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Installing Microsoft Office Project Server 2007



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Introduction

This document outlines how to install and setup Microsoft Office Project Server 2007 as well as how to install and setup Microsoft Office Project 2007 to access your Project Server. Note that Project Server 2010 is now out, but I have not attempted an installation of that software.

Note that these instructions follow/mimic Microsoft's own installation instructions for Project Server 2007. It's probably a good idea to retrieve Microsoft's own installation instructions and use this document as an aide while you follow Microsoft's instructions. These instructions assume that you have not installed Project Server previously.

There are several books on the care-and-feeding of a Project Server, so please see the references at the end of this document. Also, Microsoft makes available several important documents on Project Server on their website. It's a good idea to peruse these documents first before attempting these installation instructions!

The installation of Project Server 2007 as well as Project 2007 is not difficult, but lengthy. It is recommended that you set aside a few solitary hours to go through the installation process in peace. If you can escape to the confines of your server room, even better. Please have a pencil and paper available since you will have to write down several VERY IMPORTANT pieces of information while proceeding through these instructions. Note that you may need the help of a SQL Server database administrator while proceeding through these instructions.

Note that installing Project Server 2007 in your organization is only the first step in a series of tasks the Project Server Administrator must perform before Project Server can be used successfully within your organization. Unlike other pieces of software, Project Server 2007 is NOT an *install it and forget it* piece of software. In order to use Project Server successfully within your organization, you must involve Management, the Project Managers as well as the users since each one of these groups will expect something different from Project Server. From Management's perspective, they will expect to know if projects are on-time and within budget. The Project Managers will want to know how to load their project plans to the server from Project 2007 as well as how to update the information on the server. Each group will have to be trained in how to use the Internet Explorer interface. If these all seems daunting to you, you are correct and you should be aware that companies HIRE companies to install and setup Project Server. That does not mean that you – the Lone Wolf – shouldn't try to install and setup this software, but be aware that – after the software has been installed – you are going to have to go through several pilot tests in order to determine if you need further assistance in order to get the software to do what you want it to.

With all that said, I believe that Microsoft Office Project Server is one of THE MOST IMPORTANT pieces of software you can have in your company and the pain you will go through in the short-term will yield massive dividends to the company in the long-term. Just to emphasize this point: When was the last time you ever heard someone talk about a piece of software like that?!? ☺ Good Luck!

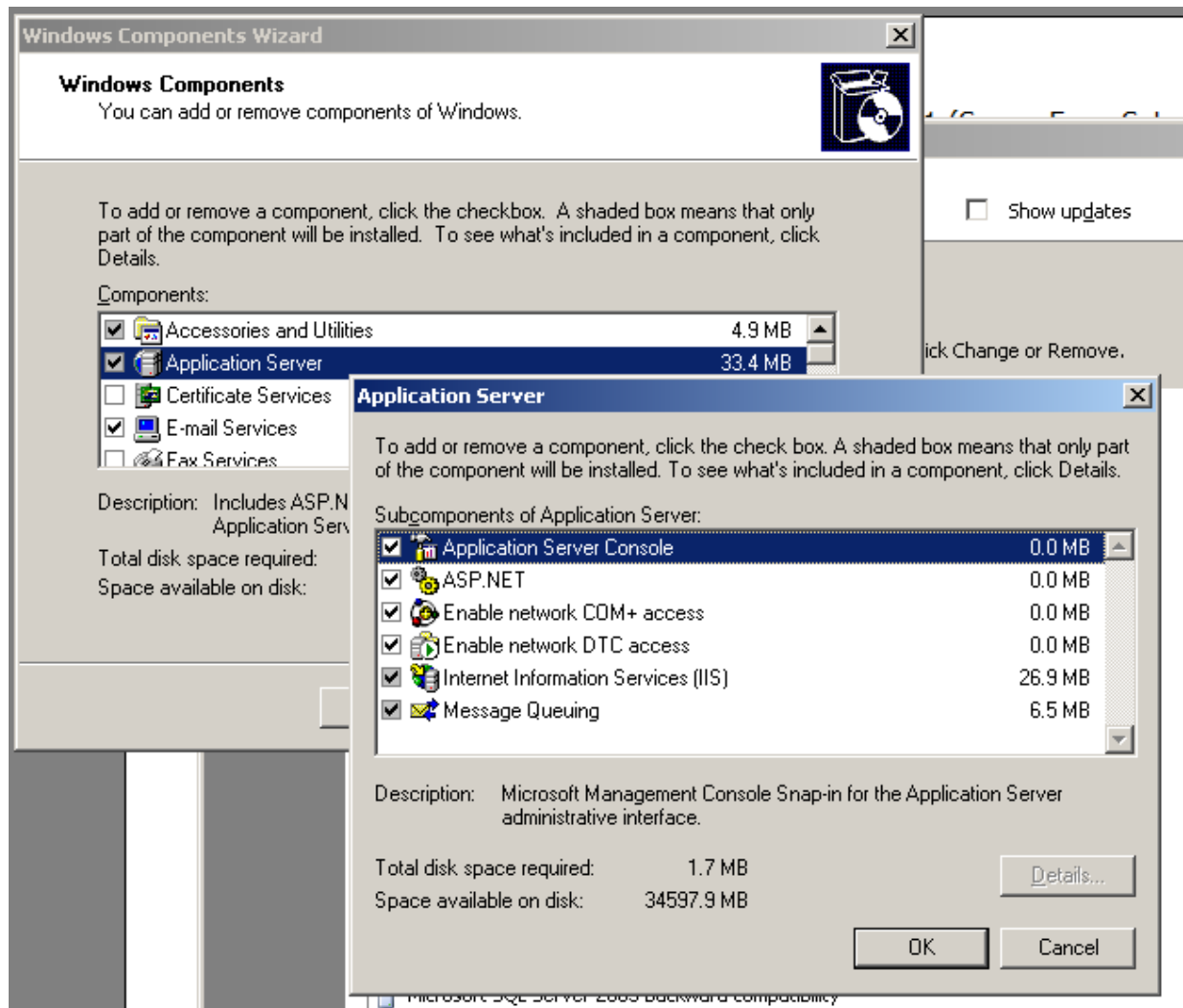
PERFORM THESE INSTALLATION INSTRUCTIONS ON A TEST SERVER FIRST AND NOT A PRODUCTION SERVER UNTIL YOU ARE CONFIDENT WITH THESE INSTRUCTIONS. YOU HAVE BEEN WARNED!!



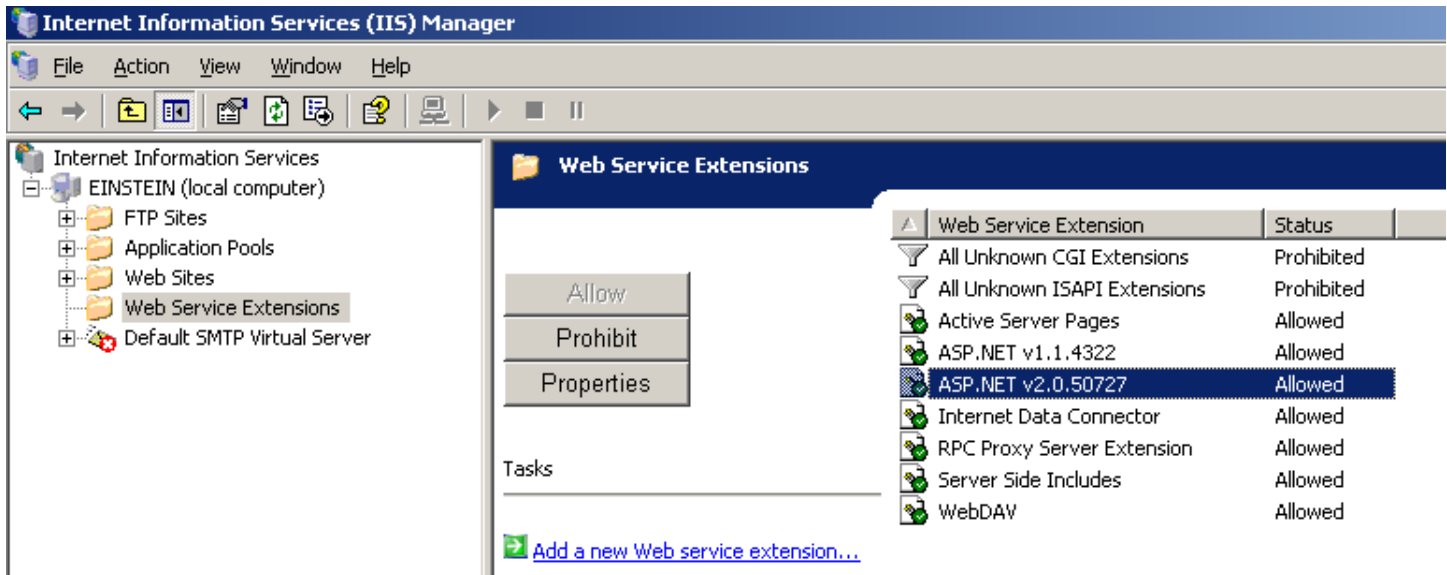
Installing Project Server 2007 (Server Farm Setup) without WSS 3.0 Previously Installed

You will need a minimum of two servers: one will serve as the web server for Project Server 2007 (Microsoft Windows Server 2003 Enterprise Edition) and the other will house the Project Server 2007 databases (Microsoft SQL Server 2005 Enterprise Edition). Ensure that Analysis Services and Reporting Services are installed on the SQL Server 2005 Enterprise Edition server.

