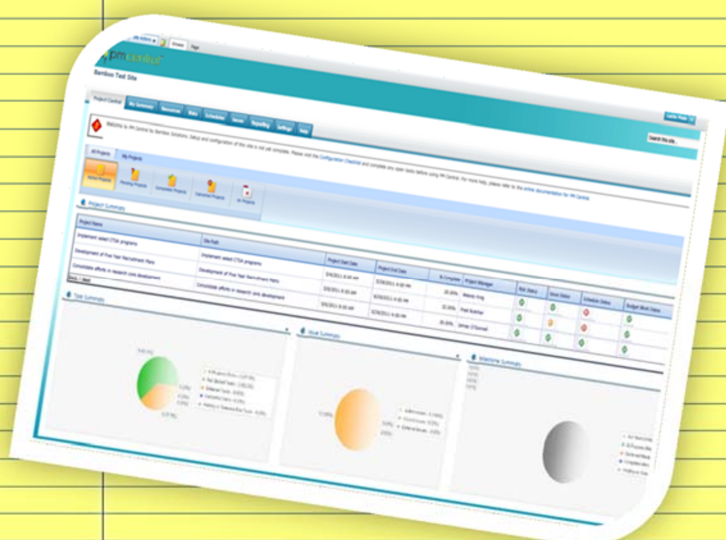
WVU

Robert C. Byrd Health Sciences Center

Office of Institutional Planning

PROJECT MANAGEMENT CENTRAL (PMC) 301

Guide for Project Managers



Fostering a culture of high purpose, accountability & accomplishment

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INTRODUCTION

This manual outlines what you need to know to operate in Project Management Central (PMC) as an effective and efficient Project Manager, regardless of the type of project. Project Managers will be asked to create all tasks in the project management plan, possibly edit tasks during the project execution and manage the entire project along the way.

QUICK NOTES

- Suggested browser for use is Microsoft Internet Explorer 8 or higher
- PMC utilizes Sharepoint 2010, any HS or WVU user can access
- PMC auto authenticates your WVUID inside the network
- Accessing PMC outside of the network requires using Google Chrome

If you wish to use Microsoft Internet Explorer 8 or higher to access at home, please complete the following steps to adjust the default security settings:

1. In IE, go to Tools > Internet Options (or if using IE 9 Click on the settings button then go to internet options)
2. In the box that opens select "security" then click on the green check mark for "Trusted sites" to highlight it.
3. Then select "sites" and in that box we need to enter the following: https://hsccommons.hsc.wvu.edu.
4. Close browser, reopen and visit your project link.
5. When asked to log in, select "use another account", type *HS\username*, and your *password.* It may take a few times to register. Always heck the box to remember credentials

PROJECT CREATION PROCESS

The Office of Institutional Planning has the responsibility of creating all new projects in Project Management Central (PMC). If your project has filtered to us through the HSC Project Approval Process, to create your project, we simply need your project charter. This can be sent to Grace Boyles (geboyles@hsc.wvu.edu). If you do not have a project charter, please read below for the information we need to create your project.

Information Needed to Create a Project

The Office of Institutional Planning requires certain information to create a project in Project Management Central (PMC).

1. Project name
2. Project Manager name
3. Start Date/End Date
4. Project Team Member names

CREATING TASKS

Project managers are responsible for the creation of all tasks in a project.

When creating a new task, you will leave many—if not most—of the default fields blank.

