# Creating a SharePoint Tasks List Project

When detailed schedule and resource management are not required, or for a simple project, we recommend using a SharePoint Tasks List project. This feature allows a project manager to very quickly generate a to-do list of items without requiring all the rigor of a detailed schedule.

Advantages of a SharePoint Tasks List project include:

* Easy to create.
* Provides an alternate indicator in the Project Center.
* Start date, due date and resource assignment fields are optional.
* Limits update methods to done/not done or percent complete.
* If a start date and due date are provided a duration is automatically calculated.
* Can be converted to an enterprise project with a detailed schedule at a later time.

Disadvantages to using a SharePoint Task List project include:

* Tasks with resources and start dates and due dates create a resource utilization of 8 hours per day which cannot be changed.
* Resource is unable to update task from their Tasks or Timesheet page .
* May require some configuration to match the needs of the organization if the SharePoint project may eventually be converted to an Enterprise project.
* Does not include the Project Pro to SharePoint Task link sync feature. This feature is available only when running Project Pro in desktop mode (computer option at startup).

How to create a SharePoint Task List project:

1. In the Quick Launch menu, click Projects.
2. On the Projects tab, in the Project group, click the New dropdown and then click SharePoint Tasks List. Notice the Quick Launch menu has changed and you are now seeing the Tasks page.

Screen shot

1. SharePoint Tasks Lists Project []

How to navigate out of a SharePoint Tasks List project:

1. In the (SharePoint Tasks List) Quick Launch menu, click Project Details.
2. On the (PWA) Quick Launch menu, click Projects.

Screen shot

1. Using the Quick Launch to Navigate out of a SharePoint Tasks List Project []

What might seem logical to navigate out of a SharePoint Tasks List actually navigates you back to the Home page of the SharePoint Tasks List not the PWA home page. Advisicon recommends you practice the above steps until they become familiar to you.

How to edit a SharePoint Task List project:

1. In the Quick Launch menu, click Projects.

Screen shot

1. Editing a SharePoint Tasks List Project from the Project Center []
2. On the Project Center page, click on the name of the SharePoint Task List project. Notice that you are placed on the Tasks page and can immediately begin editing.

# Setting up the Project Professional Connection to PWA

Project Pro can support running in local computer mode or connected to Project Server mode. Since we want to take advantage of connected mode for all functions in this book, there is a one-time setup required.

How to set up the PWA account in Project Pro:

1. Launch Project Pro.
2. On the File tab, click Info and then click Manage Accounts.
3. In the Project Web App Accounts dialog box, click Add.

Screen shot

1. Project Web App Account Dialog Box []
2. In the Account Properties dialog box, type the Account Name and Project Server URL.
3. If desired, click the checkbox to Set as Default Account and then click OK.
4. In the Project Web App Accounts dialog box, click OK.

Laptop users may want to leave “choose an account” enabled in case you want to run in “computer” mode when not connected to your organization’s network.

1. Restart Project Pro.
2. In the Login dialog box, ensure the newly created account name is selected as the Profile and click OK.
3. If required, you will be prompted for a login and password to Project Server.
4. You are now ready to use Project Pro connected to PWA.

Project Pro supports multiple connections to different PWA instances. For organizations with strict security requirements between divisions, this could be a useful feature.

# Differences Between Scheduling in PWA and Project Professional

PWA scheduling is kind of like running Project Pro “light” as the PWA features represent a subset of the features available in Project Professional. Task creation, task management and simple resource assignments are well suited for PWA scheduling. It provides a very fast and efficient method of making changes. However, PWA scheduling lacks the full functionality of Project Pro and is not suited for very detailed schedule functions such as advanced task and resource configuration, configuring personalized views, and running advanced schedule analysis features (including task inspector, leveling, and team planner view).

There is a cost savings to an organization in providing PWA scheduling features only instead of also providing Project Pro.

