

How to Connect Project Professional 2007 to Server

This document is about connecting Project Professional 2007 to Project Server 2007. These instructions assume that Professional is already installed. Before going through these steps, make sure that you know the URL for the Project Server that you are using with Project Web Access.

To link Project Professional to the server there are two possible methods. The second method should be used if the options for the first on are unavailable to the user. The second method is explained later in this document.

The first method is to open Project Professional itself and then go to Tools, Enterprise Options and Microsoft Office Project Server Accounts.

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		Organizer	-				
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		Options					
		Enterprise Options		Microsoft Office Project Server Accounts			
			Open Enterprise <u>G</u> lobal				
			Open <u>E</u> nterprise Resource Pool				
				Import Project to Enterprise			
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After selecting Microsoft Office Project Server Accounts a box like this should appear. Make sure that "Manually control connection state" is selected. You want to manually control your connections in case you have more than one Project Server that you connect to or if you want to easily access the computer itself without connecting to a Server.

Project Server Accounts		×				
Available accounts:						
Name	URL	Default 🔺				
Computer		Yes				
Add Remo	Properties	Set as <u>D</u> efault				
Current account: Eserver						
When starting						
 Automatically detect connection state Manually control connection state 						
Help	OK	Cancel				

Click on "Add" to get these options:



Account Properties						
Account Name:						
Desiget Service UDL :						
When connecting						
Use <u>Windows user account</u>						
Use Forms authenticated account:						
Set as <u>d</u> erault account						
OK Cancel						

- In the "Account Name" type a friendly name that will remind you of this instance.
- Type the URL of your server (<u>http://servername/ProjectServer/</u>) in the "Project Server URL" line.
- Normally, you will leave the default of "Use Windows User account" for the "When connecting" selection. If you are using "Forms Authentication" you will have the userid and password that you should use.
- Select whether or not this will be your default account.

When complete, it should look like similar to this:

Account Properties						
Account Name:						
Litware						
Project Server URL:						
http://epm2007demo/litware						
When connecting						
O Use Windows user account						
C Use Forms authenticated account:						
∐ser name;						
Set as default account						
OK Cancel						



Confirm again on the "Project Server Accounts" box that "Manually control connection state" is selected before hitting ok.

Exit out of Project Professional and then open it again. This time, when it opens, a selection box should appear that will look similar to this:

Login					
P <u>r</u> ofile:	Litware				
User Name;	Check credentials checkbox to enter name				
Password;					
	Enter User Credentials				
	Load Summary Resource Assignments				
	Work Offline OK Cancel				

Since we selected "default" earlier, the Profile should already have our friendly name in it. If not, use the drop down next to the Profile option to select the name of the Project Server that you just created. If this is the first time you are logging in via this option or if the "Enter User Credentials" option is checked, then enter your username and password. Select "Load Summary Resource Assignments". Click on "ok" when you are ready.

If you use the drop-down next to Profile and select "computer" or "work offline" then you will be opening Project Professional on your computer only and you will be unable to access the server or server options until you exit out of Project Professional and re-enter by this method.



If the first method of accessing Project Server doesn't work for some reason, then the second option to link to the server is to go to the server account setup through the program menu.

Select start on your desktop, go to All Programs, Microsoft Office, Microsoft Office Tools, Microsoft Office Project Server 2007 Accounts. This will take you through the exact same sequence of steps as outlined in the first method above and copied here:

Project Server Accounts				x		
Available accounts:						
Name	URL		Default			
Computer			Yes	-		
Add	<u>R</u> emove	Properties	Set as <u>D</u> efa	ault		
Automatically detect connection state						
Manually control connection state						
Help		ОК	Canc	el		

Enter the same information as listed in the first option of connection Professional to Server.