CHAPTER

25

Collaborating on Projects with SharePoint

Every project requires communication and collaboration—and usually a lot of both. With small project teams, you and your team members may interact in a variety of ways: talk over cubicle walls, keep track of issues and statuses on your communal whiteboard, send emails or instant messages back and forth, and share files like Word documents and Excel spreadsheets via a network folder or in the cloud. With methods like these, however, the occasional detail might fall through the cracks or you may not hear about an issue until it's out of hand.

If you've outgrown your small project ways (but haven't graduated to needing enterprise-level project-management tools), you may be looking for more tightly-knit team collaboration—a way to share project information with the entire team, to engage team members in solving problems, and to keep everyone in the loop about what's going on with the project.

You might start out by setting up a SharePoint *team site*—a website you and your team members can use to share documents and other project information, track issues, and post status reports. You can also share info about project work by creating SharePoint *Tasks Lists*. That way, team members can see what's on their to-do lists, send progress updates as they complete work, and make changes to tasks. And you can easily check the status of tasks and, if necessary, modify them.

If you're reading *Microsoft Project 2013: The Missing Manual*, chances are you use Project to plan and manage your project schedules. In that case, you may want an easy way to share task info with team members who *don't* use Project. You can create tasks in either a Project file or a SharePoint Tasks List. Then, you can synchronize the tasks between the two programs. This synchronization gives you the best of both worlds: you can use Project's scheduling features while still easily sharing tasks with your team. The updates that team members submit through SharePoint synchronize with your Project file, as well.

NOTE If your organization requires enterprise-level project management (coordinating an entire portfolio of projects and sharing enterprise resources, for example), this simple synchronization feature won't cut it. You need a solution that includes Project Server and SharePoint for those types of project-management activities. In fact, when Project Professional is connected to Project Server, the "Sync with SharePoint" option is disabled on Backstage view's Save As and Share pages.

This chapter explains what you can do with SharePoint and Project, if you don't use Project Server. You'll learn how to share Project files to a SharePoint site. You'll see how to create a Tasks List on a SharePoint site, publish tasks in Project to a SharePoint Tasks List, or convert a SharePoint Tasks List into a schedule in a Project file. This chapter then shows you how to synchronize tasks between Project and SharePoint. Finally, you'll learn how to handle task updates that team members submit.

NOTE The steps in this chapter are based on a SharePoint site created with default settings. However, SharePoint offers numerous options for customizing SharePoint sites, so your site might differ significantly from what you see here. If you can't find a command or element described in this chapter's steps, ask your SharePoint administrator for help.

Sharing Project Info on a SharePoint Site

A SharePoint site is a great way to keep all your project information in one centralized location. This section describes methods for sharing files on a SharePoint site. The box on page 25-7 describes a few other nifty collaboration features you can set up on a SharePoint site.

Saving a Project File to SharePoint from within Project

Say you just added the finishing touches to a Project schedule and want to share the file with your team members via a SharePoint site. If you have the file open in Project, you can save it from there. But before you can do that, you need to add your SharePoint site as a Save As location in Project. Here are the steps:

1. **Choose File→Save As.**

   Backstage view's Save As page appears.

2. **Click "Add a Place," and then, on the right side of the page, click your SharePoint location.**

   The SharePoint location label varies depending on how you access SharePoint. For example, if you use SharePoint through an Office 365 account, you'll see Office 365 SharePoint in the location list.

3. **In the "Add a service" dialog box, type the email address you use to log into SharePoint, and then click Next.**

   The Sign In dialog box appears, with the email address you typed in the User Id box.

4. **Type your password in the Password box, and then click "Sign in."**

   An Add Service message box tells you that the SharePoint location is being added to your Office account. After Office adds the location, the SharePoint site appears in your "Save and Sync" list, as shown in Figure 25-1.

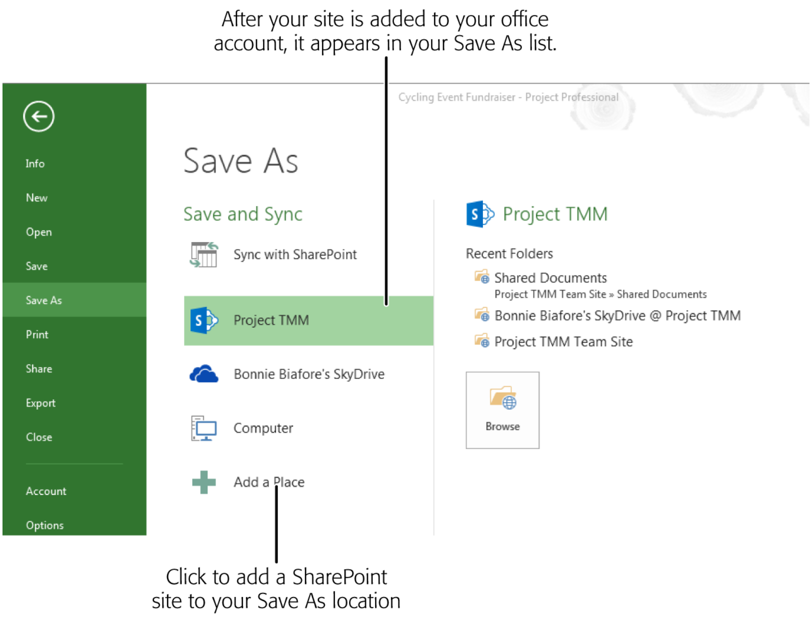

FIGURE 25-1

After you click "Add a Place" and sign in to access your SharePoint site, it appears in the "Save and Sync" list. From then on, you can click the site's name (here, that's Project TMM) to navigate to folders on the site.

Once your SharePoint site is set up as a save location in Project, you can add a Project file to the site in a jiffy. Here's what you do:

1. **Make sure that the file you want to upload to SharePoint is the active file in Project.**

   A quick way to see which file is active is to look at the filename in the Project window's title bar.

2. **Choose File→Save As, and then click the SharePoint site's name in the "Save and Sync" list.**

   The site's folders that you've opened recently appear on the Backstage Save As page's Recent Folders list, as shown in Figure 25-2 (background).