# Creating New Projects in PWA

Creating projects in PWA is simply a matter of choosing what you need from a dropdown list. This approach provides two project options – enterprise projects or SharePoint task list projects (see Creating a SharePoint Tasks Lists ProjectIn a new install of Project Server, these project types do not contain any default data. Most organizations recommend starting projects in PWA because organizational standard fields and options are displayed immediately. This could also be a good choice when a project management process is being modeled.

The list of projects is configured by each organization and may include a combination of Enterprise and SharePoint Tasks List projects. The list typically spills over into a pop-up sublist. Schedule templates and custom pages that are displayed after selecting a project type are configured by each organization.

How to Create a New Enterprise Project in PWA

1. In the Quick Launch menu, click Projects.
2. On the Projects tab, in the Project group, click the New dropdown and then click Enterprise Project.
3. On the Project Details page, fill in the desired fields of information.

The Project Details page contains fields that are important for reporting in PWA. The list of fields will vary based on the configuration by your administrator.

Screen shot

1. Project Details Page for an Enterprise Project []

A field with an asterisk symbol must be filled in before you can save the changes to the page.

1. On the Project tab, in the Project group, click Save. Notice the processing message on the upper right side of the window. You should wait until the Save is complete before performing another action.
2. On the Project tab, in the Project group, click Close.
3. In the Check In dialog box, ensure Check it in is selected and click OK. Notice you have been returned to the Project Center and your project is listed.

# Checking Out and Checking In Projects in PWA

Only the owner of a project can check it out in PWA and make changes to it. Team members can view read-only project details via the Project Center unless blocked by the administrator.

Hyperlinking on the project name and then choosing Edit on any of the project pages is how you check out the enterprise project in PWA. Choose Close on any of the pages to check in the project in PWA.

How to check out and check in an enterprise project:

1. In the Quick Launch menu, click Projects.
2. On the Project Center page, click on the name of the enterprise project.
3. In the Quick Launch menu for the selected project, click Schedule.

Screen shot

1. Project Group on the Task Tab []
2. On the Task tab, in the Project group, click Edit and then click In Browser.

The status line provides a reminder to you if the project is currently checked out or not.

For projects that are open, each link on the top left side of the quick launch is a page available to that project. Notice that the Schedule is also listed as a page. Pages are turned on or off at the discretion of the administrator for each type of project.

Warning – Clicking the back button on the browser will navigate to the Project Center but will not check in the project. Click on the name of the project to hyperlink back to the checked out project and click Close to check it in.

# Checking Out and Checking In Schedules in Project Professional

Like PWA, only the owner of a project can check it out in Project Pro and make changes to it. You should use Project Pro when detailed and advanced scheduling functions are required. Team members typically do not have access to the schedule in Project Pro.

Opening the project in Project Pro gives you the ability to check it out and closing the project gives you the option to check it back in.

To check out a schedule in Project Pro:

1. Launch Project Pro.
2. On the File tab, click Open and click the PWA account name and click Browse.
3. In the Open dialog box, double-click Show me the list of all projects.
4. Select the desired project name and click Open. Notice the project is displayed in read-only mode by default. Click Check Out on the status line to allow edits to the schedule.

If needed, you can modify the fields that are shown on the Project Details page in PWA in Project Pro by using the Project tab, Properties group, Project Information button.

Projects are cached locally each time they are opened in Project Pro. This will speed up opening the project next time. You should clean up the cache on a regular basis as a best practice or if you begin to have difficulty checking out the project. Cleaning up the cache is covered in Managing Project Manager Preferences.

To check in a schedule in Project Pro:

1. On the File tab, click Close.
2. In the Close dialog box, select Save (if required), select Check it in and then click OK.

# Saving Versus Publishing Changes

While you are editing projects, you have the option to save and the option to publish. It is important to learn the purposes of these two options.

