for SharePoint 2010

Download Templates Install Guide

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Published: May 2, 2013

BrightWork 2010

1 Introduction

BrightWork for SharePoint 2010 includes a number of templates that can be downloaded and manually added to BrightWork. This document describes the steps that must be taken to begin using these templates in a BrightWork for SharePoint 2010 Site Collection.

The templates that can be downloaded and manually added to a BrightWork site collection include:

- Project Request Manager

  The Project Request Manager template support requests for work and projects.
- Project Forecast Manager

  The Project Forecast Manager template offers a more involved process than the Project Request Tracker, supporting both requests for work and for projects.
- Work Manager

  The Work Manager template is for managing every day work. The Work Requests list includes a workflow that allows items created to be escalated to a Bug, Task, Issue; or Support Request.
- PM Basics PLUS Templates

  These BrightWork templates are based on the PM Basics course and processes from the International Institute for Learning. The templates integrates context-relevant links to the IIL PM Basics course (via an optional IIL course purchase).
- BrightWork Training Templates

  Updated training templates are generally available with every release of BrightWork. If you are Project Share Online customer, or an on premises customer that has deployed the TrainingZone site collection, you will want to delete the existing training templates in your site collection and replace them with the up-to-date ones.

  There are four training templates:
  - Training - Project Office
  - Training - Project Lite
  - Training - Project Standard
  - Training - Project Structured

2 Add Template to BrightWork Site Collection

This section describes how to add a BrightWork Template to a BrightWork Site Collection. This topic assumes you have a BrightWork Site Collection created.

Whilst adding the templates to a site collection should be done in a single session, it is useful to see it as a series of distinct high-level tasks that should be performed in the following sequence:

1. Obtain the Necessary Files
2. Add Icon Files to the SharePoint Server
3. Add Report Definition Files to the BrightWork Reporter Library
4. Add the WSP Files to Solution Gallery
5. Ensure all Site Collection Level Features are Enabled
6. Add the Solutions to the BrightWork Templates Area
7. Create Templates from these sites
8. Delete the solution sites from the Templates Area
9. Import Metrics

2.1 Obtain the Necessary Files

1. Download the appropriate zip file and unzip to a suitable location on your desktop.

   This zip will include a WSP and may also include:

   - Icons
   - Reports
   - Project Metrics.xml files

Note: If the zip you downloaded does not contain Icons, Reports or a Project Metrics.xml file, then skip the relevant sections of this install guide.

2.2 Add Icon Files to the SharePoint Server

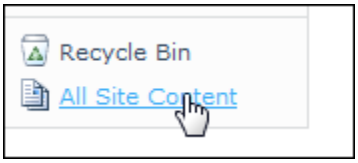
1. Copy the image files found in the Icons folder in the zip.
2. Login to the SharePoint server and paste the image files to the below location:

   <Drive>:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\TEMPLATE\IMAGES
3. Repeat for each web front end where appropriate.

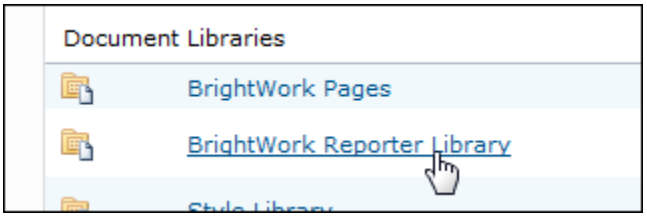
Note: This step only needs to be carried out once per relevant web front end.

2.3 Add Report Definition Files to BrightWork Reporter Library

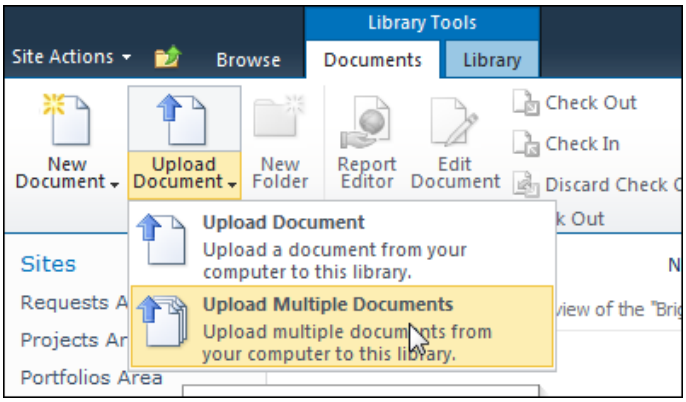
1. Login to the BrightWork site collection and click **All Site Content** on the site collection home page.