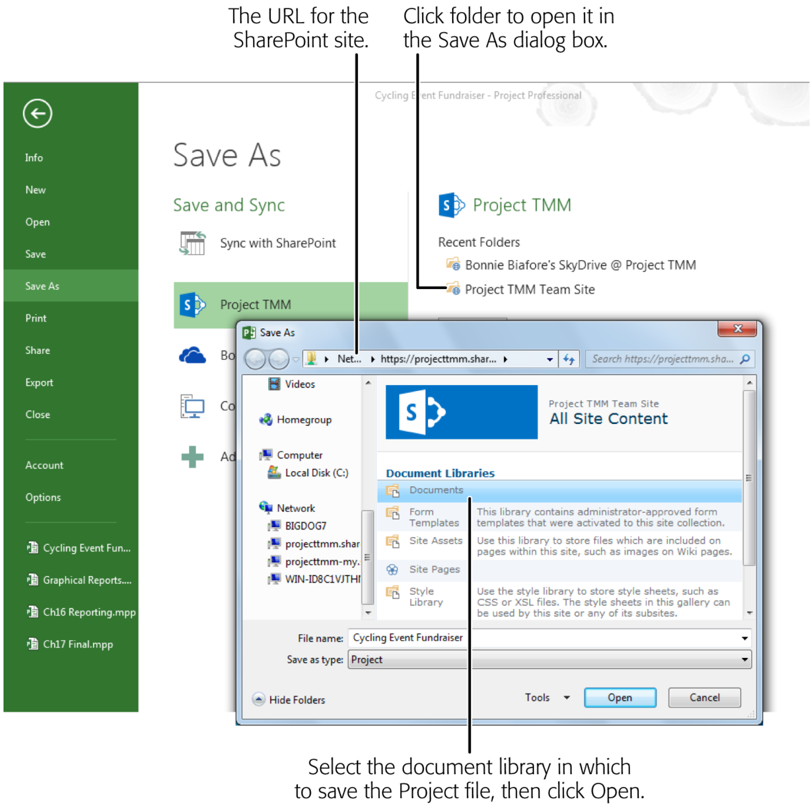

FIGURE 25-2

If the site folder you want appears in the Save As page's Recent Folders list, click it to open the Save As dialog box to that folder. In the Save As dialog box (foreground), select the document library you want to save the file to.

3. **To open a recent folder, click its name. If the SharePoint site folder you want isn't visible in the Recent Folders list, click Browse instead.**

   Either way, the Save As dialog box opens to your SharePoint site (Figure 25-2, foreground).

NOTE Depending on the speed of your Internet connection, you might see a message box telling you that Project is contacting the server for information.

4. **In the Save As dialog box, select the document library in which you want to save the file, and then click Open.**

   The Save As dialog box displays the contents of the *document library*, which is basically a collection of files in a digital repository.

5. **In the Save As dialog box, click Save. (If you want to save the file with a different name, edit the name in the "File name" box first, and *then* click Save.)**

   Project saves the file to your SharePoint site.

Adding Files to a SharePoint Site within SharePoint

Storing files on a SharePoint site makes it easy to share your files with others. As long as they have access to the SharePoint site, they can download the files stored there. A SharePoint site comes in handy in other ways. Imagine you travel to another office and your laptop dies en route. You can borrow a computer, go online, download the files you need from the SharePoint site, and continue working with a minimum of interruption.

You can upload any kind of file to a SharePoint site: Project files, Word documents, Excel spreadsheets, images, and so on. Here's how:

- **Upload a document.** You can add a document to a SharePoint team site right on its Home page. (You can also work with documents on the site's Documents page. To get there, on the Home page's left, click Documents.) Click the "new document" link and then choose Upload Existing File from the pop-up menu shown in Figure 25-3. In the "Add a document" dialog box, click Browse, select the file you want to upload, and then click Open. (You can also drag and drop the file you want to upload onto the "new document" link to add it to the site.) Once the file is uploaded, it appears in the Documents list with the date and time it was last modified and who modified it.

- **Download a document.** To download a file to your computer, first click its filename in the Documents list to open it. Next, in the Web App's menu bar, click File→Save As, and then click Download. In the File Download dialog box, click Save. Finally, in the Save As dialog box, navigate to the folder you want, and then click Save.

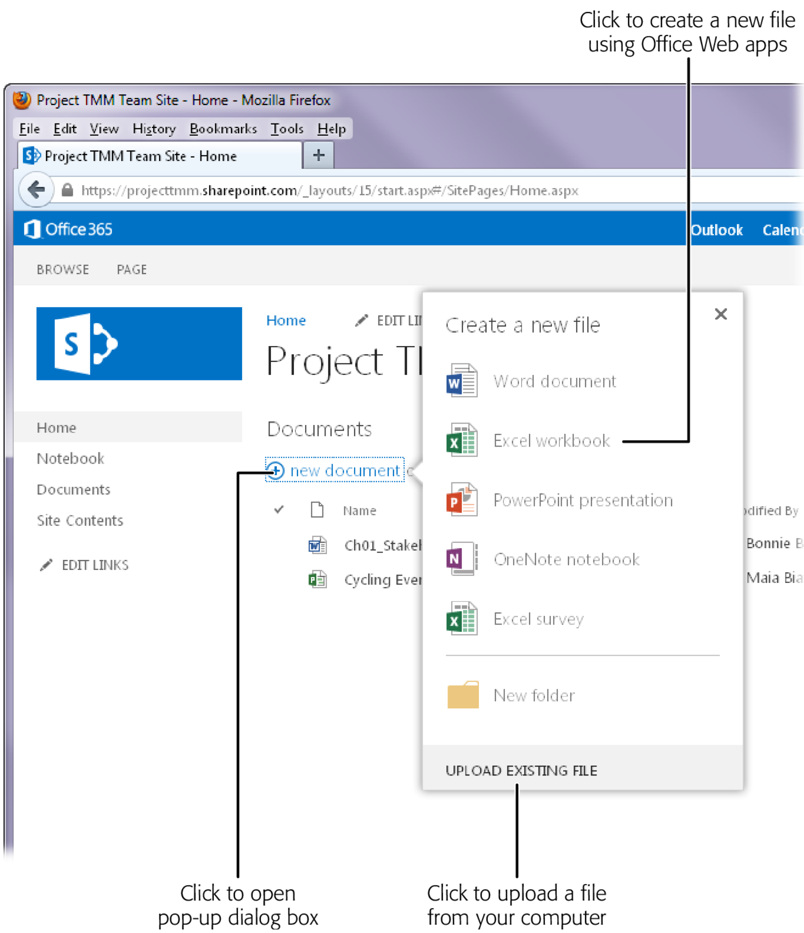

FIGURE 25-3

You can upload or open documents from the SharePoint site's Home page (shown here) or Documents page. Click the "new document" link to upload an existing file or create a new one. Once a file created with an Office application is uploaded, you can open it in the corresponding Web App by clicking its name in the Documents list.

