BrightWork

for SharePoint 2010

Download Templates
Install Guide

Contents

1 Introduction

BrightWork for SharePoint 2010 includes a number of templates that must 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 must be downloaded and manually added to a BrightWork site collection include:

- Project Request Manager

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

- Project Forecast Manager

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

- Scrum Agile

  This template utilizes unique features in BrightWork to help provide a Scrum environment that includes Sprints, Stories, Tasks, Backlogs, Burndown charts, and all the Scrum features necessary to run a Scrum project.

- Work Manager

  The Work Manager template is for managing non-project work. The key-feature Work Requests list includes a workflow that allows any item created with this list to be escalated to a Bug, Task, Issue; or Support Request.

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

2.1   Obtain the Necessary Files

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

   This zip includes three folders:

   - Icons
   - Reports
   - WSPs

Note: If the zip you downloaded does not contain Icons or Reports, then you can skip these sections of the 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.
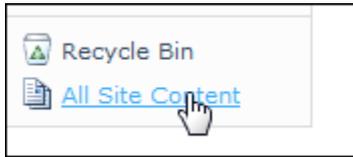

2. Click **BrightWork Reporter Library**.
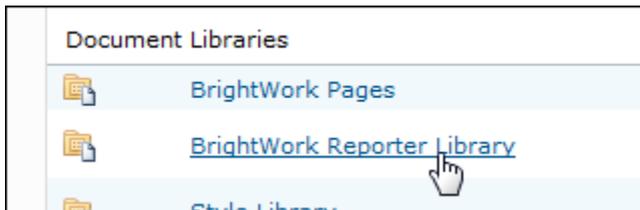
3. Click **Documents | Upload Document | Upload Multiple Documents**.
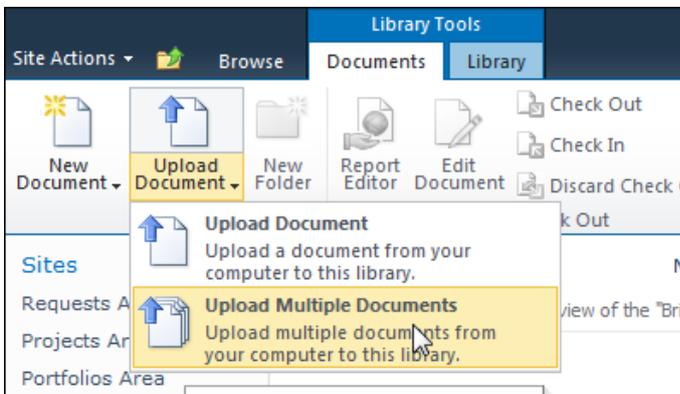
4. Click **Browse** and navigate to the location where you unzipped the files.

