



PMP Specialists

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:



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



PMP Specialists



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.

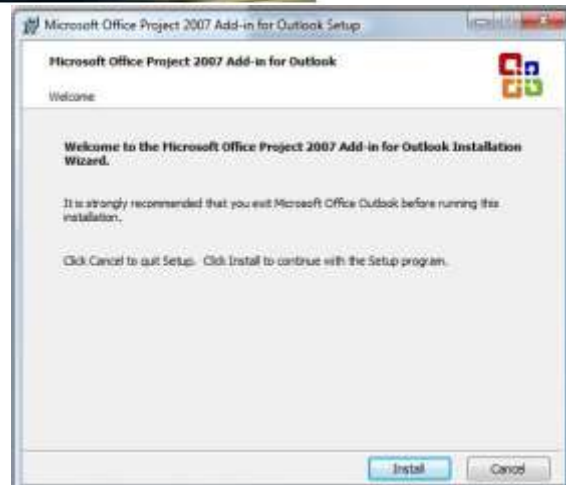


You should close PWA and Outlook at this time since the installation will not continue with them open.

The next box you get should look like this:



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After it installs, you will see the following box:



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

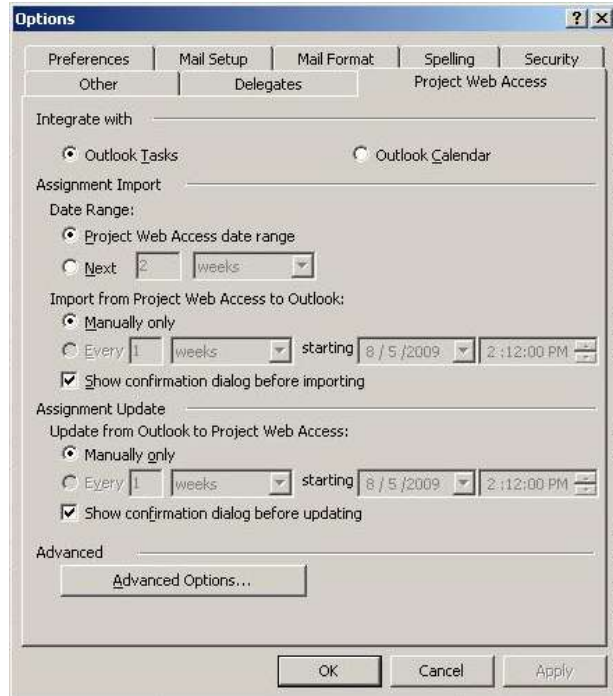


To set your preferences, go to Tools, Options, Project Web Access tab. Determine if you want the Assignments from Project Server schedules to go into your Outlook Tasks or Calendar. Select the time period that you want to use for the Assignments that you import (PWA date range is set by the Administrator 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



PMP Specialists



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...”





PMP Specialists

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

Enter Login Information

Project Web Access URL:
https://project2007 / PWA Test Connection

When connecting

Use Windows user account

Use a Project Server account:
User name: collin.quiring

OK Cancel

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.