pmPoint for SharePoint 2010 Work Manager Guide

Contents

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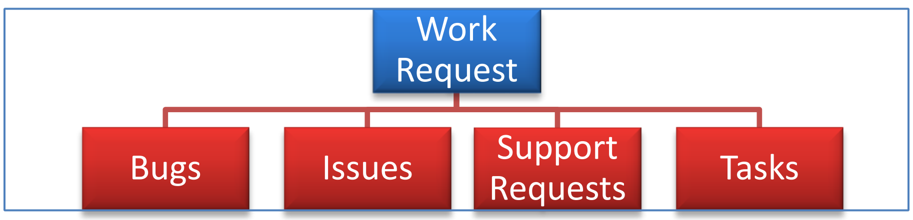
Introduction

pmPoint for SharePoint 2010 has a number of out of the box templates for managing projects/work, as well a number of additional templates that can be downloaded, of which this is one. This “Work Manager” template can be used to manage a stream of work requests that can be routed to the most appropriate list using a built-in workflow.

This template contains a list called the ‘Work Requests’ list into which requests for work can be added and then processed. These work requests can be updated and either actioned then and there or routed to other more appropriate lists for further action. The Work Requests can be routed to the following lists:

- Bugs
- Issues
- Support Requests
- Tasks



Work Tracker or Work Manager

pmPoint also ships with an out of the box work template called Work Tracker. This leads to an obvious question, which should I use?

Work Manager is similar in function to Work Tracker but there are some key differences namely:

1. Work Tracker
    a. All items are stored in one list, using different ‘Categories’ to differentiate between Activities, Bugs, Tasks and Support Requests
    b. Work Tracker list can synchronize with Outlook Tasks
2. Work Manager
    a. Work Requests list can have unique referencing
    b. Items can be added to the Work Requests list or directly to the other lists i.e. Bugs, Issues, Support Requests or Tasks
    c. As items are tracked on separate lists they will scale better
    d. Management of changes to lists is easier to manage e.g. custom fields and views can be added that are completely unique to the specific list

Work Manager Overview

The Work Manager template can be used to manage a series of work requests. Work Requests are entered into the Work Requests list which has a workflow that can escalate the work request out to other lists in the site.

The different lists that a Work Request can be escalated to include:

- Bug
- Issue
- Support Request
- Task

A Work Request does not have to escalated, the Work Request can be actioned then and there and the status updated to mark the Work Request as complete. This would be appropriate for instance for a very simple defined piece of work that does not require an Assigned To person and no tracking of the cost or the effort is required.

To create a Bug, Issue, Support Request or Task from the Work Request a workflow can be run that will:

1. Prompt you to select the list to Escalate the Work Request to
2. Check if the Work Request is not already marked as complete
   If the Work Request has a status of (3) Complete then the workflow will complete as normal but will not create the new item
3. Create a new item in the selected list i.e. create a new Bug, Issue, Support Request or Task
4. Copy over the different column values from the Work Request to the new item. The specific items copied over depend on the list selected
5. Update the current Work Request item by setting the Status to (3) Completed and setting the Work Type to the name of the list escalated to. This means that items can be viewed by Type after they are Escalated to quickly determine which Work Requests went to which lists

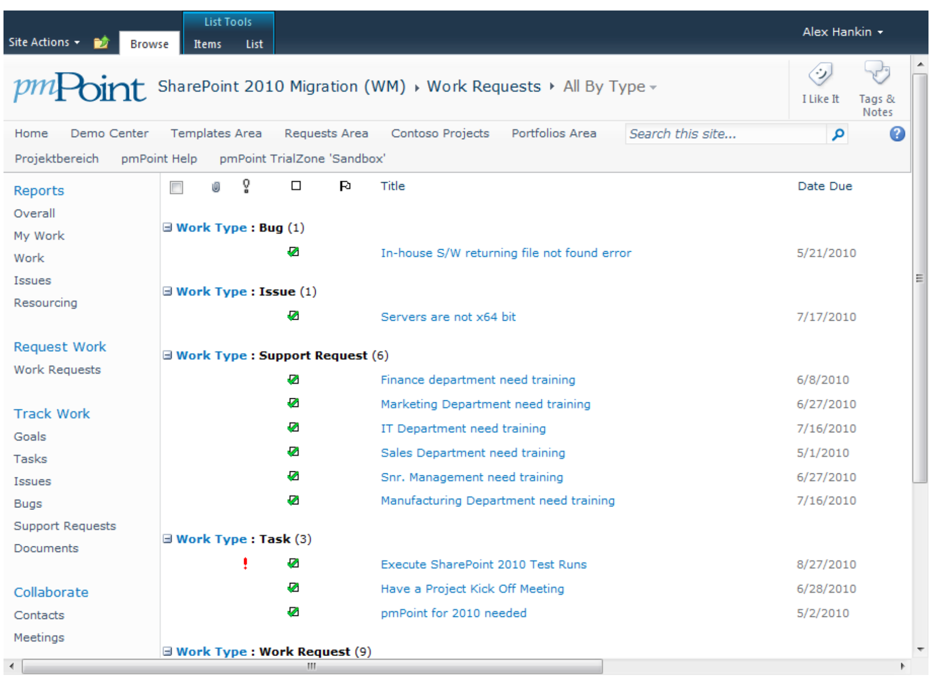


Figure 1: Screenshot of the Work Requests list in pmPoint Sample TrialZone site collection