TIP Opening a file created with an Office application (like Word and Excel) is as simple as clicking its filename in the Documents list, which opens the file in the corresponding Office Web App. For example, when you open a Word document, Microsoft Word Web App launches. On the Edit Document tab, choose "Edit in Word" if you want to take advantage of all the editing features Microsoft Word has to offer. For a few simple edits, choose "Edit in Word Web App" to edit the document in your browser instead.

POWER USERS' CLINIC

Revving Up Your SharePoint Site

Keeping project information organized and up to date is even easier when you use SharePoint in conjunction with other programs like Outlook, Exchange, or Lync. (Lync is a Microsoft product for communicating via instant message, video conference, online meeting, and other methods.) Here are a few of the integrated features you might want to explore:

- If you use Outlook and Exchange, you can set up a **site mailbox** to file all your project emails and documents. All the team members for the SharePoint site or project share the site mailbox's email address. So if a team member files an email message or document using the site mailbox, that message or document is available to *all* team members. However, the messages and documents are still stored in their original locations. For more info on site mailboxes, head to *http://tinyurl.com/stmbx*.
- If you use Outlook and Exchange, you can **sync tasks** (Project tasks or personal tasks in Outlook) between Project, SharePoint, and Outlook. That means, you can mark tasks as complete in any of the three programs, and the tasks' statuses propagate to the other programs. Learn more about this task integration at *http://tinyurl.com/tskint*.
- If you use Lync to communicate with team members, you can **message or call** them from within Project to follow up on status. To do that, put your pointer over the person's name in the Resource Name field and a Lync pop-up box appears, showing the person's status in Lync, such as Away. Click the appropriate icon to send an instant message, call, initiate a video chat, or send an email. Head to *http://tinyurl.com/lyncint* to see how this Lync integration works.

NOTE To learn how to put SharePoint through all its paces, check out *Microsoft SharePoint 2013 Plain & Simple* by Johnathon Lightfoot, Michelle Lopez, and Scott Metker (O'Reilly).

Setting Up Tasks on a SharePoint Site

In SharePoint, a Tasks List is like a simple project plan with task names, start and finish dates, and so on. If you're putting together a to-do list and don't need all of Project's bells and whistles, a SharePoint Tasks List might be just the ticket. You can assign team members who are part of the SharePoint site to tasks. You can organize tasks into an outline with summary tasks and subtasks; view start and finish dates; and show progress. You can also use a SharePoint Tasks List to brainstorm with your team. This section shows you how to create a SharePoint Tasks List within SharePoint.

NOTE Once you add tasks to a Tasks List in SharePoint, you can also pull them into Project to build a schedule (page 25-18). In addition, you can publish a list of tasks that you built in Project to a SharePoint Tasks List for all to see (page 25-17).

Creating a Tasks List

To work with tasks on a SharePoint site, you need a Tasks List to hold them. In SharePoint 2013, you add the Tasks app to create a new Tasks List. (Similar to apps on mobile phones, SharePoint apps are mini-applications that expand what you can do with SharePoint.) Here's how:

1. **On the left side of the SharePoint site's Home page, click Site Contents, and then, on the Site Contents page, click "add an app."**

   The Site Contents page displays several popular apps.

2. **Click the Tasks button.**

   The Adding Tasks dialog box appears.

3. **In the Name box, type a name for the Tasks List, such as Catering Vendor Tasks, and then click Create.**

   The Site Contents page now includes a button for the Tasks List. The button's label displays the name you entered for the list, as shown in Figure 25-4.

That's it! If you want to create another Tasks List on the site, simply start anew at step 1.

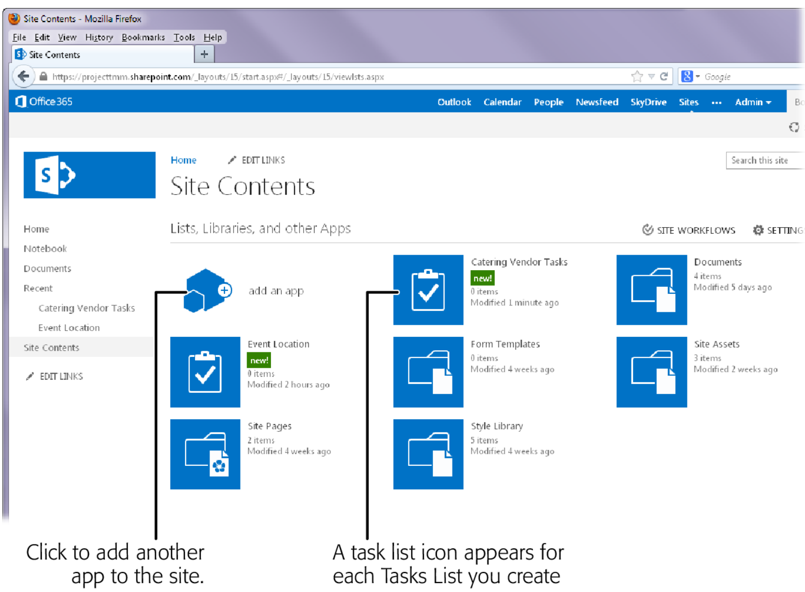

FIGURE 25-4

You add another Tasks app to the site for each Tasks List you create. The name you enter when you create a Tasks List appears to the right of the Tasks List's icon (which looks like a checkmark on a clipboard—reminiscent of a to-do list that you check off). You can make your Tasks Lists easier to identify by including the word "tasks" in their names.

NOTE There's a shortcut for adding both a Tasks app and a Calendar app to your site (which you might want to do if you and your teammates prefer to look at your project work in a calendar view). On your SharePoint team site, click the "Working on a deadline?" icon. (If you don't see this icon, click the gear-like Settings icon at the top right of the page, and then click Getting Started.) A dialog box containing a "Tasks (with a timeline)" and a Calendar icon appears; click Add Them.

