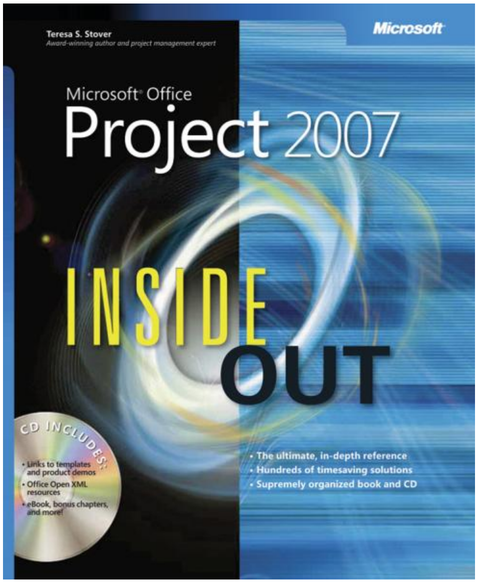

Microsoft® Office Project 2007 Inside Out

Teresa S. Stover

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CHAPTER 23

Participating on a Team Using Project Web Access

A project plan might make an impressive report or boardroom presentation. But without resources to implement the tasks, that lovely project plan is nothing more than fiction. As a project team member, you know that it falls to you to help achieve the goals of the task. You also know that you must regularly inform the powers that be of your progress so that they know how the project is doing overall.

This is where you and Microsoft Office Project Web Access come on the scene. You use Office Project Web Access, the Web-based application for project team members that is a companion to Microsoft Office Project Professional 2007 (used by project managers). You use Project Web Access to maintain a detailed list of the tasks under your responsibility, to know when they're due, and to understand how they fit into the larger project picture. You also use Project Web Access to track your progress on assignments and submit that information to your project manager. If needed, you can use Project Web Access to log the amount of time you're spending for other tasks—project-related or not, billable or not.

Project Web Access doesn't limit you to just one project, either; rather, you can use it for as many projects as you're contributing to. And if you're working for two or three project managers at a time on these multiple projects, you can use Project Web Access to keep all this information straight and keep all project managers well-informed.

With project management more automated like this, you can spend more time working on your tasks and less time worrying about keeping management up to date. To this end, this chapter is designed for the project team members, team leads, and resource managers, all of whom use Project Web Access to carry out their project-related responsibilities.

To start using the Microsoft Project enterprise and team collaboration features, you use your Web browser to connect to your organization's installation of Microsoft Office Project Server 2007. You can then log on to Project Web Access.

If you're curious about the structure and flow of information among Project Web Access, Office Project Professional, and Office Project Server 2007, see Chapter 20, "Understanding Enterprise Project Management."

After your project manager publishes a project to the project server, you can see and work with the list of tasks to which you're assigned in Project Web Access. You can add more tasks and assign yourself to other tasks as needed. Project Web Access becomes the central location for all your project tracking activity.

With your assignments in place, your way is set to start working on those assignments, according to the established start and finish dates. While you work, you can record how far along you are on each assignment or even how much time you're spending on each assignment. You can make notes about any potential problems, significant accomplishments, issues, or potential problems. Then you have progress tracking information in place when your project managers ask for a progress update or status report.

The microcosm of your own tasks draws your focus most of the time. But sometimes it helps you to see the tasks that others on the project team are working on at the same time. You can use Project Web Access to review the full project schedule, which shows who's doing what when.

Through Project Web Access, you have access to collections of project-related documents, issues, and risks as well.

In addition to everything else you do, you might have resource management responsibilities. This might be something as simple as reassigning a few tasks to peers on your project team. Or, you might be the team lead or supervisor over a larger group of project team members. You might be a resource manager responsible for building teams and managing all resources on one, two, or many projects in your organization. Resource management features in Project Web Access make sure you have the tools you need.

Project server administrators and portfolio managers should see Chapter 21, "Administering Your Enterprise Project Management Solution." Project managers can refer to Chapter 22, "Managing Enterprise Projects and Resources." Managing stakeholders can find pertinent information in Chapter 24, "Making Executive Decisions Using Project Web Access." Chapter 24, along with this chapter, are provided as standalone e-chapters on the Bonus Content tab of the Companion CD.

Getting Started with Project Web Access

The first step, of course, is to start. You use your Web browser to connect to your organization's installation of Project Server. You then log on to the server from Project Web Access using the user identification established for you by the project server administrator.

After you're logged on, browse around to orient yourself to the layout of Project Web Access. This will give you some idea of how you can use Project Web Access as a partner in your assignment-tracking activities.

Logging On and Off

To log on to Project Web Access, follow these steps:

1. Start Microsoft Internet Explorer (at least version 6.0).
2. In the Address box, enter the URL for your organization's project server and then click Go.

   Your project manager or project server administrator provides you with the URL you need. Enter the URL exactly as provided, including any case sensitivity.

   If you are set up with a Forms account, the Project Web Access Sign In page appears (see Figure 23-1).

   Figure 23-1 If you are set up with a Forms account, you see the Sign In page whenever you start up Project Web Access.

3. Enter your user name and password as set up by the project server administrator and then click Sign In.

   Your user name here might be the same as for your corporate Windows account that you use to access your corporate network, e-mail, and so on. If your project server administrator set you up to use your Windows account, the Sign In page does not appear, and you connect to Project Web Access immediately.

   Alternatively, your project server administrator might have set you up with a separate project server account, called a Forms account. In this case, you'll need to enter that user name and the password that have been provided to you. You might need to add or change your password after you log on the first time.

   Your Project Web Access home page appears (see Figure 23-2).

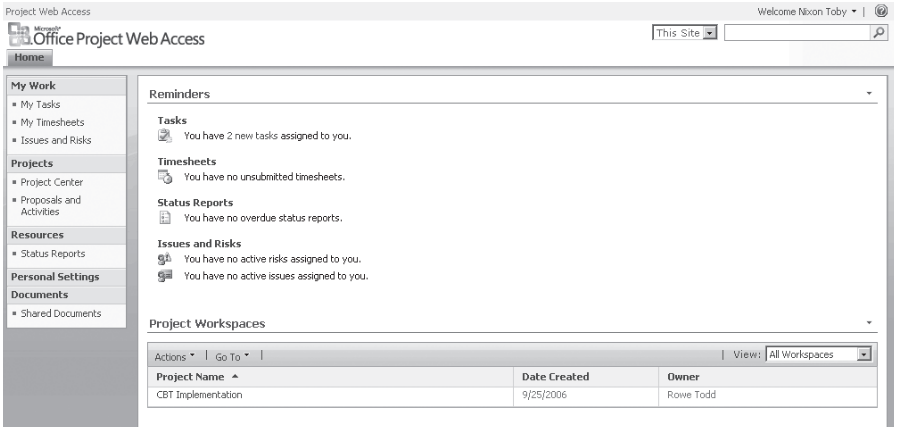


Figure 23-2 After a successful logon, the Project Web Access home page appears.

Create Shortcuts to Project Web Access

Because Project Web Access is your "command center" for project activities, it's a great idea to add the project server URL as a favorite Web site. When the Project Web Access Sign In page appears in Internet Explorer, click Favorites, Add To Favorites. Enter a name in the Name box and then click OK.

You might also consider adding a shortcut to Project Web Access on your Windows desktop. In Internet Explorer, click Favorites. Right-click the Project Web Access favorite you just created, point to Send To, and then click Desktop (Create Shortcut).

Note

If your project server administrator set you up with a separate project server Forms account, add a password the first time you log on to Project Web Access.

On the Quick Launch task bar, click Personal Settings. Click Change Password. Follow the instructions on the page that appears and then click Save.

When you are finished working with Project Web Access for the time being, it's important to log off. Because you have special permissions set up just for you in your Project Web Access user account, and you have access to possibly sensitive or proprietary project information and documents, it's important to practice your normal standards of corporate security.

To log off of Project Web Access, follow these steps:

1. In the upper-right corner of any Project Web Access window, click the Welcome button.
2. On the menu that appears, click Sign Out.

Finding Your Way Around

Working with Project Web Access is like working with most Web sites—you have content, links, and multiple pages.

On the page that's currently displayed, review what's available. Remember to use your scroll bar if it's showing. Click around and orient yourself to the content and controls. If you have used Microsoft Windows SharePoint Services or previous versions of Project Web Access, much of the site will seem familiar.

Using the Quick Launch Task Bar

The Project Web Access home page and other major pages show the Quick Launch task bar on the left side of the screen (see Figure 23-3). The Quick Launch task bar includes a list of links to all the major areas and functions throughout Project Web Access, for example, the Project Center, the Resource Center, and Shared Documents. Simply click a link on the Quick Launch task bar, and the page changes to show the item you clicked.

Figure 23-3 The Quick Launch task bar is your navigation center, taking you to all the areas of Project Web Access.

Working with Pages and Controls

The home page is the first Project Web Access page you see when you log on. By default, it includes a list of items that need your attention, for example, tasks that have been newly assigned or progress updates that are being requested by your project manager.

Your project server administrator sets up your home page to include the content most appropriate for your organization.