2. Click **BrightWork Reporter Library**.

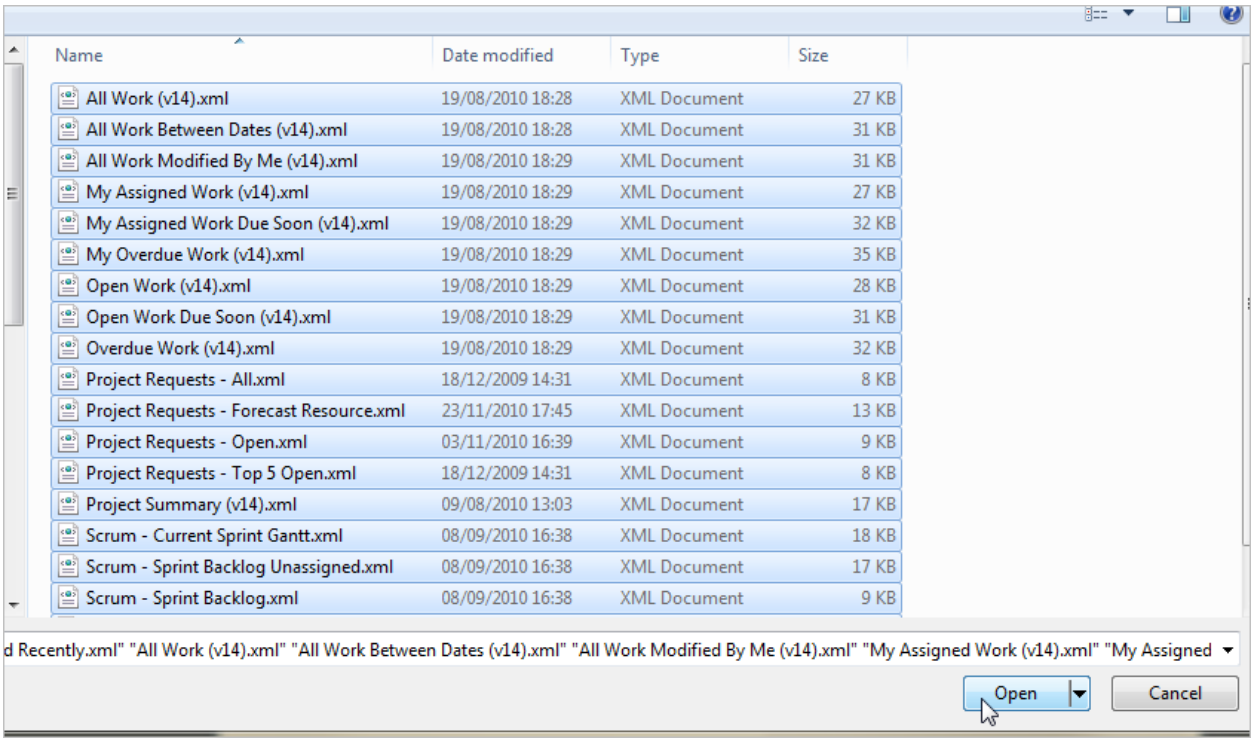


3. Click **Documents | Upload Document | Upload Multiple Documents**.

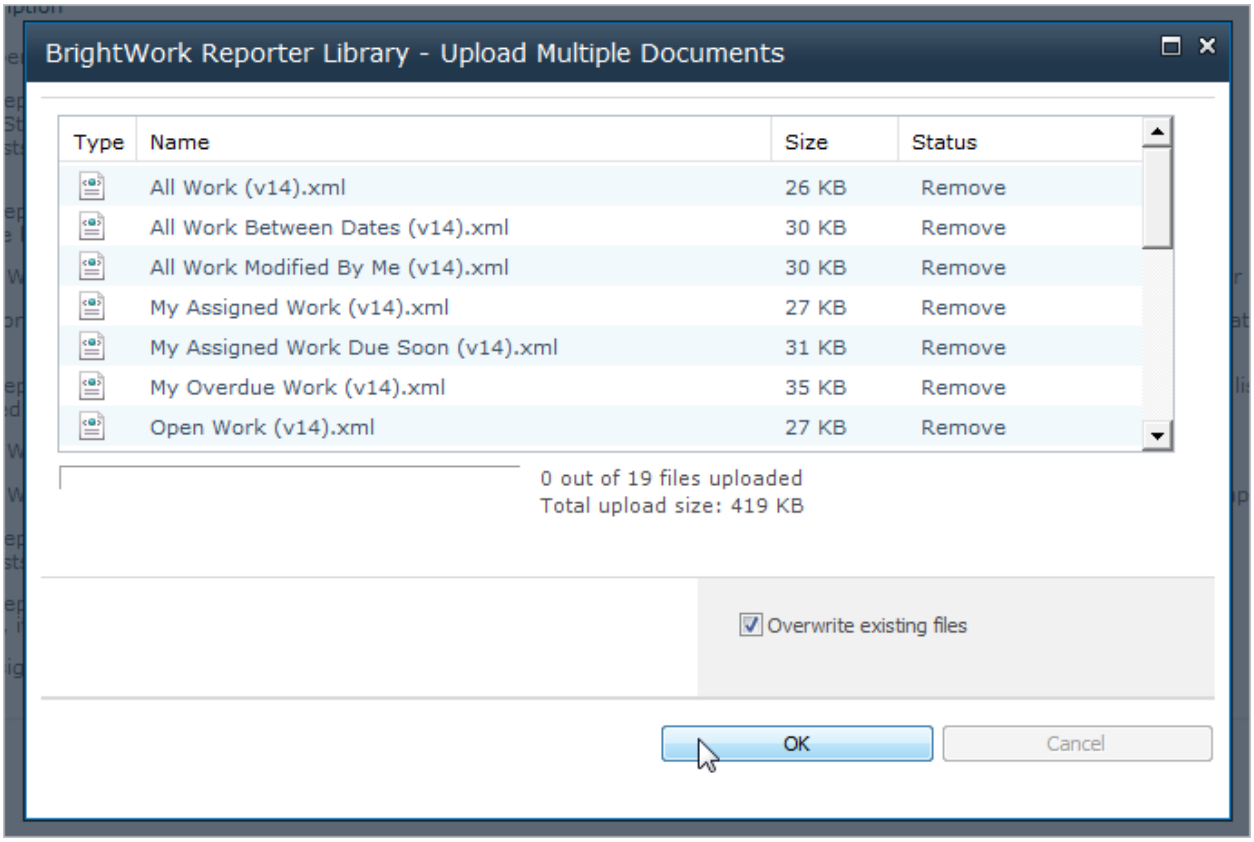


4. Click **Browse** and navigate to the location where you unzipped the files.
5. Click the **Reports** folder.

6. Select all the files and click **Open**.



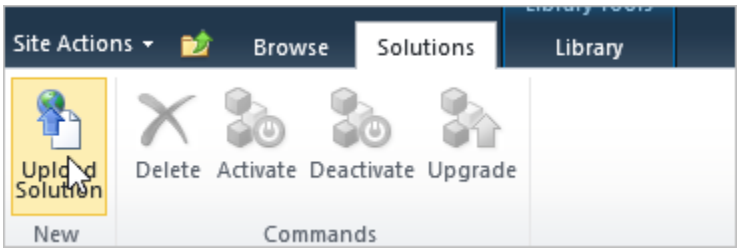
7. Click **OK**.



