



## Proposals in Project Server 2007

### **Summary:**

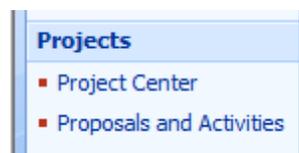
In Project Server 2007, users with the correct security permission can create a Proposal. Proposals enable a user to establish a rough project outline. A Proposal can be defined as a method to enable project initiation on the Web, so that the analytics in Project Server 2007 can be used to track potential projects. This also helps with anticipating resource needs by basing them against current project as well as potential projects.

Proposals are intended to be a place to provide the key project deliverables and resource demands. They are meant to be used as a mechanism to indicate to management what projects are needed in the future. Management can then determine the priority order of proposals that they accept or they can determine which proposals needs more information. As with normal projects, a proposal gets a SharePoint site where issues, risks and documents can be linked to the proposal.

### **How to create a Proposal**

Before you can create a proposal, you must have permissions to do so. If you are unsure if you have the correct permission, the easiest way to check is to look at your PWA (Project Web Access) home page and see if “Proposals and Activities” is listed as an option and then try to create a proposal.

The first step is to click on the link on the home page. The link is found in the Projects heading and should look like this:



After clicking on the link, a page will open that will look similar to this:

**Proposals and Activities**

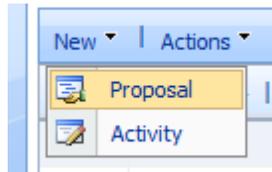
Use this page to create a project proposal or track activity, open an existing proposal or activity, or delete an obsolete proposal or activity.

New | Actions

Open Read-Only | Delete | Convert | Check In | Build Team | Resource Plan

Name	Published	Checked Out By	State	Start Date	Finish Date	Resource Plan
2007 - Corporate PHD Standard Activities	Yes			1/2/2007	1/1/2008	
2007 - Non-plant Maintenance Activities	Yes			1/2/2007	1/4/2008	Published
2007 - Plant Maintenance	Yes			1/1/2007	1/7/2008	Published
Accounts Payable Verification Process Design Test	Yes		Proposed	1/1/2007	11/16/2007	Published
Accounts Receivable Verification	Yes		Proposed	11/15/2007	6/16/2008	Published
Acquisition Database Design	Yes		Proposed	4/17/2007	9/4/2007	Published
Asa Facility Equipment Upgrade	Yes		Proposed	10/17/2007	3/20/2008	Published
Automated Processing System Implementation	Yes		Proposed	12/1/2006	5/1/2007	Draft
Automated Software Design Architecture Upgrade	Yes		Proposed	10/5/2007	3/18/2008	Published
Bug Tracking Database Design	Yes		Proposed	4/18/2007	6/18/2007	Published
Compliance DB System Implementation	Yes		Proposed	6/1/2007	7/8/2008	Published

This is the list of current Proposals and Activities and some meta-data information about them is listed in the columns. On this page, click on the down arrow next to “New” and select proposal.



This will open a new window where you can give the proposal a name, description, start date, plan owner (which defaults to your own userid), and any custom fields that are required for Projects. If you have a SharePoint list already created, then you can import that list. For this example, we assume that you do not have a SharePoint list. The New Proposal screen looks like this:

## New Proposal

Work Details
  Summary Information

<p><b>New or Import</b></p> <p>To create a new proposal or activity, select New. To create a new proposal or activity from a SharePoint list, click Import.</p>	<p> <input checked="" type="radio"/> New  <input type="radio"/> Import from SharePoint list  <input type="button" value="Select SharePoint list"/> </p>
<p><b>Name and Description</b></p> <p>Type the proposal or plan name as you want it to appear in Project Web Access views. Type descriptive text that will help users find this plan.</p>	<p>Name</p> <input type="text"/> <p>Description</p> <input type="text"/> <p>Start Date: <input type="text" value="10/8/2008"/> <input type="button" value="Calendar"/></p> <p>End Date: <input type="text"/></p>
<p><b>Plan Owner</b></p> <p>Select the owner for this proposal or activity plan.</p>	<p>Plan Owner</p> <input type="text" value="farmadmin"/>
<p><input checked="" type="checkbox"/> <b>Project Custom Fields</b></p> <p>Specify required project-level custom fields or outline codes that were created in the Customize Fields dialog box.</p>	<p>State: <input type="text"/> <input type="button" value="..."/></p> <p>Business Need: <input type="text"/></p>