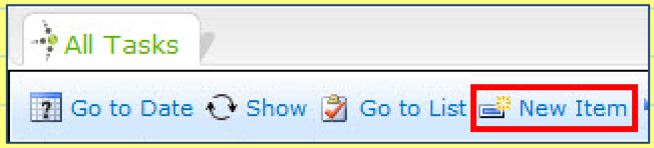
Required Task Fields

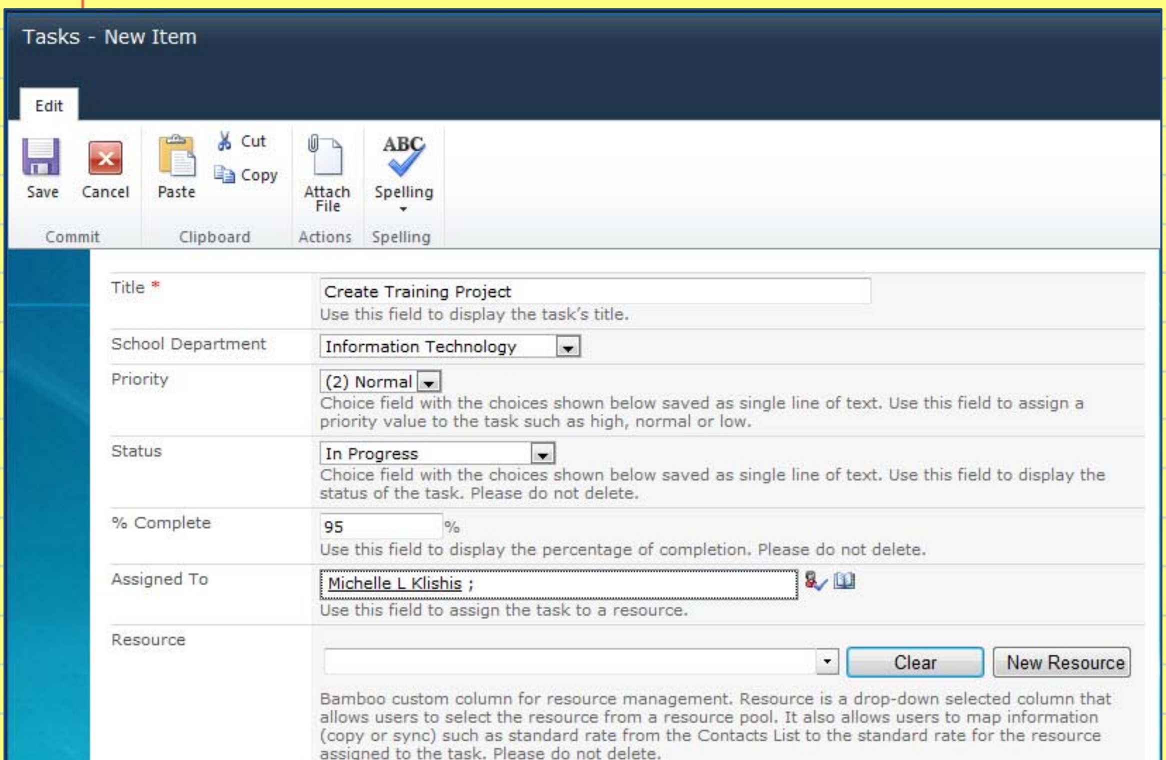
Before you begin to create a task, you should have a general idea about what information you need for each task, specifically the fields below.

Task Title
Priority (High, Medium, Low)
Status (In Progress, Completed, Deferred, Waiting on Someone else)
% Complete (Only if status is In Progress)
Resource (Assignee)
Assignment Units
Start/End Date
Project Department
School Department

Create a New Task

1. Navigate to the the Task Tab, All Tasks View, In the toolbar above the task list, click the **New Item** button.

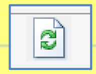




2. The new task dialog opens.

3. Populate the required task fields, found on the previous page. Please see notes below regarding the resource and assignments unit fields.

