Activities in Project Server 2007

Summary:

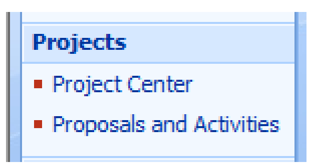
In Project Server 2007, users with the correct security permission can create Activities. Activities enable a user to establish an outline of work to be done that might not be in a schedule – for example, a list of items to complete after a project's scheduled tasks are done. Or, an activity may be used 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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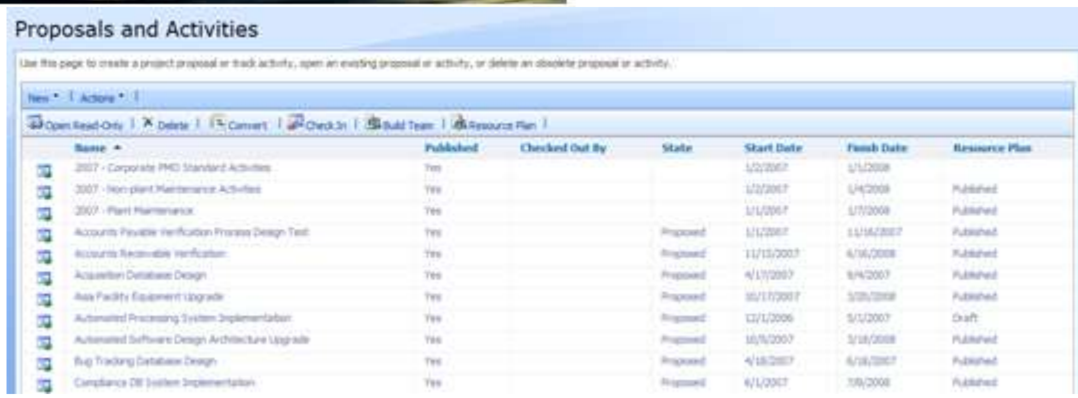
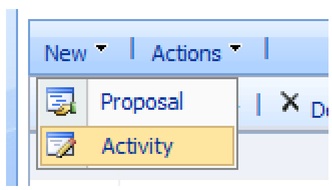


This is the list of current Proposals and Activities and some meta-data information about them is listed in the columns. On this page, click on the down arrow next to "New" and select Activity.



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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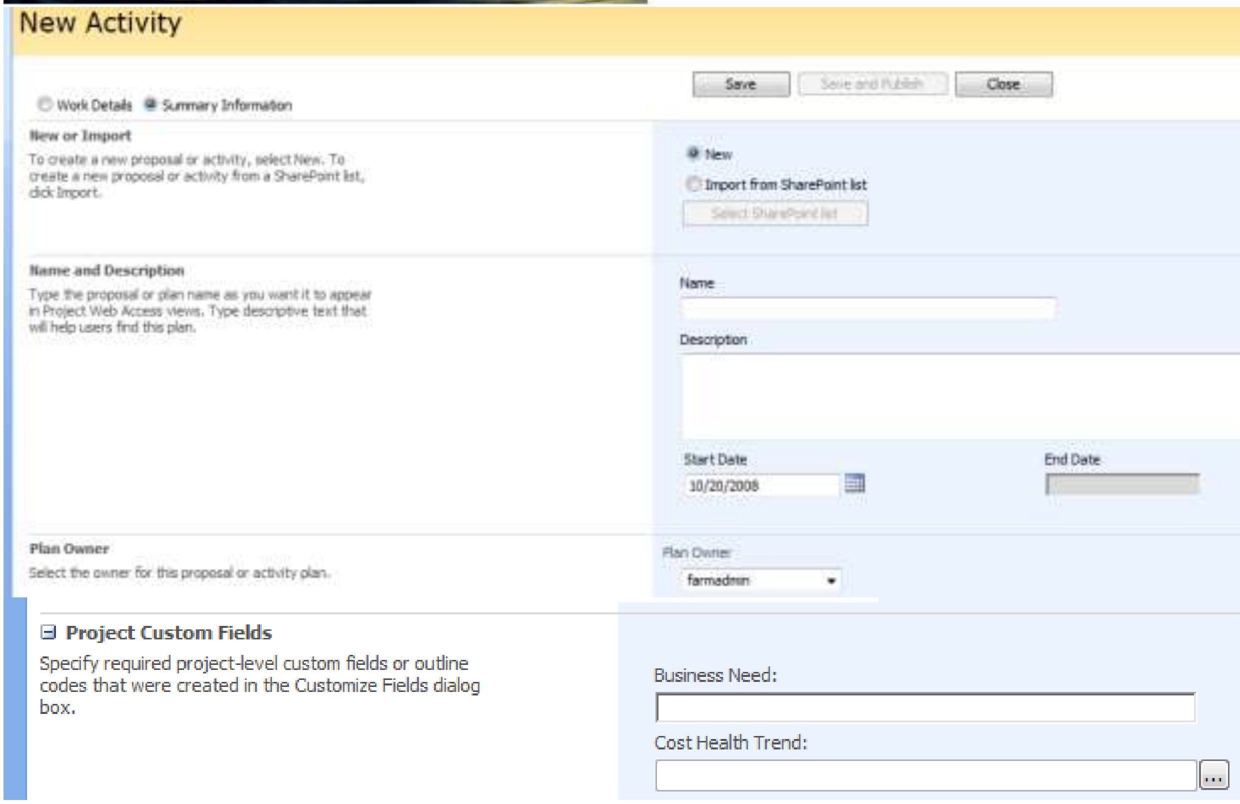

