



Managing Projects with MS Project 2010



Session: 15

Connecting and Collaborating



Objectives

- ◆ Describe the tools for collaborating and sharing project schedules
- ◆ Explain how to share project information using SharePoint 2010
- ◆ Explain how to set up and synchronize task lists
- ◆ Describe MS Project Server 2010 and its components
- ◆ Explain how to integrate MS Project Server with MS Project Professional
- ◆ Explain how to set up resource assignment using MS Project Server

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Introduction

- ◆ MS Project 2010 is a project management tool that helps to manage and develop project schedules.
- ◆ It provides several tools for managing resources, tracking the project progress, and generating project reports.
- ◆ Microsoft also provides another very powerful tool called SharePoint 2010 that offers a business collaboration platform for teams to work at an enterprise level or on the Web.
- ◆ A new feature of MS Project 2010 is that it integrates seamlessly with SharePoint 2010 and can be used for collaborative project management.



SharePoint 2010

- ◆ SharePoint 2010 is a collaboration tool from Microsoft that is used to quickly create Web sites that provide a common location for teams to collaborate on Web pages, documents, lists, calendars, and data.
- ◆ Project managers and team members can use SharePoint to create and share project related information, such as task and resources lists, project plans, calendars, and so forth.

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Installing SharePoint 2010

- ◆ To make use of the collaborative features of SharePoint 2010 with Project 2010, SharePoint 2010 must be installed on a server with a database, such as SQL Server.

Following are the system requirements for installing SharePoint:

Hardware:

Hardware that supports a 64-bit operating system and 64-bit database server

Operating System:

64-bit edition of Windows Server 2008 with Service Pack 2 or Windows Server 2008 R2

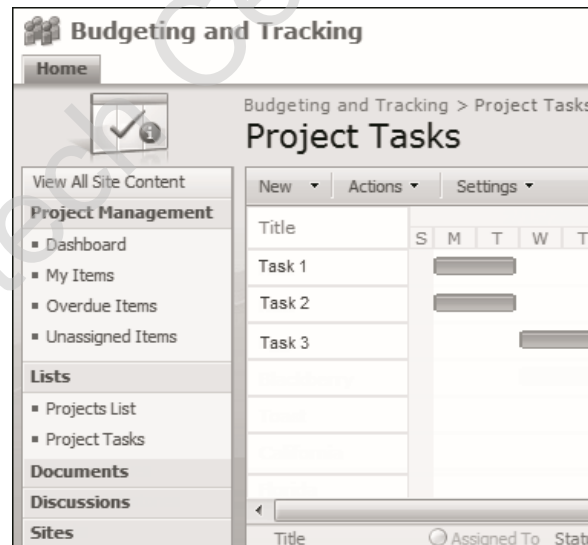
Database:

64-bit versions of Microsoft SQL Server 2005 or Microsoft SQL Server 2008 with appropriate service packs and updates



Connecting Projects to SharePoint

- ◆ After installing SharePoint on the server, a SharePoint site needs to be configured.
- ◆ Each department or project can create its own SharePoint site where the project team can connect and share project information and work collaboratively.
- ◆ This site will serve as a repository for projects and will hold all the project related information to be shared among the project team members.
- ◆ The project team and stakeholders will have controlled access to the components of the SharePoint site.
- ◆ Following figure displays a SharePoint site template that will hold and manage project related information:





Components of a SharePoint Site

- ◆ Before beginning to use SharePoint with MS Project, it is useful to familiarize oneself with the following components of a SharePoint site:

Lists

Libraries

Views

Web Parts



Connecting Teams with SharePoint

- ◆ To make effective use of the collaborative features of SharePoint.
- ◆ Project managers need to identify the members who will be part of the collaborative exercise and the roles that they will take on with respect to SharePoint.

SharePoint identifies the following three roles for its participants:

Managers

Team members

Executives



Creating Tasks List on SharePoint 1-2

- ◆ Once SharePoint is installed on a server and a site is configured, project managers can start creating and sharing project information on the site.
- ◆ They can create a list with project information, such as a task list in the SharePoint site.
- ◆ The tasks list will outline the various tasks and their start and finish dates in the site.
- ◆ There are several templates available in SharePoint that project managers can use to create lists.
- ◆ Following are the steps to create a tasks list using a template in a SharePoint site:

1

- In the SharePoint site for the project, click the **Lists** link on the Quick Launch pane on the left of the window. This displays the **All Site Content** window.