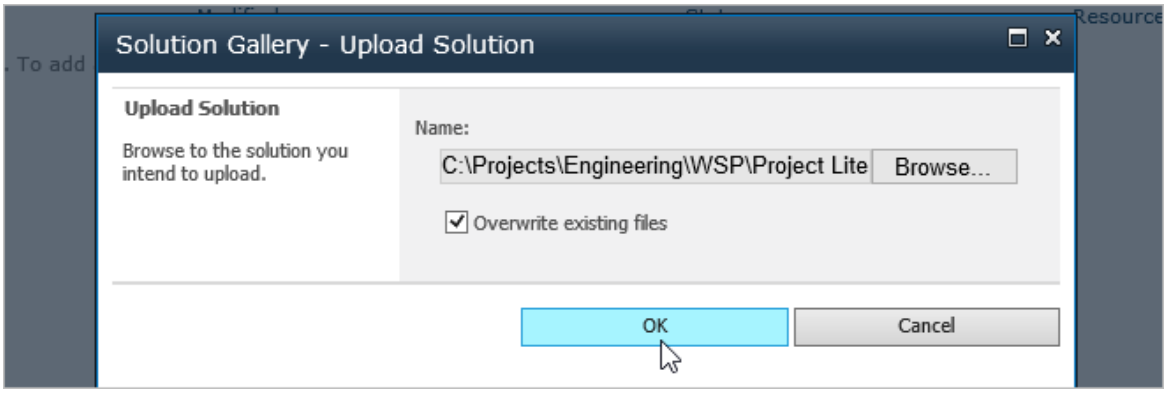
2.4 Add the WSP File to Solution Gallery

1. Click **Site Actions | Site Settings** on the BrightWork site collection home page.
2. Click **Solutions**.

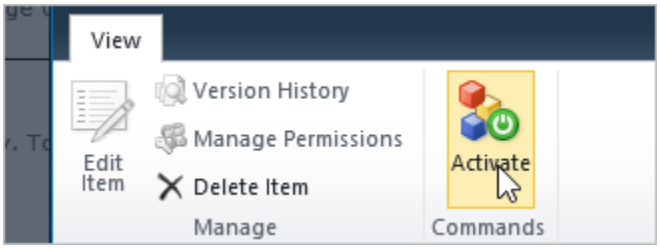
3. Click the **Solutions** tab.
4. Click **Upload Solution**.



5. Click **Browse** and navigate to the location where you unzipped the download file.
6. Select the wsp file and click **OK**.



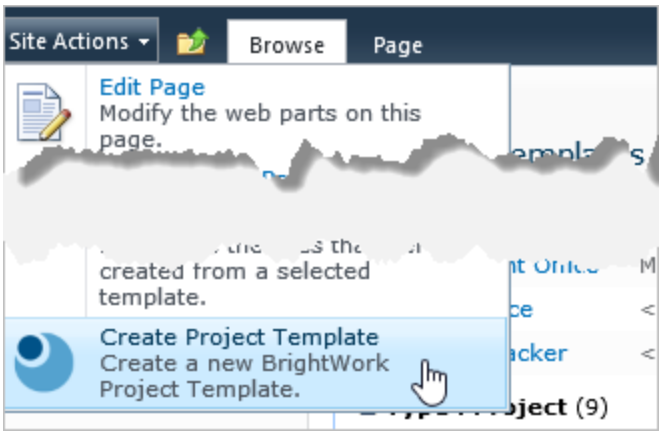
7. Click **Activate**.



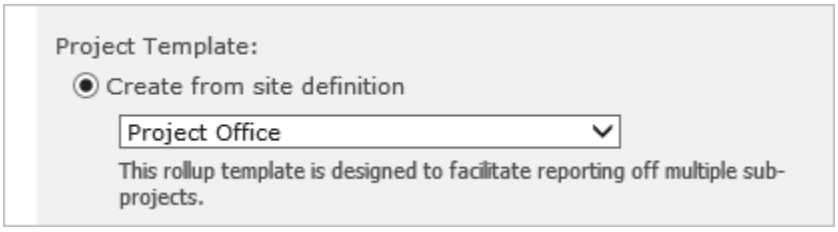
2.5 Ensure all Site Collection Level Features are Enabled

If there are no templates in the Templates Area, you need to ensure that all site collection features are enabled. The simplest way to achieve this is to create a project template from one of the out-of-the-box templates. The one we recommend starting with is the Projects Tracker.

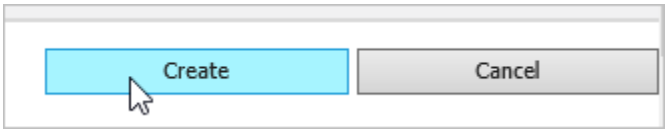
1. Click **Templates Area** on the top link bar.
2. Click **Site Actions | Create Project Template**.