Appendix I: Setup

This section describes how to add the pmPoint Work Manager template to a pmPoint Site Collection. This topic assumes you have a pmPoint 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 the WSP File to Solution Gallery
4. Add the Solution to the pmPoint Templates Area
5. Delete the WSP files from the Solution Gallery
6. Republish the Workflows

Obtain the Necessary Files

1. Download and unzip the 'pmPoint Work Manager 2010.zip' to a suitable location on your desktop.
   Files contained in the zip include:
   - Work Manager.wsp
     This is a work template intended for managing a stream of work and moving it to different list depending on type
   - Icon Images
     Image files used to indicate the severity of any bugs being tracked
   - pmPoint for SharePoint 2010 Work Manager Overview.pdf (this document)

Add Icon Files to SharePoint Server

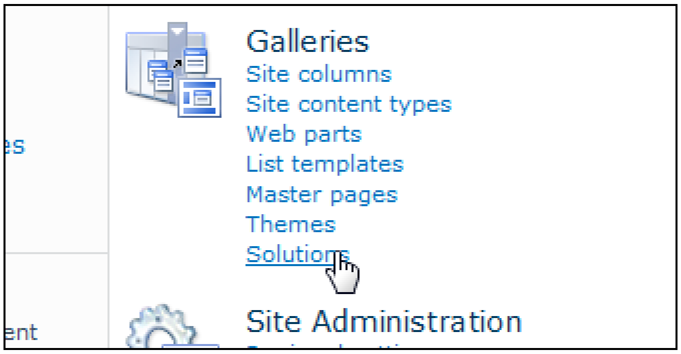
The Bug list includes some Choice Indicator Icon columns that reference image files that must be added to the server.

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.

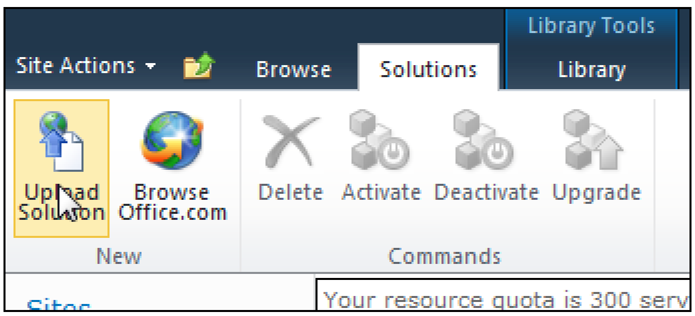
Note: This step only needs to be carried out once per relevant web front end. If you are not able to access the server, you can update the URL in the Bug lists Choice Indicator Icon column to use local URLs or to use URLs for images that already exist on the server. Please see http://bit.ly/bezdFe for more information on how to achieve this. If you need to that this second approach we recommend you do this in the template in the Templates Area once and reuse it

Add the WSP to the Solution Gallery

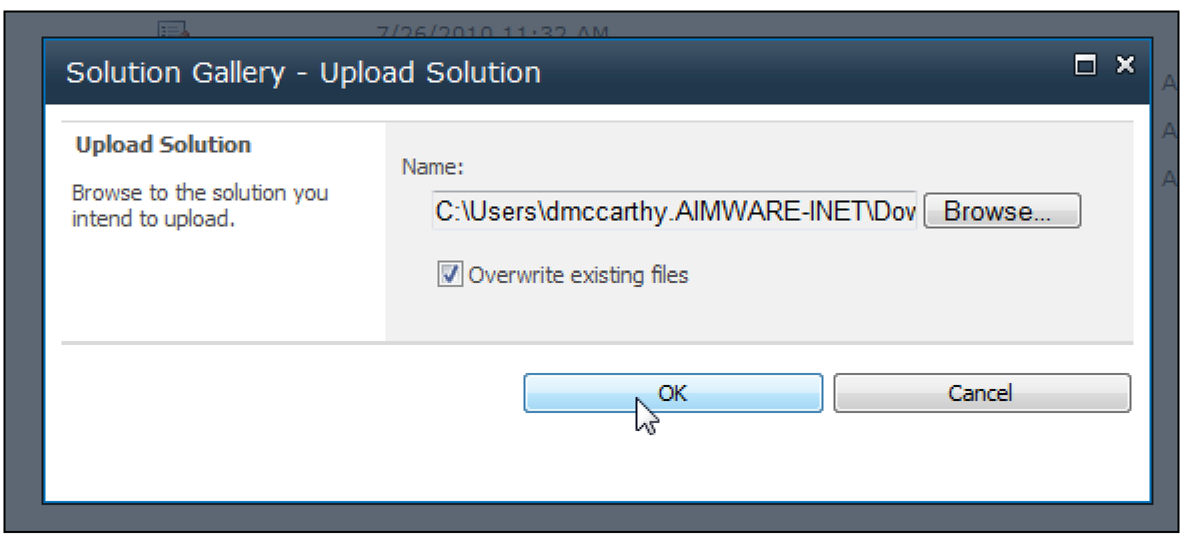
1. Click **Site Actions | Site Settings** on the pmPoint site collection home page.
2. Click **Solutions**.