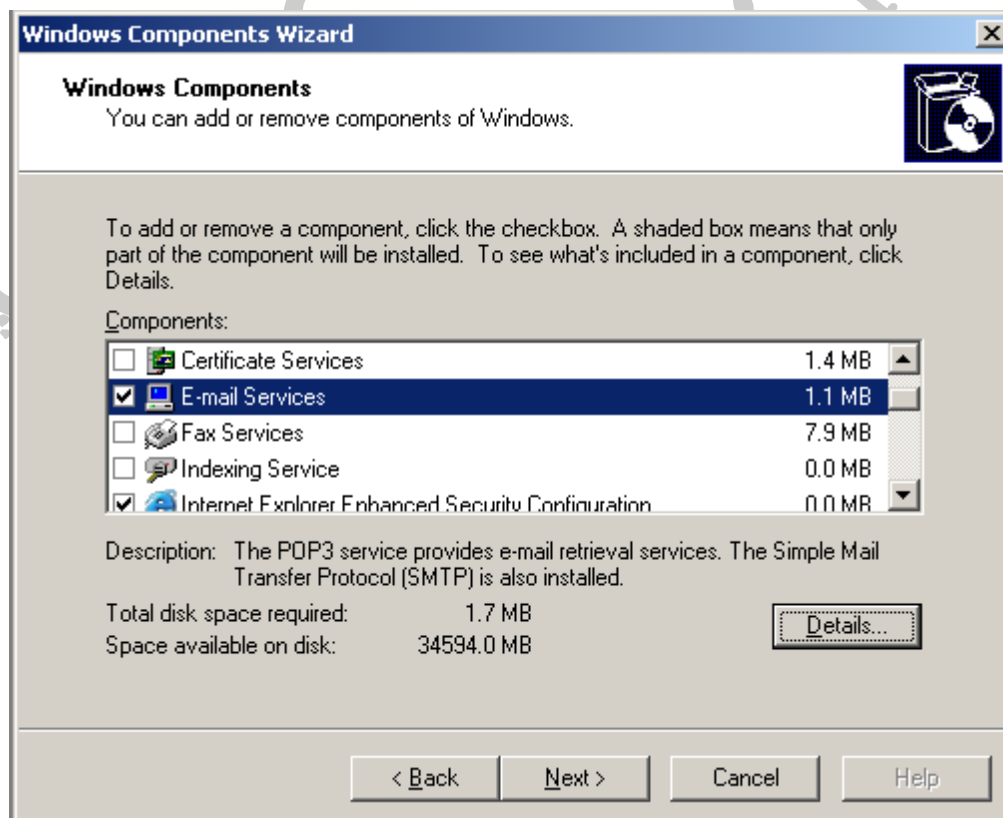
1. Install Microsoft Windows Server 2003 Enterprise Edition
2. Ensure that Microsoft .Net Framework 3.0 or greater is installed
3. Install IIS 6.0 (START...Control Panel...Add or Remove Programs...Add/Remove Windows Components...check Application Server and click on Details...check all boxes and click OK....click Next.



4. Ensure that IIS not running in isolation mode by navigating to Start...Administrative Tools...Internet Information Services (IIS) Manager. Next, right click on the Web Sites folder and click the Properties menu item on the popup menu. Click the Services tab and ensure that the checkbox to the left of the text "Run WWW service in IIS 5.0 isolation mode" is unchecked.
5. Ensure that ASP.Net is running by starting Internet Information Services (IIS) Manager (START...Administrative Tools, Internet Information Services (IIS) Manager menu item), expand the server node and click on the Web Services Extensions folder. On the right pane, click on ASP.NET v2.0.50727 and ensure that Allowed is the status. If not, click on the Allow button.

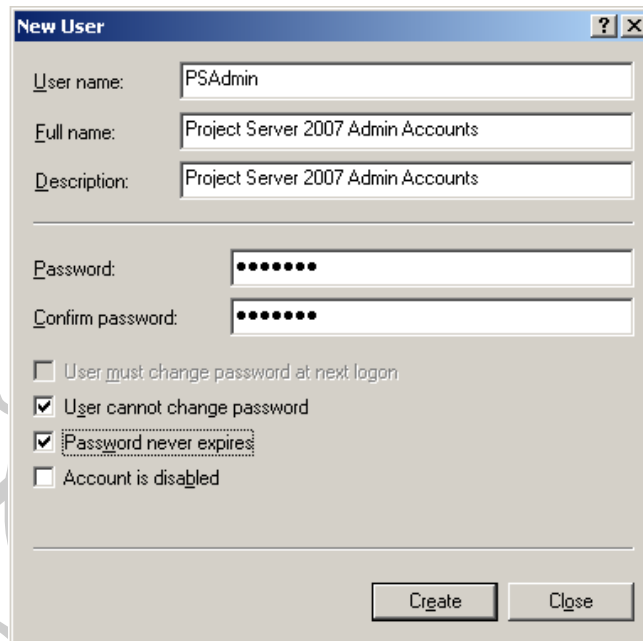


- Install SMTP and ensure that incoming and outgoing email support is configured and working properly. (START...Control Panel...Add or Remove Programs...Add/Remove Windows Components...place a checkbox next to E-mail Services and click Next).



- Download Microsoft Project Server 2007 from Microsoft's download website. The software may be a CD-ROM image (.img or .iso) file and will have to be burned on CD-ROM before starting the installation.
- Download Microsoft Project 2007 Professional from Microsoft's download website. This software may be a CD-ROM image (.img or .iso) file and will have to be burned on CD-ROM before starting the installation. This will be installed after Project Server 2007 has been installed.

9. Install Microsoft SQL Server 2005 on a separate machine or locate a SQL Server 2005 machine in-house that can be used to house the Project Server 2007 databases. Ensure that Analysis Services and Reporting Services are installed on the SQL Server 2005 server. Ensure that the database will allow for Windows Authentication. Talk to your SQL Server Administrator and let him/her know that you are installing Project Server!
10. Microsoft's Project Server Deployment Guide describes five user accounts: Windows the SharePoint Services Service Account, the Application Pool Security Account, the Site Collection Owner Account, the Shared Service Provider Administrator Account, and the Project Server Instance Administrator Account. You create these accounts in the Computer Management window (Start...Administrative Tools...Computer Management). Expand the Users and Groups folder. Right-click the Users folder and click the New User menu item from the popup menu. For the test version, we will use one account: PSAdmin/password. Ensure that the user cannot change password and the password never expires. Next, place this user in the Administrator's group.

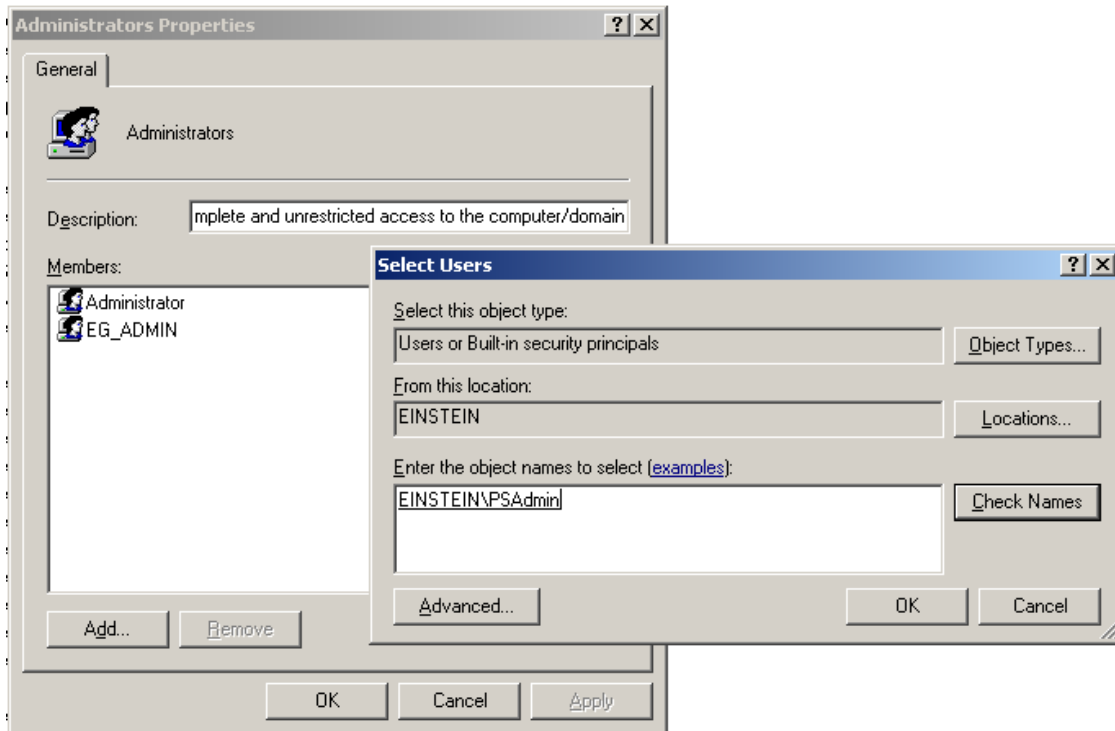


The screenshot shows the 'New User' dialog box with the following fields and options:

- User name: PSAdmin
- Full name: Project Server 2007 Admin Accounts
- Description: Project Server 2007 Admin Accounts
- Password: [Redacted]
- Confirm password: [Redacted]
- User must change password at next logon
- User cannot change password
- Password never expires
- Account is disabled

Buttons: Create, Close

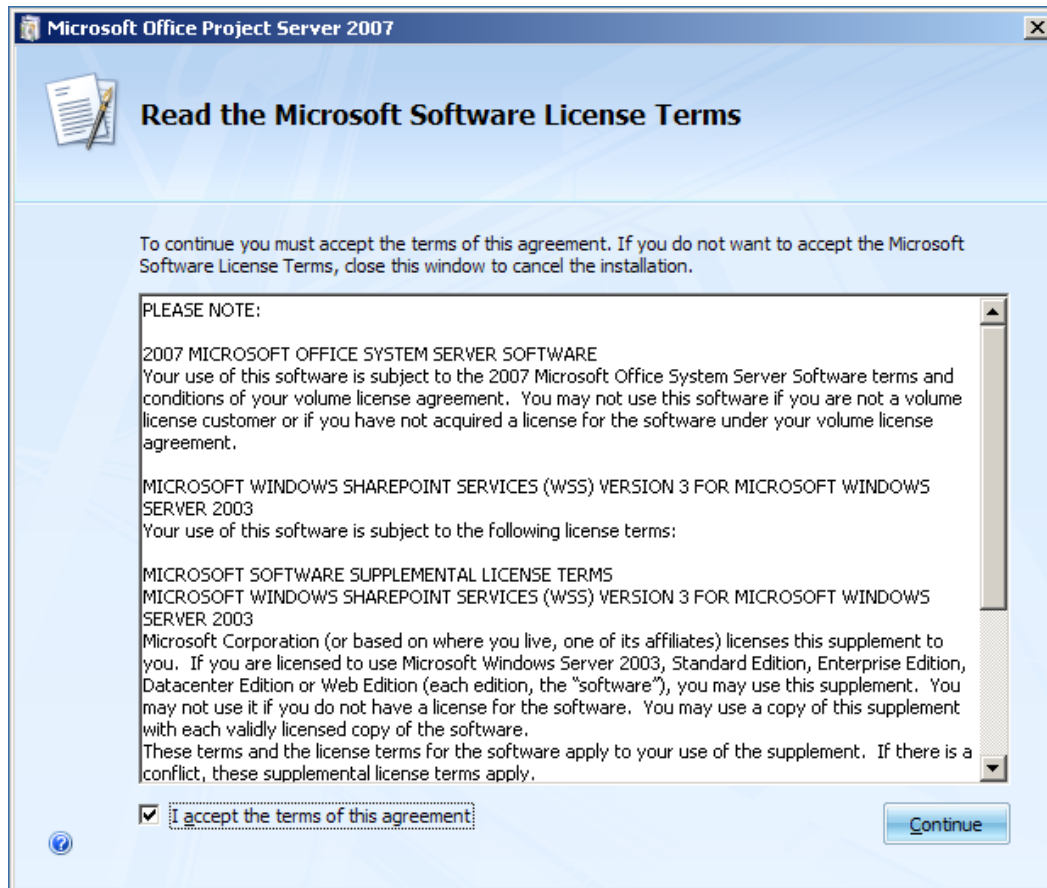
Next, place the PSAdmin user in the Administrator's group. Click on the Groups folder, double-click Administrators, click the Add... button and add the EINSTEIN\PSAdmin user. Click OK.



