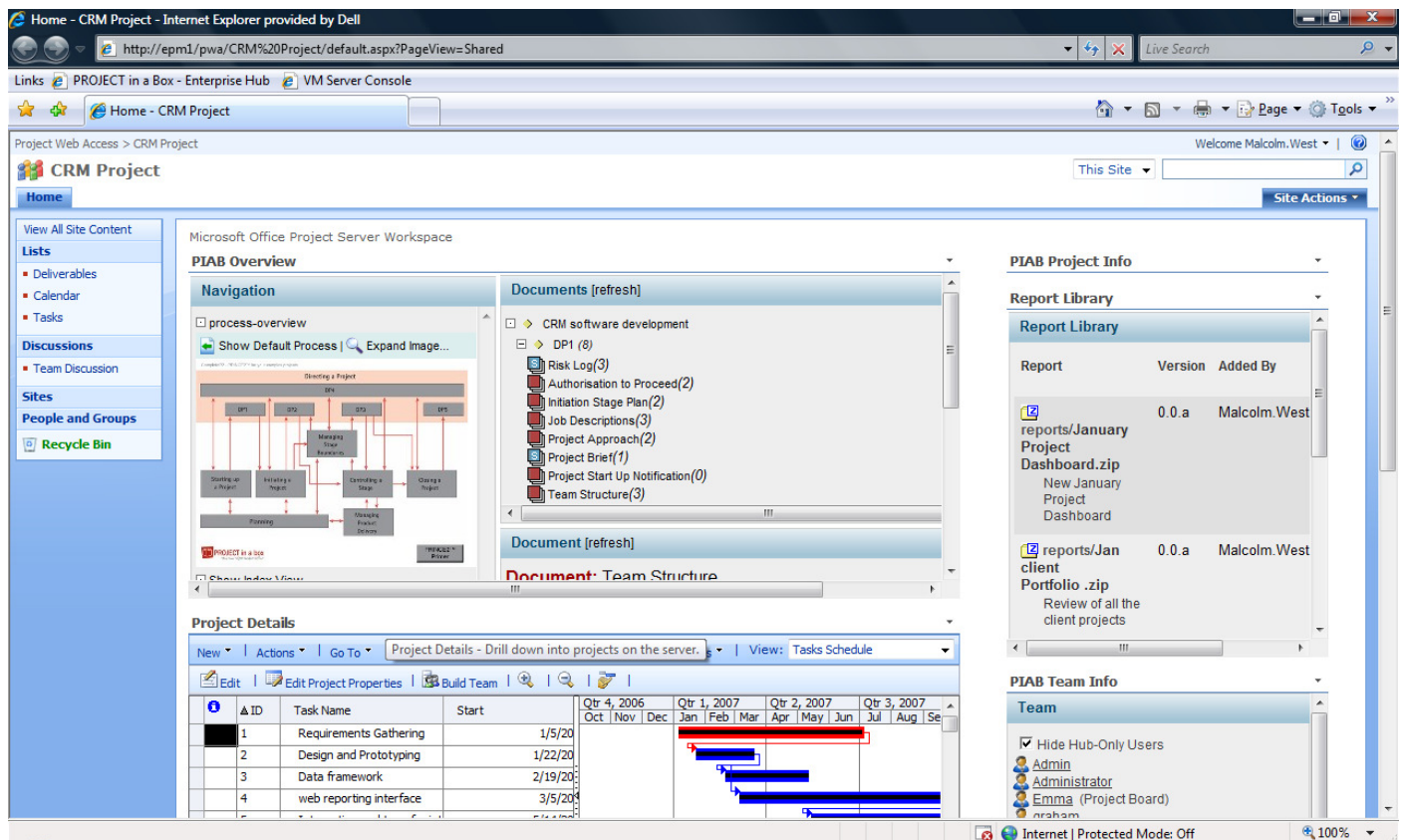


# **PROJECT in a box** *"Your own Project Support Office"*



## White Paper:

## A Practical Guide to setting up PROJECT in a box and Microsoft EPM

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# A Practical Guide to setting up PROJECT in a box and Microsoft EPM

