



for SharePoint 2013

Download Templates  
Install Guide



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BrightWork for SharePoint 2013

# 1 Introduction

BrightWork for SharePoint 2013 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 2013 Site Collection.

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

- Phase Gate

The Phase Gate template is for managing work with a phase gate methodology.

- Work Manager

The Work Manager template is designed to allow Team Members to manage their work quickly and easily.

- BrightWork Training Templates

Updated training templates are generally available with every release of BrightWork. If you are a 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.

While 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

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**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.

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## 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\15\TEMPLATE\IMAGES
3. Repeat for each web front end where appropriate.

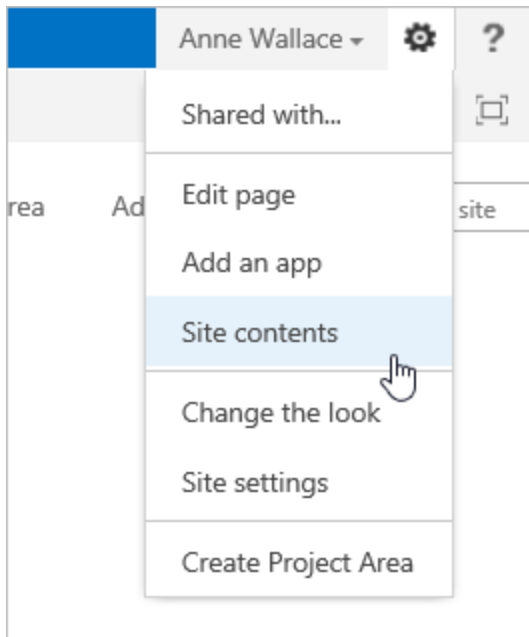
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**Note:** This step only needs to be carried out once per relevant web front end.

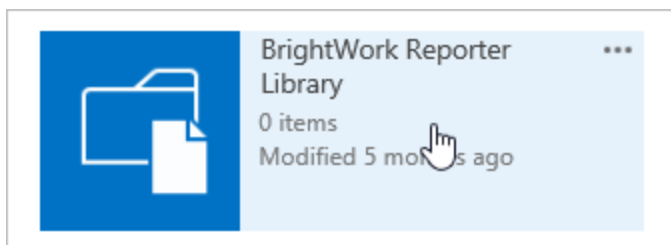
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## 2.3 Add Report Definition Files to BrightWork Reporter Library

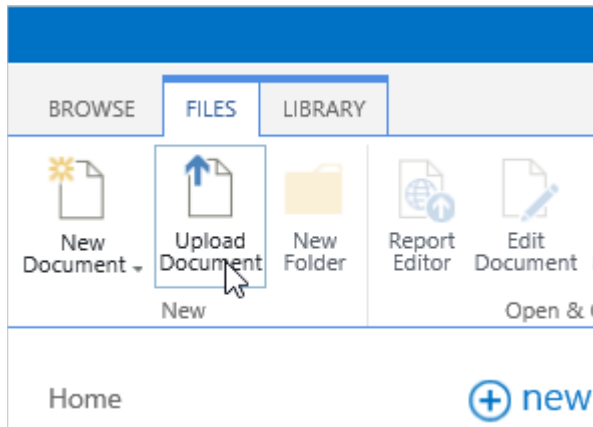
1. Login to the BrightWork site collection and click **Settings** ⚙️ | **Site Contents** on the site collection home page.



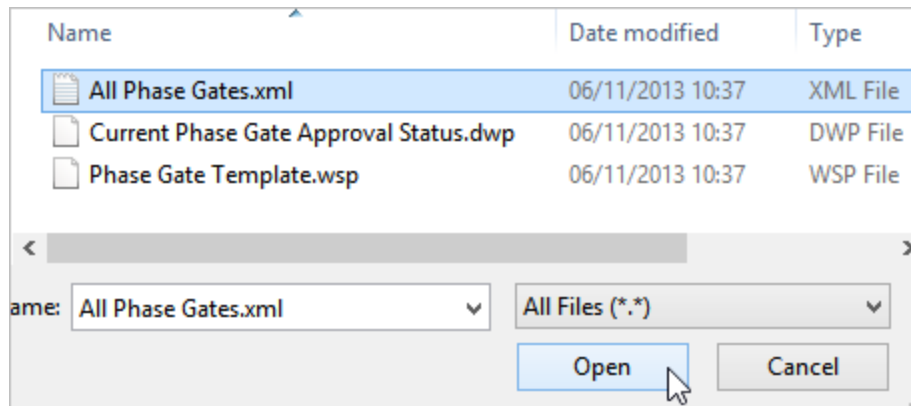
2. Click **BrightWork Reporter Library**.