3. Enter a Title and URL Name.
4. Select a template from the Create from site definition menu.

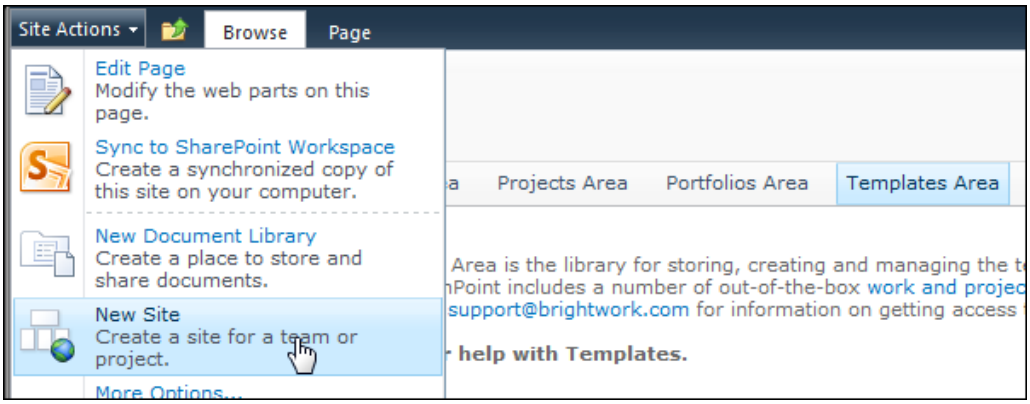


5. Click **Create**.

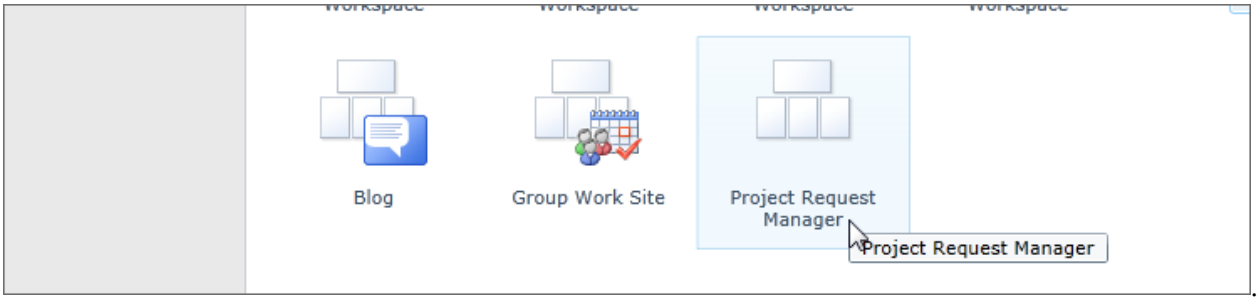


2.6 Add the Solution to the BrightWork Templates Area

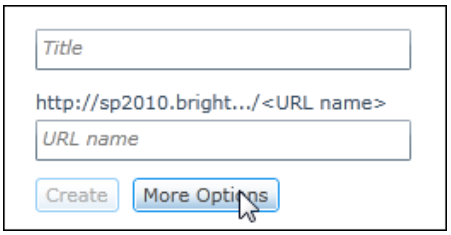
1. Click **Templates Area** on the top link bar.
2. Click **Site Actions | New Site**.



3. Select the wsp you added to the Solutions Gallery.



4. Click **More Options**.



5. Give the site a Title and a URL name, e.g. 'Project Request Manager DEL'.

Note: You will be deleting these sites after so use something like DEL in the site title to make it easy to identify.