## Introduction

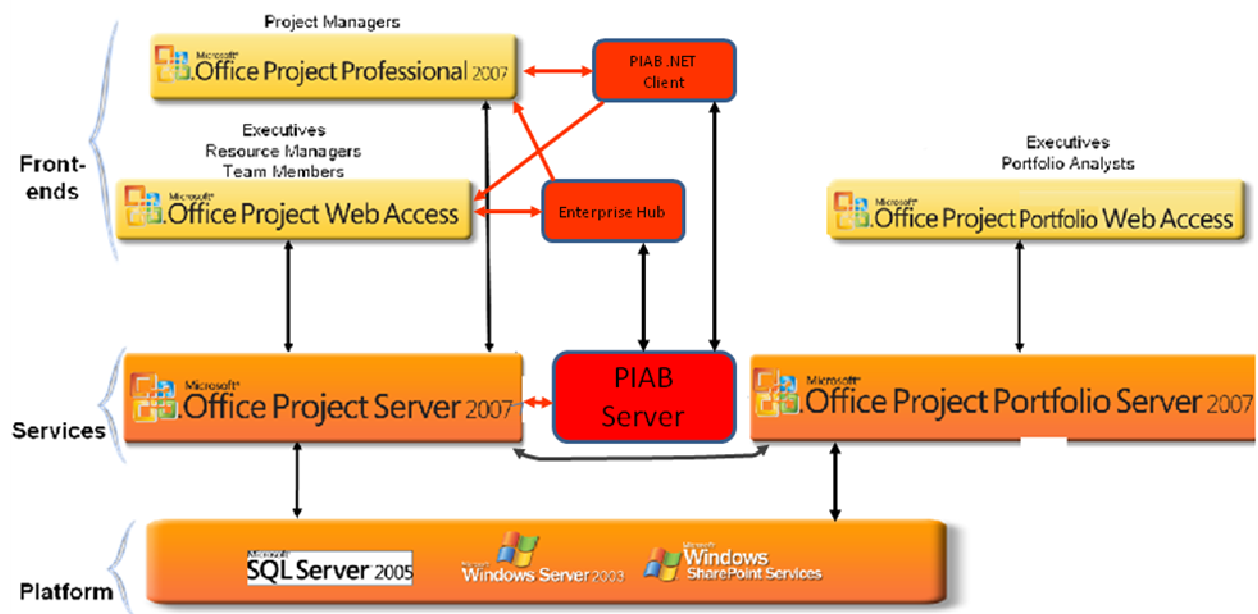
PROJECT in a box provides the best in methodology led project management and reporting with a focus on easy to use interfaces for the project and portfolio teams. Microsoft EPM is the market leading solution in resource pool and planning management at a corporate level.

Both platforms utilise the same technology base and server-client-web interface model and so lend themselves to integration.

This paper will take you through the practical steps undertaken at the following levels:

- Linking the servers
- Linking at a project level
- Branding consistency

The diagram below will help you understand the different elements and how these interact.



## Prerequisites

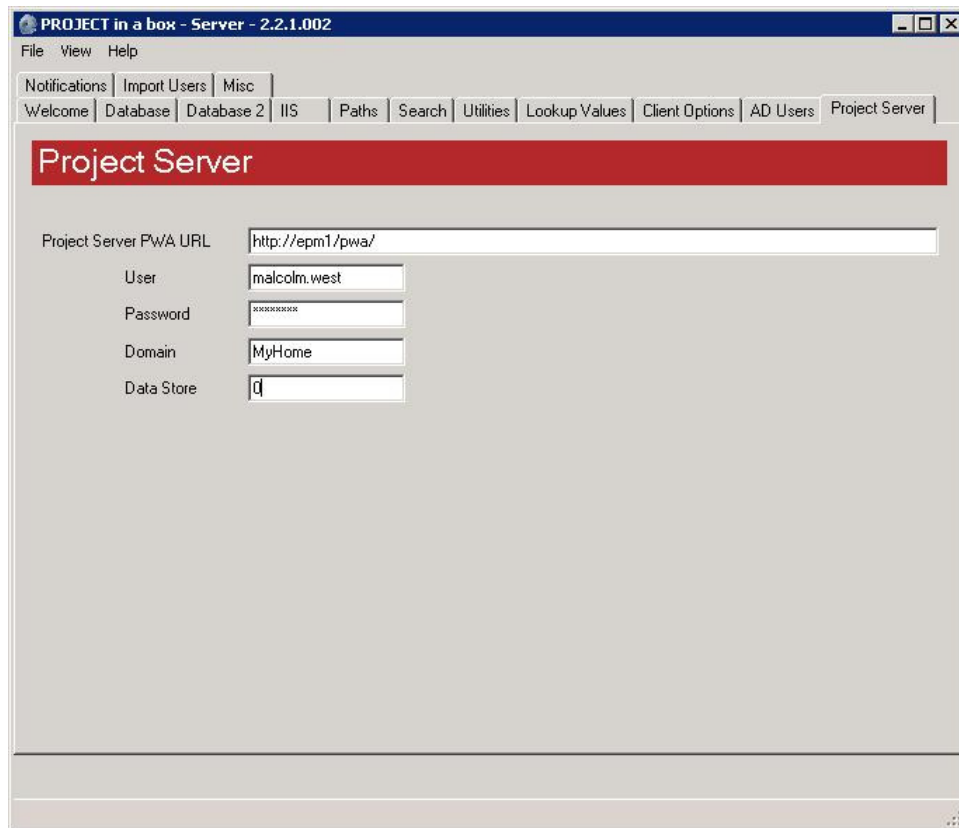
This paper assumes that the following are already complete:

- Microsoft EPM (Project Server 2007 and Project Web Access 2007) are already installed on the server.
- The PC has a local copy of Project Professional 2007 installed on the client PC and this has been synced with Project Server.
- PIAB server and Enterprise Hub has been installed on the server.
- PIAB .NET client has been installed on the client PC.
- Both systems are on the same Windows Domain.
- The same set of users has been created in Active Directory, Project Server and PIAB.
- PIAB is set to use Integrated Windows Authentication.
- You as a user have full Admin rights in both PWA and PIAB.

## ***Linking the Servers***

PROJECT in a box is able to draw data on project plans and resources directly from Project server to use in its reporting engine. To do this it requires an account to access the Project Server database and extract the required data.

The connection information is input and stored in the PROJECT in a box server console on the PIAB Server (if the PIAB server is installed in split configuration this can be found with the Application part). The settings are completed broadly as below (further advice is provided in the technical help with the server console).



The screenshot shows the 'PROJECT in a box - Server - 2.2.1.002' application window. The 'Project Server' tab is selected in the top navigation bar. The main content area is titled 'Project Server' and contains the following configuration fields:

- Project Server PWA URL:**
- User:**
- Password:**
- Domain:**
- Data Store:**

The Project Server does not directly draw data from the PIAB server as rather its return links to the PROJECT in a box information are presentational and can be better seen as based in Project Web Access (PWA).

## ***Linking at a project level***

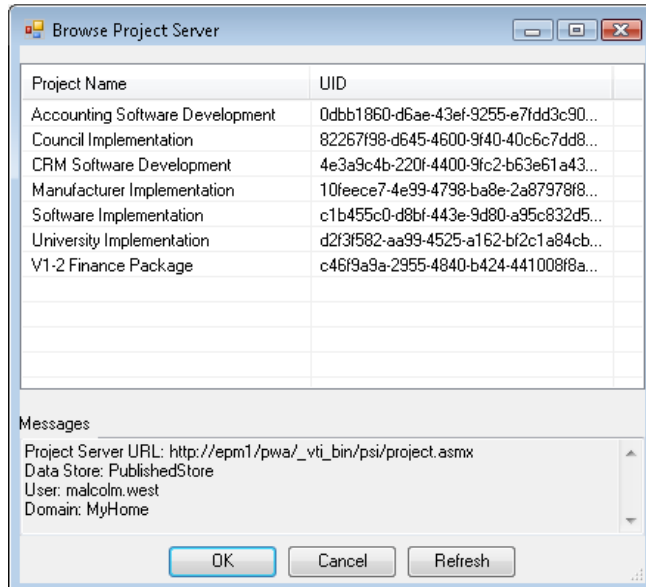
These links can be set up at a number of levels depending on the type and level of interaction required, the following approaches are available:

1. Associate a specific project (plan) in Project Server with a project in PIAB as a data source for reporting
2. Enable a PWA Workspace or other presentation/interface view to be launched directly from PIAB (either .NET Client or Enterprise Hub)
3. Host within a Workspace or other page of PWA part of the Enterprise Hub or PIAB .NET client deployment system for access to live PIAB methodology and documentation

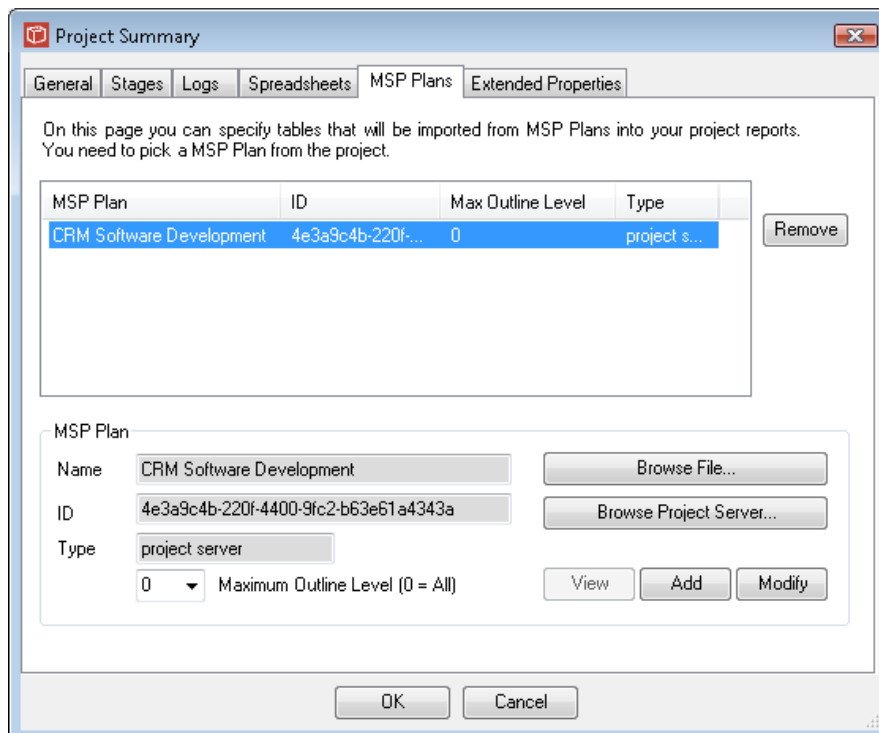
When AD authenticated users are using combinations of items 2 and 3 they can move seamlessly between the two systems to access plan, resource data and the EPM tool set or methodology, documents and reporting from PIAB.