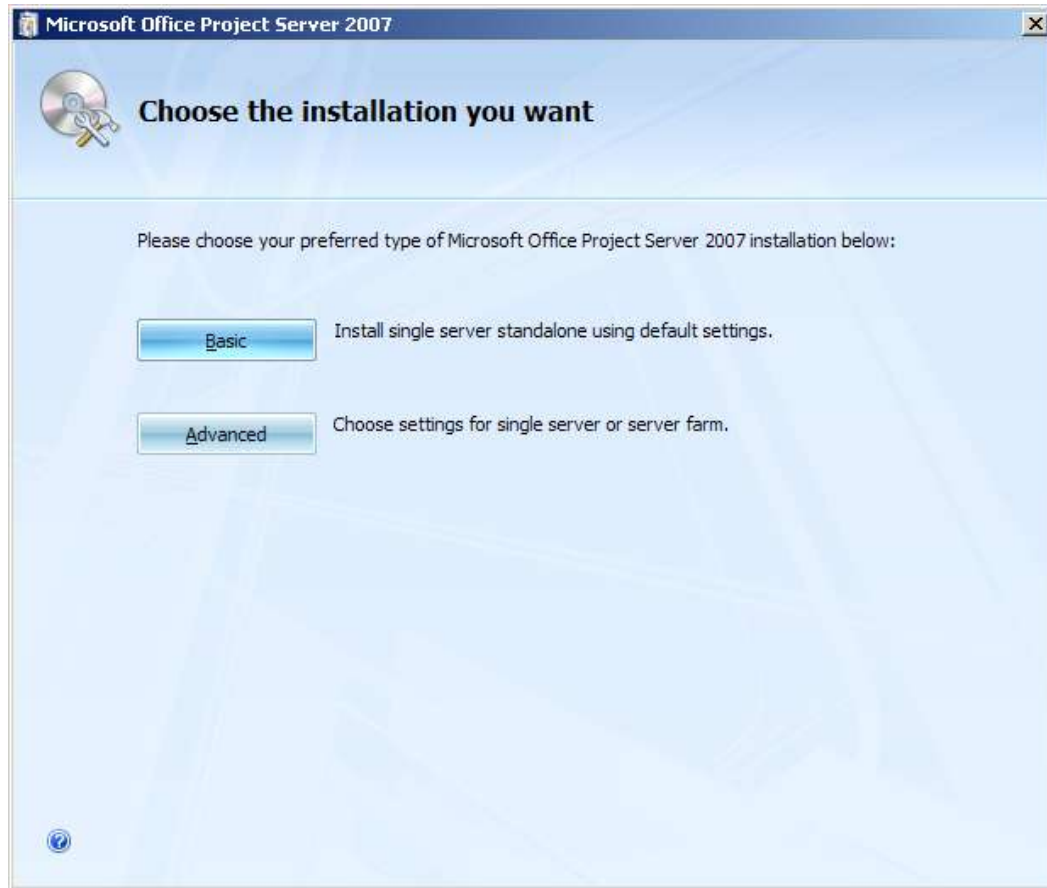
11. On the database server machine within SQL Server Management Studio, create a new login account with the username of PSAdmin and give it the following server roles: dbcreator, public, securityadmin. Ensure that this user also has public database roles to master, model, msdb, tempdb, ReportServer and ReportServerTempDB.
12. Insert the Project Server 2007 CD-ROM into the CD-ROM drive. The software will automatically start.
13. The first screen to appear will ask you to enter in your Project Server 2007 Product Key. Enter in the product key into the input box. A green checkmark will appear if the key is correct. If so, click Continue.



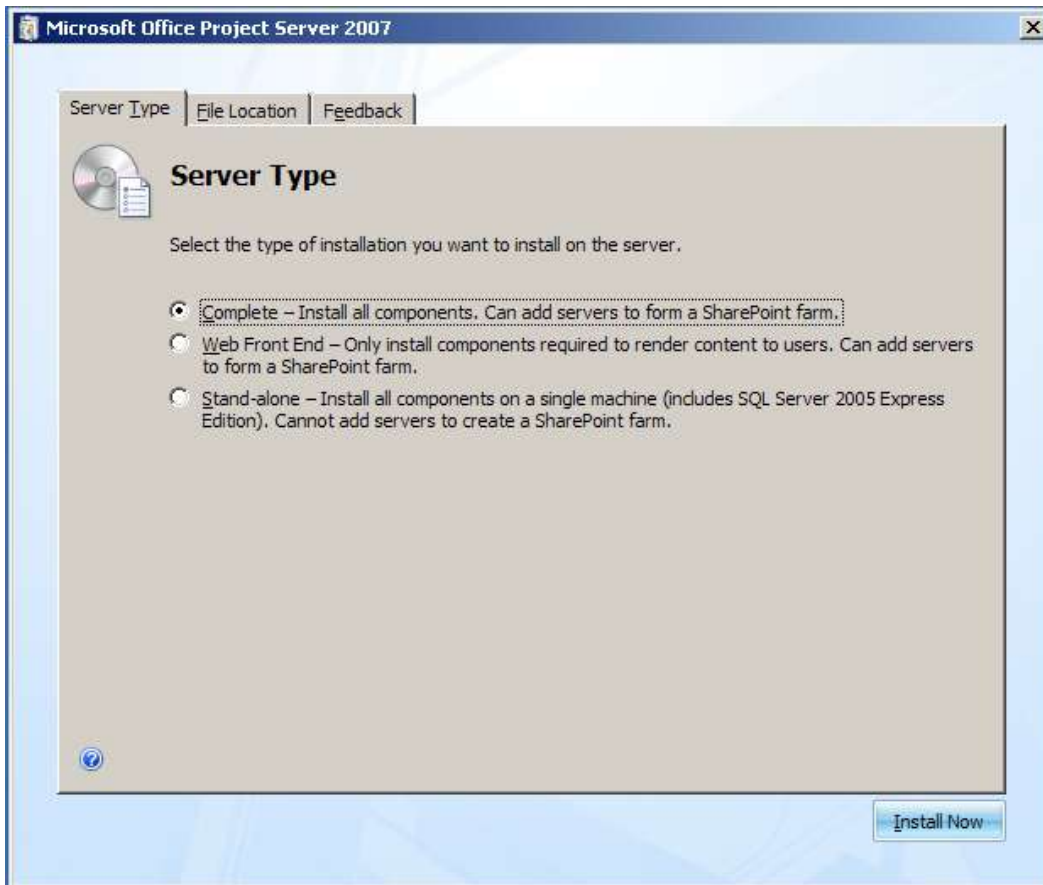
14. Next, on the Read the Microsoft Software License Terms, click on *I accept the terms of the agreement* then click Continue.



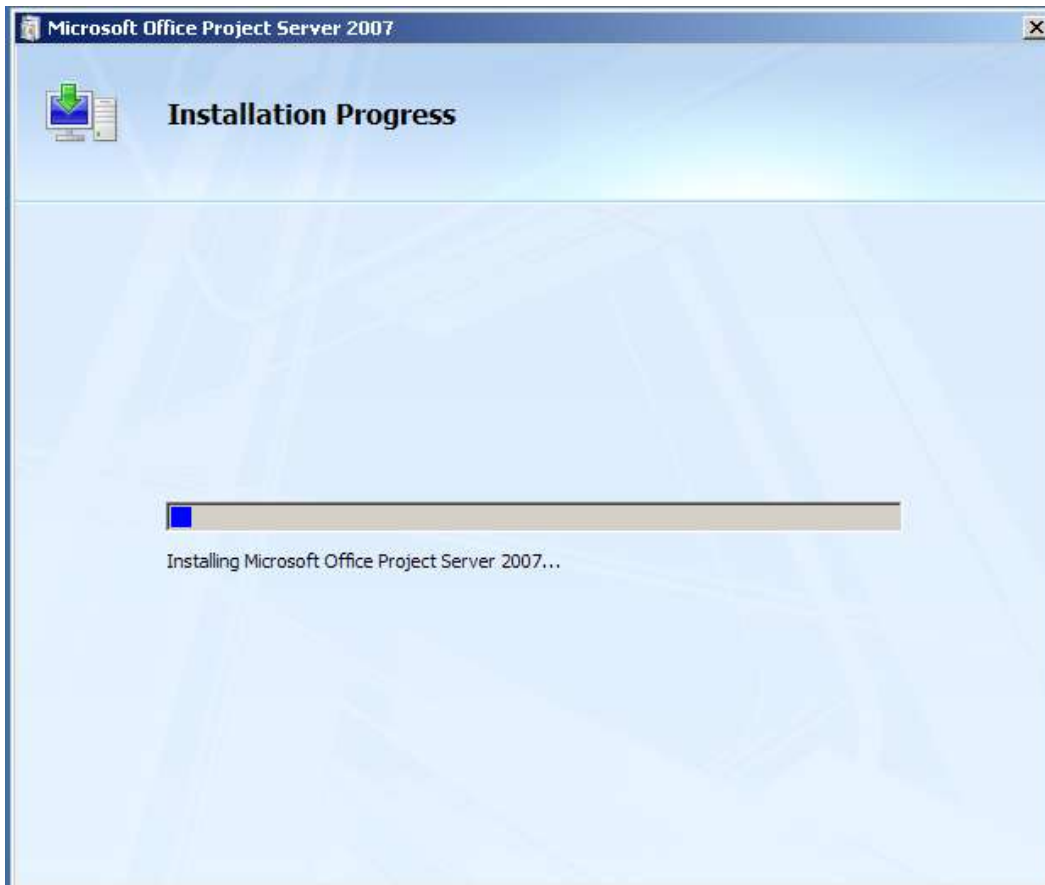
15. On the Choose the installation you want dialog box, click the Advanced button.



