Project Management for SharePoint 2007 Solution Setup

Design Planning

It is recommended that the Project Management solution be implemented as a dashboard with multiple project workspace sites related to the dashboard. However, this is not the only option. When working with this solution, you have four setup options:

1. The project sites can be a physical hierarchy. The dashboard is a parent site, and the project workspaces are sub-sites of the dashboard.
2. The project sites are distributed and not necessarily created under the dashboard. In this case, you take advantage of the "based on directory list" option when configuring web parts.
3. A combination of the above.
4. Use the project workspaces without a dashboard. These instructions do not specifically cover this scenario. However, if you choose to do this, you can read through the steps below and whenever something must be set up to point to or read data from the dashboard, either remove the web part or set it up to point to a list you create within the site.

No matter which option you choose, ***it is recommended that you avoid repeating this set up every time by doing the following***:

1. Create one site from the site template for Project Workspace, and/or one site from the site template for Project Workspace Advanced.
2. Modify the site by following the configuration steps below.
3. Save the site as a template. This template will have the correct URLs for your environment.
4. You may wish to have your IT administrator remove the original CorasWorks project site templates from the available list when creating a site and replace them with your updated Site Templates. (This will depend on how widespread the use of your updated Project Management solution is within your organization.)
5. Change the Tech Admin | Workplace Wizard page on the dashboard so that the blueprint XML uses the new workspace site template(s) you created. Or, you can uncheck the Display option in the Cascading Navigation list for the Workplace Wizard page so that it does not display, and instead create workspaces manually without using the Workplace Wizard.

Setup

A basic knowledge of how to administer SharePoint and how to set up CorasWorks web parts will be helpful in making the changes specified below. If more instruction is needed, refer to the CorasWorks Capabilities Guide.

Task	Description
Create Sites	• If you have created a CorasWorks Workplace Manager site, use that to create a Project Management solution (under Business Solutions | Project-Oriented). OR • Create the site from the CorasWSC.ProjectDashboard.v9.0.1 template. • Then, access the Tech Admin | Workplace Wizard tab and create one

<table>
<tr><th>Task</th><th>Description</th></tr>
<tr><td></td><td>Project Workspace sub-site and one Project Workspace Advanced sub-site.</td></tr>
<tr><td colspan="2">Setup for Both Project Workspace and Project Workspace Advanced</td></tr>
<tr><td>Messages from Dashboard Web Part</td><td>On the Home tab, update the Messages Cascaded from Management Dashboard web part as follows:

From the web part menu, select Actions | Show Admin
On the Sites & Lists tab, in the Site URL box, type the URL of the dashboard site and then click Add URL
In the List Selection Settings under Available Lists:, select the Messages list from the dashboard site
</td></tr>
<tr><td>Add Project Entry to Dashboard Action</td><td>
Go to the Tech Admin | Actions Wizard page
Edit the Add project entry to Dashboard action
In the Configure Action Definition section, add the URL of the dashboard site, then select the Project Workspaces Directory list. Make sure the Use List Specified Above radio button is selected
Fill in the column definitions as shown below (if not already done). It is important that no boxes are checked except those noted.

<table>
<tr><th>Name of Column</th><th>Value</th></tr>
<tr><td>Site URL</td><td>Enter in textbox:
http://[CurrentSiteURL]</td></tr>
<tr><td>Project Name</td><td>Check left checkbox</td></tr>
<tr><td>Project Summary</td><td>Check left checkbox</td></tr>
<tr><td>Due Date</td><td>Check left checkbox</td></tr>
<tr><td>Budget</td><td>Check left checkbox</td></tr>
<tr><td>Project Manager</td><td>Check left checkbox</td></tr>
<tr><td>Current</td><td>Check left checkbox</td></tr>
<tr><td>Category</td><td>Select from drop-down:
Project</td></tr>
<tr><td>Title</td><td>Enter in textbox:
[CurrentSiteTitle]</td></tr>
</table>

Save the action
</td></tr>
<tr><td>Remove Datasheet Views if Not Using MS Excel</td><td>Complete this step only if your users do not have MS Excel
Under the Tasks tab, there is a page for “Bulk Create or Update.” This page contains an MS Datasheet view web part. If your users do not have MS Excel, go to the Cascading Navigation list and remove the check mark from the Display column so this page is not displayed.</td></tr>
<tr><td>Fix the Bulk Create or Update page</td><td>If you left the Bulk Create or Update page intact (did not follow the step above):
Due to a known issue with Microsoft SharePoint Site Templates and List View web parts, the proper columns may not display on the Bulk Create or Update page. To fix it:
In the Project Workspace site:

Go to the Tasks and Issues > Bulk Create or Update Tasks and Issues page
</td></tr>
</table>