## Associate a Project Server project with a PIAB Project as a data source for reporting

Having selected your project in the PIAB .Net client open the Project Summary information form and in the MSP Plans tab select Browse Project Server to add the appropriate project from the list presented (direct from Project Server), see form below:



Once the project is selected as below select the outline level and use add and OK to save as a source (as shown below). Please note sources can be defined from Project Server, local .mpp project files and even excel if required.



With this set up whenever a report is run to include plans for this project data on tasks, dates, % completes and allocated resources will be drawn direct from live data in Project Server and mixed with other data held in PIAB to give you a great picture of project status.

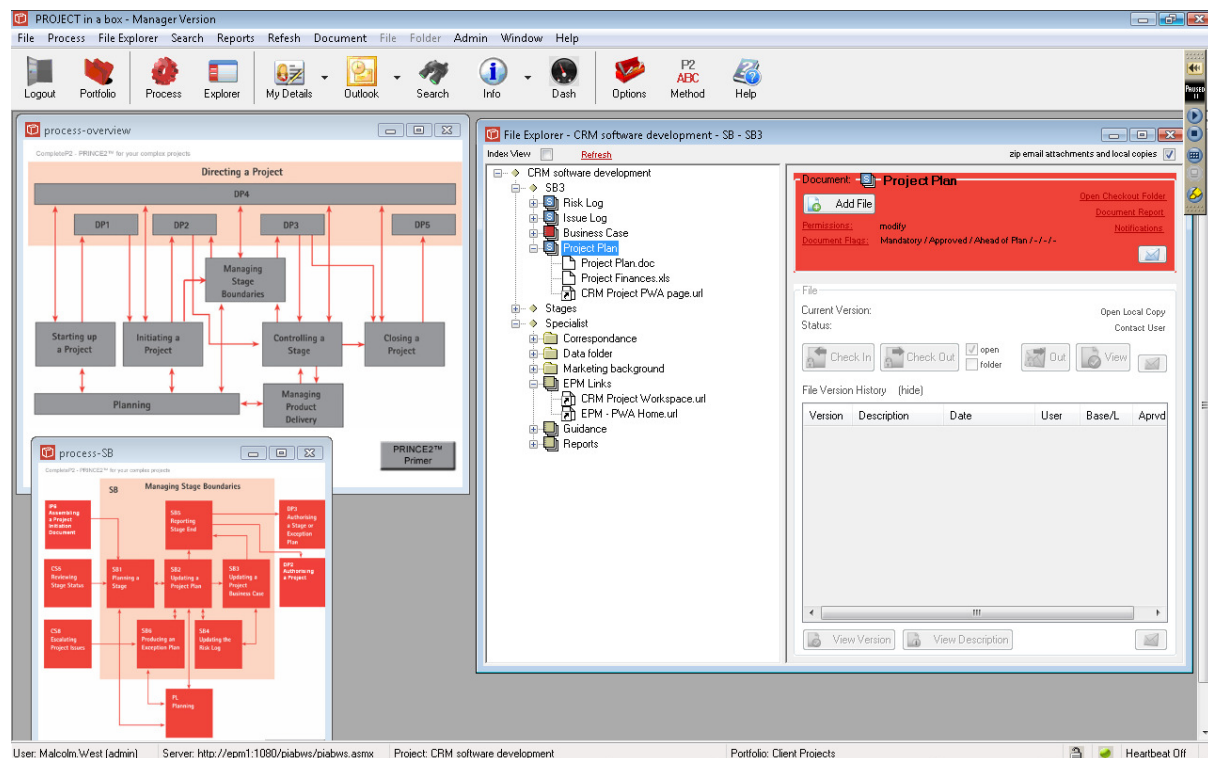
## Enable a PWA Workspace or other presentation/interface view to be launched directly from PIAB

PROJECT in a box allows you to manage your project files within a methodology structure. A series of documents are displayed against each process in the project and also in the specialist documents area uniformly on all processes. Each document either displays versioned files which are held on the PIAB server or links which can be used to launch other applications or specified web pages.

