



PMP Specialists

Using the Project Server Add-In for Outlook

This document explains how the Project Server add-in for Outlook works to import and update Assignments. It is assumed that you have already installed the add-in and that it is working properly.

For purposes of this document, a sample schedule has been created, saved and published to the Server. That is shown here:

Task Name	Duration	% Complete	Work	Start	Finish	Predecessors	Resource Names
☐ Collin Outlook Testing	12 days	0%	64 hrs	Wed 8/5/09	Thu 8/20/09		
Outlook Task One	2 days	0%	16 hrs	Wed 8/5/09	Thu 8/6/09		Collin Quiring
Outlook Task Two	2 days	0%	16 hrs	Tue 8/11/09	Wed 8/12/09	1	Collin Quiring
Outlook Task Three	2 days	0%	16 hrs	Thu 8/13/09	Tue 8/18/09	2	Collin Quiring
Outlook Task Four	2 days	0%	16 hrs	Wed 8/19/09	Thu 8/20/09	3	Collin Quiring

Be sure to note that a Resource Name has been assigned for the tasks. The item that we will be updating is the “Duration” field (which will affect the “Work” field). Note that Task One has 2 days duration and 16 hours work.

In Outlook, select the “Import New Assignments”.



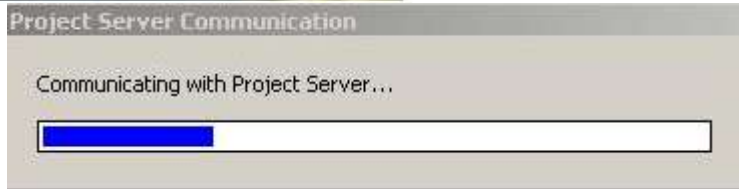
The password box will appear. Enter the password that you are using in Project Professional.



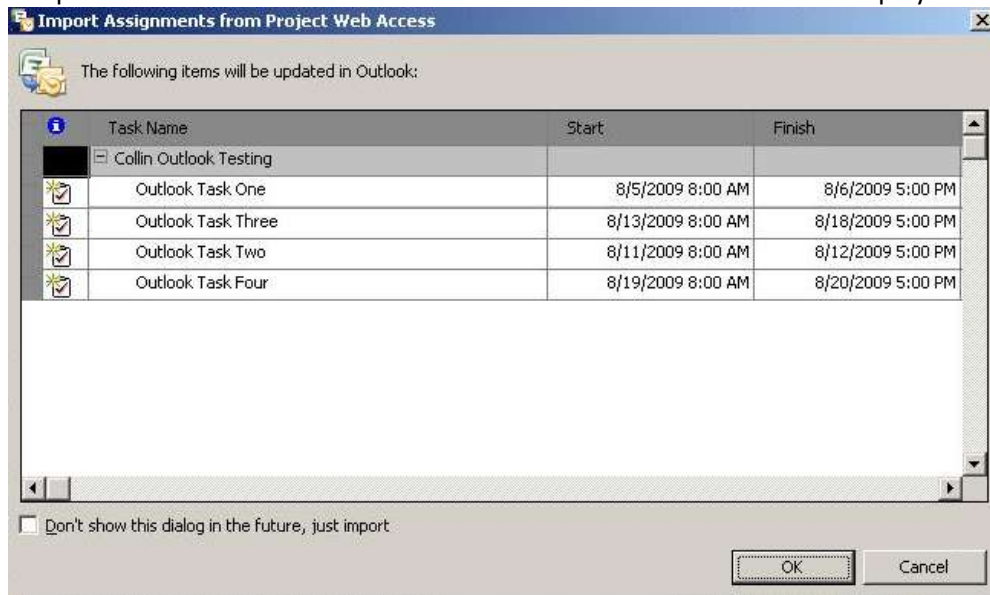
If all is going well, the next box that appears will be the communication box:



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If you selected “Show Confirmation dialog” when you installed the add-in, you will see the tasks that are about to be imported. The name of the schedule and the individual tasks will be displayed.



