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PRIMAVERA

Primavera Portfolio Management 8.0
Configuring Web Portlets
for Microsoft Project Server 2007

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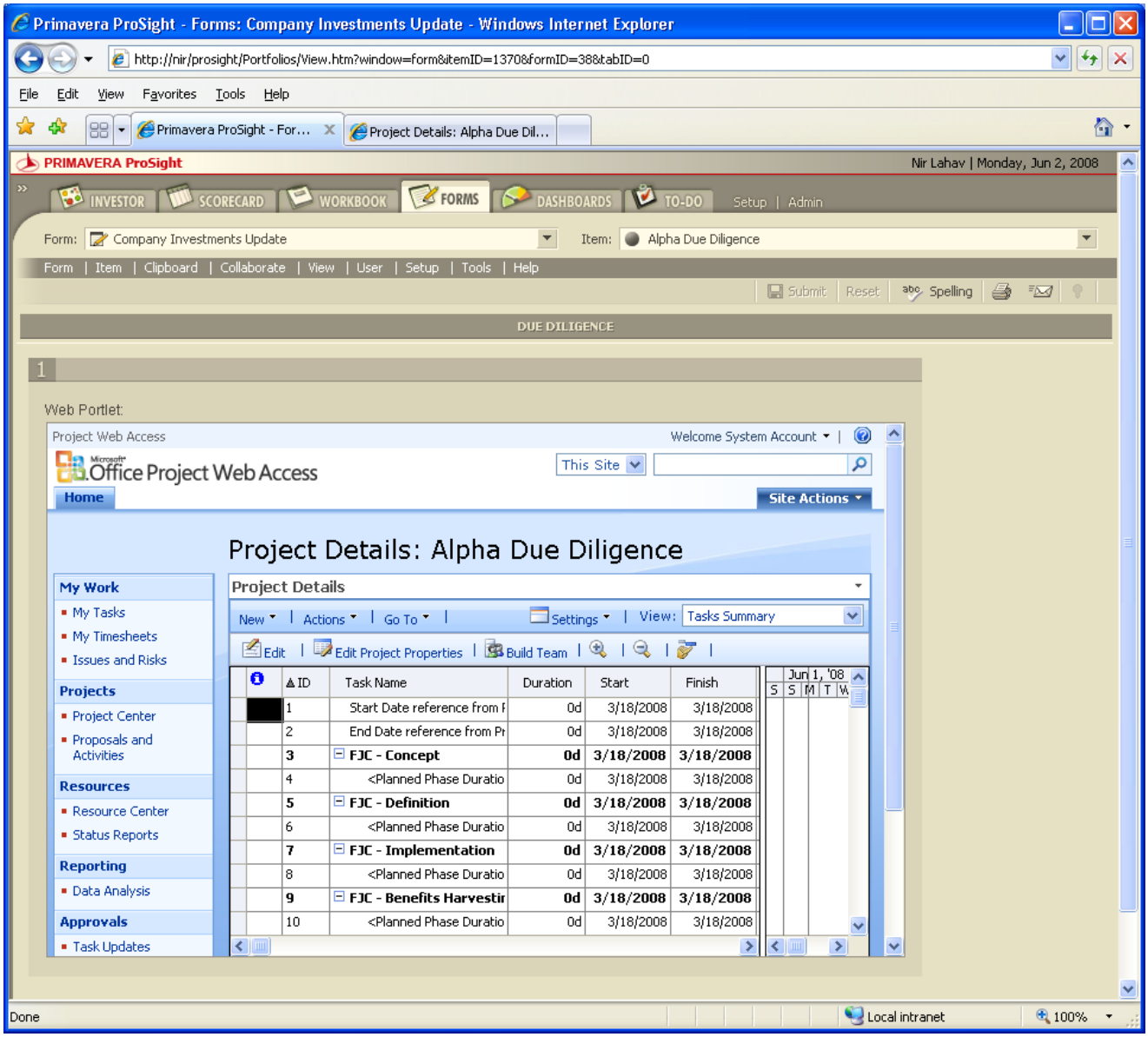
Configuring Web Portlets to display MS Project Server 2007 views