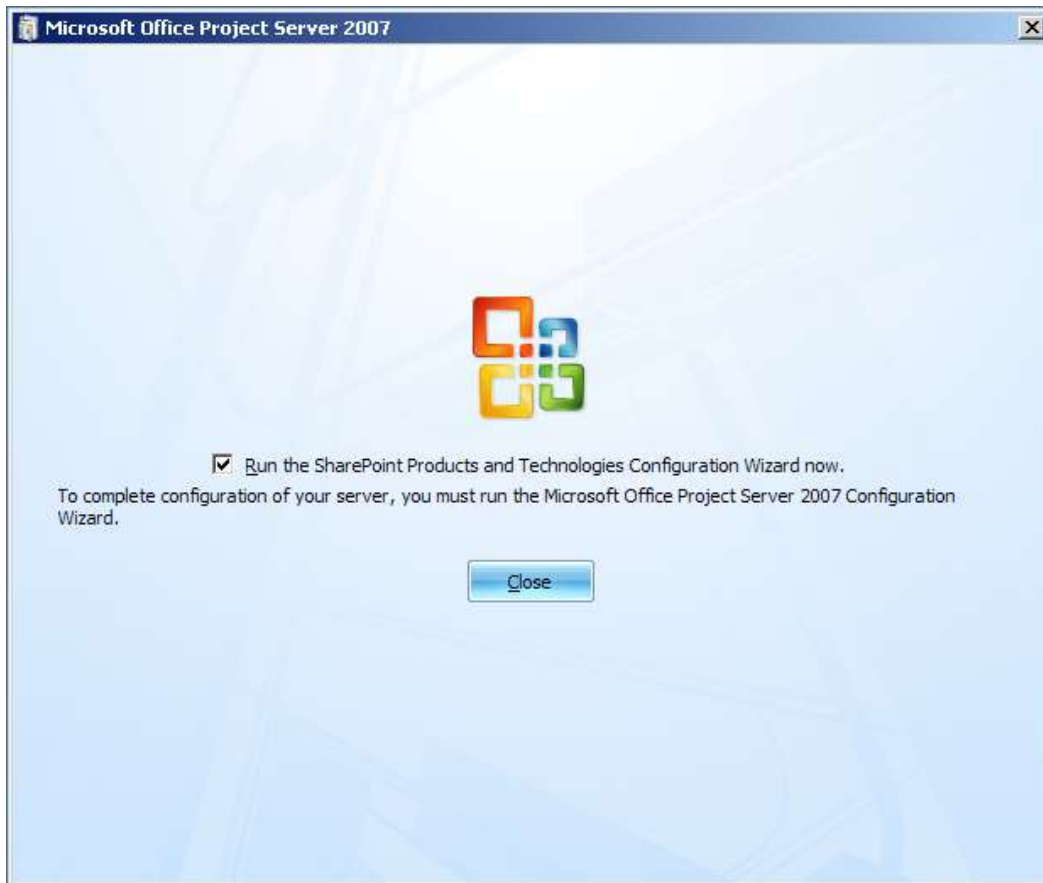
16. On the Server Type dialog box, click on the Complete radio button and click on the Install Now button:



17. You will see the following dialog box while the installation is occurring:



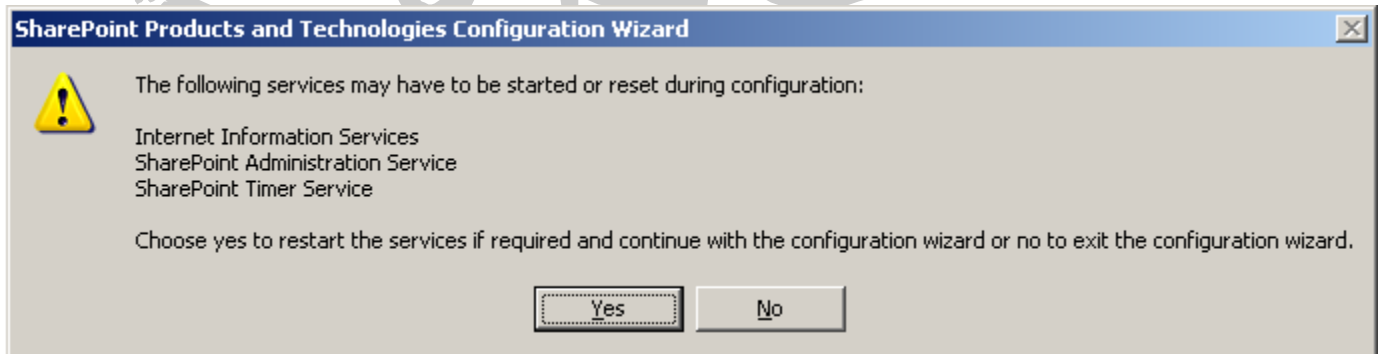
18. Once the installation is complete, you will see the following dialog box:



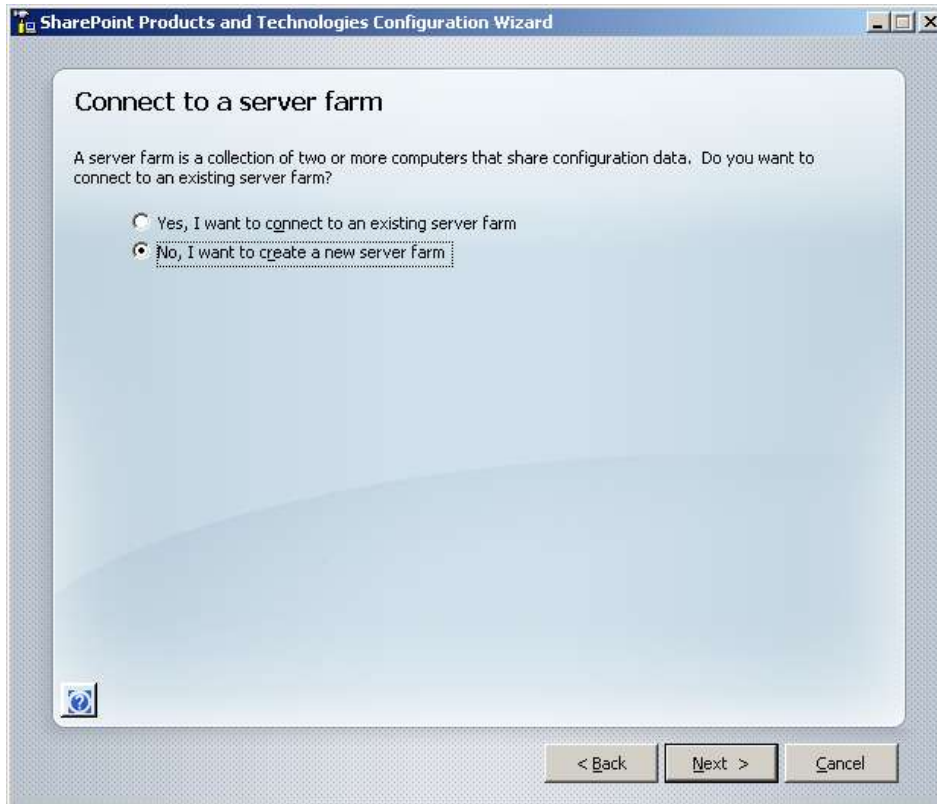
19. Click on the Close button to start the *SharePoint Products and Technologies Configuration Wizard*.
20. On the Welcome dialog box, click on the Next button:



21. Click Yes when this dialog box pops up:



22. Click the No, I want to create a new server farm radio button and then click the Next button:



23. On the following dialog box, fill in the name of the SQL Server 2005 database server name in the Database Server input box; leave Database Name input box alone; enter in the username (in DOMAIN\USERNAME format) and password in the remaining two dialog boxes. Here, you should use DOMAIN\PSAdmin (where DOMAIN is your domain) rather than Administrator as you see below. Enter in the password for PSAdmin. Click the Next button.

SharePoint Products and Technologies Configuration Wizard

Specify Configuration Database Settings

All servers in a server farm must share a configuration database. Type the database server and database name. If the database does not exist, it will be created. To reuse an existing database, the database must be empty. For additional information regarding database server security configuration and network access please see [help](#).

Database server:

Database name:

Specify Database Access Account

Select an existing Windows account that this machine will always use to connect to the configuration database. If your configuration database is hosted on another server, you must specify a domain account.

Type the username in the form DOMAIN\User_Name and password for the account.

Username:

Password:

< Back Next > Cancel



24. On the following dialog box, ensure that Specify port number is unchecked and that NTLM is checked. Click the next button:



25. On the final dialog box, you will see a list of your configuration options as well as the name and port number of your Project Server web server. Click the Next button.



