OK, well thank you everyone for joining us today. We're doing a quick project online, General tips and tricks session today and will be covering some of the basics of using project online. Get you familiar with some of the navigation. Some of the ideas of what you can do with the system. My expectation is that people are going to be coming from multiple different points of view here, some. Some of the folks will probably have had some chance to use project Online previously. Some of you may have just acquired the system and are starting to try and figure out what you could do with it. And then, of course, there's going to be a group of people who you know we're just curious because you've never necessarily seen project Online will respect all those points. View.

This is going to be a very high level session, so there shouldn't be anything that really loses anyone but some of the topics may or may not make as much sense, depending on your past familiarity with Project online and Project Server and Project on the desktop etc.

My name is John Michael Scott. I am the CEO of Green Data dot IO. Our business is really trying to help organizations be successful with having better project management process and integrating that with tools in order to be able to provide the kind of leadership, dashboarding and reporting that everybody needs in order to make good decisions or backup and support your projects.

With that said, I'm going to go ahead and kill the video and I'm going to switch over to screen so you guys can see what I see on my screen. OK, so First things first, I'm going to maximize the view of project online just to get us a little bit of familiarity here before we dig into some of the things that we're going to cover today. Project online is Microsoft's offering to enable project managers to engage in a collaborative project management experience. As everyone who has used project on the desktop maybe familiar projects loaded in desktop is great, but you definitely have some challenges when you're trying to share and get updates from people. When you're trying to communicate and provide leadership with. High level summaries of what's going on in projects.

So project online was introduced back around 2002 and has been progressing ever since. Today it's a pretty solid product that a lot of people who are using project from Microsoft have started to adapt to an adopting their organizations. The first thing you're going to see on your screen here is just the main landing page of project online and you can see that there is a top ribbon concept. The ribbon is similar to what you would see in project Desktop. You're going to see that there's always some kind of a title to the page that you happen to be on. There's the body section of the page containing a series of different web parts. Project Online is based on share point, so if you're familiar with SharePoint Online or SharePoint on premise, you'll be familiar with some of the user experience and interface designs that you're seeing here.

Across on the upper right corner. You'll see that I am logged in as a fictitious person by the name of Steve Masters, and so our top bar here gives us access to our account. It also gives us access if you were, for instance, configuring the application gives us access to the main areas that we might configure, whether it's the SharePoint experience that you see or whether it's the project management components within project online, across on the far left we can see which application we're currently connected to and you'll see. To some degree, the familiar waffle. If you have been using Office 365 that will be in the upper left corner and finally on the left hand side, here are left navigation is specific to project online and is showing us the different areas within project online that we may be interacting with.

OK, so that's a pretty quick summary on in regard to navigation. The session is being recorded, of course, so you'll be able to reference back to this session later if you need to. If I've gone too quickly over anything or something doesn't make sense, you want to look back at. It will make sure to send out the recording links for everyone. OK, so the first thing on the top of our list is how do we connect project professional to project online? Well, there's two real answers to that. One answer is the slightly, slightly easier way and one answer is slightly more complicated.

The easiest way to connect Project online the very first time. With project professional in your desktop or project online desktop is it's called today is to actually click on this icon from within the Project Center, so as long as there's at least one project in project online that you can see, you will see an icon an it will reference that. This is an enterprise project. You can open your project for editing and project professional. So what's convenient about this is if you click on this link and let's make sure. Projects not open for a second here. OK, do you click on? This link will attempt to do is it will actually make a call to the browser to say hey I want to open an application and you can see that it's trying to open a project and you can see what site is trying to make that opening because I waited too long it is a little annoyed with me so it's going to present this action not available. I'll just go ahead and cancel close that an click it again but if I am now waiting too long it won't timeout and it will ask me do you want to open this file and I can say, yes cool. So if I do that, it will actually automatically set up the connection string or the connection settings between project online desktop. Which were in right now very familiar for everybody who's used project standard or project professional or the years.