5. Click the **Reports** folder.

6. Select all the files and click **Open**.
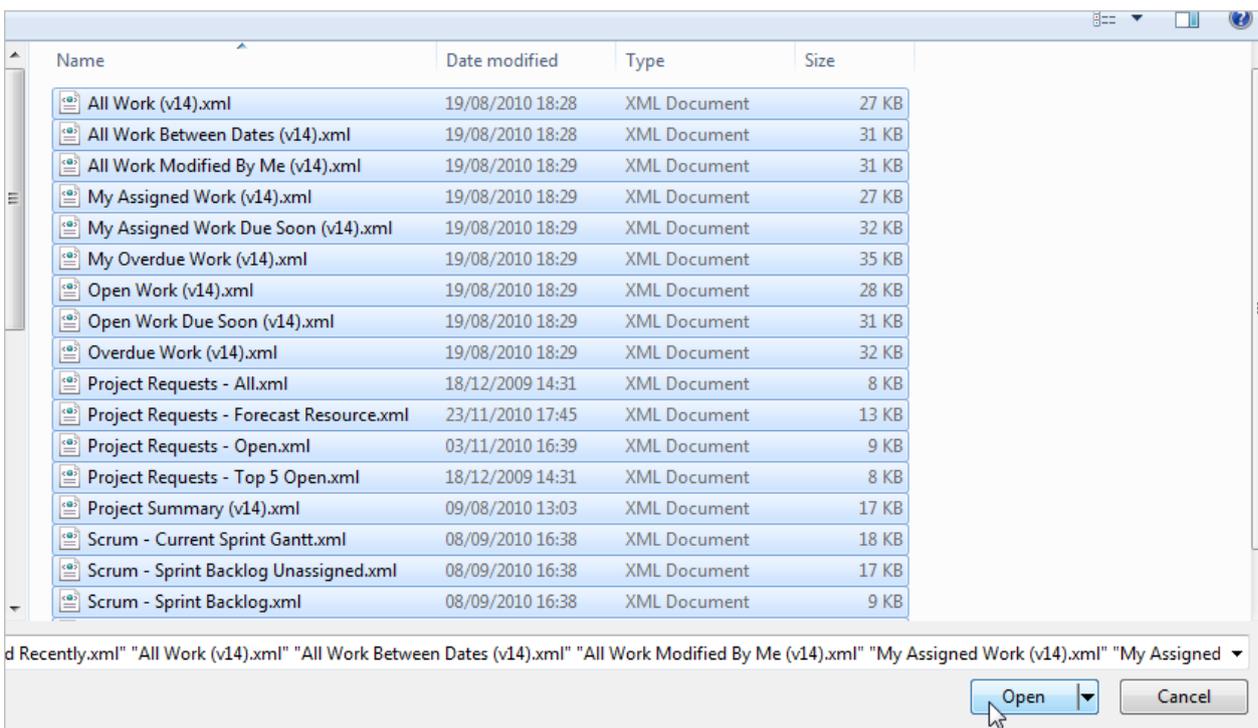
7. Click **OK**.
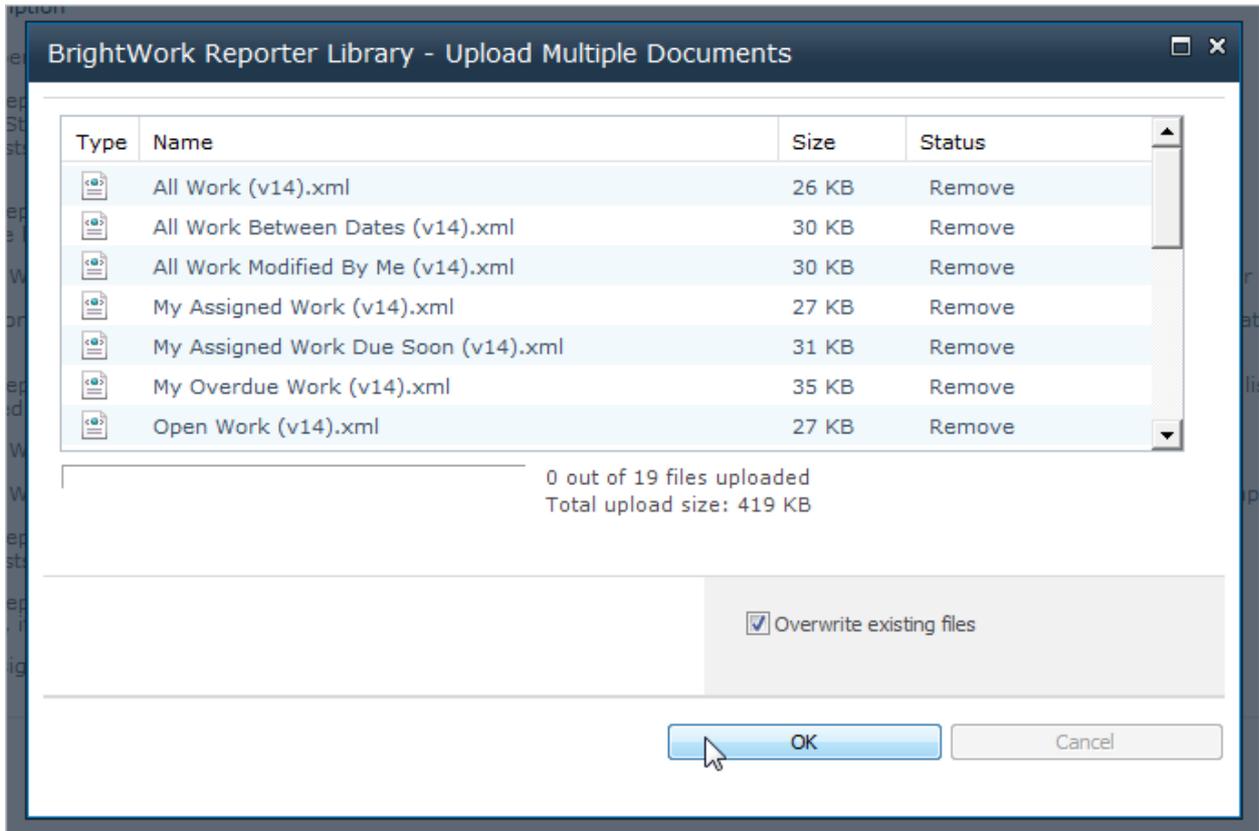
2.4   Add the WSP File to Solution Gallery