Adding Tasks to a Tasks List

Once you've created a Tasks List, it's time to add tasks to it. SharePoint 2013 Tasks Lists can be simple to-do lists or more sophisticated lists that include summary tasks and subtasks (page 25-14). In addition, you can link tasks (page 25-10) to one another to define predecessors and successors for a schedule.

Here are the steps for adding tasks to a Tasks List:

1. **On the left side of the site, click Site Contents, and then click the Tasks List you want to work on.**

   The Tasks List's page opens with the Tasks List's name at the top and a timeline below it.

2. **On the Tasks List page, click "new task"**

   A task form appears with several commonly-used fields, such as Task Name, Start Date, Due Date, and Assigned To.

3. **In the Task Name cell, type the task's name, and then press Tab.**

   The Start Date box's border is highlighted to indicate that it's active.

4. **Click the Calendar icon to the right of the Start Date box, and then choose the start date for the task. Alternatively, type the date in the box. Then, press Tab.**

   The Due Date box becomes active.

5. **Enter the date that the task is due in the Due Date box, and then press Tab.**

   The Assigned To box becomes active.

6. **To assign someone to the task, start typing the person's name or email address in the Assigned To box, and then click the name you want in the drop-down list.**

   As you type, the Assigned To drop-down list shows matching names from the people who belong to the site, as shown in Figure 25-5.

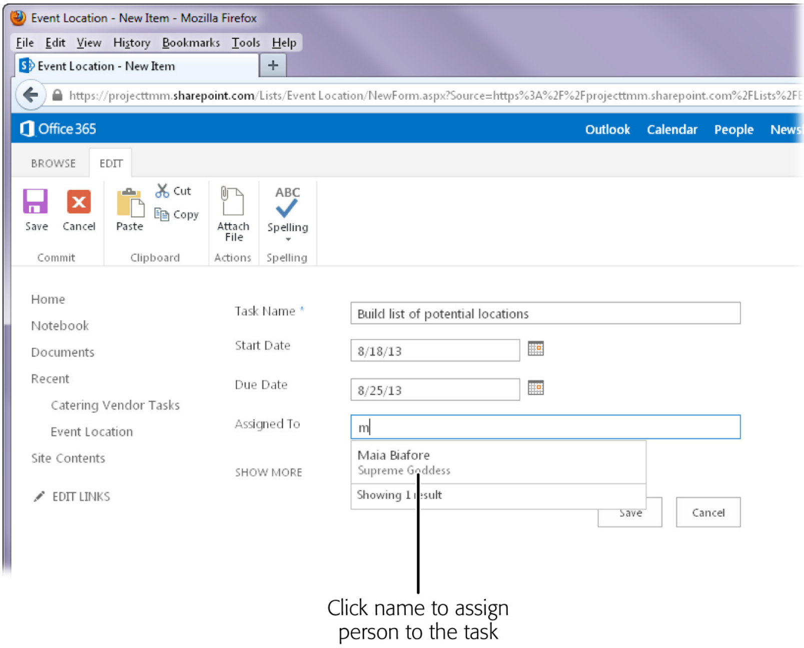

FIGURE 25-5

The Task Name field is the only field you have to fill in. To display additional fields, click Show More below the Assigned To label.

7. **If you want to link the task to other tasks in the list, click Show More at the bottom of the page. In the Predecessors list box that appears, choose the predecessors to the task, and then click Add.**

   The predecessor task appears in the list box on the right. To remove a predecessor, click the task in that list box, and then click Remove.

8. **Click Save.**

   The task appears in the Tasks List, as shown in Figure 25-6. (The box on page 25-12 tells you how to add a task to Timeline view in SharePoint.)

9. **To add another task, repeat steps 2 through 8.**

   Page 25-12 describes how to add multiple tasks to a table.

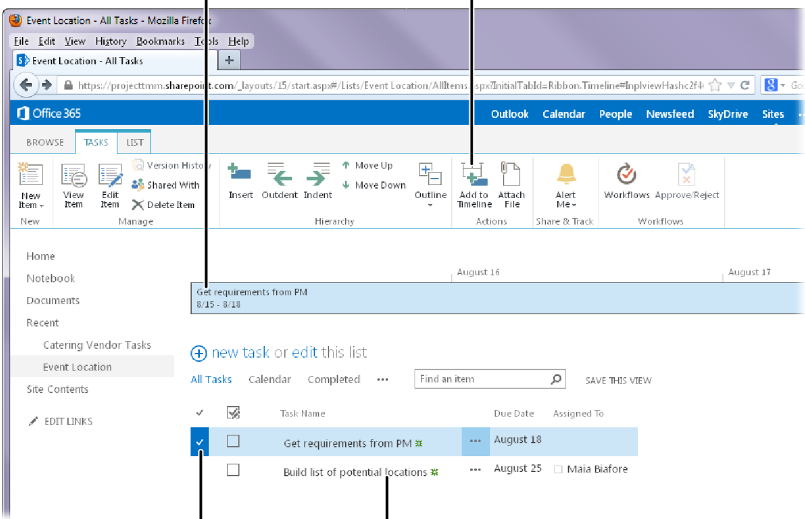

FIGURE 25-6

When you save a task, it appears in the Tasks List below the timeline. If you add a task to the timeline, its name and date range appear in the timeline at the top of the page. Tasks don't appear on the timeline unless at least one date field has a value. If you want to change the task's appearance in the timeline, click the timeline. When you do that, the ribbon displays the Timeline tab (not shown here), which has features similar to Project 2013's Timeline tab.

TIP Say you want to rearrange tasks to put them in a different order. First, select the task you want to move: to do that, put your cursor to the left of the task's checkbox, and then click the checkmark that appears. Then, in the ribbon, click the Tasks tab. In the Hierarchy section, click Move Up or Move Down until the task is in the position you want.

UP TO SPEED

Adding a Task to SharePoint's Timeline View

Thanks to the growing sophistication of Web Apps, the SharePoint 2013 Tasks app offers many features that are available in Project 2013, like Timeline view (page 619). For an overview of what's happening when, Timeline view can't be beat. You can add key tasks to Timeline View as bars or callouts. Here's how:

1. With the Tasks List page open, in the ribbon, click the Tasks tab. It contains commands that help you create new tasks, indent and outdent tasks into an outline, attach files to tasks, and so on.
2. Put your cursor to the left of the task's checkbox to see the selection checkmark. When the checkmark appears, click it to select the task. Sharepoint shades the background of the selected task's row. A checkmark appears to the left of the task's row, and the checkmark's background is shaded a darker hue.
3. In the Tasks tab's Actions section, click "Add to Timeline."
4. The task's name and date range appear in the timeline, as shown in Figure 25-6.