While the installation is proceeding, you will see the following dialog box:

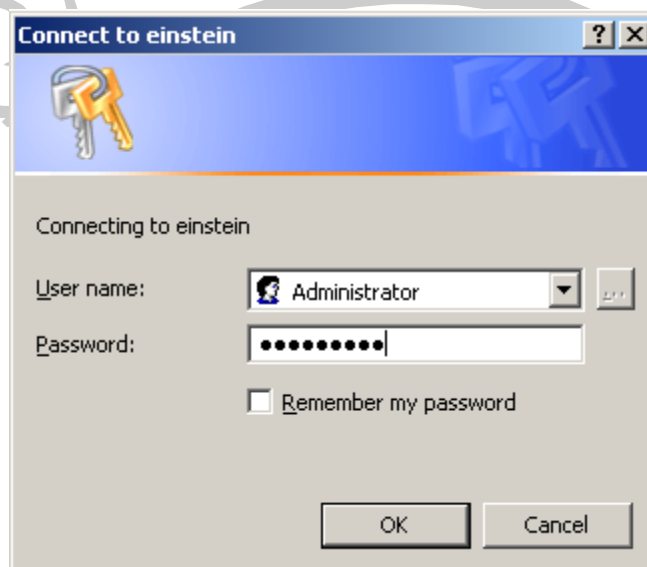


26. Finally, after the configuration completes successfully, you will see this dialog box:

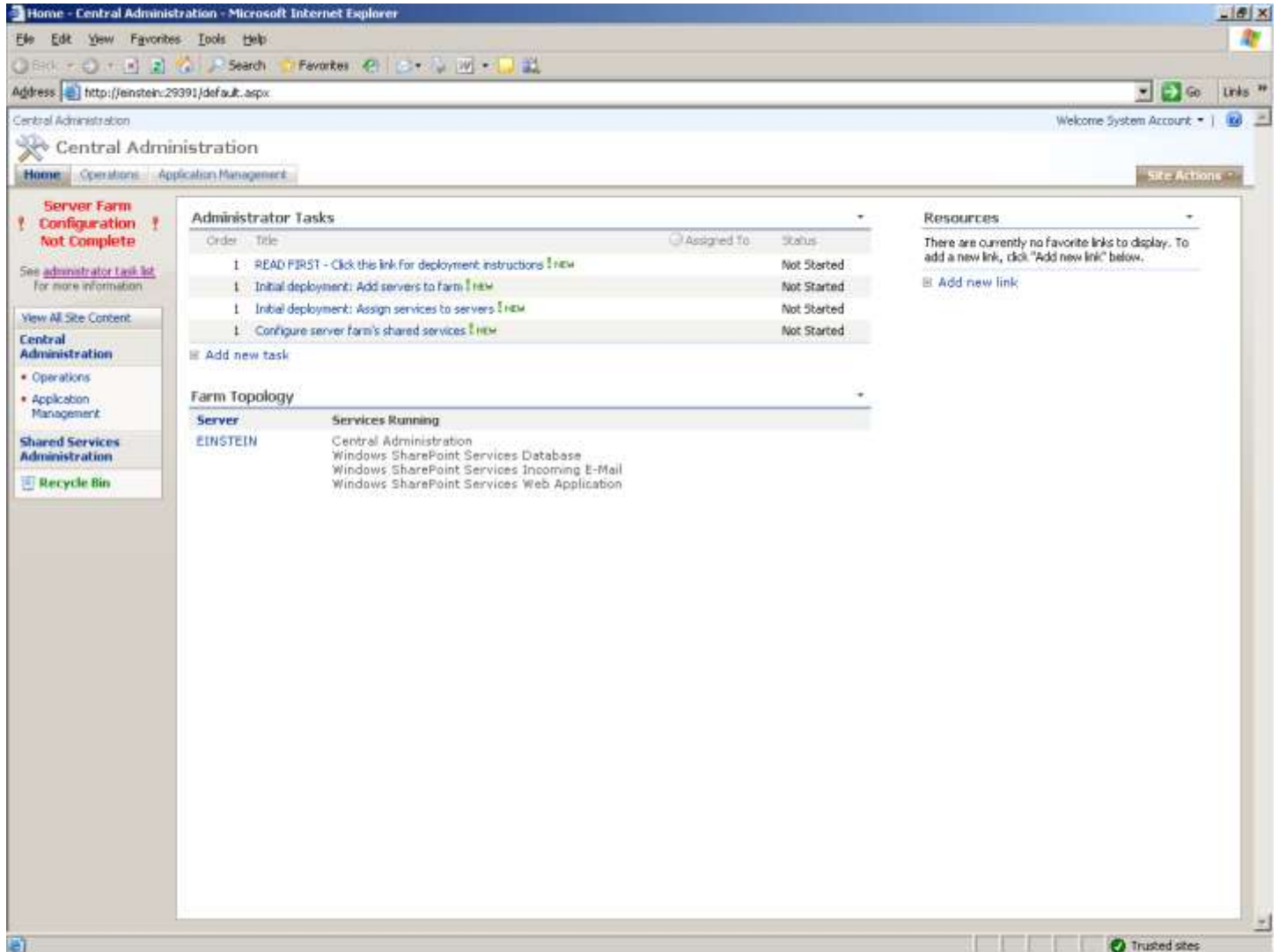


When you click on Finish, the SharePoint Central Administration website is opened up in Internet Explorer. You can also access this site from START...Administrative Tools...SharePoint 3.0 Central Administration menu item.

Note that you may be presented with a dialog box to enter in your username and password before being allowed to see the website:



Add this site to your trusted sites. Finally, you are presented with the SharePoint 3.0 Central Administration website below. Take note that your site still needs some configuration as indicated by the “Server Farm Configuration Not Complete” message.



Configuring the Server Farm

Next, you need to perform some configuration before you can start to use Project Server 2007. Open up the document *Deployment for Office Project Server 2007*. This section references pages 35 to 41.

1. Configure Farm Services (following instructions on p35): Navigate to Operations Tab...Services on Server link. The task is to start the Project Application Service as well as the Windows SharePoint Search Service.
 - a. Click Start under the Action column for Windows SharePoint Search Service
 - i. Service Account Username: EINSTEIN\PSAdmin
 - ii. Service Account Password: password
 - iii. Content Account Username: EINSTEIN\PSAdmin
 - iv. Content Account Password: password
 - v. Search Database Database Server Name: EINSTEIN
 - vi. Search Database Database Name: WSS_Search_EINSTEIN
 - vii. Ensure the radio button for Windows Authentication is selected
 - viii. Indexing Schedule: Daily between 12AM and 3AM.
 - ix. Click Start to start the Service
 - b. Click start under the Action column for Project Application Service.
 - i. An Operation in Progress screen appears and then you are brought back to the Services on Server page.
2. Create Web Applications on the server (following instructions on p35). For Project Server 2007, you will need to create two sites: The Project Web Access Site and the Shared Services Provider Home Site.
 - a. Creating the Project Web Access Site:
 - i. Go to Application Management and click the *Create or Extend Web Application* link under the *SharePoint Web Application Management* section.
 - ii. Click the Create a New Web Application link
 1. Ensure that Create a New IIS web Site is checked
 2. Description: SharePoint – 80
 3. Port: 80
 4. Host Header: <leave blank>
 5. Path: C:\inetpub\wwwroot\wss\VirtualDirectories\80
 6. Ensure NTLM is selected
 7. Ensure No is selected under Allow Anonymous
 8. Ensure No is selected under Use Secure Sockets Layer (SSL)
 9. For Load Balanced URL, use <http://EINSTEIN:80/>
 10. Ensure that Create a New Application Pool is selected
 11. Application Pool Name: SharePoint – 80
 12. Ensure that Configurable is selected
 13. Username: EINSTEIN\PSAdmin
 14. Password: password
 15. Ensure that Restart IIS Automatically is selected
 16. Database Server: EINSTEIN
 17. Database Name: WSS_Content
 18. Ensure Windows Authentication is selected
 19. Under the Search Server section, select EINSTEIN.
 20. Click OK. An Operation in Progress page will display for a minute.
 21. From the command prompt, issue `iisreset /noforce` to restart IIS.
 22. On the Application Created webpage that appears, click the Create Site Collection link.
 23. On the Create Site Collection page:
 - a. Title: WebApp1

- b. Description: WebApp1 is a Web Application to Host the Project Web Application Site.
 - c. Select /sites from the dropdown
 - d. Enter the following in the input box: webapp1
 - e. Select Team Site under the Template Section
 - f. Primary Site Collection Administrator: EINSTEIN\PSAdmin
 - g. Secondary Site Collection Administrator: EINSTEIN\Administrator
 - h. Select No Quota in the drop down box under the Quota Template.
 - i. Click OK
 - j. You will be shown the Top-Level Site Successfully Created page and it will show you the URL: <http://einstein/sites/webapp1>
 - iii. Click OK
- b. Create Web Application to Host Shared Service Provider:
 - i. Go to Application Management and click the *Create or Extend Web Application* link under the *SharePoint Web Application Management* section.
 - ii. Click the Create a New Web Application link
 - 1. Ensure that Create a New IIS web Site is checked
 - 2. Description: SharePoint - 45587
 - 3. Port: 45587
 - 4. Host Header: <leave blank>
 - 5. Path: C:\inetpub\wwwroot\wss\VirtualDirectories\45587
 - 6. Ensure NTLM is selected
 - 7. Ensure No is selected under Allow Anonymous
 - 8. Ensure No is selected under Use Secure Sockets Layer (SSL)
 - 9. For Load Balanced URL, use http://EINSTEIN:45587/
 - 10. Ensure that Create a New Application Pool is selected
 - 11. Application Pool Name: SharePoint – 80
 - 12. Ensure that Configurable is selected
 - 13. Username: EINSTEIN\PSAdmin
 - 14. Password: password
 - 15. Ensure that Restart IIS Automatically is selected
 - 16. Database Server: EINSTEIN
 - 17. Database Name: WSS_Content_29ceedde6fd14da4a99663e63f0fc241
 - 18. Ensure Windows Authentication is selected
 - 19. Under the Search Server section, select EINSTEIN.
 - 20. Click OK. An Operation in Progress page will display for a minute.
 - 21. The Application Created webpage will appear.
 - 22. From the command prompt, issue iisreset /noforce to restart IIS.
 - iii. Click OK
- 3. Create the Shared Services Provider (following instructions on p38):
 - a. Click on the *Application Management* tab click the *Create or Configure this farm's shared services* link.
 - b. Click the New SSP link
 - i. SSP Name: SharedServices1
 - ii. Web Application: SharePoint – 45587
 - iii. Note the URL for the Shared Services Provider: <http://einstein:45587/ssp/admin>
 - iv. Username: EINSTEIN\PSAdmin
 - v. Password: password
 - vi. Database Server: EINSTEIN
 - vii. Database Name: SharedServices1_DB
 - viii. Ensure Windows Authentication is checked
 - ix. Ensure No is selected under Use Secure Sockets Layer (SSL).
 - x. Click OK. An Operation in Process screen will appear.
 - c. Click OK to go to the Manage this Farm's Shared Services page (needed for the next section).