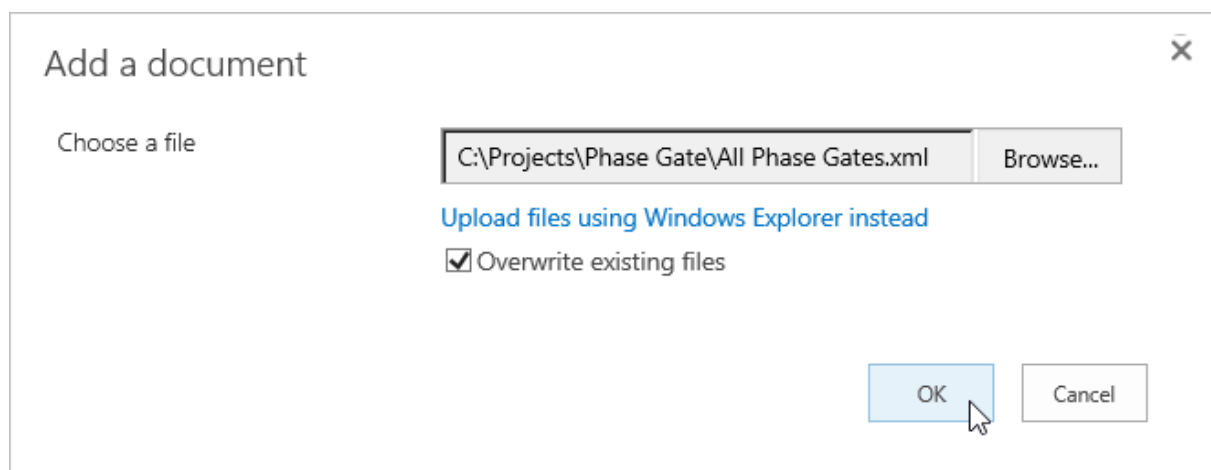
- Click **Files | Upload Document**.



- Click **Browse** and navigate to the location where you unzipped the files.
- Select the report XML files and click **Open**.



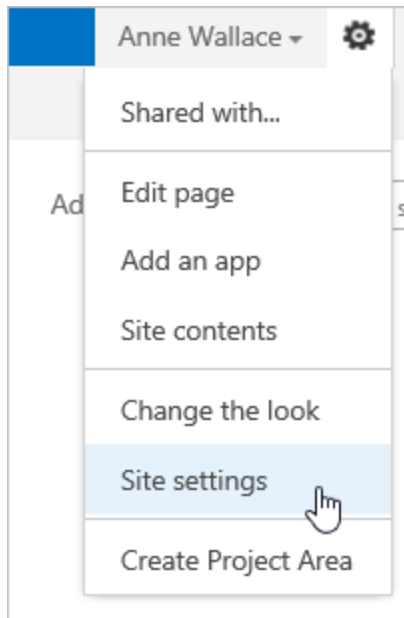
- Click **OK**.



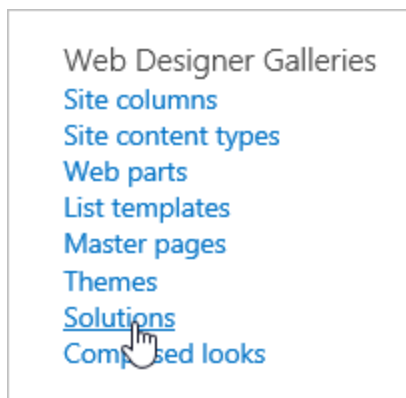
- Click **Save**.

## 2.4 Add the WSP File to Solution Gallery

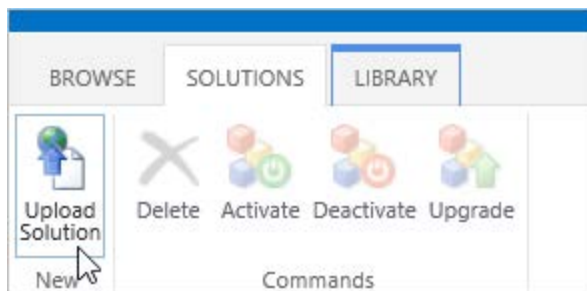
1. Click **Settings** ⚙️ | **Site Settings** on the BrightWork site collection home page.