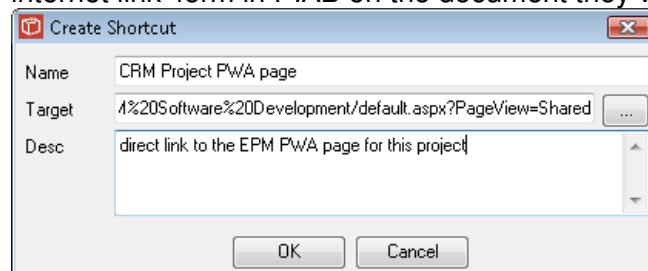
It is the links which are of interest here and can be set to launch any of the following:

- The PWA home page
- The PWA project centre
- The PWA resource centre
- A particular PWA Workspace
- A particular discussion thread or other quick launch view.

We can see here below how this looks once set up with key links included against the project plan (to launch the workspace with plan views and resourcing information) and in the Specialist Products area to launch the PWA home page.



Creating a new link is straightforward for a user with read/write access to the project. They simply copy the address/URL from the view they want in PWA and place it into the 'add new internet link' form in PIAB on the document they want (as shown below).



We would recommend that on each project the following is included:

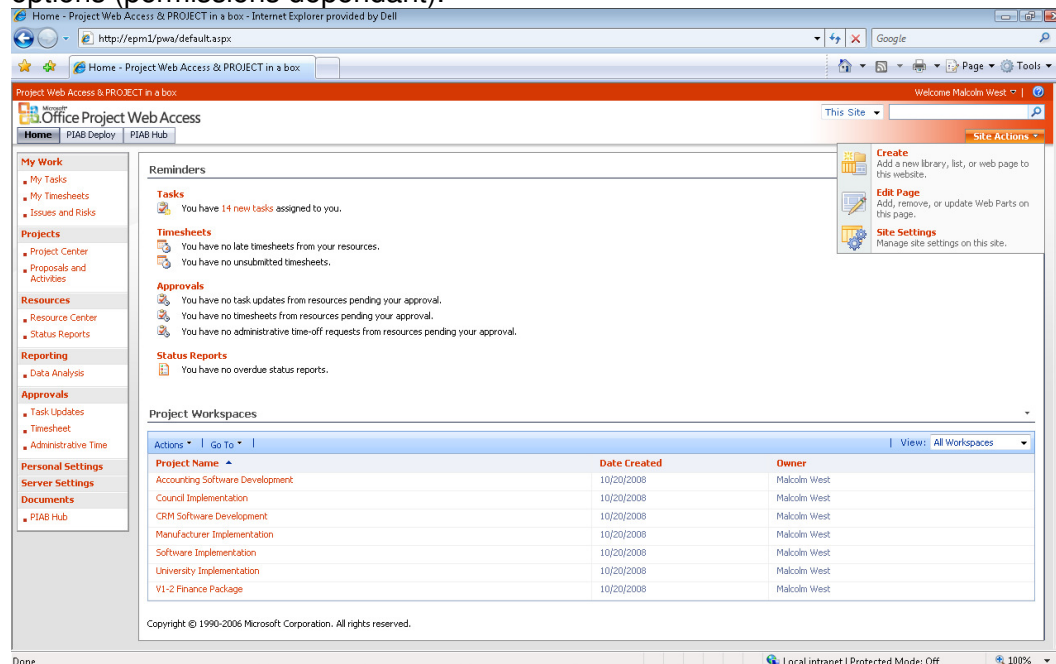
1. A new Document in Specialist products with all the useful links set up including to the particular project workspace, the PWA home and resource centre. These links will then be available to users from every process.
2. Key links are then set up within the Project plan document to 'replace' the traditional included .mpp plan or excel plan used projects when Project Server is not available.
3. Ad-hoc links can then be added to discussions threads and other helpful views in PWA as tactically required by users through the delivery of the project.

## Host within a Workspace or other page of PWA part of the Enterprise Hub or PIAB .NET client deployment system for access to live PIAB methodology and documentation

Project Web Access (PWA) is a SharePoint based customisable set of pages to display your project and programme plan and resource information you can also use it to launch plans into Project Professional, the desktop client, to edit and adjust. The PWA lends itself to being adjusted to include different resources and elements from other location and systems using a range of styling and content configurations including web parts.

