

Outlook Add-In

This document explains how to setup/install the Outlook add-in for Project Server 2007.

In PWA, go to Personal Settings.



The last option should be "Set Up Outlook Sync". Click on it and the synchronization download button will appear:

oad the Outlook integration add-in
look add-in enables you to:
Import your tasks and timesheet to Outlook, and view them next to your existing tasks and appointments Report on the progress of your tasks and update timesheet information from within Outlook
ments:
A valid Project Web Access account
Microsoft Office Outlook 2003 or later The Microsoft Office Project 2007 Add⊣in for Outlook
id the add-in:
Download the file by clicking the Download Now button (below)
In the File Download dialog box, click Open (or Run) Follow the instructions on the screen to complete the installation

Click on the Download Now button and then click on Run when the File Download – Security Warning box appears:

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Note: Depending on your computer's settings, you may need to get somebody from an Administration group to install this for you.

After the download starts you may get another security warning box that looks like the following screenshot. Just click on Run again.



You should close PWA and Outlook at this time since the installation will not continue with them open.

The next box you get should look like this:



Microsoft Office Project 2007	Add-in for Outlook	C
Velcome		Ci
Welcome to the Microsoft (Wizard.	Office Project 2007 Add-in f	or Outlook Installation
It is strongly recommended that installation.	t you exit Microsoft Office Outlo	ok before running this
Click Cancel to quit Setup. Click	Install to continue with the Set	up program.

After it installs, you will see the following box:



Open Outlook. You should now see the Project Server Outlook add-in toolbar:



To set your preferences, go to Tools, Options, Project Web Access tab. Determine if you want the Assignments from Project Server schedules to go into your Outlook Tasks or Calendar. Select the time period that you want to use for the Assignments that you import (PWA date range is set by the Administrator and is currently 10 days). Leave the Import and Update options set to manual. Leave both the "Show confirmation…" checkboxes checked.

Click on Advanced Options



	Mail Setup	Mail Formal	Spell	ng Security
Other	Dele	gates	Projec	t Web Access
ntegrate with -				
• Outlook <u>T</u> a:	sks	C	Outlook <u>C</u> ale	ndar
ssignment Import				
Date Range:				
• Project We	b Access date ra	ange		
C Next 2	weeks	*		
Import from Proj	ect Web Access	to Outlook:		
C Every 1	weeks		/ 5 /2009	2 :12:00 PM
I∕ <u>S</u> how confi	mation dialog b	efore importing		
ssignment Updati Update from Out	9 tlook to Project !	Web Access		
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In the Advanced Options determine if you want the Assignments from Project Server to show up on your calendar as Free/Tentative/Busy/Out of Office. I recommend selecting "Free" since the schedule type (fixed duration versus work) might not match your normal method of viewing work. Next, select the method of reminder. I recommend selecting "Follow Outlook's default setting for reminders". Next, click on "Enter Login Information..."

Advanced Options	
Project Web Access Login	
Set your URL and login information	Enter login information
Assignment Import	
Show availability for project assignment a	appointment as: Free
When importing from Project Web Access	s to Outlook:
Eollow Outlook's default setting for	reminders
Never create reminders	
C Always create reminders	inutes 🗾 🗡
Help	OK Cancel



In the login box, enter the PWA URL and the userid that you have entered into Project Professional. Select "Use a Project Server Account".



Select "OK" until you are back to Outlook.

You have now setup the Project Server add-in for Outlook.

The instructions for how the add-in works are in a separate document.