Or Alternatively, if we don't want to do it that way, we can also manually set the connection as well and I'll show you how to do that really quickly, so I'll go ahead and discard this. This project and I'll go directly to project on the desktop. So if I'm going to connect to project online desktop, I'm going to start out by working offline. If this happens to come up, the normal operating behavior of the system is that it will just come up in offline mode. If you have not previously created any connections to anything, so. We would see something like this, and in order to see the left hand navigation link that I need in order to set up the connection string, I actually have to open a blank project at a minimum. Once I've done that, then I can go to file and I can see the info menu item. The info menu item is where we have this piece that says manage accounts cool. So if we click manage accounts we can go into a configuration dialog box here. An we can add an account. Now in this case I've already added the account, but I'm just going to make a similar representation of it for purposes of the this recording. So we specify the link. Now I happen to know it off. And but since not everybody just randomly happens, know the URL that they have to specify will go ahead and grab that from the top of our screen here. So if I would normally receive this link from my IT professionals, but in case the link would be something that looks very much like this PPM demo or California DMV or green data.io.sharepoint.com/sites/something healthy PM prod PWA. It will have some kind of an identifier for this specific project online site that you're connecting too. So we grab that. We go back to our Project online setup and you should see that it looks pretty much the same as what I had already typed, but I will paste it in just to be 100% sure that looks good. I'm going to set that as the default account and then we go into this topic of working on line versus working offline, so you'll notice that there's this opportunity when starting to just use my default account, which most people would probably end up doing or to choose an account if we choose an account. And then we're going to see a pop up box and it's going to allow us to choose to work offline or. Next to the computer, well, desktop or connect to your various different instances. Cool so once that set we can closeout of project desktop open again, we will see that we have this drop down because I selected demo health too as my default. We see it automatically loaded here and I can hit OK. An I'm now connected to the instance. What that means is that if I click open. I will see Project Web app, so I'll see my connection to project online here demo Health too and I'll be able to browse and similar to browsing on your desktop for files you'll be able to browse a list of the projects that are on the system, so that's a really quick take on going through and connecting to project online from project professional.

Now we're going to do something else. We're going to import a project. OK, so I've set aside A roll rate connect to the system so that's a good start. I've set aside a project on my desktop. That is waiting for me to Import it's called DMR update our three. I'm going to go ahead and open that up now. The import process for project desktop project online. It's not completely convoluted. There is wizard. It's not bad, it just takes a little getting used to. And we're not going to go crazy here with trying to explain every single piece of it, but will try and knock this out pretty quickly.

So First things first, we're going to save as because we have an offline project. And we want to save it to the online system to import it, and we're going to use the import wizard so we can check that box to get to go to where we are. We just did. You click file and that brought us to this backstage experience. We click save as and we can see the instance that we're going to save against. Once we've checked the import Wizard box, we can go ahead and save what this will do is it will take us through a little wizard over here off to the left. Which allows us to take care of a few cleanup and organization set.

As for posting our project online, First things first, it's of course very likely that we have some named resources that we have tide up against the tasks in our project, so we want any of those resources to instead of being local meaning of resource that's just within our offline project. We want them to be connected to our online resource pool. The reason we care about this is that this starts to give us some of the collaborative power of project online. For instance, we get to know weather Harvey or Tyler are busy on other projects besides our project. The only way we can get there is by making a connection and substituting in the enterprise resources in place of the offline or local resources. So we'll go ahead and do that really quick. Here. You see that there is an opportunity to map resources and we see conveniently for me all the names are exactly matching. Now obviously I did that on purpose, so I see that I have a local resource called in Gray. A local resource called Arturo Becker and it will list in your project the entire set of resources that you have ever put into your resource sheet in your desktop copy of Project. So here we go.

I wanted to map an great to enterprise and want to map arctura Becker because it recognized everybody. It made this pretty simple for me. It asked me the question do I want to map to enterprise, it substituted yes for every single answer and really I have almost nothing to do here. If on the other hand, Gray was spelled differently, like a space Avalyn space Gray and maybe it couldn't directly recognize the enterprise resource name versus the local resource name. You can explicitly map individual resources, so you can actually click on the drop down, go through the list of resources that are available in the system, and map them out. OK, let's say we're done with that. That takes us through the first step.

Great, we can go to Step 2. Right now we want to do a quick validation and we don't see any errors. There's no issues. Everybody has been matched up, so it has performed that validation against the resources we want to import.

Will continue to step three. Step three is to map a task custom fields. When do people use task custom fields? Well people used to ask us some fields when they want to provide additional metadata about each task. Great example of this. Some organizations establish a project health check which is a set of custom field sitting in their project schedule that show them whether they are, you know over allocating resources or whether they have. Task that don't make sense or whether they have failed to baseline their project. All these kinds of ideas we can put into custom fields. OK, so if we've been working offline the whole time, we most likely have as set of custom fields in our actual offline project. So this gives us an opportunity to map the contents. Normally this would mean that you would work with your project administrator and you had set up matching fields so that that mapping could take place. You know, fairly typically the mapping would be like field to like field. So if I'm looking for some kind of baseline, well that's going to be some kind of a formula that figures out whether or baseline has been set. So you get the basic idea. In this case we don't have anything we want to go ahead and map.

So I'll go ahead and continue to Step 4. It's checking to make sure that it is recognizing all the tasks that we have in the schedule is confirming with us that there are 10 tasks and it didn't find any errors. If you did see any errors, we would see them in this box and we would have the opportunity to fix things an address them before we actually finished the import process. We won't get it all right before we publish to the server. OK, so it looks like everything is good.