Adding, Editing, and Organizing Multiple Tasks

Opening a separate page each time you want to add or edit a task gets old quickly. With SharePoint 2013, you can edit several tasks right there on the Tasks List page. You can also indent and outdent tasks to create a hierarchy like the ones you've probably built in Project; or you can move tasks to reorder them. SharePoint 2013 also lets you change the way tasks are displayed. For example, you can display tasks in Gantt Chart view to look at the schedule. This section explains all those techniques.

EDITING MULTIPLE TASKS

Initially, the fields in the list of tasks aren't editable. To edit a task, you have to click its name to open the page with its info, and then, in the ribbon's View tab, click Edit Item. That's a lot of clicks to make a simple edit or two.

If you need to edit several task fields for several tasks, Quick Edit view makes editing much more efficient. Here's how you edit tasks in Quick Edit view:

1. **On the Tasks List page, above the column headings, click "edit."**

   The Tasks List switches to a table that looks and acts a lot like an Excel spreadsheet, as shown in Figure 25-7.

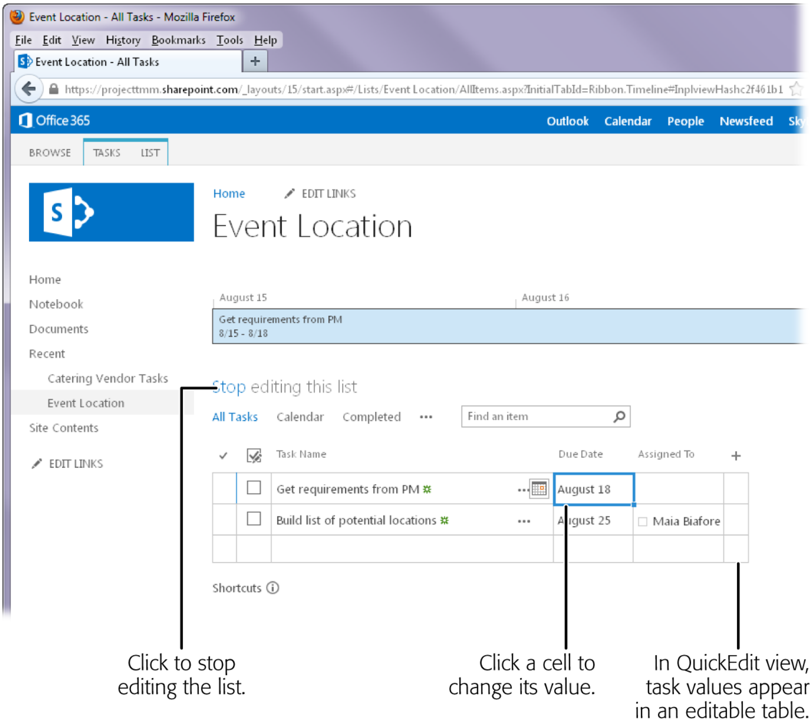

FIGURE 25-7

Clicking "edit" on the Tasks List page (not shown here) switches the Tasks List to Quick Edit view. Task values are displayed in a table, so you can click the cell you want to edit, and change its value right there. When you're finished editing, click Stop, and the Tasks List switches back to the standard list view.

2. **Click a cell, and then edit its value.**

   SharePoint outlines the selected cell with a bold border.

3. **Repeat step 2 to edit other cells in the table.**

   If you click a cell in a different row, SharePoint saves the edits you made to the task in the row you just clicked away from.

4. **When you're finished editing, click Stop above the column headings.**

   The table disappears and the tasks revert to a read-only list.

ORGANIZING A TASKS LIST INTO SUMMARY TASKS AND SUBTASKS

For all but the smallest of projects, a work breakdown structure helps keep tasks organized. By grouping subtasks beneath summary tasks, it's easier to identify the work that needs to be done and how much of that work is complete (page 123). You can organize tasks in this same way in SharePoint. Although the steps are slightly different than the ones in Project, the resulting hierarchy is similar.

To organize your Tasks List, first open it (click Site Contents and then click the icon for the appropriate Tasks List). Above the Tasks List, click "edit." SharePoint switches to Quick Edit view (page 25-12). Here's how you work with summary tasks and subtasks in a SharePoint Tasks List:

- **Change a task into a subtask.** In your Tasks List, put your cursor over the subtask's name, and then click the checkmark that appears to the task's left. In the Tasks tab's Hierarchy group, click Indent. SharePoint indents the selected task, and turns the task above into a summary task, as shown in Figure 25-8. You can expand and collapse summary tasks to show or hide their subtasks. Just like you do in Project, click the black triangle to the left of a summary task's name to hide its subtasks; click the white triangle to the left of a collapsed summary task to show its subtasks.
- **Outdent a task.** In your Tasks List, place your cursor over the subtask's name, and then click the checkmark that appears to the task's left. Then, in the Tasks tab's Hierarchy group, click Outdent. SharePoint moves the selected task up one level in the hierarchy. If the task above was a summary task, it changes back to a regular task.
- **Create a new subtask under another task.** Click the ellipsis to the right of the summary task's name. On the menu that appears, click Create Subtask.