After entering the required information, the activity that was just created will open in the details view. This allows you to enter high-level activities, durations and resources. Normally, the first step to do in this screen is to select the resources that you will use. These are the *generic* resources – 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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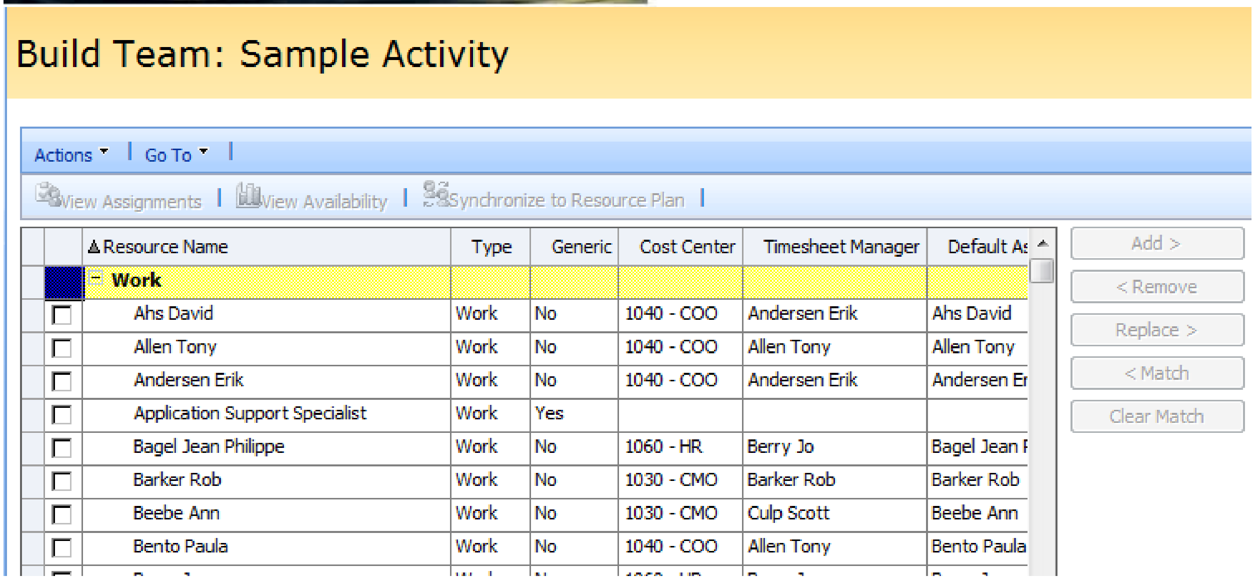
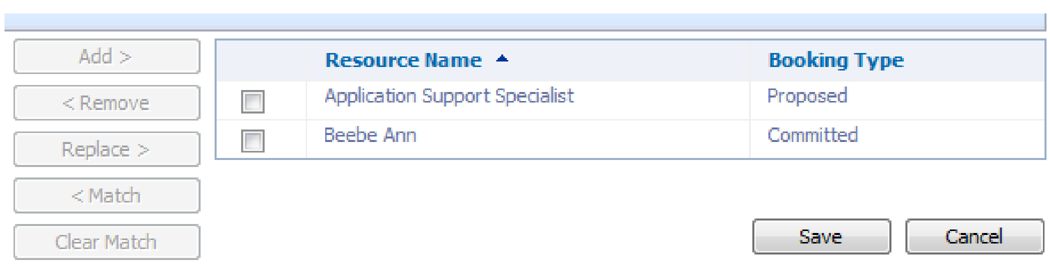


To select a resource, click on the box next to their name. To see the amount of availability or other assignments that the resource(s) may have already been assigned you can click on "View Assignments" or "View Availability" after selecting one or more resources.