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

2. Click **Solutions**.
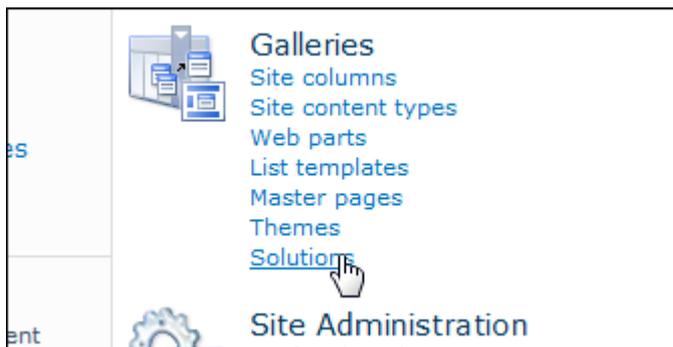
3. Click the **Solutions** tab.

4. Click **Upload Solution**.
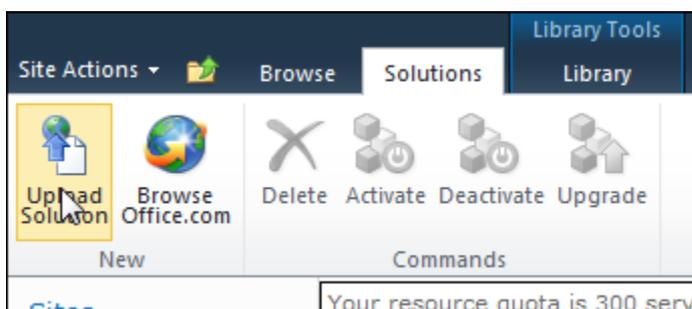
5. Click **Browse** and navigate to the location where you unzipped the download file.