The last step in my progression for importing is to go ahead and. Save the project. It's going to ask us for a name on the server, so I'm going to name this the same thing, VMR. Update V3 and this is actually taking us into our next step of saving and publishing schedules online, so. We're going to save it as a project. Your options are project or a template. If you were creating a template for everybody else to use, we're going to use the standard calendar so calendars can be set up in order to account for resource time that's different, like somebody who works 24 hours schedule in shifts, or somebody who works the late shift. Or, you know, nonstandard times from this from the standpoint, different countries, etc. This also gives us the opportunity to fill in any blanks as far as any custom fields that are about the project level as opposed to. The detailed tasks level, so in our system we may have budget fields or other things that we want to account for. But let's say that we're all set, we're going to save our project.

This then has done some interesting things. First thing it's done is it's said, well, Harvey Day and or Tyler. Nulls appeared to have some over allocations and I can, you know I can do something about that. I can look at tasks Inspector rescheduled to available dates. I can actually cause my schedule to account for things that are now known about these resources from the server. So pretty cool. OK, let's go ahead and close our import an will accept things as they are and I'm going to do the final step after saving, which is to make sure to publish my project. What's the difference? Why do I have saved? And publish well. The idea here is that if you save a project, you can just save your version of the world and you can. Then you know make iterations and updates. What if modeling do whatever you need to do before you publish the master version of your project for the rest of the world to see. So published projects are the ones that people can see through the online web experience versus saved projects are just things that the project owner can see. OK so we saved it when we first imported, so we'll go ahead and now publish in order to make this project be visible online and will move on to the online interface. You also notice that because of the way things are set up, an integrated with SharePoint, I can also create a SharePoint site associated with this project and I will go ahead and let that go as is. Also see that every time I save or publish things at the bottom of the screen, there's going to be a signifier to let us know that something is in progress and partially complete, mostly complete, completely complete, etc. Takes a few seconds depending on what action you perform because I told it to go deal with the creation of a project site, it'll probably take a little bit of extra time as it waits for that to be completed.

In the meantime, we'll go ahead and move on to the online interface and will start. Figuring some more things out, like how do we create a simple schedule from the online interface? Hey, this is going to be pretty quick here. We're going to create a brand new enterprise project from the online interface instead of from the desktop. It's going to present us some basic information and questions that it wants to know about. I'm going to call this CMR bye. I'm gonna say that the start date of this project is out on the 23rd of November. As you know, we always want to do things right before Thanksgiving, so should be fun. Will specify if it's part of a particular portfolio. So product innovation and we're going to go ahead and accept everything else blank as is. You can click finish, it will now create a brand new project online and we will specify. Steve Masters, our demo user, as the owner of this project. It will set the start date an we will be taken into the details of the project so you can see really at a glance here that this project has a workflow tide to it. We won't talk about that today. It has some project detail pages where we can get business case types of information or any other metadata that we're trying to keep track of. But most importantly it has a schedule attached to it and so I can start using the online interface to flush out my tasks I could. You know, maybe introduce an ADBT where we're going to do analysis, design, Build out, testing and I can do that really quick and I can also start inserting subtasks. And I'm just going to make my life easier here by lips. Lost that one moved it around. I'm going to copy and paste these just to. Get this happen a little faster for everybody will go ahead an. Correct some things here and you see that it's pretty close. It's not perfectly the same as using the desktop, but a lot of the experience is pretty similar, especially as you're going essentials of work breakdown structure, adding resources, things like that, so that gives us a basic idea of how to create a simple schedule from the online interface.

Now let's go ahead and save this and we will publish it as well. And then I'm going to staff it. So we've talked a little bit about enterprise resources. While all of that. So publishing happened pretty quick here because we had a pretty simple schedule, but we've talked a bit about only resources or enterprise resources. The enterprise resources are iaccessible, both from the online experience an from the desktop. The experience is bit different in the sense that we have a dialog box that pops up on the screen in project desktop, whereas here we have a web view, but the basic idea is you can select and choose the resources you want to add to your project. You can also substitute them in if you're using generic resources, so that happens a lot when people are creating consistent templates, they'll create a set of generic resources against series of tasks. You can go ahead and replace generic resources with named resources. This gets you through sort of the basics of how do I add people to my project once I have saved and closed it will take us back to the schedule and now those resources that I've just added should be visible here. So I can add Brian. Charlie. Natalie, two different tasks that I have on my schedule now. It is going to add them as 100% allocated, so that's notable that is 1 difference that you should pay attention to when staffing a project from the online experience versus staffing it from the desktop experience where you can be more specific and say I only want this person 10% of the time or 30% of the time. OK, so I'll go ahead and do one more publish if I just do publish it will actually save the project at the same time. So in the case where you don't need to do what if modeling or anything like that, we can go ahead and do that as a single action. I'll go ahead and close the project. I'm going to check it in the concept of check-in is make it available so other project managers could open in, edit it, or you know my boss, get open and edit it, etc.

