



PMP Specialists

Activities in Project Server 2007

Summary:

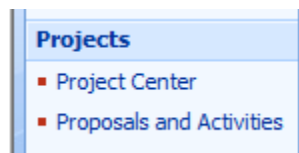
In Project Server 2007, users with the correct security permission can create Activities. Activities enable a user to establish an outline of work to be done that might not be in a schedule – for example, a list of items to complete after a project’s scheduled tasks are done. Or, an activity may be used as a to-do list for an individual for items that are not assigned as tasks on scheduled. Another possibility is to use Activities as a standard template of work activity that must be completed for the completion of a scheduled task (ie. Listing all the work components of a single task).

Activities are intended to be a place to provide a more detailed list of actions that must be done either before, after or as part of an assignment. They are meant to be used as a way to show the work that is not specifically assigned on a schedule. This is a great way to show work that is expected from a resource but that isn’t scheduled. As with projects, an activity gets a SharePoint site where issues, risks and documents can be linked to the activity.

How to create an Activity

Before you can create an activity, you must have permissions to do so. If you are unsure if you have the correct permission, the easiest way to check is to look at your PWA (Project Web Access) home page and see if “Proposals and Activities” is listed as an option and then try to create an activity.

The first step is to click on the link on the home page. The link is found in the Projects heading and should look like this:



After clicking on the link, a page will open that will look similar to this:



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Proposals and Activities

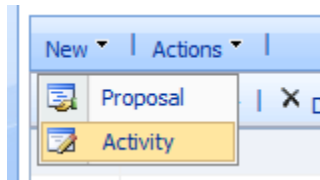
Use this page to create a project proposal or track activity, open an existing proposal or activity, or delete an obsolete proposal or activity.

New | Actions

Open Read-Only | Delete | Convert | Check-In | Build Team | Resource Plan

Name	Published	Checked Out By	State	Start Date	Finish Date	Resource Plan
2007 - Corporate PMO Standard Activities	Yes			1/2/2007	1/1/2008	
2007 - Non-plant Maintenance Activities	Yes			1/2/2007	1/4/2008	Published
2007 - Plant Maintenance	Yes			1/1/2007	1/7/2008	Published
Accounts Payable Verification Process Design Test	Yes		Proposed	1/1/2007	1/15/2007	Published
Accounts Receivable Verification	Yes		Proposed	11/15/2007	6/16/2008	Published
Acquisition Database Design	Yes		Proposed	4/1/2007	8/4/2007	Published
Asa Facility Equipment Upgrade	Yes		Proposed	10/1/2007	1/28/2008	Published
Automated Processing System Implementation	Yes		Proposed	12/1/2006	5/1/2007	Draft
Automated Software Design Architecture Upgrade	Yes		Proposed	10/9/2007	3/18/2008	Published
Bug Tracking Database Design	Yes		Proposed	4/18/2007	6/18/2007	Published
Compliance DB System Implementation	Yes		Proposed	6/1/2007	1/6/2008	Published

This is the list of current Proposals and Activities and some meta-data information about them is listed in the columns. On this page, click on the down arrow next to “New” and select Activity.



This will open a new window where you can give the activity a name, description, start date, plan owner (which defaults to your own userid), and any custom fields that are required for Projects. If you have a SharePoint list already created, then you can import that list. For this example, we assume that you do not have a SharePoint list. The New Activity screen looks like this:



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New Activity

Work Details Summary Information

Save Save and Publish Close

New or Import
To create a new proposal or activity, select New. To create a new proposal or activity from a SharePoint list, click Import.

Name and Description
Type the proposal or plan name as you want it to appear in Project Web Access views. Type descriptive text that will help users find this plan.

Plan Owner
Select the owner for this proposal or activity plan.

Project Custom Fields
Specify required project-level custom fields or outline codes that were created in the Customize Fields dialog box.

New
 Import from SharePoint list
Select SharePoint list

Name:

Description:

Start Date: 10/20/2008 End Date:

Plan Owner: farmadmin

Business Need:

Cost Health Trend: ...

After entering the required information, the activity that was just created will open in the details view. This allows you to enter high-level activities, durations and resources. Normally, the first step to do in this screen is to select the resources that you will use. These are the *generic* resources – job title or position, rather than a specific person – that you will need. For example, “Oracle DBA” and “Application Support Specialist” are generic resources that can be replaced later with actual resources. To select resources, click on “Build Team” and a screen like this will appear:



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Build Team: Sample Activity

Actions | Go To |

View Assignments | View Availability | Synchronize to Resource Plan |

<input type="checkbox"/>	Resource Name	Type	Generic	Cost Center	Timesheet Manager	Default As
	Work					
<input type="checkbox"/>	Ahs David	Work	No	1040 - COO	Andersen Erik	Ahs David
<input type="checkbox"/>	Allen Tony	Work	No	1040 - COO	Allen Tony	Allen Tony
<input type="checkbox"/>	Andersen Erik	Work	No	1040 - COO	Andersen Erik	Andersen Er
<input type="checkbox"/>	Application Support Specialist	Work	Yes			
<input type="checkbox"/>	Bagel Jean Philippe	Work	No	1060 - HR	Berry Jo	Bagel Jean F
<input type="checkbox"/>	Barker Rob	Work	No	1030 - CMO	Barker Rob	Barker Rob
<input type="checkbox"/>	Beebe Ann	Work	No	1030 - CMO	Culp Scott	Beebe Ann
<input type="checkbox"/>	Bento Paula	Work	No	1040 - COO	Allen Tony	Bento Paula

Buttons: Add >, < Remove, Replace >, < Match, Clear Match

To select a resource, click on the box next to their name. To see the amount of availability or other assignments that the resource(s) may have already been assigned you can click on “View Assignments” or “View Availability” after selecting one or more resources.