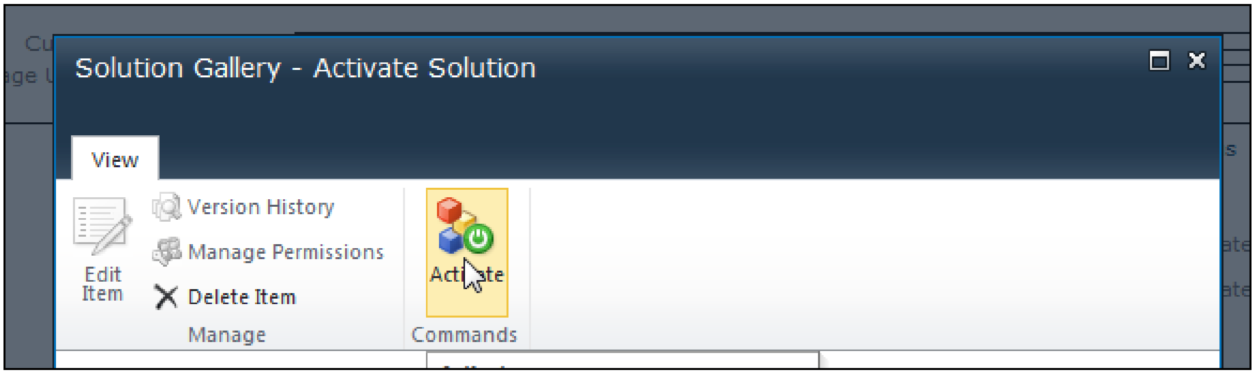
3. Click the **Solutions** tab.
4. Click **Upload Solution**.



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



7. Click **Activate**.



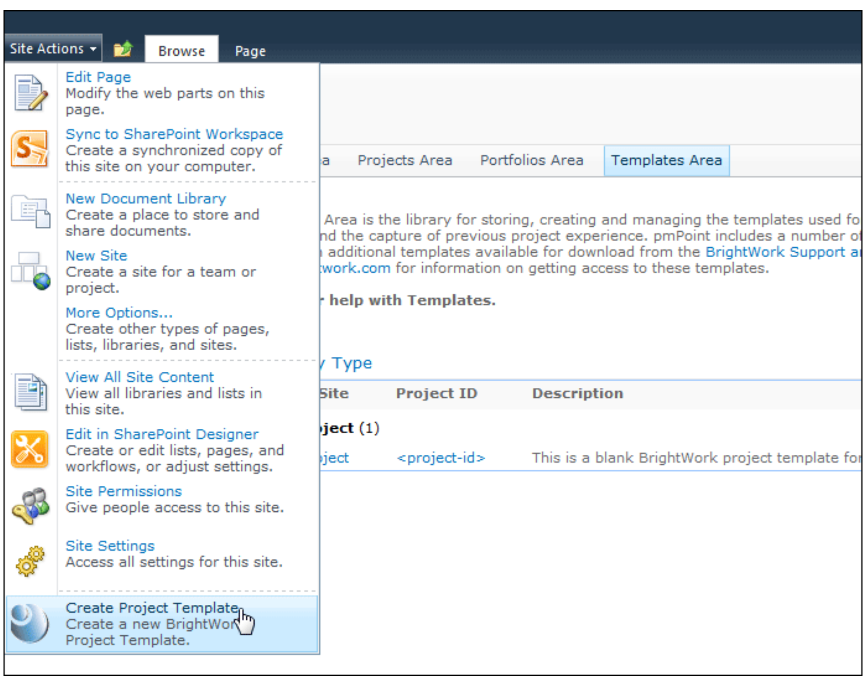
Ensure all Site Collection Level Features are Enabled

If there are no templates in the Templates Area, other than the default Blank template, you need to ensure that all site collection level features are enabled.

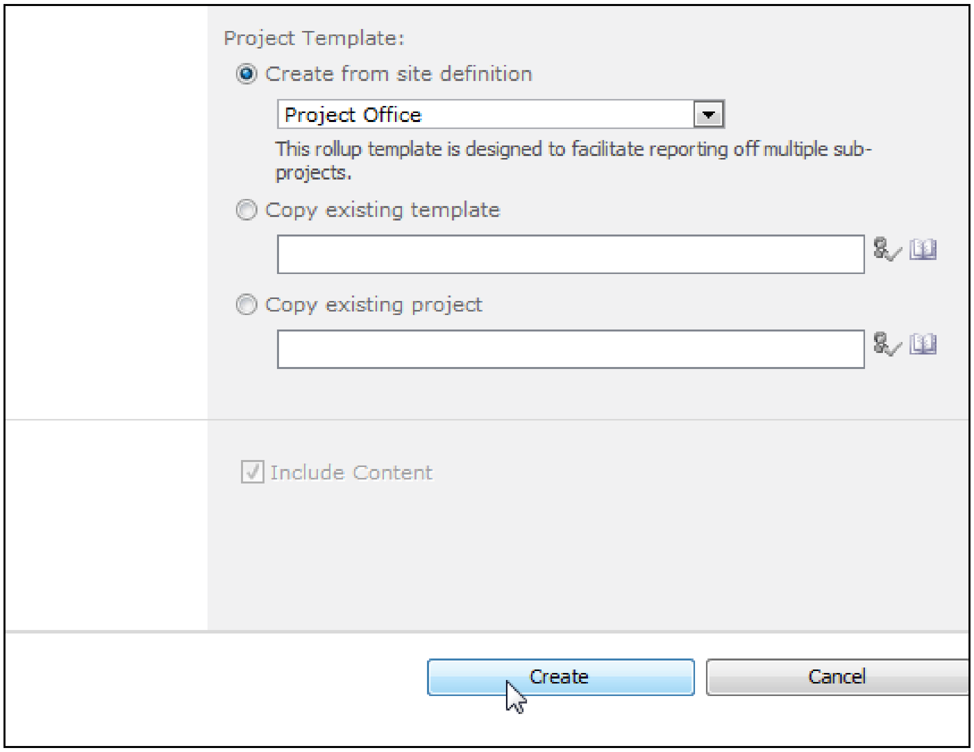
The simplest way to achieve this is to create a project template from one of the out-of-the-box templates. The one we recommend starting with is the Project Office.

