

EPM Worksheet for Project Server Configuration

Configuration Tasks		Requirements Gathering
Configure Enterprise Resources		
	Adding Enterprise Resources into Enterprise Resource Pool	Is windows authentication being used? What is the maximum availability of a resource? Is (non-project) time being tracked?
	Modify Accounts in PWA to add PMs into the PM Group, Team Leads into Team Lead group, etc.	How many different user roles are required?
Customize Tracking Settings in PWA		
	Set tracking method	What data variances need to be captured (schedule, work and/or budget)? What tracking method will be used? How many working days forward can be considered 'current'?
	Set managed time periods (if necessary)	Is the organization interested in controlling time periods available for reporting? What are the maximum hours that can be logged in a day?
Modify the Enterprise Global		
	Create Enterprise Calendars	What are the standard working hours for the organization? What are the statutory holidays? Is there a requirement for more than one enterprise calendar?
	Customize Enterprise Resource Outline Codes	How does the organization want to group resources? Does the organization want to use skill mapping to generic resource?

	Create RBS	What is the project organization reporting structure?
	Modify resources to set appropriate values in RBS and customized outline codes	
	Customize Enterprise Project Outline Codes	How does the organization want to group projects for reporting?
	Create calculated fields and graphical indicators	What variance data is required? What are the baseline procedures?
	Creating Custom Project Professional Views	What tracking method is used? What variance data should the project managers watch for?
	Backup Enterprise Global	
Create Business Templates		
	Create Custom Templates (if necessary, customize Published Fields)	What type of projects will be published to the project server? Does the organization have key milestones that are tracked? Is there a standard methodology the organization follows?
	Create Administrative Projects	Is the organization interested in tracking non-project related time?
Importing Projects		
	Run Import Wizard to import projects	Is progress to date going to be migrated to the project server?
Customizing Project Server		
	Set Server Configuration	What features will be turned off globally?
	Create Versions (if using)	Does the organization want to maintain multiple versions on a single project?
	Set Email notification settings (if using)	Are reminders necessary?
	Create custom PWA Project and Resource	What variance data will portfolio managers and executives want to view? What

	views	detailed project views will help team members?
Customize Security		
	Define global group permissions	How many groups are required and what are the group's global permissions?
	Define objects belonging to Categories	How many categories of objects are required and what objects belong to each category?
	Set permissions for categories by group	What are the permissions for each group on the categories?
Setup Portfolio Analyzer		
	Create OLAP Cube	Is the reporting based on forward projections and/or historical actuals?
	Create Portfolio Analyzer Views	What variance reports are required? What Audit reports are required?