All pages throughout Project Web Access have certain standard controls, as follows:

- **Welcome button** In the upper-right corner of every page is a button that says Welcome with your user name. Click this button to see a menu that includes My Settings, Sign In As Different User, Sign Out, and Personalize This Page.

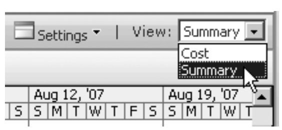
Help

Home

- **Help button** Next to the Welcome button is the Help button. If you ever need assistance while using Project Web Access, click the Help button. The Project Server Help window appears. A Help topic pertaining to the current page appears, but you can find other Help topics by typing a phrase or question in the Search For box or by clicking the Home button in the Help window and then browsing through the Contents.
- **Home** The Home tab is visible on every page. Click this tab to quickly move from an inside page on the Project Web Access site to the home page.

On most pages, such as the My Tasks page or the Project Center, there are additional standard controls, as follows:

- **Settings** Click the Settings menu on the right side of the menu bar. On most pages, this menu includes View Options. This opens a pane that provides methods for you to control what you're seeing in the table, for example, a type of filter or a date range. On other pages, the Settings menus might also include commands to Filter, Group, and Search. Clicking one of these commandsalso open a pane providing the necessary controls.
- **Select a view** Click the arrow in the View box to see a list of views. Views are different versions or layouts of content related to the current page. Some pages have just a single view, whereas others might have seven or eight views.



Working with Tables

Several pages throughout Project Web Access include a grid, or table, which lists information such as tasks, timesheets, or projects (see Figure 23-4).

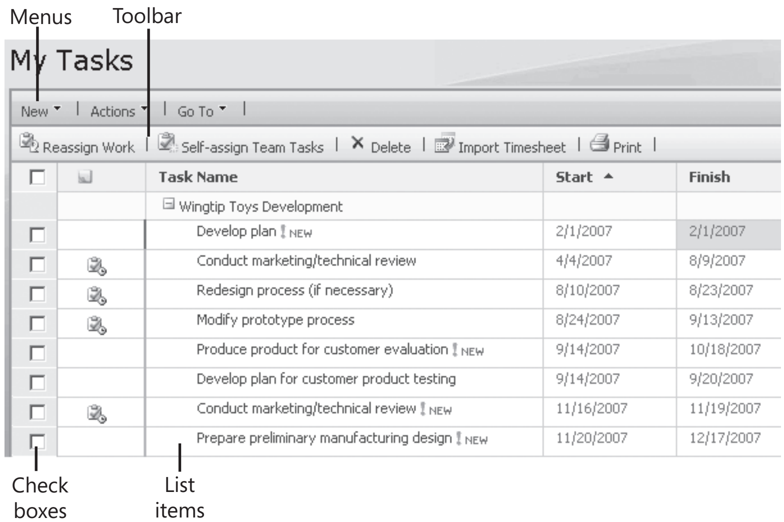


Figure 23-4 You use tables throughout Project Web Access to view and edit project-related information.

The following elements are present in most tables:

- **List items** The main feature of a table is the list of items. In most cases, you can click an item to drill down, for example, to edit task details or review project details.
- **Check boxes** Some tables include check boxes next to each listed item. Selecting the check box marks the item for further action, typically with a menu item. Items that are selected can be viewed to the right of the table.
- **Menus** Two or three menus are typically above a table, for example, New, Actions, and Go To. Click the menu name to view the drop-down menu of commands.
- **Toolbar** Several buttons are on a toolbar directly above the table. Typically, these buttons are for frequently used commands that are also available on a menu. For example, the My Tasks page includes buttons for Reassign Work, Delete, and Print.
- **Print the table** You can print the My Tasks, Gantt view, Timesheet, Project Center, and Project Details pages, among others. Click Actions, Print or Print Grid. A printable version of the table appears. Use the Print command in your Web browser to print the table.
- **Export the table to Excel** You can export tables to Microsoft Office Excel. On the page with the table, click Actions, Export Grid To Excel. The contents of the table appear in an Office Excel spreadsheet. Save the spreadsheet.

Working on Your Assignments and Updates

When the project plan is developed and tasks are assigned to resources, the project manager publishes the project plan to the project server. Then when you log on to Project Web Access, you see the tasks from that project that have been specifically assigned to you.

When working with your assignments, you can do the following:

- Review your new assignments and any changes to existing assignments
- Assign yourself to team tasks or reassign your tasks to other resources
- View the full project plan to see the context of your work
- Enter and submit progress information about your assignments

Reviewing New and Changed Assignments

As soon as you log on to Project Web Access, your home page lists any new notifications that require your attention. Notifications come from new or changed assignments or progress requests published to the project server for you by the project manager. The following are examples of notifications or reminders you might see in the Project Web Access home page (see Figure 23-5):

- New tasks have been assigned to you.
- Task information on an existing assignment has changed.
- The project manager is requesting a progress update on your assignments.
- A status report is coming due.

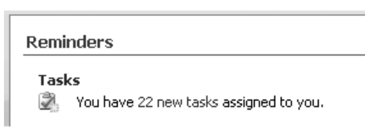


Figure 23-5 New assignments are posted on the home page.

When you want to see more details about one of the notifications, simply click the notification link. The page containing the details of the notification appears.

Reviewing New Assignments

The home page always includes notifications when a new task has been assigned to you. Click the notification link, and the My Tasks page appears. The other way to open the My Tasks page is to click My Tasks on the Quick Launch task bar.

The My Tasks page shows your list of tasks along with the fields appropriate to the progress tracking method that has been chosen by the project server administrator and your project manager. Typical fields might include the amount of scheduled work for each assignment, scheduled start date, scheduled finish date, and percentage complete.

New

When you receive new task assignments, they are marked with the !New assignment icon next to the task name. You don't need to take any further action to accept your new assignments. You can review the summary information on the page, or you can click the task name and review additional assignment details such as other resources assigned, predecessor and successor tasks, and notes (see Figure 23-6).

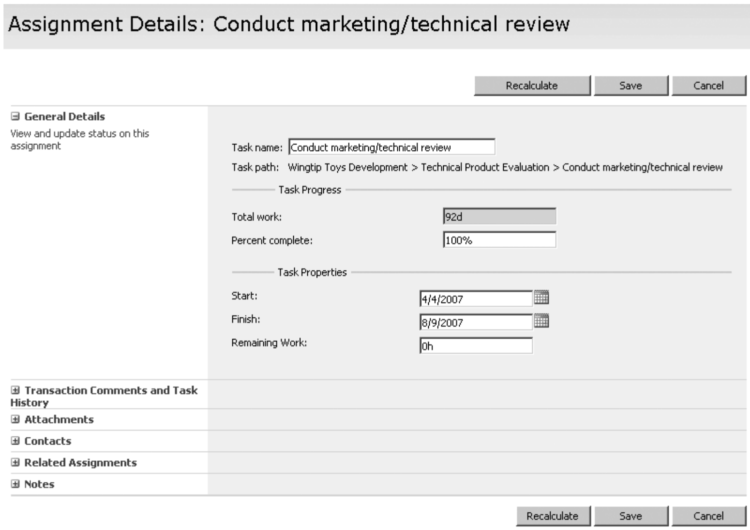


Figure 23-6 Click an assignment name to see additional information on the Assignment Details page.

All projects you are working on, even those owned by different project managers, show on your My Tasks page. By default, all your assignments are grouped by project.

Also by default, only assignments for the current period are listed. If you want to see all your assignments, first make sure that you have saved any changes to your assignments. Below the table, click Save All. click Settings, View Options. Clear the Show Only Current Tasks check box and then click Apply.

Rejecting an Assignment

On occasion, you might find it necessary to reject an assignment. Maybe the assignment is a duplicate of another one you already have. Maybe you feel you're not qualified to carry out the assignment. Maybe you have a scheduling conflict and cannot do it during the required time. Whatever the reason, if you need to reject an assignment, follow these steps:

1. On the My Tasks page, select the check box next to the assignment(s) you need to reject.


Delete

2. On the toolbar above the table, click Delete.

3. Click OK in the alert that appears.

   A strikethrough line appears through the assignment row.

4. Below the table, click Submit Selected.

   A dialog box prompts you to enter a comment about the task update you're about to submit.

5. Type a comment explaining to the project manager your reason for rejecting the assignment and then click OK.

   Entering a comment is not required to reject an assignment; however, it is a good communications practice.

   This comment will be stored as a transaction comment with the assignment and can be seen on your Assignment Details page in the Transaction Comments And Task History section.

This task update will appear on the project manager's Task Updates page, along with the comment you entered. If the project manager accepts your update, the project plan is changed to remove you as an assigned resource on the task. The project manager will then likely assign another resource to the task.


Update rejected

However, if the project manager rejects your update, the assignment will come back to you. In this case, the project manager is, in effect, rejecting your rejection of the assignment, and the project plan will remain unchanged in this regard. The strikethrough line is removed from the assignment on your My Tasks page, and the assignment is marked with the Update Rejected icon. If the project manager entered a comment about the reason for the rejection, you can read it on the Assignment Details page in the Transaction Comments And Task History section.