After entering the required information, the proposal that was just created will open in the details view. This allows you to enter high-level tasks, durations and resources. Normally, the first step to do in this screen is to select the resources that you will use. These are the *generic* resources – job title or position, rather than a specific person – that you will need. For example, “Oracle DBA” and “Application Support Specialist” are generic resources that can be replaced later with actual resources. To select resources, click on “Build Team” and a screen like this will appear:

## Build Team: Sample Proposal

Actions ▾   Go To ▾						
View Assignments   View Availability   Synchronize to Resource Plan						
	▲ Resource Name	Type	Generic	Cost Center	Timesheet Manager	Default As
<input type="checkbox"/>	<b>Work</b>					
<input type="checkbox"/>	Ahs David	Work	No	1040 - COO	Andersen Erik	Ahs David
<input type="checkbox"/>	Allen Tony	Work	No	1040 - COO	Allen Tony	Allen Tony
<input type="checkbox"/>	Andersen Erik	Work	No	1040 - COO	Andersen Erik	Andersen Erik
<input type="checkbox"/>	Application Support Specialist	Work	Yes			
<input type="checkbox"/>	Bagel Jean Philippe	Work	No	1060 - HR	Berry Jo	Bagel Jean F
<input type="checkbox"/>	Barker Rob	Work	No	1030 - CMO	Barker Rob	Barker Rob
<input type="checkbox"/>	Beebe Ann	Work	No	1030 - CMO	Culp Scott	Beebe Ann
<input type="checkbox"/>	Bento Paula	Work	No	1040 - COO	Allen Tony	Bento Paula
<input type="checkbox"/>	Berry Jo	Work	No	1060 - HR	Berry Jo	Berry Jo

To select a resource, click on the box next to their name. To see the amount of availability or other assignments that the resource(s) may have already been assigned you can click on “View Assignments” or “View Availability” after selecting one or more resources.

After selecting the resource(s) that you will want to use, the Add button will become enabled. Click on the Add button to be able to use the resource(s) that you have selected. After clicking on Add, the resource(s) that you selected will appear on the right side of the screen.

<input type="button" value="Add &gt;"/>	<table border="1"> <thead> <tr> <th>Resource Name ▲</th> <th>Booking Type</th> </tr> </thead> <tbody> <tr> <td><input type="checkbox"/> Application Support Specialist</td> <td>Proposed</td> </tr> <tr> <td><input type="checkbox"/> Beebe Ann</td> <td>Committed</td> </tr> </tbody> </table>	Resource Name ▲	Booking Type	<input type="checkbox"/> Application Support Specialist	Proposed	<input type="checkbox"/> Beebe Ann	Committed
Resource Name ▲	Booking Type						
<input type="checkbox"/> Application Support Specialist	Proposed						
<input type="checkbox"/> Beebe Ann	Committed						
<input type="button" value="Save"/>	<input type="button" value="Cancel"/>						

After clicking on the Save button, the detail screen will appear again. Enter any high-level tasks, durations, Start Dates or milestone information as needed. You can also link tasks that are dependant upon each other. In the Resource Name column there is a drop down option that will list the resource(s) that you selected in the Build Team steps above. For this example, there are only two tasks:



## Sample Proposal

Work Details
  Summary Information

Actions | Go To |

Link Tasks | Unlink Tasks | Link Document | Build Team | Resource Plan | Delete Task | New Task

▲	Task Name	Milestone	Duration	Start Date	Finish Date	% Work Complete	Resource Name
	Sample Task One	<input type="checkbox"/>	5D	10/8/2008			Application Support Specialist
	Sample Task Two	<input type="checkbox"/>	3D	10/8/2008			Beebe Ann
		<input type="checkbox"/>					

Clicking on Save will save this proposal on the server but won't make this "visible" to others or to reports. This is the option that you should choose though as you are working on the proposal so that you don't lose your work. Clicking on Save and Publish will post the proposal to the list of Proposals on the server and make the information that you have entered "visible" to others and to reports. If editing is completed on the proposal and Save and Publish has been selected, the way to leave this screen is to click on Close.

**Note:** After creating a proposal, it must be "Checked-in". Instructions for checking in a proposal are demonstrated later in this document so if there are no documents, issues or risks being added, please skip to that section.

### Linking Documents, Adding Issues or Adding Risks

After the proposal is published it is easy to add issues, risks or documents to it through the workspace. This can be accomplished in one of two ways. First, from the Home screen of PWA, in the list of Project Workspaces, the published proposal will be listed.