2. Click **Solutions**.



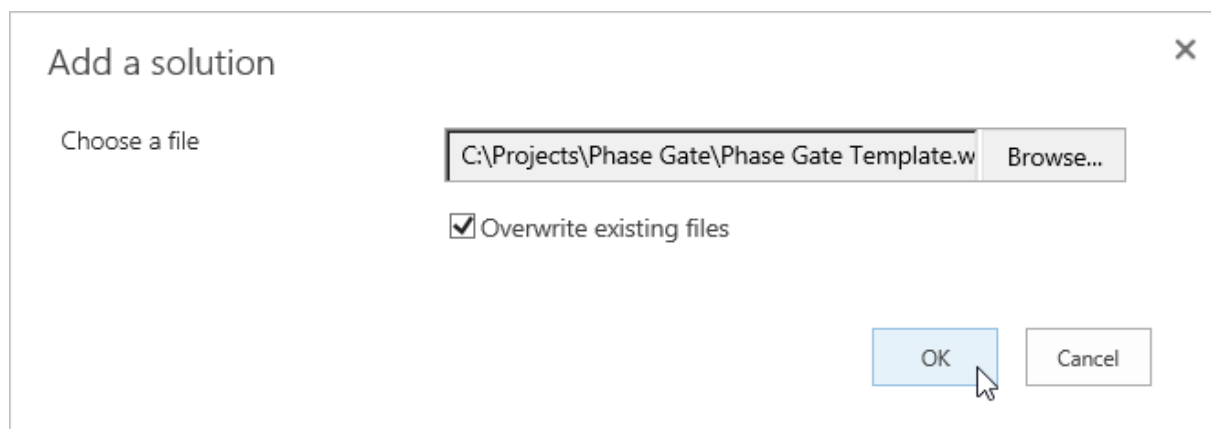
3. Click **Upload Solution**.



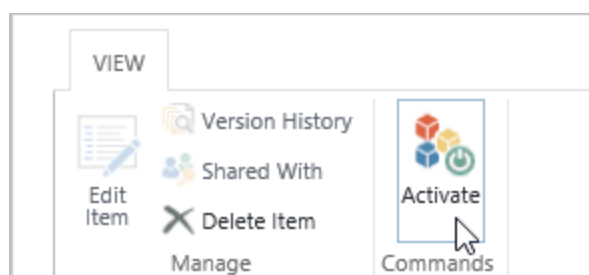
4. Click **Browse** and navigate to the location where you unzipped the download file.



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



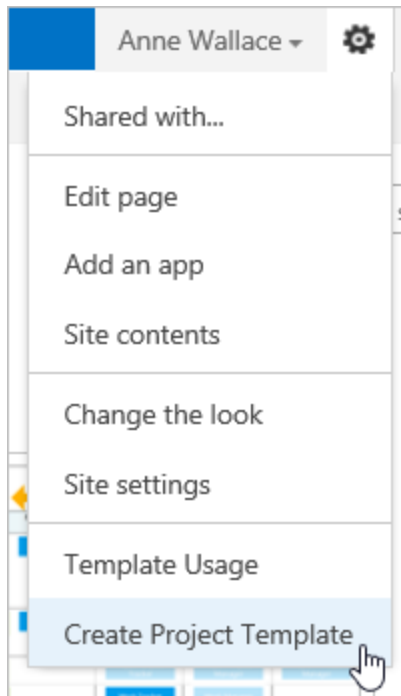
6. Click **Activate**.



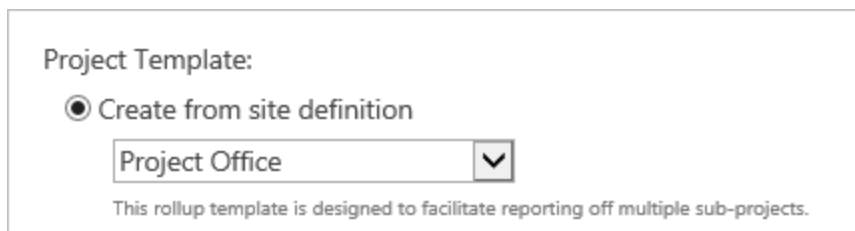
## 2.5 Ensure all Site Collection Level Features are Enabled

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.