OK, we're going to jump really fast into now the Resource Center so that we can look at the concept of trying to understand staffing models. I'm going to just make sure I select. Let's see, I'm gonna clear all I'm going to select couple of folks from the system support services and will try and get a little bit of an idea as to how people's utilization is looking. So in project online, besides having this area for projects where we can see the list of all the projects are available, you also have an area where we can see the enterprise resource Pool and see what their availability is. You'll see that the left hand navigation has multiple other centers. We won't cover all those today, but we welcome you guys to all join us again for additional deep dives into other areas of the product as well. But for our case we're going to look at the capacity planning, which is in the top ribbon. Capacity planning then takes all of the project data from all the different projects that people are assigned to an munches it together so that we can see. Compared to availability, how peoples’ utilization really looks like in the case of Danny Franklin, he's definitely over allocated for September and October. And we can get a, you know, kind of a view of that. Also from looking at the individual months across our chart here. So that's a quick and dirty view of how we can get some of the resource capacity and utilization information in the Resource Center now.

Last but not least, we were going to jump really quick into how do we create connected reports from Power BI? So power BI came along into the world of project. Back in about 2016 is when it really started to take off and it has grown by leaps and bounds. Power BI is a pretty easy to use. Platform for building reports and visualizations, and it allows a couple useful things. First of all, besides the fact that I can. You know, certainly connect directly to project. It actually is an enormous number of different connectors, two different databases, an online systems. It also acts EPS and adheres to the O data standard.

So there's a standard method for getting data feeds called Odata an we actually use that one here with project in order to make our connection. So you basically put in the URL. For the. You put in the URL for the the project instance that you're trying to connect to, so that would be like PPMdemo.sharepoint.com/site/health and then you have to know exactly what the end point is to get access to that data feed, but once you've done all that then it takes you to a pane where you can make a connection with your credentials. If you have not already done so. In my case, I've already made a connection so it directly to the data sets that I have available.

OK, so once we have connected to a data set then we can literally start. You know, dragging and dropping things onto our surface here. And it will attempt in power BI to figure out what we want to do. So if I just drag a set of a list of names, it will assume that I want to have some kind of a list an I can see that there's this whole set of visualizations over here in the visualizations column on the ladder, right? Third of the screen where I can choose different ways of looking at information. Maybe I just want a statistic. So if I choose a statistic, it will do its best trying to figure out what I mean. But in this case let's turn it into account so I can actually very quickly make adjustments to the data in order to present different kinds of information. And it will do its best really to figure out what it is we mean, no matter which visualization we choose from. But obviously, you know you also see underneath the visualizations that there are set of columns and fields is a little bit wizard like we can drag and drop different things onto our surface so but I want a card. It will put that on the screen by click on some more white space. I can put a pie chart whatever we need to do, as long as we give it a space on the screen to put it, it will do its best to drag the different pieces we want and we can just start clicking through our dataset in order to fill in any of the blanks, so that's just a really quick and dirty introduction to connecting with power by the big thing I would say about you know, especially if you are going to start building a lot of reporting. Be specific and have in mind the question that you want to ask and do not over communicate so you know we probably only need in the average dashboard two or three visualizations to communicate the main points that are relevant to our leadership

OK, I want to be respectful of time. I know that we're already pretty much a minute over, but I want to open up the line so that everybody can speak. And if you guys have any specific questions or thoughts, we will happily address them. While we have a minute or two here. Just unmuting everybody here. Trying to anyway. Huh? OK, it's a little hard to unmute. Then I thought it was going to be, but basically I'm just working my way through the list and unmuting everybody. If you have any questions, feel free to throw them at me and I appreciate your time regardless. Pretty much got everybody unmuted at this point. OK, so will just give it up for another minute or two for anyone who's guiding questions, otherwise will go ahead and wrap it up. And like I said, the closing notes on this will be providing recordings of this to everybody, so you'll have a quick snapshot of some of these tips and tricks. And as I mentioned in the beginning, will absolutely be inviting everybody to additional sessions if you want to go into specific details. Would love to hear from you, so will send out a pole to also ask for any insights on things that people feel it would be important. Alright, there's no if there's no specific questions will go ahead and wrap it up here. Then I'll go ahead and mute everybody back to close it out, and thank you very much for your time today. I hope this has been productive and useful to everybody. I appreciate your attendance and like I said will reach out with the pole will reach out with questions about anything else that you want to cover specifically where we can go into more detail. Thanks everyone, have a great day. Bye bye.