

PlanFurther.com Project Server Workspace Health Indicator Web Part



Installation and configuration manual

www.planfurther.com

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About this Web Part

This Web Part is intended to be added to a Project Workspace on a Microsoft Project Server 2007 environment. This Web Part displays a “stoplight” indicator for workspace visitors and is automatically updated upon project publishing.

The Web Part can also be configured to define what amount of duration can pass before turning from green to yellow and then red.

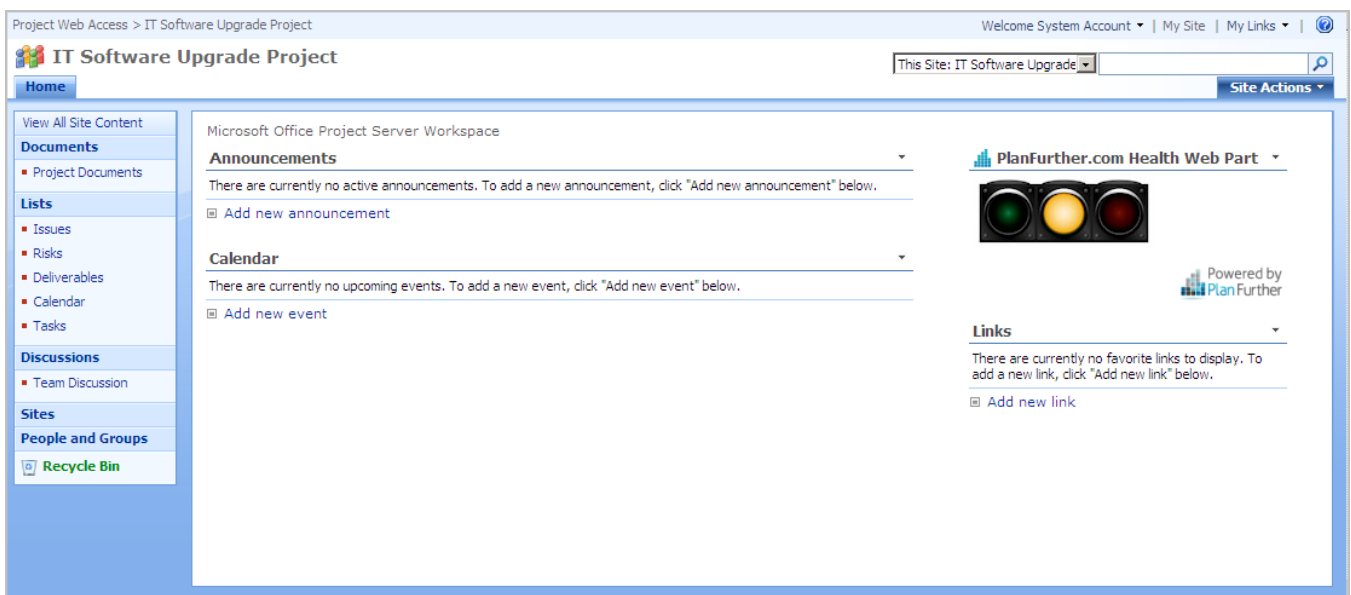
The web part uses the project’s overall “finish variance” field to determine these settings.

This web part also looks for a project baseline and shows a blank stoplight indicator if there is none.

If desired, the Web Part can be added to the Microsoft Project Server SharePoint workspace template. This would ensure that all new projects automatically have this Web Part displayed and pre-configured.

Further customization to your needs is available from the developers at www.planfurther.com.

A workspace with the Web Part added is shown below:



Prior to installing

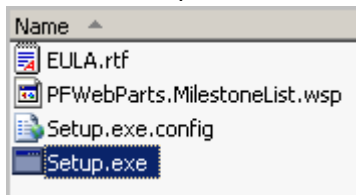
Before installing the Plan Further Milestone Web Part, ensure you have the following configuration, key information and rights:

- A Microsoft Project Server 2007 installation in good working order, ready to have the Web Part installed. As with all software installations, just prior to installation you should perform a backup of the server and databases.
- Microsoft Project Server “Project workspaces” where you wish to add the Web Part.
- Microsoft Project plans (published to Project Server) which contain tasks and baseline data to be displayed in this Web Part.
- The SQL database and instance name hosting the Microsoft Project Server 2007 reporting database. The database should be configured to allow either a **SQL account** or the **Application Pool account** for the workspaces to read the data.
- Administrative access to log in to the server (RDP is fine) and run the Web Part installation on the Microsoft Project Server 2007 server.