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.



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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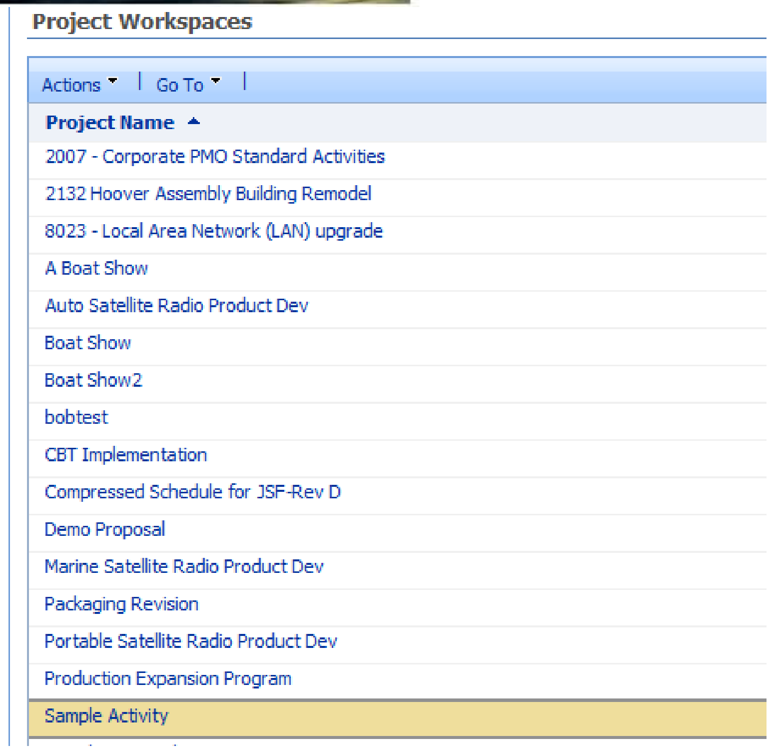

Clicking on the name of the activity will result in a separate window opening to the default workspace screen. On the left hand side of the screen are the options for adding issues, risks or documents:

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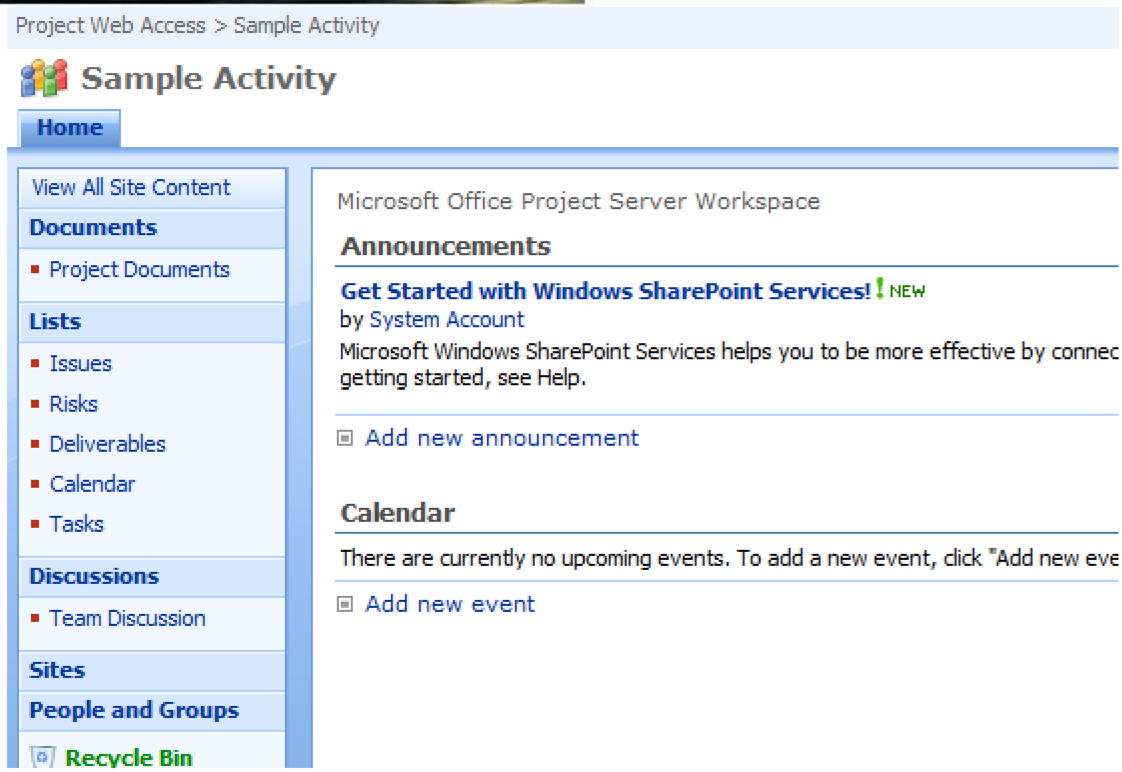
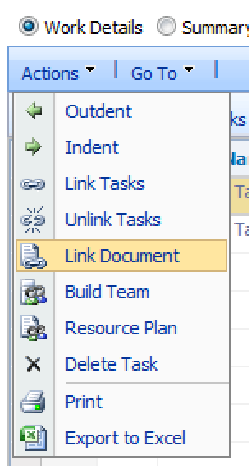