* Save – You should save schedule changes when you are in a planning mode and not ready to share the schedule globally. An example of when saving is appropriate is when you anticipate it will take several days to fully develop the schedule and you do not want feedback until you have finished creation of the schedule.
* Publish – You should publish the schedule when you want schedule changes to be visible in the Project Center, when you want resources to receive their assignments, or when you want to synchronize information between Project Pro and PWA. Publishing also calculates the schedule in PWA. Auto-calculation in turned on in Project Pro. As a shortcut, publishing your project also does a save.

It is a best practice to wait until Saving and Publishing are completed before closing and checking in your project. In PWA, the processing indicator appears in the upper right side of the screen. In Project Pro, the processing indicator appears in the lower right side of the screen on the status bar.

Refer to Publishing Task Assignments in Resource Management in Project Pro and refer to Publishing Task Assignments in Resource Management in PWA for more details about how publishing relates to resource assignments.

An exception to publishing is enterprise fields on the Project Details page in PWA which are discussed in Creating New Projects in PWA. They do not need to be published to be visible to others. An example of this exception is that enterprise fields can be displayed in columns in the Project Center.

How to save in PWA:

1. The schedule you wish to save and publish should already be open and checked out.
2. In the Task tab, Project group, click Save.

How to publish in PWA:

1. The schedule you wish to save and publish should already be open and checked out.
2. In the Task tab, Project group, click Publish.



1. Publishing the Schedule in PWA [Publishing the Schedule in PWA Large.tif]

How to save in Project Pro:

1. The schedule you wish to publish should already be open and checked out.
2. Click the File tab to display backstage view and click Save.

How to publish in Project Pro:

1. The schedule you wish to publish should already be open and checked out.
2. Click the File tab to display backstage view.
3. On the Info tab, click Publish.



1. Publish in Backstage View [Backstage Publish.tif]

Be sure to watch the status of publishing on the status bar in the lower right corner. Wait until publishing is 100% complete to ensure the data has been fully synchronized with PWA.

# Building a Schedule in Project Pro

Refer to our book [MPwMP2013-Fundamentals](https://intranet.advisicon.com:447/dept/Authoring/MPwMP2013Fundamentals/Forms/AllItems.aspx)

# Building a Schedule in PWA

After the project is initiated, the next steps will be to edit and create a complete project plan. You can insert new tasks, organize them into phases, link them, create milestones, assign resources, etc. All this functionality is available through the browser.

Refer to Resource Management in PWA for information about assigning resources.

You will continue to use Project Pro for more advanced project planning and tracking features such as viewing task warnings and suggestions, accessing Team Planner view, configuring task type and effort-driven settings, setting selected baselines, and moving tasks during tracking, However, for basic project plan editing and manipulation, PWA will serve as a great complement to Project Pro for project managers.

## Manual Scheduling vs Auto-Scheduling

In developing your schedule and entering tasks, you will need to decide what mode you need for each task. PWA provides flexibility for project managers in developing schedules with the option of setting the task mode to manual or auto-scheduled**.** Historically in Project Pro 2007, PWA 2007 and all earlier versions, all tasks were auto-scheduled. Auto-scheduled tasks are controlled by Project’s scheduling engine where specific information is calculated for you, such as the Start and Finish dates. This approach was best in creating fully planned project tasks.

However, many times a project begins with an informal lists of activities. These activities are at a very high level and do not have all the details available, such as the duration or list of predecessors. In many cases the project manager is awaiting information from project stakeholders. Such activities are best suited for manual scheduling. These tasks are essentially ignored by Project’s scheduling engine.

Manual scheduling gives complete flexibility to the project manager in terms of information to be entered in the Duration, Start Date, and Finish Date columns. When you create a manually scheduled task, the Duration, Start Date, and Finish Date columns turn into text supported columns so you can enter any information you need such as “Mid June” or “Pending Mgmt Approval.” Unlike auto-scheduled tasks, manually scheduled tasks containing text details will not be modified when changes are applied to the overall schedule. Manually scheduled tasks serve as a visual reminder that further data is required before these tasks will be incorporated into the project schedule.

Manually scheduled tasks will begin to calculate information when you enter information that is recognizable by Project. For example, if you enter a Duration value and then link to another task, the Start Date and Finish Date columns will calculate.