To do this:

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

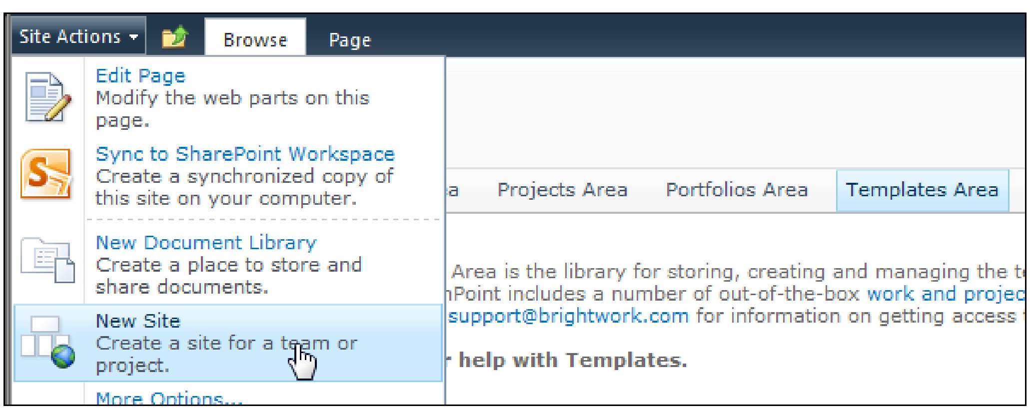


3. Enter a Title and URL Name.
4. Select a template from the Create from site definition menu.
5. Click **Create**.



Add the Solutions to the pmPoint Templates Area

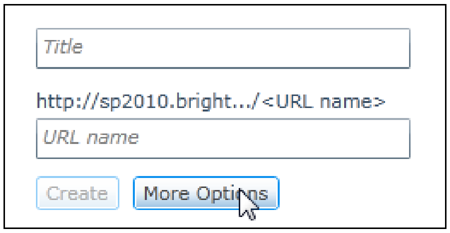
1. Click Templates Area on the top link bar.
2. Click **Site Actions | New Site**.



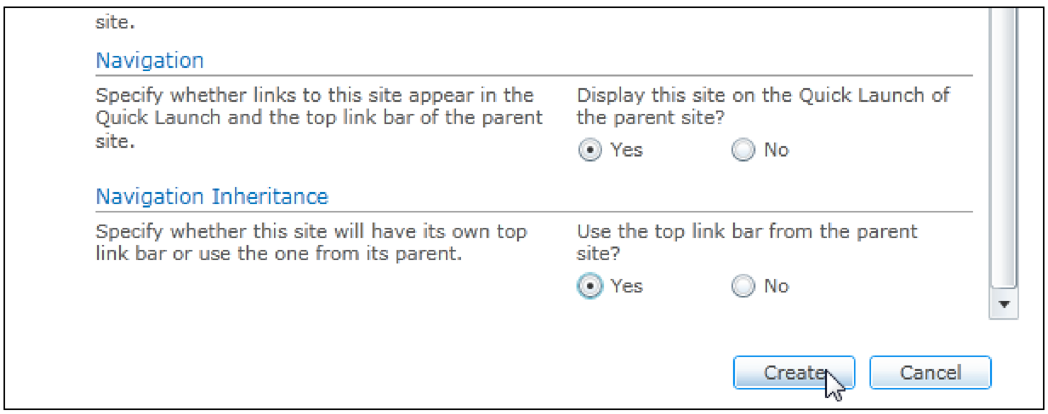
3. Select Work Manager you added to the Solutions Gallery.

   Note that one of two user interfaces will be displayed. Either a graphical interface for those running Silverlight or the original interface with solutions available in the **Custom** tab.