The second method is to open the activity from the Proposal and Activities page. This opens the details screen that has the task names, durations and resources in it. From that screen there is a way to link documents, issues and risks to a specific task by first selecting a task and then by clicking 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.



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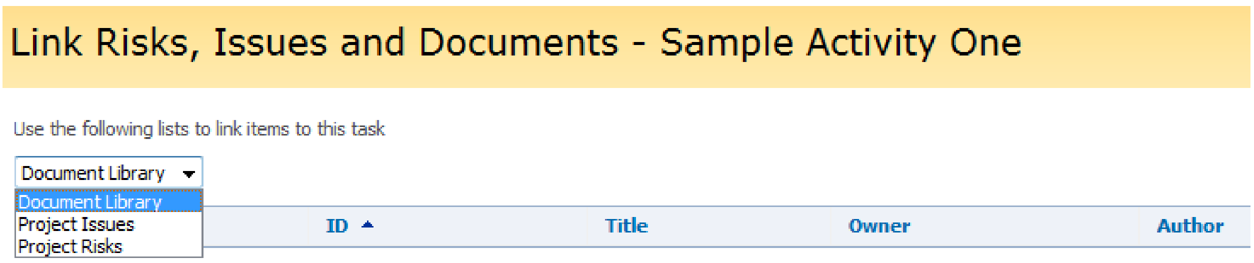
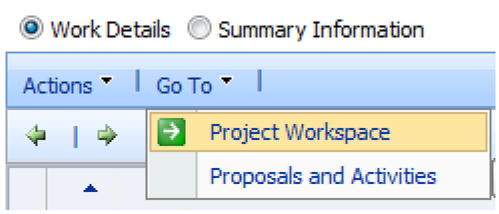
In this example, the first task is selected and so the heading of the screen shows the name of the task (Sample Task One):



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.



<u>Check-In the Activity</u>

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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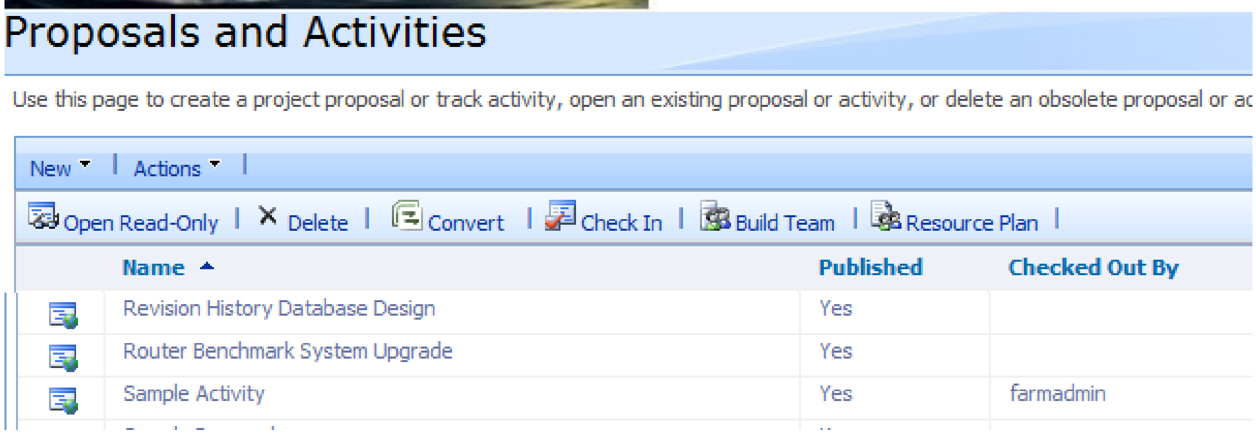

To check in the activity, select it (don't open it into the details screen) and then click on the Check In option. Confirm that the activity has been checked in by looking again at the Checked Out By column and there should be no name in that column.

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