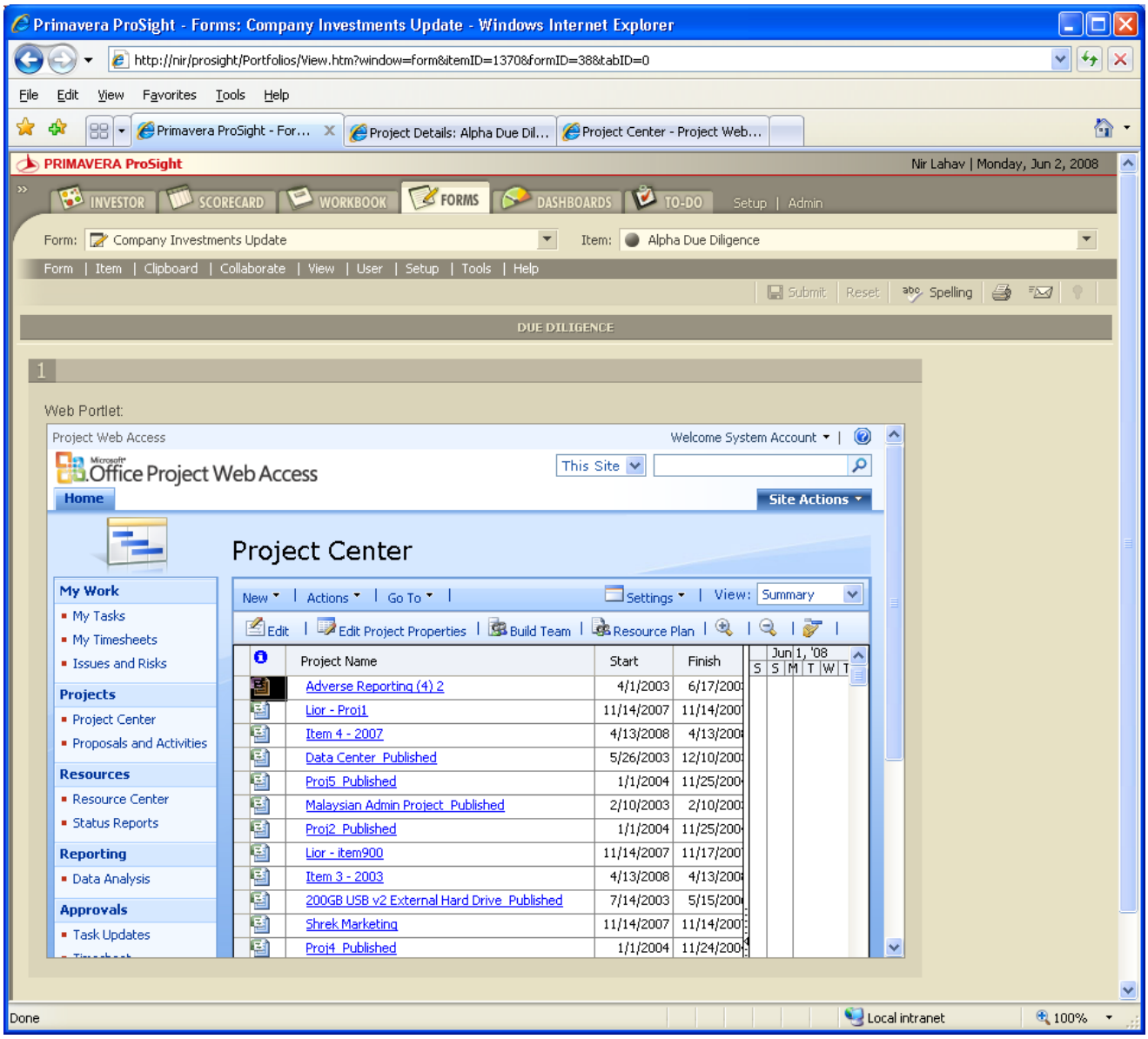
Overview

The Web Portlet can be set to display MS Project Web Access views. By adding different parameters in the URL, the form designer can control which type of view will be displayed, what will be the selected project and what toolbars and options will be displayed in the view.

In the following example the Web Portlet was set to display the schedule and resource information of the item by displaying the Project View from MS Project Web Access views. This MS Project view shows the tasks and summary tasks of the project together with field information and with a Gant chart:


Primavera ProSight - Forms: Company Investments Update - Windows Internet Explorer
http://nir/prosight/Portfolios/View.htm?window=form&itemID=13708&formID=38&tabID=0
File Edit View Favorites Tools Help
Primavera ProSight - For...
Project Details: Alpha Due Dil...
PRIMAVERA ProSight
Nir Lahav | Monday, Jun 2, 2008
INVESTOR
SCORECARD
WORKBOOK
FORMS
DASHBOARDS
TO-DO
Setup | Admin
Form: Company Investments Update
Item: Alpha Due Diligence
Form | Item | Clipboard | Collaborate | View | User | Setup | Tools | Help
Submit
Reset
Spelling
DUE DILIGENCE
1
Web Portlet:
Project Web Access
Welcome System Account
Office Project Web Access
This Site
Home
Site Actions
Project Details: Alpha Due Diligence
My Work
My Tasks
My Timesheets
Issues and Risks
Projects
Project Center
Proposals and Activities
Resources
Resource Center
Status Reports
Reporting
Data Analysis
Approvals
Task Updates
Project Details
New | Actions | Go To | Settings | View: Tasks Summary
Edit | Edit Project Properties | Build Team
ID
Task Name
Duration
Start
Finish
1 Start Date reference from F 0d 3/18/2008 3/18/2008
2 End Date reference from Pr 0d 3/18/2008 3/18/2008
3 FJC - Concept 0d 3/18/2008 3/18/2008
4 <Planned Phase Duratio 0d 3/18/2008 3/18/2008
5 FJC - Definition 0d 3/18/2008 3/18/2008
6 <Planned Phase Duratio 0d 3/18/2008 3/18/2008
7 FJC - Implementation 0d 3/18/2008 3/18/2008
8 <Planned Phase Duratio 0d 3/18/2008 3/18/2008
9 FJC - Benefits Harvestir 0d 3/18/2008 3/18/2008
10 <Planned Phase Duratio 0d 3/18/2008 3/18/2008
Jun 1, '08
Done
Local intranet
100%

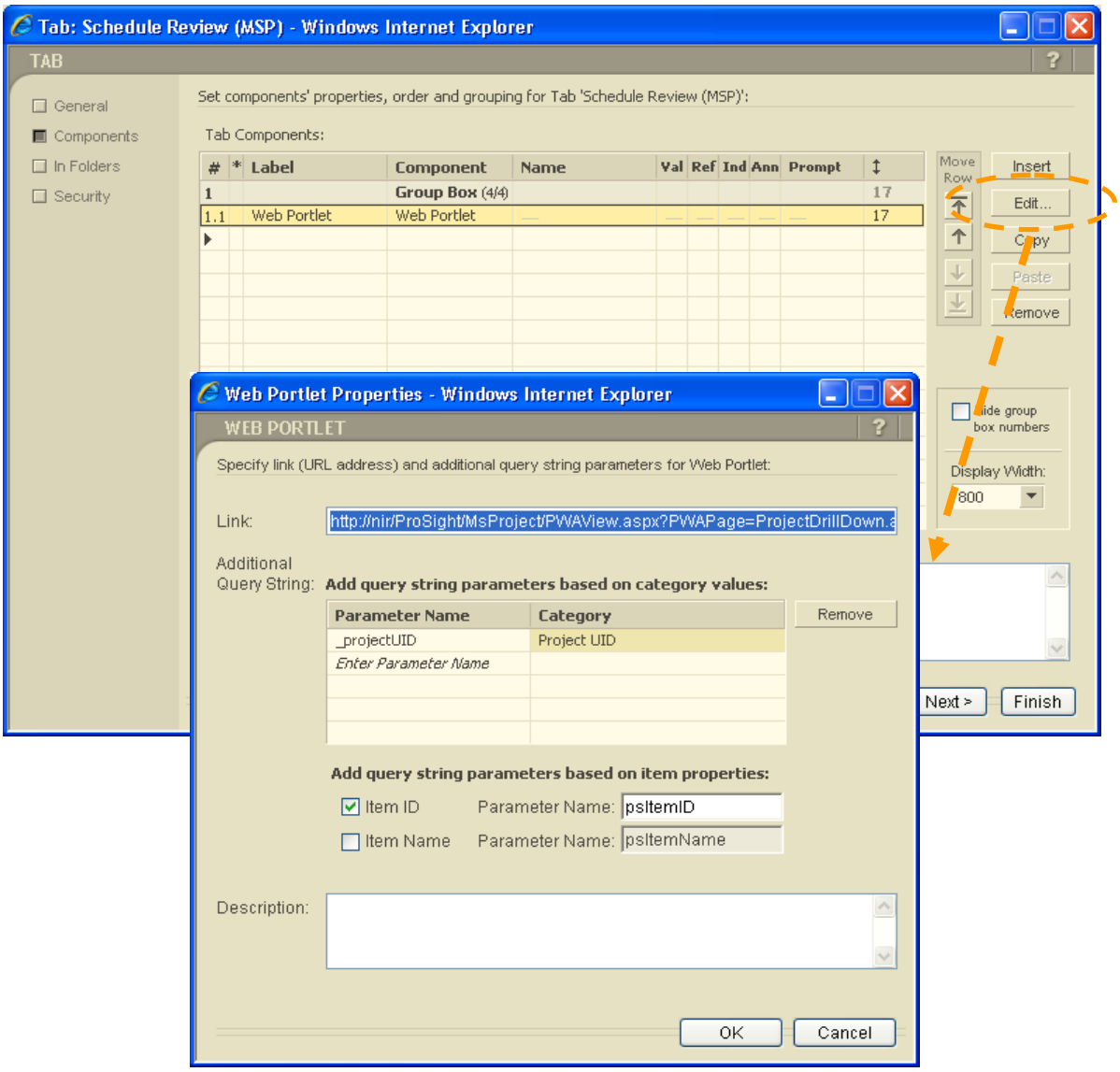
This example shows how the Web Portlet is set to display the inventory of projects in a project server by displaying the Project Center view:



Web Portlet Setup

1. Create a new Web Portlet component in the tab where you want to display MS Project Information (consult the online Help for details on how to do that). It is recommended to set the group box for that web Portlet at 4 quarters size (4/4) and to make sure the Web Portlet component height is enough to provide sufficient display area.

2. To set the Web Portlet to display information from a MS Project Server, open the properties window by clicking the properties button:



3. Enter the URL for the MS Project Web Access view in the 'Link' field and add query strings according to the preferred display mode. Each view type has a different URL, with query strings that also vary according to the preferred view mode and parameters (see details below).

   There are three supported Project Web Access modules that can be displayed within the Web Portlet:

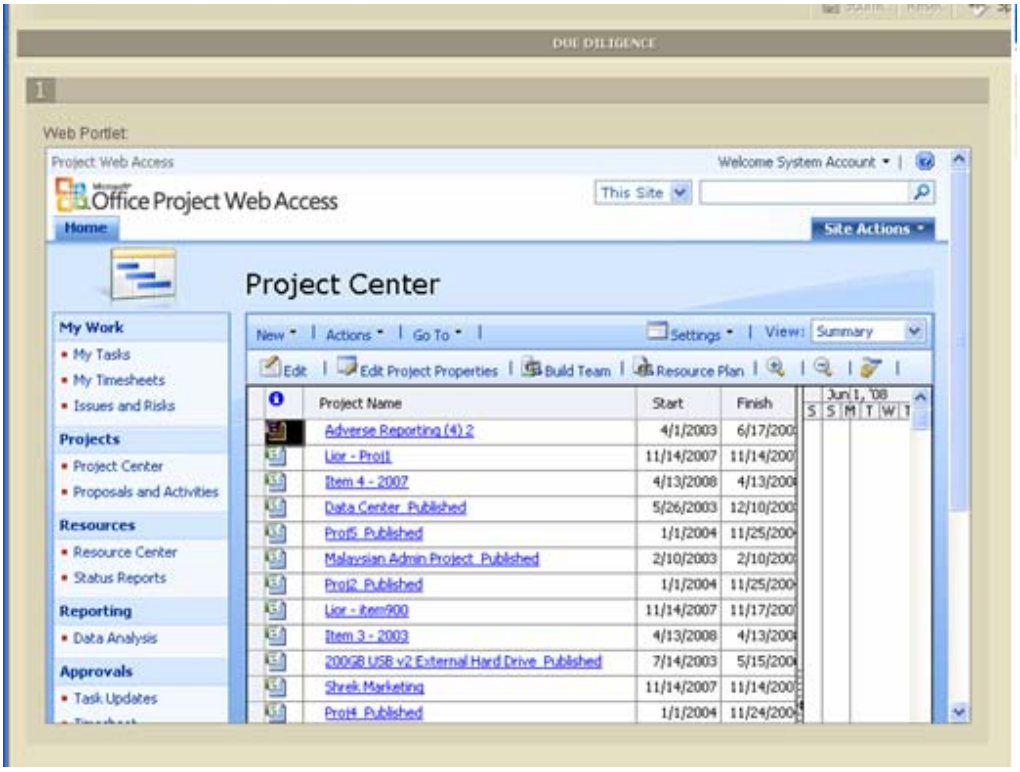
a. **'Project Center'**– lists all the projects in a MS Project Server with one of the available or custom made tables. Enter the following URL in the 'Link' field.

http://<Primavera Portfolio Management Server Name>/ProSight/MsProject/PWAView.aspx?
PWAPage=projects.aspx&
SimpleUI=<SimpleUI Value>&
ViewID=63d3499e-df27-401c-af58-ebb9607beae8&
WebPartID=<Web Part ID>