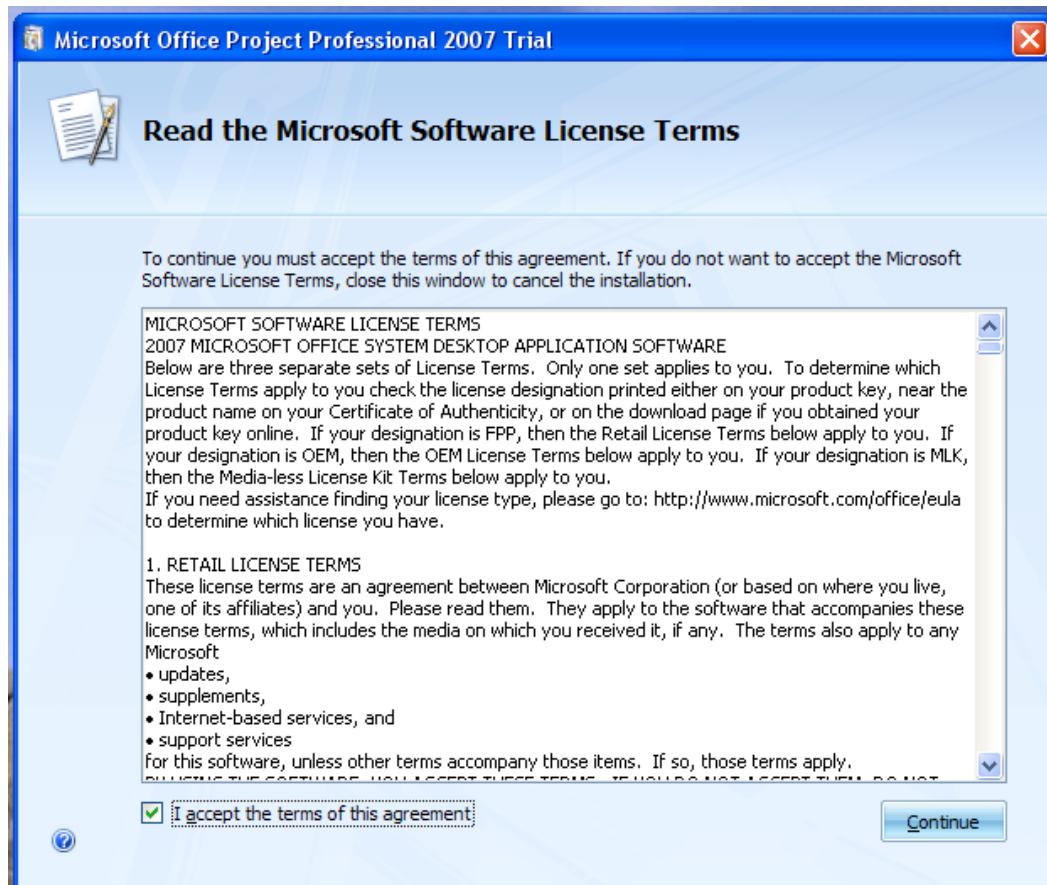
4. Provision the Project Server 2007 Site on the Farm
 - a. On the Manage this Farm's Shared Services webpage will allow you to create the Project Server 2007 instance on the farm.
 - i. Click the link entitled SharedServices1 (Default). Enter your username and password if an authbox appears.
 - ii. Click the Project Web Access Sites link under the Project Server section (should be only one section)
 - iii. On the *Manage Project Web Access Sites* webpage, click on the *Create Project Web Access Site* link.
 - iv. On the Create Project Web Access site webpage:
 1. In the drop-down box, select SharePoint – 80
 2. For the path, use the name: pwa
 3. Leave *Use Project Web Access path as host header* unchecked.
 4. For the administrator account: EINSTEIN\PSAdmin
 5. For Primary database server: EINSTEIN
 6. Published database name: ProjectServer_Published
 7. Draft database name: ProjectServer_Draft
 8. Archive database name: ProjectServer_Archive
 9. Ensure that *Use the primary database server* is checked under Reporting Database.
 10. Reporting database name: ProjectServer_Reporting
 11. Click OK. The provisioning starts. Click the Refresh button to see when the provisioning is complete. This may take a few minutes to complete...smoke if you got 'em. When you see the word "Provisioned" under Status, you're good to go.
5. Navigate to your Project Server 2007 site: <http://einstein/pwa>.

Installing Project 2007 Professional

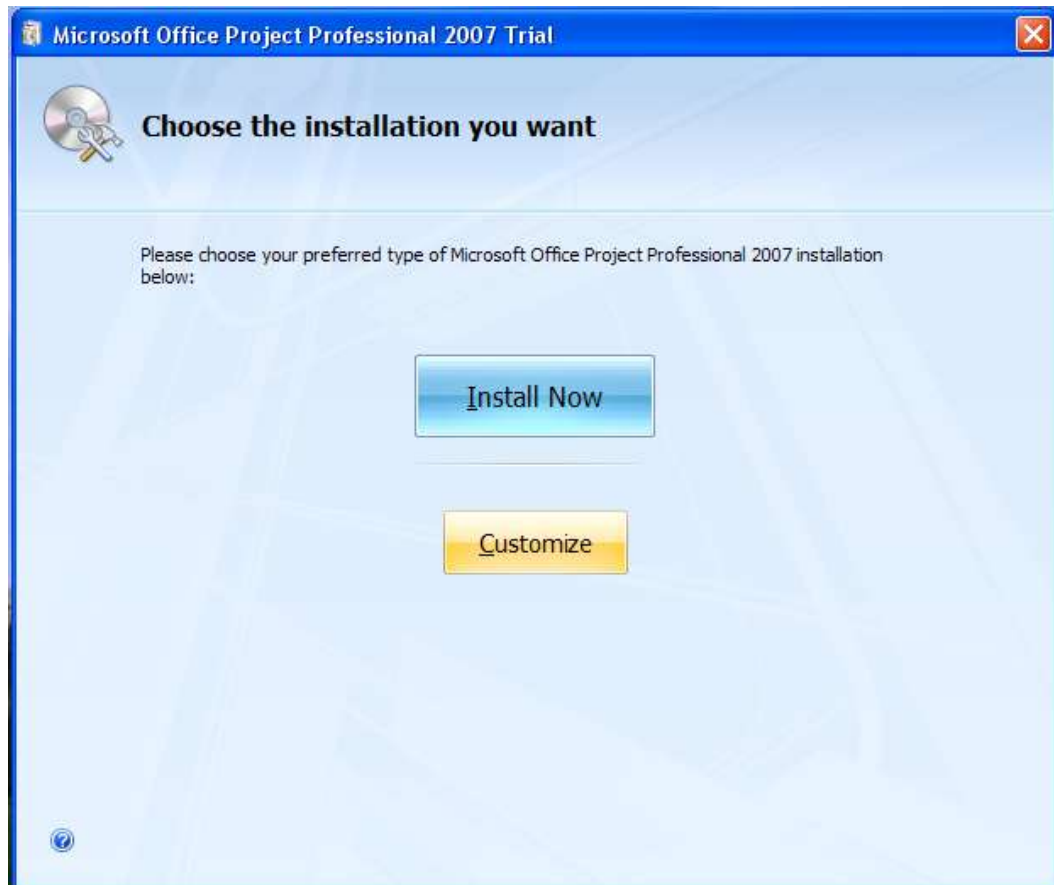
1. If you don't already have the software in-house, download Microsoft Project 2007 Professional from Microsoft's download site. This software may be a CD-ROM image (.img or .iso) and you will have to create a CD from this image.
2. Exit from Microsoft Word, if you currently have it opened.
3. Insert the CD-ROM into your CD-ROM drive. The software will automatically start the installation.
4. Enter in your product key. You can skip the Referral Key. Click Continue.



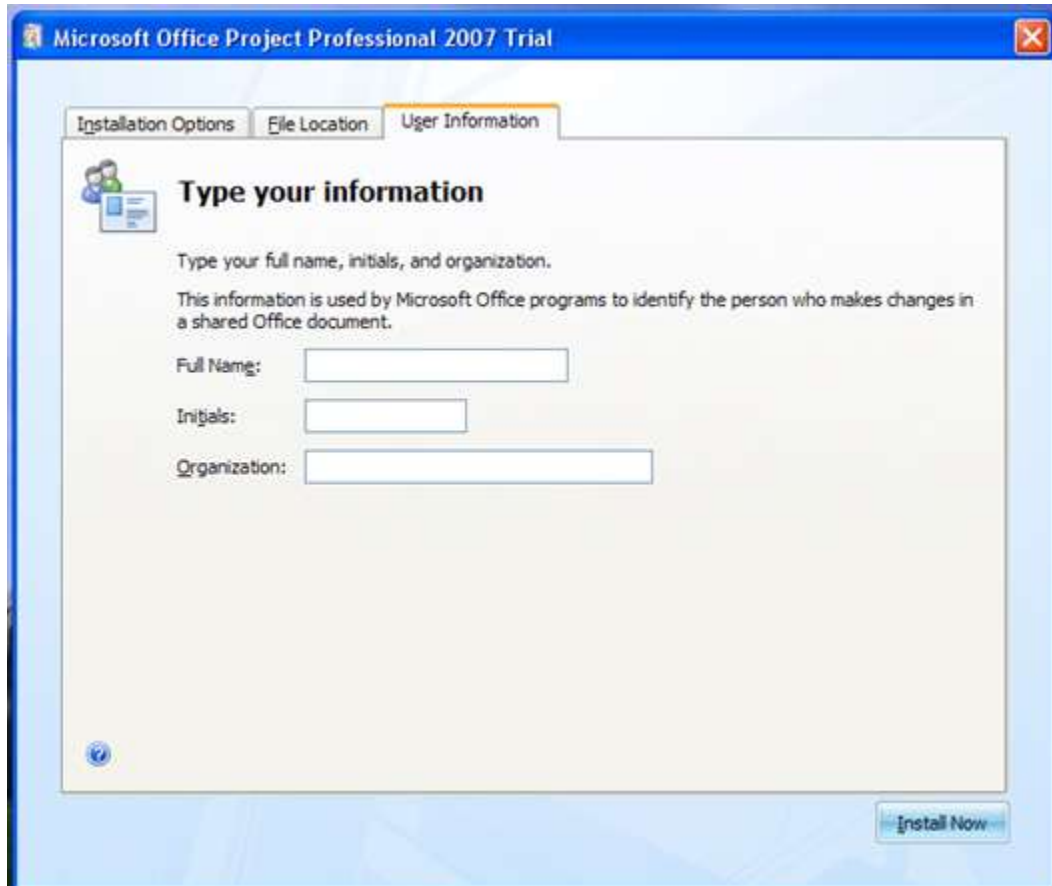
5. Click the checkmark next to the text "I accept the terms of this agreement"
6. Click Continue.