4. Click **More Options**.



5. Give the site a Title and a URL name.
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**.



Verify Workflow on the Work Requests

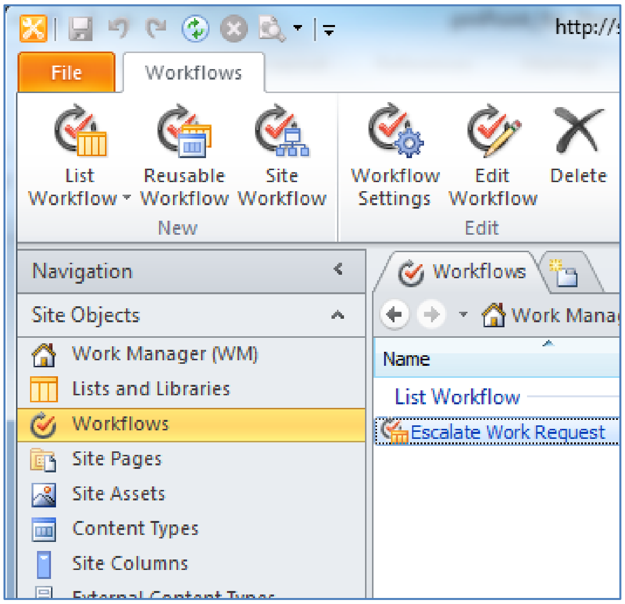
The Work Requests list in the Work Manager template has a workflow built using SharePoint Designer 2010 that is used to route Work Requests to other lists in the site. This workflow should work after a new site is created and you can follow the steps above to verify this is the case.

Note that if the Solution loaded to the Solution Gallery is deactivated then this workflow will cease to work. To fix it, follow these steps:

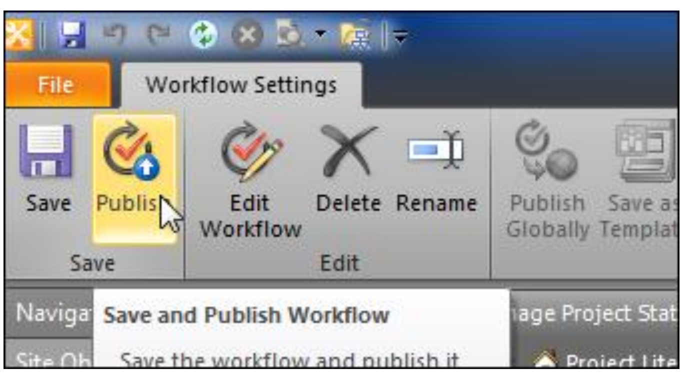
Note: This section requires you to have SharePoint Designer 2010 installed on your client. SharePoint Designer 2010 is free and available from Microsoft at the below links:
32 Bit Client: http://bit.ly/dBonNt
64 Bit Client: http://bit.ly/dyEBZq

It is possible that some site collection and/or server configuration may be required to allow you open sites using SharePoint Designer – see http://bit.ly/9Pad8s for more information on this.

1. Start SharePoint Designer 2010 and click **Open Site**.
2. Enter the URL of your new Work Manager template site.
3. Click **Open**.
4. Click **Workflows**.



5. Click the **Escalate Work Request** workflow.
6. Click **Publish**.

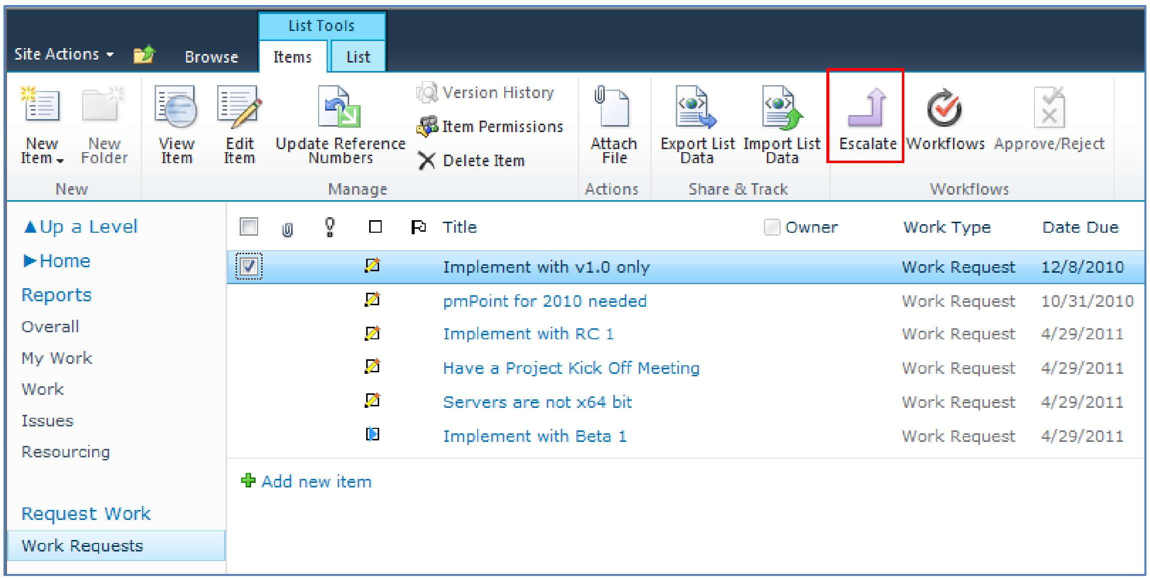


Note: A warning about an InfoPath form may appear. In the event of this happening, click Ok and continue.