Here we will look to add some navigation aids back into PROJECT in a box information and content to the main Project Web Access pages by adjusting menus and insert live content feeds into the Workspace pages for each project so that PIAB and PWS information can be accessed from the same interface.

The menu and navigation changes are standard PWA configuration using the Site actions options (permissions dependant).



On the PWA home we have made the following structural changes:

- Included Main menu items to launch PIAB deploy and PIAB Hub (Site settings – top link bar)
- Adjusted the Quick Launch list (left column) to show documents as coming from PIAB Hub (Site Settings – Quick Launch)
- Reminders remove references to Risks and Issues as these are being managed in PIAB (Edit Page, then edit reminders web part to not show risk and issue reminders)

The more significant changes are made on the Workspace for a particular project. Here as we can see below webparts can be used to host individual pages/tabs from Enterprise Hub interface within the Project Workspace. As shown in the images below:



The top screenshot displays the 'PIAB Overview' page. It features a left sidebar with navigation links like 'Home', 'View All Site Content', 'Lists', 'Discussions', 'Sites', and 'People and Groups'. The main content area is divided into several panes: 'process-IP' showing a project flow diagram, 'CRM software development' showing a project hierarchy, 'Document [refresh]' showing a list of documents, and 'Project Details' showing a table of project tasks. The right sidebar contains 'PIAB Project Info' with project status and description, and 'Report Library' showing a list of reports.

The bottom screenshot displays the 'Create Reports' page. It features a left sidebar with navigation links. The main content area is divided into several panes: 'Dashboard Report' and 'Project Report' showing report creation options, 'Gantt Chart' showing a project timeline, and 'PIAB Team Info' showing a list of team members. The right sidebar contains 'Dashboard' and 'PIAB Team Info'.

These individual panes can be used with settings to populate them without the menu or header making them perfect for this multi column small pane environment. Elsewhere when larger spaces are available a tabbed arrangement allowing for quick movement between functionality may be preferred.

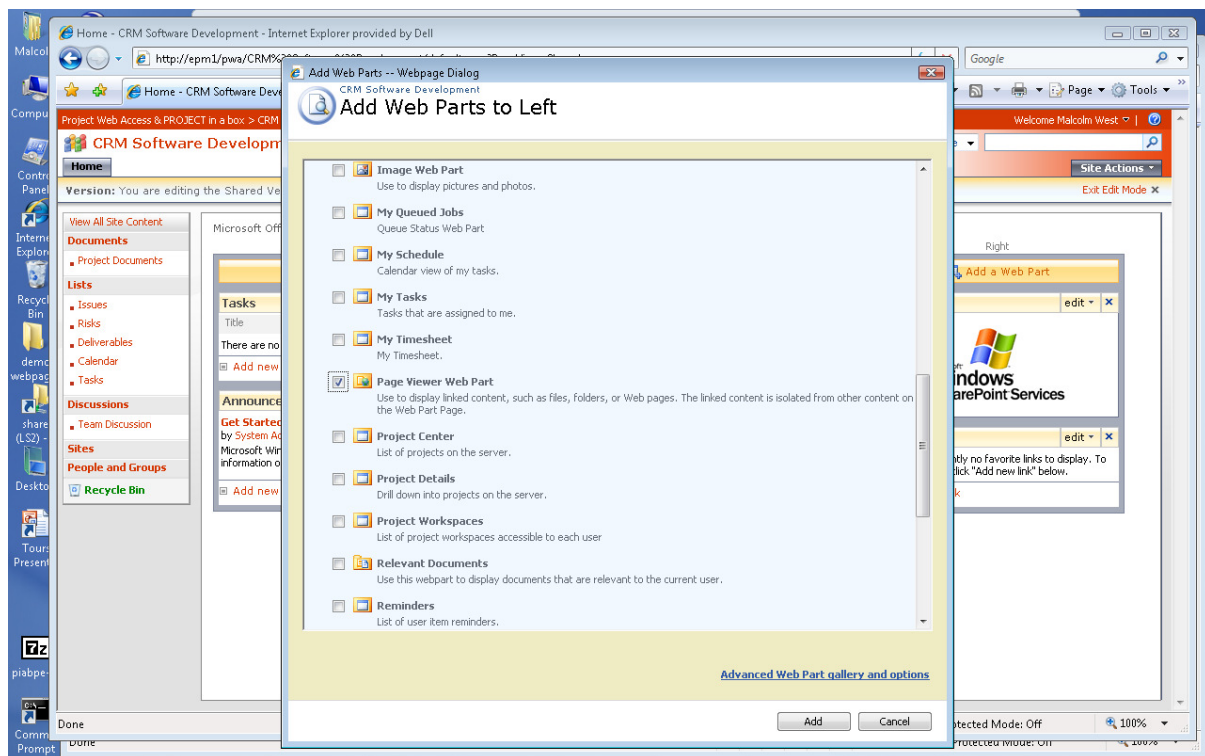
Again with the appropriate permissions in PWA these changes are easy to make. Site Settings – Edit page provides the web part view of the Workspace as shown below and you can then add a new web part. The page format shown above uses:

- Left top Page viewer web part linking to the Enterprise Hub explorer page (copy the address/URL from the page in the hub). This Web part is fixed to 300px high to obtain a reasonable viewing area. The format to remove header and menu is as

follows:

[http://\[servername\]/piabws/Explorer.aspx?projectid=21729&hideheader=true&hidemenu=true](http://[servername]/piabws/Explorer.aspx?projectid=21729&hideheader=true&hidemenu=true)

- Left Mid Project Details web part which shows the traditional project Gantt view.
- Left Lower is the EH Create Report pane again with fixed width and settings as above
- Other left web parts are removed.
- Right top Page Viewer web part linking to the EH Project Info pane. Fixed to 210px height.
- Right Mid Pane linked to Report Library (shown rolled up in the first screen and expanded in the second).
- Right lower pane linked to the EH team list. This is a variant of the page specifically for integration, when the user link is clicked the results pop up in a separate window instead of in the same form.
- The Lower web parts are the standard EPM Discussions and Announcements.
- Other right web parts are removed.



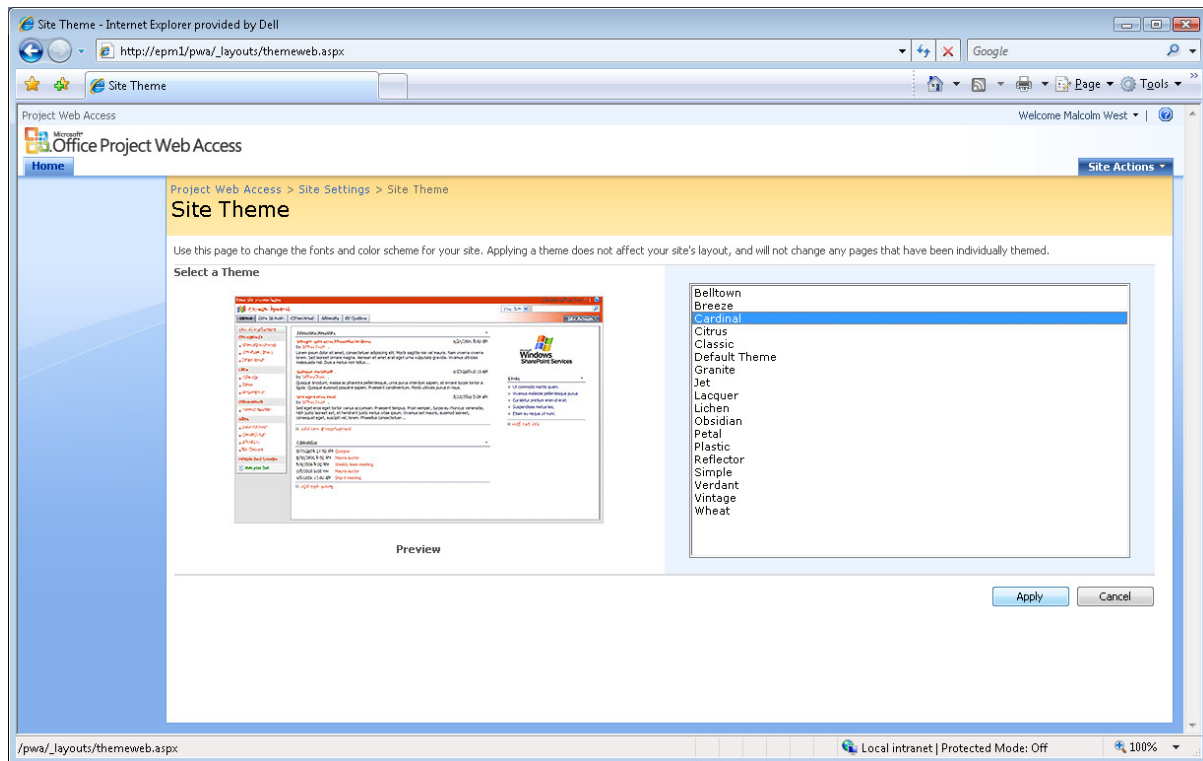
Finally on the Workspace the Site Settings Quick Launch list is again edited to remove links to documents, risks and issues as these are now available from the PIAB parts of the page.

