

Project Management 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	<ul style="list-style-type: none">• If you have created a CorasWorks Workplace Manager site, use that to create a Project Management solution (under Business Solutions Project-Oriented). OR <ul style="list-style-type: none">• Create the site from the CorasWSC.ProjectDashboard.v8.0.1 template.• Then, access the Tech Admin Workplace Wizard tab and create one

Task	Description																				
	Project Workspace sub-site and one Project Workspace Advanced sub-site.																				
Setup for Both Project Workspace and Project Workspace Advanced																					
Messages from Dashboard Web Part	<p>On the Home tab, update the Messages Cascaded from Management Dashboard web part as follows:</p> <ul style="list-style-type: none"> 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 																				
Add Project Entry to Dashboard Action	<ul style="list-style-type: none"> 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 border="1" style="width: 100%; border-collapse: collapse;"> <thead> <tr> <th style="text-align: left;">Name of Column</th> <th style="text-align: left;">Value</th> </tr> </thead> <tbody> <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> </tbody> </table> <ul style="list-style-type: none"> Save the action 	Name of Column	Value	Site URL	Enter in textbox: http://[CurrentSiteURL]	Project Name	Check left checkbox	Project Summary	Check left checkbox	Due Date	Check left checkbox	Budget	Check left checkbox	Project Manager	Check left checkbox	Current	Check left checkbox	Category	Select from drop-down: Project	Title	Enter in textbox: [CurrentSiteTitle]
Name of Column	Value																				
Site URL	Enter in textbox: http://[CurrentSiteURL]																				
Project Name	Check left checkbox																				
Project Summary	Check left checkbox																				
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Budget	Check left checkbox																				
Project Manager	Check left checkbox																				
Current	Check left checkbox																				
Category	Select from drop-down: Project																				
Title	Enter in textbox: [CurrentSiteTitle]																				
Remove Datasheet Views if Not Using MS Excel	<p><i>Complete this step only if your users do not have MS Excel</i></p> <p>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.</p>																				
Setup for Project Workspace Only																					
Configure Chained Actions	<p>Go to the Tech Admin Actions Wizard tab.</p> <p>If using Central Configuration:</p> <ul style="list-style-type: none"> Click Maintain Global Links Add a Global Link with the Name [ProjectWS]. For the URL, use the 																				

Task	Description
	<p>URL of the current site</p> <ul style="list-style-type: none"> Click Submit <p>If NOT using Central Configuration:</p> <ul style="list-style-type: none"> 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.
Setup for Project Dashboard Only	
Update Web Parts that are Based on the Project Workspaces Directory List	<p>Almost all the web parts under the Project Manager tab are configured with the “Based on Directory List” setting. Go to each page under Project Manager, and do the following for each web part:</p> <ul style="list-style-type: none"> On the web part menu, select Actions Show Admin On the Sites & Lists tab, in Directory List Name drop-down, select Project Workspaces Directory For the Directory List View, select Current Projects I Manage Click OK
Configure Workplace Inbox Actions	<p><i>Complete this step if your organization uses the Workplace Inbox solution.</i></p> <p>Go to the Tech Admin Actions Wizard tab.</p> <p>If using Central Configuration:</p> <ul style="list-style-type: none"> 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 <p>If NOT using Central Configuration:</p> <ul style="list-style-type: none"> 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
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Project Dashboard Site Groups	<p>How security permissions are set up depends on your organization and the sensitivity of your projects, but here is a good way to start:</p> <ul style="list-style-type: none"> • Contributor: Make everyone in the organization who may be involved in any project a Contributor in the Dashboard site. • Administrator: 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 Administrator 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.
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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.