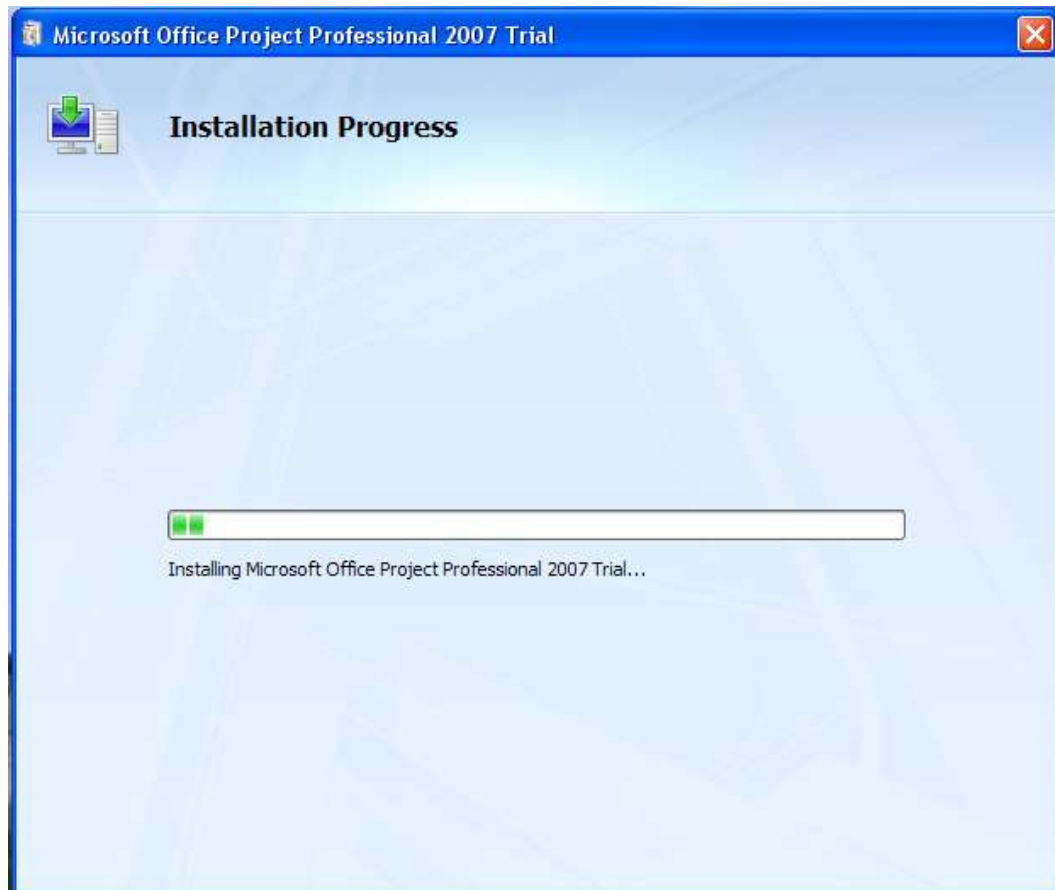
7. You can click Install or Customize. If you want Project 2007 Professional to be installed in its default drive location, just click Install; otherwise, click Customize and the click Install Now.



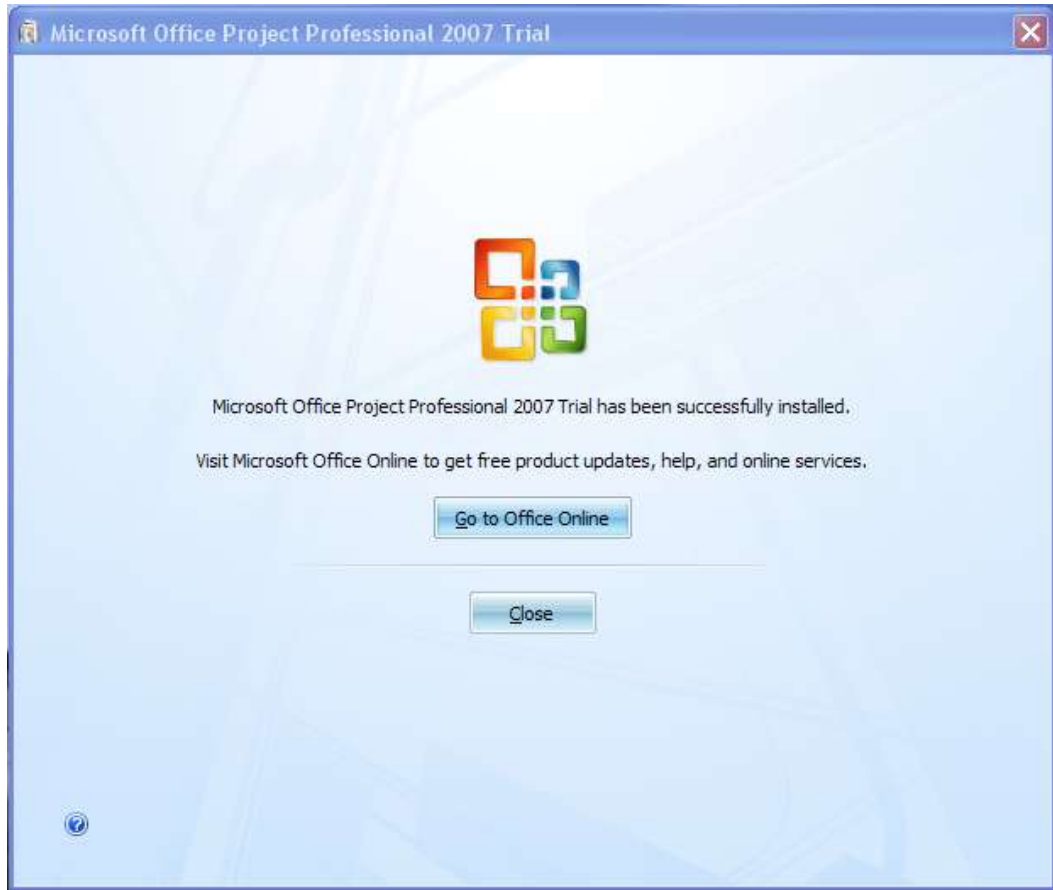
8. For our installation, click Customize and then click on the User Information tab and fill out your information as I've done below. Click Install Now to continue the installation.



9. The Installation Progress will display for a few minutes while the software is being installed.



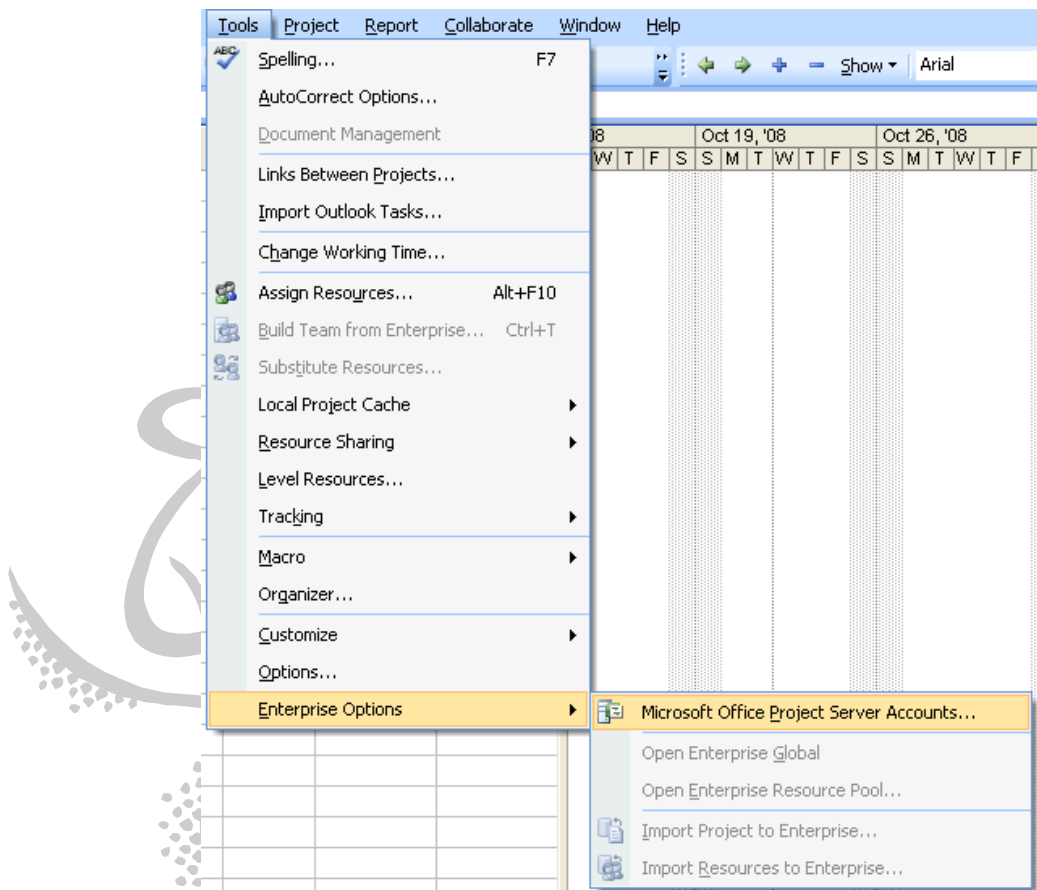
10. Once complete, click the Close button and re-start your machine.



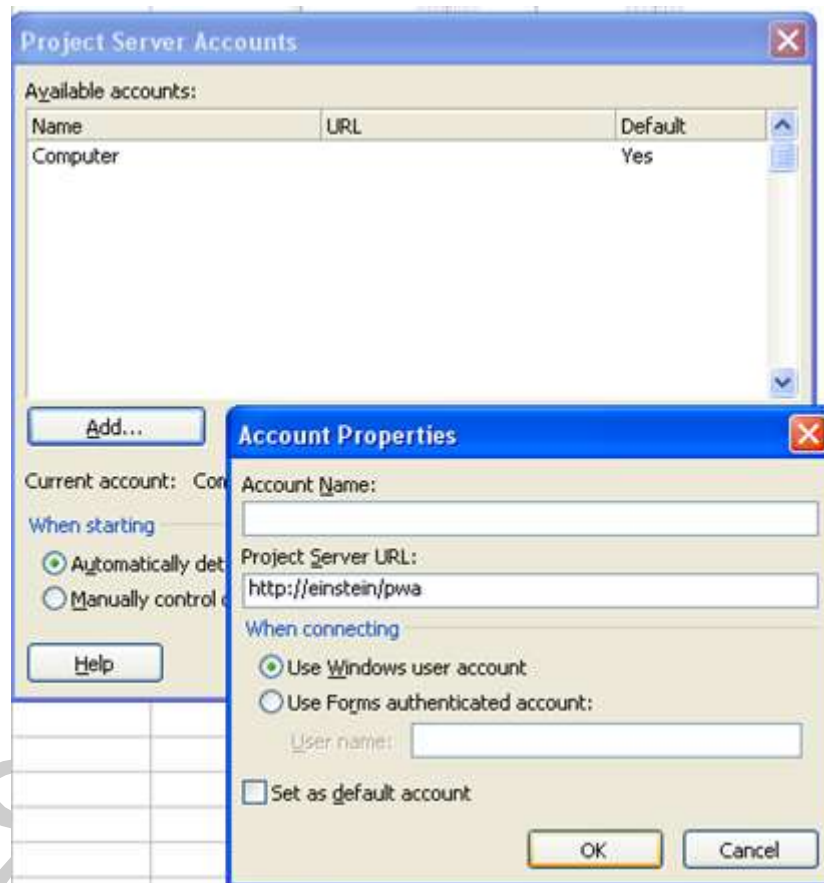
Setting Up Project 2007 Professional to Work with Project Server 2007

Note: Interaction with Microsoft Office Project Server 2007 is ONLY possible with the Professional version of Microsoft Project 2007. The Standard edition does NOT allow interaction with Project Server 2007.