Reviewing Changed Assignments


Assignment Updated

During the course of a project, task information often changes. New tasks are added, durations change, and then there is a ripple effect for related tasks throughout the project. When the project manager publishes the project with the changed tasks, if any of your assignments are affected, they are marked with the Assignment Updated icon in the indicators column on the My Tasks page.

Review the assignment information in the table—the cells of changed information are highlighted with another color. You can also click the assignment name to review the details.


Notes

If the Notes icon appears with an assignment, either you or the project manager has added a note about the task. Double-click the icon to read the note. You can respond to or add to the note by clicking in the lower pane. When you submit this task, the note appears on the project manager's Task Updates page. When the project manager accepts your task update, your note shows as a task note in the project plan.

Reassigning a Task to Another Resource

By default, resources can transfer an assignment to another resource. This can be useful in groups that are used to shifting workload according to the skills, availability, and preferences of members in the group. This can also be useful in organizations in which a team lead or resource manager decides who should handle a particular assignment. In such a case, the project manager can assign the task to the team lead or resource manager, and that individual then reassigns the task to the right person.

This function is made possible by permissions set by the project server administrator. The individual project manager can also allow or disallow task reassignment.

> **Note**
>
> In Microsoft Office Project 2003, you could delegate a task to another resource and choose whether you see update information about the task. In Microsoft Office Project 2007, a resource can reassign a task to another resource. Those with resource manager privileges can review task updates, status reports, and timesheets.

If you have the capability to reassign tasks, do so by following these steps:

Reassign Work

1. On the My Tasks page, click Reassign Work.
2. On the Task Reassignment page, in the Select New Resource(s) section, find the task you want to reassign.
3. Click in the Select Resource box to see the list of resources for this project (see Figure 23-7).

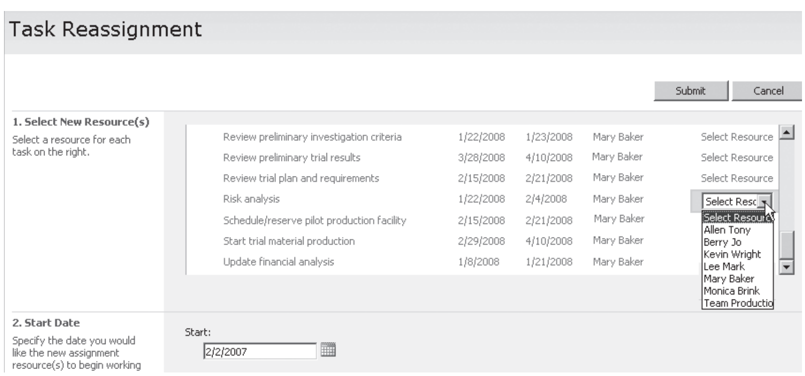


Figure 23-7 Use the Task Reassignment page to reassign tasks to other resources on the project

4. Change the Start Date or enter a comment if necessary.

   The project manager will see your comment when reviewing the task update reflecting this reassignment. Unless the reassignment is routine, it's a good idea to explain your reason for the reassignment.

5. Click Submit.

   This task update will appear on the project manager's Task Updates page as a task reassignment request. If the project manager accepts the update, the project plan is changed to show the reassigned resource on the task. If the project manager rejects the update, the assignment will return to you, and project plan remains unchanged.

Assigning Yourself to New Tasks

You can assign yourself to existing tasks you see in the project that you want to work on. If you're a member of a team assignment pool, you can assign yourself to a task assigned to a team of which you are a member.

You can also propose an entirely new task for a project you're working on and assign yourself to it. You can also create a mini-project or to-do list for your own personal use.

Assigning Yourself to an Existing Task

Your project manager might have published project information without assigning tasks to resources. By default, you can assign yourself to tasks in a published project in which you are a resource.

To see all the tasks in a project, first click Project Center on the Quick Launch task bar. Click the name of the project. The project details appear, including the task names. Take note of the summary task that contains the task you want to assign yourself to.

Once you have this information, you can assign yourself to the task by following these steps:

1. On the My Tasks page, click New, Task.

   The New Task page appears (see Figure 23-8).

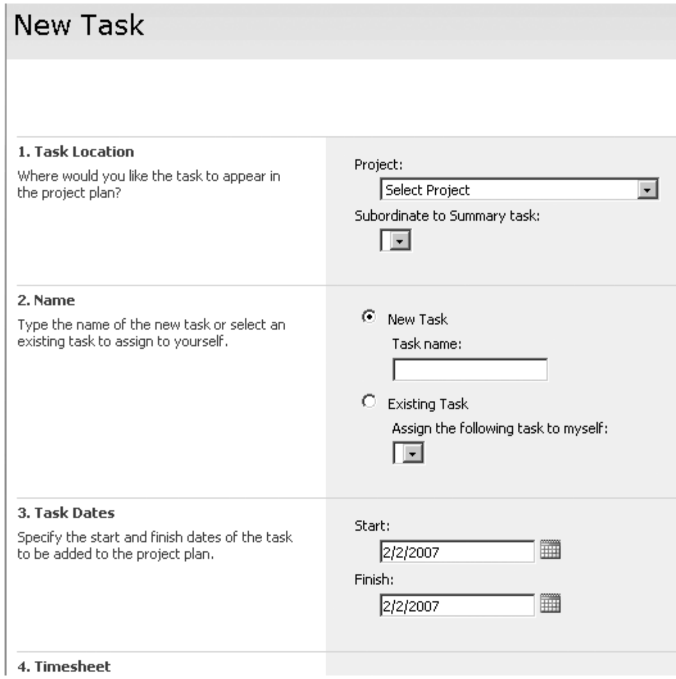


Figure 23-8 Use the New Task page to assign yourself to an existing task or to propose a new task in one of your projects.

2. In the Task Location section, click the project name.

   The Project drop-down list includes all the projects in which you are a resource.

3. In the Subordinate To Summary Task box, click the name of the summary task that contains the task you want to assign yourself to.

4. In the Name section, select the Existing Task option.

5. In the Assign The Following Task To Myself box, click the task you want.

   This box contains the list of tasks under the summary task you selected in step 3.

6. Complete the fields on the rest of the page as appropriate.

7. When finished, click Submit.

   Your request will appear on the project manager's Task Updates page as a new assignment request. If the project manager accepts your request, the project plan is changed to show you as an assigned resource on the task.

Assigning Yourself to a Team Task

Instead of selecting and assigning an individual to a task, sometimes a project manager prefers to specify that a particular department or group be responsible for the task.

Members of that group can then decide for themselves who will actually carry out the assignment.

This is the idea behind team assignment pools, also known as team resources, a new feature in Microsoft Office Project 2007. A team assignment pool might be a department, such as Business Development, or a group of individuals doing the same job, such as Analysts. When a project manager assigns a task to a team resource, that task is considered a team task.

> **Note**
>
> For you and your project manager to be able to use team resources, your project server administrator needs to have defined the team assignment pool in the enterprise resource pool. The administrator also needs to have identified you as a member of the team assignment pool.

To assign assign yourself to a team task, follow these steps:


Self-Assign Team Tasks

1. On the My Tasks page, click Self-Assign Team Tasks.

   Any tasks that have been assigned to the team to which you belong are listed in the table on the Team Tasks page.

2. Select the check box next to the team task to which you want to assign yourself.


Assign Task To Me

3. Click Assign Task To Me.

4. To return to the My Tasks page, click Go To, Tasks.

   The team task is now listed as one of your assignments. The project manager is notified on the Task Updates page.

Proposing a New Project Task

Suppose you're working on a project and you see that a task should be added. To propose the task to your project manager and to ensure that your work on the project is accounted for, you can create and submit a new task to the project manager.

To propose a new project task, do the following:

1. Identify where the new task might belong in the context of the whole project. Click Project Center on the Quick Launch task bar and then click the name of the project. On the Project Details page, take note of the summary task that should contain the new task you are proposing.

2. On the Quick Launch task bar, click My Tasks.

3. On the My Tasks page, click New, Task.

   The New Task page appears.

4. In the Task Location section, click the project name.
5. In the Subordinate To Summary Task box, click the name of the summary task under which your proposed task should be added.
6. In the Name section, be sure that the New Task option is selected.
7. Complete the fields on the rest of the page as appropriate.
8. When finished, click Submit.

   The new task appears in your task list. Your request also appears on the project manager's Task Updates page as a new task request. If the project manager accepts your request, the new task is added to the project plan with you as the assigned resource.

Note

Creating and assigning yourself to new tasks is a permission granted according to the user profile set up by your project server administrator.

Creating a To-Do List or Mini-Project Using an Activity Plan

In the course of carrying out your assignments, you might have a number of smaller activities that aren't big enough to be called tasks. With an activity plan, you can create a to-do list or mini-project for yourself to keep track of these kinds of tasks. Although an activity plan is stored on your project server, it has no connection to any project plan.

To create an activity plan, follow these steps:

1. On the My Tasks page, click New, Personal Activity.

   The New Activity page appears.
2. Near the top of the page, make sure that the Summary Information option is selected.
3. In the Name And Description section, enter a name for your activity plan. Type a description if you want and then enter the start date.
4. In the Project Custom Fields section, complete the field information for any custom fields you want to add to your activity plan.
5. When finished, click Save.