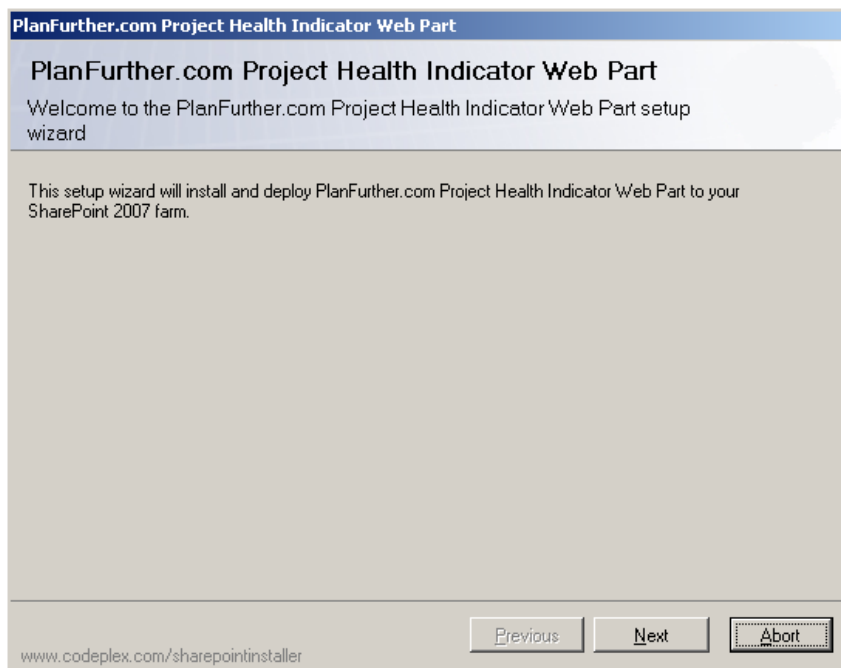
Installation steps

To begin our installation, please ensure that a backup of the server and database is performed. While we do not anticipate any issues with the install, it is always better to be safe by having a very recent backup before any software installation.

1. Unzip the contents of the download to a folder on the server.
2. Find the Setup.exe file and double click to begin the installation.



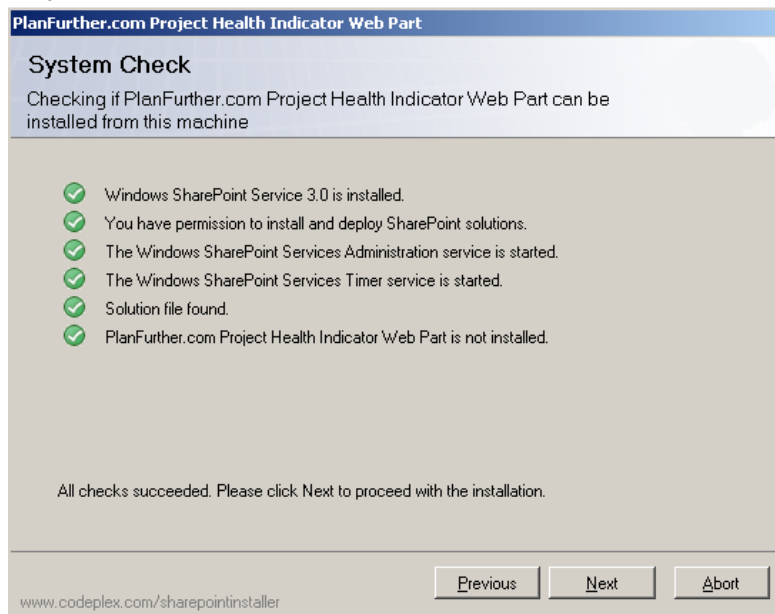
3. This opens the installation dialog for the PlanFurther.com Web Part. Click **Next** to continue.



- Review and click to accept the End User License Agreement. Click **Next** to continue.

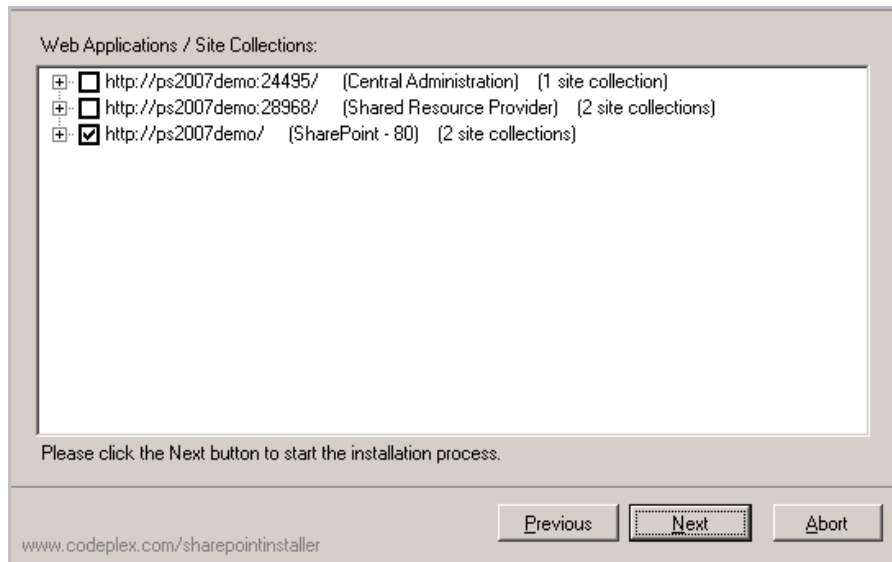
 I accept the terms in the License Agreement