2

- Click the **Create** button on the top of the window to display the **Create** window.

3

- Click the **Tracking** link in the **All Categories** group in the left pane of the window. This displays various types of lists that serve as tracking tools in SharePoint.

4

- Select the **Project Tasks** list.

5

- Enter a name for the list in the **Name** text box to the right of the screen and click **Create** to create a new tasks list.



Creating Tasks List on SharePoint 2-2

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- To add a task to the tasks list, click **Add new item**. This displays the Tasks - New Item window as shown in the following figure:

Home

Libraries

Site Pages

Shared Documents

Lists

Calendar

Tasks

Discussions

Team Discussion

Recycle Bin

Name and Description

Type a new name as you want it to appear in help site visitors use this list.

Name:

External List

Description:

BDC External List

Navigation

Specify whether a link to this list appears in the

Display this list on the Quick Launch?

Data source configuration

Choose the External Content Type to use as 1

External Content Type

- ◆ Users can start entering tasks information, such as name of the task in **Title** column, **% Complete**, **Status**, **Priority**, **Predecessors**, and resource name in the **Assigned To** column.

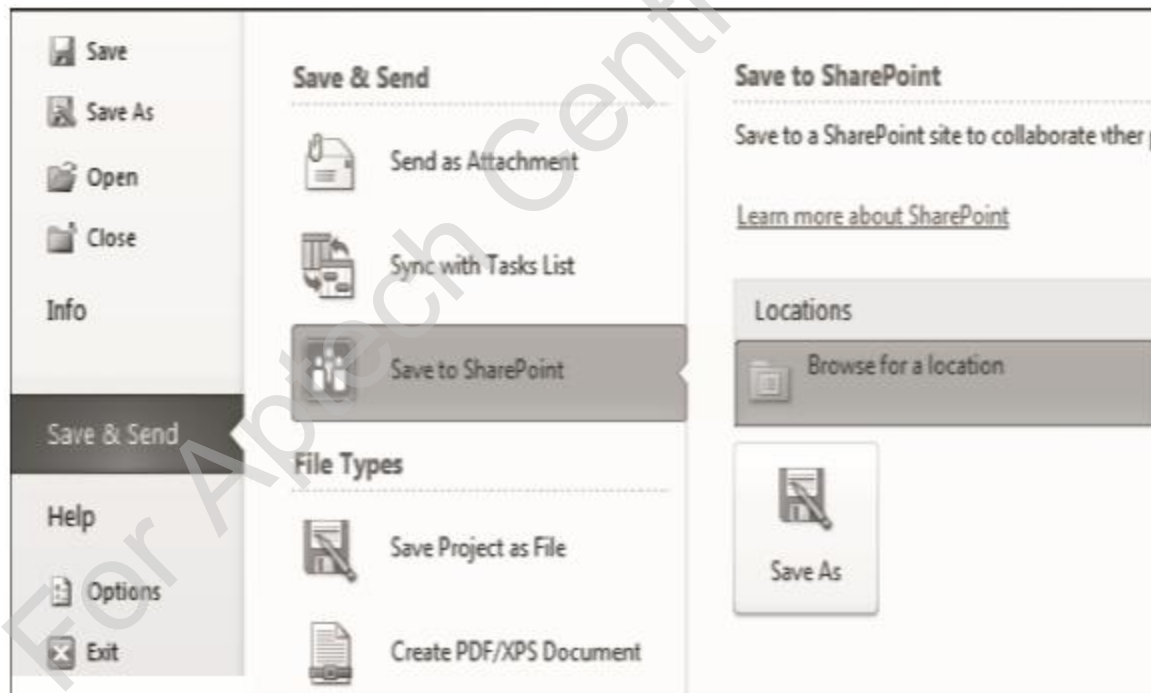


Saving Project Schedules to SharePoint 1-2

- ◆ Apart from creating tasks list on SharePoint site, project managers also can save a project plan to the site.
- ◆ Perform the following steps to save a project file to SharePoint site:

Click the **File** tab to display the Backstage view. Select the **Save & Send** option to display the **Save & Send** screen.

- ◆ Following figure displays the **Save & Send** screen in the Backstage view:





Saving Project Schedules to SharePoint 2-2

Click **Browse for a location** button and choose the SharePoint site where the projects file needs to be saved.