   The new activity plan is saved to your project server, and the Work Details view of your new activity plan appears. Make sure that the Work Details option is now selected (see Figure 23-9).

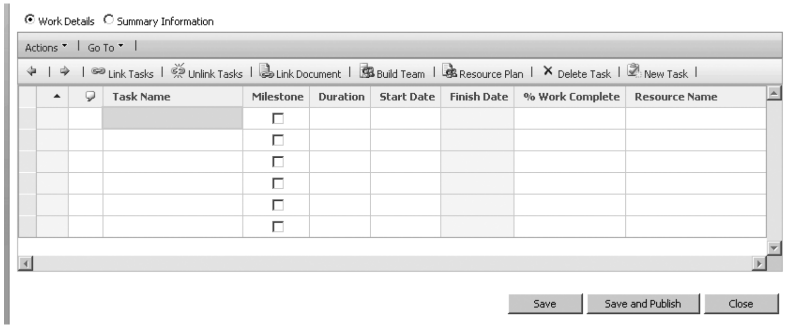


Figure 23-9 Specify the tasks for your to-do list or mini-project by using the New Activity page.

6. Enter the details of your activity plan. Enter task names and durations. Use the buttons on the toolbar to indent outline levels or insert new tasks as needed.

Link Tasks

7. If you want to link tasks with a finish-to-start task relationship, select the predecessor task by clicking the row header. Hold down Ctrl and then click the row header for the successor task. Click the Link Tasks button.

   An icon in the indicators field shows that the two tasks are linked. In an activity plan, you can only link tasks with a finish-to-start task relationship.

8. Click Save to save the activity plan to the project server but keep it to yourself. Click Save And Publish to save the activity plan to the project server and also make it available for others to see and use.

   Unpublished activity plans are useful when you just need to keep a personal to-do list for yourself. Published activity plans are useful when used as a mini-project that you want to be able to share with other resources.

9. When finished working with your new activity plan, click Close.

   Your activity plan is listed on the Proposals And Activities page. If you published the activity plan, others will be able to open it. If you only saved the activity plan without publishing it, only you can see it in the list.

To view and change summary information or change task details about your activity plan, follow these steps:

1. On the Quick Launch task bar in Project Web Access, under Projects, click Proposals And Activities.

2. On the Proposals And Activities page, click the name of your activity plan.

   By default, the Work Details view of the activity plan appears.

3. Make any changes you want to the task information and then click Save.

4. If you need to view or change summary information, above the table, select the Summary Information option.

   The Summary Information view of your activity plan appears. In this view, you can review or change the activity plan description, the start date, the activity plan owner, and so on.

5. When finished, click Save or Save And Publish. Click Close.

For information about adding resources to an activity plan or converting an activity plan to a project, see the section titled "Creating Proposals and Activity Plans" in Chapter 22.

Working with Your Assignment Information

The My Tasks page is your hub for your project assignment information and is likely the place where you spend the most time when working in Project Web Access.

On the My Tasks page, you can update progress information. You can show all your assignments or just the ones for the current period. You can switch to a Gantt Chart view and then view, filter, and group your assignments. You can print a table or export it to Excel.

> **Note**
>
> In Microsoft Office Project 2003 and earlier versions, the My Tasks page was is called the Timesheet. In Microsoft Office Project 2007, there is a new page with specific Timesheet functions separate from those on the My Tasks page.

Viewing or Updating Assignment Fields

Although the fields in the table of the My Tasks page show the summary information for your assignments, you can see and update specifics by clicking the assignment name to open the Assignment Details page. Here you can:

- Update progress information.
- Review the history of communications on this assignment between you and the project manager.
- Review any issues, risks, or documents associated with this task.
- See a list of and send e-mail to the other resources on this project.
- Review this task's predecessors and successors.
- Read and respond to task notes stored with this task in the project plan.

In certain fields in the My Tasks summary table, you can also enter progress tracking information, for example, % Complete or Remaining Work. You can simply double-click in the field and change the value.

Certain types of custom fields might have been created and added to your Tasks list by the project manager or project server administrator. Some of these custom fields can contain a value list from which you can choose an appropriate option. If such a custom field is part of your Tasks list, and if you have read-write permission, click in the field. A drop-down list shows all the choices. Click a choice, and that value now appears in the field. This procedure makes it easy for you to enter the correct form of information while maintaining project data integrity.

Arranging Information in the Table

You can customize your view of assignments to show, hide, or sort information, as follows:

- To show only tasks for the current time period in your Tasks list, click Settings, View Options. Select the Show Only Current Tasks check box. This check box is selected by default.
- To show all tasks to which you are assigned, clear the Show Only Current Tasks check box.
- You can sort assignments by a field in the Tasks table—for example, by Task Name or Finish Datemjn. To do this, click the heading of the field column you want to sort by. The field is sorted in either ascending or descending order. To sort in the other direction, click the column heading a second time.

Viewing Your Tasks in a Gantt View

You can switch to a Gantt chart view of your assignments. In the My Tasks page, click Go To, Tasks Gantt View. A Gantt chart showing your assigned tasks appears (see Figure 23-10).

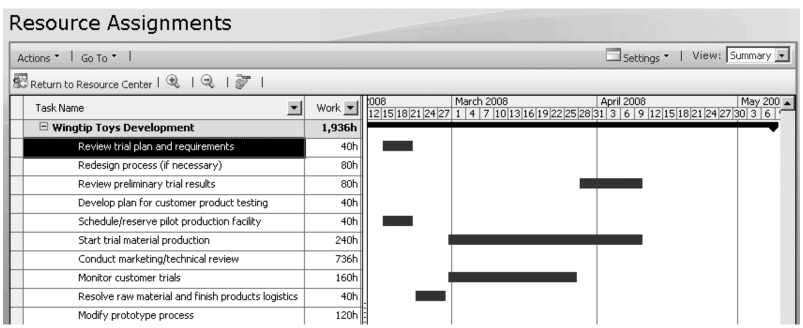


Figure 23-10 The Gantt view shows a graphic view of your assigned tasks.

On this page, you can:

Scroll To Task

- Click a task and quickly display the Gantt bar for it by clicking Scroll To Task.

Zoom In

- Zoom the chart area in to expand the length of the Gantt bars and see shorter increments of time, for example, from days to hours.

Zoom Out

- Zoom the chart area out to compress the length of the Gantt bars and see larger increments of time, for example, from days to weeks.

To return to the My Tasks page, click the Back button on your browser.

Rearranging Your Assignments

In the Gantt view, you can filter, group, or search your assignments by criteria you choose.

To filter assignments via a built-in filter, follow these steps:

1. On the Quick Launch task bar, click My Tasks.
2. Click Go To, Tasks Gantt View.
3. Click Settings, Filter.
4. In the filter pane that appears above the Gantt chart, click Custom Filter.
5. In the Define Custom Filter dialog box, in the Field Name box, click the field you want to filter by, for example, % Work Complete or Finish (see Figure 23-11).

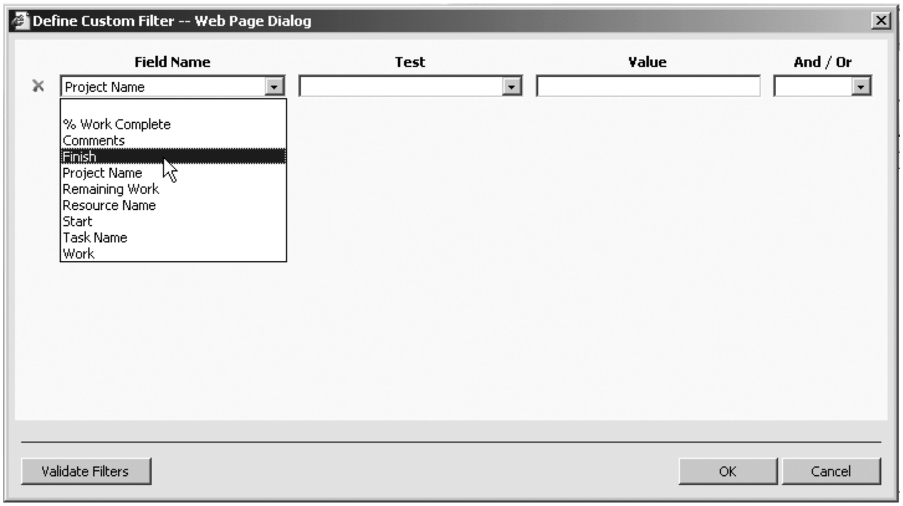


Figure 23-11 Click the field by which you want to filter your assignments.

6. In the Test field, enter the test criteria, for example, Equals or Contains.
7. In the Value field, enter the value for the field and then click OK.

   The task list changes immediately to show only those tasks that meet your filter criteria.
8. To see all tasks again, click All Assignments in the Filter box.

You can also select the AutoFilter check box to add the AutoFilter arrows to each column in the Tasks table. Click one of the arrows and then select a value by which to filter the list. To see all tasks again, click the AutoFilter arrow and then click (All).