6. Select the wsp file and click **OK**.
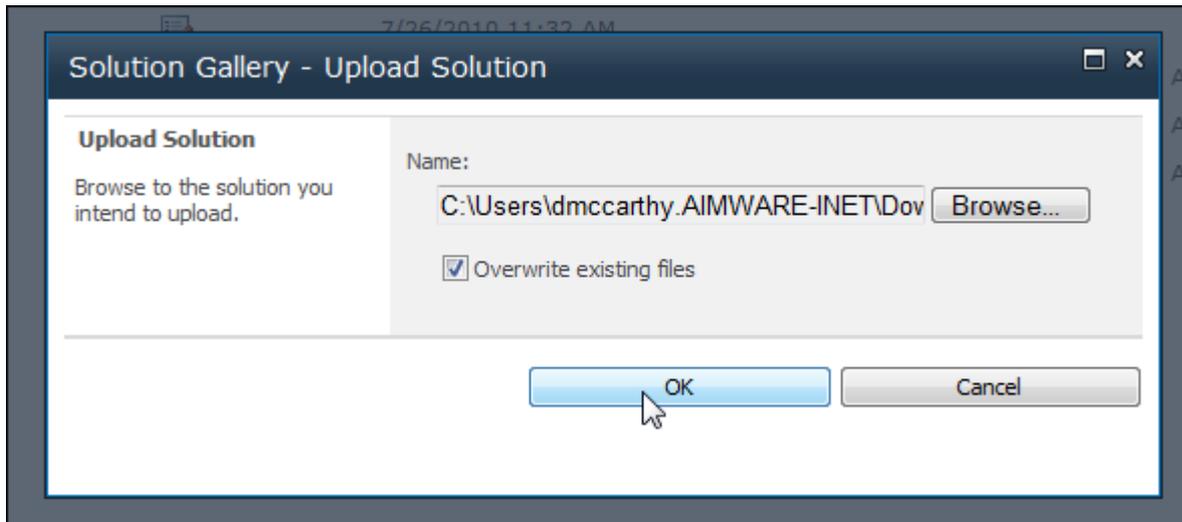

7. Click **Activate**.
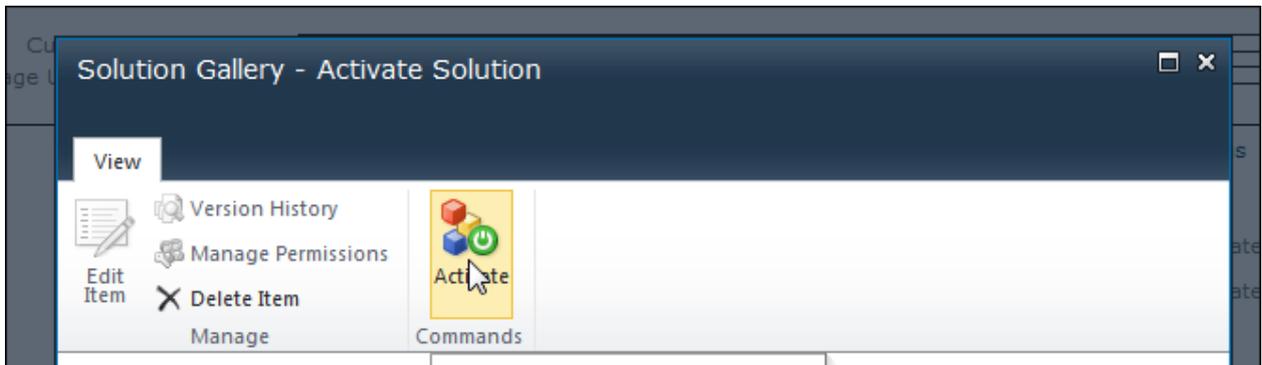
2.5 Ensure all Site Collection Level Features are Enabled

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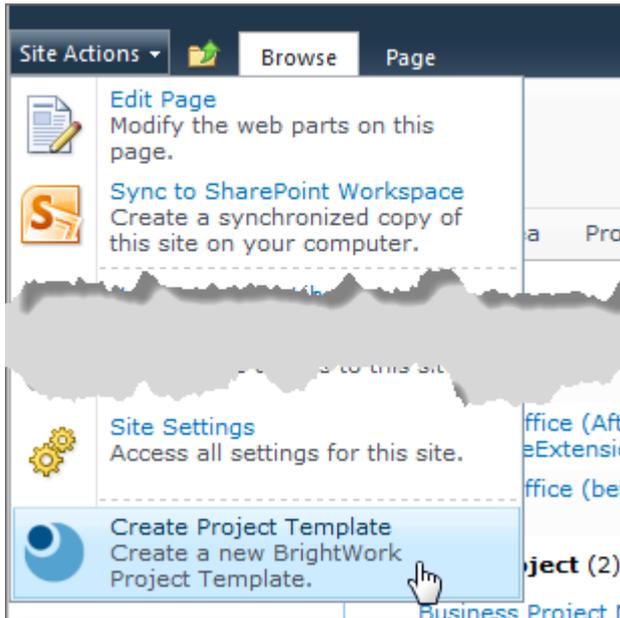
3. Enter a Title and URL Name.
4. Select a template from the Create from site definition menu.