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



3. Enter a Title, the URL will automatically populate.
4. Select a template from the Create from site definition menu.

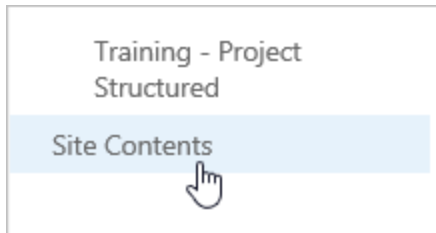


5. Click **Create**.

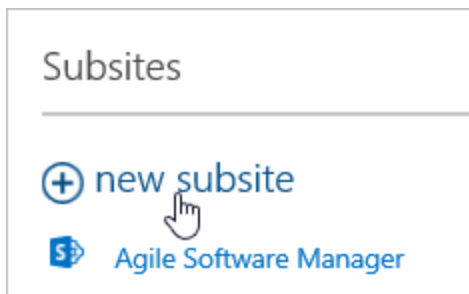


## 2.6 Add the Solution to the BrightWork Templates Area

1. Click **Templates Area** on the top link bar.
2. Click **Site Contents**



3. Click **new subsite**.



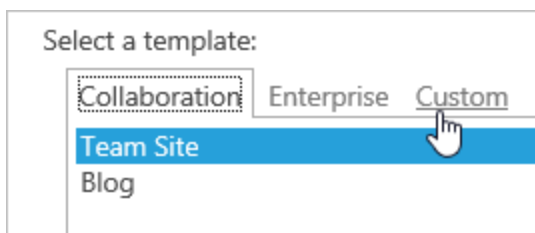
4. Give the site a Title and a URL name, e.g. 'Phase Gate Template DEL'.

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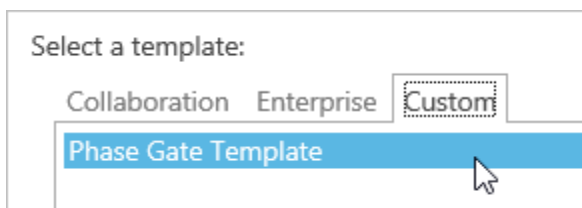
**Note:** You will be deleting these sites after so use something like DEL in the site title to make it easy to identify.

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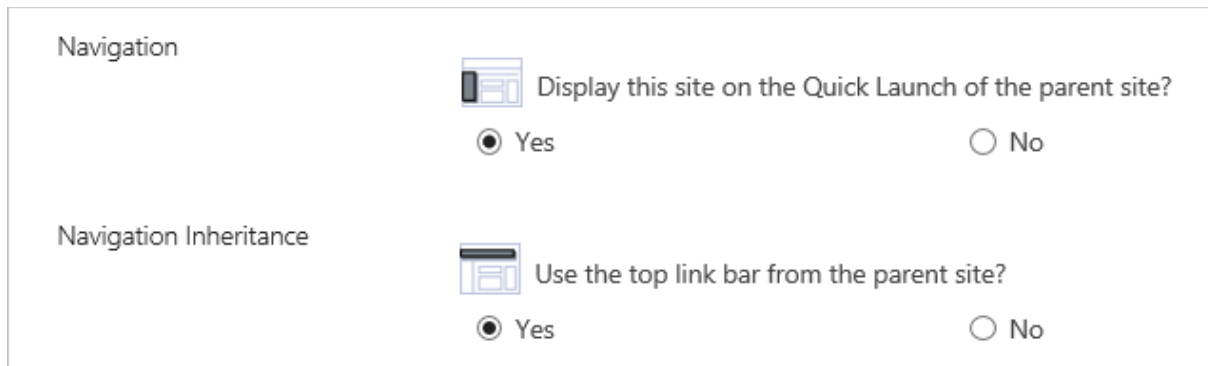
5. Click **Custom** in the Select a template area.



6. Select the wsp file you uploaded earlier.



7. Select **Yes** in the **Navigation** and **Navigation Inheritance** options.



The screenshot shows two sections: 'Navigation' and 'Navigation Inheritance'. Each section has a question with a 'Yes' or 'No' radio button option. In the 'Navigation' section, the question is 'Display this site on the Quick Launch of the parent site?' and the 'Yes' option is selected. In the 'Navigation Inheritance' section, the question is 'Use the top link bar from the parent site?' and the 'Yes' option is selected.