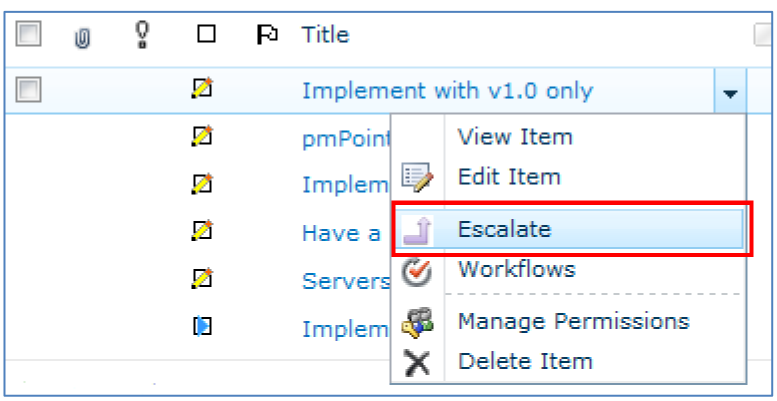
Appendix II: Custom Actions

In pmPoint TrialZone Sample site you may notice that there are actions available that will run the Escalate Workflow. These can be seen on the item ribbon, the list item menu and the display form. These actions are not retained when a site is created from a solution template in SharePoint 2010 as Sandbox sites in SharePoint 2010 do not support these custom actions. However, if you have a Work Manager site instance that you would like to add this feature to here are the steps required. With the steps are screenshots of the different custom actions used in the TrialZone Sample site.

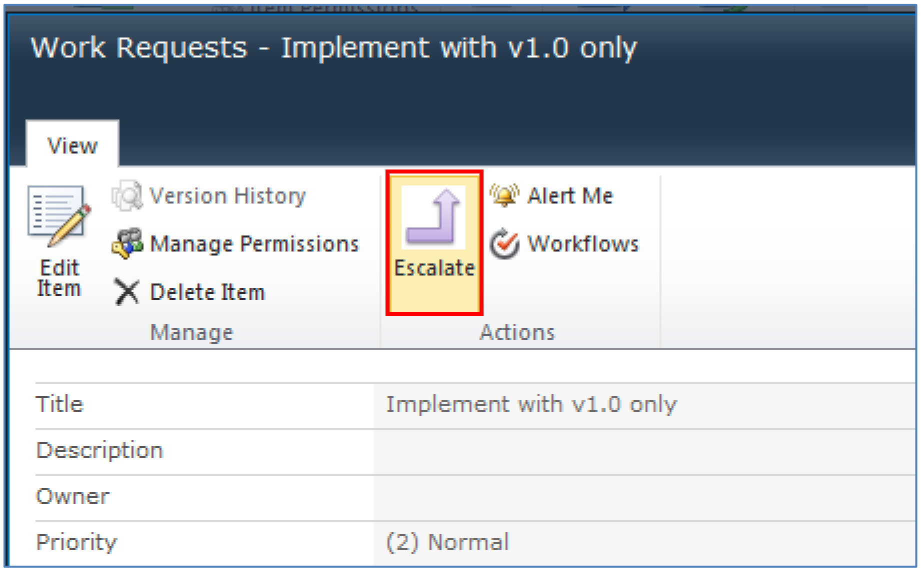
1. Items (View) Ribbon



2. List Item Menu

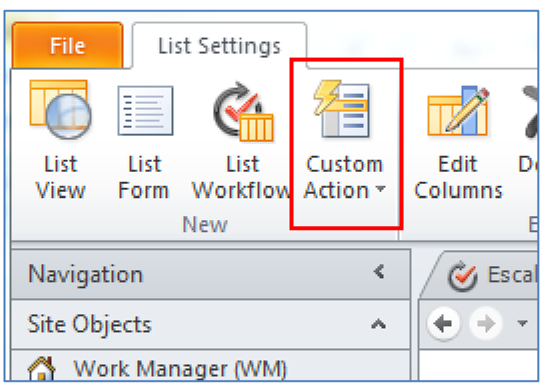


3. Display Form

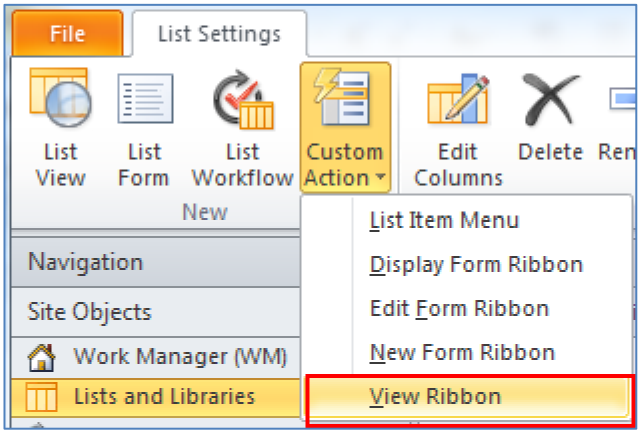


Steps to add these Custom Actions

1. Start SharePoint Designer 2010 and click **Open Site**.
2. Enter the URL of your new Work Manager template site.
3. Click **Open**.
4. Select the **List and Libraries** link.
5. Select the **Work Requests** list.
6. From the List Settings ribbon select the **Custom Action** icon.