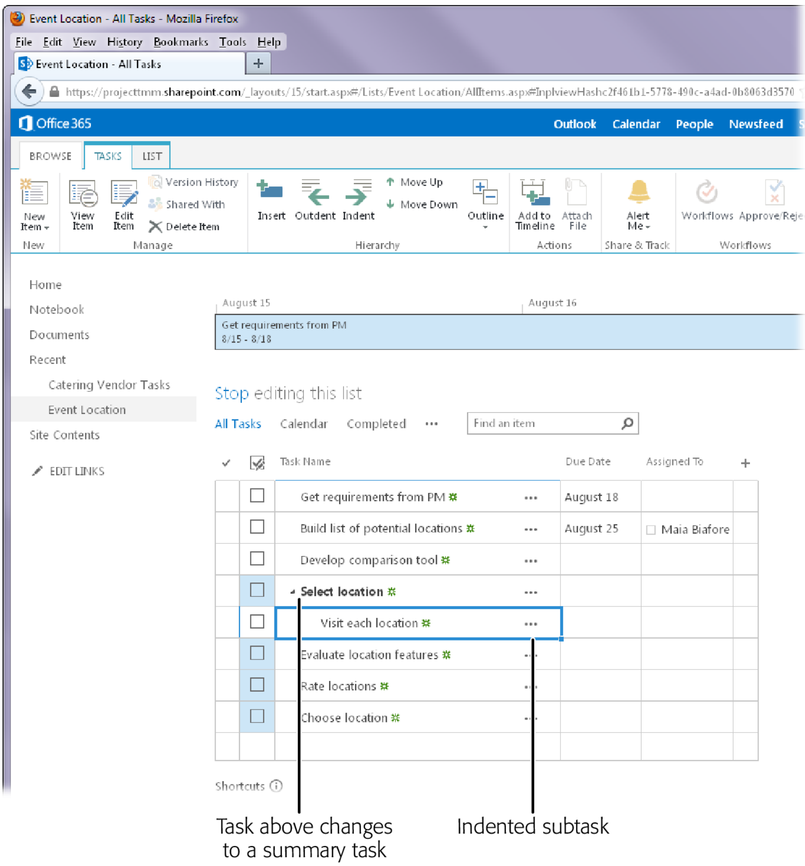

FIGURE 25-8

The summary task's name is bolded and a black triangle appears to its left, just as it does in a Project 2013 summary task. Click this triangle to hide the summary task's subtasks.

WORKING WITH SHAREPOINT TASK VIEWS

SharePoint task views let you control how your tasks appear. For example, you can display tasks in Gantt Chart view or choose Upcoming to filter the Tasks List to show the tasks that are on deck. Here are some of the things you can do with views in SharePoint 2013:

- **Apply a different view to your Tasks List.** Click the ellipsis to the left of the "Find an item" box, and then choose the view you want. If you choose Gantt Chart, you'll see a Gantt Chart view similar to the one in Project 2013. (It has a table with column on the left and a timescale on the right. The table in Gantt Chart view works much like the one in Project, so you can edit values directly in cells.)

- **Modify a view.** To modify the current view, click the ellipsis, and then, choose "Modify this View." The Settings→Edit View page that appears includes view settings similar to the ones in Project 2013: the columns to include and their order, sorting, filtering, grouping, and so on. The main difference is that you choose the settings in a web page instead of a dialog box. Page 25-19 describes how to add additional columns of information to a view.
- **Create a new view.** To create a view from scratch, click the ellipsis, and then, choose "Create View." On the Settings→View Type page that appears, choose the type of view you want, such as Standard View for the read-only Tasks List, Datasheet View for an editable table, or Gantt View for the old standby Gantt Chart presentation.

Exchanging Task Info Between Project and SharePoint

Project and SharePoint Tasks Lists play well together up to a point. (The box below explains the limitations to the Project-SharePoint Tasks List relationship.) You can publish tasks in a Project file to a SharePoint Tasks List or take tasks in a SharePoint Tasks List and add them to a Project file.

Once you set up that initial connection between a Project file and a SharePoint Tasks List, you can synchronize the info they contain so it appears in both places. That way, the entire team can see what's going on with the project at all times. This section explains how to do that.

GEM IN THE ROUGH

Tasks Lists Have Their Limits

SharePoint doesn't have the scheduling prowess that Project does. So before you synchronize your Project with SharePoint, see whether SharePoint's features satisfy your needs:

- **Task start and finish dates are set with date constraints.** SharePoint can't calculate project schedules, so tasks you synchronize appear in SharePoint Tasks Lists as manually scheduled (page 60). In Project, the tasks are still set to Auto Scheduled mode, but the task dates include partially inflexible date constraints like Finish No Later Than. That means you have to manage links between tasks as dates change, and resolve any resource overallocations that occur.
- **Resources assigned to tasks must be members of the SharePoint site.** The only resources you can see in a SharePoint Tasks List are people who are members of the SharePoint site. If you assign *other* resources to tasks, the Assigned To values for those tasks are blank. However, the resource assignments still exist in your Project file.
- **Custom fields that use formulas don't synchronize.** On the bright side, custom fields *without* formulas do synchronize to SharePoint. See page 25-20 for info on adding fields to a SharePoint Tasks List.

Creating a SharePoint Tasks List from a Project File

If you build a project schedule in Project, chances are you want to share that schedule with your team, so they can see what they're supposed to do and what's happening in the project. Publishing your schedule to a SharePoint Tasks List makes your project tasks easily accessible on a SharePoint site (as long as the limitations described in the box on page 25-16 are acceptable to you.) Here's how you publish tasks in a Project file to a SharePoint Tasks List:

1. **Open the Project file you want to publish to SharePoint, and then choose File→Save As→"Sync with SharePoint."**

   The "Sync with SharePoint Tasks List" fields appear to the right of Backstage view's Save As page.

2. **To create a *new* SharePoint site for the project, in the "Sync with" box, keep New SharePoint Site selected. In the "Project name" box, type the project name you want to use for the site. And in the "Site address" box, type the URL for the SharePoint site to which you want to add the project site, as shown in Figure 25-9. Then, skip to step 6.**

   If you've added the SharePoint site to your Project Save As locations (page 25-2), you can click the down arrow in the "Site address" box, and then choose the SharePoint site URL. The program appends the project name to the SharePoint URL to create the project site address. For example, if the SharePoint URL is *https://projecttmm.sharepoint.com* and the project's name is Fundraiser, then the project site address becomes *https://projecttmm.sharepoint.com/Fundraiser*.

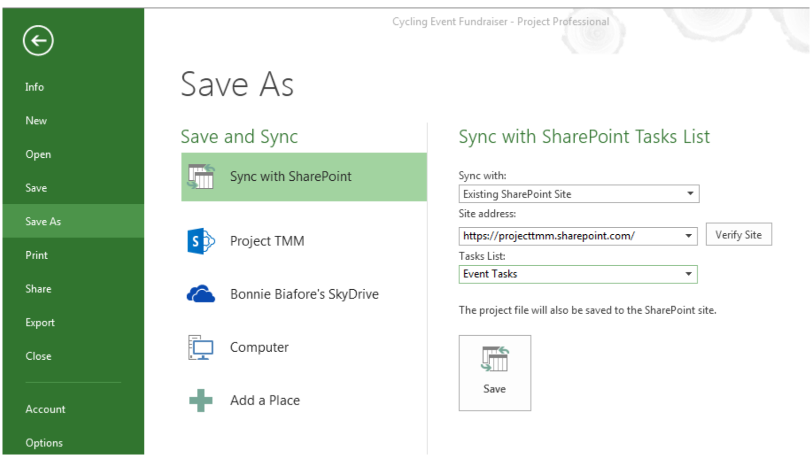

FIGURE 25-9

When you fill in a SharePoint site address and click Verify Site, Project connects to the site, and then populates the Tasks List drop-down list with the existing Tasks Lists.

3. **To sync with an *existing* SharePoint site, in the "Sync with" box, click the down arrow, and then choose Existing SharePoint Site (see Figure 25-9).**

   If you choose this setting, you don't have to enter a project name, because the SharePoint site already has a name.

4. **In the "Site address" box, type the existing site's SharePoint URL. Alternatively, click the down arrow, and then, in the drop-down list, choose the SharePoint site you want.**

   Don't include the name of the Tasks List in the URL.

5. **Click Verify URL.**

   Project connects to the site and retrieves the names of its Tasks List.

6. **In the Tasks List drop-down list, choose the Tasks List you want to sync the Project file to.**

   The Tasks List drop-down list contains existing Tasks Lists from the site you verified.

7. **Click Sync.**

   A "Sync with Tasks List" message box keeps you posted on the synchronization process. If any of the resources you've assigned to tasks don't exist within the SharePoint server, a warning tells you that those resources won't be published. Click OK to continue. Although you won't see the resource names in the SharePoint Tasks List, the assignments remain in your Project file.

Your Project tasks are now published to the SharePoint site. You can see them by navigating to the SharePoint site in your browser.

Saving a SharePoint Tasks List to Project

Creating a list of tasks on a SharePoint site is an easy way to start a project schedule. For simple projects, creating and managing tasks on the SharePoint site may be enough. But if your simple project morphs into something bigger, you can save your SharePoint Tasks List to Project, and then use Project's more comprehensive tools to keep the schedule under control.

Here are the steps for saving a Tasks List to Project:

1. **Open the Tasks List you want to save to Project by clicking Site Contents on the SharePoint site Home page, and then clicking the icon for the appropriate Tasks List.**

   If you opened the Tasks List recently, you can click its name below the Recent heading on the page's left.

2. **In the ribbon, click the List tab. Then, in the Connect & Export section, click "Open with Project."**

Project 2013 launches and displays the tasks from the SharePoint Tasks List in a new Project file. (If you have an earlier version of Project installed, a message box tells you that you need Project 2013.)

3. **Click Save.**

   A "Sync with Tasks List" message box tells you the progress it's making. When the synchronization is complete, the tasks from SharePoint appear in the current Project view.

From now on, you can synchronize any changes you make in Project or SharePoint, as described in the next section.

Synchronizing Changes

When you connect a Project file and a SharePoint Tasks List, the process includes an initial synchronization that sends the info from one program to another. For example, if you publish a Project file to a SharePoint Tasks List, the synchronization pushes the tasks in Project into the SharePoint Tasks List. As you know all too well, a project is dynamic, so you'll want to synchronize future changes, whether they occur in Project or SharePoint. Fortunately, synchronizing is easy: once your Project file is connected to a SharePoint Tasks List, you can sync the two simply by saving the Project file within Project (choose File→Save). Or you can choose File→Info, and then click Save.

NOTE If you and someone on your team both modify the same field—one in Project and the other in SharePoint—when you go to synchronize, Project will display a Conflict dialog box, which includes a Microsoft Project Fields column and a SharePoint Fields column. The fields whose values differ between the two are highlighted. For each conflict, you need to specify whether to keep the value from Project or SharePoint. To keep a value from Project, in the conflict's Version column, click the down arrow and then choose Microsoft Project Version. To use the value from SharePoint, click the down arrow, and then choose SharePoint Version instead. After you've specified which version to keep for all the conflicts, click the Continue Sync button.

Managing the Fields in a SharePoint Tasks List

Once a connection exists between a Project file and a SharePoint Tasks List, you can specify the fields that appear in the Tasks List. For example, you can add the WBS field, a cost field, or a custom field to the SharePoint view. (The box on page 25-22 tells you why adding the WBS field can be helpful.) Here's how to sync additional fields to a SharePoint Tasks List or edit the settings for existing fields:

1. **In Project, choose File→Info.**

   Once a Project file is linked to a SharePoint Tasks List, the Info page includes a Save button with the label "Save and Sync Your Project." In addition, you can see when the file and the Tasks List were last synchronized, as well as the site address and the Tasks List that the Project file is synced to.

2. **Below the "Save and Sync Your Project" information, click Map Fields.**

   The Map Fields dialog box opens, showing the fields in the Project table and in SharePoint. A checkmark in the Sync column indicates that the corresponding field synchronizes between the two programs. In the dialog box, some fields are grayed out to indicate that you can't change whether they synchronize. For example, the Name, Start, Finish, % Complete, Resources Names, and Predecessors fields are automatically synchronized.

3. **To add a field, click Add Field. In the Add Field dialog box, choose the Project field you want to add, such as WBS (as shown in Figure 25-10), and then click OK.**

   The checkmark in the Sync column is turned on automatically. Project automatically copies the field's name to the SharePoint Column box. If you want the SharePoint column to use a different heading, then type the name in the box before you click OK.

4. **To change the SharePoint column's name, in the Map Fields dialog box, type the new name. Turn the checkmark in a Sync cell off if you no longer want to synchronize the field.**

5. **When you're done mapping fields, click OK again to close the Map Fields dialog box, and then click Save.**

   You have to click Save to send the info from the new fields to SharePoint.

6. **Back in the SharePoint Tasks List, click the ellipsis to the left of the "Find an item" search box, and then choose "Modify this View."**

   The Settings→Edit View page appears.

7. **To display a field in the view, turn on the field's checkbox. Then click OK.**

   To reorder the columns in a view, in the "Position from Left" column, fill in the column number to specify the field's position in the table.