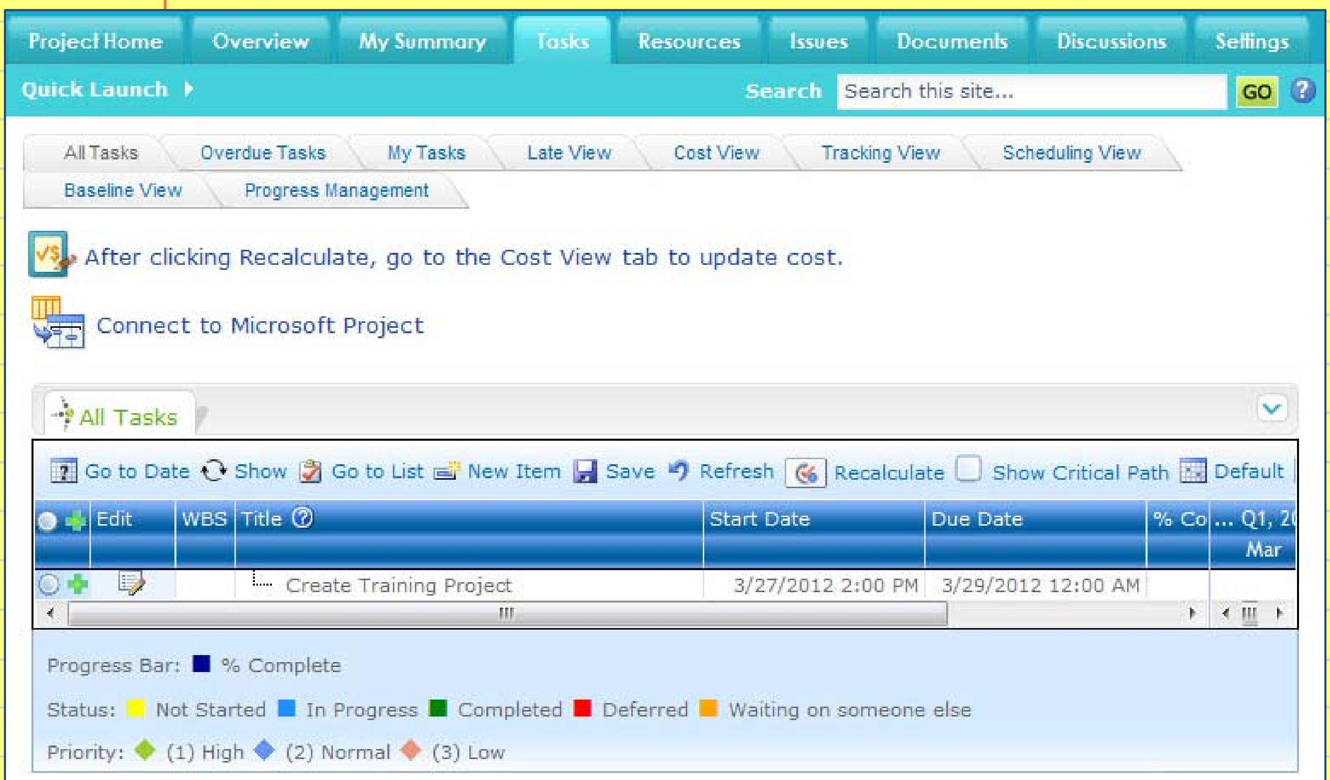
*Resource – Project Managers are only able to assign team members as a resource to a task. Simply move your cursor to the resource field and type the last name of the individual and use the auto complete function to populate. The resource field will auto populate the "Assigned To" field. Only individuals who were added as team members are available to assign to a task. Should you need additional individuals assigned, contact Grace Boyles (geboyles@hsc.wvu.edu).

*Assignment Units – Determines the assigned resource's allocation to a task, such as 50% or 100%. We suggest hitting the  button. This will make the assignment units 100%. Currently, we do not suggest focusing on this %.

*Start/End Date must be M-F, (9am-5pm)

4. Scroll to the bottom of the screen and click the **Save** button.

5. The new task appears in your task list.



Parent & Predecessor Tasks

When creating tasks, you will most likely need to arrange Parent & Predecessor Tasks. This can help you organize a complex project in a very simple way. Both of these tasks are optional task fields you can populate in the task dialog.

<u>Parent Tasks</u> or Summary Tasks are tasks that have children, or smaller steps, that need accomplished before the task as a whole can be officially complete. In

the tasks dialog you can select any task to have a parent task, the only requirement is that the parent task must already be created.

Predecessor Tasks are tasks that must be completed for another task to begin, a dependency task on which the task depends before it can be started or finished. This will link all of your subtasks together to form your Parent or Summary Task.

MANAGING A PROJECT IN PMC

The remaining content has been provided to help you manage your project in PMC once you have already began your project and completed the project management plan in the task tab.

The Benefit of the Recalculate & Save Buttons

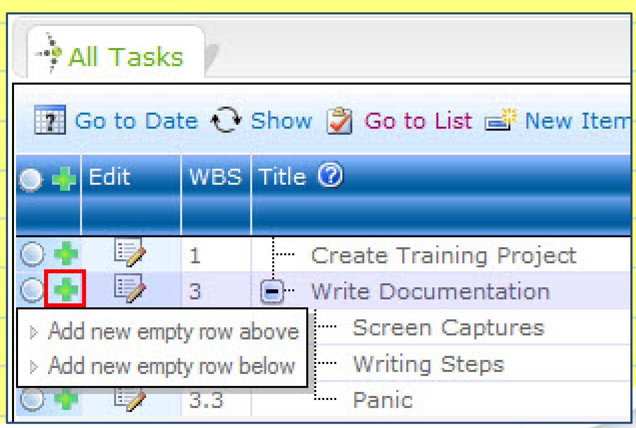
Project Team Members will be updating task progress randomly. As a project manager, you will need to come into the project and update yourself on what has been accomplished recently.

