



Proposals & Activities

This document is a quick explanation of the Proposals and Activities as found in Project Server 2007.

Proposals and Activities are high level activity plans. You can think of them as “lightweight” projects. You can create tasks and link them, create resource assignments and track progress. Resources can be coded as proposed or committed which allows for high level planning.

Proposals have a “State” field, Activity Plans do not. Other than this field, they can be used interchangeably.

Some of the advantages of Proposals and Activity Plans:

- Can be created and edited without Project Professional
- Can be accessed anywhere Project Web Access is available
- Can be converted into full fledged projects and managed in Project Professional
- Provides ability to use SharePoint embedded workflow

Some limitations of Proposals and Activity Plans:

- Maximum of 100 tasks
- Can only assign one resource per task. This resource will be assigned at 100% unless you build and use a resource plan
- Can only use duration, not work
- Can only use finish to start relationships

Proposals are good to use for forward-looking planning. You may know that there’s a need for a project, but don’t have a lot of details. A Proposal could be created that listed some general high level tasks for a project. Resources can be assigned to that Proposal or a Resource Plan could be created to “propose” or “commit” resources for that future project.

Activity Plans are good to use for open-ended projects that represent ongoing work (i.e. Simple Projects, Ongoing support and maintenance, Short Projects, Operational Projects, Training, Personal Task Lists)

An alternative way to get to the New Proposal or New Activity page is to click New in the Project Center, and select either Proposal or Activity. The New Activity page can also be reached from the My Tasks page and selecting Personal Activity.



Clicking the Unlink Tasks button removes all links from the selected tasks. If a task has multiple links, and you want to remove only one of them, make a note of the links you want to keep, click Unlink Tasks, and then re-establish the necessary links.

There is no provision for adding multiple new tasks – they must be added one at a time. The initial entry screen provides space for 10 tasks. If you have a large number of tasks, entry can become tedious. Consider a SharePoint list as a template if you use a similar task list for multiple proposals or activity plans.

Before you can link documents, issues or risks to tasks, proposals, or activity plans, you must publish the proposal or activity plan and create a project workspace.

The creation of a workspace at the time a proposal or activity plan is published depends on whether project workspaces are automatically created. This is a server setting (Server Settings – Project Workspace Provisioning Settings-Automatic Provisioning).

Documents, issues and risks can be linked at either the proposal or activity plan level, or the task level.

Assigning resources directly to individual tasks:

- Have to build team first
- Impact doesn't show up in resource availability until the Proposal or Activity Plan has been published