
Hitchhiker's Guide to Demand Management

Project 2010 Case Study

Prepared for

Contoso

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1 INTRODUCTION

1.1 Purpose

This document should contain all the required information to get started on implementing a full Demand Management solution with Microsoft Project 2010.

It assumes that no previous configuration has been defined in a Project Web App instance.

1.2 Audience

The IT Pro

The Developer

The Project Management Office (PMO)

The Business Users

1.2.1 Reading Guide

Chapter	IT Pro	Developer	PMO	Business Users
Vision			X	X
Plan/Specify		X	X	X
Build/Create Configuration		X	X	
Build/Create Orchestration		X		
Deploy	X	X	X	X
Debug/Monitor	X			
Use				X

1.3 General steps

There are four general steps to perform to create your workflow in Microsoft Project Server 2010 that are detailed in this document:

1. Plan/Vision

-
2. Workflow Configuration: Create objects in Project Server
 3. Workflow Orchestration: Create workflow in Visual Studio 2010
 4. Deploy

The source code for this sample is available on MSDN Code Gallery at this URL:

<http://code.msdn.microsoft.com/PS2010DMSample>

2 VISION: CASE STUDY FOR CONTOSO

2.1 Introduction

In this chapter we define the demand management process to be used by Contoso.

It is not the goal of this document to describe how to define the demand management process; this subject is covered by the document [Demand Management in Project Server 2010](http://go.microsoft.com/fwlink/?LinkId=191854) (<http://go.microsoft.com/fwlink/?LinkId=191854>).

We use this simple example to model the project process from the Idea collection to its Execution and a Post Mortem:

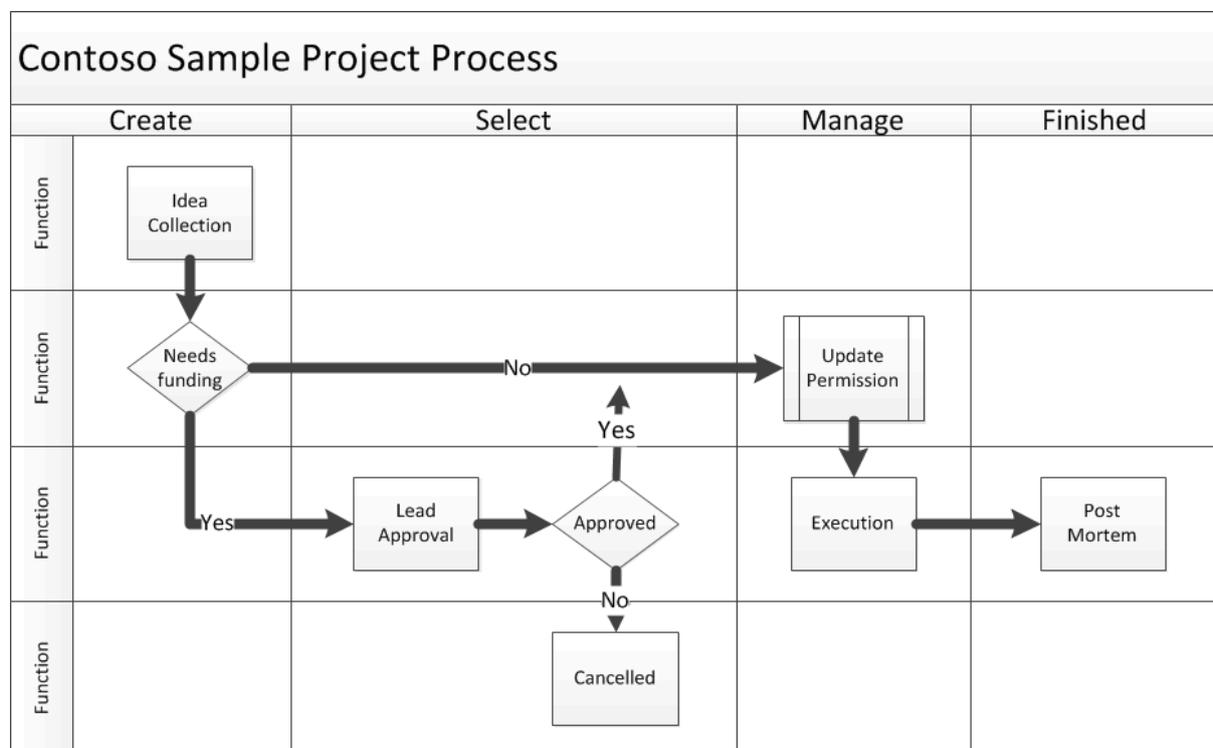


Figure 1: Contoso Sample Project Process

The Demand management process used by Contoso starts in the Create phase with collecting information about this new Idea: a name, a description, a choice to specify if some funding is required, and a proposed project manager.

If the project requires funding, we enter the Select phase where it will need to be approved by a Team Lead.

Once it is approved, or if no funding is required, we enter the Manage phase.

The project permissions will be updated to grant the Project manager rights to the specified proposed project manager. Then the project is executed and the scheduling is done by the project manager until the project is completed.

Once the project is completed, we enter the Finish phase, where information is captured about the project execution in a post-mortem stage.

This specification can be done using Microsoft Visio and the Cross-Functional Flowchart Template.

3 PLAN/SPECIFY: THE DEMAND MANAGEMENT PROCESS LIFECYCLE

3.1 Introduction

The demand management process captures all work proposals in one place, guides the proposals through a multistage governance process, helps users make decisions about which proposals to approve, and tracks progress on project execution until the work is completed. A key component within demand management is the workflow governance model implemented in Project Server.

A governance workflow includes definitions of the life cycle stages through which the project progresses, such as proposal creation and initial approval. The workflow defines what information is required or locked in each stage. For example, a workflow can lock budget cost after the project is approved. A workflow can include necessary manual approval or notification steps and add business logic to update other LOB systems. For example, a workflow can update an enterprise resource planning (ERP) system when the proposal budget is approved.

3.2 Overview

In project portfolio management, a project life cycle is a long-running process that spans governance phases. Typical demand management phases are: create, select, plan, and manage. The planning and management phases are accomplished by the more familiar project management processes by using Project Professional and Project Web App. Workflows model the governance processes and provide a structured way for projects to proceed through the phases. Workflows, along with other proposal data in project detail pages (PDPs), are captured and integrated within the demand management feature set, providing a rich and dynamic platform on which customers and partners can build custom solutions.

Figure 2 shows the four standard phases of demand management and how they fit together. Within each phase are stages such as Propose idea and Initial review. Each stage can have one or more associated PDPs in Project Web App. The entire collection of stages represents a single workflow that can be linked to an enterprise project template (EPT).

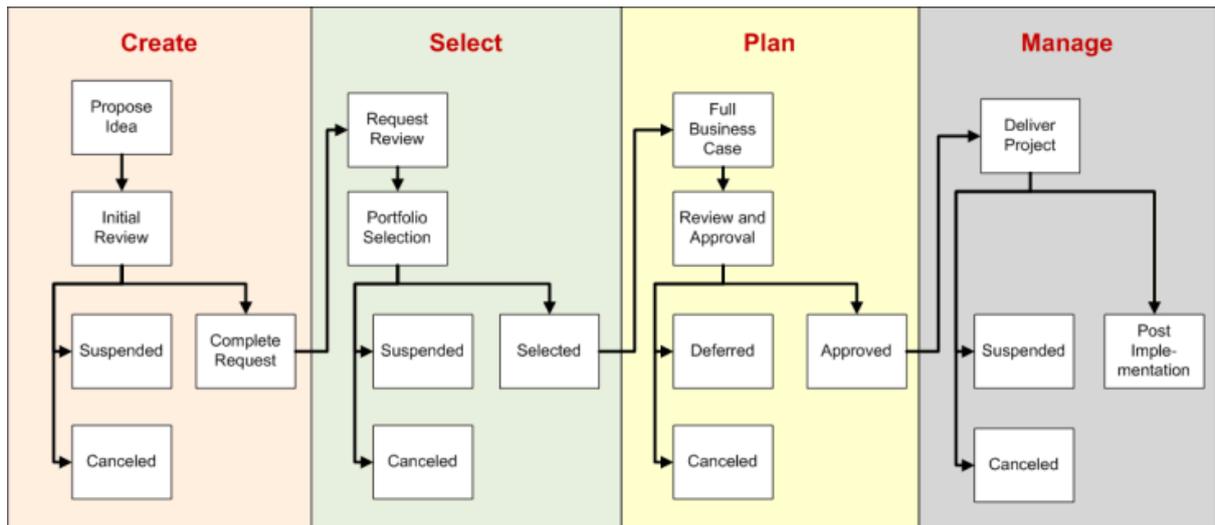


Figure 2: Demand management phases and stages

3.3 Define the process

We first define the process to be used in terms of Phases/Stages/Activities.

Our recommendation is to use a business modeling tool like Microsoft Visio to first outline the project processes.

In the Vision chapter, we have defined the Process for our simple project.

We will now refine this vision.

3.3.1 Phases

In our example we have identified the following phases:

Phase name	Phase Prefix
Create	C
Select	S
Manage	M
Finished	F

Figure 3: List of phases

We use a simple prefix, of one or 2 letters for each phase, that will allow us to use it when referring to the phase from another context.

3.3.2 Stages

For each stage, we define what are the inputs from the stage and the outputs resulting from this stage.

This will define the list of fields that are to be displayed in the Project Detail Page (PDP). At the same time (if necessary) we can list the resulting outputs from this stage (like computed fields).

- Define the Input and output of each stage
- Define the required information to capture (fields) in forms
- Define the state of the fields in each stage (Required, R/W, Read only)

A stage controls the behavior of:

- Visible PDPs
- Read-Only/Required Custom Fields
- Associated Phase

In our example we have defined the following stages:

Stage name	Stage Prefix	Inputs	Outputs
Idea Collection	IC	Name, Business Reason, Needs Funding, Project Manager	
Lead Approval	LA	Decision, Justification	
Cancelled	C	N/A	
Execution	E	Planning/Progress	
Post Mortem	PM	Lessons Learned, On Budget, Reasons	

Figure 4: List of stages

For each stage in our example, we detail the different fields.

Idea Collection Input	Required	State	Output	Format
Name	Yes	R/W		String 255 characters
Description	Yes	R/W		String Multiple lines
Needs Funding	Yes	R/W		Radio button
Project Manager	Yes	R/W		String 255 characters

Figure 5: List of fields for Idea Collection

Lead Approval Input	Required	State	Output	Format
Name	N/A	R		String 255 characters
Description	N/A	R		String Multiple lines
Project Manager	N/A	R		String 255 characters
Decision	Yes	R/W		Choice button
Justification	Yes	R/W		String Multiple lines

Figure 6: List of fields for Lead Approval

Cancelled Input	Required	State	Output	Format
				N/A

Figure 7: List of fields for Cancelled

Execution Input	Required	State	Output	Format
------------------------	-----------------	--------------	---------------	---------------

N/A

Figure 8: List of fields for Execution

Post Mortem Input	Required	State	Output	Format
Lessons Learned	Yes	R/W		String Multiple line
On Budget	Yes	R/W	Yes/No	Radio Button
Reasons		R/W		String Multiple line

Figure 9: List of fields for Post Mortem

3.3.3 Activities

For each stage we define if specific activities are needed.

Some examples of possible activities are:

- Define if an approval is needed
- Define if e-mail messages are sent
- Define which information on the progress of the workflow is to be communicated to the users

In our example here are the lists of activities we have identified:

Stage name	Activities List	Progress information
Idea Collection	Needs funding Approval	
Lead Approval	Approval	
Cancelled	Cancelled	
Execution	E-mail to inform Project Manager Update Project Permission	
Post Mortem		

Figure 10: List of activities

3.4 The Contoso Sample Project

Here is the Visio diagram of the Contoso Sample project Workflow.

This diagram captures the different objects that are present in our workflow solution:

- the phases
- the stages
- the activities
- the PDPs visible for each activity and the state: Read-only or R/W.

Contoso Sample Project

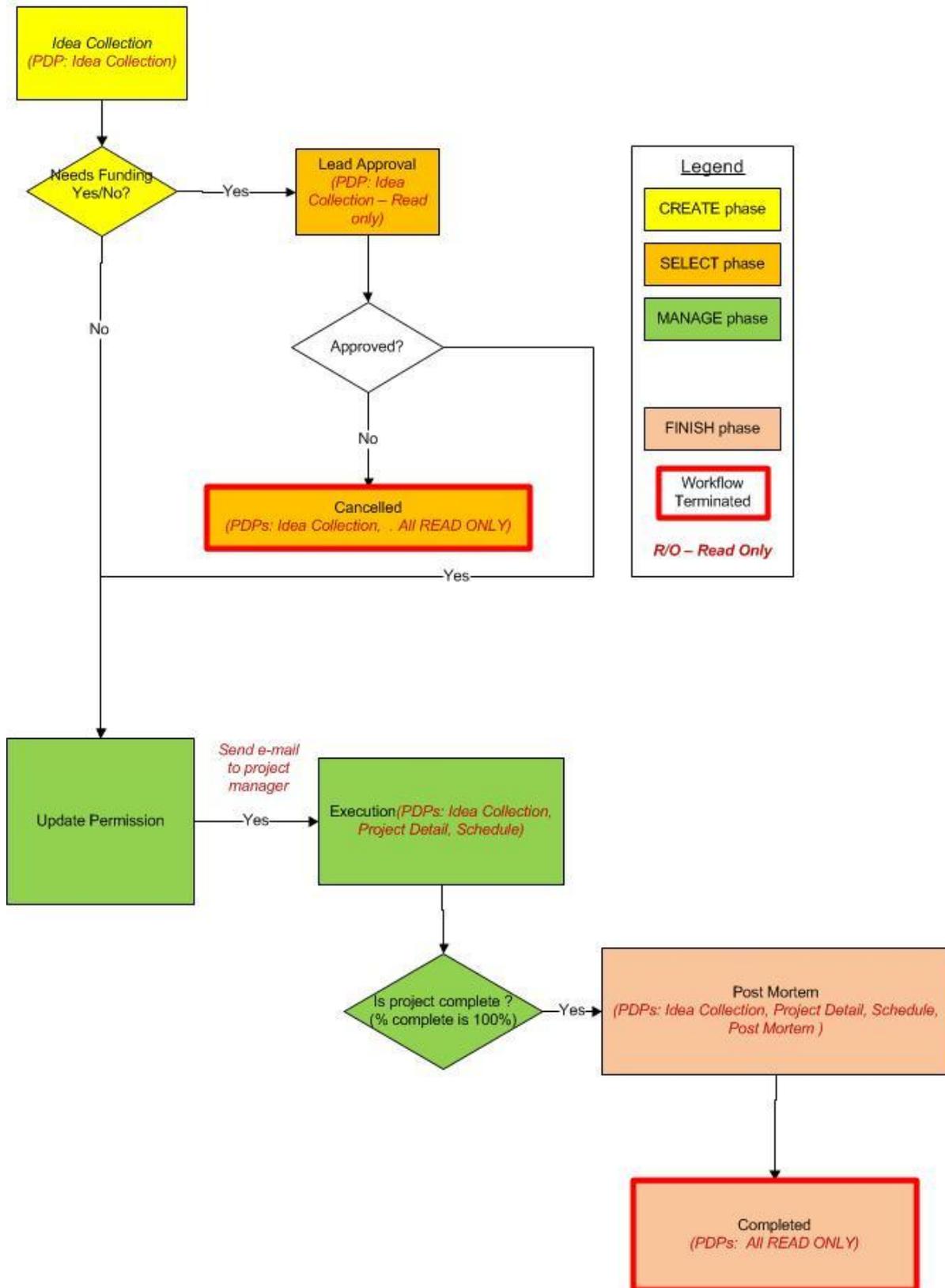


Figure 11: Contoso Sample Project Process (detailed)

3.5 List of the objects to configure/use in Project 2010

The following objects are configured and used in Project 2010 for our example:

Objects	List
<ul style="list-style-type: none"> ■ Phases 	Create Select Manage Finished
<ul style="list-style-type: none"> ■ Stages (Linked to the Visual Studio Workflow) 	Idea Collection Lead Approval Cancelled Execution Post Mortem
<ul style="list-style-type: none"> ■ Custom Fields and Lookup Tables (Linked to the Visual Studio Workflow) 	Proposed Project Manager (a Project resource) Funding Required On Budget Reasons Lessons Learned
<ul style="list-style-type: none"> ■ Project Detail Pages 	Idea Collection (Initial Project Page) Post Mortem
<ul style="list-style-type: none"> ■ Default Web Part and Custom Web Parts 	Project Fields
<ul style="list-style-type: none"> ■ Enterprise Project Type 	Contoso Sample Project
<ul style="list-style-type: none"> ■ Workflow Approval page 	Default Project Server Approval

Figure 12: List of objects to configure/use in Project Server 2010

Apart from these workflow-related objects, we need to define some users in the PWA instance.

The workflow uses the members of the Team Lead default Security Group to get the approval on the project when funding is required. At least one user must be a member of this default security group.

4 BUILD/CREATE: WORKFLOW CONFIGURATION

4.1 Enterprise Project Templates

An enterprise project type represents a wrapper that encapsulates phases, stages, a single workflow, and PDPs. Each EPT represents a single project type. Normally, project types are aligned with individual departments, for example, marketing projects, IT projects, or HR projects. Using project types helps to categorize projects within the same organization that have a similar project life cycle. For a user, the EPTs appear in a drop-down list of project types when the user clicks New Project on the Ribbon in Project Web App.

4.2 Phase: A Collection of Steps in a Project Life Cycle

A phase represents a collection of stages grouped to identify a common set of activities in the project life cycle. Examples of phases are project creation, project selection, and project management (shown as Create, Select, and Manage Phases. Phases do not have any direct technical effect on the behavior of an EPT. That is, changing the order of phases does not affect how the system reacts. The primary purpose of demand management phases is to provide a smoother user experience where users have the option of organizing stages into logical groups.

4.3 Stage: A Step in a Project Life Cycle

A stage represents one step within a project life cycle. A stage is composed of one or more PDPs linked by common logic or theme. Stages at a user level appear as steps within a project. At each step, data must be entered, modified, reviewed, or processed.

4.4 Project Detail Pages (PDP) in Stages

A PDP represents a single Web Part Page in Project Web App. PDPs can be used to display or collect information from the user. You can create PDPs in much the same way you create any Web Part Page in a SharePoint site, where you can add Web Parts that provide the experience you want. You can add individual Web Parts from the standard Web Part galleries or create custom Web Parts.

Project Server Web Parts and custom Web Parts used in demand management all contain custom fields. Web Parts can make calls to the Project Server Interface (PSI), query the Reporting database, or integrate with external systems. Figure 13 shows the general hierarchy of the parts of demand management in Project Server 2010.



Figure 13: Hierarchy of Project Server objects

4.5 Configuration tasks on Project Server 2010

4.5.1 Initial Setup

After the initial configuration of Project Server 2010, the following step needs to be checked:

- To define the Workflow Proxy Setting account.

The Project Server Workflows need to run under the context of a Windows user. However, they do not run under the context of the user that started the project. Instead, the workflows are run under the “Workflow Proxy Account”. This means that the user account that you specify as the workflow proxy account must have the proper rights to execute all of the commands that a Project Server workflow will need to do.

You can find information on how to set up the Workflow Proxy Account in this article:

<http://blogs.technet.com/projectadministration/archive/2009/12/21/how-to-setup-the-workflow-proxy-account.aspx>

4.5.2 Workflow configuration

The following configuration tasks will have to be done on Project Server 2010.

We recommend doing the tasks in this order.

1. Define the list of Lookup Table Values (LTV)
2. Define the list of Custom Fields (CF)
3. Define the list of Project Detail Pages (PDP)
4. Define the list of Workflow Stages
5. Define the list of Workflow Phases
6. Create the Enterprise Project Types (EPT) (without Workflow, if workflow not yet deployed)
7. Define the Permissions for users involved in Workflow.

4.6 Configuration Best practices

4.6.1 Naming conventions to use to distinguish specific workflow objects

For each kind of object to be defined in the Workflow configuration, we recommend to use some specific naming conventions. These conventions will ease the initial configuration of the workflow and its maintenance.

Workflow Phase: Prefix with a number to force the order in the display

Also, if a Phase is unique for a certain type of Workflow, add an acronym after the number that defines the uniqueness.

Maybe always use specific phases for each workflow, instead of sharing between several different workflows

For example, for an IT Workflow:

1-IT Demand Management	DM
2-IT Portfolio Selection	PS
3-IT Portfolio Planning	PP
4-IT Tracking and Remediation	TR

Figure 14: IT Workflow phases

Workflow Stages: Use a lowercase letter (s, for example) followed by a number, to force the order of display and to distinguish from phases. You can also use an acronym after the order letter to attach to a specific workflow.

s1- IT Idea Collection	
s2-IT Lead Approval	
s3-IT Idea Cancelled	
s4-IT Scheduled	
s5- IT Execute	
s6- IT Post Mortem	

Figure 15: IT Workflow stages

In our Simple Project example for the phases:

1-Create	CR
2-Select	SE
3-Manage	MA
4-Finished	FI

Figure 16: Contoso Sample Project example phases

In our Simple Project example for the stages:

s1-Idea Collection	ic
s2-Lead Approval	ap
s3-Cancelled	ca
s4-Execution	ex
s5-Post Mortem	pm

Figure 17: Contoso Sample Project example stages

4.6.2 List of custom fields used in our example

In our Simple Project example we use the following fields:

Project Name (default field)
Description (default field)
Funding Required
Proposed Project Manager
Lessons Learned
On Budget

Reasons

Figure 18: Contoso list of custom fields

4.7 How to (in Project 2010)

In this chapter we describe the precise steps involved to create the different objects of our example using the administrative pages of Project Web App.

1. Custom Field and Lookup table Guids
2. Web Part specific Creation
3. Project Detail Pages (PDP) Creation
4. Workflow Phases Creation
5. Workflow Stages Creation
6. Enterprise Project Type (EPT) Creation

We start from a basic Project Web App instance that is named:

<http://project.contoso.com/PWA1>

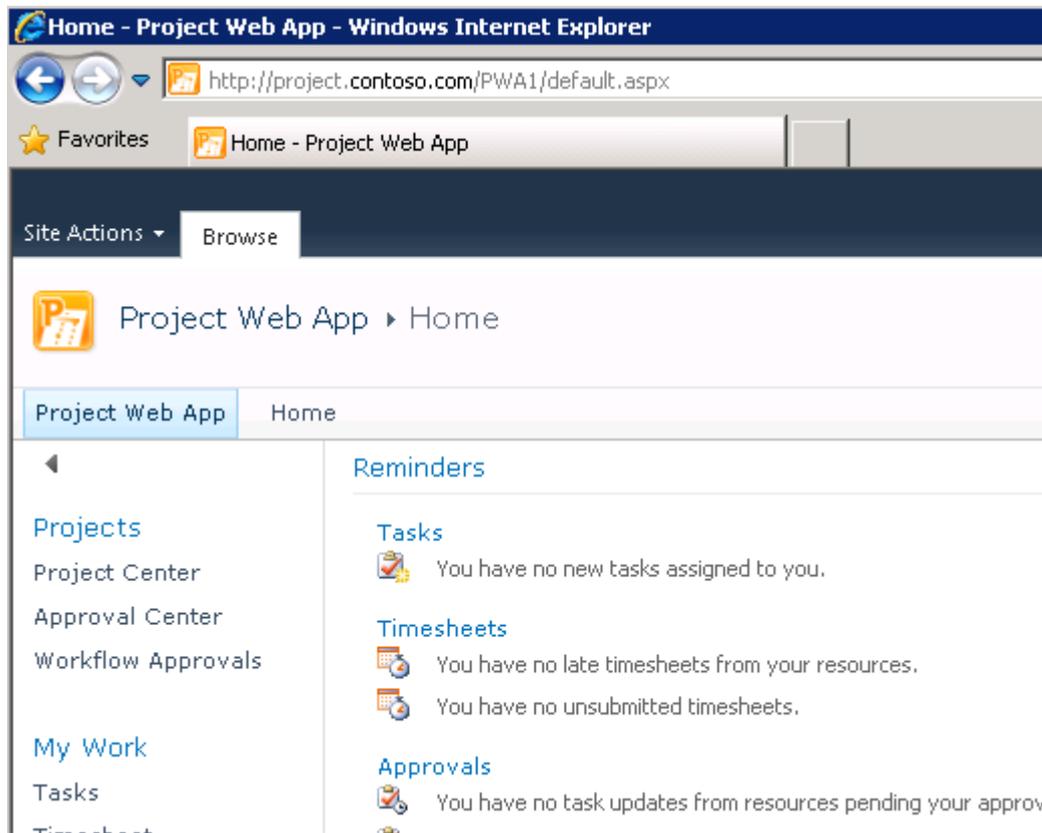


Figure 19: PWA1 Project Web App

This application has only the sample workflow installed, but we will not use any objects from this sample in our example, apart from the Project Approval form.

You must log on using the Functional Project administrator, to do the configuration.

We need to create the Project Server objects in a bottom up order, following the hierarchy presented in Figure 13.

4.7.1 Lookup tables and Custom Fields

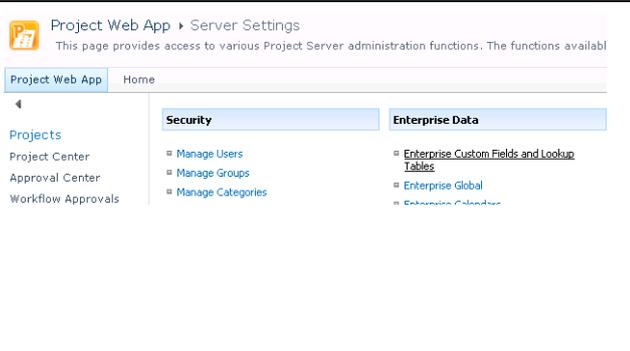
In this chapter we first create the Lookup tables (LT) and then the Custom Fields for our example.

Field name	Custom Field (CF) or Lookup Table (LT)	Type
Funding Required LT	LT	Text: Value Yes/No
Funding Required	CF	Project of Type Text Using a lookup table
Proposed Project Manager	CF	Project of Type Text
Lessons Learned	CF	Project of Type Text
On Budget LT	LT	Text: Value OK/Under/Exceeded
On Budget	CF	Project of Type Text Using a lookup table
Reasons	CF	Project of Type Text

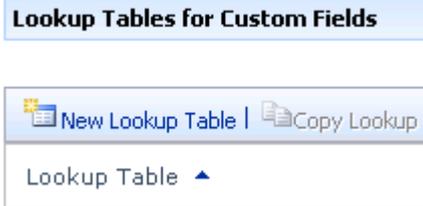
Figure 20: List of CF and LT for Contoso sample

Actions

Screen

<p>In Project Web App, after selecting Settings/Server Settings:</p> <p>Select</p> <p>Enterprise Custom Fields and Lookup Tables</p>	 <p>The screenshot shows the 'Project Web App' interface. The breadcrumb path is 'Project Web App > Server Settings'. Below the breadcrumb, there are two main sections: 'Security' and 'Enterprise Data'. Under 'Enterprise Data', the option 'Enterprise Custom Fields and Lookup Tables' is highlighted with a blue bar. Other options visible include 'Manage Users', 'Manage Groups', 'Manage Categories', 'Enterprise Global', and 'Extension Calendar'.</p>
--	---

Select the "New Lookup Tables" button



Name: Funding required

Type: Text

Code Mask: *

Lookup Table values:

Yes

No

Sequence	Length	Separ
Characters	Any	.