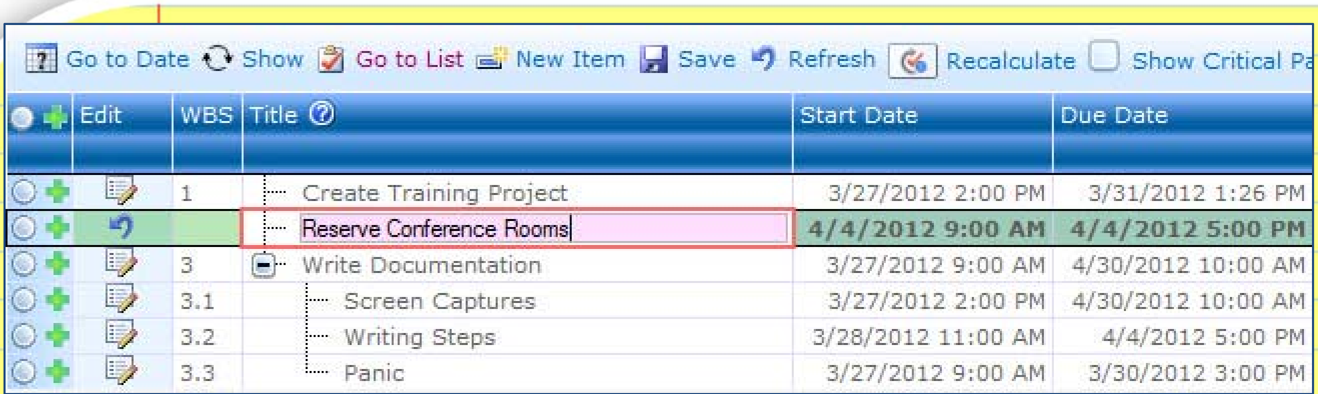
To do this, enter the task tab and select the "recalculate" button. When it reloads, any task that has been modified will appear in blue. Once reviewing the updates, click save. Recalculate will also be the way all Parent tasks and project % Completes are updated.

Inserting a Task between Existing Tasks

Inserting a new task between two existing tasks is a somewhat complicated process. Make sure you follow all the steps carefully.

1. Click the green + near the row where you want to add a task.
2. From the drop down menu, select **Add new empty row above** or **Add new empty row below**.