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**.
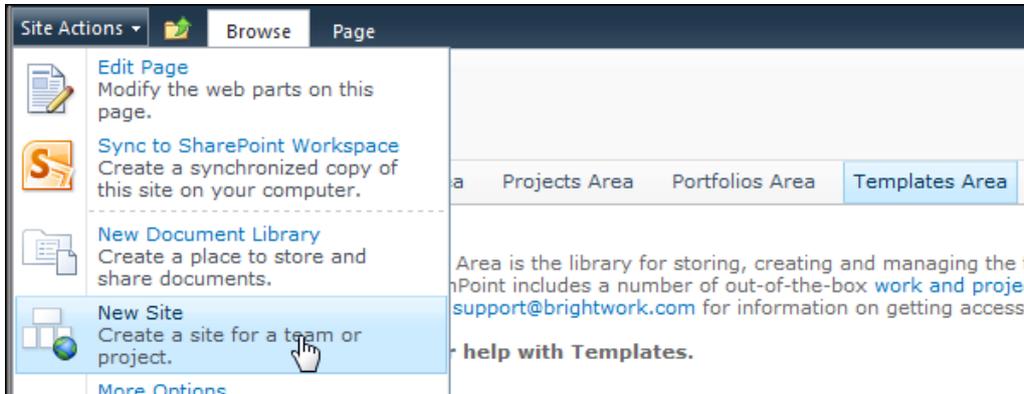
3. Select the wsp you added to the Solutions Gallery.
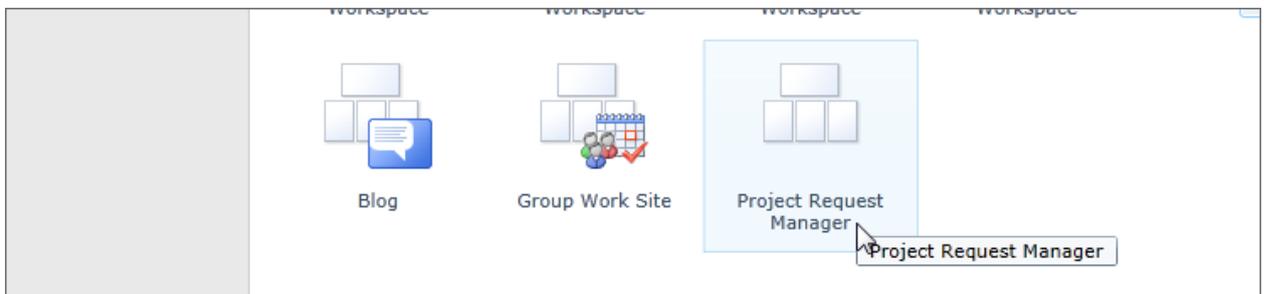
4. Click **More Options**.
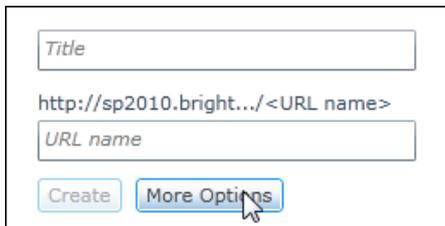
5. Give the site a Title and a URL name, e.g. 'Project Request Manager DEL'.

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

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**.
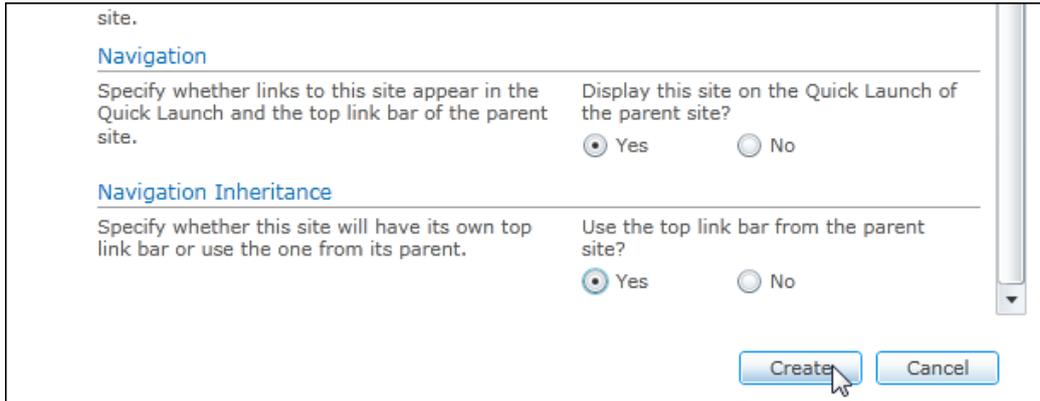
2.7 Create Templates