## Branding Consistency

To help with the consistent feel of the two applications branding is essential and in both the PIAB Enterprise Hub and PWA you can make global changes to help with the alignment. Here we have used the Cardinal (red) style on both the PWA home and the Workspaces. This is accessed via Site Settings – Site Theme as shown further below. The screens above use an Enterprise Hub branding (.css and images) which are consistent with the EPM environment e.g. blue gel headings, the PIAB support team can provide these for you if you wish.

Other changes here are the title bar which has been renamed to show the mix of PIAB and PWS and the logos can also be modified to give a dual brand all within the Site Settings area.





## Closing Remarks

PROJECT in a box and EPM are both great at what they do but together they can provide even more to the organisations as a unified methodology led capability for delivering consistent controlled projects.

Both platforms provide tools and building blocks to support integration and with surprisingly little work a substantial join can be established between them using a consistent pattern of links and format changes as described here. All this is held together and becomes seamless for the user because of the Active Directory Authentication supported by both systems allowing freedom of movement between the systems.

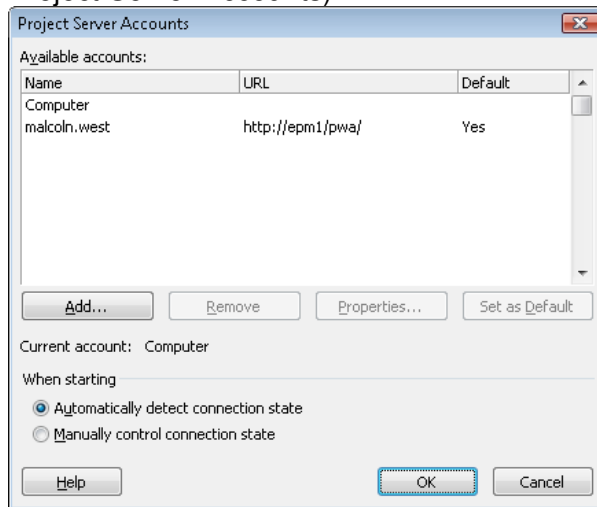
There are no additional licensing impacts in EPM or PIAB of making these links assuming users already have PIAB and Project/PWA user licences so there is nothing stopping you from getting started today.

## Further Information

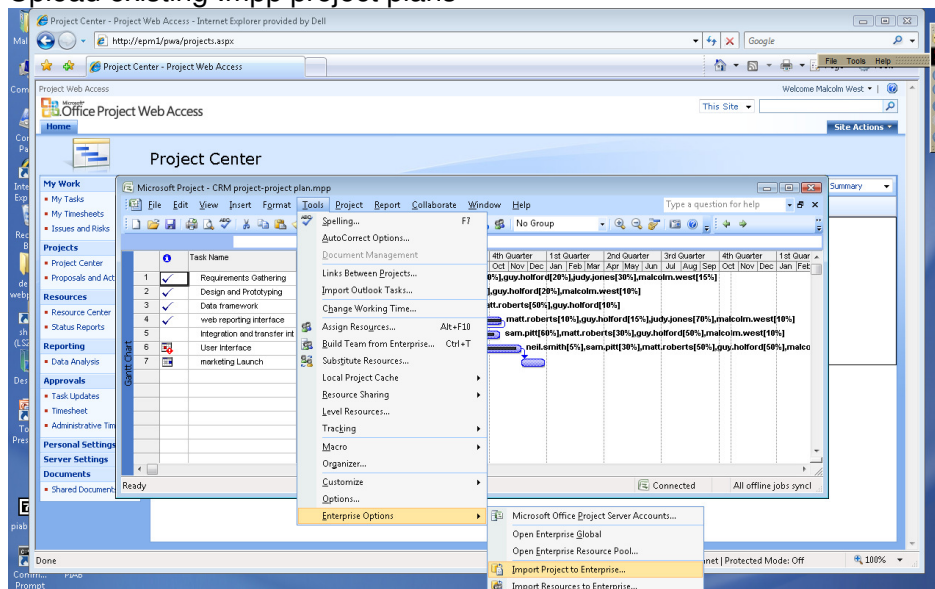
Keep an eye out on the Tours page of [www.projectinabox.org.uk](http://www.projectinabox.org.uk) as a video tour of this integrated EPM and PIAB solution will soon be available to view.

## Appendix - Further notes on setting up a demo site

Setting up EPM serve link in Project 2007 (tools> Enterprise Options>Microsoft Office Project Server Accounts)



### Upload existing .mpp project plans



You may need to sync resources here, best bet is to upload plan without resources, then create a resource pool for the project, check the project out and assign resources to tasks then check back in (save).

Once synced in then open again in Project 2007 as a project from the EPM and publish it:

