enterprise Resource Pool controlled by the membership of users in a specific AD security group. Setting this up means that when the synchronization occurs, users in the AD group will be come Resources in the Enterprise Pool. This section shows you how to set this setting and specify the schedule for future synchronizations.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Navigate to the Server Configuration Page**	1. Click the **Admin** link on the Top Navigation bar 2. Click the **Server Configuration** link	
Step 2: **Set the AD Group**	1. In the **Active Directory Group to Synchronize** field type: **msdemos\project users** 2. Click **Save Changes** 3. Click **OK** on the Confirmation dialog (if it appears)	You are now setting up and establishing the active directory link between Project Server and Windows Server 2003 Active Directory
Step 3: **Update the Resource Pool**	1. Click **Server Configuration** to reenter the page 2. Click the **Update Now** button	Here you are now updating the link to import items from the Active Directory
Step 4: **Set the Schedule**	1. Click the **Update every…** radio button 2. Pick time period, start date and time 3. Click **Save Changes** 4. Click **OK** on the Confirmation dialog (if it appears)	You can setup a schedule to synchronize the active directory items with Project Server per your schedule.

Section 9: Edit OLAP Cube Build Settings

The OLAP cube is the data source inside SQL Server Analysis Services that provides data for the Portfolio Analyzer views. The data in this cube is generated from the published project and resource data in the Project Server database. Depending on the size of the database it can take anywhere from several minutes to several hours to build this cube. The schedule that defines when this cube is built is definable by you. You can also choose to build the cube manually.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Navigate to the Update resource tables and OLAP cube page**	1. Click **Admin** on the Top Navigation bar 2. Click the Manage **Enterprise Features** link	
Step 2: **Update the Cube Manually**	1. Scroll down to the bottom of the page 2. Click the **Update Now** button (This step will take about 5 mins for the cube to rebuild, please be patient)	Pressing Update Now will cause the cube to be built right now and will take (for this database) about 5 minutes. Building the cube on a production system during normal operations can cause SQL Server performance to slow down.
Step 3:	3. Select the **Update every** radio button 4. Choose a time period (Days, Weeks, Months)	Here you can establish how often you want the cube to be rebuilt.
Step 4:	1. Click the **Save Changes** button 2. Click **OK** on the confirmation dialog	

Section 10: Check in a Project

Sometimes a user will have a project open in Project Professional and a network issue can cause them to loose connectivity. Situations like this cause the Project to be 'stuck' in the checked out state. This makes it so that other users cannot open the project. As the administrator you can unlock the project. This section will show you how to unlock a locked project.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Navigate to the Check in Enterprise Projects Page**	1. Click the **Admin** link on the Top Navigation bar 2. Click **Manage Enterprise** Features 3. Click **Check in Enterprise Projects** (in the left hand menu)	
Step 2: **Check in the Project**	1. Select the **123 Plasma Television - Manufacturing Sales and Marketing** project 2. Click the **Check In** button on the toolbar 3. Click **OK** on the confirmation dialog	Remember that if you check in a project that is currently being edited by someone they will not be able to check in those changes. Always verify with the person listed in the dialog to see if they are currently editing the project.

Section 11: Change the Default Status Reporting Method

Project Server allows you to define the default tracking method as well as deciding if this default can be overridden by the project manager. This section of the lab shows you how to edit the default and how to allow project managers to change the default for their projects.

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 1: **Navigate to the Tracking Settings page**	1. Click the **Admin** link on the top navigation bar 2. Click **Customize Project Web Access**	
Step 2: **Pick the Default Method**	1. In the **Specify the default method for reporting progress on tasks** section select the tracking method you want to make the default for Project Managers	
Step 3: **Allow managers to select their own method**	1. In the **Lock down defaults** section select the **Allow project managers to change the default method for reporting progress if a different method is appropriate for a specific project** option	Now project managers will have new projects default to the method specified above but will be able to choose their own method.
Step 4: **Save Changes**	1. Click the **Save Changes** button 2. Click **OK** on the confirmation dialog	

Section 12: Shutting Down

Please close Virtual PC so that the machine you are on can be reset for the next person

What we are going to accomplish	Keystrokes to complete	Discussion Points
Step 2: **Close Virtual PC**	5. Close Virtual PC using either the Action | Close menu item or the X in the upper right corner. If you are running in full screen mode, press alt+enter to restore the window so you have access to the menu and close button 6. Virtual PC will automatically reset the image for the next user.	