After selecting OK, the Assignments will be imported to your Tasks or Calendar:



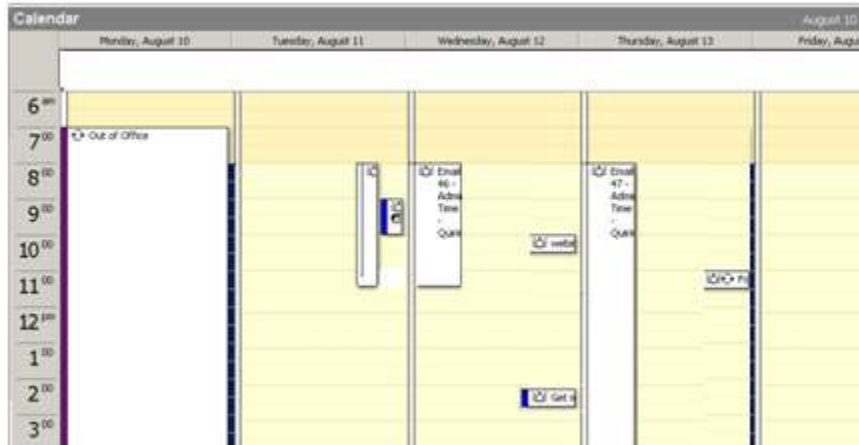
In this example, the tasks are dropped into the Tasks view:



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Tasks	
<input checked="" type="checkbox"/> Subject	Due Date
Click here to add a new Task	
<input type="checkbox"/> Outlook Task Four - Collin Outlook Testing	Thu 8/20/2009
<input type="checkbox"/> Outlook Task One - Collin Outlook Testing	Thu 8/6/2009
<input type="checkbox"/> Outlook Task Three - Collin Outlook Testing	Tue 8/18/2009
<input type="checkbox"/> Outlook Task Two - Collin Outlook Testing	Wed 8/12/2009

This is how it might appear in a Calendar view:



Note: In the Calendar view, the calendar item box will appear with the same information but with another tab – the common Outlook Calendar Appointment view. This lists the task and the project and the amount of time as the Assignment. The first tab will appear like the example below and the second tab, “Project Web Access” is identical to the view when opened from the Outlook Tasks screen.





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When you open the Assignment in the task view it will appear like this:

The screenshot shows the Microsoft Office Project Web Access interface. The title bar reads "Outlook Task One - Collin Outlook Testing - Project Web Access Task". The menu bar includes File, Edit, View, Insert, Format, Tools, Actions, and Help. The toolbar contains buttons for Save and Close, Recurrence..., Assign Task, and other navigation icons.

The main content area displays the following information:

- Subject:** Outlook Task One - Collin Outlook Testing
- Task name:** Outlook Task One
- Project name:** Collin Outlook Testing
- Task hierarchy:** Collin Outlook Testing > Outlook Task One
- Start:** Wednesday, August 05, 2009 8:00 AM
- Finish:** Thursday, August 06, 2009 5:00 PM
- Task health:** (Dropdown menu)
- Percent of work complete:** 0%
- Remaining work:** 2 d
- Total work:** 2 d

Below this information is a timesheet grid with columns for days of the week (Sun 8/2 to Sat 8/8) and rows for different types of work:

	Sun 8/2	Mon 8/3	Tues 8/4	Wed 8/5	Thu 8/6	Fri 8/7	Sat 8/8
Planned work:	0h	0h	0h	0h	0h	0h	0h
Actual billable work:	0h	0h	0h	0h	0h	0h	0h
Actual non-billable work:	0h	0h	0h	0h	0h	0h	0h
Overtime billable work:	0h	0h	0h	0h	0h	0h	0h
Overtime non-billable work:	0h	0h	0h	0h	0h	0h	0h

Buttons include "< Previous", "Next >", "< Copy from Planned", "Save to Project Web Access", and "And submit to project manager" (checked). A note states: "To submit your timesheet after saving, click Go To Web Timesheet".

At the bottom, there are buttons for "Options...", "Go to Project Workspace", "Go To Web Timesheet", "Go to My Work", and "Help". A "Reminder" section shows a checked box for "Thu 8/6/2009 8:00 AM". A "Contacts" field is empty, and a "Categories" field contains "Collin Outlook Testing".

It is not normally necessary for the user to do so, but clicking on the "Go To..." buttons will open that item in PWA. In this example, "Go to My Work" will open PWA and you will need to enter the password and userid that you are using in Project Professional.



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Sign In

User name:

Password:

 Sign me in automatically

Note: The Sign me in automatically checkbox may or may not work consistently based upon IE cache settings and other internal settings to the server and client machines.

After signing in, you will be at the “My Tasks” page.

My Tasks

Task Name	Start	Finish	Progress
Timesheets 98 NEW	10/27/2009	10/27/2009	0d of 0.01d (0%)
Timesheets 99 NEW	10/28/2009	10/28/2009	0d of 0.01d (0%)
Collin Outlook Testing			
Outlook Task Four NEW	8/19/2009	8/20/2009	0d of 2d (0%)
Outlook Task One NEW	8/5/2009	8/6/2009	0d of 2d (0%)
Outlook Task Three NEW	8/13/2009	8/15/2009	0d of 2d (0%)
Outlook Task Two NEW	8/11/2009	8/12/2009	0d of 2d (0%)

This can be used to view more details about the task that aren't shown in Outlook.