- Enter the above URL to get the Project Center module displayed in the Web Portlet.
- Change <Primavera Portfolio Management Server Name> to the name of your Primavera Portfolio Management server.
- Change <SimpleUI Value> to view the desired areas. Refer to the Using the SimpleUI Parameter section below for further details.
- Change <Web Part ID> to the correct web part ID as per your installation. Refer to the 'Obtaining the Web Part ID' section below for further details.
- You do not need to enter any details in the query string parameters based on category values table.
- Check the Item ID checkbox in the query string parameters based on item properties section and keep the default value given to the parameter name.
- You can change the values assigned to the query strings 'ViewID' to set different views to be displayed in the Project Center. See the list below for available options:

ViewID values:

ViewID Value	Selected View
63d3499e-df27-401c-af58-ebb9607beae8	Summary
fdac4ffa-c08b-478e-aa15-548840a85b76	Tracking
623b0154-38ea-4a19-a46a-0e1ac916b595	Cost
2943feb8-c75f-41cf-9dd1-2498ec4711aa	Earned Value
78e132a6-c534-456c-ab44-09ba3cbaa989	Work



b. **'Project View'** – Displays a table and usually a Gant chart for a selected project. It is basically the same view as you would get from the MS Project Professional client, but you can not directly update data in the fields. Enter the following URL in the 'Link' field:

http://<Primavera Portfolio Management Server Name>/ProSight/MsProject/PWAView.aspx?
PWAPage=ProjectDrillDown.aspx&
SimpleUI=<SimpleUI Value>&
ViewID= e1c71617-f168-42cd-b01c-7225cf813f7a
WebPartID=<Web Part ID>

- Enter the above URL to get the Project View module displayed in the Web Portlet.
- Change <Primavera Portfolio Management Server Name> to the name of your Primavera Portfolio Management server.
- Change <SimpleUI Value> to view the desired areas. Refer to the Using the SimpleUI Parameter section below for further details.
- Change <Web Part ID> to the correct web part ID as per your installation. Refer to the 'Obtaining the Web Part ID' section below for further details.
- To display project information related to the project currently selected in Primavera Portfolio Management you should add information in the 'Additional Query Strings' table:

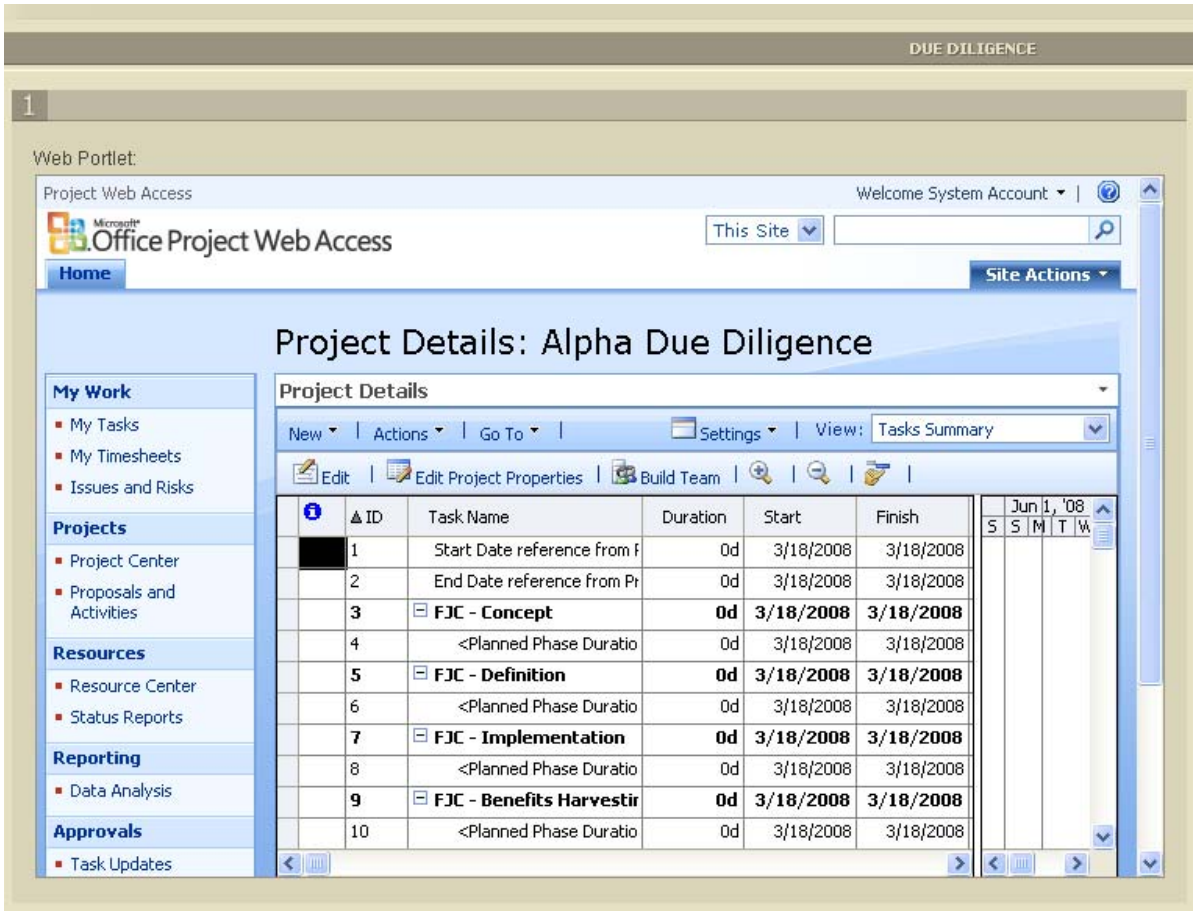
  - In the Parameter Name column Enter '_projectUID'
  - In the Category Name column select 'Project UID'.