Level	Value	Descr
1	Yes	
1	No	

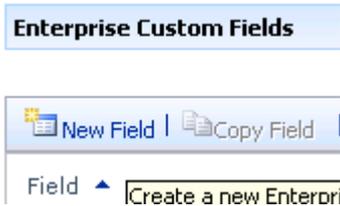
It is important to take a note of the GUID of the "Yes" value and the Lookup table itself. These values will be needed later. You must first Save the new Lookup table and reopen it.

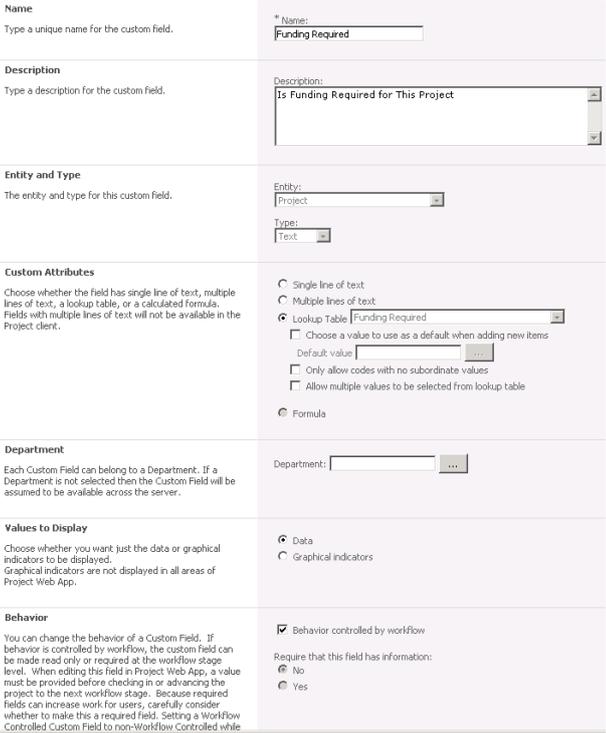
Select the value Yes in the Lookup table, and get the value just under the table.

Lookup Table Value GUID: 6e579ab-eea5-4650-94a2-61677db6096f
Display GUID for selected lookup table:
 By row number

To create the field "Funding Required", select the button "New Field" in the Enterprise Custom Fields section.

Select "Field" button



<p>Name: Funding required</p> <p>Entity and Type: Project</p> <p>Text</p> <p>Custom Attributes:</p> <p>Lookup Table: Funding Required</p> <p>Behavior: Select Behavior controlled by workflow</p>	
<p>It is important to take a note of the GUID of the Custom field.</p> <p>You must first Save the new Custom field and reopen it.</p> <p>For the Custom Field GUID, check the last field</p> <p>System Identification Data</p>	

Name: Proposed Project Manager
Entity and Type: Project Text
Custom Attributes: Single Line of Text
Behavior: Select Behavior controlled by workflow

* Name:

Description:

Entity:

Type:

Single line of text
 Multiple lines of text
 Lookup Table
 Formula

Department: ...

Data
 Graphical indicators

Behavior controlled by workflow

Name: Lessons Learned

Entity and Type: Project Text

Custom Attributes: Multiple Lines of Text

Behavior: Select Behavior controlled by workflow

* Name:

Description:

Entity:

Type:

Single line of text
 Multiple lines of text
 Lookup Table
 Formula

Department: ...

Data
 Graphical indicators

Behavior controlled by workflow

Lookup table

Name: On Budget

Type: Text

Code Mask: *

Lookup Table values:

OK

Under

Exceeded

* Name:

Type:

Code preview:

Code mask:

Sequence	Length	Separator
Characters	Any	.

Level	Value	Description
1	OK	
1	Under	
1	Exceeded	

<p>Name: On Budget</p> <p>Entity and Type:</p> <p>Project</p> <p>Text</p> <p>Custom Attributes: Single Line of Text</p> <p>Behavior: Select Behavior controlled by workflow</p>	<p>* Name: <input type="text" value="On Budget"/></p> <hr/> <p>Description: <input type="text" value="Was the project executed on the forecasted budget"/></p> <hr/> <p>Entity: <input type="text" value="Project"/></p> <p>Type: <input type="text" value="Text"/></p> <hr/> <p> <input type="radio"/> Single line of text <input type="radio"/> Multiple lines of text <input checked="" type="radio"/> Lookup Table <input type="text" value="On Budget"/> </p> <p> <input type="checkbox"/> Choose a value to use as a default when adding new items Default value <input type="text"/> ... </p> <p> <input type="checkbox"/> Only allow codes with no subordinate values <input type="checkbox"/> Allow multiple values to be selected from lookup table </p> <p> <input type="radio"/> Formula </p> <hr/> <p>Department: <input type="text"/> ...</p> <hr/> <p> <input checked="" type="radio"/> Data <input type="radio"/> Graphical indicators </p> <hr/> <p> <input checked="" type="checkbox"/> Behavior controlled by workflow </p>
---	---

Figure 21: Steps to create CF and LT

4.7.2 Project Detail Pages Creation

There are three types of Project Detail Pages that can be created:

- **New Project:** Used for creating a project. This type of PDP is required with an enterprise project template that has a workflow for portfolio analysis.
- **Workflow Status:** Shows the current stage and status for a project proposal.
- **Project:** Used for editing project details in a non-workflow enterprise project template, or in other applications.

It is a good practice to create your own New Project page, so that you can start to enter directly required information for creating your project.

In our example we are creating the following PDPs:

- IdeaCollection
- PostMortem

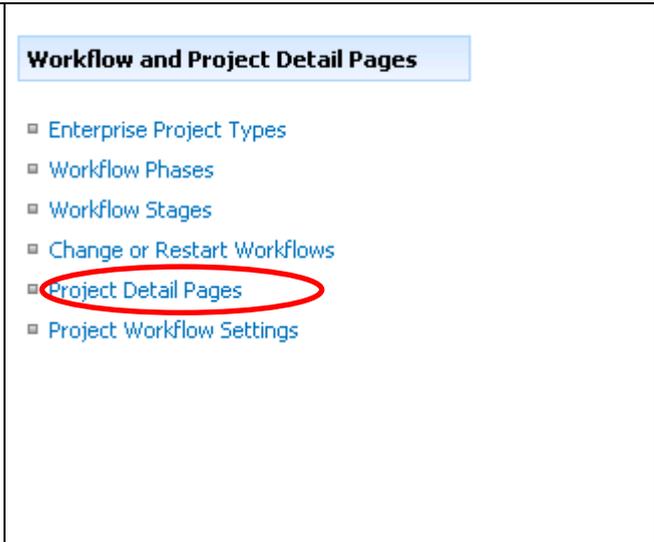
Actions

Screen

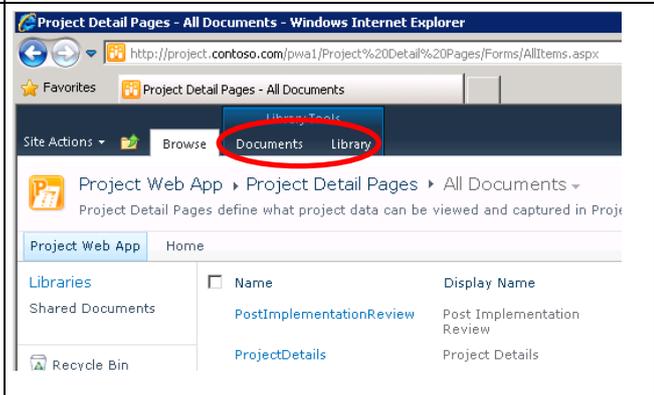
In Project Web App, after selecting Settings/Server Settings:

Select

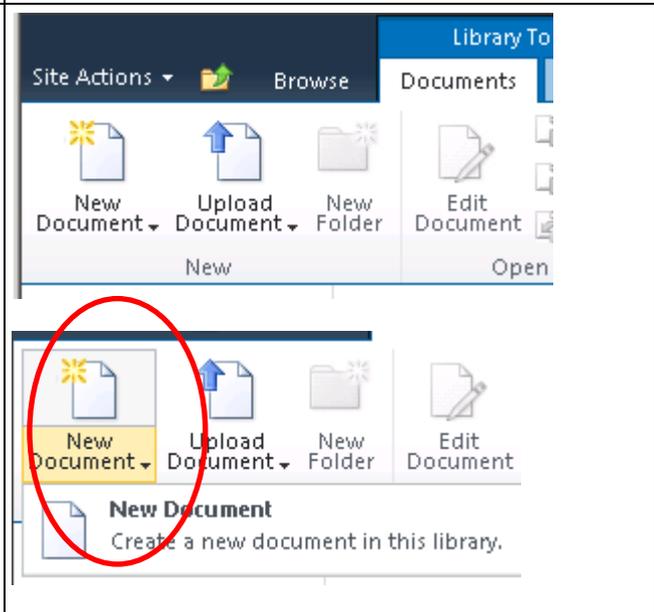
Project detail Pages in the last section



Select the Documents tab

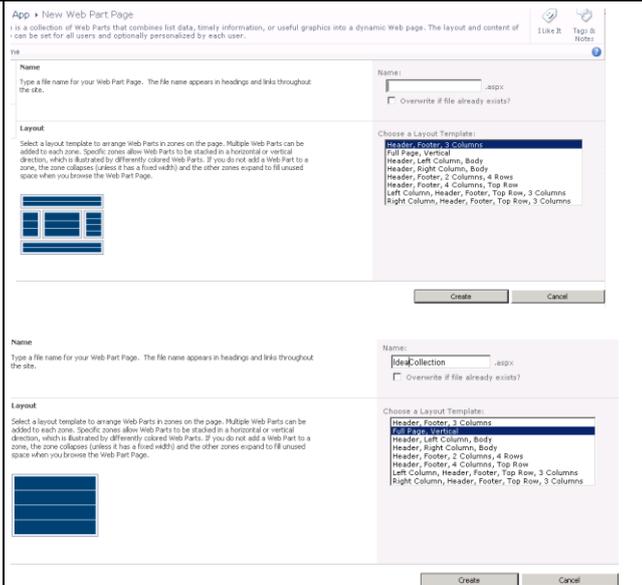


Select New Document in the ribbon



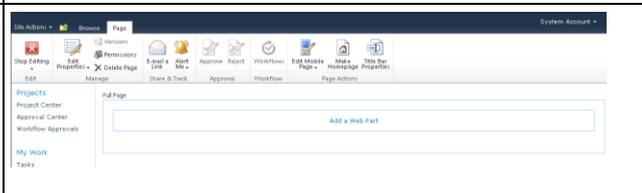
Select a Full Page vertical Page and name it:

IdeaCollection



We can now add some Web Parts to this blank page.

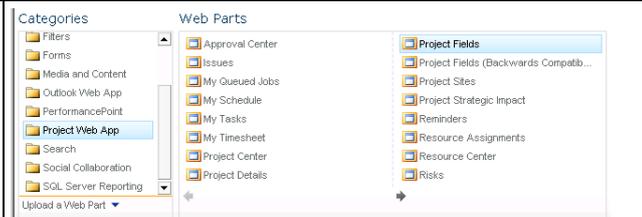
Select Add a Web Part



Select Categories: Project Web App

Web Parts: Project Fields

And the button Add



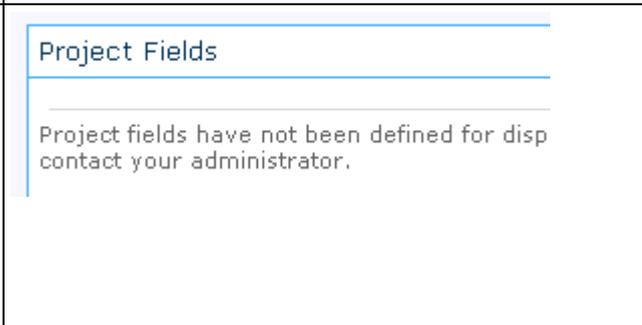
Project Fields

Displays list that may consist of project custom fields, project summary fields, and project inherent fields such as project name, description, or owner. The list is editable when used within the Project Detail Pages infrastructure.

The Project Fields Web Part is displayed.

You have to select some project fields now to populate the Web Part.

Select from the right top menu: Edit Web Part



<p>Select the Modify button</p>	
<p>Select the fields:</p> <ul style="list-style-type: none"> Project Name Description Funding Required Proposed Project Manager 	

Update the Title of the page to:

Idea Collection

Select OK to close the update of the Web Part.

Project Fields

Displayed Project Fields

- Project Name
- Description
- Funding Required
- Proposed Project Manager

Modify

Appearance

Title

Idea Collection

Height

Should the Web Part have a fixed height?

Yes Pixels

No. Adjust height to fit zone.

Width

Should the Web Part have a fixed width?

Yes Pixels

No. Adjust width to fit zone.

Chrome State

Minimized

Normal

Chrome Type

Title Only

Layout

Advanced

Project Web App

OK Cancel Apply

The PDP is now ready

Idea Collection

Name

Description

Funding Required

Proposed Project Manager

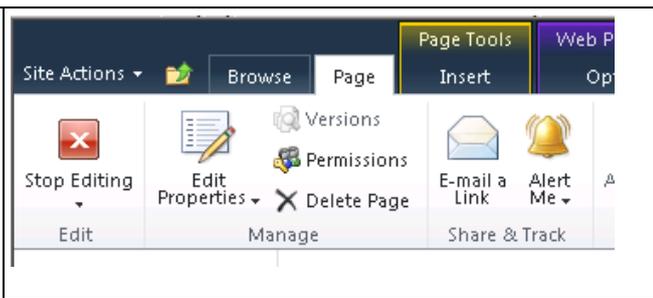
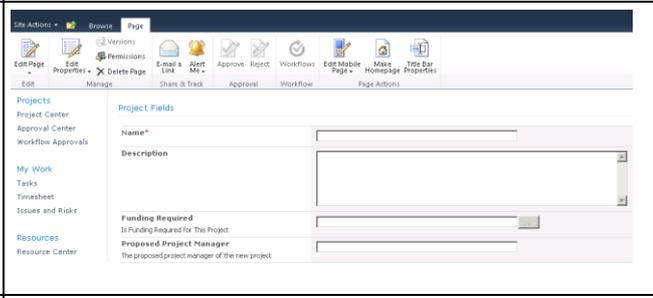
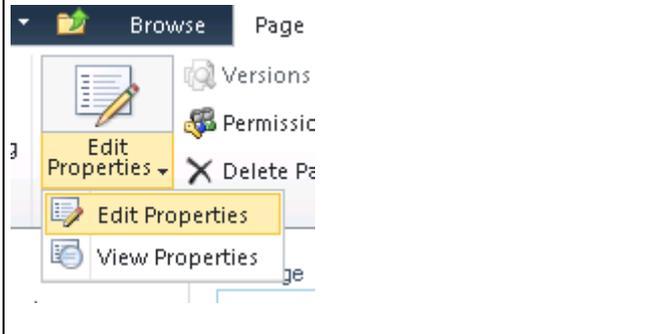
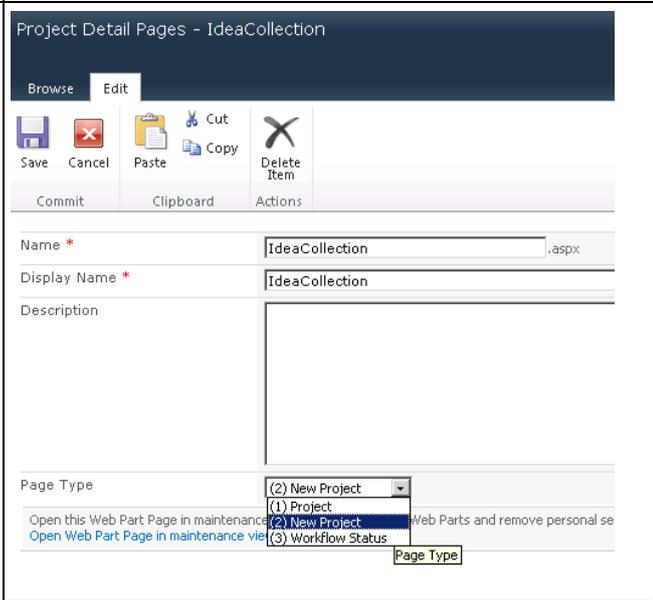
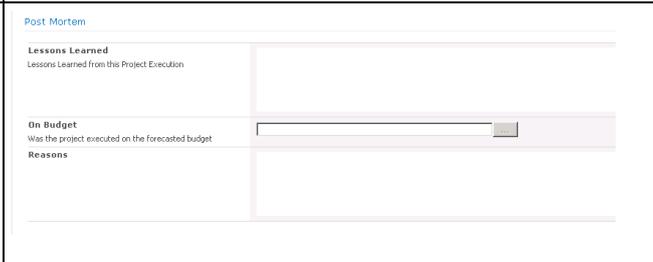
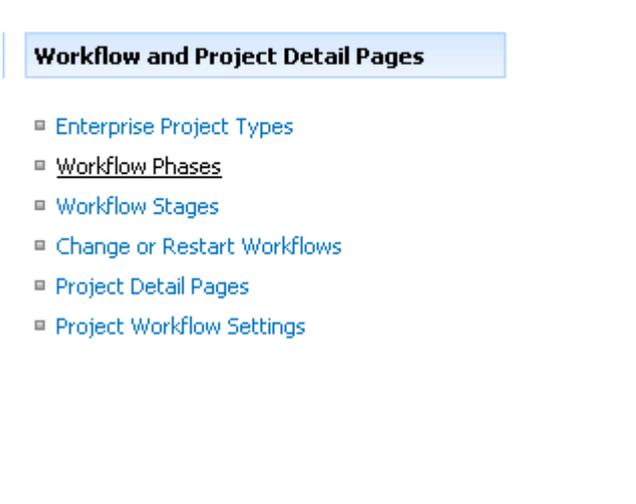
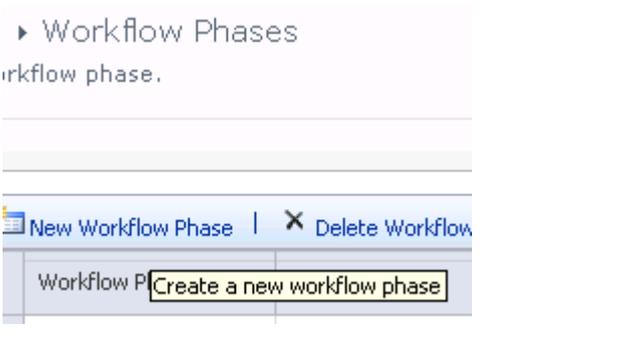
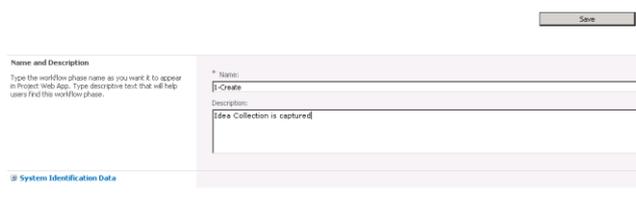
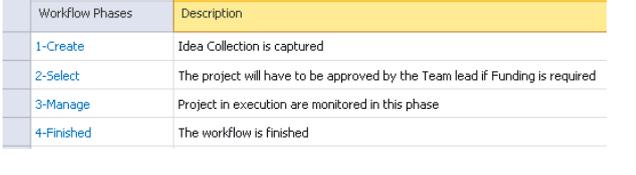
<p>Select the Page Tools tab in the ribbon</p> <p>And the Stop Editing command</p>	
<p>PDP page is now finished</p>	
<p>We have to edit the properties of the page.</p>	
<p>Update the Display Name to:</p> <p>Idea Collection</p> <p>Select "New Project" for the Page Type.</p>	
<p>Do the same for the Post Mortem page</p> <p>Add these fields:</p> <ul style="list-style-type: none"> • Lessons Learned • On Budget • Reasons 	

Figure 22: Steps to create PDPs

4.7.3 Workflow Phases Creation

The following phases will be created:

- 1-Create
- 2-Select
- 3-Manage
- 4-Finished

Actions	Screen										
<p>In Project Web App, after selecting Settings/Server Settings:</p> <p>Select:</p> <p>Workflow Phases</p>	 <p>The screenshot shows a navigation menu titled "Workflow and Project Detail Pages" with the following items: Enterprise Project Types, Workflow Phases, Workflow Stages, Change or Restart Workflows, Project Detail Pages, and Project Workflow Settings.</p>										
<p>Select New Workflow Phase</p>	 <p>The screenshot shows a dialog box titled "New Workflow Phase" with a "Delete Workflow" button. The main content area contains the text "Workflow Phases" and "Workflow phase." Below this is a form with a "Create a new workflow phase" button.</p>										
<p>Name : 1-Create and add a description</p>	 <p>The screenshot shows a form titled "Name and Description" with a "Save" button. The form has two sections: "Name" with a text input field containing "1-Create" and "Description" with a text area containing "Idea Collection is captured".</p>										
<p>Create the following phases:</p> <p>2-Select</p> <p>3-Manage</p>	 <p>The screenshot shows a table with two columns: "Workflow Phases" and "Description".</p> <table border="1"> <thead> <tr> <th>Workflow Phases</th> <th>Description</th> </tr> </thead> <tbody> <tr> <td>1-Create</td> <td>Idea Collection is captured</td> </tr> <tr> <td>2-Select</td> <td>The project will have to be approved by the Team lead if Funding is required</td> </tr> <tr> <td>3-Manage</td> <td>Project in execution are monitored in this phase</td> </tr> <tr> <td>4-Finished</td> <td>The workflow is finished</td> </tr> </tbody> </table>	Workflow Phases	Description	1-Create	Idea Collection is captured	2-Select	The project will have to be approved by the Team lead if Funding is required	3-Manage	Project in execution are monitored in this phase	4-Finished	The workflow is finished
Workflow Phases	Description										
1-Create	Idea Collection is captured										
2-Select	The project will have to be approved by the Team lead if Funding is required										
3-Manage	Project in execution are monitored in this phase										
4-Finished	The workflow is finished										

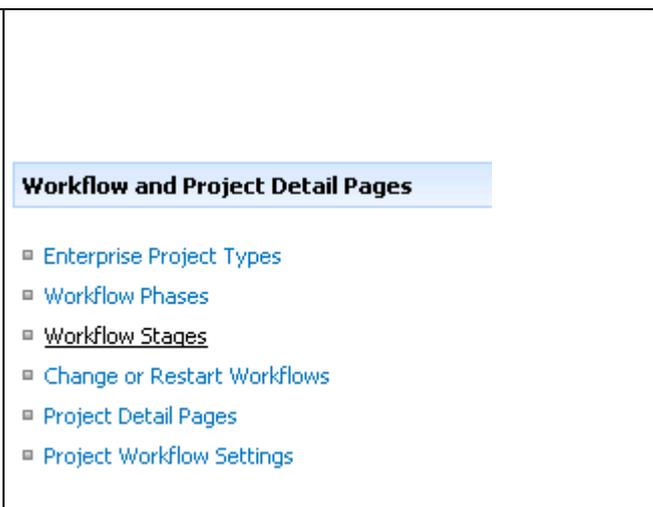
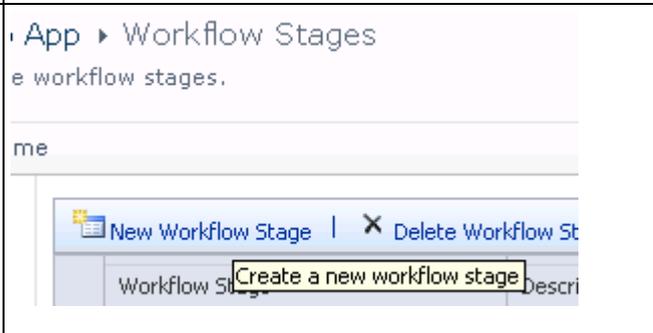
4-Finished	
------------	--

Figure 23: Steps to create phases

4.7.4 Workflow Stages Creation

The following five stages are created:

- s1-Idea Collection
- s2-Lead Approval
- s3-Cancelled
- s4-Execution
- s5-Post Mortem

Actions	Screen
<p>In Project Web App, after selecting Settings/Server Settings:</p> <p>Select</p> <p>Workflow Phases</p>	
<p>Select New Workflow Stage</p>	

<p>Enter the following</p> <p>Name: s1- Idea Collection</p> <p>Description</p> <p>Workflow phase: 1-Create</p> <p>Visible Project Detail Pages:</p> <ul style="list-style-type: none"> Idea Collection Project Details <p>The two required fields:</p> <ul style="list-style-type: none"> Funding required Proposed Project Manager 	<p>Workflow Phase: 1-Create</p> <p>Choose Workflow Stage Status Project Detail Page: Proposal Stage Status</p> <p>Available Project Detail Pages:</p> <table border="1"> <tr><td>Post Implementation Review</td><td>Add ></td></tr> <tr><td>PostMortem</td><td>Add All >></td></tr> <tr><td>Project Information</td><td><< Remove All</td></tr> <tr><td>Proposal Details</td><td>< Remove</td></tr> <tr><td>Proposal Start and End Date:</td><td></td></tr> <tr><td>Proposal Summary</td><td></td></tr> <tr><td>Schedule</td><td></td></tr> </table> <p>* Selected Project Detail Pages:</p> <table border="1"> <tr><td>Idea Collection</td></tr> <tr><td>Project Details</td></tr> </table> <p>Choose Custom Fields:</p> <table border="1"> <tr><td>Lessons Learned</td><td>Add ></td></tr> <tr><td>On Budget</td><td>Add All >></td></tr> <tr><td>Reasons</td><td><< Remove All</td></tr> <tr><td>Sample Approved Finish Date</td><td>< Remove</td></tr> <tr><td>Sample Approved Start Date</td><td></td></tr> <tr><td>Sample Areas Impacted</td><td></td></tr> <tr><td>Sample Assumptions</td><td></td></tr> </table> <p>Funding Required Proposed Project Manager</p>	Post Implementation Review	Add >	PostMortem	Add All >>	Project Information	<< Remove All	Proposal Details	< Remove	Proposal Start and End Date:		Proposal Summary		Schedule		Idea Collection	Project Details	Lessons Learned	Add >	On Budget	Add All >>	Reasons	<< Remove All	Sample Approved Finish Date	< Remove	Sample Approved Start Date		Sample Areas Impacted		Sample Assumptions											
Post Implementation Review	Add >																																								
PostMortem	Add All >>																																								
Project Information	<< Remove All																																								
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Proposal Start and End Date:																																									
Proposal Summary																																									
Schedule																																									
Idea Collection																																									
Project Details																																									
Lessons Learned	Add >																																								
On Budget	Add All >>																																								
Reasons	<< Remove All																																								
Sample Approved Finish Date	< Remove																																								
Sample Approved Start Date																																									
Sample Areas Impacted																																									
Sample Assumptions																																									
<p>Name: s2- Lead Approval</p> <p>Description</p> <p>Workflow phase: 2-Select</p> <p>Visible Project Detail Pages:</p> <ul style="list-style-type: none"> Idea Collection Project Details <p>The required field:</p> <ul style="list-style-type: none"> Proposed Project Manager <p>The read-only field:</p> <ul style="list-style-type: none"> Funding required 	<p>Workflow Phase: 2-Select</p> <p>Choose Workflow Stage Status Project Detail Page: Proposal Stage Status</p> <p>Available Project Detail Pages:</p> <table border="1"> <tr><td>Post Implementation Review</td><td>Add ></td></tr> <tr><td>PostMortem</td><td>Add All >></td></tr> <tr><td>Project Information</td><td><< Remove All</td></tr> <tr><td>Proposal Details</td><td></td></tr> <tr><td>Proposal Start and End Date:</td><td></td></tr> </table> <p>* Selected Project Detail Pages:</p> <table border="1"> <tr><td>Idea Collection</td></tr> <tr><td>Project Details</td></tr> </table> <p>Up Down</p> <p>Choose Custom Fields:</p> <table border="1"> <tr><td>Funding Required</td><td>Add ></td></tr> <tr><td>Lessons Learned</td><td>Add All >></td></tr> <tr><td>On Budget</td><td><< Remove All</td></tr> <tr><td>Reasons</td><td>< Remove</td></tr> <tr><td>Sample Approved Finish Date</td><td></td></tr> <tr><td>Sample Approved Start Date</td><td></td></tr> <tr><td>Sample Areas Impacted</td><td></td></tr> </table> <p>Proposed Project Manager</p> <p>Choose Custom Fields:</p> <table border="1"> <tr><td>Lessons Learned</td><td>Add ></td></tr> <tr><td>On Budget</td><td>Add All >></td></tr> <tr><td>Proposed Project Manager</td><td><< Remove All</td></tr> <tr><td>Reasons</td><td>< Remove</td></tr> <tr><td>Sample Approved Finish Date</td><td></td></tr> <tr><td>Sample Approved Start Date</td><td></td></tr> <tr><td>Sample Areas Impacted</td><td></td></tr> </table> <p>Funding Required</p>	Post Implementation Review	Add >	PostMortem	Add All >>	Project Information	<< Remove All	Proposal Details		Proposal Start and End Date:		Idea Collection	Project Details	Funding Required	Add >	Lessons Learned	Add All >>	On Budget	<< Remove All	Reasons	< Remove	Sample Approved Finish Date		Sample Approved Start Date		Sample Areas Impacted		Lessons Learned	Add >	On Budget	Add All >>	Proposed Project Manager	<< Remove All	Reasons	< Remove	Sample Approved Finish Date		Sample Approved Start Date		Sample Areas Impacted	
Post Implementation Review	Add >																																								
PostMortem	Add All >>																																								
Project Information	<< Remove All																																								
Proposal Details																																									
Proposal Start and End Date:																																									
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Reasons	< Remove																																								
Sample Approved Finish Date																																									
Sample Approved Start Date																																									
Sample Areas Impacted																																									