Section	Question	Yes	No
Navigation	Display this site on the Quick Launch of the parent site?	<input checked="" type="radio"/>	<input type="radio"/>
Navigation Inheritance	Use the top link bar from the parent site?	<input checked="" type="radio"/>	<input type="radio"/>

8. Click **Create**.

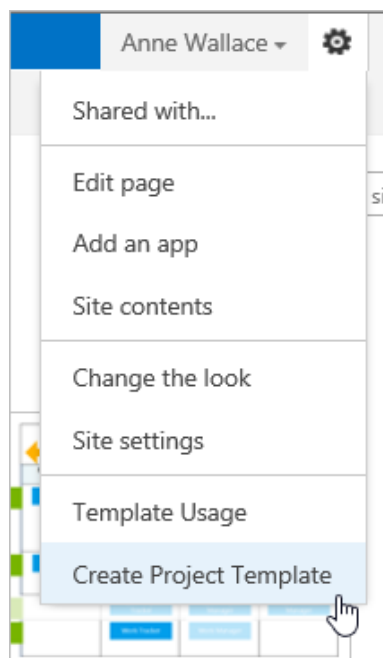


The screenshot shows two buttons: 'Create' and 'Cancel'. The 'Create' button is highlighted with a mouse cursor pointing at it.

## 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.

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



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




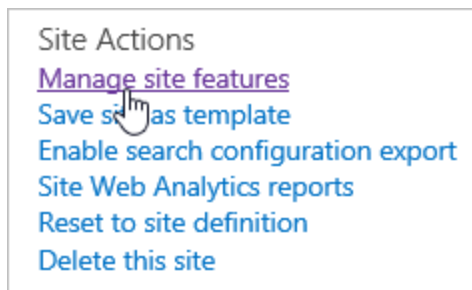
5. Click **Return** on your keyboard to display all the available templates.
6. Select the site that you created in the previous section and click **OK**.
7. Click **Create**.



## 2.8 Activate Required Site Features

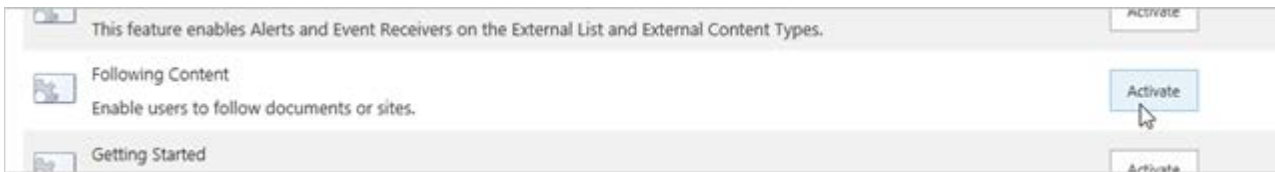
Some templates require specific features of SharePoint to be activated.

1. Navigate to the project site you have created from the imported template solution.
2. Click **Settings**  | **Site Settings**.
3. Click **Manage site features**.



4. Click **Activate** for the required features.

All downloaded BrightWork templates require the **Following Content** site feature to be activated.



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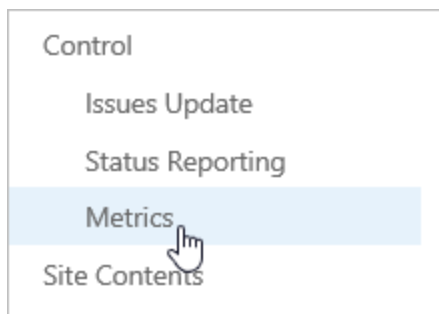
**Note:** This Following Content feature is a SharePoint Portal Server-only feature. If you are using SharePoint Foundation, the feature will not be available and does not have to be activated.

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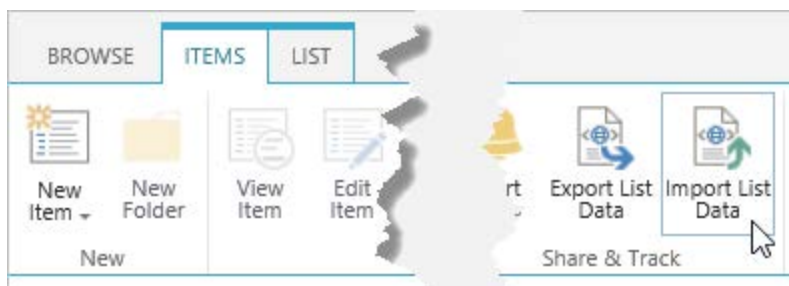
## 2.9 Import Metrics