  This information is used by the MS Project Server to identify the project and provide information in the Web Portlet that is only relevant to it.

- Check the Item ID checkbox in the query string parameters based on item properties section and keep the default value given to the parameter name.
- You can change the values assigned to the query strings 'ViewID' to set different views to be displayed in the Project View. See the list below for available options:

ViewID values:

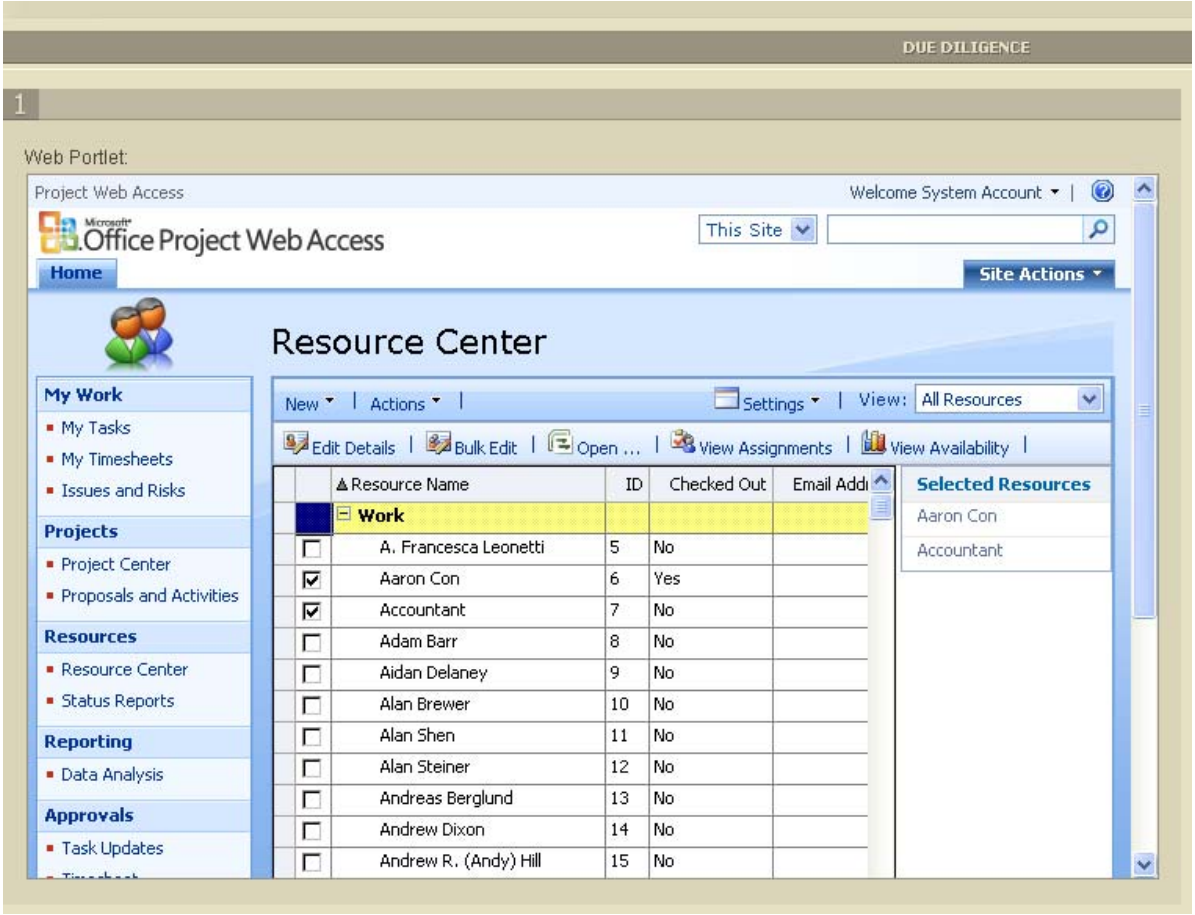
_viewID Value	Resulting Display
e1c71617-f168-42cd-b01c-7225cf813f7a	Tasks Summary
d77e53d6-067f-45ff-b17b-5e35e466cee4	Tasks Top-Level
e13da7be-341a-480e-ab98-5a1024125599	Tasks Detail
ca4e8b6b-fd01-42f5-b821-496caf60c49e	Tasks Leveling
354cc361-077a-49f3-8443-0b743d3176bb	Tasks Tracking
6961f540-f0b1-4391-9a09-3c5fce424774	Tasks Cost
64e612e6-ed94-4c2e-a8b2-cb898394b04f	Tasks Earned Value
4cce1d06-65cd-4a19-87ed-ffdae2f2dc5c	Tasks Schedule
40e2259e-0058-4e6b-a028-9abff2113db6	Tasks Work
4cd22a0f-aadf-48b2-81a0-c7d0acd50a77	Assignments Summary
adfbcd8c-aebe-49c8-bca3-a2a5a7784172	Assignments Detail
a9c35139-86d7-498c-bb0e-936f73610803	Assignments Tracking
fe68e1f5-bee5-42fb-aec5-968e3901f183	Assignments Cost
d90706bd-cf13-47ca-9477-c049a67b940f	Assignments Earned Value
1dd4df0d-6418-4296-a7c1-9ee109ace8fd	Assignments Work
02ba901d-587a-465d-9dac-bcd75f258453	Resources Summary
fc82afba-d477-4c47-acd5-ab5d82dfef41	Resources Cost
8a1dbe4c-4fb2-40d5-b266-df778e19f929	Resources Work
3d6bb647-801b-47f9-9029-7b8e33d206aa	Resources Earned Value