- A system check is performed. Click next to continue.

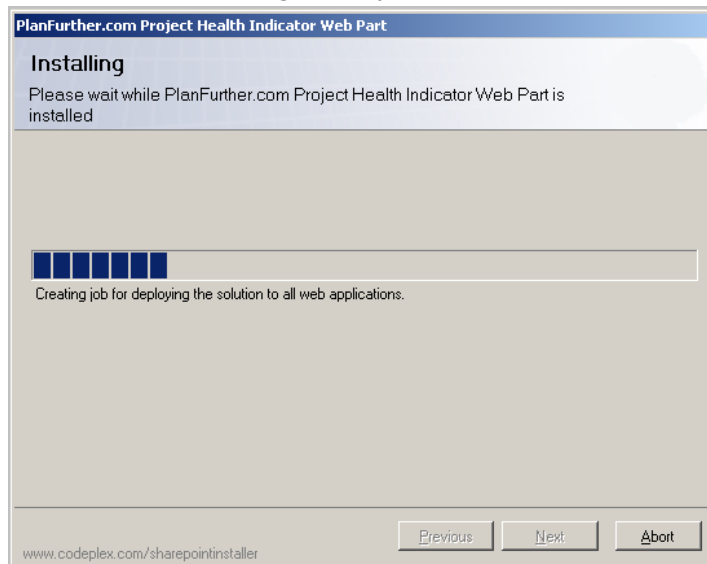


- Select the site collection you wish to associate this Web Part with. Since this Web Part will be used only on the project workspaces created when publishing a project with Project Server 2007, make sure to select that site collection. By default, Microsoft uses the PWA site collection to house these workspaces. Check with your server administrator to be sure of which location to use.

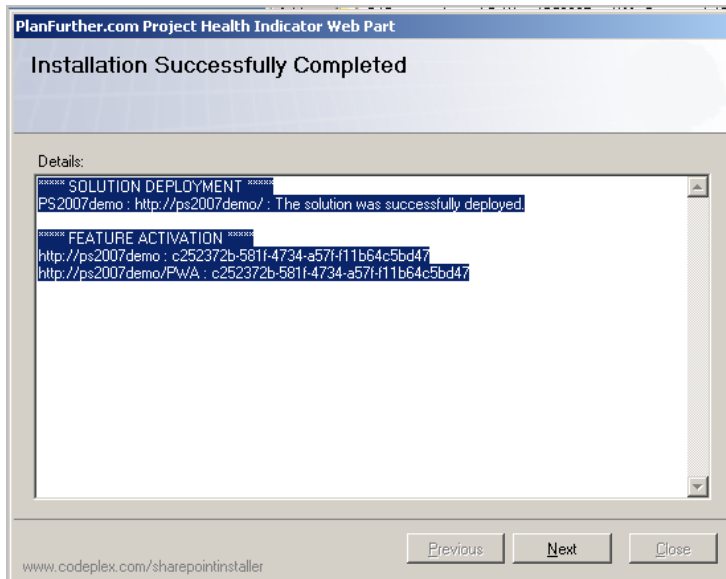
7. Click **Next** to continue.



8. The installation dialog displays the status.



9. The installation concludes and the results are displayed. Click **Next** to continue.

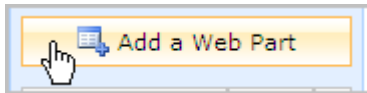


10. Click **Close** to complete the installation.

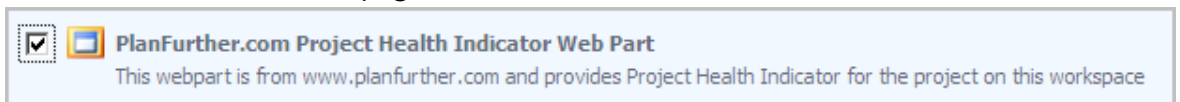
Configuration steps

Once the installation is complete and successful, the rest of the steps can be performed remotely using Internet Explorer 7 or higher. You will need full control privileges to the SharePoint workspace.