<p>Name:s3- Cancelled</p> <p>Description</p> <p>Workflow phase: 2-Select</p> <p>Visible Project Detail Pages:</p> <ul style="list-style-type: none"> Idea Collection Project Details <p>The required field:</p> <ul style="list-style-type: none"> None <p>The read-only fields:</p> <ul style="list-style-type: none"> Proposed Project Manager Funding required 	<p>Workflow Phase: 2-Select</p> <p>Choose Workflow Stage Status Project Detail Page: Proposal Stage Status</p> <p>Available Project Detail Pages:</p> <ul style="list-style-type: none"> Post Implementation Review PostMortem Project Information Project Details Proposal Start and End Dates Proposal Summary Schedule <p>* Selected Project Detail Pages:</p> <ul style="list-style-type: none"> Idea Collection Project Details <p>Current Item: Idea Collection</p> <p>Choose Custom Fields:</p> <ul style="list-style-type: none"> Funding Required Lessons Learned On Budget Proposed Project Manager Reasons Sample Approved Finish Date Sample Approved Start Date <p>Choose Custom Fields:</p> <ul style="list-style-type: none"> Lessons Learned On Budget Reasons Sample Approved Finish Date Sample Approved Start Date Sample Areas Impacted Sample Assumptions <p>Funding Required Proposed Project Manager</p>
<p>Name: s4- Execution</p> <p>Description</p> <p>Workflow phase: 3-Manage</p> <p>Visible Project Detail Pages:</p> <ul style="list-style-type: none"> Idea Collection Project Details Schedule Schedule <p>The required field:</p> <ul style="list-style-type: none"> None <p>The read-only fields:</p> <ul style="list-style-type: none"> Proposed Project Manager Funding required 	<p>Workflow Phase: 3-Manage</p> <p>Choose Workflow Stage Status Project Detail Page: Proposal Stage Status</p> <p>Available Project Detail Pages:</p> <ul style="list-style-type: none"> Post Implementation Review PostMortem Project Information Project Details Proposal Start and End Dates Proposal Summary Strategic Impact <p>* Selected Project Detail Pages:</p> <ul style="list-style-type: none"> Idea Collection Project Details Schedule <p>Current Item: Idea Collection</p> <p><i>Specify the Workflow Stage Specific Description for the Visible Project Detail Page, and identify w</i> Type the Workflow Stage Specific Description for the Visible Project Detail Page</p>

<p>Name: s5- Post Mortem</p> <p>Description</p> <p>Workflow phase: 4-Finished</p> <p>Visible Project Detail Pages:</p> <ul style="list-style-type: none"> • Post Mortem • Idea Collection • Project Details • Schedule <p>The required fields:</p> <ul style="list-style-type: none"> • Lessons Learned • On Budget • Reasons <p>The read-only fields:</p> <ul style="list-style-type: none"> • Proposed Project Manager • Funding required 																															
<p>Result of the stages creation</p>	<table border="1"> <thead> <tr> <th>Workflow Stage</th> <th>Description</th> <th>Visible Project Detail Pages</th> </tr> </thead> <tbody> <tr> <td>Workflow Phase Name: 1-Create</td> <td></td> <td></td> </tr> <tr> <td>s1- Idea Collection</td> <td>In this workflow stage, information about the proje</td> <td>Idea Collection, Project Deta</td> </tr> <tr> <td>Workflow Phase Name: 2-Select</td> <td></td> <td></td> </tr> <tr> <td>s2- Lead Approval</td> <td>In this workflow stage, the idea is approved or not</td> <td>Idea Collection, Project Deta</td> </tr> <tr> <td>s3- Cancelled</td> <td>The Project Idea is in this stage because it was was</td> <td>Idea Collection, Project Deta</td> </tr> <tr> <td>Workflow Phase Name: 3-Manag</td> <td></td> <td></td> </tr> <tr> <td>s4- Execution</td> <td>The project is under execution. Once all the tasks ir</td> <td>Idea Collection, Project Deta</td> </tr> <tr> <td>Workflow Phase Name: 4-Finise</td> <td></td> <td></td> </tr> <tr> <td>s5- Post Mortem</td> <td>The project has finished execution. In this workflow</td> <td>PostMortem, Idea Collection,</td> </tr> </tbody> </table>	Workflow Stage	Description	Visible Project Detail Pages	Workflow Phase Name: 1-Create			s1- Idea Collection	In this workflow stage, information about the proje	Idea Collection, Project Deta	Workflow Phase Name: 2-Select			s2- Lead Approval	In this workflow stage, the idea is approved or not	Idea Collection, Project Deta	s3- Cancelled	The Project Idea is in this stage because it was was	Idea Collection, Project Deta	Workflow Phase Name: 3-Manag			s4- Execution	The project is under execution. Once all the tasks ir	Idea Collection, Project Deta	Workflow Phase Name: 4-Finise			s5- Post Mortem	The project has finished execution. In this workflow	PostMortem, Idea Collection,
Workflow Stage	Description	Visible Project Detail Pages																													
Workflow Phase Name: 1-Create																															
s1- Idea Collection	In this workflow stage, information about the proje	Idea Collection, Project Deta																													
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s4- Execution	The project is under execution. Once all the tasks ir	Idea Collection, Project Deta																													
Workflow Phase Name: 4-Finise																															
s5- Post Mortem	The project has finished execution. In this workflow	PostMortem, Idea Collection,																													

Figure 24: Steps to create stages

4.7.5 Enterprise Project Type Creation

We create the Enterprise Project Type (EPT): Contoso Project.

Actions	Screen
<p>In Project Web App, after selecting Settings/Server Settings:</p> <p>In the Workflow and Project Detail Pages</p> <p>Select:</p>	

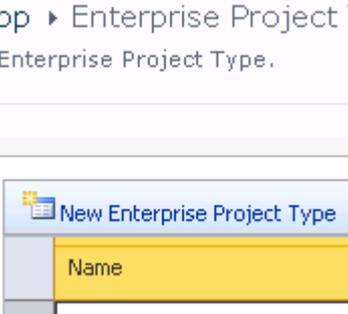
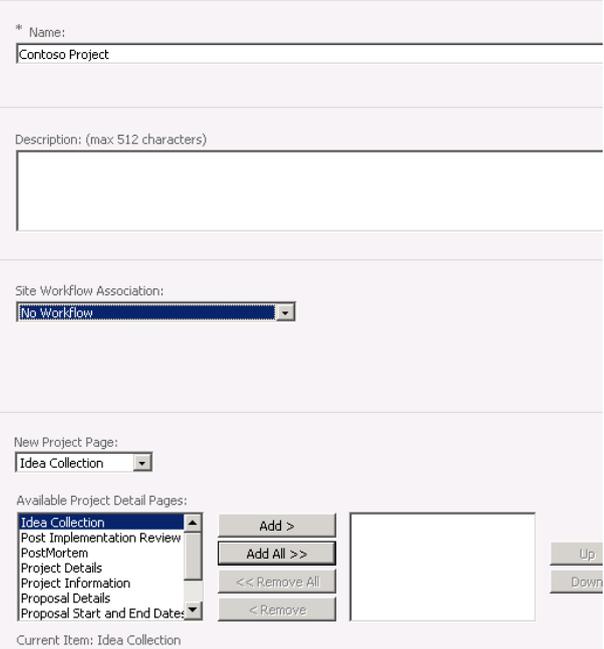
Enterprise Project Types	
Select New Enterprise Project Type	
<p>Enter</p> <p>Name: Contoso Project</p> <p>Description:</p> <p>Site Workflow Association: No workflow</p> <p>New Project Page: Idea Collection</p> <p>No need to select Project Detail Pages</p>	
If you want to specify an image with this EPT, you can specify an URL in a shared document library containing the image	

Figure 25: Steps to create an EPT

In order to be able to choose the Workflow to be associated with this Enterprise Project type, the workflow needs to have been deployed in the Site Collection of Project Web App (see chapter 6.1).

4.7.6 Workflow Approvals Page

A default Workflow Approvals Web page exists. We use this default page in our example. It is named Project Server Approval Content Type.

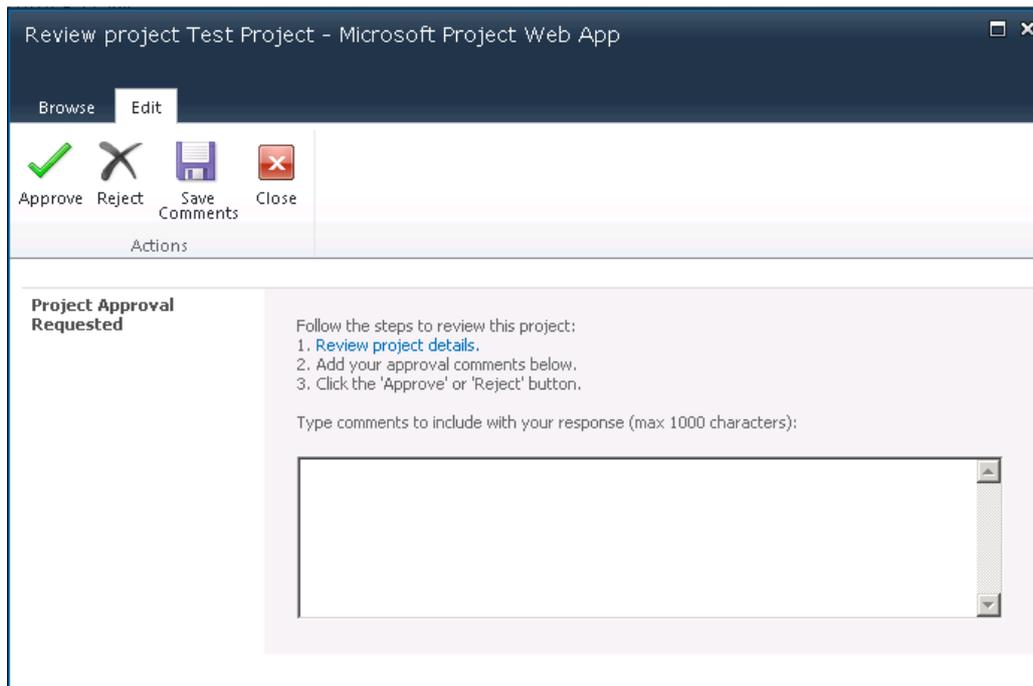


Figure 26: The default Project Server Approval form

5 BUILD/CREATE WORKFLOW ORCHESTRATION

5.1 Workflow Creation, Administration, and Usage Process

The following diagram shows the different processes involved in the creation, administration, and usage of project workflow. It also shows the different actors involved.

The Workflow is created in Visual Studio by a developer.

It is deployed in Project Web App instance by a SharePoint administrator.

By the PWA administrator it is associated with a project EPT.

A user then creates a new project and initiates the workflow.

The workflow starts and waits for user input at the different defined stages.

At one point the workflow terminates.

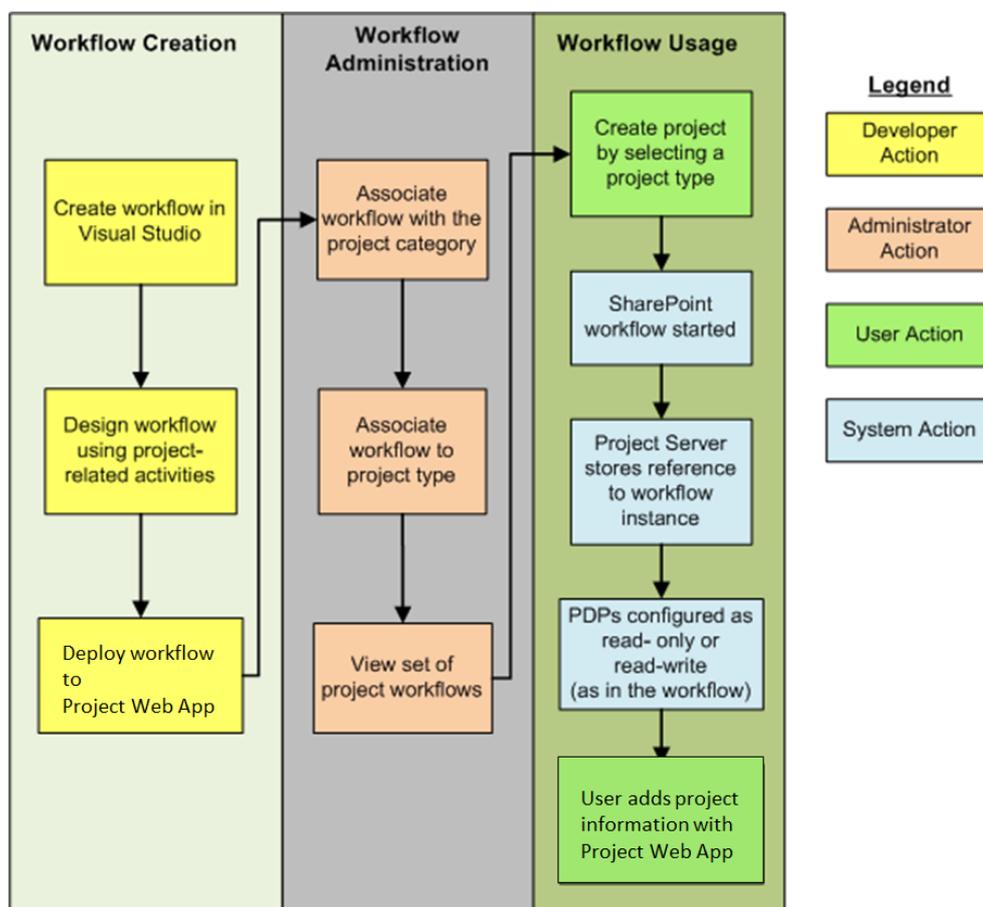


Figure 27: Different actors for managing a workflow

5.2 Workflow Key concepts

The Project 2010 workflows are built from SharePoint 2010 Site Workflows.

SharePoint Workflows are built off of Windows Workflow Foundation, which in turn is built off of Windows .NET Framework 3.5.

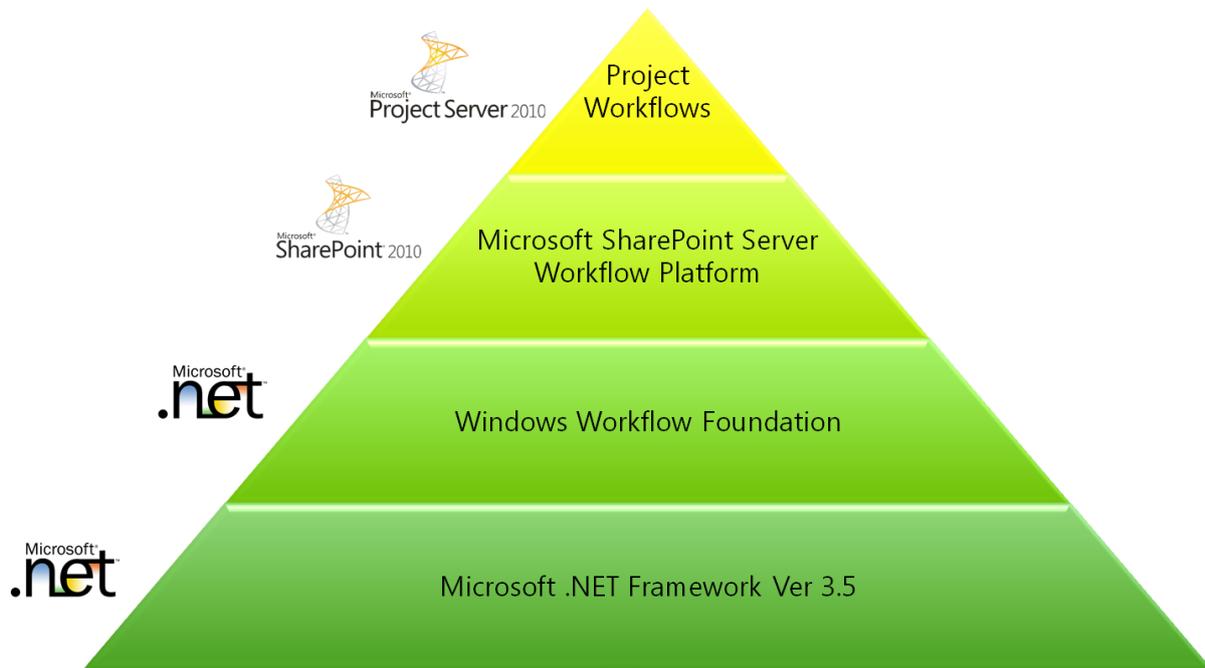


Figure 28: Project Server Workflow technology building blocks hierarchy

The workflows are made up of workflow activities that are objects with code within it. The workflow engine will go for activity to activity and execute the code within each of them.

The project workflows have to be designed using the Workflow Designer of Visual Studio 2010.

By using the new features of Visual Studio 2010, the workflow can be packaged and deployed like SharePoint Server features.

The workflow services can use different type of activities that are summarized in this diagram:

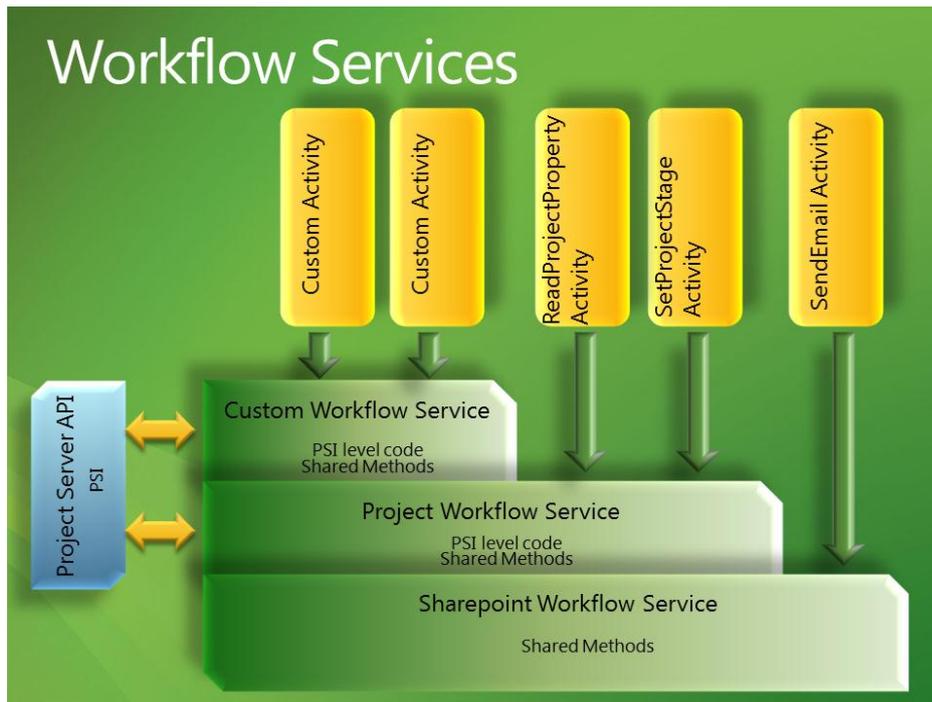


Figure 29: Project Server workflow services

The specific Project workflow activities are listed in chapter 5.9.2. These Project activities are using internally Project Workflow services that are calling the standard PSI API. If you define your own custom activities you can also use the Project Server API using PSI.

5.3 Relations between Project Server Objects and Visual Studio orchestration

The relation between the Project Server objects and the Visual Studio workflow orchestration is illustrated in this diagram:

Visual Studio to Project Server

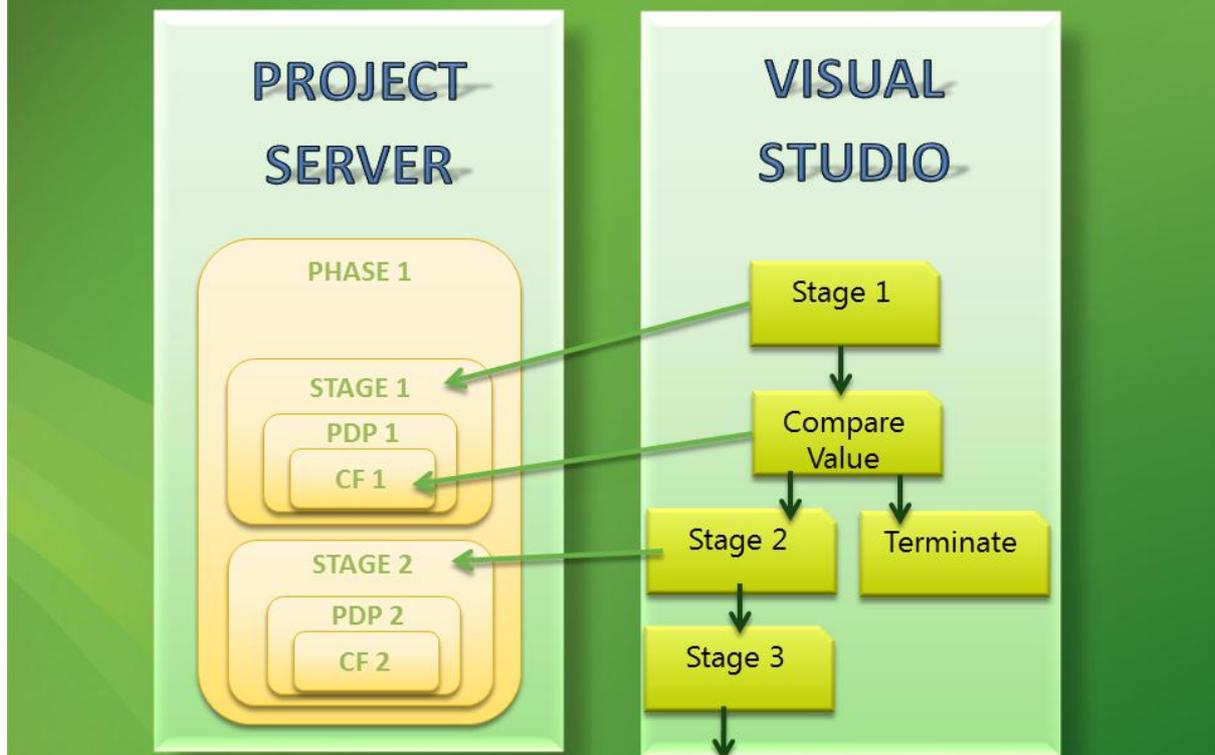


Figure 30: Relation between Project Server and Visual Studio objects

The Custom Fields (CFs) are user input fields that can be used in Visual Studio code to make a decision based on the value or to store the value.

The Project Detail Pages (PDPs) are Web Part pages that hold Custom Fields.

The Stages hold one or more PDPs.

The Phases group Stages together.

So from a user perspective, as the user goes from stage to stage he/she is exposed to a different set of pages, of which we expose different types of information.

And it is the workflow that decides which stages will appear, and in what order, based on the sequence you have defined with the Visual Studio designer.

In this diagram you see how when you are creating the workflow from within Visual Studio you reference the different objects that reside within Project Server.

- In this example, we have an activity at the top that points to Stage 1; this tells the workflow that Stage 1 should be displayed first.
- The following activity does an If/Else logic based off a value found within a CF. And then, depending on that outcome, we have additional activities that either point to different stages or terminate the workflow.

-
- So the key point is that you do not set the stage order inside of Project Server. Project Server has no idea what orders these stages that reside within it should be in. The ordering is completely dictated by the workflow, and this is the orchestration of the workflow.

5.4 Development Tasks with Visual Studio 2010

Here is the list of all the basics tasks that need to be done to start developing a workflow with Visual Studio 2010.

Initial steps

- Install SharePoint Server 2010, Project 2010, and Visual Studio 2010 on a single server. This is described on TechNet: <http://technet.microsoft.com/en-us/library/cc197667.aspx>
- Configure Visual Studio 2010 for Project 2010 Workflow development. This is described in the Project Server SDK on MSDN: <http://msdn.microsoft.com/en-us/library/ee767686.aspx>
 - Use .NET Framework 3.5
 - Must be installed on the same computer as Project Server
 - Developer must have administrative rights on the server computer and SharePoint farm.
 - Define your activities Toolbox
 - Add Project Server Workflow activities
 - Add SharePoint Server Workflow activities

Use Visual Studio 2010

- Visual Studio 2010 must be started as an administrator
- Create a project of type Sequential Workflow
 - The necessary libraries are added as reference to your Visual Studio project.
- Define variables to store the GUID of Project Server objects like
 - Custom Fields
 - Lookup Table Values
 - Stage
 - Group or Specific Resources
- Define Workflow in Visual Studio 2010 using the Designer tool
 - Use only Sequential Workflow
 - Add activities
- Build
- Deploy on local server
- Create/Update the EPT in Project Server that uses this workflow
- Debug/Test your workflow

How to redeploy an updated version => use a script (See chapter 5.7)

- Stop services and IIS
- Update in the GAC
- Restart services

5.5 List of the objects to create in Visual Studio 2010

The following objects are created in Visual Studio 2010 to define the orchestration of the workflow for our example.

Objects	List
■ Project Workflow	SequentialWorkflowActivity
■ Project Server Activities	ProjectSequence SetProjectStage OnProjectSubmit ReadProjectProperty ReadProjectSecurityGroupMembers UpdateProjectStageStatus CompareProjectProperty
■ SharePoint Server Activities	OnWorkflowActivated OnTaskAssigning OnTaskProcessStarted EndTaskProcess SendEmail SetTaskField OfficeTask (Approval) CheckExitConditions
■ Workflow Activities	IfElseBranchActivity IfElseActivity SequenceActivity CodeActivity TerminateActivity
■ Custom activities	GrantPermissionsToProject
■ Variables to store GUID	IdeaCollectionStageUid LeadApprovalStageUid CancelledStageUid SelectionStageUid

ExecutionStageUid
 PostMortemStageUid
 ScheduleProjectUid

 FundingRequiredUid
 FundingRequiredYesLTValueUid

 ProjectManagerUid

Figure 31: List of Visual Studio objects to create/use

These different activities will be detailed in the following chapters.