In Outlook, in the task's information screen, you can enter the work information, attach files or add notes. To add a file or other item from Outlook, select “Insert” from the top menu.



After adding files or other items and updating the task in Outlook, you will notice that a message appears stating you haven't saved the changes yet.



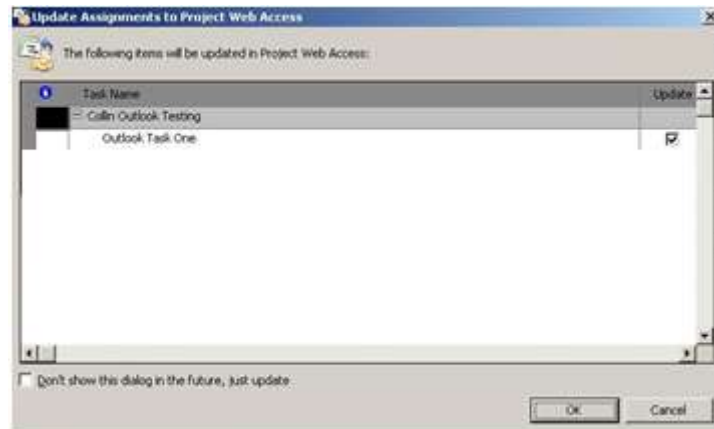
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It is recommended to click on “Save and Close” and not on the button “Save to Project Web Access.” The “Save and Close” option allows you to modify many tasks and update the server in batch while the other option will be for this task only.

In the example that we are using, for Outlook Task One I have modified the “Remaining Work” to be “0h”. (Our current settings only allow for this field to be changed but that is fine for this example.) After clicking on “Save and Close” and modifying any other tasks, I select the “Update Project Web Access” button in the Project Server Outlook toolbar. This brings up the sign in box again where I enter the password being used in Project Professional.

The next pop up box that appears (if you selected “Show confirmation dialog before updating” in the setup) is the confirmation box.



After selecting OK, Project will be updated. As the user, you do not have to open PWA and there is nothing else required. After updating this task, you can see that it shows as completed in the Tasks view in Outlook.



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Tasks		Due Date
<input checked="" type="checkbox"/>	Subject	
<input type="checkbox"/>	Click here to add a new Task	
<input type="checkbox"/>	Outlook Task Four - Collin Outlook Testing	Thu 8/20/2009
<input checked="" type="checkbox"/>	Outlook Task One - Collin Outlook Testing	Thu 8/5/2009
<input type="checkbox"/>	Outlook Task Three - Collin Outlook Testing	Tue 8/18/2009
<input type="checkbox"/>	Outlook Task Two - Collin Outlook Testing	Wed 8/12/2009

For the Project Manager to complete the process and to update the schedule the following steps must take place. The Project Manager can accept (or reject) the task update and update the schedule accordingly. This is done in PWA in the "Task Update" screen. When a user updates their information, an email can be sent to the Project Manager directly from the system (as set in Personal Settings emails). When the Project Manager goes to the Task Update page, they see the list of tasks, sorted by Project, and what was modified, that is ready for them to approve or reject. In this example, there is only one task waiting for an update.

Task Updates										
Actions Go To										
Select All Preview Accept Reject Search Refresh										
	Name	Assigned To	Type	Sent	% Complete	Work	Act Work	Rem Work	Start	Finish
<input checked="" type="checkbox"/>	Collin Outlook Testing		Task update	NA		0h	0h	0h	8/5/2009	8/5/2009
<input type="checkbox"/>	Outlook Task One	Collin Quiring	Task update	3/5/2009	0%	0h	0h	0h	8/5/2009	8/5/2009

After selecting and updating the task, the Project Manager has completed their work and the schedule is updated. The next time that the schedule is opened the task will display with the new update. In this case, note that Outlook Task One shows the modification that we made – changing the duration and work fields to zero from the original 2 days duration and 16 hours work.



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		Task Name	Duration	% Complete	Work	Start	Finish	Pr
0	<input type="checkbox"/>	Collin Outlook Testi	10 days	0%	48 hrs	Wed 8/5/09	Tue 8/18/09	
1		Outlook Task One	0 days	0%	0 hrs	Wed 8/5/09	Wed 8/5/09	
2		Outlook Task Two	2 days	0%	16 hrs	Wed 8/5/09	Thu 8/6/09	1
3		Outlook Task Three	2 days	0%	16 hrs	Tue 8/11/09	Wed 8/12/09	2
4		Outlook Task Four	2 days	0%	16 hrs	Thu 8/13/09	Tue 8/18/09	3