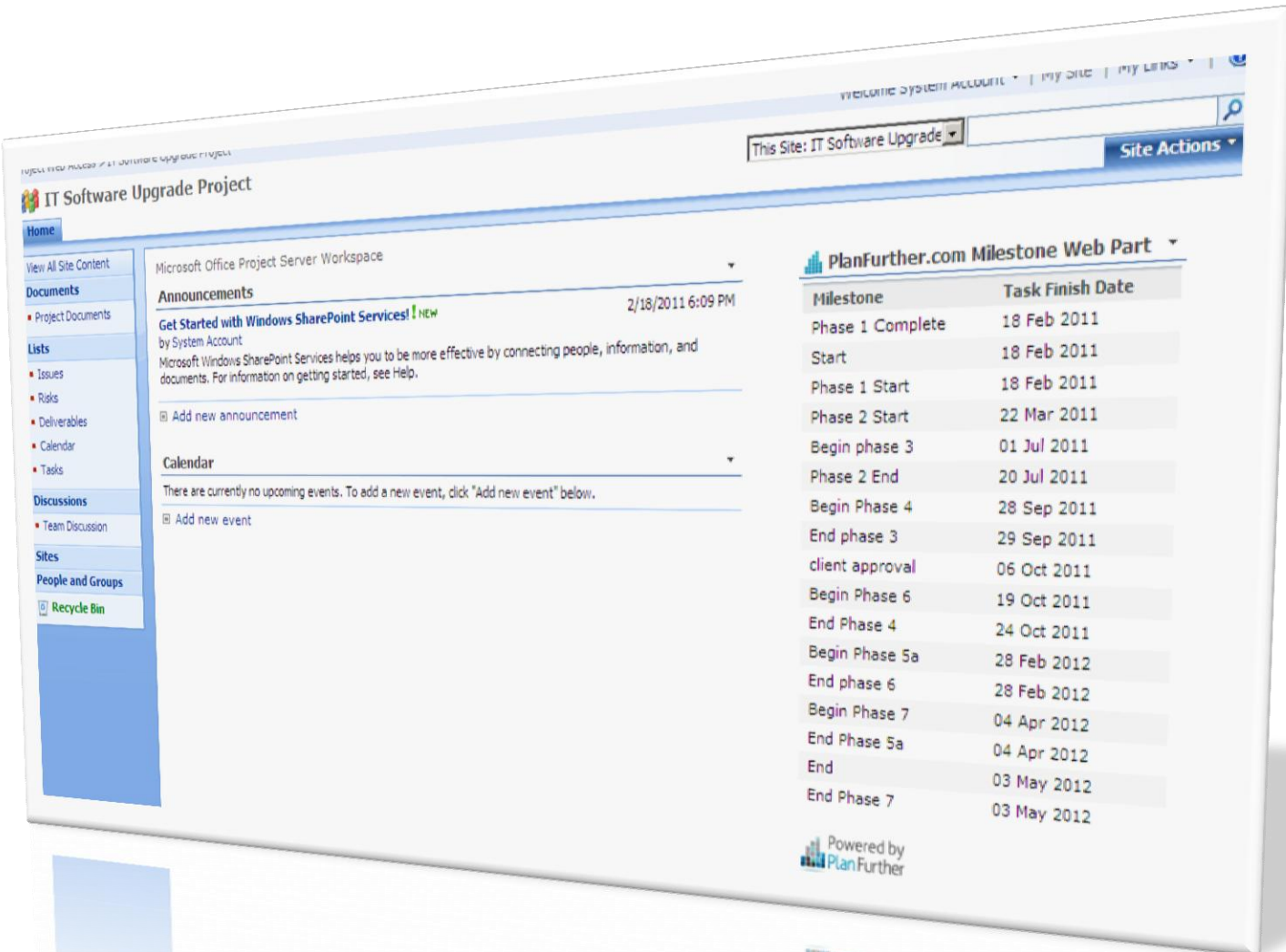


PlanFurther.com Workspace Milestone Web Part



Installation and configuration manual

www.planfurther.com

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About this Web Part

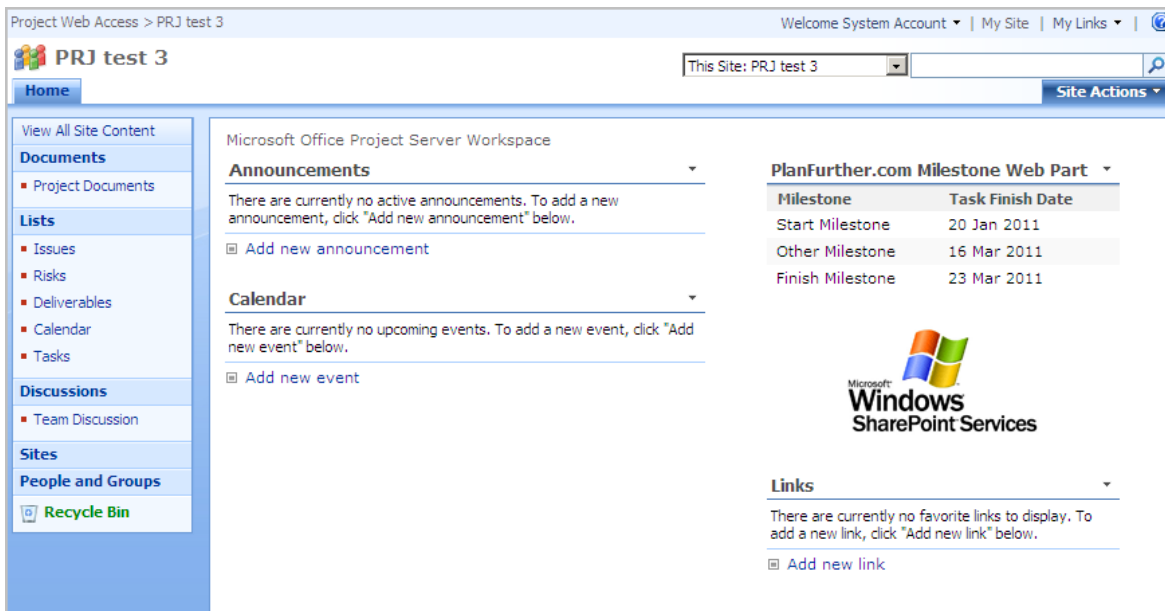
This Web Part is intended to be added to a Project Workspace on a Microsoft Project Server 2007 environment. This Web Part displays milestones related to the project to workspace visitors and is automatically updated upon project publishing.

The Web Part can also be configured to show all milestones, completed milestones only or incomplete milestones.

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:



The screenshot shows a SharePoint workspace titled "PRJ test 3". The left sidebar contains navigation options: Home, View All Site Content, Documents (Project Documents), Lists (Issues, Risks, Deliverables, Calendar, Tasks), Discussions (Team Discussion), Sites, and People and Groups (Recycle Bin). The main content area is titled "Microsoft Office Project Server Workspace" and includes sections for Announcements, Calendar, and Links. The "PlanFurther.com Milestone Web Part" is prominently displayed, showing a table of milestones:

Milestone	Task Finish Date
Start Milestone	20 Jan 2011
Other Milestone	16 Mar 2011
Finish Milestone	23 Mar 2011

Below the table is the Microsoft Windows SharePoint Services logo. The "Links" section at the bottom indicates no favorite links are currently displayed.

Prior to installing

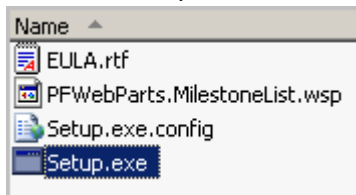
Before installing the Plan Further Milestone Web Part, ensure you have the following configuration, key information and rights:

- A Microsoft Project Server 2007 installation in good working order, ready to install the Web Part to. As with all software installations, just prior to installation you should perform a backup of the server and databases.
- Microsoft Project Server "Project workspaces" you wish to add the Web Part to.
- Microsoft Project plans (published to Project Server) which contain milestones 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. You can find out what your application pool account is by following this guide:
- Administrative access to log in to the server (RDP is fine) and run the Web Part installation on the Microsoft Project Server 2007 server.