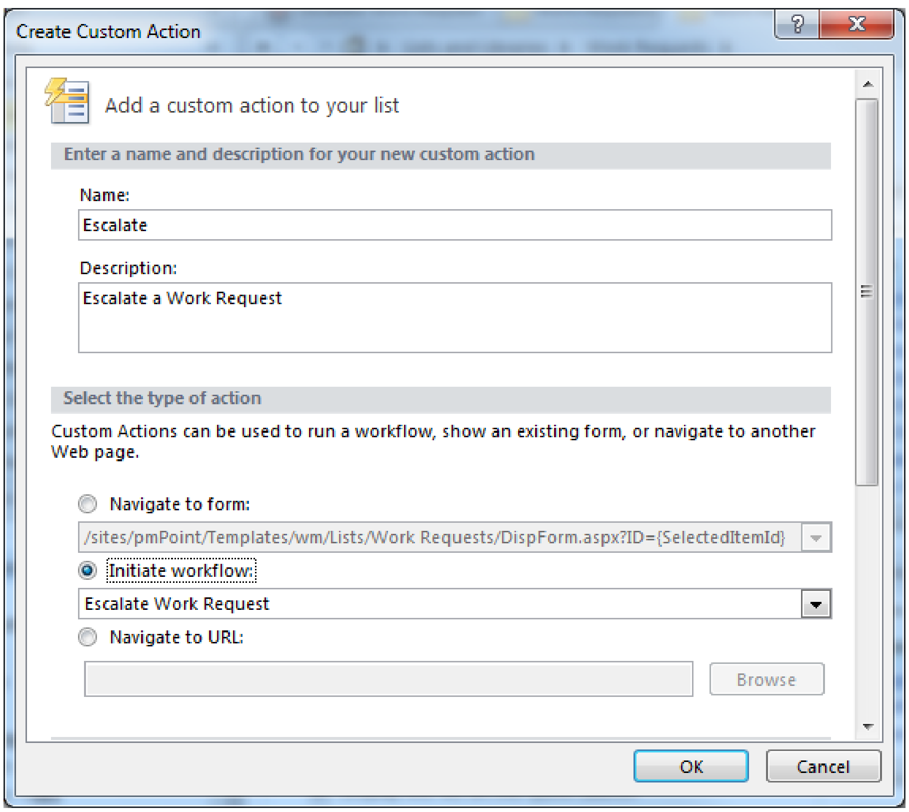
7. Select **View Ribbon**.



a. Enter **Name** of *Escalate.*

b. Enter **Description** of *Escalate a Work Request.*

c. Select the type of action to be **Initiate Workflow** and make sure that **Escalate Work Request** is displayed.



d. Scroll down the dialog and for the Button image URL (16x16) and click **Browse**. In the folders dialog select the **images** folder and the **Esclate16x16.png** file.

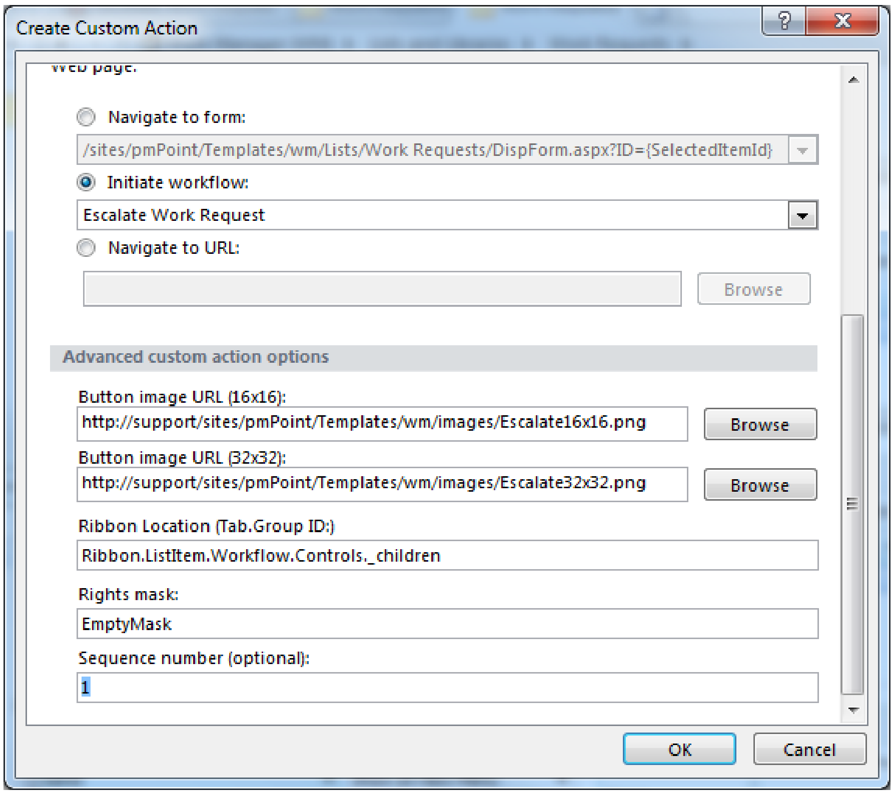
e. Scroll down the dialog and for the Button image URL (32x32) and click **Browse**.