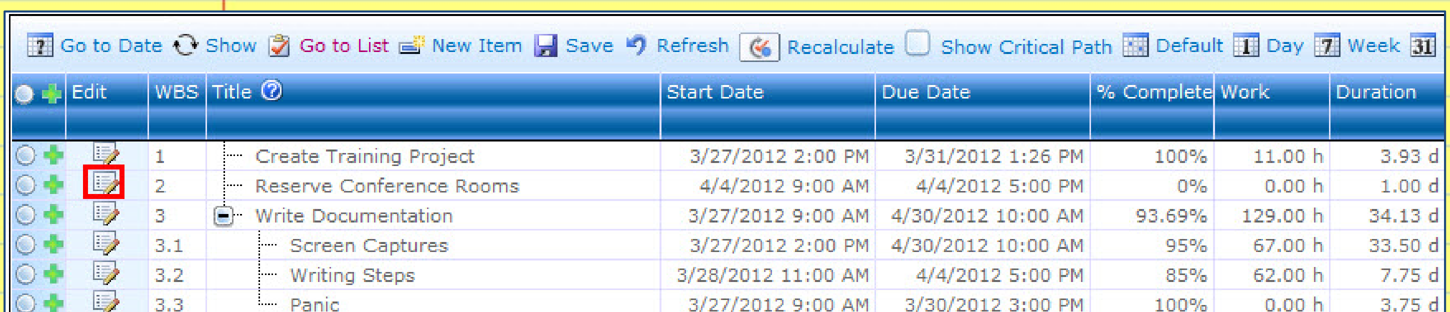


3. Click in the blank cell in the **Title** row. Enter the name of the new task.

4. Click into another cell, such as the Start Date cell.

5. Click the **Recalculate** button.

6. Click the **Save** button.



7. Click the edit button to edit the task and add in needed data.

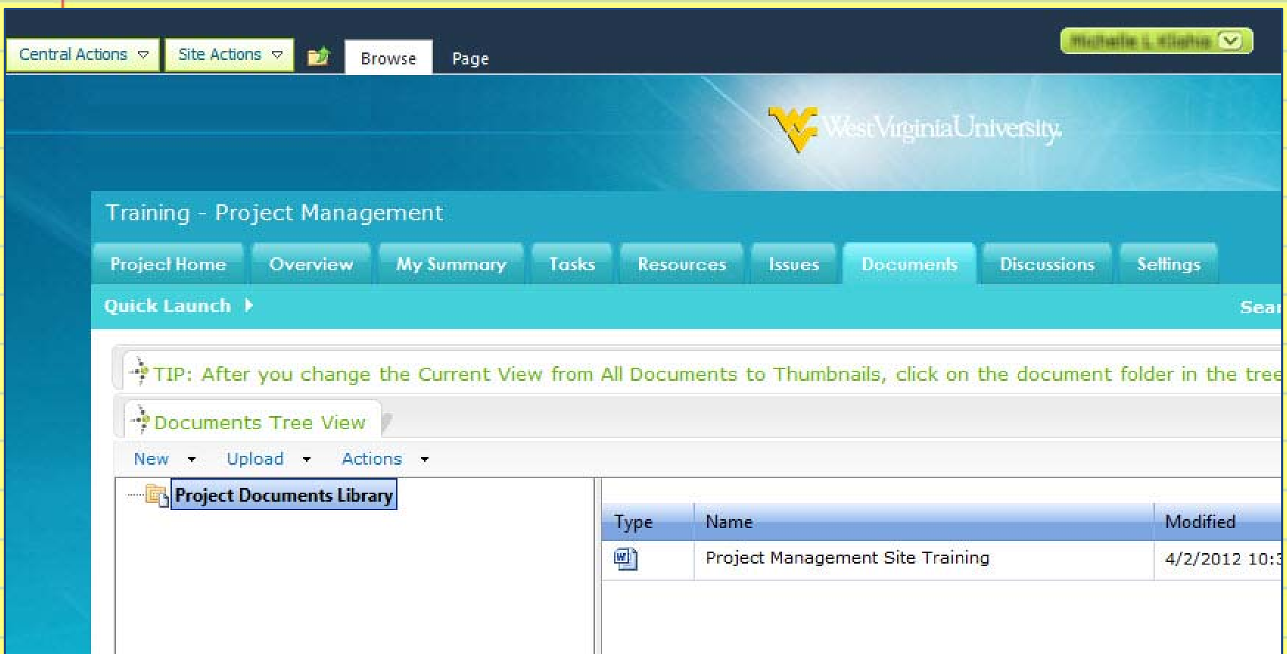
Editing Start/End Dates mid Project

Your first goal as a Project Manager should be to NOT edit task Start/End Dates mid project. Reality and change requests sometimes require that we do this. This can be very confusing.

We suggest setting up dependencies (predecessor tasks) on as many sub tasks as possible. If you do this, changing one end date will ripple through the entire task once you recalculate/save. The alternative option is individually changing each start/end date effected.

Using the Documents Tab

In SharePoint, a library is a collection of files organized into a single folder or series of folders and subfolders. In general, any type of file you can e-mail through Outlook can be placed in a library. In SharePoint, individual files can have unique permissions, for access and modification.



To Open a Library Document

1. On the Dashboard page of your project, select the **Documents** tab
2. In the left pane, select the library that contains your document(s).
3. In the right pane, click on the file you want to open.

Most Office documents will open in the browser view. From here you can view the file, open the file in its associated program, or open the file for editing in the browser view.

To Open a Library Document in Office

1. Hold your cursor over the document you want to open.
2. Click the down arrow beside the document name.
3. Click the link for **Edit in Microsoft (program)**.
4. Click **OK** if warned that the document can harm your computer.

Uploading a Document to a Library

As a general rule, a file that can be sent through the Outlook mail system can be saved to SharePoint. If you are unable to upload a file to a SharePoint library, it may be because that file type is restricted by network administrators.