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

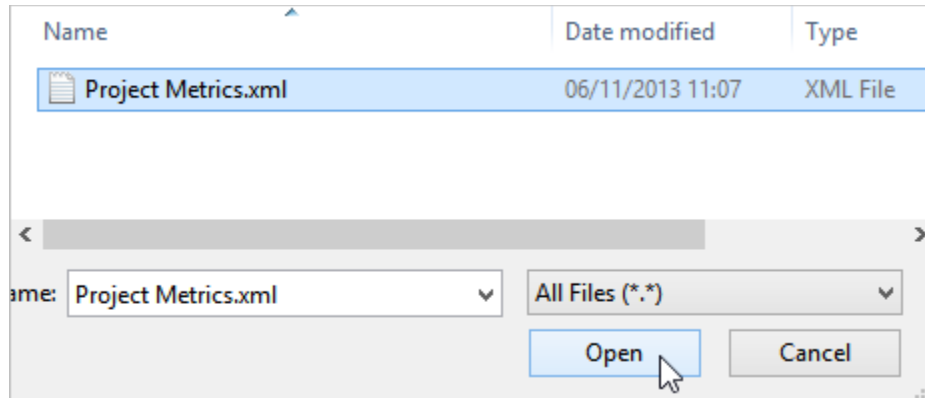
1. Click **Metrics** on the Quick Launch.



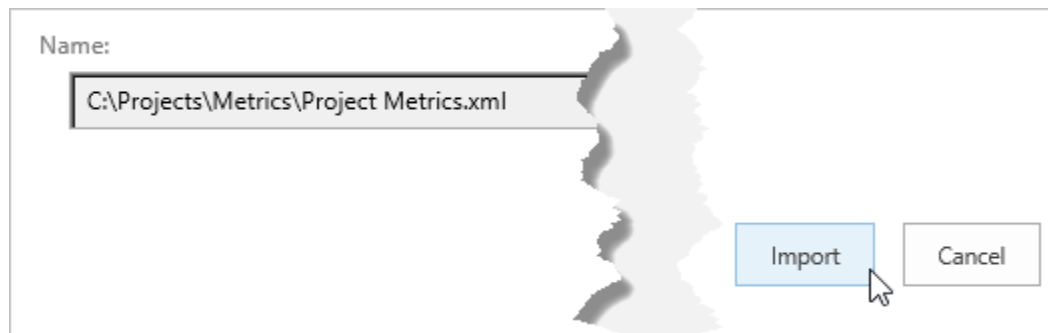
2. Click **Items | Import List Data**.



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



- Click **Import**.

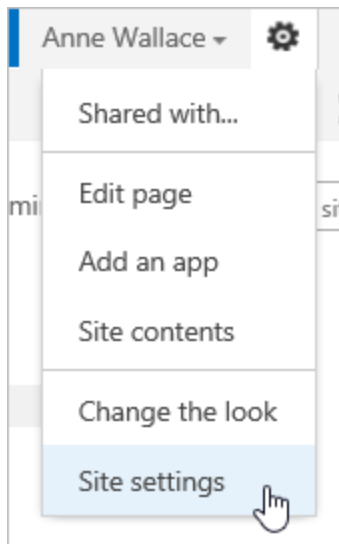


## 2.10 Delete Solution Site

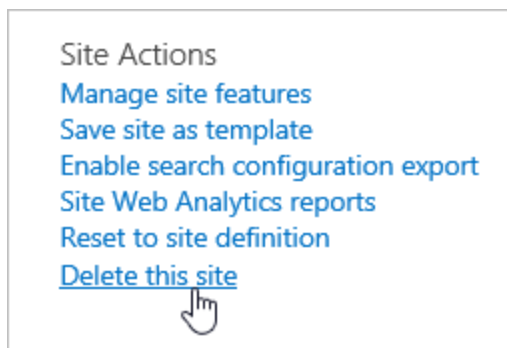
In this section, you will be deleting the site you created in 2.6 *Add the Solution to the BrightWork Templates Area*. Whilst this step is optional, it is recommended to avoid any potential confusion.

- Navigate to the home page of one of the sites you created from the solution gallery.

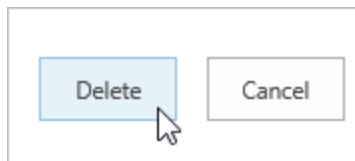
2. Click **Settings**  | **Site Settings**.



3. Click **Delete this site**.



4. Click **Delete**.



5. Click **OK** to confirm the deletion.