1. Click Templates Area on the top link bar.

2. Click **Site Actions | Create Project Template.**
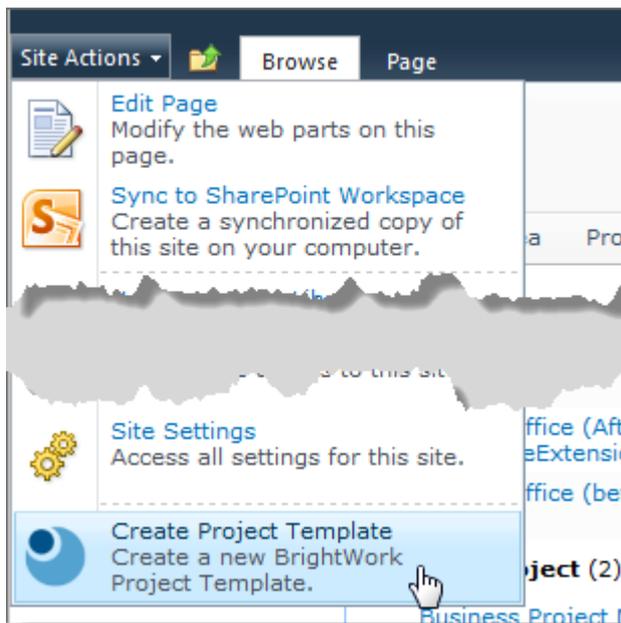
3. Give the template a Title and a URL name (e.g. Project Lite).

4. Select **Copy existing template** and click the browse button.
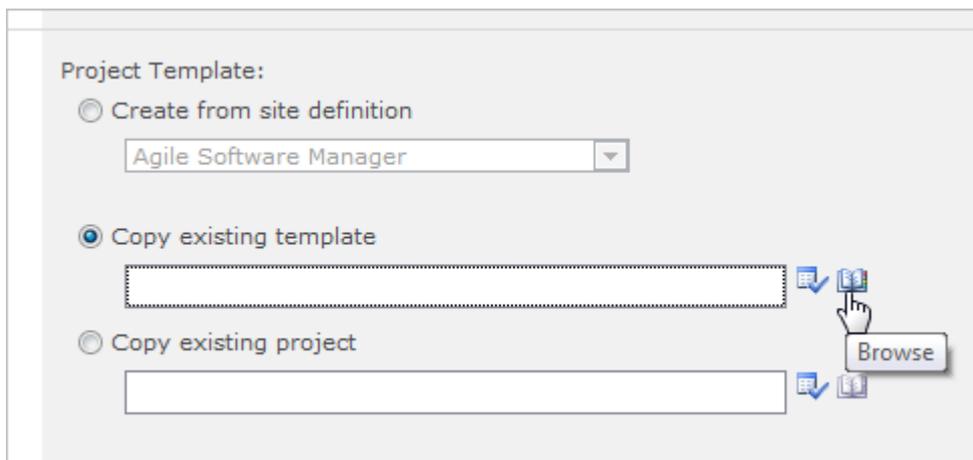
5. Click Return on your keyboard to display all the available templates.