To Upload a Document to a Library

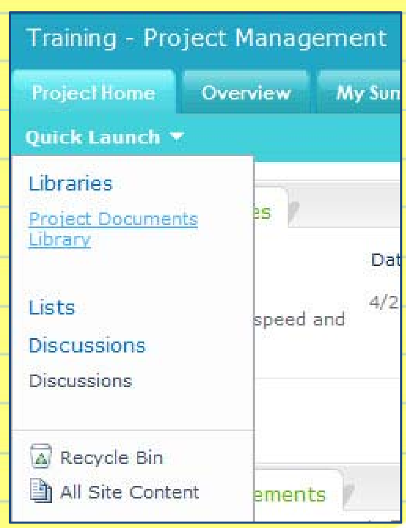
1. Click the **Upload** button.
2. From the drop down menu, select **Upload Document**.
3. In the Upload Document dialog, click the **Browse** button.
4. Select the file to be uploaded.
5. Click **Open**.
6. The document is listed in the **Name** area. Click **OK**.
7. If document check out is turned on, you may receive further prompts. If check out is not turned on, the document should appear in the Shared Documents folder.
8. Set a Title if desired.
9. Click **Save**.

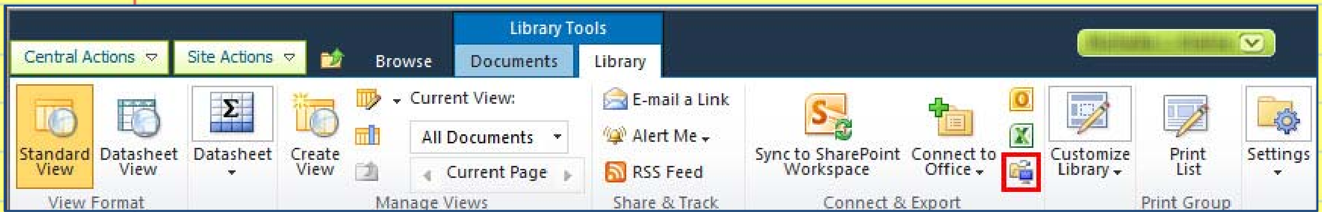
Connecting a Library to Windows Explorer

SharePoint 2010 allows you to link a library to Windows Explorer. This allows you to drag and drop files and folders into SharePoint from your computer and vice versa. You must be using Internet Explorer as your web browser for this to work.

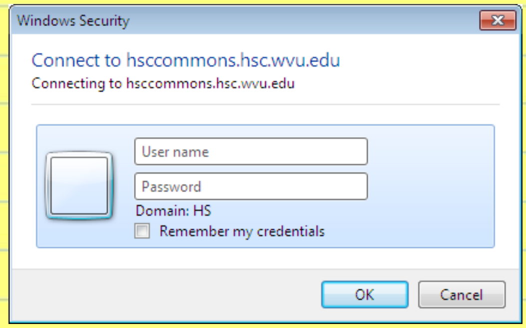
To Link a Document Library to Windows Explorer

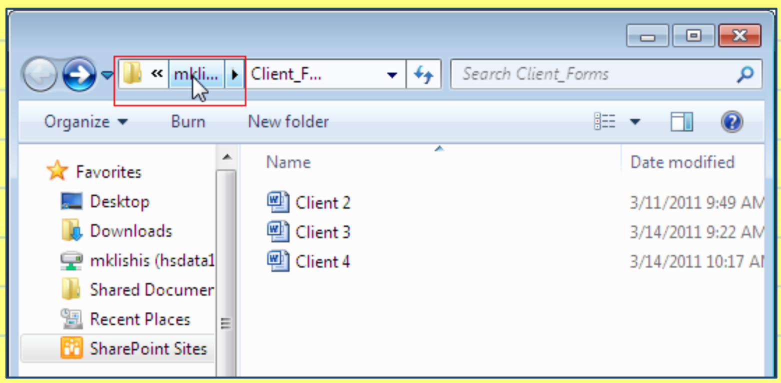
1. Open the document library: Click the **Quick Launch** link. From the drop down menu, select your library.





2. Click the **Library** tab.
3. Click the **Open with Explorer** button.
4. If prompted, in the Windows Security window, enter your user name and password.
5. Place a check in the box beside **Remember my credentials**.
6. Click **OK**.





7. Windows Explorer opens.

8. If you are using Windows 7 or Vista, a quick link to this folder can be added to the Windows Explorer favorites. In the location bar, click the folder to the left of the current folder.

In the main window, drag the folder into the favorites section in the left pane.