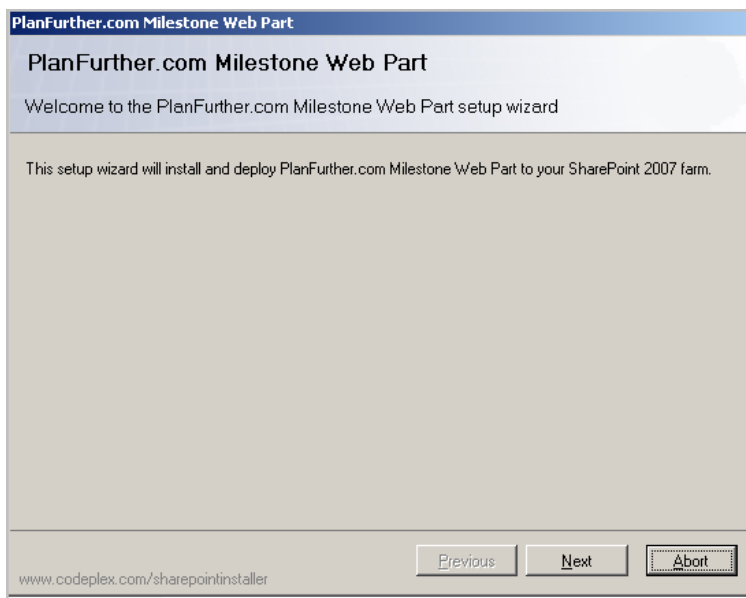
Installation steps

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.

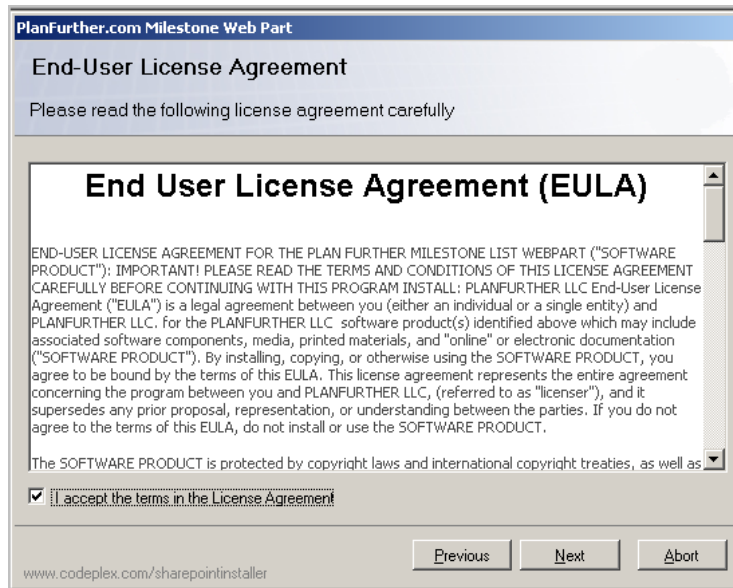
1. Unzip the contents of the download to a folder on the server.
2. Find the Setup.exe file and double click to begin the installation.



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



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



5. 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.

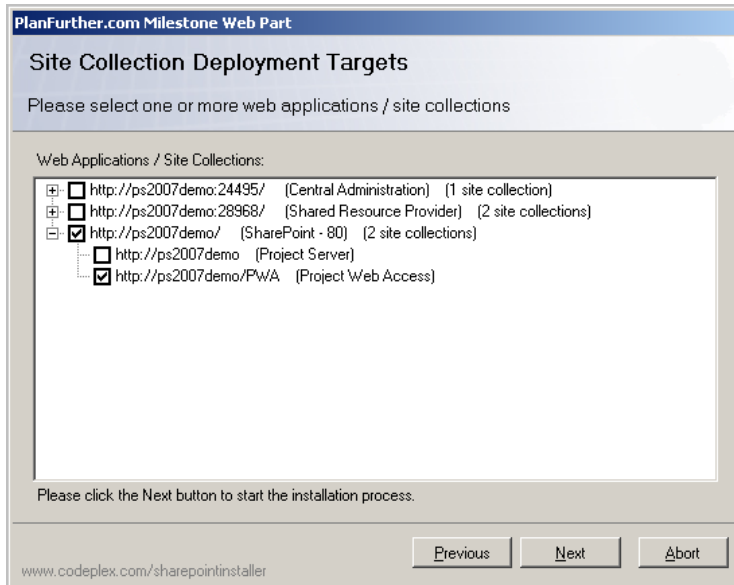
Web Applications / Site Collections:

<input type="checkbox"/>	http://ps2007demo:24495/	(Central Administration)	(1 site collection)
<input type="checkbox"/>	http://ps2007demo:28968/	(Shared Resource Provider)	(2 site collections)
<input checked="" type="checkbox"/>	http://ps2007demo/	(SharePoint - 80)	(2 site collections)

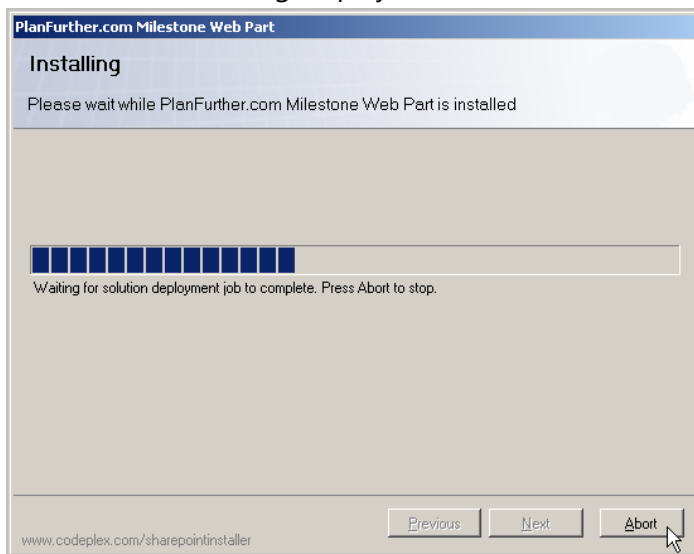
Please click the Next button to start the installation process.

www.codeplex.com/sharepointinstaller

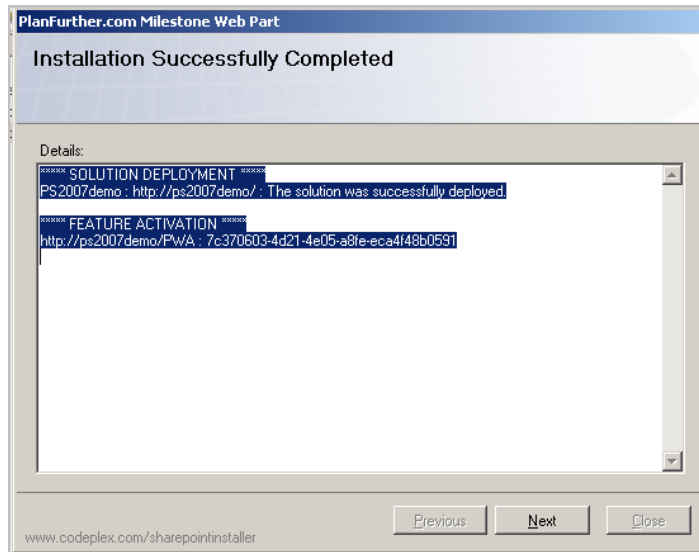
6. Click **Next** to continue.



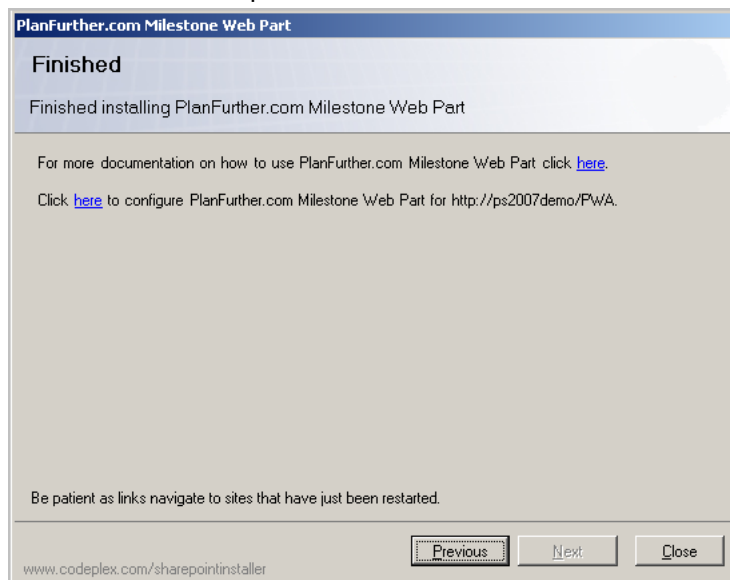
7. The installation dialog displays the status.