Task	Description
	• On the Tasks and Issues web part, select Modify Shared Web Part from the web part menu. • Under Selected View, select Edit Mode. • Click OK. **For Project Workspace Advanced site:** • Go to the Schedule, Tasks > Tasks and SubTasks Create or Update > Bulk Create or Update page. • Repeat the steps above for both the Bulk Create or Update Tasks and Bulk Create or Update SubTasks web parts.
Setup for Project Workspace Only	
Configure Chained Actions	Go to the Tech Admin | Actions Wizard tab. **If using Central Configuration:** • Click Maintain Global Links • Add a Global Link with the Name [ProjectWS]. For the URL, use the URL of the current site • Click Submit **If NOT using Central Configuration:** • Edit the action named Request update and email assignee. In the Configure Action definition section, set Action 1 to Request Update from Assignee. Set Action 2 to Email.
Update MS web part on Files tab	Due to a known issue with Microsoft SharePoint Site Templates and List View web parts, the web part used to display the New and Upload buttons on the Files page may not display correctly. To fix it: • Go to the Files tab • Select Site Actions | Edit Page • On the Add Project files web part, select Modify Shared Web Part from the web part menu. • For Toolbar Type, make sure Full Toolbar is selected. • Click OK • Again, select Site Actions | Edit Page , then Modify Shared Web Part from the Add Project files web part • Under Selected View, click Modify current view. On the view settings page, uncheck all columns except Name or Description and set the Filter so that the Name field is equal to "Filter to nothing." • Click OK.
Setup for Project Workspace Advanced Only	
Update MS web part on the Resources page	Due to a known issue with Microsoft SharePoint Site Templates and List View web parts, the proper column may not display on the Resources web part on the People, Cost > Resources page. To fix it: **In the Project Workspace site:**

Task	Description
	• Go to the People, Cost > Resources page • In the left margin, there is a web part called Resources. Select Modify Shared Web Part from the web part menu. • For Toolbar Type, select Summary Toolbar • Under Selected View, select Display. • Click OK.
Set up web part connections on Resources page	The Resources web part is intended to be a Connected web part with the Resource's Task: Timeline and the Task Efforts web parts on the Resources page. The connections to these two web parts will also have to be set up. • Go to the People, Cost > Resources page • From the Resources web part menu, select Modify Shared Web Part. • After the page refreshes, again open the web part menu and select Connections. • Set up a connection to the Resource's Task: Timeline web part, making that web part consume the Resource column. • Then, repeat to set up Task Efforts web part to also consume the Resource column
Setup for Project Dashboard Only	
Add project Sites to Project Workspaces Directory list	For a project to appear properly in the dashboard, it must be added to the **Project Workspaces Directory** list. This can be done using the action that was configured in the workspace sites, as instructed above. It can also be done manually by typing the project workspace URL and other information into the list.
Configure Workplace Inbox Actions	*Complete this step if your organization uses the Workplace Inbox solution.* Go to the Tech Admin | Actions Wizard tab. **If using Central Configuration:** • Click Maintain Global Links • Add a Global Link with the Name [WorkplaceInbox]. For the URL, use the URL of the Workplace Inbox solution site for your organization. • Click Submit **If NOT using Central Configuration:** • Edit the Add Task to Workplace Inbox action. Add the site and select the list for the Workplace Inbox solution for your organization. • Do the same for the Add Document to Workplace Inbox action

Steps to establish a New Project Workspace

- As noted in the Design Planning section of this document, once you have completed the above steps for a Project Workspace or Project Workspace Advanced, save it as a site template where it will be available from the Site Template Gallery for your site collection.

- Under the Project Dashboard, create a new site. For the site template, select the Project Workspace template you created.
- In the new workspace, go to the Project Maintenance tab and update the project information in the Project Summary list.
- Run the Add project entry to Dashboard action.

Security Setup

Task	Description
Project Dashboard Site Groups	How security permissions are set up depends on your organization and the sensitivity of your projects, but here is a good way to start: • **Members (Contribute):** Make everyone in the organization who may be involved in any project a Member of the Dashboard site. • **Owners (Full Control):** Assign at least two people, one to be the primary administrator and one as a backup. Once they have been trained on SharePoint and the project management solution, you will probably want to assign project managers to the Site Owners group so they can create lists and make project-specific updates. • **Permission Inheritance:** All Project Workspace sub-sites should inherit security from the Dashboard. • Give project workspace sites unique permissions as needed to allow the Project Manager to restrict read access, or more freedom to make changes.

Additional Implementation Options

Consider changing more web parts in the Dashboard to use the Based on Directory List setting. Over time, as projects in your hierarchy are completed, this will allow you to easily filter out inactive project sites. This will also allow you to view projects in the dashboard that do not physically reside under the dashboard in the SharePoint site hierarchy.

Use the Time Tracking solution and configure it to get its list of projects from the Project Workspaces Directory list in the Project Dashboard. Then, add web part views of weekly time charges recorded in Time Tracking to the individual project workspaces and/or to the Dashboard to easily see how many actual hours each project has taken.

If your organization uses the Vacation Approval and/or Training Approval solutions, add a Shared Calendar page with all vacation and training to the dashboard. This will allow project managers and resource planners to look ahead and plan workloads and project schedules.

Technical Reminders

Assumption: Your organization has imported user names and email addresses to the SharePoint user information. If not, some of the automated emails in this solution will not work.