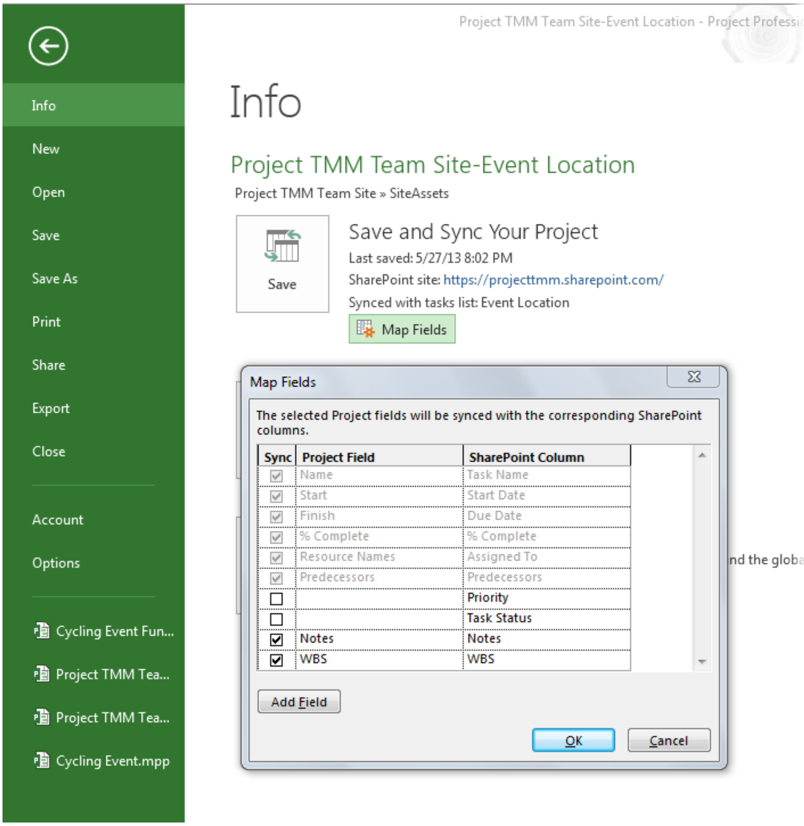

FIGURE 25-10

To map additional Project fields to a SharePoint Tasks List, click the Map Fields button below the "Save and Sync Your Project" info. The Map Fields dialog box lists the fields that appear in the Project view and in the SharePoint Tasks List. If you want to add other Projects fields, click Add Field. Then, you can choose the field you want to add and specify the name to use in the SharePoint column.

WORKAROUND WORKSHOP

Keeping Tasks in Order

The "Sync with Tasks List" feature has an annoying idiosyncrasy: Sometimes when you synchronize tasks, they come across in seemingly random order. Links to predecessors don't help. In Project, you can easily sort the list (page 355) by ID number, WBS code, or any other field to order it the way you want. Fortunately, you can sort tasks in SharePoint by adding the WBS field to a SharePoint Tasks List view. Then you can sort the Tasks List to match the order in your Project file. Here are the steps:

1. Add the WBS field to the SharePoint view, as described on page 25-20.
2. Synchronize your Tasks List to transfer the field values to SharePoint (page 25-16).
3. In the SharePoint Tasks List, click the ellipsis to the left of the "Find an item" box, and then choose "Modify this View."
4. Turn on the WBS field's checkbox and click OK.
5. On the Tasks List page, put your cursor over the WBS heading, and then click the down arrow that appears. In the drop-down list, choose "A on Top."

Updating Progress in a SharePoint Tasks List

You and your team members can view and edit values in SharePoint. But SharePoint doesn't offer the variety of progress update methods that Project does. For example, team members can change values in the % Complete field or change a finish date for a task. However, once you enter % Complete values or finish dates, you can synchronize the changes (in Project, choose File→Info→Save) to bring them back into Project. Here's how to update task status in SharePoint:

1. **On the left side of the site, click Site Contents, and then click the Tasks List you want to work on.**

   The Tasks List page opens.

2. **To see the tasks you're assigned to, click the ellipsis to the left of the "Find an item" box, and then choose My Tasks.**

   The Tasks List displays only the tasks to which you're assigned.

3. **Click the task to open it on its own page. Then, in the View tab's Manage section, click Edit Item.**

   The fields on the page become editable.

4. **In the % Complete box, type the percentage of the work that's complete, as shown in Figure 25-11.**

   If you want to update other values, such as Finish Date or Work, you can add those fields to SharePoint as described on page 25-20. Those fields then appear on the task's edit page. That way, you or your teammates can fill in the field values. When you sync the Tasks List and the Project file, those values propagate to your Project schedule.

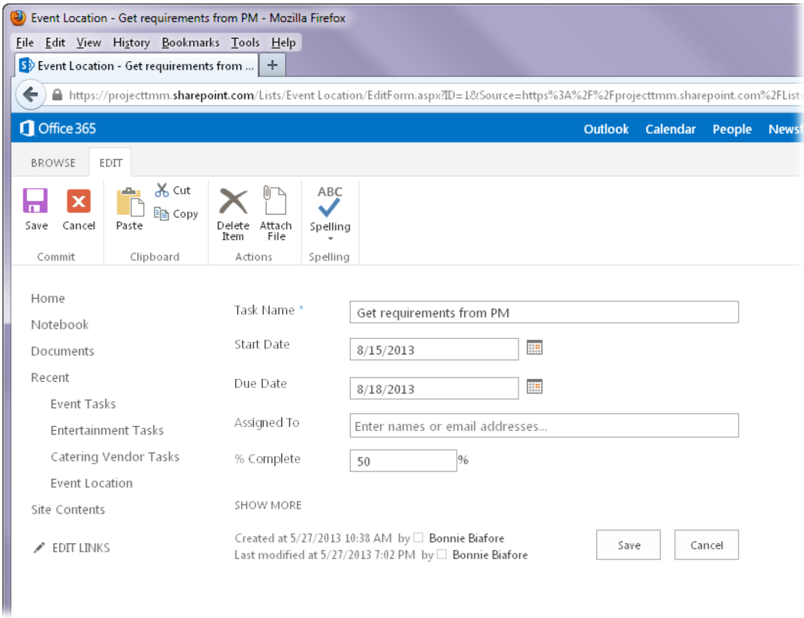

FIGURE 25-11

Fill in the % Complete field with the current percentage complete. If you map additional fields from Project into SharePoint, you can fill in other status values here, too.

5. **Click Save.**

   The updated values appear in the Tasks List. If you synchronize the tasks with Project, the updated values appear in your Project schedule.