You can also create some custom Web Parts that you can use in your PDP pages, but this out of the scope of this document.

5.6 How to (In Visual Studio 2010)

5.6.1 Setting up the toolbox in Visual Studio

You need to add some specific objects to the Toolbox, to ease the development of the Project Server workflow.

By default the Toolbox has the following tabs:

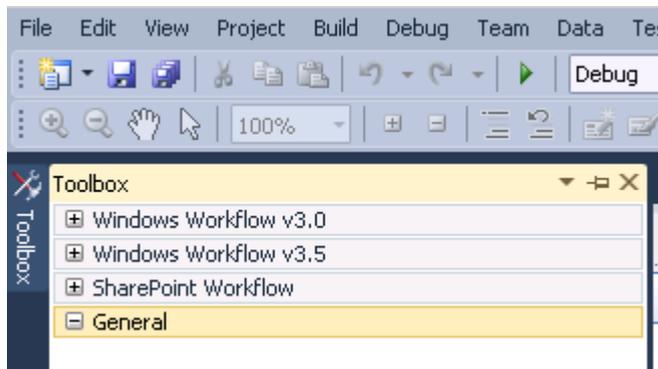


Figure 32: Updating the Visual Studio Toolbox

In order to design our workflow we have to add two tabs to the Visual Studio Toolbox.

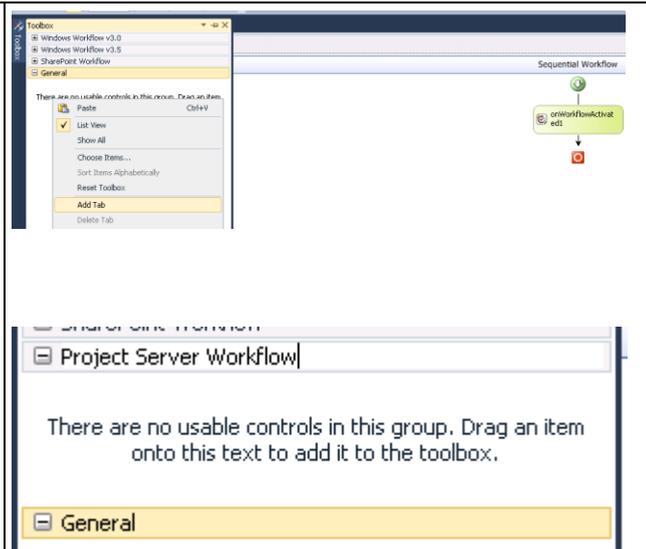
- Project Server Workflow Activities
- SharePoint Server Workflow Activities

This procedure is described in detail in MSDN here: [http://msdn.microsoft.com/en-us/library/ee767686\(v=office.14\).aspx#pj14](http://msdn.microsoft.com/en-us/library/ee767686(v=office.14).aspx#pj14) ConfiguringVS2010 ProjectServerTab

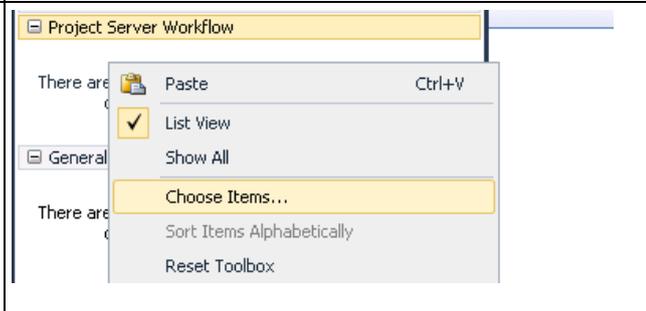
Actions

Screen

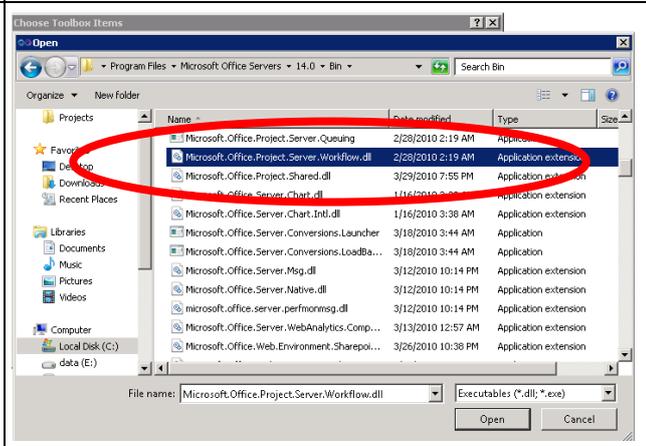
- In Visual Studio Solution Explorer, expand the Workflow1 node, and then double-click the Workflow1.cs file to open the Sequential Workflow design view. On the View menu, click Toolbox, and then pin the Toolbox pane open.
- Right-click a blank area in the Toolbox pane, and then click Add Tab. For example, name the tab Project Server – Workflow.



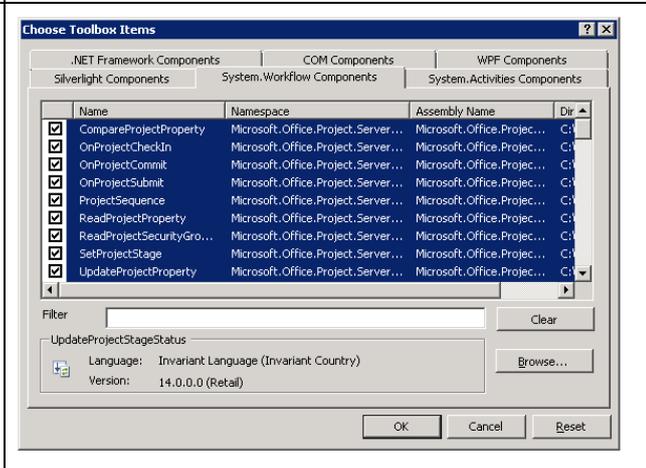
- Right-click under Project Server Workflow and select Choose Items within the newly created tab.



- In the Choose Toolbox Items dialog box, click the System.Workflow Components tab, and then click Browse. Navigate to the Microsoft.Office.Project.Server.Workflow.dll assembly in [Program Files]Microsoft Office Servers\14.0\Bin, and then click Open.



- The ten specific Project Server Activities highlighted are added to the toolbox tab after you select OK.



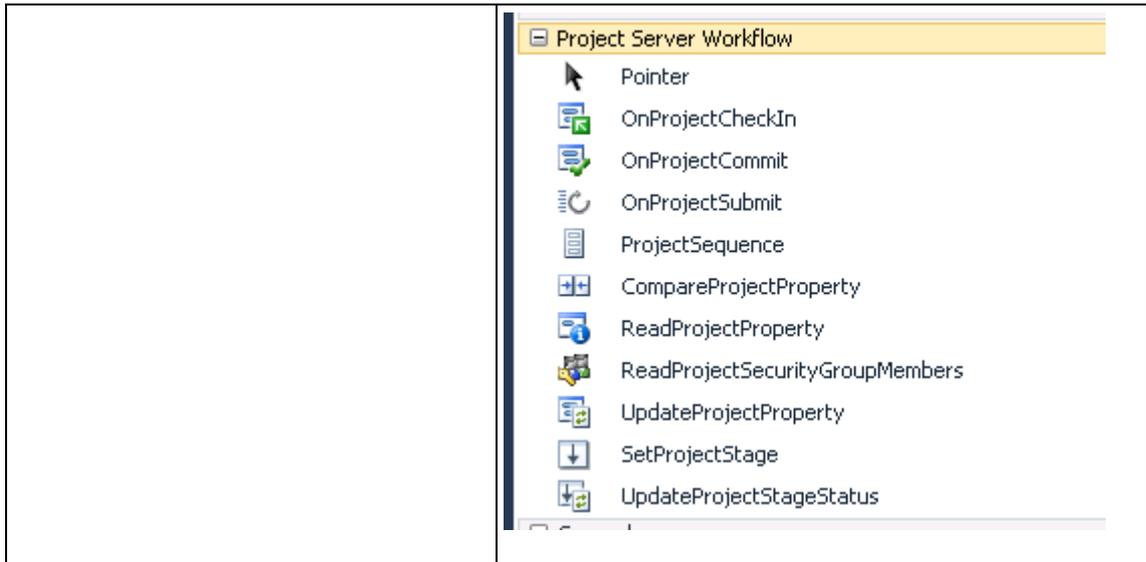
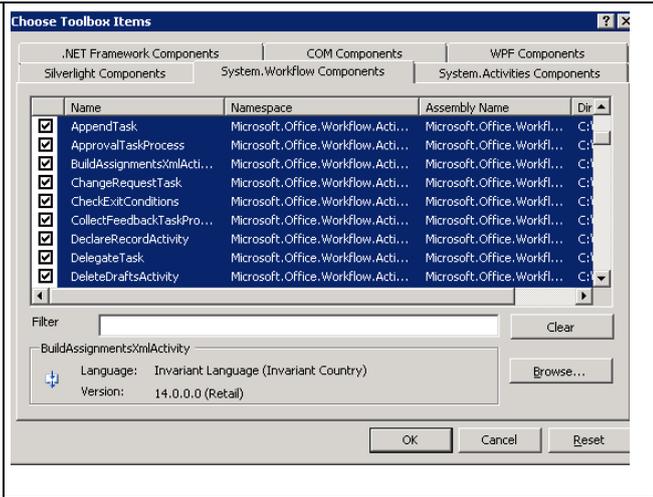


Figure 33: Steps to update the Visual Studio toolbox for Project Server Activities

Do the same from the SharePoint Server Workflow Activities.

Action	Screen
<ul style="list-style-type: none"> - Create a new tab and name it SharePoint Server Workflow. 	
<ul style="list-style-type: none"> - Select the assembly: Microsoft.Office.Workflow.Actions.dll from the Directory [Program Files]\Common Files\Microsoft Shared\Web Server Extensions\14\ISAPI 	

- The specific Office Workflow Activities highlighted are added to the toolbox tab after you select OK.



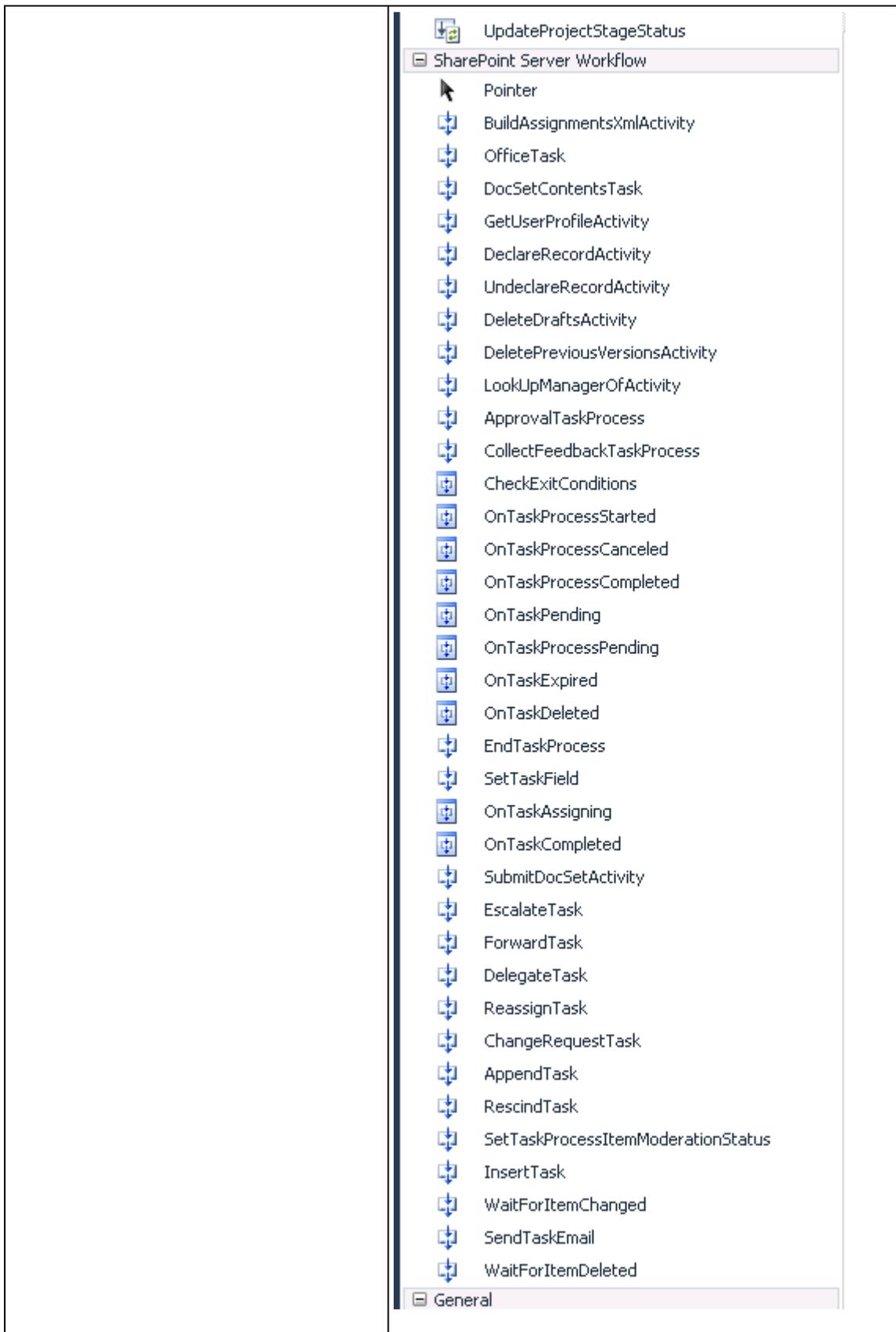
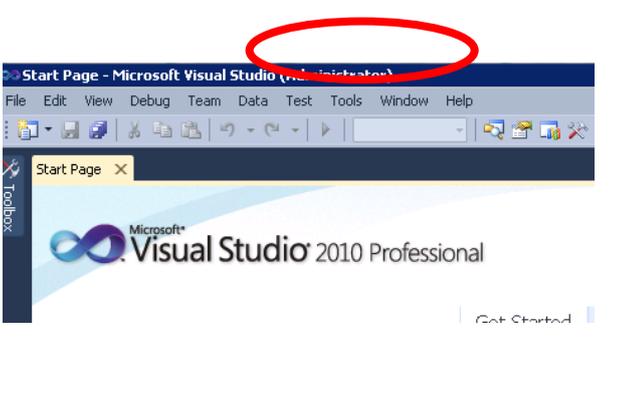
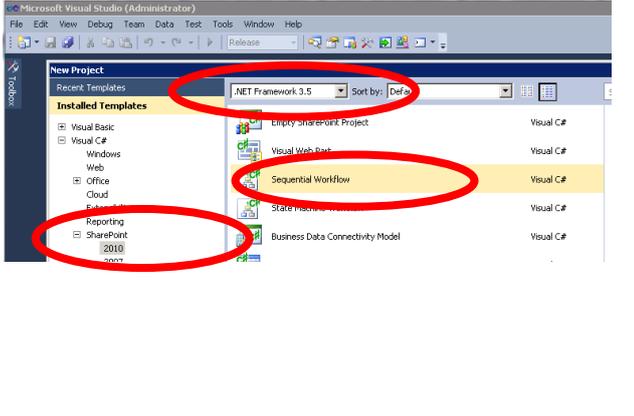
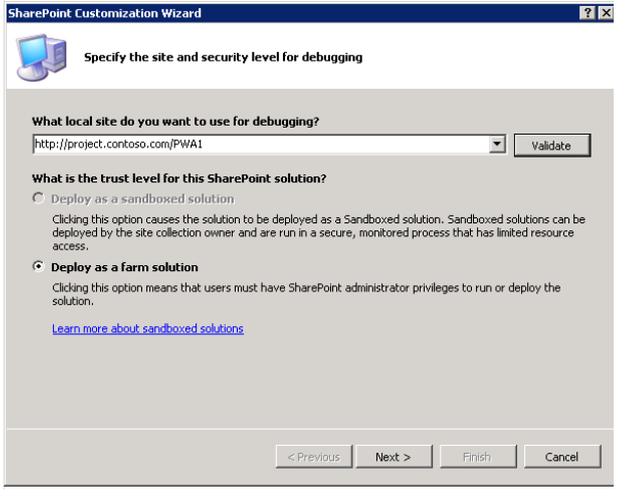
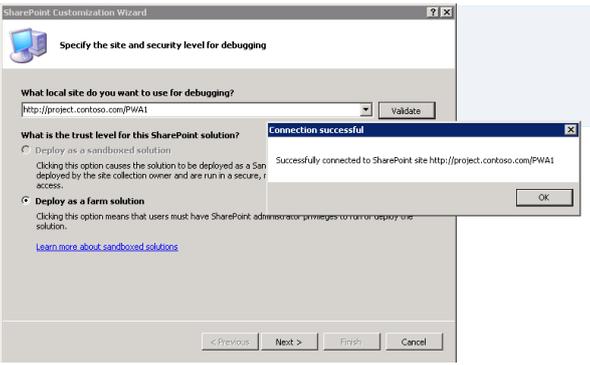
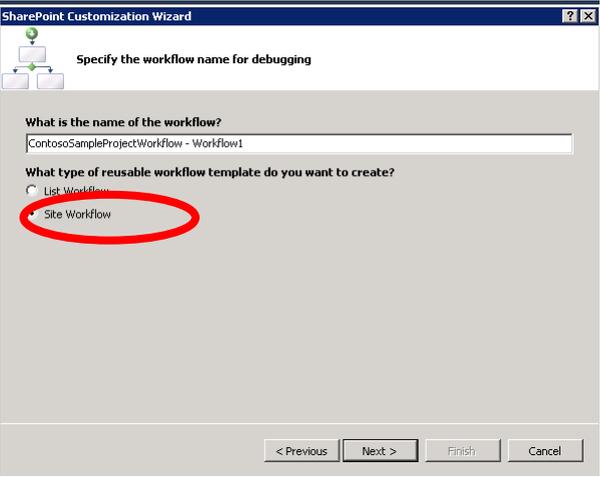
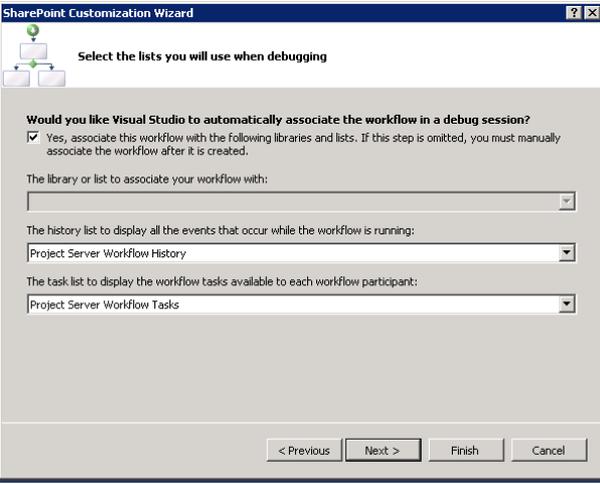


Figure 34: Steps to update the Visual Studio toolbox for SharePoint Server Activities

5.6.2 Creating a new Project

To create a new Visual Studio 2010 project so that you can create Project 2010 workflows:

Actions	Screen
<ul style="list-style-type: none"> - Start Visual Studio 2010 connected as an administrator 	
<ul style="list-style-type: none"> - Create a new project, choosing the following template: SharePoint 2010 Workflow Sequential And .Net Framework 3.5 	
<ul style="list-style-type: none"> - And selecting a name for the project workflow: here ContosoSampleProjectWorkflow 	
<ul style="list-style-type: none"> - This starts the SharePoint Customization Wizard - Define the server where the workflow will be initially deployed - Enter the URL: here http://project.contoso.com/PWA1 and select the Validate button - You must choose Deploy as a farm solution. 	

<ul style="list-style-type: none"> - A connection to the server is validated. - Select the Next button. - 	
<ul style="list-style-type: none"> - Enter the name of the workflow (or use the one proposed): Here ContosoSampleProjectWorkflow - Workflow1 - And select Site Workflow. - Click Next. 	
<ul style="list-style-type: none"> - Keep the default proposed values and click Next. - <i>Note:</i> If you want to define your own custom approval tasks library, you could choose your specific task lists here. By default it uses the default task approval library created with the Project Web App instance. 	

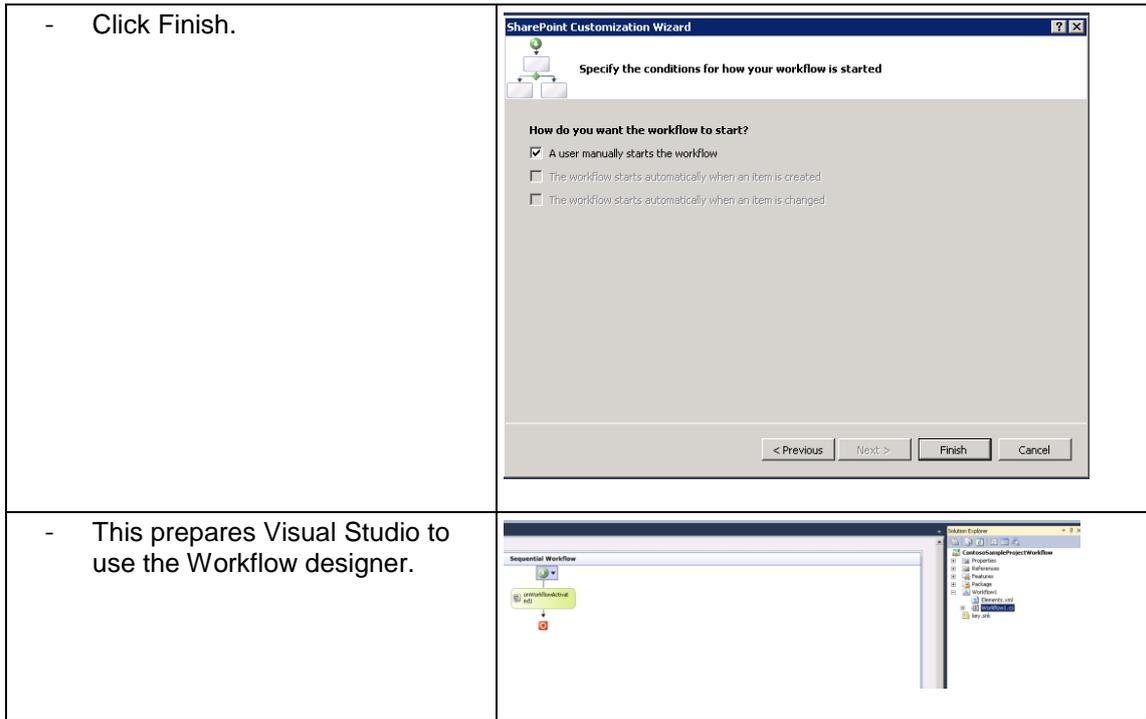
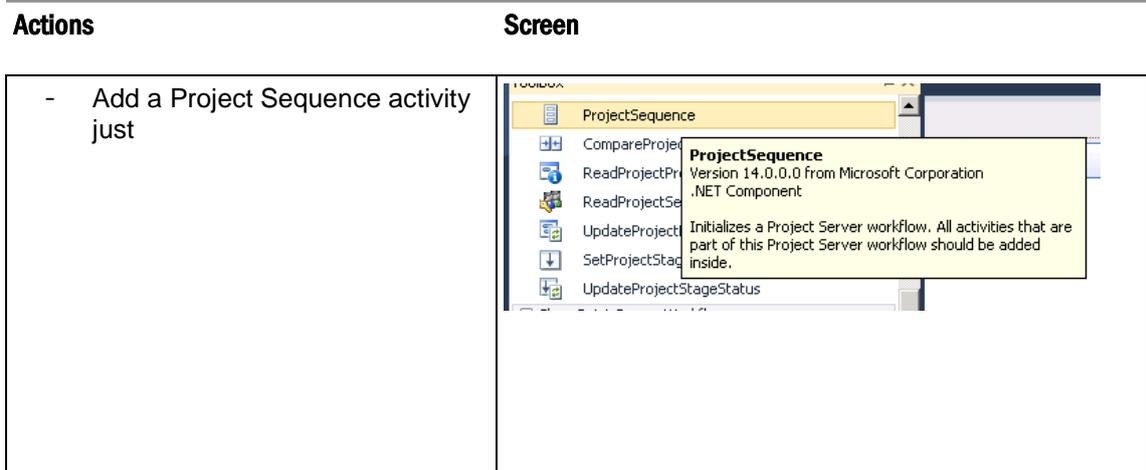
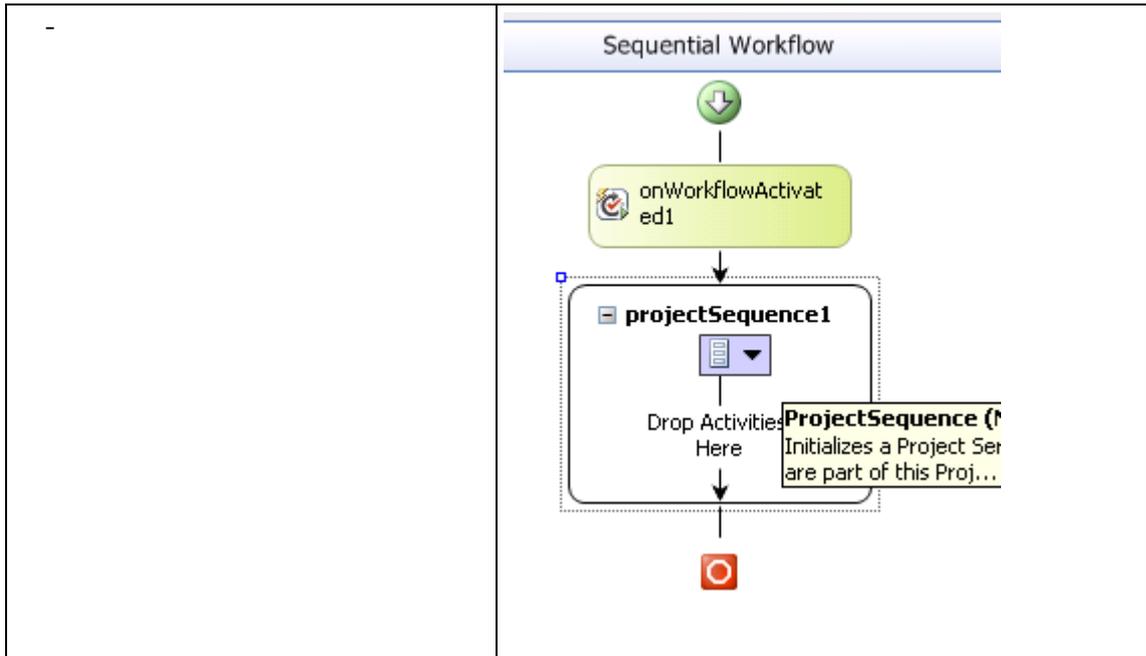


Figure 35: Steps to create a Visual Studio project for Project Server workflows

5.6.3 Initial Step

The first activity you must put in your Project Server workflow is the wrapper ProjectSequence Activity, which will contain all your workflow activities.

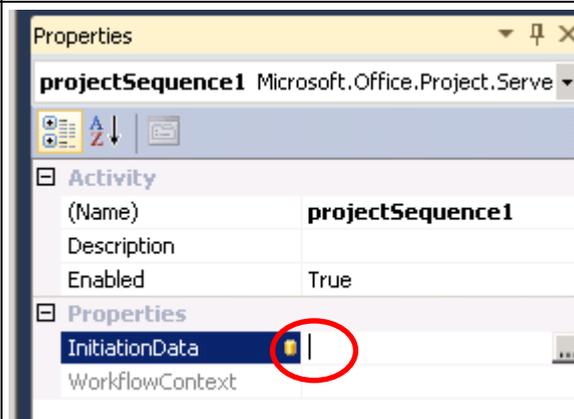




Bind the necessary properties:

InitiationData

Select the yellow icon to bind the InitiationData Property to the workflow.



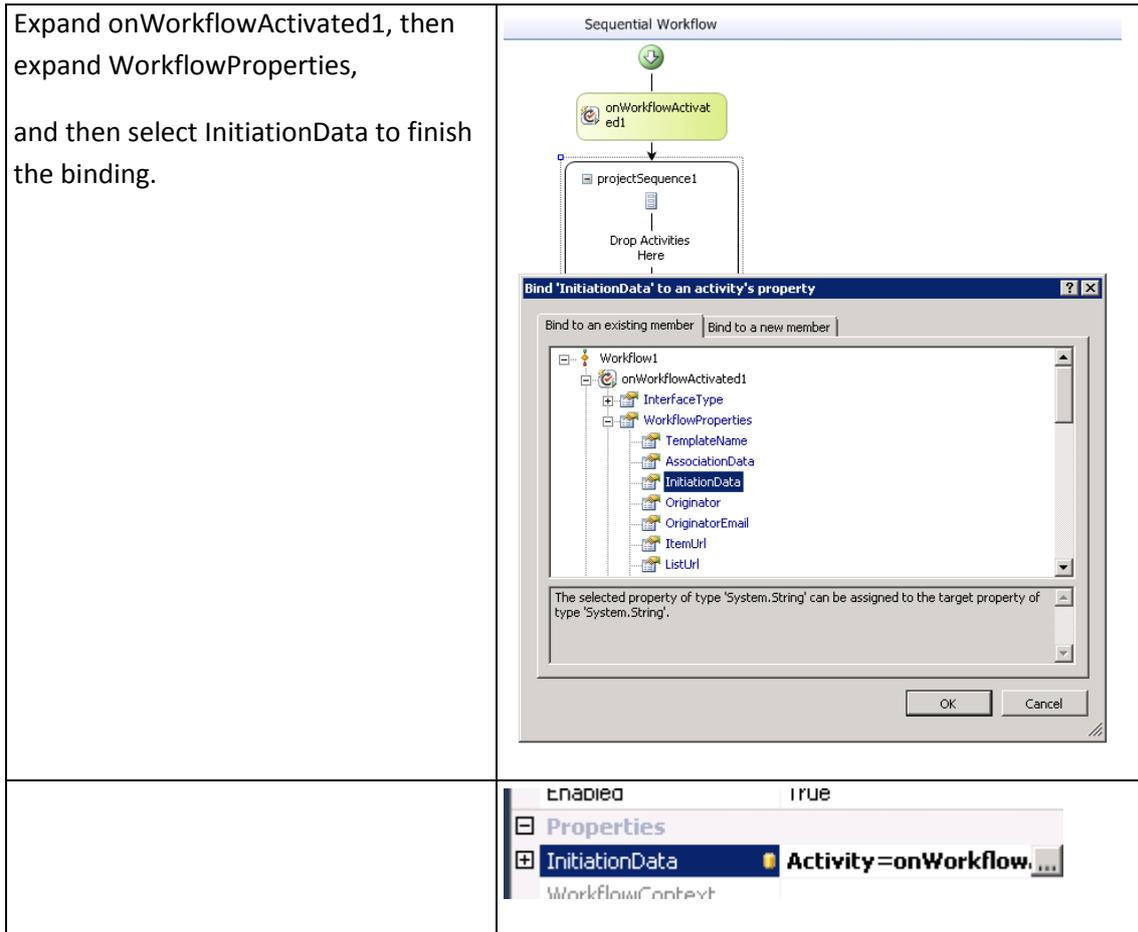
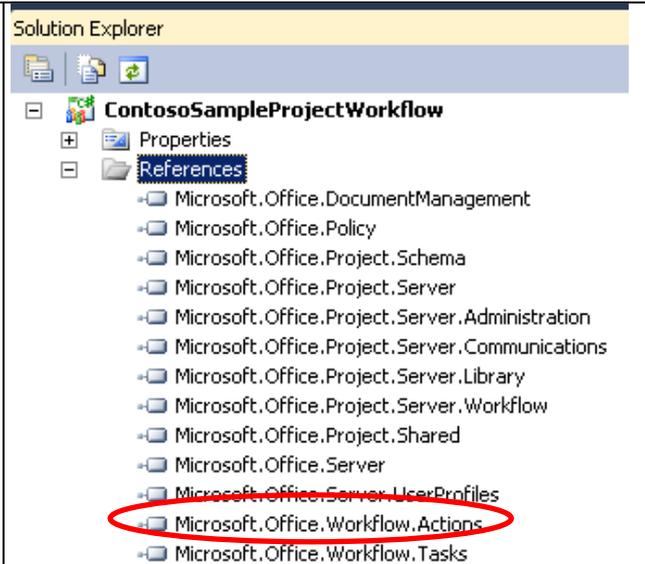


Figure 36: Steps to insert the initial activities in the Visual Studio project

5.6.4 Adding more activities with the designer

Actions	Screen
<p>Open the generated Workflow1.cs source file</p> <p>Update the Using clause</p>	<pre>using Microsoft.Office.Project.Server.Library; using System.Text;</pre>

Add a reference to the library:
Microsoft.Office.Workflow.Actions



Add the code to hold the GUID variables.
Currently the GUID are set to null value; they will be completed later

```
#region Variables
//workflow stages used in this workflow
public Guid IdeaCollectionStageUid = new
Guid("00000000-0000-0000-0000-000000000000");
public Guid LeadApprovalStageUid = new
Guid("00000000-0000-0000-0000-000000000000");
public Guid CancelledStageUid = new
Guid("00000000-0000-0000-0000-000000000000");
public Guid ExecutionStageUid = new
Guid("00000000-0000-0000-0000-000000000000");
public Guid PostMortemStageUid = new
Guid("00000000-0000-0000-0000-000000000000");

//Funding Required
public Guid FundingRequiredUid = new
Guid("00000000-0000-0000-0000-000000000000");
public Guid FundingRequiredYesLTValueUid
= new Guid("00000000-0000-0000-0000-
000000000000");
public bool RequiresFundingResult;

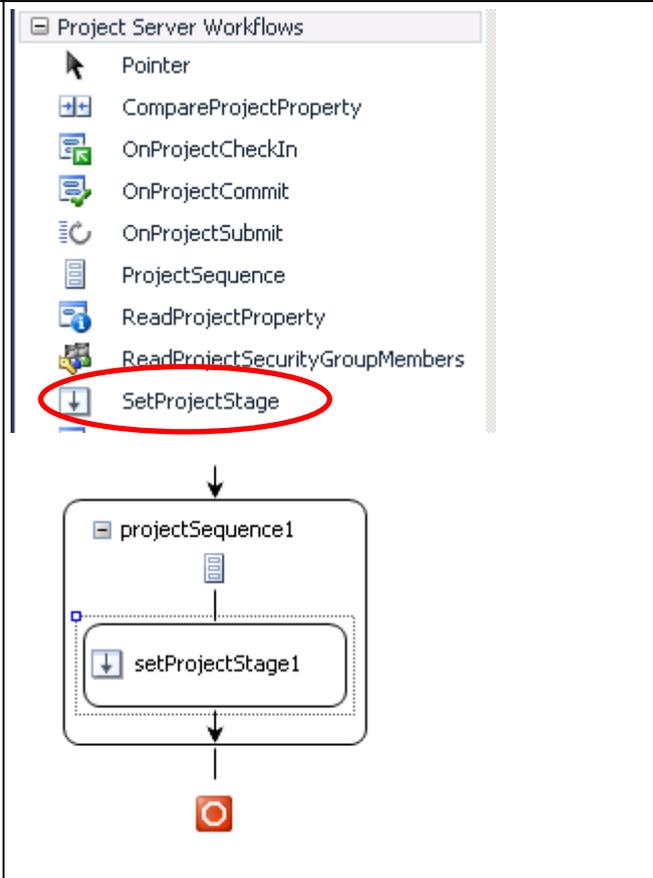
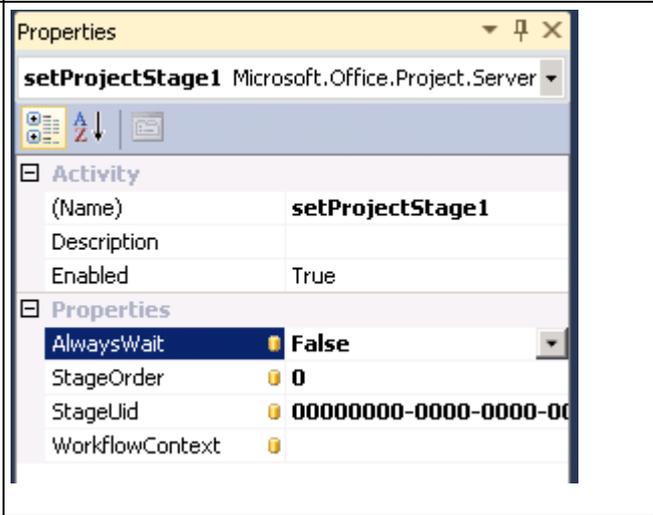
//Project Manager
public Guid ProjectManagerUid = new
Guid("00000000-0000-0000-0000-000000000000");

//office task variables
public String officeTaskOutcomes =
"Approved, ;Rejected,";
public bool approvalResult = false;
public Object TaskTitle = new
System.Object();
// this is the Approval ContentTypeID of
the Project Server Approval form
public String
ProjectServerApprovalContentTypeID =
"0x0108010038A52C27344148C9B9214F82C7C02985";

//user group used for approval -
PSSecurityGroup.Team Leads
public Guid TeamLeadGroup = new
System.Guid(PSSecurityGroup.TeamLeads.ToString());
;

public string[] TeamLeads;

//for send email activity
public String[] projectName =
default(System.String[]);
public String[] projectOwnerEmail =
default(System.String[]);
```

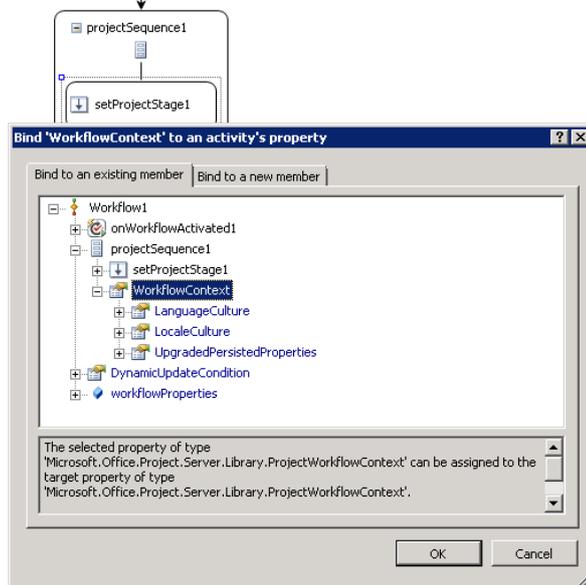
	<pre>public String[] ProjectOwnerDisplayName = default (System.String[]); #endregion</pre>
<p>Set up the project stage by adding a SetProjectStage activity.</p> <p>The SetProjectStage Activity can be found in Project Server Workflow Toolbox.</p>	 <p>The screenshot shows the 'Project Server Workflows' toolbox with the 'SetProjectStage' activity highlighted with a red circle. Below the toolbox, a diagram shows a workflow sequence named 'projectSequence1' containing a 'setProjectStage1' activity, with a red play button icon below it.</p>
<p>Set up some properties</p>	 <p>The screenshot shows the 'Properties' window for the 'setProjectStage1' activity. The 'AlwaysWait' property is set to 'False'. Other properties include 'StageOrder' (0), 'StageLid' (00000000-0000-0000-0000-000000000000), and 'WorkflowContext'.</p>
<p><u>AlwaysWait</u>: set to True will stop the workflow at this stage.</p> <p>The workflow will also stop (even if set to False) if there are Required Custom fields that need to be filled in by the user.</p>	

StageOrder: Set the order in which the Workflow is shown on the Workflow Status Page. We can use the numbering that was defined in the stage names.

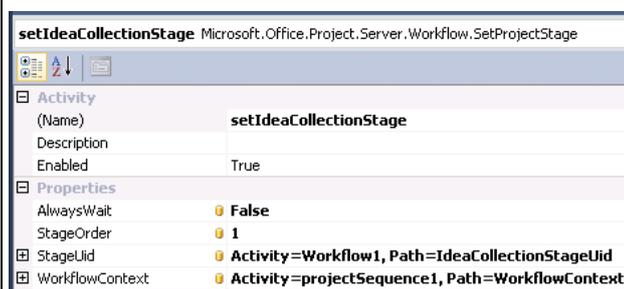
StageUid: Define the Guid of the Project stage coming from the Project Server configuration.

Either using a direct value (only for a quick test) or Using a local variable (better for clarity and maintenance)

WorkflowContext: Set the workflowContext of the activity by selecting **ProjectSequence1.WorkflowContext**



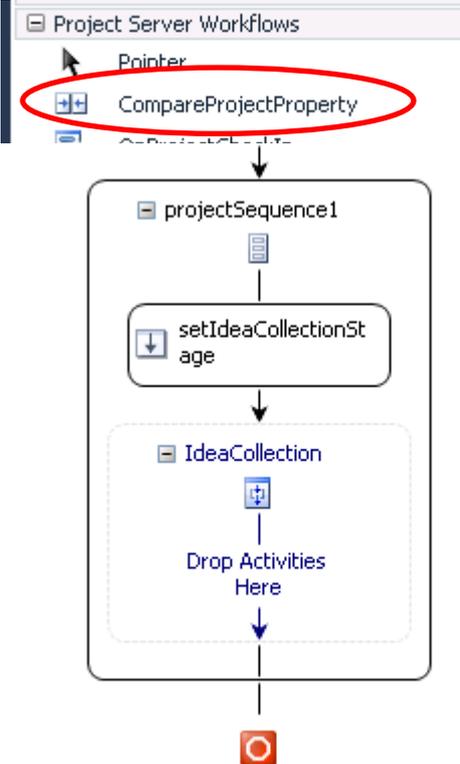
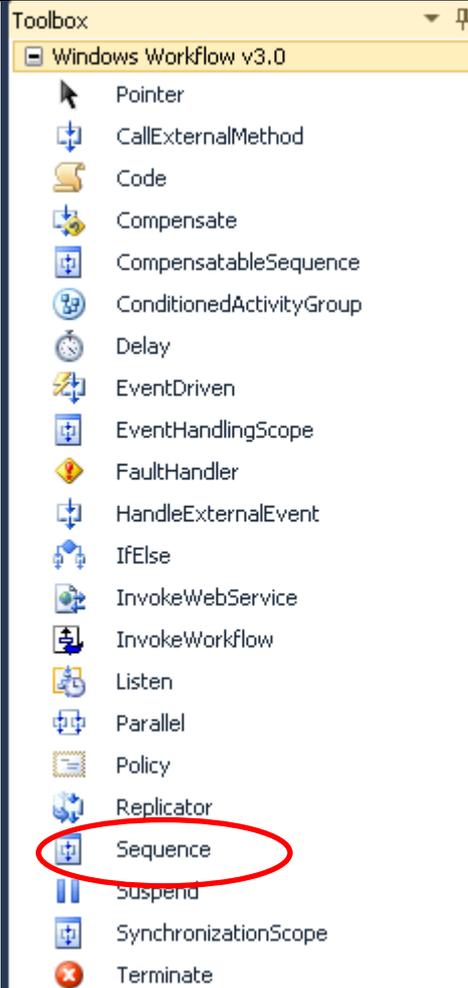
Properties

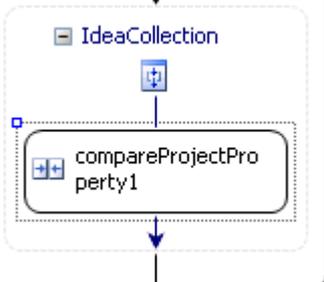
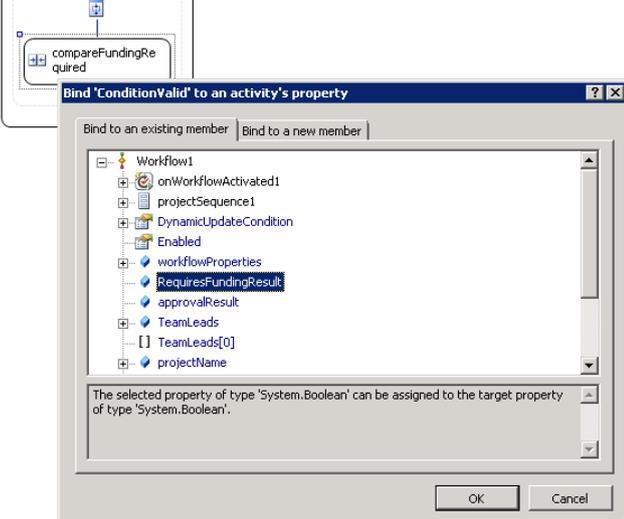
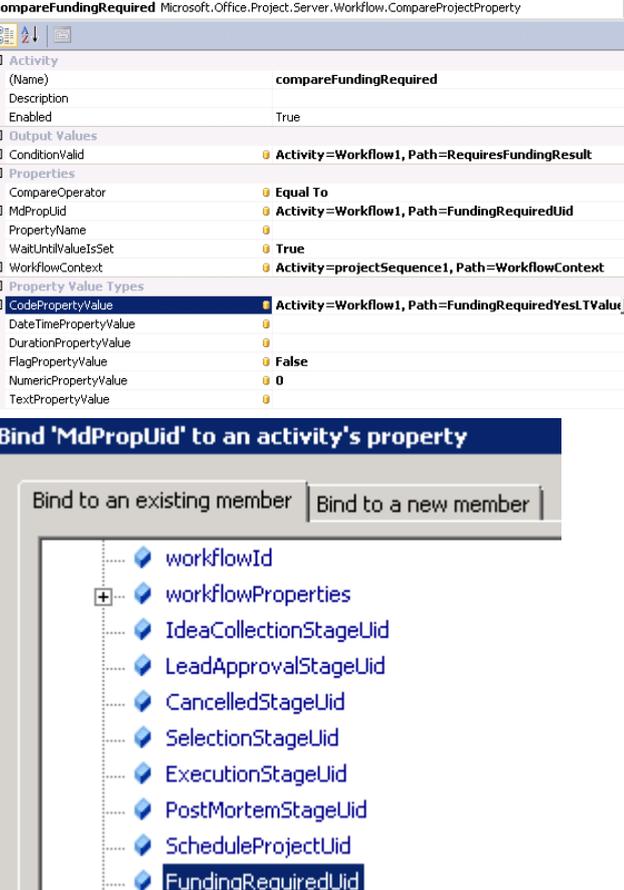


In the designer, add an activity to create a sequence activity that will contain a compare activity.
CompareProjectProperties

The SequenceActivity can be found in the Windows Workflow v3.0 toolbox.

The Compare Activity can be found in Project Server Workflow Toolbox (that you added earlier).



	
<p>Fill up the values</p> <p>Name: CompareFundingRequired</p>	
<p>MDPropUI to our variable</p> <p>FundingRequiredUID</p> <p>WaitUntilValueIsSet to True</p> <p>WorkflowContext to our ProjectSequence Workflow context</p> <p>CodePropertyvalue to FundingRequiredYesLTValueUID</p>	

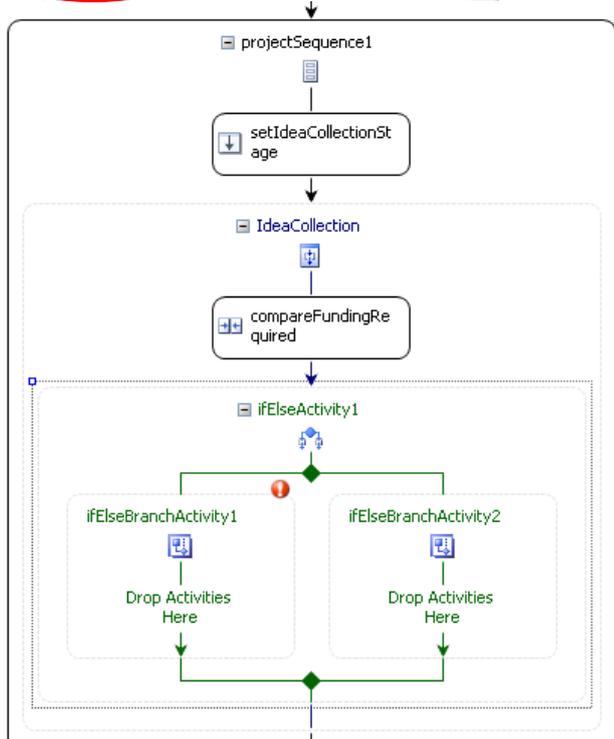
compareFundingRequired Microsoft.Office.Project.Server.Workflow.CompareProjectPrope

Activity	
(Name)	compareFundingRequired
Description	
Enabled	True
Output Values	
Condition/Valid	Activity=Workflow1, Path=RequiresFunding
Properties	
CompareOperator	Equal To
MdPropId	Activity=Workflow1, Path=FundingRequired
PropertyName	
WaitUntilValuesSet	False
WorkflowContext	Activity=projectSequence1, Path=Workflow
Property Value Types	
CodePropertyValue	Activity=Workflow1, Path=FundingRequ...
DateTimePropertyValue	
DurationPropertyValue	

Add an IfElseActivity from the Windows Workflow 3.0 Toolbox

Windows Workflow v3.0

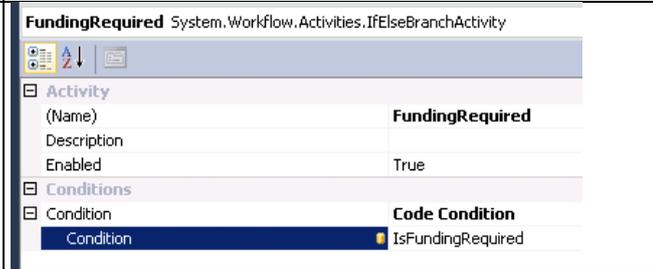
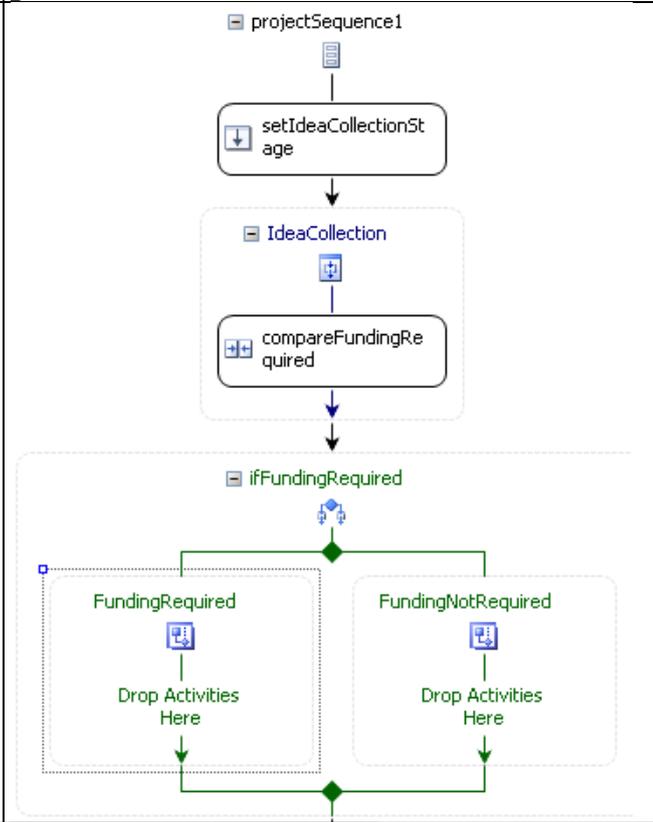
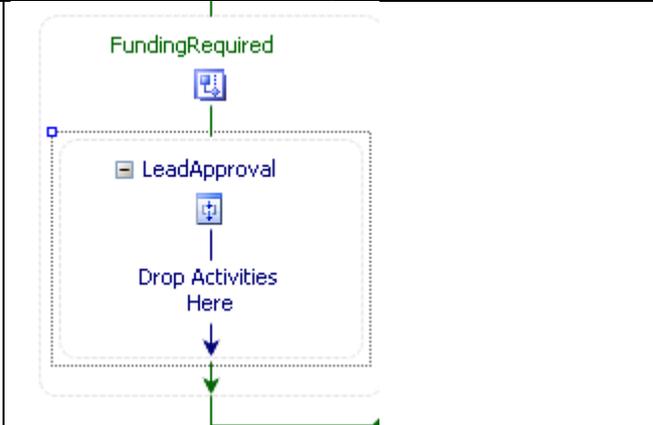
- Pointer
- CallExternalMethod
- Code
- Compensate
- CompensatableSequence
- ConditionedActivityGroup
- Delay
- EventDriven
- EventHandlingScope
- FaultHandler
- HandleExternalEvent
- IfElse**

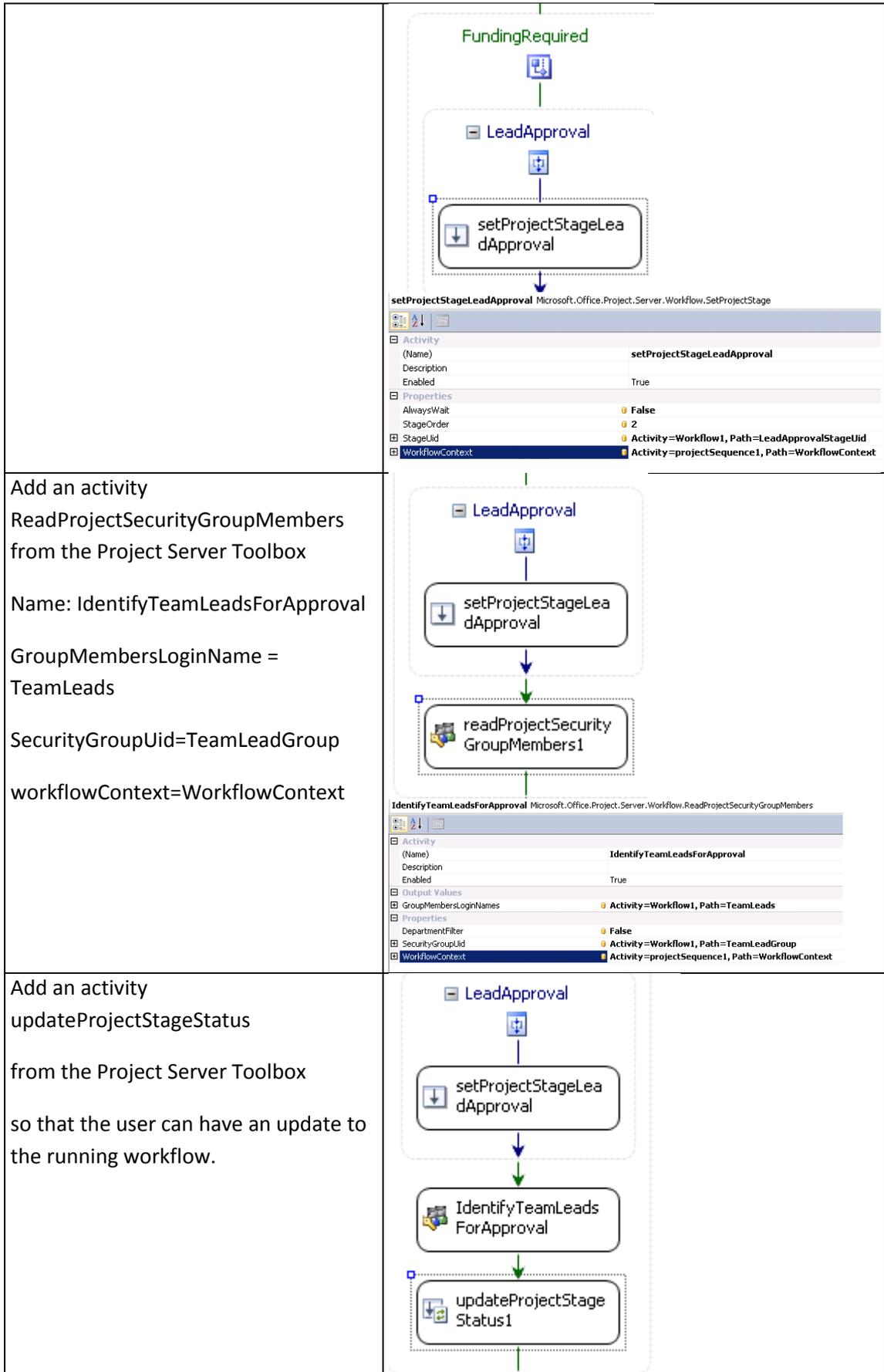


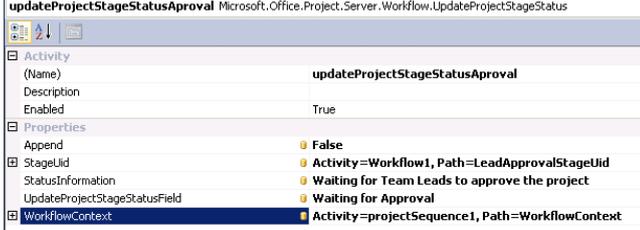
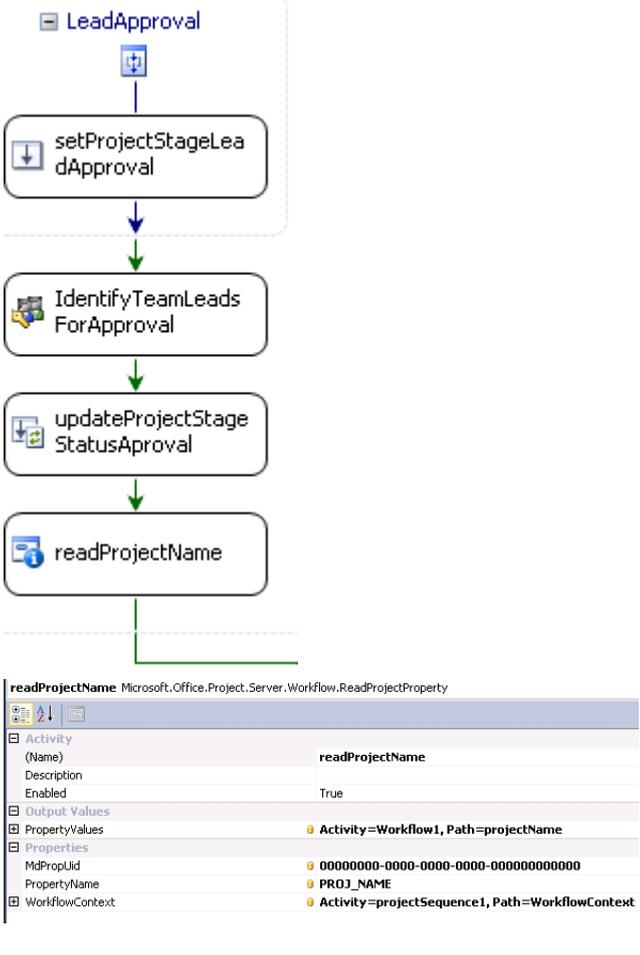
Implement a function to test the condition

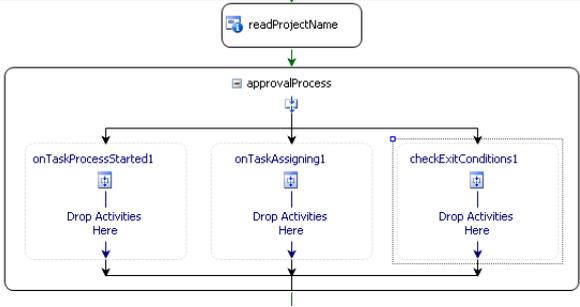
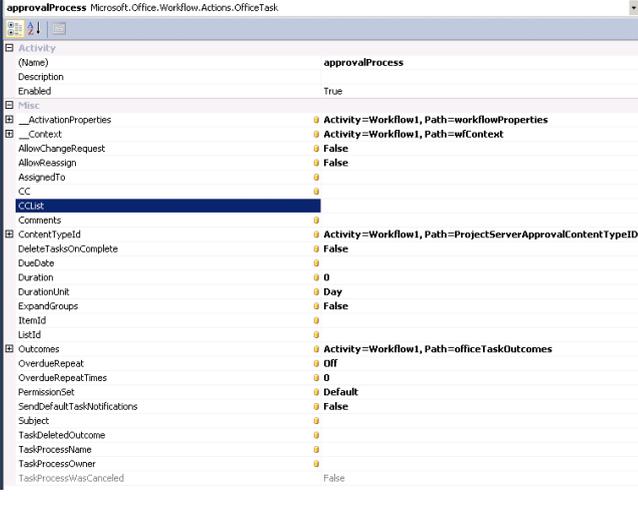
Properties System.Workflow.Activities.IfElseBranchActivity

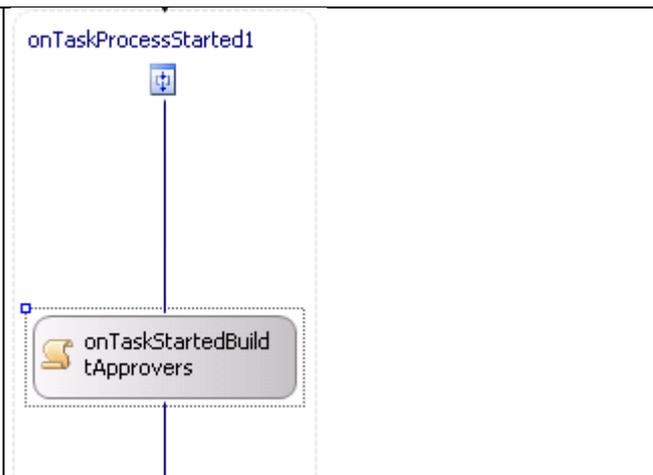
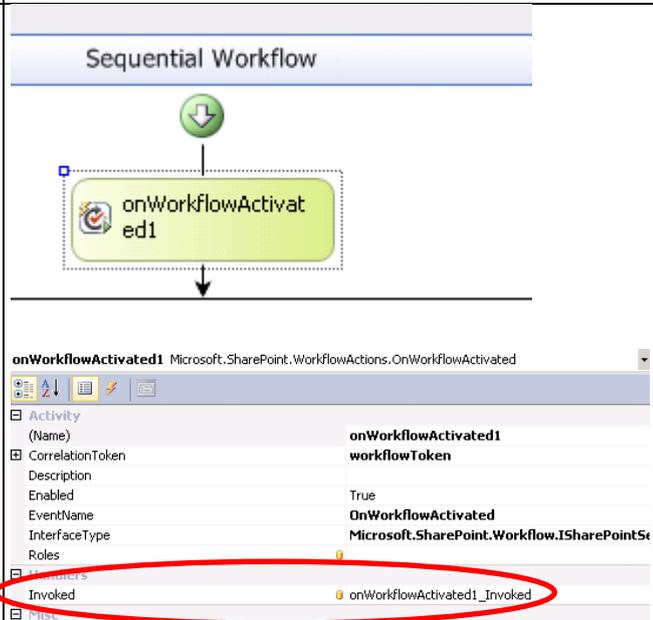
Activity	
(Name)	FundingRequired
Description	
Enabled	True
Conditions	
Condition	Code Condition
Condition	

<p>The Code to add for the function:</p> <p>IsFundingRequired</p>	<pre>#region TestFunding Required private void IsFundingRequired(object sender, ConditionalEventArgs e) { e.Result = RequiresFundingResult; } #endregion</pre>
	
	
<p>Add a Sequence Activity for the LeadApproval Stage</p>	
<p>setProjectStage for Lead Approval</p>	



	
<p>Add an activity ReadProjectProperty from the Project Server Toolbox</p> <p>Set the values for:</p> <p>Name</p> <p>PropertyValues</p> <p>PropertyName</p> <p>Workflowcontext</p>	
<p>Add some code for handling workflow Context and the variable wfContext.</p> <p>Update the Dispose method and the default constructor</p>	<pre> public Workflow1() { wfContext = new Microsoft.SharePoint.WorkflowActions.WorkflowCont ext(); InitializeComponent(); } public SPWorkflowActivationProperties workflowProperties { get; set; } // to manage the workflow Office Tasks public Microsoft.SharePoint.WorkflowActions.WorkflowCont ext wfContext { get; set; } protected override void Dispose(bool disposing) </pre>

	<pre> { base.Dispose (disposing) ; if (disposing) { wfContext.Dispose () ; workflowProperties.Dispose () ; } } </pre>
<p>Add an activity, OfficeTask, from the SharePoint Server Toolbox</p> <p>for handling the approval of the project.</p> <p>Add the three activities from the SharePoint Server Toolbox :</p> <p>OnTaskProcessedStarted</p> <p>OnTaskAssigning</p> <p>CheckExitConditions</p>	
<p>Initialize the different fields for the Office Task</p> <p>Name: approvalProcess</p> <p>__ActivationProperties: workflowProperties</p> <p>__Context: wfContext</p> <p>ContentTypeId: ProjectServerApprovalContentTypeID</p> <p>Outcomes: officeTaskOutcomes</p>	

<p>In the onTaskProcessStarted add a Code Activity from the Windows Workflow toolbox and name it:</p> <p>onTaskStartedBuildApprovers</p>	
<p>Initializing the workflow context objects with the method onWorkflowActivated1_Invoked</p>	<pre>private void onWorkflowActivated1_Invoked(object sender, ExternalDataEventArgs e) { wfContext.Initialize(workflowProperties); }</pre>
<p>Bind this method with the Invoked Handlers in the onWorkflowActivated1 Action</p>	
<p>Code for Approval Process:</p> <p>Method <code>BuildApprovers</code> to assign a task to all the approvers in the TeamLeads security group.</p> <p>Method <code>FormatApprovers</code> to build the string for the Office Task for each approver</p> <p>Method <code>VerifyExitCondition</code> to check the exit condition for the task</p> <p>Method <code>IfIdeaNotApproved</code> to get approval status</p>	<pre>#region Approval process private void BuildApprovers(object sender, EventArgs e) { CodeActivity Sender = (CodeActivity) sender; Microsoft.Office.Workflow.Actions.OfficeTask currentApprover = ((CompositeActivity) Sender.Parent).Parent as Microsoft.Office.Workflow.Actions.OfficeTask; currentApprover.AssignedTo = FormatApprovers(TeamLeads); TaskTitle = "Review project " + projectName[0]; } private static string FormatApprovers(string[] list) { if (list == null)</pre>

```

        return String.Empty;
        StringBuilder strbuilder = new
StringBuilder(
        @"<my:Assignments
xmlns:my='http://schemas.microsoft.com/office/inf
opath/2003/myXSD'
xmlns:pc='http://schemas.microsoft.com/office/inf
opath/2007/PartnerControls'>
        <my:Assignment>");
        foreach (string s in list)
        {
            strbuilder.AppendFormat(
@"
            <my:Assignee>
                <Person>
                    <DisplayName />
<AccountType>User</AccountType>
<AccountId>{0}</AccountId>
                </Person>
            </my:Assignee>", s);
        }
        strbuilder.AppendFormat(
@"
<my:AssignmentType>Parallel</my:AssignmentType>
        </my:Assignment>
        </my:Assignments>");
        return strbuilder.ToString();
    }

    private void VerifyExitCondition(object
sender, ConditionalEventArgs e)
    {
        IfElseBranchActivity Sender =
(IfElseBranchActivity)sender;
        Microsoft.Office.Workflow.Actions.OfficeTask
officeTask = Sender.Parent.Parent.Parent as
Microsoft.Office.Workflow.Actions.OfficeTask;

        if (officeTask == null)
            return;

        if
(officeTask.TaskResults["Approved"] != null)
        {
            e.Result = true;
            approvalResult = true;
        }
        else
        {
            e.Result = true;
            approvalResult = false;
        }
    }

    private void IfIdeaNotApproved(object
sender, ConditionalEventArgs e)
    {
        e.Result = !approvalResult; //If
project is approved approvalResult == true =>
Result must be negated
    }
}
#endregion

```

In the onTaskStartedBuildApprovers activity,

bind the ExecuteCode handler to the method BuildApprovers

onTaskStartedBuildApprovers System.Workflow.Activities.CodeActivity

(Name)	onTaskStartedBuildApprovers
Description	
Enabled	True

Handlers

ExecuteCode	BuildApprovers
-------------	----------------

In the OnTaskAssigning1 Action add the two activities setTaskField to initialize the task field and the task title

SetTaskField: ProjectUid

Set TaskTitleField: TaskTitle

onTaskAssigning1

```

    graph TD
      onTaskAssigning1 --> setTaskProjectUidField
      setTaskProjectUidField --> setTaskTitleField
  
```

setTaskProjectUidField Microsoft.Office.Workflow.Actions.SetTaskField

(Name)	setTaskProjectUidField
Description	
Enabled	True
Misc	
Field Name	ProjectUid
Field Value	Activity=projectSequence1, Path=WorkflowContext.ProjectUid

setTaskTitleField Microsoft.Office.Workflow.Actions.SetTaskField

(Name)	setTaskTitleField
Description	
Enabled	True
Misc	
Field Name	Title
Field Value	Activity=Workflow1, Path=TaskTitle

In the CheckExitConditions activity add an IfElseActivity

Bind the ifelse condition to the method VerifyExitCondition

Add an endTaskProcess1 activity to exit the approval process once the condition is met.

In our case at least one approver has answered

approvalProcess

```

    graph TD
      onTaskProcessStarted1 --> onTaskAssigning1
      onTaskAssigning1 --> checkExitConditions1
      checkExitConditions1 --> ifElseActivity1
      ifElseActivity1 --> endTaskProcess1
      ifElseActivity1 --> DropActivitiesHere
  
```

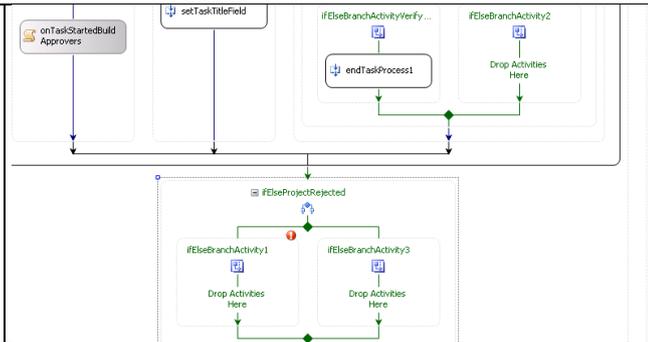
ifElseBranchActivity1 System.Workflow.Activities.IfElseBranchActivity

(Name)	ifElseBranchActivity1
Description	
Enabled	True

Conditions

Condition	Code Condition
Condition	VerifyExitCondition

After the approval process, add an IfElse Activity and named it IfElseProjectRejected.

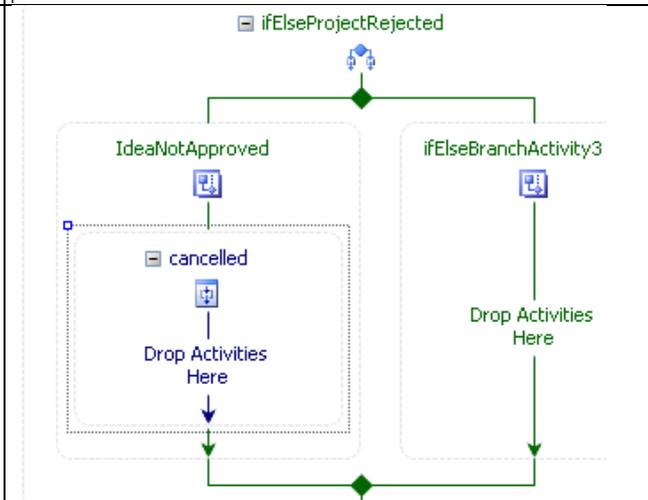


Bind the If condition to the method IfIdeaNotApproved

IdeaNotApproved System.Workflow.Activities.IfElseBranchActivity

Activity	
(Name)	IdeaNotApproved
Description	
Enabled	True
Conditions	
Condition	Code Condition
Condition	IfIdeaNotApproved

Add a Sequence Activity and name it Cancelled.



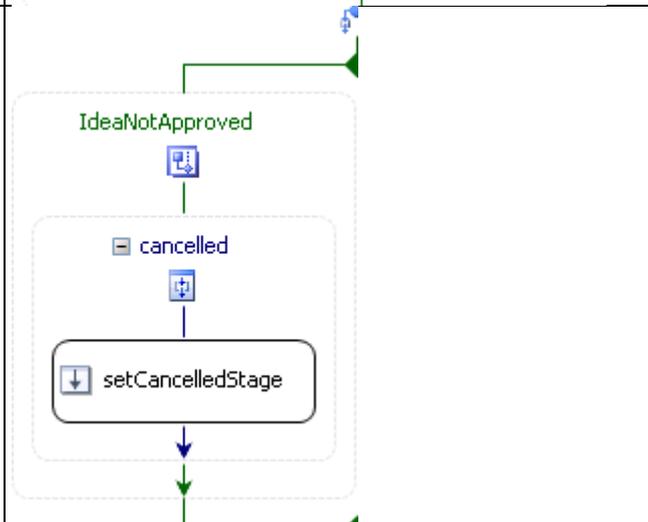
Add a SetProjectStage Activity and name it:

Name: setCancelledStage

stageOrder: 3

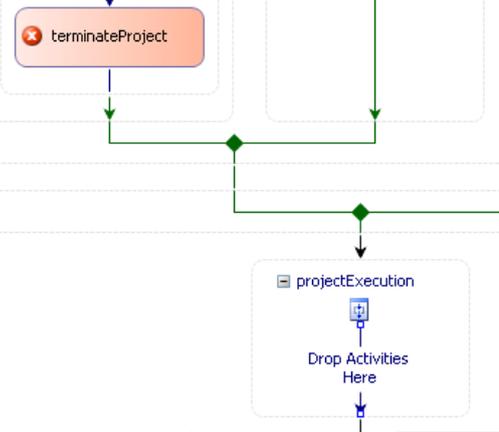
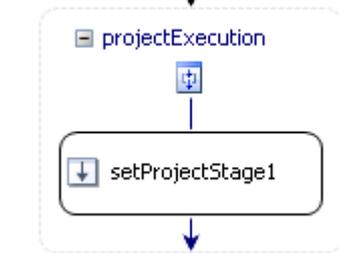
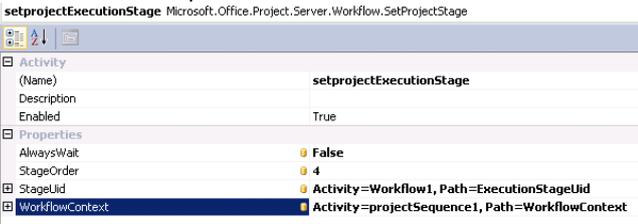
StageUid: CancelledStageUid

WorkflowContext: WorkflowContext



setCancelledStage Microsoft.Office.Project.Server.Workflow.SetProjectStage

Activity	
(Name)	setCancelledStage
Description	
Enabled	True
Properties	
AlwaysWait	False
StageOrder	3
StageUid	Activity=Workflow1, Path=CancelledStageUid
WorkflowContext	Activity=projectSequence1, Path=WorkflowContext

																					
<p>Add a SetProjectStage activity</p> <p>Name: setProjectExecutionStage</p> <p>StageOrder: 4</p> <p>StageUid: ExecutionStageUid</p> <p>WorkflowContext</p>	  <table border="1"> <thead> <tr> <th colspan="2">setProjectExecutionStage Microsoft.Office.Project.Server.Workflow.SetProjectStage</th> </tr> </thead> <tbody> <tr> <td>Activity</td> <td></td> </tr> <tr> <td>(Name)</td> <td>setProjectExecutionStage</td> </tr> <tr> <td>Description</td> <td></td> </tr> <tr> <td>Enabled</td> <td>True</td> </tr> <tr> <td>Properties</td> <td></td> </tr> <tr> <td>AlwaysWait</td> <td>False</td> </tr> <tr> <td>StageOrder</td> <td>4</td> </tr> <tr> <td>StageUid</td> <td>Activity=Workflow1, Path=ExecutionStageUid</td> </tr> <tr> <td>WorkflowContext</td> <td>Activity=projectSequence1, Path=WorkflowContext</td> </tr> </tbody> </table>	setProjectExecutionStage Microsoft.Office.Project.Server.Workflow.SetProjectStage		Activity		(Name)	setProjectExecutionStage	Description		Enabled	True	Properties		AlwaysWait	False	StageOrder	4	StageUid	Activity=Workflow1, Path=ExecutionStageUid	WorkflowContext	Activity=projectSequence1, Path=WorkflowContext
setProjectExecutionStage Microsoft.Office.Project.Server.Workflow.SetProjectStage																					
Activity																					
(Name)	setProjectExecutionStage																				
Description																					
Enabled	True																				
Properties																					
AlwaysWait	False																				
StageOrder	4																				
StageUid	Activity=Workflow1, Path=ExecutionStageUid																				
WorkflowContext	Activity=projectSequence1, Path=WorkflowContext																				
<p>Add the code to handle the Send Email activity</p>	<pre> #region SendEmail public String[] projectManagerValue = default (System.String[]); public Microsoft.Office.Project.Server.Schema.ResourceDa taSet ReturnedResourceData = new Microsoft.Office.Project.Server.Schema.ResourceDa taSet (); private void SendingEmail(object sender, EventArgs e) { SendEmail email = (SendEmail)sender; if ((projectName != null) && (projectName.Length != 0) && (projectName[0] != string.Empty)) { //fill in email subject if project name is not empty email.Subject = String.Format("Project {0} has been selected ", projectName[0]); email.Body = String.Format("You're listed as PM Owner for the following project: - <I> {0} </I>.
 Please create the detailed project plan.
 {1}

 Thanks,
 Workflow Group", projectName[0], GetProjectUrl()); } else { email.Subject = string.Empty; email.Body = string.Empty; } if ((ReturnedResourceData != null) && (ReturnedResourceData.Resources.Count == 1)) </pre>																				

```

        {
            //send it to
            email.To =
ReturnedResourceData.Resources[0].WRES_EMAIL;
        }
        else
        {
            email.To = "workflow@ms.com";
        }
    }

    private string GetProjectUrl()
    {
        return workflowProperties.WebUrl +
"/projectdrilldown.aspx?projUid=" +
projectSequence1.WorkflowContext.ProjectUid;
    }
}

#endregion

```

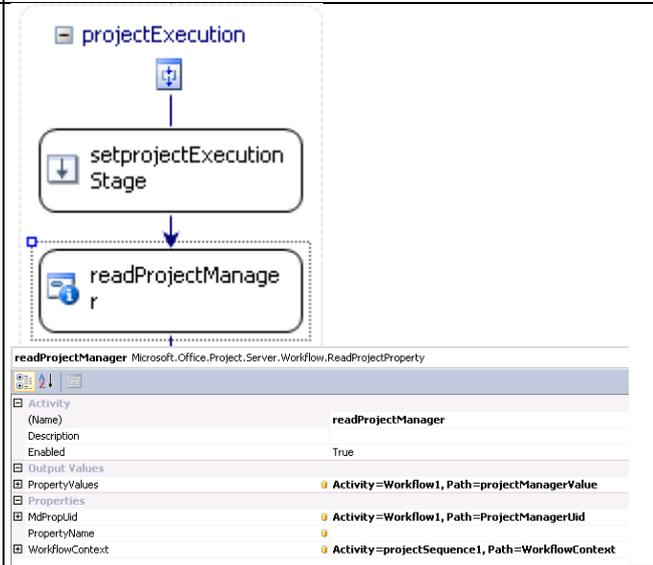
Add ReadProjectProperties to get the PM name

Name: toReadProjectManager

PropertyValues: projectManagerValue

MdPropUid: ProjectManagerUid

WorkflowContext: WorkflowContext

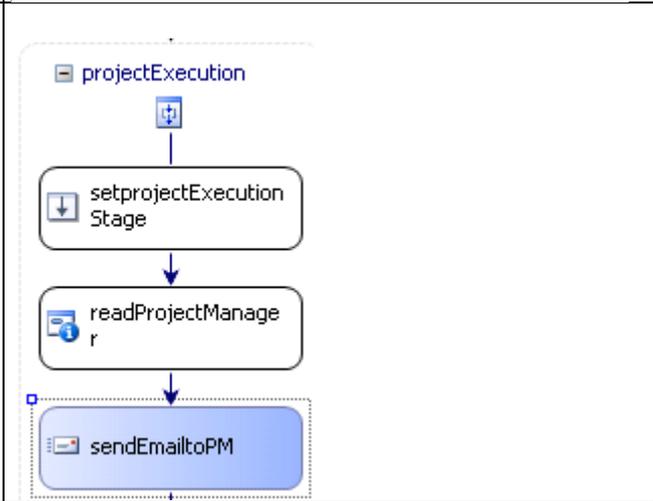


Add a SendEmail activity from the SharePoint Workflow toolbox

Name: sendEmailtoPM

CorrelationToken: workflowToken

MethodInvoking: SendingEmail



<p>Add an updateProjectStageStatus activity</p> <p>Name: updateProjStageStatusWaitForSubmit</p> <p>StageUid: ExecutionStageUid</p> <p>StatusInformation Please hit submit once project is complete</p> <p>UpdateProjectStatusField: Waiting for Input</p> <p>WorkflowContext: WorkflowContext</p>	
<p>Add an OnProjectSubmit activity</p> <p>Name: onProjectSubmit1</p> <p>WorkflowContext: WorkflowContext</p>	

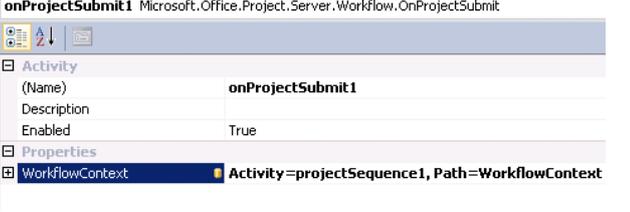
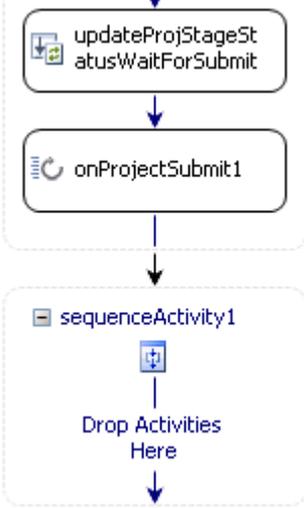
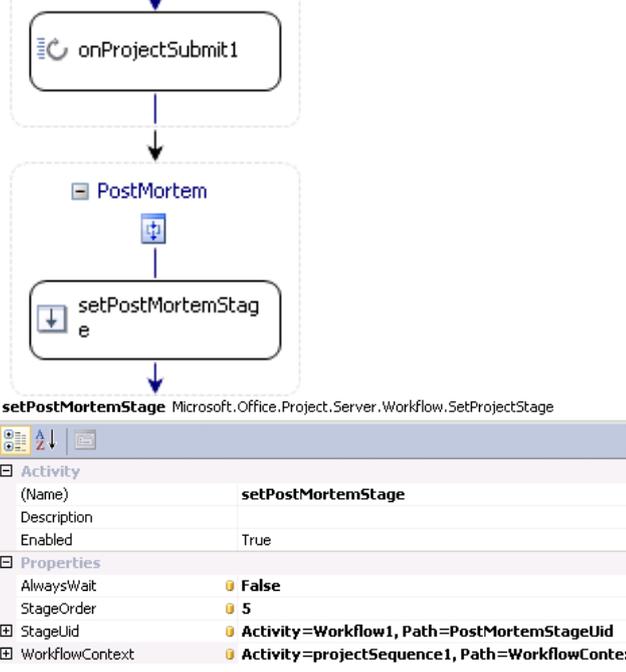
	
<p>Add a SequenceActivity</p> <p>PostMortemStage</p>	
<p>Add setProjectStage</p> <p>Name: setPostMortemStage</p> <p>StageOrder: 5</p> <p>StageUid : PostMortemStageUid</p> <p>WorkflowContext ProjectSequence1.WorkflowContext</p>	
<p>At this stage, build your solution.</p> <p>You should have no errors.</p> <p>Before deploying it we have to update the code with the correct GUID</p>	

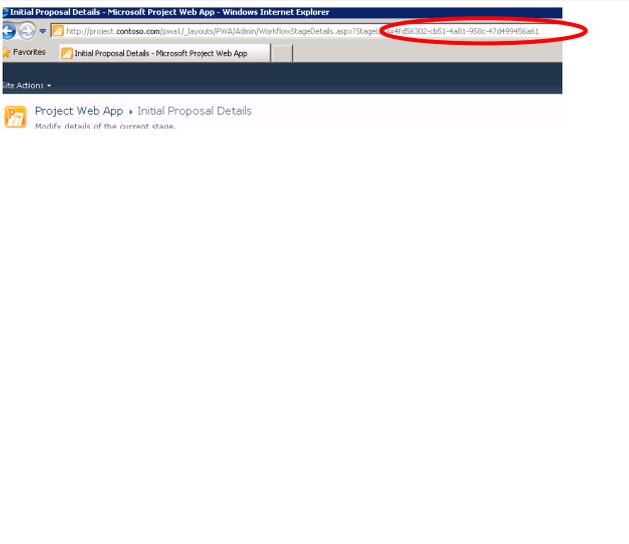
Figure 37: Steps to create the workflow in Visual Studio

5.6.5 Get the GUID from Project Configuration

You need to use the GUID of the object defined in the Project Server configuration, when setting some properties on the Workflow activities in Visual Studio.