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



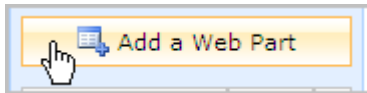
- Click **Close** to complete the installation.



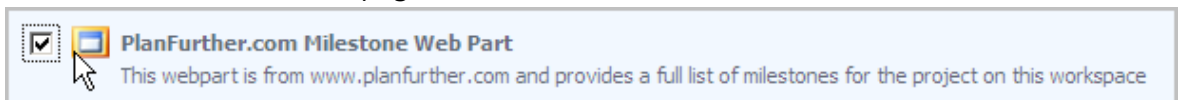
Configuration steps

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.

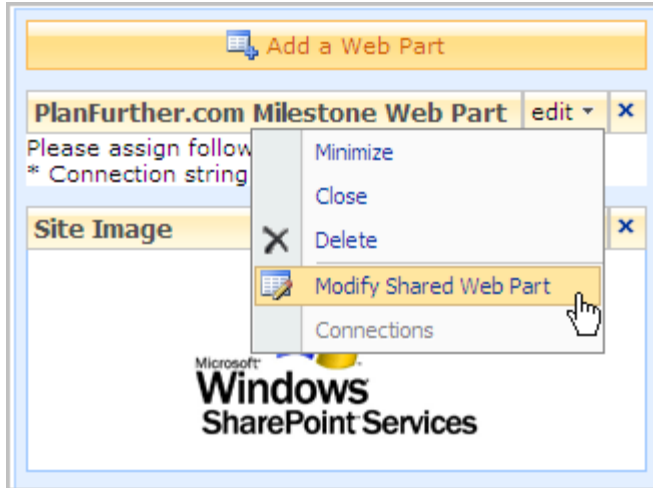
1. Using IE 7 or greater, open the Project Workspace that you wish to test the Web Part on.
2. Click **site actions | edit page** to begin adding the Web Part to the site.
3. Click a newly displayed "Add a Web Part" link.



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.

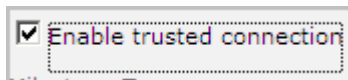


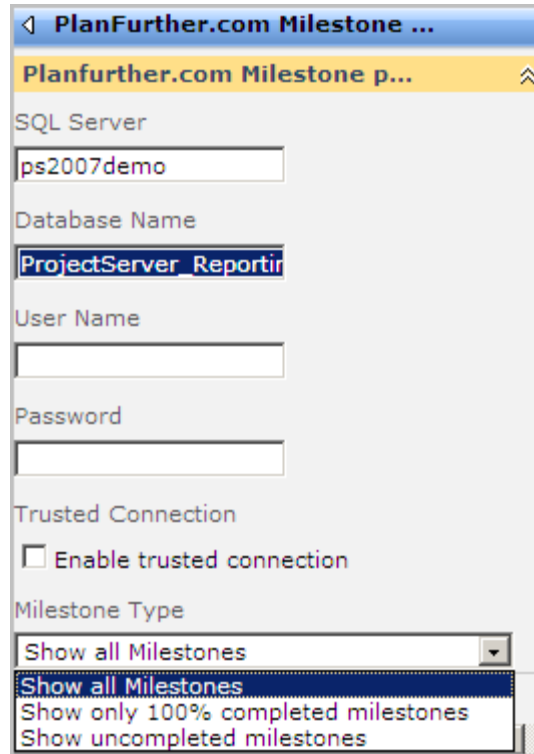
6. The Web Part properties window is displayed on the left hand side of the web page. Supply the server name and instance name (if any) into the SQL Server dialog box. Provide the Project Server reporting database name in the Database Name field.

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.





The screenshot shows a dialog box titled "PlanFurther.com Milestone ...". The dialog contains the following fields and options:

- SQL Server:** A text box containing "ps2007demo".
- Database Name:** A text box containing "ProjectServer_Reportin".
- User Name:** An empty text box.
- Password:** An empty text box.
- Trusted Connection:** A checkbox labeled "Enable trusted connection" which is currently unchecked.
- Milestone Type:** A dropdown menu with three options: "Show all Milestones" (selected), "Show only 100% completed milestones", and "Show uncompleted milestones".