To group assignments by a particular field, follow these steps:

1. On the Quick Launch task bar, click My Tasks.
2. Click Go To, Tasks Gantt View.
3. Click Settings, Group.

4. In the group pane that appears, click the arrow in the Group By box to see your grouping choices in the drop-down list.
5. Click the field you want to group by.

   The task list changes to reflect your grouping.
6. If you want a subgroup within the group, click the second field in the Then By box.
7. When you want to return to the original nongrouped order, click None in the Group By box.

To search for an assignment on this page, click Settings, Search. Search controls appear in a pane.

To close the Filter, Group, or Search pane, click the X (close) button in the upper-left corner of the pane.

Glimpsing the Big Project Picture

By default, you can review a list, the summary information, and component task information for all the published projects in which you're a resource. This is helpful to see the overall context of your assignments.

To review information about projects you're working on, follow these steps:

1. On the Quick Launch task bar, click Project Center.

   The Project Center page appears. The projects are listed in a summary project Gantt Chart (see Figure 23-12). Summary information typically includes the project start and finish dates, percentage complete, amount of work, and the owner or project manager.

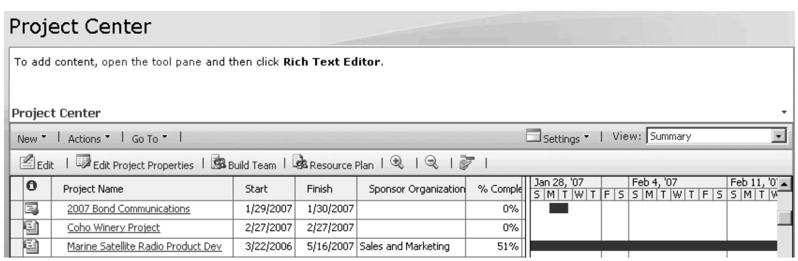


Figure 23-12 Go to the Project Center to review the list of your projects.

2. Click the link for the project whose tasks you want to review.

   The Project Details page appears (see Figure 23-13). The tasks, along with their durations, start and finish dates, and current progress are listed.

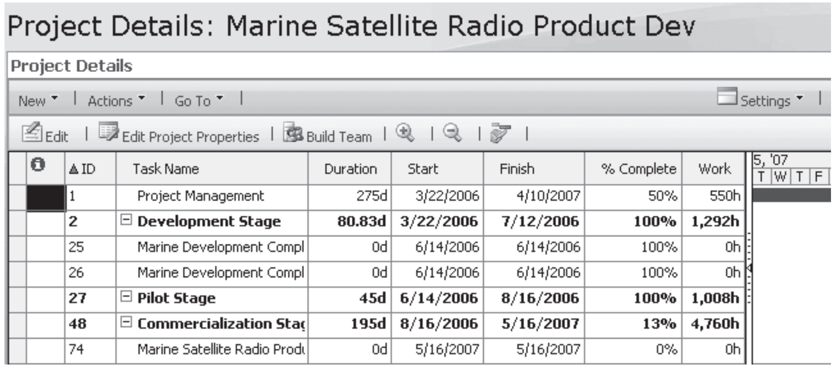


Figure 23-13 View the entire project schedule in Project Web Access.

Note

Whether you're reviewing a project summary or all the tasks within a project, you can set view options, sort, filter, group, and search. Click Settings and then click View Options, Filter, Group, or Search.

Depending on your user permissions and how your project server administrator has set up views, you might be able to review the project by different sets of information. In the upper-right corner of the Project Center or Project Details page, click the View box and review your choices.

You can also open the Web-based workspace for the project, a new feature in Project 2007 based on Windows SharePoint Services. In the workspace, you can read announcements or calendar information. You can see any documents, issues, or risks associated with the project. You can view and participate in discussions about the project. To open a project workspace, from the Project Details page, click Go To, Project Workspace. The workspace opens in a separate Web browser.

Project Documents, Issues, and Risks

Documents, issues, and risks can be added, tracked, linked with tasks, assigned responsibility, and eventually closed. They all become an important aspect of seeing the project through to a successful completion. They are also instrumental in capturing project archival information for use in planning future projects.

Note

By default, Project Web Access resources are set up with the permission to view documents, issues, and risks. Depending on how the administrator has set up Project Server and Windows SharePoint Services, resources might also have the permission to add and edit risks, issues, and documents.

For more information, see the section titled "Managing Documents, Risks, and Issues" in Chapter 22.

Tracking Assignments and Submitting Progress Updates

After your assignments are established, you're ready to work on those tasks. Of course, your project manager wants to be informed periodically of what you're accomplishing, as well as any snags you might be running into. You will provide up to three categories of progress information, depending on your organization's time and status tracking requirements:

- Specific work hours or percentage complete on your individual assignments, also known as actual work, or actuals
- Text-based status reports in a format set up by your project manager
- Hours or days spent on different categories, such as billable and nonbillable time, nonproject administrative time, nonworking time, and so on

Own Another Resource's Assignments

When the project manager assigns a task to a team member, by default, that resource becomes the assignment owner, that is, the person responsible for providing status updates about the assignment.

However, certain resources do not have Project Web Access readily available to them or have some other reason they cannot provide status updates. Sometimes the resource responsible for carrying out a task is a piece of equipment, and status updates will be required on the progress of that equipment.

In these cases, the project manager can designate an assignment owner who is different from the assigned resource. If you are designated as an assignment owner for another resource's assignments, those assignments appear on your My Tasks page. If the Resource Name field is present in the table, it shows the other resource name. Click an assignment name, and the Contact section in the Assignment Details page shows the name of the assigned resource.

As the assignment owner, you are not responsible for carrying out the other resource's assignments, but you are responsible for progress updates and status reports to the project manager about these assignments.

Tracking Progress Information

While you work on your assignments, it's good practice for you to keep your My Tasks page updated. At the end of each day, for example, you can log the percentage complete, the remaining time on an assignment, or the number of hours worked on each task. Which of these three you update depends on how your My Tasks page has been set up by your project server administrator.

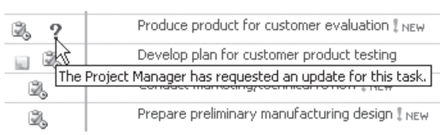
If all the fields you need to update are showing in the assignments table on the My Tasks page, you can double-click the value in a particular field and type the new value. Or, click the assignment name to open the Assignment Details page. In the General Details section, update the appropriate fields. When finished, click the Save All button below the table. This saves your information without submitting it for review by your project manager.

Keeping your assignment progress information up to date each day will make it all the easier for you to quickly send a progress update when your project manager asks for it.

Working with Progress Update Requests

As soon as you have assignments on your My Tasks page, you have the ability to submit progress updates. Your project manager and the rest of the project team might have agreed on when progress updates should be submitted, for example, every Friday at noon or the last day of each month. Your project manager might submit a project update request at those times or just expect you to submit a project update without a reminder. Your project manager can also explicitly request progress updates at any time. Either way, such requests appear as a reminder on your Project Web Access home page, and you also receive an automated e-mail notification.

Whenever your project manager submits a progress update request, a question mark icon appears next to the assignment on the My Tasks page.



Note

The project manager who created the project is typically the project owner. By default, this project manager is also the status manager. A status manager different from the project manager can be designated for a project. This person is responsible for reviewing and accepting or rejecting progress updates and status reports for a project. You can see who the project manager and status manager are in the Contacts section of the Assignment Details page.

Submitting Progress Information

Submitting your progress updates, or actuals, on your individual tasks is the heart of the Project Web Access functions. Submitting your assignment actuals ensures that your project manager is well-informed about how you're doing on your tasks and also knows whether you have too much work or whether you need more time or assistance. In addition, the actuals you submit help everyone on the project team anticipate potential problems or bottlenecks and come up with solutions before they become crises.

You've already seen how you submit changes to your assignments, such as when you reassign a task to another resource, or when you create a new task for the project. The project manager is notified of your task update and decides whether to reject your change or accept it for incorporation into the project plan.

Submitting progress updates containing your actuals works the same way. You enter your actuals on your assignments and then submit them to the project server. Your project manager reviews your actuals and accepts them. This acceptance then updates the progress information in the project plan.

To enter and submit a progress update of assignment actuals, follow these steps:

1. On the My Tasks page, click the assignment name to open the Assignment Details page.
2. Under Task Progress or Task Properties, enter actuals for your assignments in the fields designated for this purpose by your project server administrator and project manager.

   If your project tracks percentage of work complete, the Task Progress section includes the Percent Complete field. Use this field to report percentage complete on each of your assignments at this point, for example, 15%, 50%, or 100% (see Figure 23-14).

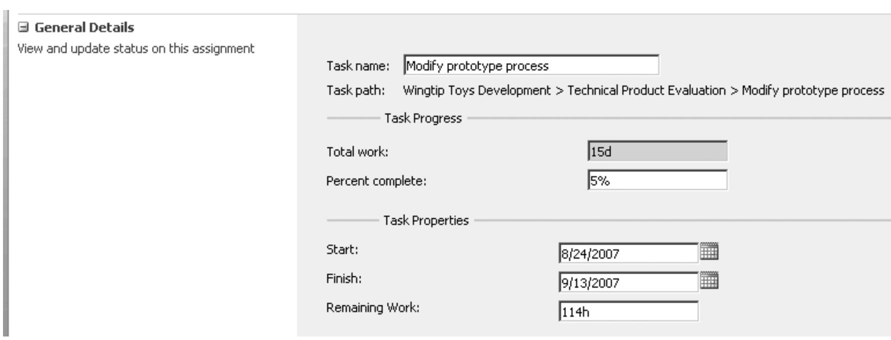


Figure 23-14 Enter actuals in the General Details section on the Assignment Details page.