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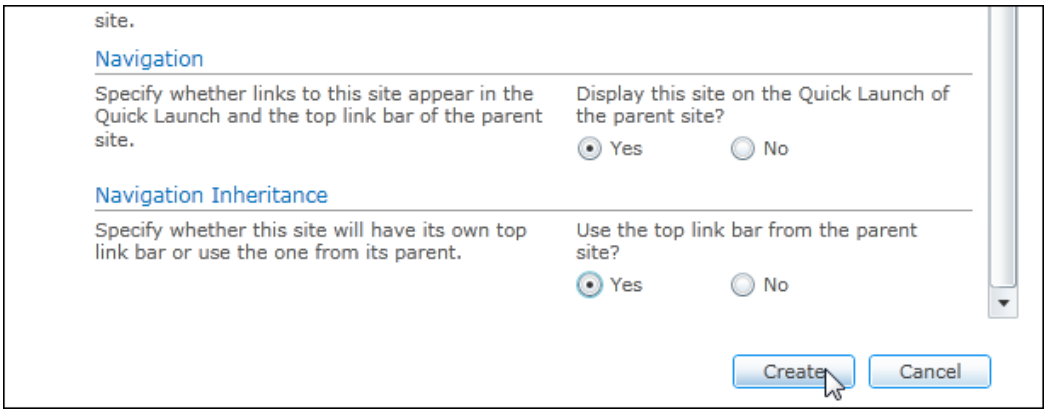
6. Select:
   - **Yes** under Display this site on the Quick Launch of the Parent Site?
   - **Yes** use the top link bar from the Parent Site

7. Click **Create**.



2.7 Create Template

Note: If you are adding updated training templates, you should delete the current Training templates first and use the names of these templates to create the new ones. If you are unsure how to delete a template, see the final section in this guide.

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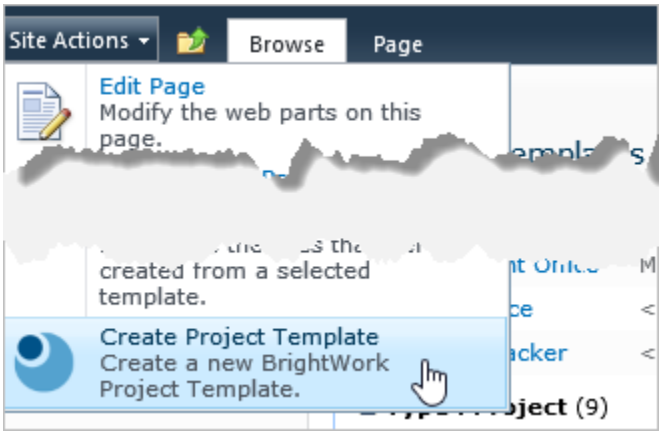
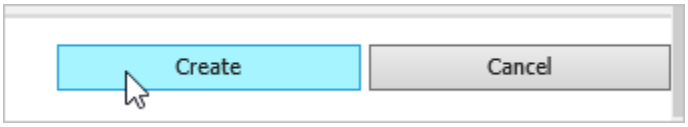
1. Click **Templates Area** on the top link bar.
2. Click **Site Actions | Create Project Template.**



3. Give the template a Title (e.g. Project Lite).
4. Select **Copy existing template** and click the browse button.

5. Click Return on your keyboard to display all the available templates.

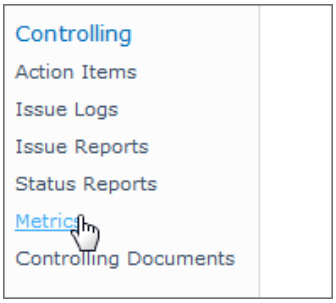
6. Select the site that you created in the previous section and click OK.
7. Click **Create**.



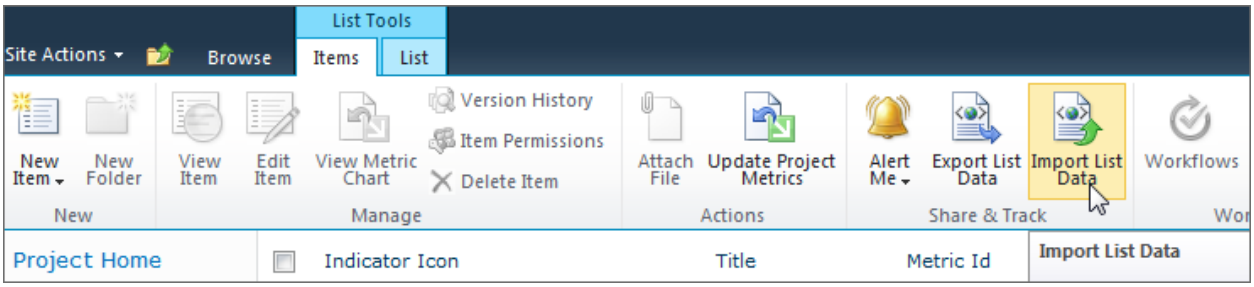
2.8 Import Metrics

If the downloaded template includes a Metrics list, the metric list items must be imported.