### Project Workspaces

Actions ▾   Go To ▾
Project Name ▲
2007 - Corporate PMO Standard Activities
2132 Hoover Assembly Building Remodel
8023 - Local Area Network (LAN) upgrade
A Boat Show
Auto Satellite Radio Product Dev
Boat Show
Boat Show2
bobtest
CBT Implementation
Compressed Schedule for JSF-Rev D
Demo Proposal
Marine Satellite Radio Product Dev
Packaging Revision
Portable Satellite Radio Product Dev
Production Expansion Program
Sample Proposal
Satellite Products Production Line Installation

Clicking on the name of the proposal will result in a separate window opening to the default workspace screen. On the left hand side of the screen are the options for adding issues, risks or documents:

Project Web Access > Sample Proposal

## Sample Proposal

**Home**

- View All Site Content
- Documents**
  - Project Documents
- Lists**
  - Issues
  - Risks
  - Deliverables
  - Calendar
  - Tasks
- Discussions**
  - Team Discussion
- Sites**
- People and Groups**
- Recycle Bin

Microsoft Office Project Server Workspace

### Announcements

**Get Started with Windows SharePoint Services!** NEW  
by System Account  
Microsoft Windows SharePoint Services helps you to be more effective b getting started, see Help.

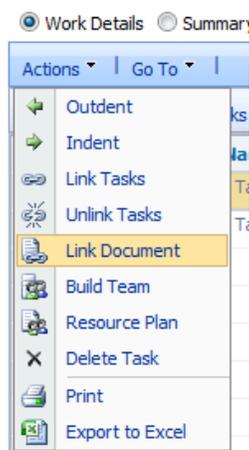
Add new announcement

### Calendar

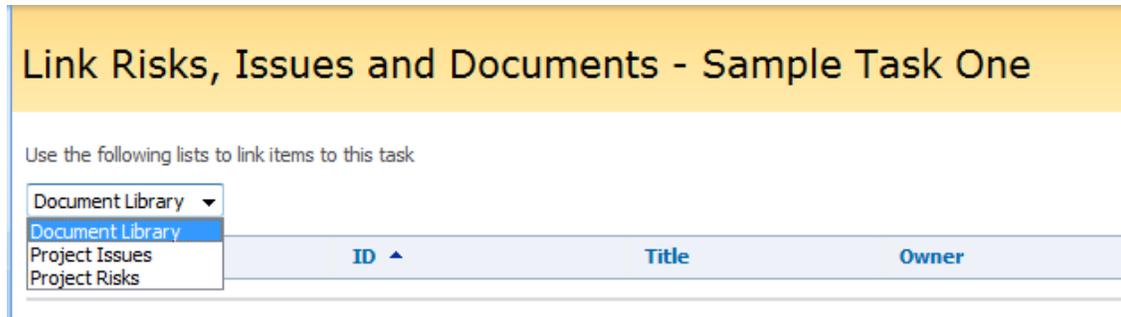
There are currently no upcoming events. To add a new event, click "Add

Add new event

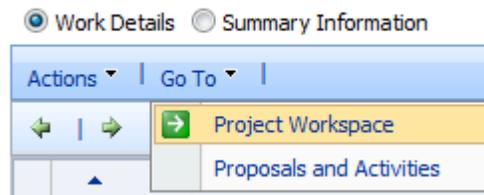
The second method is to open the proposal from the Proposal and Activities page. This opens the details screen that has the task names, durations and resources in it. From that screen there is a way to link documents, issues and risks to a specific task by first selecting a task and then by clicking on the arrow next to the Actions text and selecting Link Document. Issues and Risks are in this section as well when the next screen opens.



In this example, the first task is selected and so the heading of the screen shows the name of the task (Sample Task One):



Clicking on Link Document as the example above shows will open the linking screen instead of the details screen. Just as in the first method of opening the workspace from the Home screen of PWA, the workspace can be opened from the details screen. By selecting the down arrow next to the Go To option, the Project Workspace can be opened in a new window.



### **Check-In the Proposal**

Whether issues, documents or risks are added or not, the proposal is automatically checked-out to the person that creates it or has most recently been editing it. This is the way that the system ensures that two people aren't editing the same proposal at the same time. To see if a proposal is checked out, look at the Checked Out By column on the Proposals and Activities page. In this example, the user named "farmadmin" has the proposal checked out:



New ▾   Actions ▾		
Open Read-Only   Delete   Convert   Check In   Build Team   Resource Plan		
Name ▲	Published	Checked Out By
Router Benchmark System Upgrade	Yes	
Sample Proposal	Yes	farmadmin
Shipping Database Revision	Yes	

To check in the proposal, select the proposal (don't open it into the details screen) and then click on the Check In option. Confirm that the proposal has been checked in by looking again at the Checked Out By column and there should be no name at all in that column.