For a detailed discussion about linking with manually scheduled tasks, refer to [MPwMP2013-Fundamentals](https://intranet.advisicon.com:447/dept/Authoring/MPwMP2013Fundamentals/Forms/AllItems.aspx).

To enter a task and change its task mode in PWA:

1. Ensure that your project is checked out in Browser and you are on the Schedule page in PWA.
2. In an available blank cell in the Task Name column, enter the name for the task and press Enter. Repeat as needed.

The cursor moves onto the next row indicating that you can continue entering another new task.

screenshot

1. Manual or Auto-schedule Option []
2. Select the desired task(s) and on the Task tab, in the Editing group, click Manually Schedule or Auto-schedule as desired.

If the task is in Auto-Schedule mode, the Duration, Start Date and Finish Date columns will automatically populate. Duration, by default, will equal 1 day (1d) and the start and finish dates will correspond to the project start date.

If the task is in Manually Scheduled mode, the Duration, Start Date and Finish Date columns will remain blank to be filled in manually.

You can also change the task mode by using the dropdown list in the Mode column to the left of each task’s name.

## Inserting and Deleting Tasks

During schedule development, you may discover that you missed a task in your task list or that a task is no longer needed. In these instances, you will need to either insert or delete a task.

To insert or delete tasks in PWA:

1. Ensure that your project is checked out in Browser and you are on the Schedule page in PWA.

* To add a new task in the schedule, select the task below where you want to insert a new task. On the Task tab, in the Tasks group, click Insert.
* To delete a task in the schedule, select the desired task. On the Task tab, in the Tasks group, click Delete.

## Organizing Tasks into Phases

If you initially entered high-level tasks in PWA, you can break the structure down further into subordinate tasks. These are referred to as sub-tasks. When you add a sub-task, the top level task becomes a summary task. Breaking up summary tasks into smaller work units or sub-tasks is called a “top down” approach. You can also follow the “bottom up” approach by first creating sub-tasks and then grouping them under summary tasks.

Summary tasks and sub-tasks provide a great way to organize tasks into phases in PWA.

To organize tasks into phases in PWA:

1. Ensure that your project is checked out in Browser and you are on the Schedule page in PWA.

screenshot

1. Organizing Options []

* Select the desired task(s) below a task that will become the summary task. On the Task tab, in the Editing group, click Indent.
* Select the desired task(s). On the Task tab, in the Editing group, click Outdent.

By default, summary tasks appear in boldface type and the sub-tasks appear in normal type.

You can also select multiple tasks simultaneously and indent them creating a group of sub-tasks at one time. Select multiple tasks by holding down the Ctrl (to select tasks individually) or Shift key (to select a range) and selecting the appropriate tasks.

## Linking Project Tasks

After organizing tasks into phases, the next step is to link dependent tasks. By default, all auto-scheduled tasks will start the day the project starts, which is normally not realistic. If this were true, you would be able to complete all tasks at the exact same time in the project and finish the project very quickly. Usually, some tasks must start or finish before others can begin. A task that occurs before another task is a predecessor task and a task that occurs afterwards is a successor task. Tasks with dependency relationships are noted by linking. In the Gantt chart, the links are presented in the form of lines between two task bars.

PWA provides a shortcut to the most common dependency type used in schedules – Finish to Start. In a Finish to Start dependency, a successor task cannot start until the predecessor task finishes.

To link or unlink tasks in PWA:

1. Ensure that your project is checked out in Browser and you are on the Schedule page in PWA.

screenshot

1. Linking Options []

* Select the desired tasks that you want to link together. On the Task tab, in the Editing group, click Link Tasks.
* Select the desired tasks that you want to unlink. On the Task tab, in the Editing group, click Unlink Tasks.

You can select two or more tasks to link in a series. Use the Ctrl key to select non-adjacent tasks.

The first task you select is the predecessor to the second task. If you select more than two tasks, the predecessor is always the task you click before.