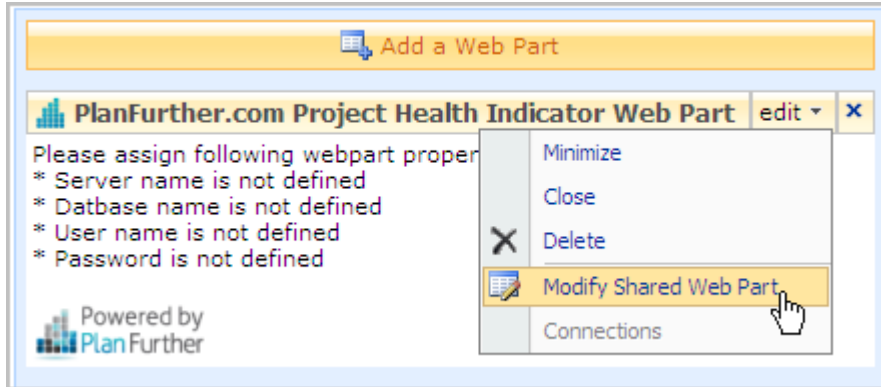
1. Using IE 7 or greater, open the Project Workspace that you wish to test the Web Part on.
2. Click **site actions | edit page** to begin adding the Web Part to the site.
3. Click a newly displayed "Add a Web Part" link.



4. A list of Web Parts is displayed. Find the heading that says **Miscellaneous**. Now find the PlanFurther.com Milestone Web Part and select it. Now click **Add** to add the Web Part to the page.



5. The Web Part is added to the page but a message shows that it still needs to be configured. To configure the Web Part, select the **Edit** drop down menu and choose Modify Shared Web Part.

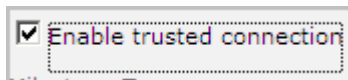


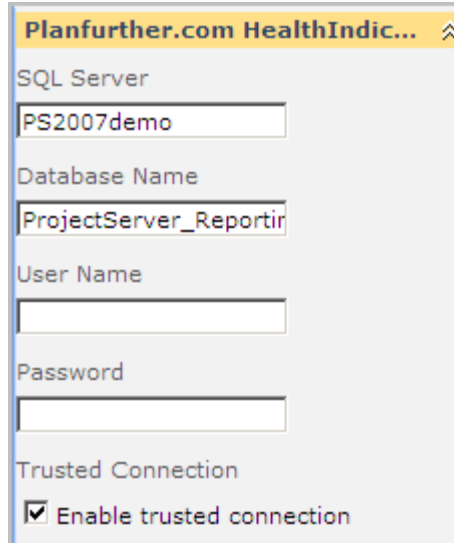
6. The Web Part properties window is displayed on the left hand side of the web page. Supply the server name and instance name (if any) into the SQL Server dialog box. Provide the Project Server reporting database name in the Database Name field.

Before completing the rest of the data, be aware of the type of connection you want to have to your server... either using a **SQL server account** or using the **Application Pool identity** associated with the website. Either of these approaches will require that read access to the reporting database has been granted to the corresponding account.

If you are using a SQL server account, a username and password are required. Enter them where the Username and Password fields are and do not check the "Enable trusted connection" option.

If you are using the Application Pool identity, leave the username and password fields empty and simply click the "Enable Trusted Connection" checkbox.





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SQL Server

Database Name

User Name

Password

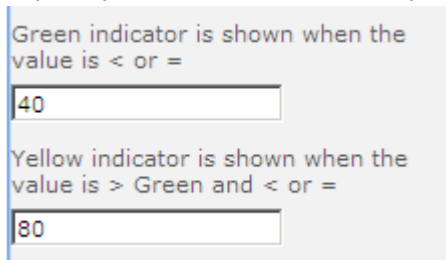
Trusted Connection
 Enable trusted connection

7. Finally, set values for the Green and Yellow indicator. Red is anything beyond the value for yellow.

These numbers are expressed in hours. Typically there are 8 work hours in a day so 5 days would be expressed as 40 hours.

Example:

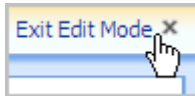
If an organization considers a project green when the project is no more than 5 days beyond baseline finish and yellow when the project is no more than 10 days beyond baseline finish they would use the following settings:



Green indicator is shown when the value is < or =

Yellow indicator is shown when the value is > Green and < or =

8. Click **OK** to apply the changes.
9. The health indicator for this project should now be displayed.
10. To complete the configuration, click **Exit Edit Mode**.



- Your workspace should now resemble the screen shot below. To add the Web Part to other Project Workspaces, repeat the preceding steps on those sites... or instead, add it to the workspace template so that all new sites already have it installed, configured and ready to use.