We have defined variables that will hold these values.

We need now to get the real Guides

Actions	Screen
<p>Getting the stage GUID</p> <p>Directly by copy pasting the Guid from the Project Server setting page.</p> <p>Go to Server Settings\Workflow Stages\ Open the Stage</p> <p>2 possibilities:</p> <p>In the URL</p>	
<p>Or by using the System Identification Data section (at the end of the Stage page)</p>	
<p>In our example we need the GUID for the 5 stages:</p> <p>Idea Collection</p> <p>Lead Approval</p> <p>Cancelled</p> <p>Execution</p> <p>Post Mortem</p> <p>We can update our code with the</p>	<pre>#region Variables //workflow stages used in this workflow new Guid("00000000-0000-0000-0000- 000000000000"); public Guid IdeaCollectionStageUid = new Guid("0bea837d-e632-45d2-b253- 5b3b9f383c86"); public Guid LeadApprovalStageUid = new Guid("04b334fa-3e9a-49fd-aaad- c710fd8d8198"); public Guid CancelledStageUid = new Guid("4631c35a-2316-4940-bfd1-eeae9a60b2d8"); public Guid ExecutionStageUid = new Guid("c363dcc4-94bb-46e7-8477-52042dcd28ee"); public Guid PostMortemStageUid = new Guid("7d4e4a4f-518a-493d-9d20-1d4360f4fcb1");</pre>

correct values.	
<p>And for the Custom fields and Lookup tables</p> <p>FundingRequired</p> <p>FundingRequired Yes value</p> <p>ProjectManager</p> <p>We can update our code with the correct values.</p> <p><i>Note:</i> you will need to replace the values with your specific GUID values.</p>	<pre> //Funding Required public Guid FundingRequiredUid = new Guid("64d3274c-d242-4e25-9341-828db99b14a9"); public Guid FundingRequiredYesLTValueUid = new Guid("2324b22f-d523-4a87-8263-81e0ce500105"); public bool RequiresFundingResult; //Project Manager public Guid ProjectManagerUid = new Guid("c3d6ec22-0862-43a6-b3a0-91d5c1eb03fb"); </pre>

Figure 38: Finding the GUIDs for the Project Server objects

At this point we can now test and run our workflow from Project Server after deploying it.

5.7 Deploy the workflow

The following steps are needed to be able to use the workflow in Project Server.

1. Deploy the workflow by using Visual Studio or the WSP package.
2. Restart three separate services.
3. Create a workflow association to the DLL.
4. Associate the workflow to an Enterprise Project Type (EPT).

Here is the script to restart the three services:

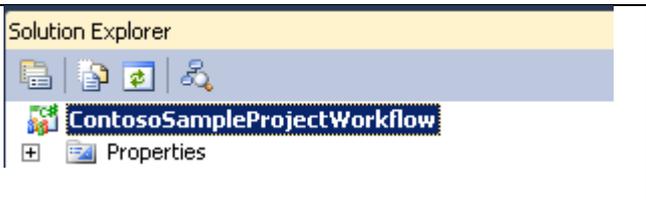
```

Net stop SPTimerV4
Net stop ProjectQueueService14
Iisreset.exe /stop
Iisreset.exe /start
Net start ProjectQueueService14
Net start SPTimerV4
Pause

```

Figure 39: Script to restart the 3 services after the deployment

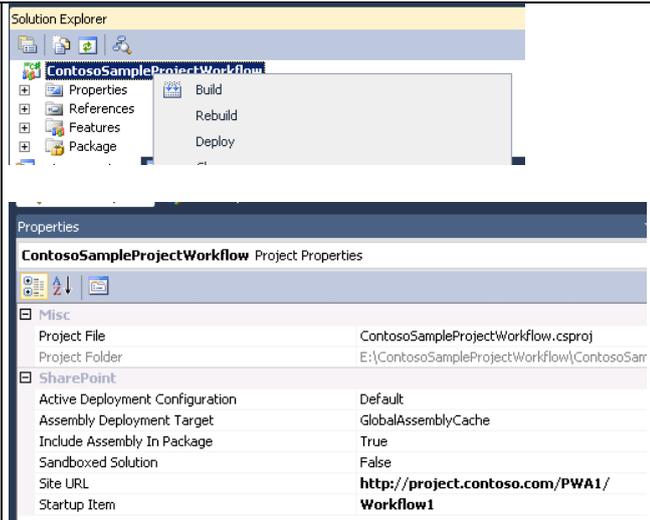
5.7.1 Using Visual Studio automatic deployment

Actions	Screen
<p>To deploy the workflow using Visual Studio.</p> <p>Select the solution ContosoSampleProjectWorkflow and</p>	 <p>The screenshot shows the Visual Studio Solution Explorer with the project 'ContosoSampleProjectWorkflow' selected. The toolbar includes icons for Solution Explorer, Properties, Add New Item, and Add New Project. The 'Properties' window is open at the bottom.</p>

right-click:

Select Deploy.

This will recompile your solution, package it, and deploy it in the site



Then you need to restart the three following processes:

SharePoint Timer

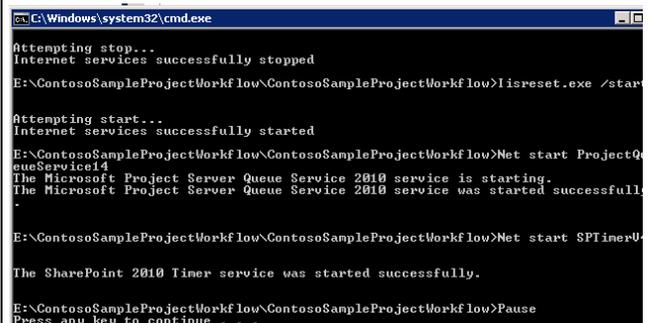
ProjectQueueService

IIS

This can be automated in a simple batch file like the one presented here.

If you do not recycle these processes, the latest version will not be used until these processes are restarted.

```
Net stop SPTimerV4
Net stop ProjectQueueService14
Iisreset.exe /stop
Iisreset.exe /start
Net start ProjectQueueService14
Net start SPTimerV4
Pause
```

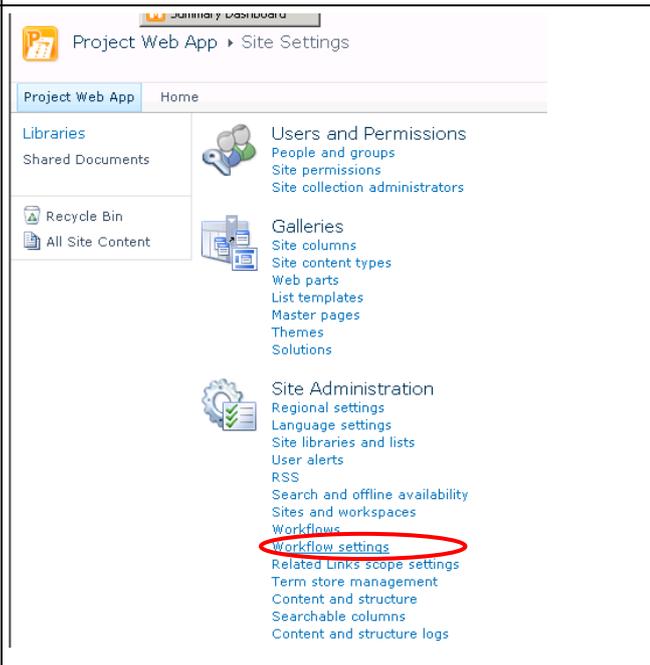


You then need to check the workflow association on your SharePoint site:

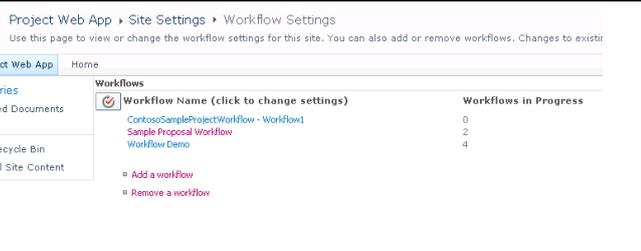
Go to Site Settings in Project Web App

In the Site Administration section, select:

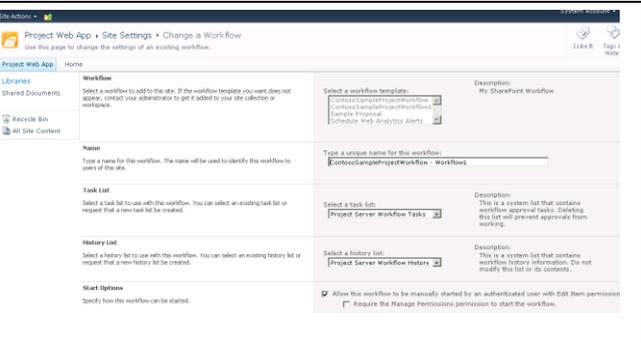
Workflow settings



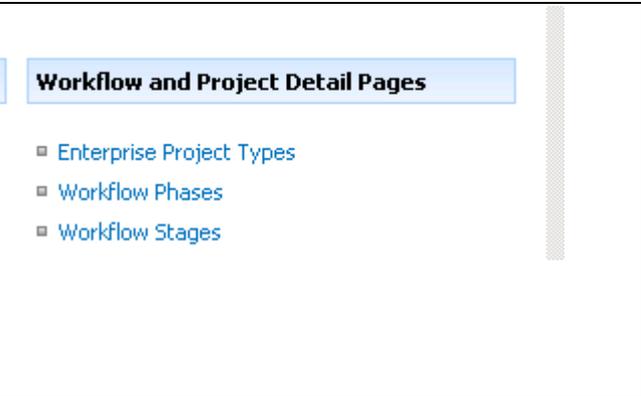
You should see your newly deployed Workflow.



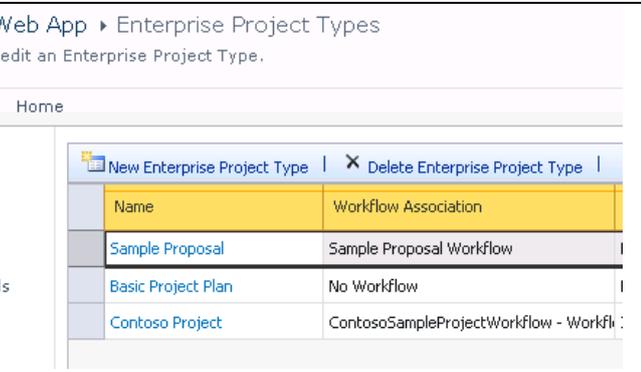
If you click on the workflow “ContosoSampleProjectWorkflow”, you will see the settings of this workflow.



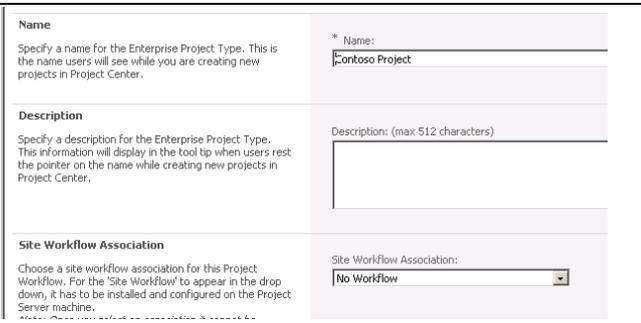
You can now make the association with your EPT.
Go to Project Server settings in PWA in the Workflow and Project Detail Pages, Select Enterprise Project Types (EPT)



Select the EPT Contoso Project



You need to associate or re-associate the newly deployed Workflow with the EPT.
Select ContosoSampleProjectWorkflow – Workflow1

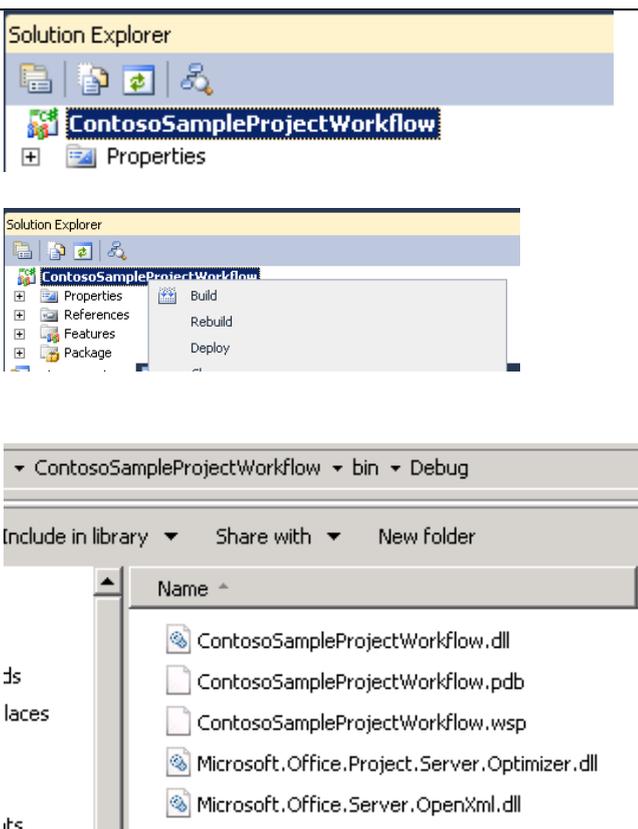


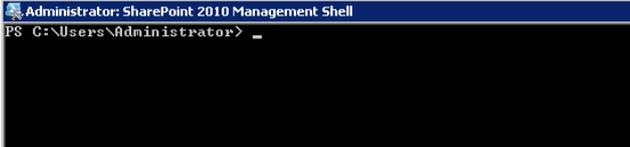
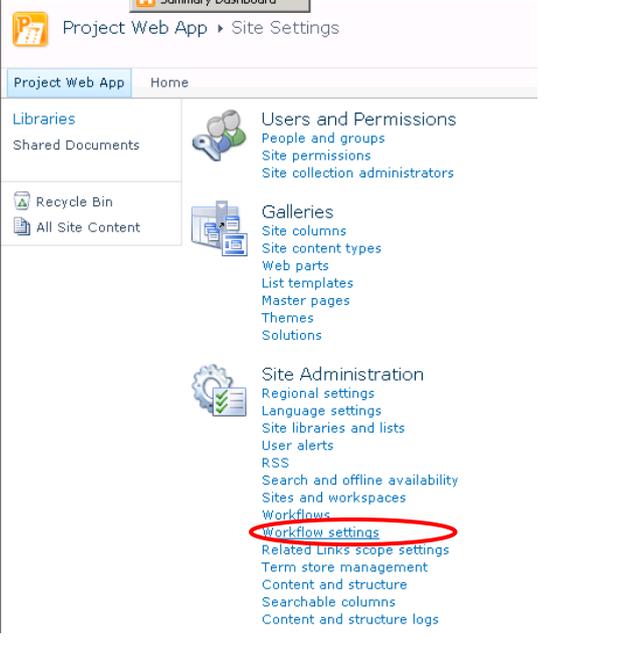
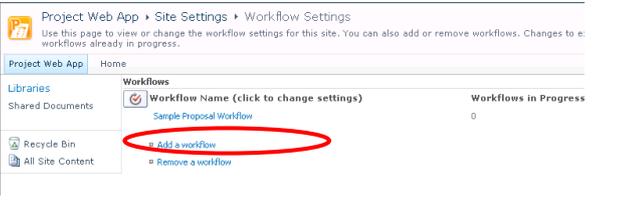
	<p>Site Workflow Association:</p> 
<p>You are now ready to use your Workflow.</p>	

Figure 40: Steps to deploy your workflow using Visual Studio

5.7.2 Using a WSP package

You have to use a WSP package if you have to deploy the solution on server where you do not have Visual Studio installed.

Actions	Screen
<p>In order to build the WSP package of the solution, just select the Build menu</p> <p>Select the solution ContosoSampleProjectWorkflow and right-click:</p> <p>Select Build.</p> <p>This will compile your solution, package it, and generate a WSP package in the bin directory of your solution.</p>	
<p>Take the WSP file ContosoSampleProjectWorkflow.wsp and copy it on your target server to the directory C:\DeployPSS</p>	

<p>Start an administrator Windows PowerShell command window.</p>							
<p>Use the following Windows PowerShell commands to add the solution to the Farm.</p>	<p>Add-SPSolution -LiteralPath C:\DeployPSS\ContosoSampleProjectWorkflow.wsp</p> <pre>PS C:\Users\Administrator> Add-SPSolution -LiteralPath C:\DeployPSS\ContosoSampleProjectWorkflow.wsp</pre> <table border="1"> <thead> <tr> <th>Name</th> <th>SolutionId</th> <th>Deployed</th> </tr> </thead> <tbody> <tr> <td>contososampleprojectworkflo...</td> <td>94f0c680-86d7-449d-bb19-5c8cch39e7b9</td> <td>False</td> </tr> </tbody> </table> <pre>PS C:\Users\Administrator></pre>	Name	SolutionId	Deployed	contososampleprojectworkflo...	94f0c680-86d7-449d-bb19-5c8cch39e7b9	False
Name	SolutionId	Deployed					
contososampleprojectworkflo...	94f0c680-86d7-449d-bb19-5c8cch39e7b9	False					
<p>Install the solution</p>	<p>Install-SPSolution -Identity ContosoSampleProjectWorkflow.wsp - GacDeployment</p> <pre>PS C:\Users\Administrator> Install-SPSolution -Identity ContosoSampleProjectWorkflow.wsp -GacDeployment</pre> <pre>PS C:\Users\Administrator></pre>						
<p>Enable the feature in the Project Web App site collection.</p>	<p>Enable-SPFeature -Identity ContosoSampleProjectWorkflow_Feature1 -Url http://project.contoso.com/pwa1</p> <pre>PS C:\Users\Administrator> Enable-SPFeature -Identity ContosoSampleProjectWorkflow_Feature1 -Url http://project.contoso.com/PWA1</pre> <pre>PS C:\Users\Administrator></pre>						
<p>You can verify that the feature is activated at the Site collection level.</p>							
<p>Then, to enable the creation of workflow instance, go to Site Settings in Project Web App.</p> <p>In the Site Administration section, select:</p> <p>Workflow settings</p>							
<p>Select Add a workflow</p> <p>Or the workflow if this is a Refresh</p>							

Select the Workflow that you have just deployed.

Give it the name that will be visible to the user of the site.

The screenshot displays the 'Add a Workflow' configuration page in the Project Web App. The page is titled 'Project Web App > Site Settings > Add a Workflow'. It features a sidebar with navigation options like 'Libraries', 'Shared Documents', 'Recycle Bin', and 'All Site Content'. The main content area is divided into several sections: 'Workflow' (instructions on adding a workflow), 'Name' (a text input field containing 'Contoso Sample Project Workflow'), 'Task List' (a dropdown menu set to 'Project Server Workflow Tasks'), 'History List' (a dropdown menu set to 'Project Server Workflow History'), and 'Start Options' (checkboxes for manual start and permissions). Below these sections is a 'Workflows' table with columns for 'Workflow Name' and 'Workflows in Progress'. The table lists 'Contoso Sample Project Workflow' with 0 workflows in progress. At the bottom, the 'Site Workflow Association' section includes a dropdown menu with 'Contoso Sample Project Workflow' selected.

Go to the EPT and make the association (see previous chapter).

Figure 41: Steps to deploy your workflow using a WSP package

5.8 Developing your own custom activity

In our example we need a specific Activity to update the permissions of the project so that the selected Project Manager can act as a Project Manager in Project Server 2010.

The source code for this Activity is part of the samples of the Project Server 2010 SDK, which can be downloaded here:

<http://www.microsoft.com/downloads/details.aspx?FamilyID=46007f25-b44e-4aa6-80ff-9c0e75835ad9&displaylang=en>

To develop you own custom activity, you need to follow the following steps:

1. Create a class library - Workflow - Workflow Activity Library that uses Framework 3.5
To use this custom activity in your own custom workflow:
2. Set a reference to the ActivityLibrary.dll assembly.
3. Add the custom activity to the toolbox.
4. Add the custom activity to you Visual Studio designer view and fill in the properties.

5. Build and create the deployment package.

Extra steps to deploy the workflow with your custom activity:

1. Deploy in the GAC your ActivityLibrary.dll assembly:
2. Update the Web.config file of the Project server Web application in the WorkflowServices element to include a reference to the assembly.

To have all the detail steps see the document included in the sample of the Project Server SDK:
Creating and Using a Custom Project Server Workflow Activity.

Action

Screen

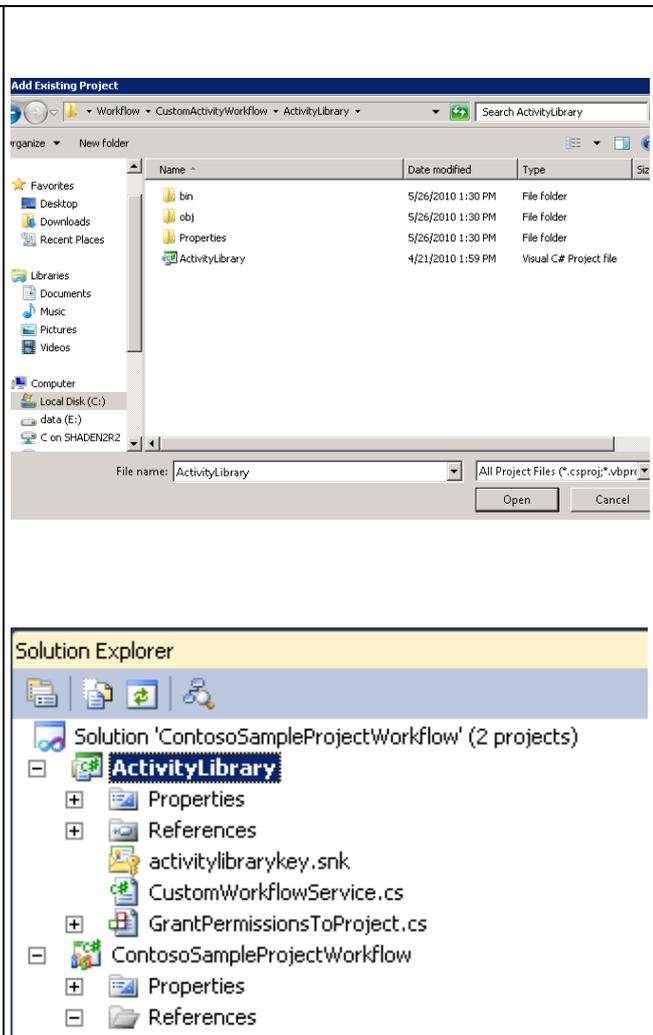
We will add the custom Activity Project to our current Visual Studio solution.

Select the menu Add Existing Project

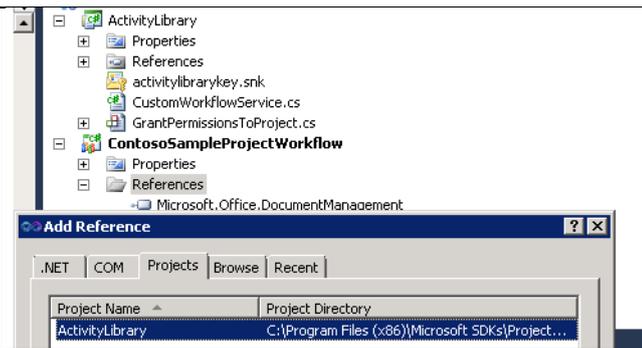
Go to the directory:

C:\Program Files (x86)\Microsoft SDKs\Project2010SDK\Samples\Workflow\CustomActivityWorkflow\ActivityLibrary and add the ActivityLibrary project

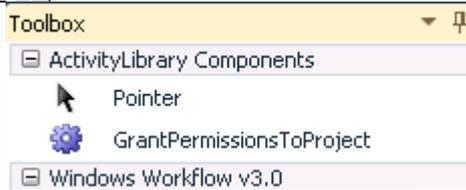
Build the project.



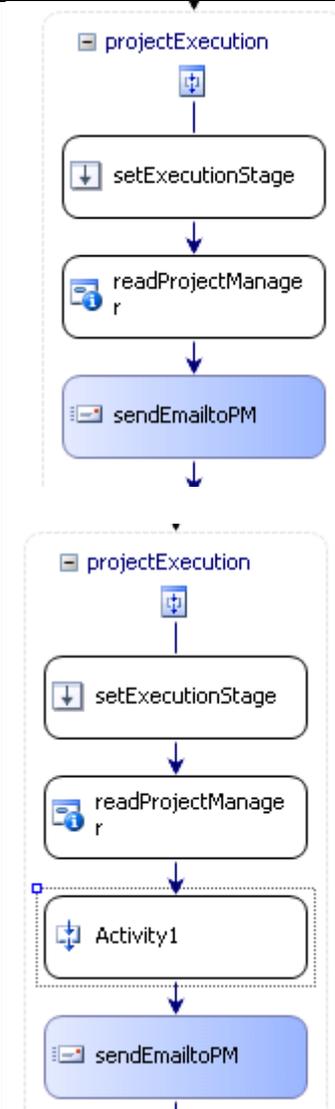
Add a reference to this Activity library assembly to the ContosoSampleProjectWorkflow project references.



The new activity is now available in the Toolbox:



In our example, add this activity before the SendEmailToPM activity.