c. **'Resource Center'** – Listing all the enterprise resources available in a MS Project Server. Enter the following URL in the 'Link' field:

http://<Primavera Portfolio Management Server Name>/ProSight/MsProject/PWAView.aspx?
PWAPage=ResourcesRegisterView.asp&
SimpleUI=<SimpleUI Value>&
ViewID= 000010fc-7b06-45a9-9bd2-1cbfc2f64ce4
WebPartID=<Web Part ID>

- Change <Primavera Portfolio Management Server Name> to the name of your Primavera Portfolio Management server.
- Change <SimpleUI Value> to view the desired areas. Refer to the Using the SimpleUI Parameter section below for further details.
- Change <Web Part ID> to the correct web part ID as per your installation. Refer to the 'Obtaining the Web Part ID' section below for further details.
- You do not need to enter any details in the query string parameters based on category values table.
- Check the Item ID checkbox in the query string parameters based on item properties section and keep the default value given to the parameter name.



4. Enter a description for the URL in the description box. Currently this description will only be available in the Properties dialog box and in the form tab wizard, so the description will be used mostly for administration.

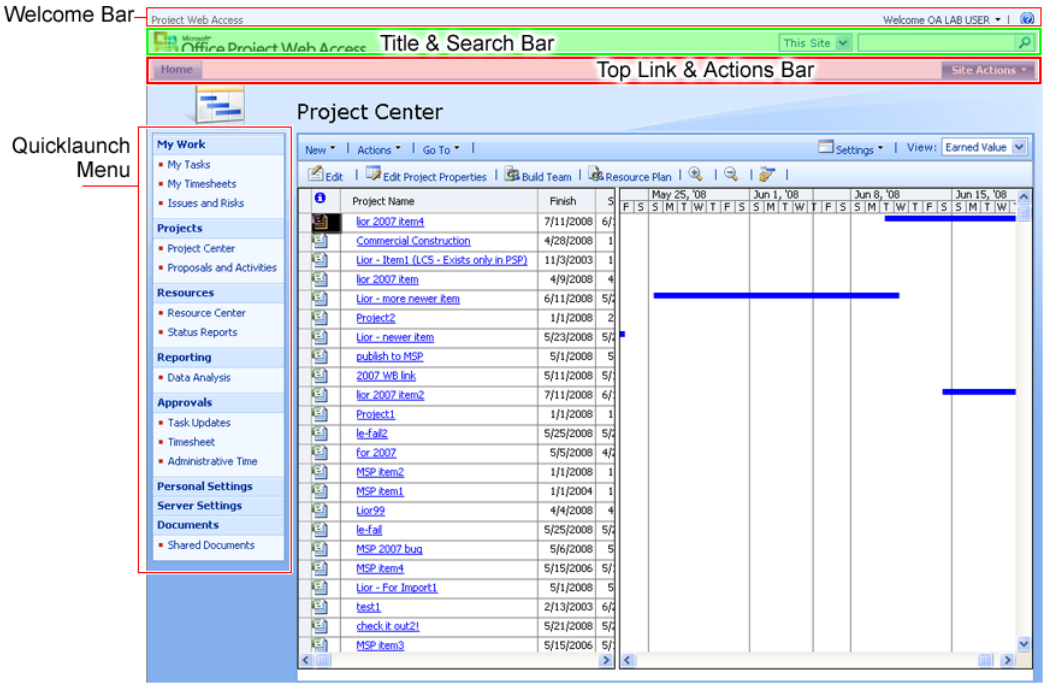
Note: In order to view the information in the 'Web Portlet', you must first publish it to the MS Project Server. Consult the online Help for details on how to do that.