6. Select the site that you created in the previous section and click OK.

7. Click **Create**.
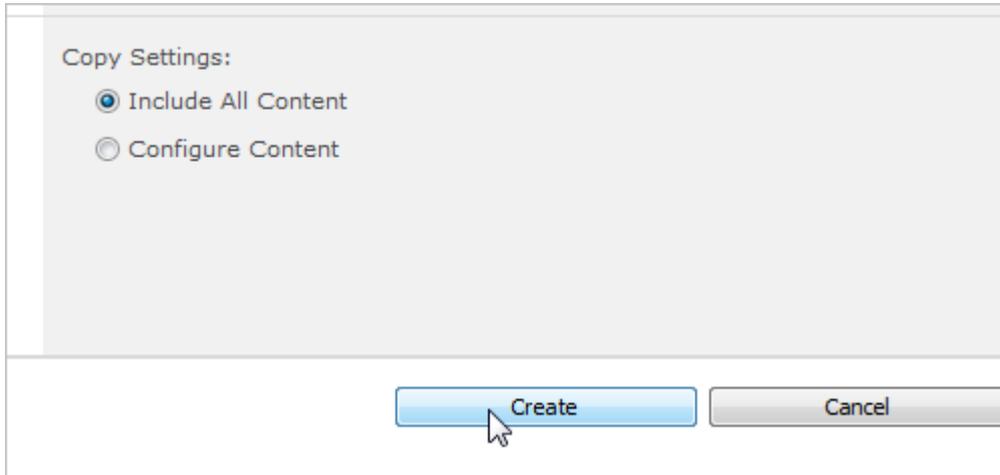
2.8   Delete Solution Site

In this section you will be deleting the site you created in *2.6 Add the Solutions 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.
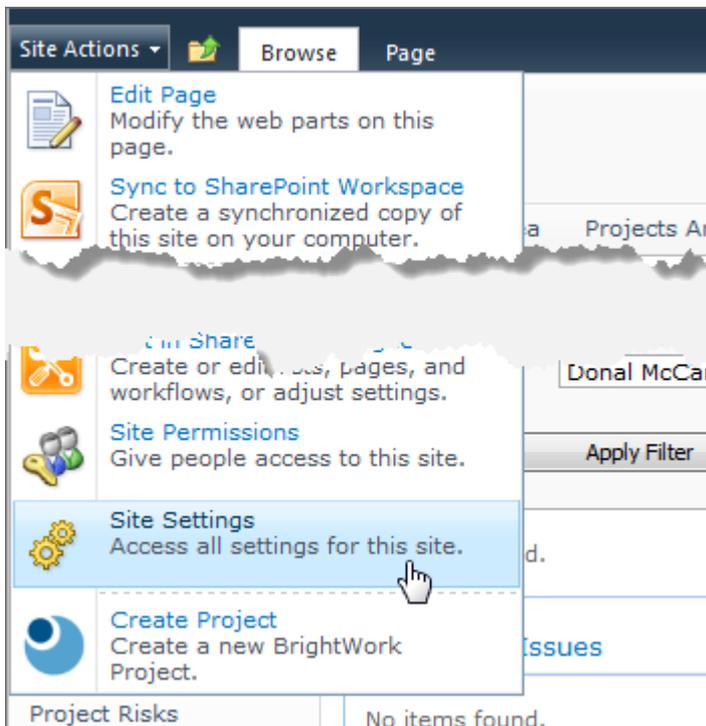
3. Click Delete this site.

4. Click Delete.
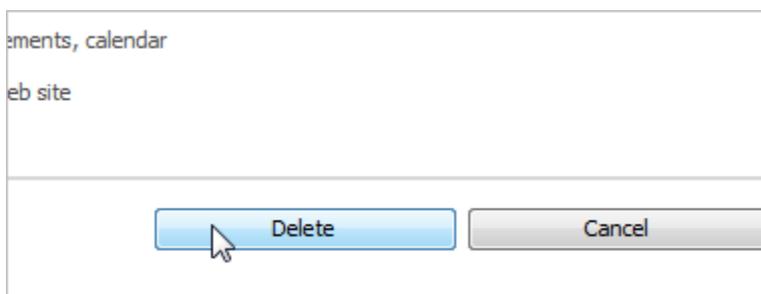
5. Click OK to confirm the deletion.