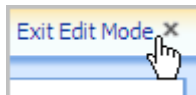
7. Finally, select the filtering option you desire under Milestone Type.
8. Click **OK** to apply the changes.

9. The milestones from this project should now be displayed.

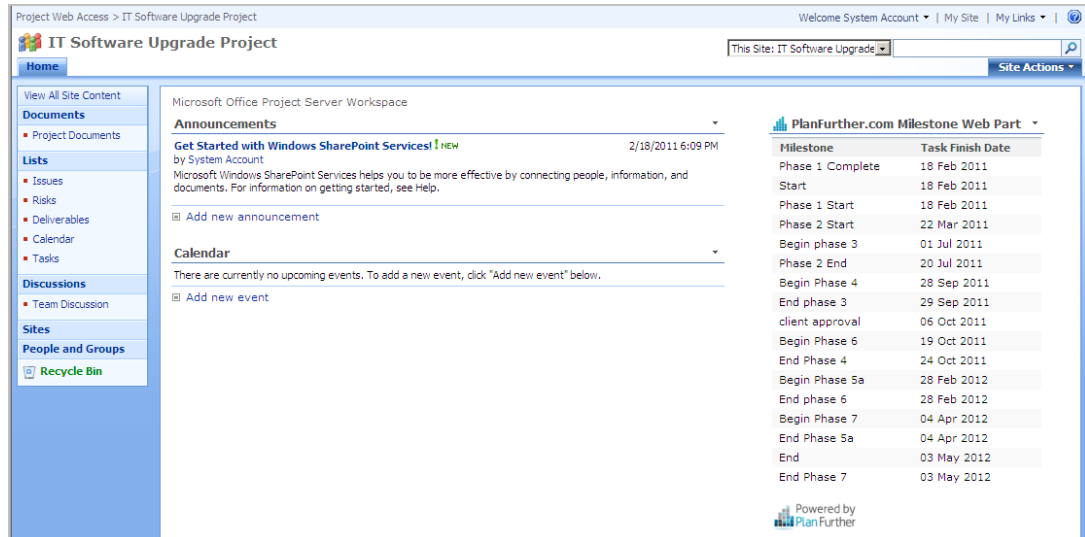
PlanFurther.com Milestone Web Part ▾	
Milestone	Task Finish Date
Phase 1 Complete	18 Feb 2011
Start	18 Feb 2011
Phase 1 Start	18 Feb 2011
Phase 2 Start	22 Mar 2011
Begin phase 3	01 Jul 2011
Phase 2 End	20 Jul 2011
Begin Phase 4	28 Sep 2011
End phase 3	29 Sep 2011
client approval	06 Oct 2011
Begin Phase 6	19 Oct 2011
End Phase 4	24 Oct 2011
Begin Phase 5a	28 Feb 2012
End phase 6	28 Feb 2012
Begin Phase 7	04 Apr 2012
End Phase 5a	04 Apr 2012
End	03 May 2012
End Phase 7	03 May 2012

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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.



Project Web Access > IT Software Upgrade Project

Welcome System Account | My Site | My Links |

IT Software Upgrade Project This Site: IT Software Upgrade Site Actions

View All Site Content

Documents

- Project Documents

Lists

- Issues
- Risks
- Deliverables
- Calendar
- Tasks

Discussions

- Team Discussion

Sites

People and Groups

- Recycle Bin

Microsoft Office Project Server Workspace

Announcements

Get Started with Windows SharePoint Services! New
by System Account 2/18/2011 6:09 PM

Microsoft Windows SharePoint Services helps you to be more effective by connecting people, information, and documents. For information on getting started, see Help.

Add new announcement

Calendar

There are currently no upcoming events. To add a new event, click "Add new event" below.

Add new event

PlanFurther.com Milestone Web Part

Milestone	Task Finish Date
Phase 1 Complete	18 Feb 2011
Start	18 Feb 2011
Phase 1 Start	18 Feb 2011
Phase 2 Start	22 Mar 2011
Begin phase 3	01 Jul 2011
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End Phase 7	03 May 2012

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