Using the SimpleUI Parameter

The 'SimpleUI' is a Query-String parameter that is used by the Microsoft Project Server 2007 Web Access to determine which pieces of content will be displayed (for any of the three modules described above). You may use it to determine whether the Welcome Bar, the Title & Search Bar, the Top Link & Site Actions bar and the Quicklaunch menu will be displayed or not.
Use this option to remove unnecessary areas and reclaim screen real estate and get a bigger view of the modules and the data.
The following table lists all the available modes. Please refer to the illustration below for further details.

SimpleUI value	Welcome Bar	Title & Search Bar	Top Link & Site Actions bar	Quicklaunch menu
0	Yes	Yes	Yes	Yes
1	No	Yes	Yes	Yes
2	Yes	No	Yes	Yes
3	No	No	Yes	Yes
4	Yes	Yes	No	Yes
5	No	Yes	No	Yes
6	Yes	No	No	Yes
7	No	No	No	Yes
8	Yes	Yes	Yes	No
9	No	Yes	Yes	No
10	Yes	No	Yes	No
11	No	No	Yes	No
12	Yes	Yes	No	No
13	No	Yes	No	No
14	Yes	No	No	No
15	No	No	No	No

Note: If you turn off any of the four areas, the setting remains even when you navigate to a different page.

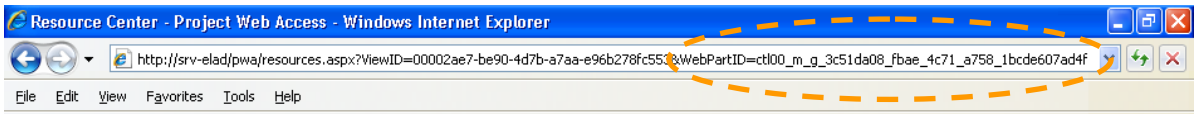


Obtaining the Web Part ID Parameter

The 'WebPartID' is a Query-String parameter that is used by the Microsoft Project Server 2007 Web Access. If you wish to use the 'ViewID' parameter, you must also supply the 'WebPartID' parameter. Note that each module has a different 'WebPartID' value and that this parameter also changes between installations.

To obtain this value follow these steps:

1. Open the Microsoft Project Server 2007 Web Access by typing the following address in your browser: 'http://<MSP 2007 Server>/pwa/'
2. Login to the server.
3. Project Center Module:
    a. Click the 'Project Center' link on the left-side menu
    b. Change the view
    c. Look in your browser's address bar for the 'WebPartID' parameter.
4. Project View:
    a. Click the 'Project Center' link on the left-side menu
    b. Click one of the projects in the list
    c. Change the view
    d. Look in your browser's address bar for the 'WebPartID' parameter.
5. Resource Center:
    a. Click the 'Project Center' link on the left-side menu
    b. Change the view
    c. Look in your browser's address bar for the 'WebPartID' parameter.



Using the Web Part ID Parameter

The ‘WebPartID’ parameter is used differently depending on the number of Microsoft Project 2007 Servers you have.
If you have a single Microsoft Project 2007 (you may have multiple Project Management servers installed but only one of them is Microsoft Project 2007), follow these steps:

1. Obtain the ‘WebPartID’ parameter as described above in the ‘Obtaining the Web Part ID’ section.
2. Use this value in the link field in the Web Portlet Parameters dialog as described above.

If you have multiple Microsoft Project 2007 servers, it is recommended that you create a different Web Portlet for each Microsoft Project 2007 server and use the different ‘WebPartID’ parameter in each one.