   If your project tracks total actual work and remaining work for the reporting time period, the section includes the Actual Work and Remaining Work fields. In the Actual Work field, enter the amount of time you spent on each assignment. In the Remaining Work field, enter the estimated number of hours needed to complete the assignment.

If your project tracks hours of work done per time period, time periods such as days or week are provided. In the timephased fields for each time period (day or week), type the amount of time you spent on each assignment.

You might do this for all your current assignments or for those assignments marked with the update request (question mark) icon. It's perfectly fine to report on more assignments than the project manager requested. In fact, it's good practice to submit an update whenever there is a significant change or accomplishment on an assignment.

3. To save the changes you've made to your tasks while still updating your actuals, click Save.

4. To submit your progress updates, on the My Tasks page, select the check boxes for all the assignments you want to submit and then click the Submit Selected button below the table.

   The Submit Changes dialog box appears, in which you can type a comment regarding the task update. The same comment will show for all assignments in this group you're submitting. Click OK.

   The progress updates for your selected assignments are submitted to the project server and your project manager. When your project manager reviews and accepts your update, your actuals update the task progress information in the project schedule.

If you're updating assignments from multiple projects or multiple project managers, you don't need to do anything special. When you submit updates from multiple projects or for different project managers, the project server makes sure that the information is distributed to the correct managers and ultimately updates the correct project schedules.

Protecting Actuals

Depending on how your project server administrator has set Project Web Access options, the integrity of actuals that you and other resources submit can be protected. This is crucial if your actuals are directly submitted to your organization's general ledger system to produce customer invoices.

If your project tracks progress by hours of work per time period, your project server administrator can restrict when you can enter actuals on your My Tasks page. Locking the time periods ensures that you report hours only for current time periods, not for time periods in the past or future.

For more information about how the project server administrator sets up the My Tasks page, see the section titled "Setting Up Team Member Work Pages" in Chapter 21.

Submitting Text-Based Status Reports

Your project manager might design a status report for you and the other resources to complete and submit periodically. This is different from your progress updates, which deal strictly with assignment information such as actuals, new assignments, or reassigned tasks. Status reports are completely text-based and are not incorporated into the project plan. The project manager sets up the time period and the topic headings, such as “Accomplishments,” “Goals,” and “Potential Problems.” At the designated time periods, you write your status report and submit it to the project server. When everyone’s status reports are in, the project manager can review the compiled team status report.

After the project manager first sets up the status report, you’ll see an automated reminder notification on your Project Web Access home page whenever a status report is coming due.

To create and submit your text-based status report, follow these steps:

1. On the Quick Launch task bar, under Resources, click Status Reports.

   The Status Reports page appears, showing a table of status reports for different projects (see Figure 23-15).

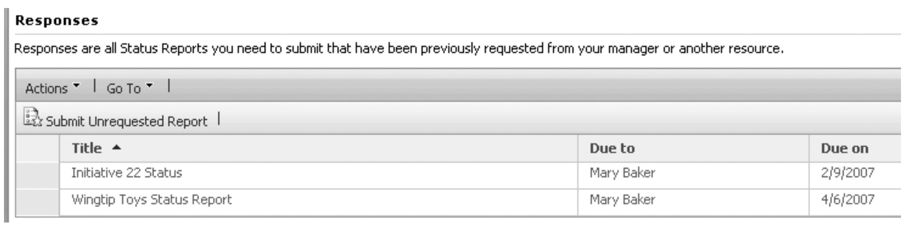
   

   Figure 23-15 The table on the Status Reports page shows all status reports for your various projects, which project manager receives them, and when the next one is due.

2. In the table, click the name of the status report you want to write.

   The Status Report Response page appears.

3. Change fields in the To and Period sections if needed.

4. In the Sections area, type your status report in the boxes provided.

   The headings of the boxes reflect the points that the project manager wants all resources to report on for each status report.

5. If you want to add another section of information, click the Click To Add Section button. Type a title for the section and then click OK. In the new box, enter your additional information.

6. If you just want to save your report and update the project server later, click Save.

   This option is useful if you’re not quite finished with your status report, or if it’s not time to submit the report yet. It’s a good idea to enter status information whenever you have a significant accomplishment or encounter a possible blocking problem. Then when the status report comes due, you'll have most of your information in place already.

7. When you're ready to submit your status report to the project server and your project manager, click Send.

   Your status report is submitted to the project server. The project server automatically merges your status report with the status reports from the other resources for the same time period for your project manager to view.

Submit Unrequested Report

You can also send a status report that's separate from the normal status report format or that's going to a different resource. You can specify your own status report title, the resources who should receive the status report, and which sections it should contain. To do this, on the Status Reports page, click Submit Unrequested Report. Complete the fields on the Unrequested Status Report page. In the Sections area, click the Click To Add Section button. Type a title for the section and then click OK. In the new box, enter your additional information.

Logging Time Using Timesheets

Not every minute of every day can be devoted to your project assignments. You know that you have to take time taken for nonproject tasks such as attending staff meetings and participating in training workshops. And then there are also vacations, holidays, and personal time off.

Project Web Access has a new method for tracking different categories of time—timesheets. With timesheets, you can log how you spend your time throughout the workday and the workweek, whether it's on project tasks, nonproject working, or nonworking time.

Such detailed tracking is important in organizations that have specific time reporting requirements, either for their own internal purposes or for working with their customers. For example, certain organizations need to see all billable and nonbillable time, scheduled and actual time, overtime, and so on. Your project server administrator sets up the format for the timesheet as it is to be used for your organization's needs.

Note

If your organization does not need such exact time tracking, it might not have implemented the timesheet feature. If this is the case, either you will not see it in Project Web Access, or it will be an empty page.

Working with Your Timesheets

You submit timesheets to your timesheet managers on a periodic basis based on your organization's reporting period. Common reporting or fiscal periods include calendar months or 4-week periods. When you log on to Project Web Access, your list of reminders includes any timesheets that are coming due.

To see a list of timesheets for your reporting periods, click My Timesheets on the Quick Launch task bar and then click My Timesheets. The list of timesheets appears (see Figure 23-16).

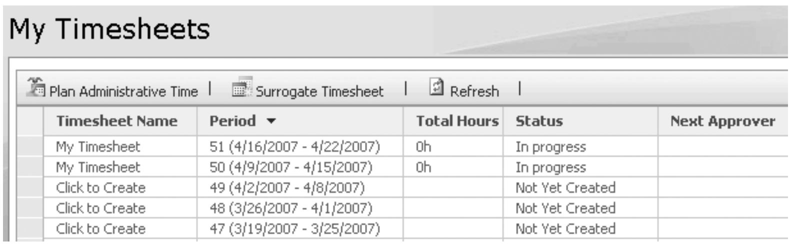


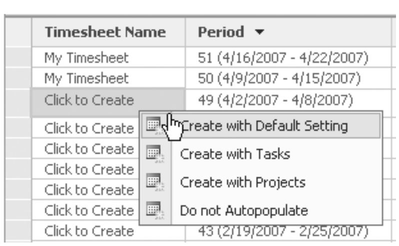
Figure 23-16 Timesheets for each of your organization's reporting periods are listed on the My Timesheets page.

To see a different set of timesheet periods, click the arrow in the View box and then click the set of timesheets you want.

The first time you open your list of timesheets, the entry in the Timesheet Name field for all of them might be Click To Create. Your project server administrator has already set up the information your timesheets are to include, as follows:

- Task assignments taking place during this reporting period
- The list of all projects to which you are assigned
- No tasks or projects; only the administrative time categories

In spite of this default, you can create your timesheet with the choice you want of these three. Rest your mouse pointer to the right of the Click To Create link until an arrow appear and then click the arrow. The drop-down list shows four options, the first one being to create with the default setting.



Make a selection and then the timesheet appears (see Figure 23-17).

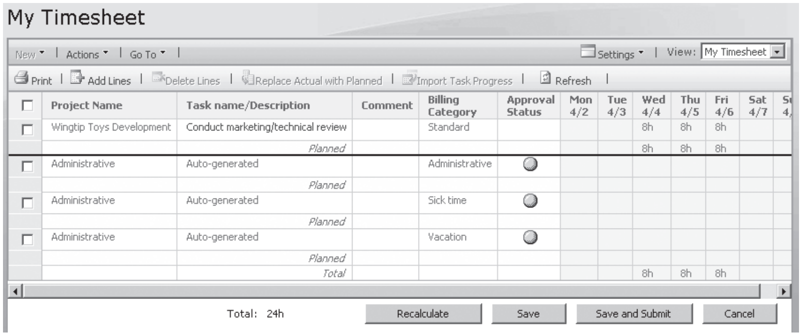


Figure 23-17 The timesheet for a particular period includes fields for each day in the reporting period.