In the folders dialog select the **images** folder and the **Esclate32x32.png** file.

f. In the Ribbon Location field enter:

Ribbon.ListItem.Workflow.Controls._children.

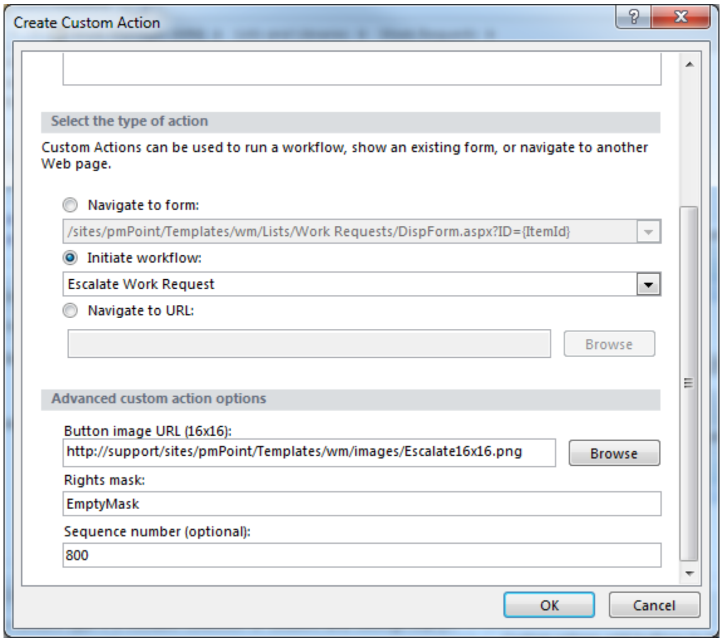
g. Set the **Sequence Number** to **1**.



8. Select the create **Custom Action** icon again and select **List Item Menu**. As previously fill out the dialog and note that:

   a. Only one 16x16 image is needed

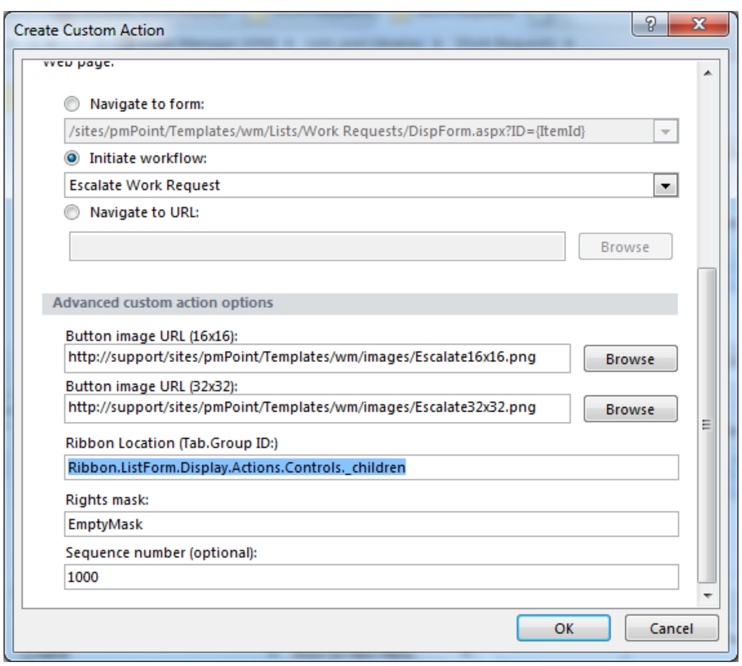
b. **Sequence number** should be **800**. You may decide to change this based on what other SharePoint Add-ons you may have running



9. Select the create **Custom Action** icon again and select **Display Form Ribbon**. As previously fill out the dialog and note that:

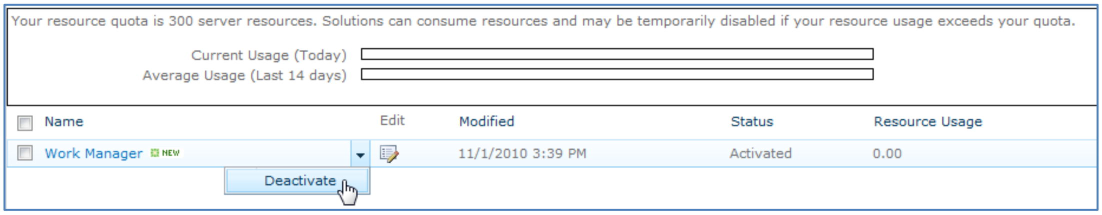
   a. Ribbon Location is: **Ribbon.ListForm.Display.Actions.Controls._children**.

   b. **Sequence Number** is **1000**



Appendix III: Delete the WSP File from the Solution Gallery

1. Navigate to site collection home page and click **Site Actions | Site Settings**.
2. Click **Solutions.**
3. Select a solution and click **Deactivate**, e.g.



4. Select the solution and click **Delete**.

5. Click **OK**.