Click **Save As** to display the **Save As** dialog box.

Ensure that the SharePoint location where the file is being saved is correct and click the Save button to **save** the file to the selected SharePoint site.

- ◆ The following is an alternative method of saving an MS Project file to SharePoint site:

Click the **File** tab and select the **Save As** option to display the **Save As** dialog box.

In the folder location box, enter the URL of the SharePoint site and click the adjoining **Go to** button.

Click the **Save** button to save the file to the SharePoint site.



Synchronizing Tasks List in SharePoint with MS Project 1-2

- ◆ SharePoint does not provide scheduling capability. It can only be used to gather, store, and share data.
- ◆ Project managers can just create a skeleton tasks list on SharePoint and pull it into their project file in MS Project.
- ◆ The following are the steps for synchronizing a SharePoint tasks list with MS Project:

1

- Click the **File** tab and select the **Save & Send** option. This displays the **Save & Send** screen to the right, in the Backstage view.

2

- Select the **Sync with Tasks List** option with the **Sync with Tasks List** screen displayed on its right.

3

- In the **Site URL** drop-down list, select or enter the URL of the Task List site on the SharePoint server for the project.

4

- Click the **Validate URL** button. This pulls the names of the existing SharePoint tasks lists into the **Select an existing tasks list, or enter a new name** drop-down list.

5

- Select the tasks list to pull into MS Project, from the **Select an existing tasks list, or enter a new name** drop-down list.

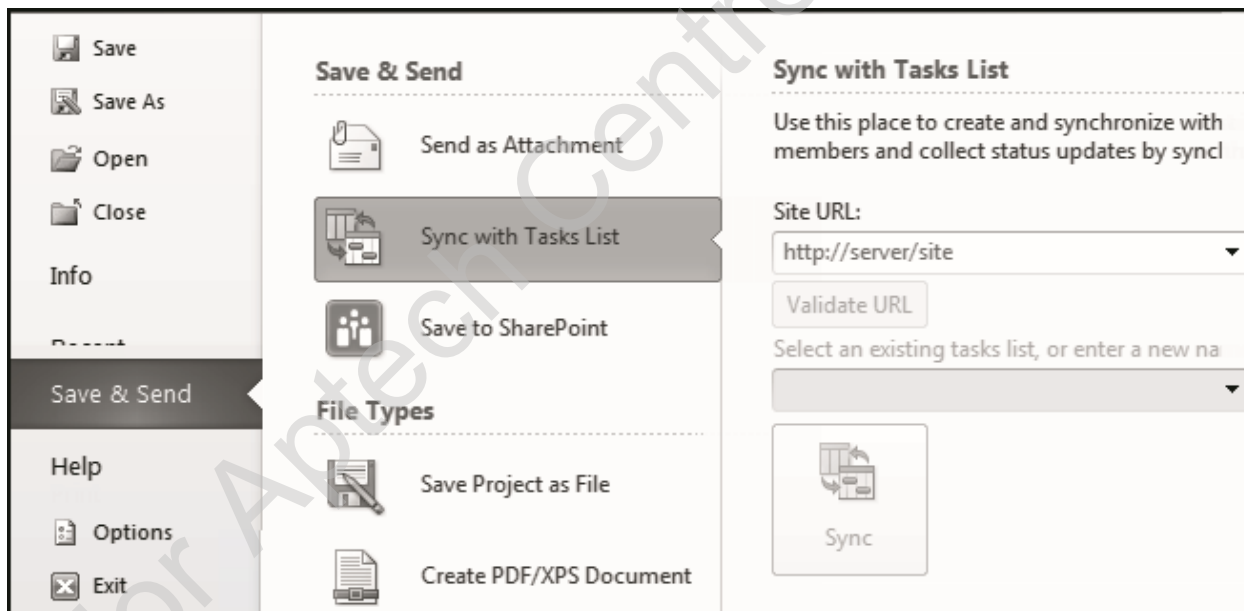


Synchronizing Tasks List in SharePoint with MS Project 2-2

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- Click the **Sync** button to start the synchronization process. A **SharePoint Synchronization** message box with a progress bar is displayed.

- Following figure displays the **Sync with Tasks List** screen in the Backstage view:





Sharing Project Task Lists on SharePoint 1-2

- ◆ A key utility of SharePoint in project management is sharing project tasks list and schedule and gather status updates from the team members.
- ◆ Project managers can publish task list from MS Project to the server.
- ◆ Team members can then update the tasks status regularly on SharePoint.
- ◆ Project managers can pull the updated tasks list from SharePoint into MS Project to update the project status in their project file.
- ◆ Project managers need to follow the same steps as for pulling a tasks list from SharePoint into MS Project.
- ◆ Only, in the **Select an existing tasks list, or enter a new name** drop-down list, they must select the name of the tasks list if it already exists on SharePoint and is only being synchronized.
- ◆ Click **OK** to complete the synchronization process.
- ◆ Clicking **Cancel** will keep the tasks as auto-scheduled tasks and stop the synchronization process.



Sharing Project Task Lists on SharePoint 2-2

- ◆ Following are the steps to perform subsequent synchronization of a tasks list:

Click the **File** tab and select the **Info** option. The **Sync to Tasks List** section on the right displays the timestamp when the tasks list was last synchronized and the URL of the SharePoint site with which it was synchronized.

Click **Sync** to synchronize updates to the list.



Project Server 2010

- ◆ Projects in an organization do not run in isolation.
- ◆ They affect each other in some way or the other to a certain extent.
- ◆ They require sharing resources, calendars, schedules, and so forth.
- ◆ With the increase in the size of projects and the number of projects that an organization handles, this interdependence increases.
- ◆ Storing all the shared resource information at a central location and monitoring their requirement and in the large number projects across the organization will assist in managing all projects smoothly.
- ◆ Project Server 2010 does just that. It enables storing all projects and their resource information in a central database on the company's network.



Project Server 2010 Components

- ◆ Project Server 2010 comprises two main components: Project Server and Project Web App.
- ◆ The Project Server is the back-end of the system that comprises a database and is responsible for managing and maintaining all data of projects in the organization.
- ◆ The Project Web App is the front-end of the system, which provides the user interface in a browser for team members to interact and work with project data.
- ◆ Project Server 2010 requires Microsoft SharePoint Server 2010 Enterprise version to be installed on the server running Project Server and on all Project Web App servers within a network.
- ◆ The project managers, resource managers, and system managers install and use MS Project 2010.
- ◆ The rest of the team connects and collaborates using the Project Web App.



Project Server Functions

- ◆ Project Server acts as a complete collaborative enterprise wide project management platform.
- ◆ Using Project Server and Project Web App with MS Project, it is possible to:

Schedule tasks

Enter and view timesheet information

Assign, accept, and reject task assignments

Update assignments and tasks status with progress information

Receive notices about task status

View a project's Gantt Charts and reports

Send status reports to managers and stakeholders



Connecting to Project Web App

- ◆ Users can launch Project Web App by opening the browser and entering the URL for the Project Server.
- ◆ Users can log in according to their role to display the Project Web App homepage.
- ◆ On logging in as an administrator, the homepage for the administrator is displayed.
- ◆ Users can connect to Project Web App in one of the following three roles, each of which has its own set of permissions to perform project management activities:



- ◆ Depending on the role under which they connect, the contents of the homepage will change.



Connecting to Project Web App as an Administrator

- ◆ The homepage for an administrator contains several links for managing and customizing the Project Server environment and the Project Web App.
- ◆ Following are the various activities that administrators can perform:

Managing Users

Managing Security Settings

Managing Groups

Assigning Categories

Managing Views

Managing Enterprise Templates, Calendars, and Timesheet Settings

Customizing Project Web App Appearance

Managing Project Database



Connecting to Project Web App as a Project Manager

- ◆ Project managers are responsible for creating and maintaining the project schedule and making task assignments.
- ◆ Project managers can either use MS Project 2010 or Project Web App to perform these activities.

Following are the activities that project managers can perform:

**Updating
project
schedule**

**Assigning
resources to a
project**

**Monitor
resource
availability**

**Monitor task
progress**



Connecting to Project Web App as a Team Member

- ◆ Team members can contribute to efficient project management without using MS Project 2010.

They can connect to Project Web App directly through the Web browser and perform the following activities:

**Enter actual
work in
timesheets**

**View their task
assignments**

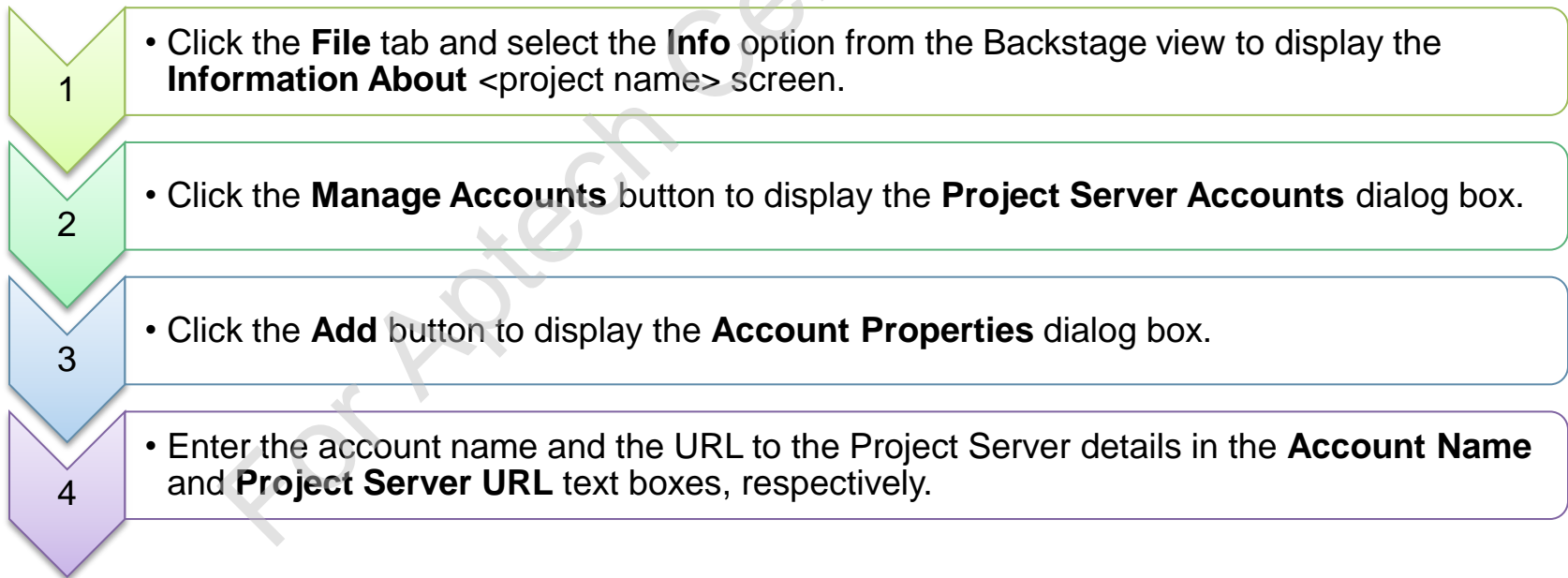
**Send task
updates**

**Send status
reports**



Connecting to Project Server 1-2

- ◆ Project managers can perform most activities from Project Web App.
- ◆ Project managers can connect to Project Server from within MS Project 2010 and manage projects.
- ◆ To connect to Project Server from within MS Project 2010, managers need to create a Project Server account.
- ◆ The following are the steps to create a Project Server account in MS Project 2010:





Connecting to Project Server 2-2

5

- Exit the MS Project 2010 application and restart it to connect to Project Server using the configured account.

- ◆ Once connected, project managers can create a project file, save it, and publish it to the Project Server.
- ◆ Perform the following steps to publish a project file to the Project Server:

Click the **File** tab and select **Info** from the **Backstage** view.

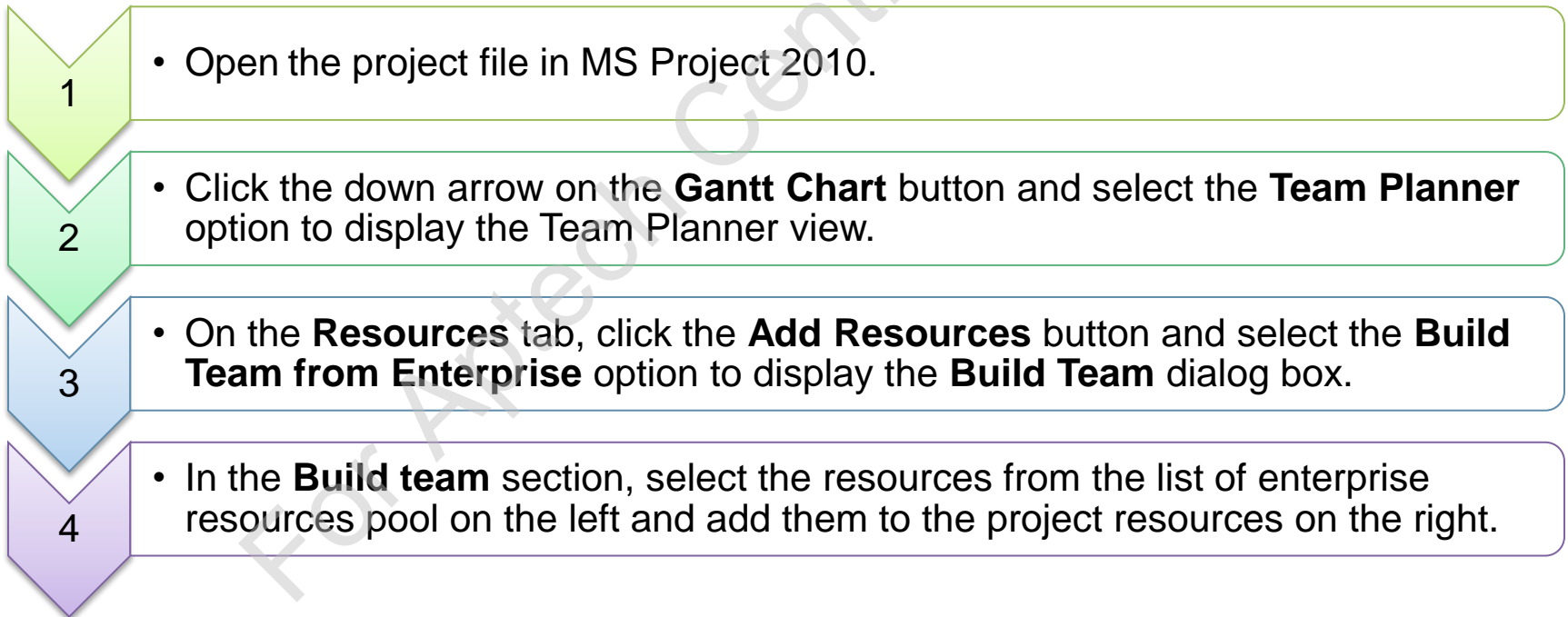
Click **Publish** to publish the project file to the Project Server.

- ◆ To view the published project, in the Project Web App, click **Project Center** under **Projects** in the Quick Launch pane, on the left of the window.



Setting up Resource Assignment 1-2

- ◆ The key function of Project Web App is to enable project interaction between the project team and project manager.
- ◆ Using resources from the resource pool also allows managers to monitor the availability of resources and check any overallocation of resources on multiple projects in the organization.
- ◆ Following are the steps to add resources to a project:





Setting up Resource Assignment 2-2

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- Click **OK** to save the resource assignments.

6

- Publish the file to Project Server to reflect the changes on Project Web App.

- ◆ Project manager can monitor the resource availability and assign tasks to them once the resource is added to the project.
- ◆ The resources added to the project can view their assignments when they log into Web App.
- ◆ They can update timesheets, review and update their tasks status, and send reports to the team managers.



Summary

- ◆ SharePoint 2010 is a collaboration tool for project teams and team members to create and share project related information.
- ◆ After installing SharePoint on a server, one can configure a SharePoint site where the project team can connect and share project information and work collaboratively.
- ◆ Project managers can create and share project information, such as tasks lists and resource list, on a SharePoint site.
- ◆ Project managers can create a skeleton tasks list on SharePoint and pull it into their project file in MS Project, for detail scheduling and designing a complete project plan.
- ◆ Project managers can publish task list from MS Project to the SharePoint site, in which team members can update the tasks status regularly.
- ◆ Project Server 2010 provides a central repository for storing large amount of project information and shared resource information and monitoring their requirement.
- ◆ Project Server is the back-end of Project Server 2010 system that comprises a database and is responsible for managing and maintaining the all data of projects in the organization.
- ◆ Project Web App is the front-end of the Project Server 2010 system, which provides the user interface in a browser for team members to interact and work with project data.