To complete and submit your timesheet, follow these steps:

1. In the Timesheet Name column, click the name of the timesheet for the period for which you want to log your time.
2. To enter time on a day for a certain category, whether it's a project name, a task name, or administrative time such as Vacation, click in the day field for the timesheet item and then type the number of hours, for example, **8h**.
3. To save your changes to a timesheet, click the Save button. It's a good idea to keep your timesheet up to date as you work through the period. This way, when your timesheet comes due, it will be nearly complete and ready to submit.
4. When your timesheet is due and ready to submit to your timesheet manager, click the Save And Submit button.
5. In the Submit Timesheet dialog box, type a comment if you'd like, and then click OK.

   The timesheet is saved, and your timesheet manager will see a notification that your timesheet is available for review and approval.

   Your timesheet manager could be your supervisor, a resource manager, or other person in your organization who is responsible for reviewing and approving timesheets.

> **Note**
>
> In previous versions of Microsoft Office Project Web Access, the task progress page was called the timesheet. Now in Project 2007, the timesheet is a different page and serves a different, but complementary, purpose to the task progress page, which is now called the My Tasks page.

Copying Items Between My Tasks and My Timesheets

Items in your timesheets can be used independently of the assignments on your My Tasks page, or they can work together. You can bring assignments from the My Tasks page into a timesheet. You can also bring timesheet items from the timesheet onto your My Tasks page. Doing this can help consolidate your time tracking for the different categories and save you some effort.

Import Task Progress

If a timesheet has already been created without your tasks for that period and you want to add them, click Import Task Progress. In the alert that appears, click OK. Tasks for that period appear in your timesheet.

You can also use the Add Lines command to add any existing assignment or create an entirely new item as a line in your timesheet. To do this, follow these steps:

Add Lines

1. In the timesheet to which you want to add an assignment line, click Add Lines.

   The Select Task dialog box appears (see Figure 23-18).

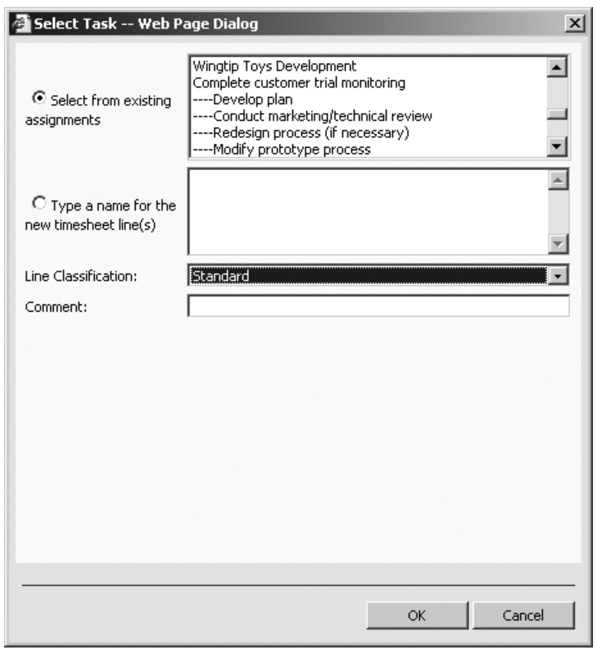


Figure 23-18 Specify whether you want to add a timesheet line from an existing assignment or create an entirely new line.

2. To add a line from one of your task assignments, make sure the Select From Existing Assignments option is selected and then click the name of the assignment in the box.

   To create a new line, select the Type A Name For The New Timesheet Line(s) option and then type the name for the line.

3. In the Line Classification box, select the billing category for the new line. These classifications are preset.
4. Enter a comment if necessary and then click OK.

   The new line appears in your timesheet.
5. Click Save.

To import timesheet items onto your My Tasks page, go to the My Tasks page and then click Import Timesheet. In the Timesheet field, select the reporting period of the timesheet you want to import. Click Import.

> **Note**
>
> Data already entered in the My Tasks page or the My Timesheet page can be overwritten by imported data.

Requesting Nonproject or Nonworking Time

If you are planning a vacation or an upcoming week of training, for example,you can account for this in your timesheet by requesting administrative time. Certain categories of administrative time are set up by your project server administrator to reflect common types of nonproject working time or nonworking time. You can specify when you plan to need administrative time, and it becomes a part of your timesheet. Some categories require management approval; others do not.

> **Note**
>
> In Project 2003, the administrative project was introduced, in which users could create nonproject working time and nonworking time categories and then assign themselves to these categories. In Project 2007, this feature has become a part of the timesheet as administrative time.

To specify administrative time, follow these steps.

Plan Administrative Time

1. In your list of timesheets, click Plan Administrative Time.

   The Administrative Time dialog box appears.
2. In the Category box, click the category for the administrative time you are planning, such as Vacation or Administrative (nonproject working time).
3. In the Period box, click the reporting period during which the event will take place.

   The timesheet updates to reflect your selected reporting period.

4. In the timesheet area, enter the number of working hours you will use for the event in the appropriate day. Notice that the timesheet area has a Committed and Planned field for each day. If the event is in the future, enter the number of hours in the Planned field for the day (see Figure 23-19). If the event is in the past, for example, for Sick Time, enter the number of hours in the Committed field.

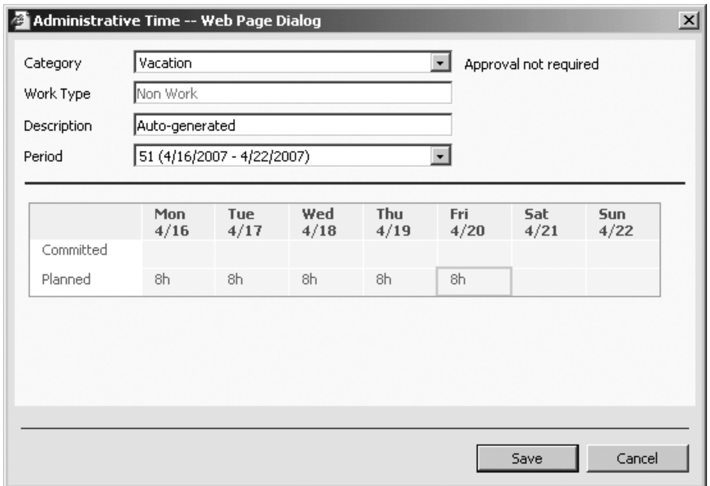


Figure 23-19 Identify vacation, sick time, or nonproject working time in the Administrative Time dialog box.

5. Click Save.

   The administrative time is saved. When you open the timesheet for the time period in which you entered the administrative time, it reflects the hours you entered.

If you have chosen a category that requires management approval, your timesheet manager will get notification of it and then accept or reject your request.

Setting Up E-Mail, Reminders, and Calendars

Through Project Web Access, you have tools at your disposal for making your life a little easier. You can set up automated notifications so that you can receive e-mail reminding you about various aspects of your project and progress tracking. You can specify when you want to see reminders appear on your Project Web Access home page regarding your assignments and status reports. You can also integrate your project tasks into your Microsoft Office Outlook calendar.

Setting Your E-Mail Alerts and Home Page Reminders

To configure automated e-mail alerts and reminders to yourself, follow these steps:

1. On the Quick Launch task bar, click Personal Settings.
2. Click Manage My Alerts And Reminders.
3. Review the options in the Tasks and Status Reports sections, and select the check boxes and make further specifications for the events for which you want to be notified via e-mail (Task Alerts) and see reminders on the Project Web Access home page (Task Reminders).

   Clear the check boxes for events for which you do not want an e-mail notification or reminders.

   You can set up notification and reminder options for new or changed tasks, upcoming tasks, overdue tasks, and for status reports (see Figure 23-20).

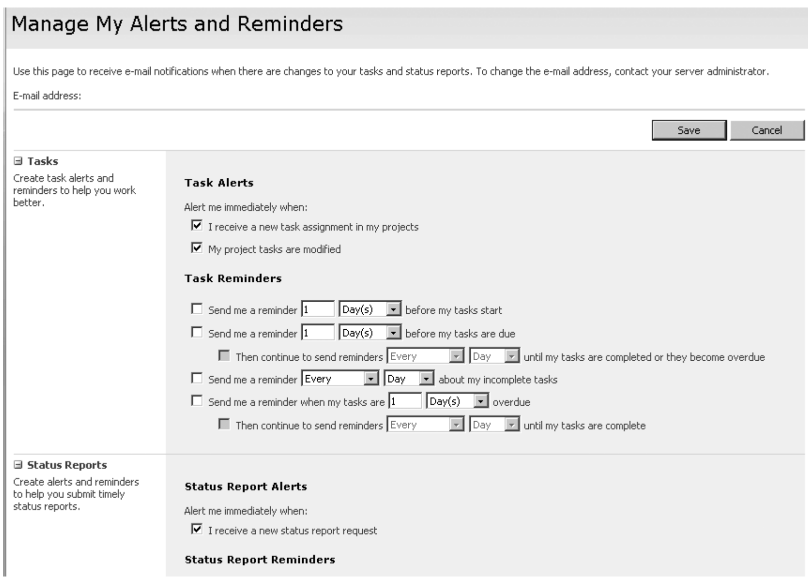
   

   Figure 23-20 Set up your e-mail alerts and reminders about tasks and status reports.

4. When finished, click Save.

Working with Project Tasks in Outlook

If you use Office Outlook, you can keep track of your assigned tasks in your Outlook Calendar, along with your other appointments. You can update progress on your project assignments in the Calendar and report the status back to your project server directly from Outlook.

Project tasks can be displayed as free or busy time, just like any other Calendar entries.

As an alternative, you can also add your assigned project tasks to your Outlook Tasks list. Either way, you can get Outlook reminders for your project tasks, and report progress on them back to Project Web Access.

If you choose to integrate your project assignments with Outlook like this, your assignments are still published from Project Professional to the project server. At that point, your assignments appear in Outlook as well as in Project Web Access. You still use Project Web Access for the custom fields, project views, status reports, and other project-related features. However, you now have a choice to work in either Project Web Access or Outlook to review, track, and update your project assignments.

From Outlook, you can update your assignments and send actual progress information back to the project manager via the project server. As usual, the project manager reviews and approves your updates and incorporates them into the project plan.

Setting Up Project Web Access and Outlook Integration

The first step in working with your Project Web Access assignments in Outlook is to download the Outlook integration add-in. To do this, follow these steps:

1. On the Quick Launch task bar, click Personal Settings.
2. Click Set Up Outlook Sync.
3. Read the Synchronize Your Tasks With Outlook page, which explains what you can do with Outlook integration, as well as system requirements and download instructions for the Outlook integration add-in.
4. Click Download Now.
5. In the alert that appears, click Run (or Open).
6. In the security alert that appears, click Run.
7. Work through the Microsoft Office Project 2007 Add-In For Outlook Setup Wizard pages until the add-in is successfully installed.

To establish the connection between Outlook and Project Web Access, follow these steps:

1. In Outlook, click Tools, Options.
2. In the Options dialog box, click the Project Web Access tab.
3. Under Integrate With, select Outlook Tasks or Outlook Calendar.
4. Under Date Range, specify the time period from which you want assignments to be imported.

   If you want to import assignments from the standard reporting time period set up in Project Web Access, select the Project Web Access Date Range option.

   If you want to import assignments from a different time period (for example, the next 4 weeks), select the Next option and then select the date range.
5. Under Advanced, click the Advanced Options button.
6. Click the Enter Login Information button.
7. In the Project Web Access URL box, enter the address to your project server, for example, http://servername/projectserver.

   If you click the Test Connection button, Outlook tests the URL you entered and makes sure that it's a valid project server. If your project server account uses a Forms account for authentication (rather than Windows authentication), you will be prompted for your password.
8. Under When Connecting, specify whether you should be validated with your Windows user account or whether you're using a separate Project Server account name. If your project server account uses Forms authentication, click the Use A Project Server Account option and enter your user name if necessary. Click OK.
9. In the Advanced Options dialog box under Assignment Import, specify your availability for other appointments during the time of your assignments.

   Just as with other Outlook appointments, you can show your availability as free, busy, tentative, or out of the office. The setting you choose becomes the default for all project assignments in Outlook. You can still change the availability for individual assignments as needed.
10. Under When Importing From Project Web Access To Outlook, specify whether you want reminders. Click OK.
11. In the Options dialog box, click OK.

Importing Project Assignments into Outlook

To import assignments from Project Web Access into Outlook, follow these steps:

1. Open the Outlook Calendar view or Tasks view.

   Which one you choose depends on whether you selected integration with Outlook Tasks or Outlook Calendar on the Project Web Access tab in the Options dialog.

2. If necessary, show the Project Web Access toolbar by clicking View, Toolbars, Project Web Access.

Import New Assignments

3. On the Project Web Access toolbar, click Import New Assignments.

   If the Enter Password dialog box appears, enter your Forms account password.

   The Import Assignments From Project Web Access dialog box appears, listing your project assignments (see Figure 23-21). These are the assignments within the date range you set previously in the Options dialog box.

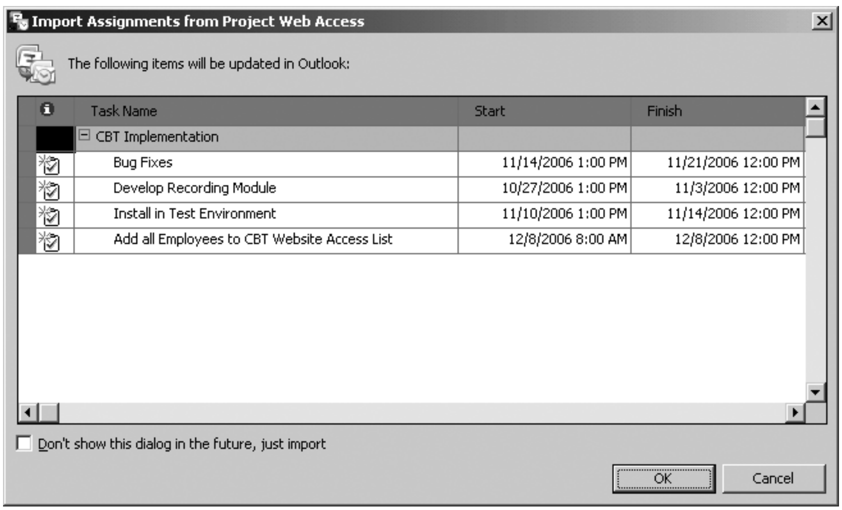


Figure 23-21 Review the assignments that will be imported from Project Web Access into Outlook.

4. Click OK.

   The listed assignments are imported into your Outlook Calendar or Tasks To-Do List.

Updating Assignments in Outlook

To record progress on a project assignment from Outlook, follow these steps:

1. Open the Outlook Calendar view or Tasks view.

   Which one you choose depends on whether you selected integration with Outlook Tasks or Outlook Calendar on the Project Web Access tab in the Options dialog.

2. Double-click the assignment for which you want to record progress.

   The appointment form appears, showing assignment details.

3. If you integrate with the Outlook Calendar, on the Project Web Access Appointment tab, in the Show group, click Project Web Access.

4. Depending on the tracking method configured for your project, enter the hours worked per time period, percentage complete, or actual work and remaining work (see Figure 23-22).

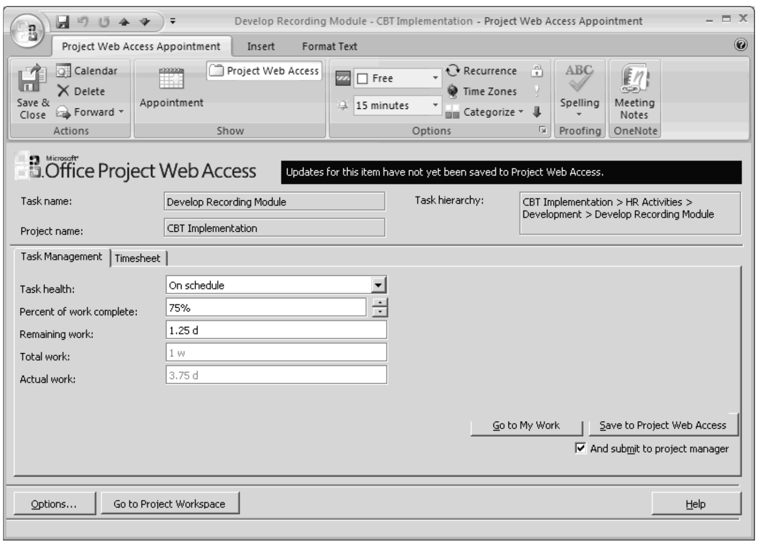


Figure 23-22 Enter progress information from within Outlook.

5. To save the updated information to your project server, click the Save To Project Web Access button.

   To also submit the information so that your project manager can see a progress update, select the And Submit To Project Manager check box.

Managing Resources in Project Web Access

If you're a resource manager supporting a project, you have additional capabilities available to you in Project Web Access. You can add to and edit the enterprise resource pool. You can build a project team based on skill sets. You can assign tasks to the right resources. You can review and approve task progress reports and timesheets.

For detailed information about the different resource management functions in Project Web Access and Project Professional 2007, refer to the appropriate section in Table 23-1.

Table 23-1 Resource Management References

Go to this section	In this chapter
"Creating the Enterprise Resource Pool"	Chapter 21
"Finding Resources to Meet Your Needs"	Chapter 22
"Finding Enterprise Resources that Meet Specific Criteria"	Chapter 22
"Assigning Tasks to Enterprise Resources"	Chapter 22
"Exchanging Task Progress Requests and Updates"	Chapter 22
"Requesting and Receiving Status Reports"	Chapter 22
"Tracking Billable and Nonbillable Time by Using Timesheets"	Chapter 22
"Creating a Resource Plan for a Proposal or Activity Plan"	Chapter 22
"Setting Up E-Mail Notifications and Reminders"	Chapter 22

Team leaders can also perform certain resource management functions, which include viewing resource assignments in assignment views, editing status report requests, and managing e-mail notifications and reminders.