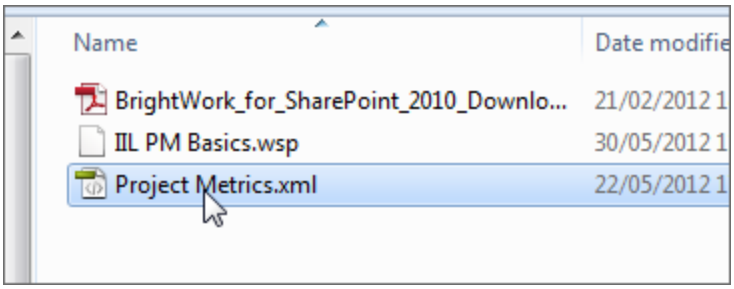
1. Click **Metrics** on the Quick Launch.



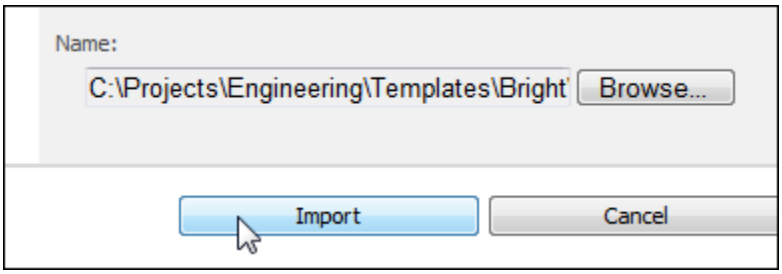
2. Click **Items | Import List Data**.



3. Click **Browse** and select the appropriate **Project Metrics.xml** file in the unzipped download folder.



4. Click **Import**.

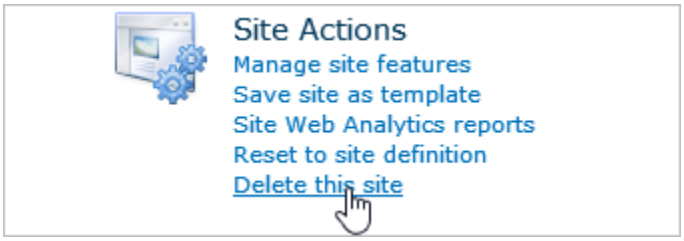


2.9 Delete Solution Site

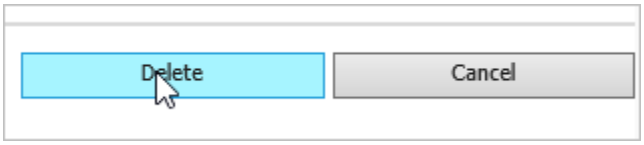
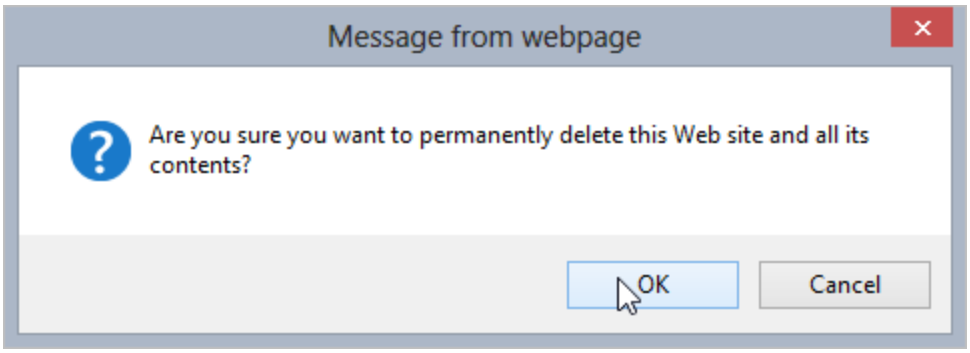
In this section, you will be deleting the site you created in *2.6 Add the Solution to the BrightWork Templates Area*. Whilst this step is optional, it is recommended to avoid any potential confusion.

1. Navigate to the home page of one of the sites you created from the solution gallery.
2. Click **Site Actions | Site Settings**.

3. Click Delete this site.



4. Click Delete.



5. Click OK to confirm the deletion.