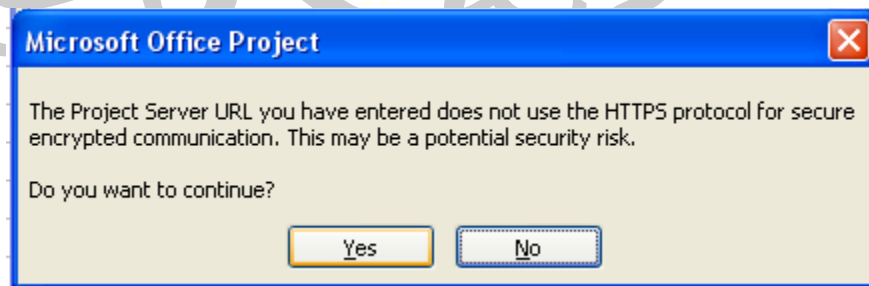
1. Once you have completed the installation of Microsoft Project 2007 Professional as well as Project Server 2007 installation, you can set up Project 2007 Professional to communicate with Project Server 2007. Open up Project 2007 Professional by clicking on Start...All Programs...Microsoft Office...Microsoft Office Project 2007.
2. Next, click on the Tools...Enterprise Options...Microsoft Office Project Server Accounts...



3. In the Project Server Accounts dialog box, click on the Add... button. Fill out the Account Properties dialog box.
 - a. For the Account Name input box, enter in some descriptive text, usually your full name.
 - b. For the Project Server URL input box, enter in the full URL of the Project Server 2007 website. This information can be obtained from your Project Server Administrator.
 - c. Ensure that the radio button to the left of Use Windows user account is selected.
 - d. Click OK



4. You may receive a warning that the URL you've entered is not secure. Click Yes to dismiss this dialog box.



5. You are brought back to the Project Server Accounts dialog box.
 - a. Select the account you just set up by clicking on it once.
 - b. Click the Set as Default button.
 - c. Ensure that the radio button to the left of Automatically detect connection state is selected.
 - d. Click OK.

Note that within Microsoft Project 2007 Professional, you can display many of the Project Server 2007 web pages without having to leave Project 2007 Professional. For instance, to bring up Project Center within Project 2007 Professional, click on the Collaborate menu and click on the Project Center menu item. When you first do this, though, you may receive the following window:

Information from Project Server <http://einstein/pwa> cannot be displayed inside Project because you have not identified <http://einstein/pwa> as a trusted site in Internet Explorer.

Project cannot display pages from untrusted sites. If you are sure of the identity of the site <http://einstein/pwa>, and you trust that it is a valid Project Server site and it will not attempt to damage your computer or your data, then it is recommended that you make this a trusted site.

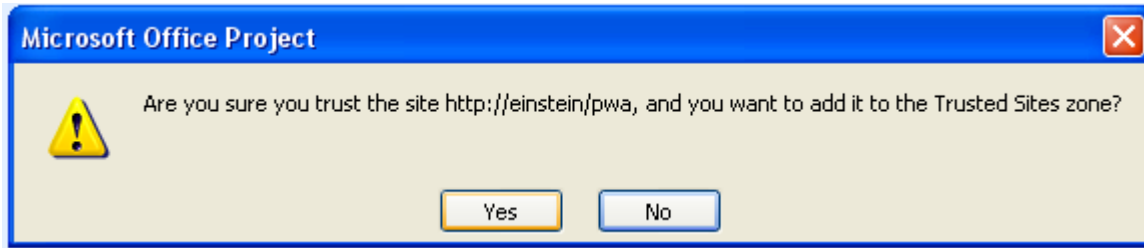
Note that when you trust a site, you are trusting the entire domain to which that site belongs. For example, if you trust the site <http://server1/projectserver>, you are trusting the entire <http://server1> domain.

[Retry accessing the Project Server - http://einstein/pwa](#)

You can turn off the check for the Trusted Sites from the Security tab in the Options dialog box. [Click here to access the Trusted Sites settings.](#)

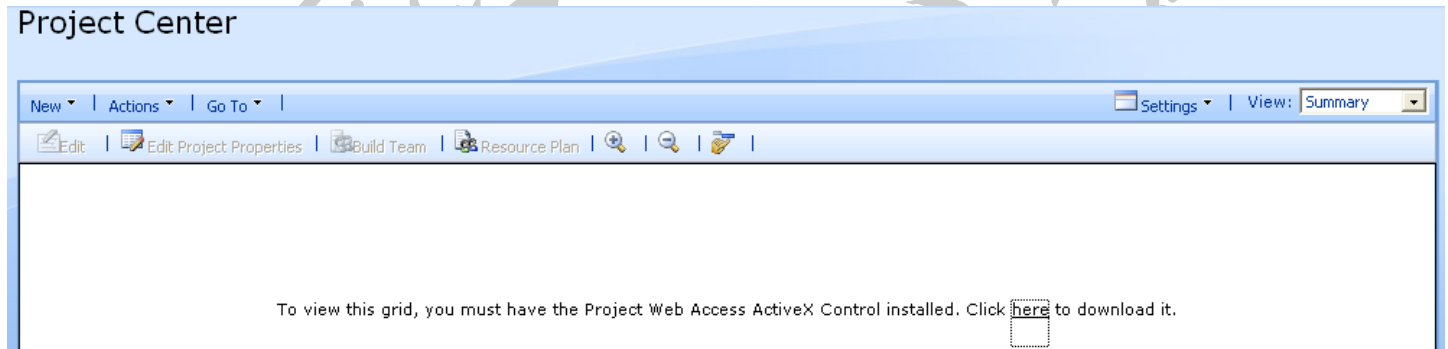
This setting is applicable to Project Web Access and Project Workspace pages only.

To make the server trusted, click on the Make Server Trusted button. You may receive the following pop-up dialog box:



Click Yes. Next, click the *Retry accessing the Project Server* link to access the Project Center.

Depending on your security settings, you may need to download ActiveX Controls to your computer. If this is the case, you will receive the following message:

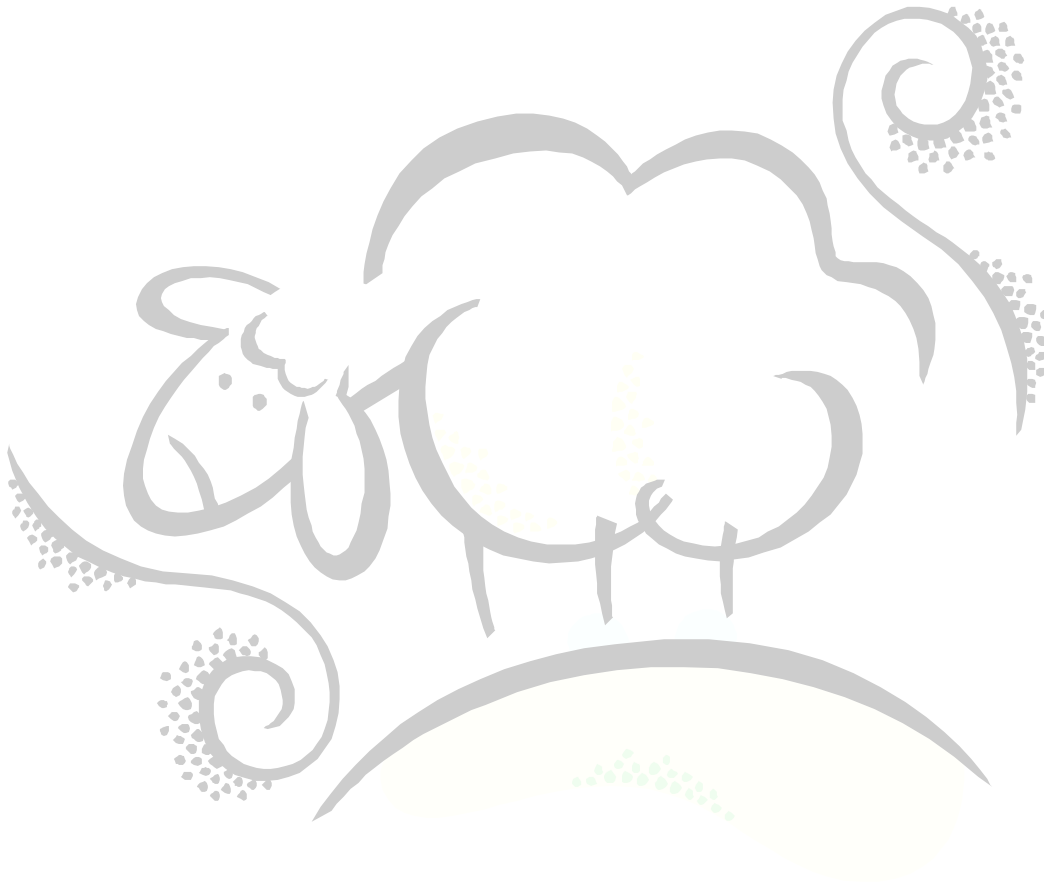


Click on the word "here" to start the download. Once complete, you will be brought to the Project Center web page brought down from the Project Server 2007 machine. Note that if you wish to exit out of this view, click on the *Click here to close this view* link on the upper right corner of your screen.

References

Click on the links below to see more information on Amazon.com's website.

1. [Microsoft Office Project Server 2007 Unleashed](#) by QuantumPM (ISBN-13: 9780672329210)
2. [Implementing and Administering Microsoft Office Project Server 2007](#) by Gary Chefetz and Dale Howard (ISBN-13: 9781934240076)



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