After selecting the resource(s) that you will want to use, the Add button will become enabled. Click on the Add button to be able to use the resource(s) that you have selected. After clicking on Add, the resource(s) that you selected will appear on the right side of the screen.

Buttons: Add >, < Remove, Replace >, < Match, Clear Match

<input type="checkbox"/>	Resource Name	Booking Type
<input type="checkbox"/>	Application Support Specialist	Proposed
<input type="checkbox"/>	Beebe Ann	Committed

Buttons: Save, Cancel

After clicking on the Save button, the detail screen will appear again. Enter any high-level activities, durations, Start Dates or milestone information as needed. You can also link tasks that are dependent upon each other. In the Resource Name column there is a drop down option that will list the resource(s) that you selected in the Build Team steps above. For this example, there are only two activities:



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Clicking on Save will save this proposal on the server but won't necessarily make this "visible" to others or to reporting. This is the option that you should choose though as you are working on the activity list so that you don't lose your work. Clicking on Save and Publish will post the activity to the list of Proposals and Activities on the server and make the information that you have entered "visible" to others and to reports. If editing is completed on the activity and Save and Publish has been selected, the way to leave this screen is to click on Close.

Note: After creating an activity, it must be "Checked-in". Instructions for checking in an activity are demonstrated later in this document so if there are no documents, issues or risks being added, please skip to that section.

Linking Documents, Adding Issues or Adding Risks

After the activity is published it is easy to add issues, risks or documents to it through the workspace. This can be accomplished in one of two ways. First, from the Home screen of PWA, in the list of Project Workspaces, the published activity will be listed.



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Project Workspaces

Actions ▾ Go To ▾
Project Name ▲
2007 - Corporate PMO Standard Activities
2132 Hoover Assembly Building Remodel
8023 - Local Area Network (LAN) upgrade
A Boat Show
Auto Satellite Radio Product Dev
Boat Show
Boat Show2
bobtest
CBT Implementation
Compressed Schedule for JSF-Rev D
Demo Proposal
Marine Satellite Radio Product Dev
Packaging Revision
Portable Satellite Radio Product Dev
Production Expansion Program
Sample Activity

Clicking on the name of the activity will result in a separate window opening to the default workspace screen. On the left hand side of the screen are the options for adding issues, risks or documents:



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Project Web Access > Sample Activity

Sample Activity

Home

- 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
Microsoft Windows SharePoint Services helps you to be more effective by connecting getting started, see Help.

Add new announcement

Calendar

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

Add new event

The second method is to open the activity from the Proposal and Activities page. This opens the details screen that has the task names, durations and resources in it. From that screen there is a way to link documents, issues and risks to a specific task by first selecting a task and then by clicking on the arrow next to the Actions text and selecting Link Document. Issues and Risks are in this section as well when the next screen opens.

Work Details Summary

Actions | Go To

- Outdent
- Indent
- Link Tasks
- Unlink Tasks
- Link Document**
- Build Team
- Resource Plan
- Delete Task
- Print
- Export to Excel



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In this example, the first task is selected and so the heading of the screen shows the name of the task (Sample Task One):

Link Risks, Issues and Documents - Sample Activity One

Use the following lists to link items to this task

Document Library	ID ▲	Title	Owner	Author
Document Library				
Project Issues				
Project Risks				

Clicking on Link Document as the example above shows will open the linking screen instead of the details screen. Just as in the first method of opening the workspace from the Home screen of PWA, the workspace can be opened from the details screen. By selecting the down arrow next to the Go To option, the Project Workspace can be opened in a new window.

Work Details Summary Information

Actions | Go To |

← | → | → Project Workspace

Proposals and Activities

Check-In the Activity

Whether issues, documents or risks are added or not, the activity is automatically checked-out to the person that creates it or has most recently been editing it. This is the way that the system ensures that two people aren't editing the same activity at the same time. To see if an activity is checked out, look at the Checked Out By column on the Proposals and Activities page. In this example, the user named "farmadmin" has the activity checked out:



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Proposals and Activities

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New ▾ Actions ▾		
Open Read-Only Delete Convert Check In Build Team Resource Plan		
Name ▲	Published	Checked Out By
Revision History Database Design	Yes	
Router Benchmark System Upgrade	Yes	
Sample Activity	Yes	farmadmin

To check in the activity, select it (don't open it into the details screen) and then click on the Check In option. Confirm that the activity has been checked in by looking again at the Checked Out By column and there should be no name in that column.