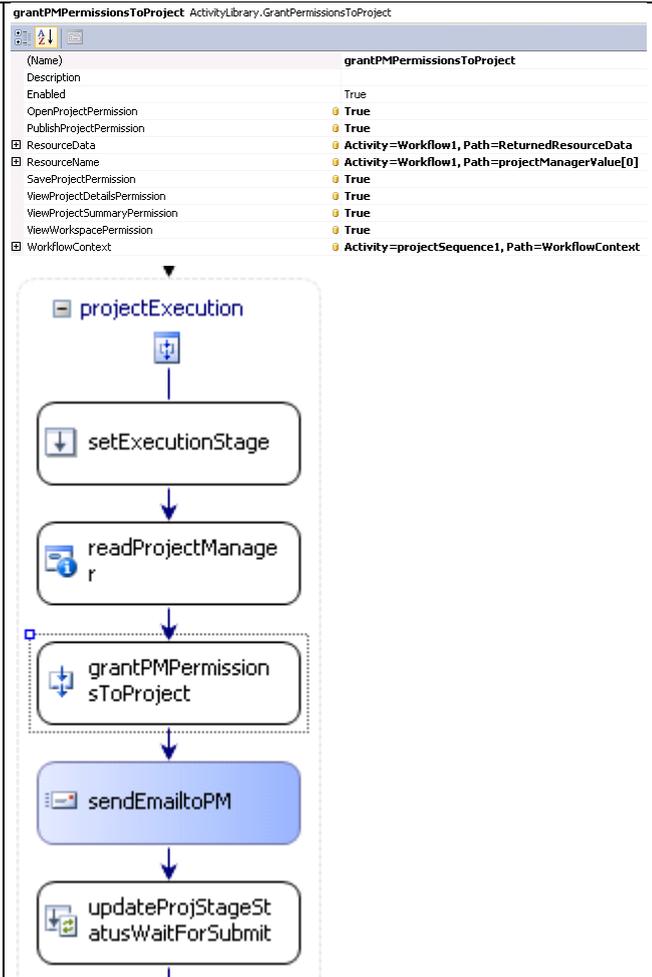
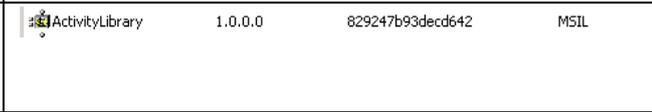
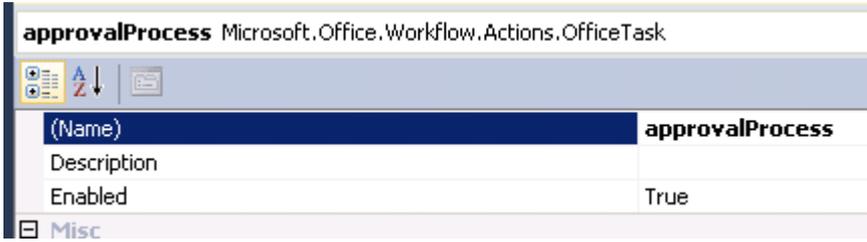
<p>Set up the properties:</p> <p>Name: grantPMPermissionsToProject</p> <p>ResourceData: ReturnedResourceData</p> <p>ResourceName: projectManagerValue[0]</p> <p>SaveProjectPermission: True</p> <p>ViewProjectDetailsPermission: True</p> <p>ViewProjectSummaryPermission: True</p> <p>ViewWorkspacePERmssion: True</p> <p>WorkflowContext: WorkflowContext</p>	
<p>Deploy the new solution by using Visual Studio.</p>	
<p>Add the Activity Library .dll assembly in the GAC</p>	
<p>Update the Web.config file of the Web application that contains the Project Server application to include the custom activity.</p> <p>This line needs to be added in the <WorkflowServices> section.</p> <p>If you forget to update the Web.config file or if the Activiy Library is not deployed in the GAC, the workflow will fail to start.</p>	<pre data-bbox="703 1391 1355 1523"><WorkflowService Assembly="ActivityLibrary, Version=1.0.0.0, Culture=neutral, PublicKeyToken=829247b93decd642" Class="ActivityLibrary.CustomWorkflowService" /></pre> 

Figure 42: Steps to add a custom Activity to our workflow project

5.9 Development Best practices and Guide

Here are some general best practices that you can follow to ease the maintenance of your custom Workflow.

5.9.1 Best practices

Context	Remarks
Define all your strings in local variables so that you can reference these variables when using the Workflow Designer in Visual Studio.	Using variable to hold constants brings a single point of maintenance to ease the maintenance. It is also better for preparing the code for localization. It makes the code more robust.
Add error handling code to handle specific case or unexpected events	You need to add error handling code to your workflow. There are specific handlers that can be used: Fault and cancel handlers. These are described in the SDK in this article for example http://msdn.microsoft.com/en-us/library/dd695716.aspx
Use the Enable Property in an Activity, to temporarily disable an activity that is creating a problem.	Each workflow activity has an Enabled property. An activity can be easily disabled by setting this property to False. 
How to redeploy a new version of a workflow, and manage the currently running	Use the Skip to stage feature http://blogs.msdn.com/project_programmability/archive/2010/02/10/how-to-use-the-skip-to-stage-feature-in-project-server-2010-workflows.aspx

workflow:

Caution when copying or pasting a GUID from the PWA interface

When you do a copy/paste of GUID from the PWA interface, a control characters is added that may interfere with the real value.

Figure 43: List of Best Practices

5.9.2 Description of Activities in a Nutshell

Description and list of activities you can use (the most used):

Activity Name Project Server Specific (Microsoft.Office.Project.Server.Workflow)	Purpose
CompareProjectProperty	An activity that will compare the value of a project Custom or intrinsic Field and return True/False
OnProjectCheckin	An activity that will pause the workflow until a Project Checkin Event happens for the current project
OnProjectCommit	An activity that will pause the workflow until a Project Commit Event happens for the current project. This event happen when a project is selected within the Portfolio Analysis feature.
OnProjectSubmit	An activity that will pause the workflow until a Project Submit Event happens for the current project
ProjectSequence	A wrapper activity that must be the second activity in the workflow (right after onWorkflowActivated). All following activities must be placed within this activity and will need to inherit the workflow context.
ReadProjectProperty	An activity that will return the value of a Project Custom or intrinsic field
ReadProjectSecurityGroupMembers	An activity that will return all of the members of a particular security group within Project Server, with or without filtering based on

	department.
SetProjectStage	This activity defines when a stage starts. Stages that are created within Project Server are referenced directly by using this activity.
UpdateProjectProperty	An activity used to update an intrinsic or custom field
UpdateProjectStageStatus	Updates the status message for a stage. You should add the UpdateProjectState activity only if you want to communicate to the end user what's going on with the project (for example - Waiting for Approval, Waiting for Portfolio)

Figure 44: Description of Project Server workflow activities

Full details can be found here: <http://msdn.microsoft.com/en-us/library/ee756398.aspx>

Activity Name SharePoint Specific (Microsoft.SharePoint.WorkflowActions)	Purpose
OnWorkflowActivated	Responds to the event that Microsoft SharePoint Foundation raises when a new workflow instance is initiated for an item
SendEmail	Creates and sends an e-mail message to the specified users

Figure 45: Description of SharePoint workflow activities

Full details can be found here: <http://msdn.microsoft.com/en-us/library/ms473641.aspx>

Activity Name SharePoint Server Specific (Microsoft.Office.Workflow.Actions)	Purpose
Office Task	This activity is for the generalized extensible execution of assigning work to users and responding to the completion of work in a repeatable contained way
ForwardTask	Creates a copy of the current task and assigns it to a specified user. Both copies of the task must be completed for the original task to be considered complete.
EscalateTask	Effectively reassigns a workflow task to the task owner's manager.
OnTaskAssigning	An activity that is executed before a task is created and sent to a specified user.
OnTaskProcessStarted	Executes when a task is first created, but before the task is assigned to users.
SetTaskField	A workflow activity used to assign values to a specified field for a task item such as AssignedTo, Title or DueDate.
EndTaskProcess	Forcefully ends the task process, regardless of the completion status of existing tasks. In other words, it ends tasks that may be incomplete.
CheckExitConditions	A sequential workflow activity that contains conditional logic. This activity must be a direct child of an OfficeTask activity.

Figure 46: Description of SharePoint Server (Office Task) workflow activities

Full details can be found here: <http://msdn.microsoft.com/en-us/library/ee590729.aspx>

Activity Name Workflow General (System.Workflow.Activities)	Purpose
Code	Runs the code-beside method associated with

	an activity
IfElse Activity	Conditionally runs one of two or more activities of type IfElseBranchActivity
IfElseBranchActivity	Represents a branch of an IfElseActivity
SequenceActivity	Runs a set of child activities according to a single defined ordering
TerminateActivity	Terminates execution of workflow

Figure 47: Description of Windows workflow activities

Full details can be found here: <http://msdn.microsoft.com/en-us/library/ms594882.aspx>

5.9.3 Source code of the sample

Here is the full code of the sample code:

```

using System;
using System.ComponentModel;
using System.ComponentModel.Design;
using System.Collections;
using System.Drawing;
using System.Linq;
using System.Workflow.ComponentModel.Compiler;
using System.Workflow.ComponentModel.Serialization;
using System.Workflow.ComponentModel;
using System.Workflow.ComponentModel.Design;
using System.Workflow.Runtime;
using System.Workflow.Activities;
using System.Workflow.Activities.Rules;
using Microsoft.SharePoint;
using Microsoft.SharePoint.Workflow;
using Microsoft.SharePoint.WorkflowActions;
using Microsoft.Office.Project.Server.Library;
using System.Text;
using System.Diagnostics; // for launching the debugger Debugger.Break

namespace ContosoSampleProjectWorkflow.Workflow1
{
    public sealed partial class Workflow1 : SequentialWorkflowActivity
    {
        public Workflow1()
        {
            wfContext = new Microsoft.SharePoint.WorkflowActions.WorkflowContext();
            InitializeComponent();
        }

        public Guid workflowId = default(System.Guid);
        public SPWorkflowActivationProperties workflowProperties
        {
            get;
            set;
        }

        // to manage the workflow Office Tasks
        public Microsoft.SharePoint.WorkflowActions.WorkflowContext wfContext
        {
            get;
            set;
        }

        protected override void Dispose(bool disposing)
        {
            base.Dispose(disposing);
            if (disposing)
            {
                wfContext.Dispose();
                workflowProperties.Dispose();
            }
        }

        private void onWorkflowActivated1_Invoked(object sender, ExternalDataEventArgs e)
        {
            wfContext.Initialize(workflowProperties);
        }
    }
}

```

```

#region Variables
//workflow stages used in this workflow new Guid("00000000-0000-0000-0000-
000000000000");
public Guid IdeaCollectionStageUid = new Guid("0bea837d-e632-45d2-b253-5b3b9f383c86");
public Guid LeadApprovalStageUid = new Guid("04b334fa-3e9a-49fd-aaad-c710fd8d8198");
public Guid CancelledStageUid = new Guid("4631c35a-2316-4940-bfd1-eeae9a60b2d8");
public Guid ExecutionStageUid = new Guid("c363dcc4-94bb-46e7-8477-52042dcd28ee");
public Guid PostMortemStageUid = new Guid("7d4e4a4f-518a-493d-9d20-1d4360f4fcb1");

//Funding Required
public Guid FundingRequiredUid = new Guid("64d3274c-d242-4e25-9341-828db99b14a9");
public Guid FundingRequiredYesLTValueUid = new Guid("2324b22f-d523-4a87-8263-
81e0ce500105");
public bool RequiresFundingResult;

//Project Manager
public Guid ProjectManagerUid = new Guid("c3d6ec22-0862-43a6-b3a0-91d5c1eb03fb");

//office task variables
/// This is the string that is bound with the SharePoint OfficeTask activity.
public String officeTaskOutcomes = "Approved, ;Rejected,";
public bool approvalResult = false;
public Object TaskTitle = new System.Object();
// this is the Approval ContentTypeID of the Project Server Approval form
public String ProjectServerApprovalContentTypeID =
"0x0108010038A52C27344148C9B9214F82C7C02985";

//user group used for approval - PSSecurityGroup.Team Leads
public Guid TeamLeadGroup = new System.Guid(PSSecurityGroup.TeamLeads.ToString());

public string[] TeamLeads;

//for send email activity
public String[] projectName = default(System.String[]);
public String[] projectOwnerEmail = default(System.String[]);
public String[] ProjectOwnerDisplayName = default(System.String[]);
#endregion

#region TestFunding Required
private void IsFundingRequired(object sender, ConditionalEventArgs e)
{
    e.Result = RequiresFundingResult;
}
#endregion

#region Approval process
private void BuildApprovers(object sender, EventArgs e)
{
    CodeActivity Sender = (CodeActivity)sender;
    Microsoft.Office.Workflow.Actions.OfficeTask currentApprover =
        ((CompositeActivity)Sender.Parent).Parent as
Microsoft.Office.Workflow.Actions.OfficeTask;
    currentApprover.AssignedTo = FormatApprovers(TeamLeads);

    TaskTitle = "Review project " + projectName[0];
}
}

```

```

private static string FormatApprovers(string[] list)
{
    if (list == null)
        return String.Empty;
    StringBuilder strbuilder = new StringBuilder(
        @"<my:Assignments
xmlns:my='http://schemas.microsoft.com/office/infopath/2003/myXSD'
xmlns:pc='http://schemas.microsoft.com/office/infopath/2007/PartnerControls'>
        <my:Assignment>");

    foreach (string s in list)
    {
        strbuilder.AppendFormat(
@"
        <my:Assignee>
            <Person>
                <DisplayName />
                <AccountType>User</AccountType>
                <AccountId>{0}</AccountId>
            </Person>
        </my:Assignee>", s);
    }
    strbuilder.AppendFormat(
@"
    <my:AssignmentType>Parallel</my:AssignmentType>
    </my:Assignment>
</my:Assignments>");

    return strbuilder.ToString();
}

private void VerifyExitCondition(object sender, ConditionalEventArgs e)
{
    IfElseBranchActivity Sender = (IfElseBranchActivity)sender;
    Microsoft.Office.Workflow.Actions.OfficeTask officeTask =
Sender.Parent.Parent.Parent as Microsoft.Office.Workflow.Actions.OfficeTask;

    if (officeTask == null)
        return;

    if (officeTask.TaskResults["Approved"] != null)
    {
        e.Result = true;
        approvalResult = true;
    }
    else
    {
        e.Result = true;
        approvalResult = false;
    }
}

private void IfIdeaNotApproved(object sender, ConditionalEventArgs e)
{
    e.Result = !approvalResult; //If project is approved approvalResult == true =>
Result must be negated
}
#endregion

#region SendEmail
public String[] projectManagerValue = default(System.String[]);

```

```

public Microsoft.Office.Project.Server.Schema.ResourceDataSet ReturnedResourceData =
new Microsoft.Office.Project.Server.Schema.ResourceDataSet();

private void SendingEmail(object sender, EventArgs e)
{
    SendEmail email = (SendEmail)sender;
    if ((projectName != null) && (projectName.Length != 0) && (projectName[0] !=
string.Empty))
    {
        //fill in email subject if project name is not empty
        email.Subject = String.Format("Project {0} has been selected ",
projectName[0]);
        email.Body = String.Format("You're listed as PM Owner for the following
project: - <I> {0} </I>.<BR> Please create the detailed project plan. <BR> {1} <BR><BR>
Thanks, <BR> Workflow Group", projectName[0], GetProjectUrl());
    }
    else
    {
        email.Subject = string.Empty;
        email.Body = string.Empty;
    }

    if ((ReturnedResourceData != null) && (ReturnedResourceData.Resources.Count == 1))
    {
        //send it to
        email.To = ReturnedResourceData.Resources[0].WRES_EMAIL;
    }
    else
    {
        email.To = "workflow@ms.com";
    }
}

private string GetProjectUrl()
{
    return workflowProperties.WebUrl + "/projectdrilldown.aspx?projUid=" +
projectSequence1.WorkflowContext.ProjectUid;
}

#endregion

}
}

```

Figure 48: Source Code of the workflow

6 DEPLOY: DEPLOYMENT FROM DEV TO QA/PRODUCTION

6.1 Deployment of the solution on a QA and Production environment

Once you have developed your workflow on your development environment, you will want to deploy it on a QA environment and then a Production environment.

We have already covered how you can deploy a workflow using the WSP package (see [5.7.2 Using a WSP package](#)), but as you have understood now, we also need to create the associated objects in the Project Server application (Phases, Stages, PDPs, Custom Fields, Lookup tables).

Currently there are two automated solutions available:

1. Playbooks 2010 tool from the Resource kit
2. The Solution starter: EPT Export/Import DMExport/DMLImport from Code Gallery

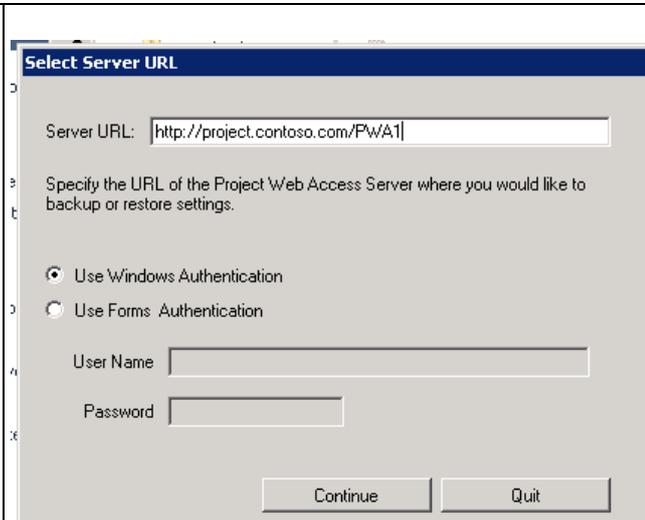
A manual way would be:

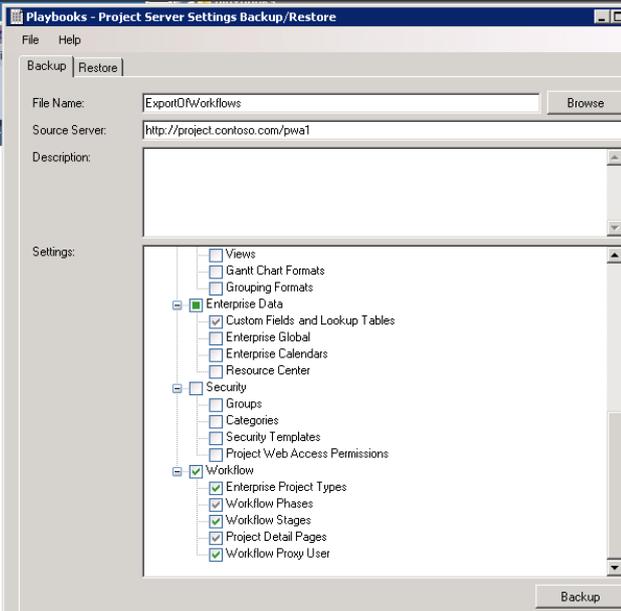
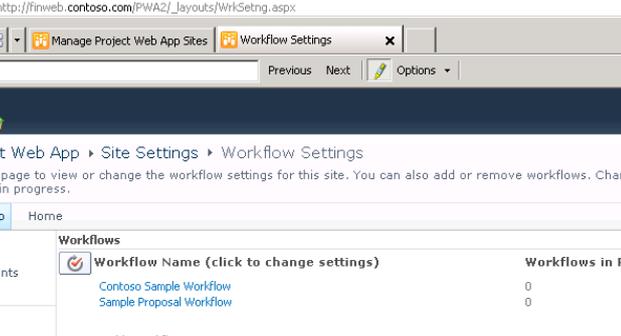
- To manually create the Project Server objects on each environment
- To maintain the different values of the GUID of the objects of the different environments in the variables. The right version of the values would be chosen using conditional compilation that would be triggered by the environment target.

6.1.1 Using the new 2010 Playbooks

A tool called Playbook is available. It has been updated for the 2010 version by adding the export/import of the workflow objects.

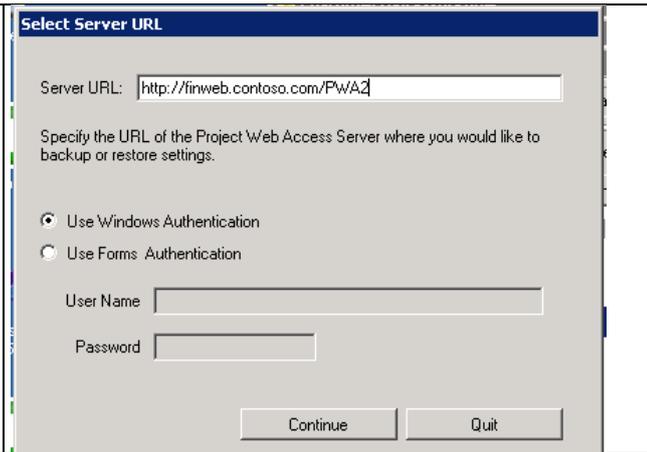
This tool only handles the PWA objects. The workflow needs to be deployed also on the target system.

Actions	Screen
Export the objects Start Playbooks Connect to the development Project Web App site: <code>http://project.contoso.com/PWA1</code>	

<p>Select the Backup tab</p> <p>Enter a file name: ExportOfWorkflows.xml</p> <p>Select the Workflow objects</p> <p>Select the Backup button</p>							
	<pre> 10:06:18 : Server URL set to http://project.contoso.com/pwa1 10:06:18 : Initializing Web Services... 10:06:23 : Running application PlaybooksMainForm 10:06:24 : Initializing Settings Tree... 10:10:34 : 10:10:34 : ===== 10:10:34 : Backing up server settings to ExportOfWorkflows from server http://project.contoso.com/pwa1... 10:10:34 : ===== 10:10:34 : 10:10:34 : Load settings from server: 10:10:34 : Loading Custom Fields and Lookup Tables... 10:10:36 : Loading Enterprise Project Types... 10:10:36 : Loading Workflow Phases... 10:10:36 : Loading Workflow Stages... 10:10:37 : Loading Project Detail Pages... 10:12:02 : Loading Workflow Proxy User... 10:12:03 : 10:12:03 : Write server settings to XML structure: 10:12:03 : Writing XML data for Custom Fields and Lookup Tables... 10:12:03 : Writing XML data for Enterprise Project Types... 10:12:03 : Writing XML data for Workflow Phases... 10:12:03 : Writing XML data for Workflow Stages... 10:12:03 : Writing XML data for Project Detail Pages... 10:12:03 : Writing XML data for Workflow Proxy User... 10:12:03 : 10:12:03 : Writing Playbook to disk... </pre>						
<p>On the new environment:</p> <p>Deploy the workflow solution</p> <p>Add the Contoso Sample Workflow</p>	<p>Use the steps described in 5.7.2 Using a WSP package to deploy the WSP package and add the workflow to the Site collection.</p>  <table border="1"> <thead> <tr> <th>Workflow Name (click to change settings)</th> <th>Workflows in Progress</th> </tr> </thead> <tbody> <tr> <td>Contoso Sample Workflow</td> <td>0</td> </tr> <tr> <td>Sample Proposal Workflow</td> <td>0</td> </tr> </tbody> </table>	Workflow Name (click to change settings)	Workflows in Progress	Contoso Sample Workflow	0	Sample Proposal Workflow	0
Workflow Name (click to change settings)	Workflows in Progress						
Contoso Sample Workflow	0						
Sample Proposal Workflow	0						

Import the objects in the new environment using Playbooks.

Connect to the new Project Web App:
<http://finweb.contoso.com/PWA2>

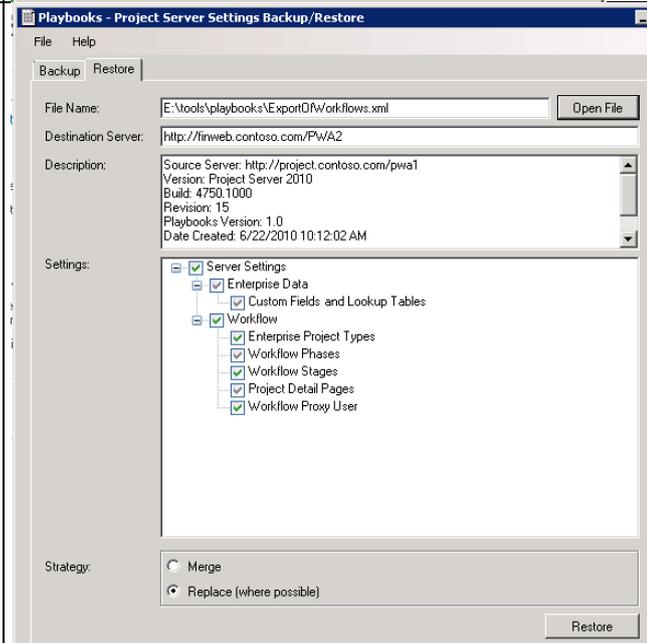


Select the Restore tab.

Enter the file name:
 ExportOfWorkflows.xml

The following objects are going to be restored

Click the restore button



```

PlaybooksLogger Started 06/22/2010
10:30:35
10:30:35 : Running application ServerUrlForm
10:31:29 : Server URL set to http://finweb.contoso.com/PWA2
10:31:29 : Initializing Web Services...
10:31:52 : Running application PlaybooksMainForm
10:31:52 : Initializing Settings Tree...
10:34:56 :
10:34:56 :
=====
10:34:56 : Reading server settings from E:\tools\playbooks\ExportOfWorkflows.xml
10:34:56 :
=====
10:34:56 :
10:34:56 :
10:34:56 : Read settings from XML data:
10:34:56 : Reading XML data for Custom Fields and Lookup Tables...
10:34:56 : Reading XML data for Enterprise Project Types...
10:34:57 : Reading XML data for Workflow Phases...
10:34:57 : Reading XML data for Workflow Stages...
10:34:57 : Reading XML data for Project Detail Pages...
10:34:57 : Reading XML data for Workflow Proxy User...
10:36:12 :
10:36:12 :
=====
10:36:12 : Restoring Settings to Server http://finweb.contoso.com/PWA2...
10:36:12 :
=====
10:36:12 : Restoring Project Detail Pages...
10:36:56 : Updating PDP ID from 55672f8d-c9f9-4864-be7e-bd6a5ff127a5 to 55672f8d-c9f9-4864-be7e-bd6a5ff127a5
10:36:56 : Updating PDP ID from 1f9d8fed-df74-4daf-af94-d327983c05e6 to 1f9d8fed-df74-4daf-af94-d327983c05e6
10:36:56 : Updating PDP ID from cdee4f89-44f6-4bd8-a240-a713c0960c44 to cdee4f89-44f6-4bd8-a240-a713c0960c44
10:36:56 : Updating PDP ID from 60ac4cf5-74f0-4858-97e3-416082396f3b to 60ac4cf5-74f0-4858-97e3-416082396f3b
10:36:56 : Updating PDP ID from 029c1e30-a656-461b-9137-b9e79a6e355c to 029c1e30-a656-461b-9137-b9e79a6e355c
10:36:56 : Updating PDP ID from 852159a7-dab1-4a80-a7b1-d061d290ca6d to 852159a7-dab1-4a80-a7b1-d061d290ca6d
10:36:56 : Updating PDP ID from 0e30384b-9a15-4279-9f7c-cb187a96da19 to 0e30384b-9a15-4279-9f7c-
  
```

	<pre> cb187a96da19 10:36:56 : Updating PDP ID from 1292fc75-f992-444c-9a84-c69da35a104f to 1292fc75-f992-444c-9a84-c69da35a104f 10:36:56 : Updating PDP ID from df32b008-02f8-4c79-b6c7-403093f46164 to df32b008-02f8-4c79-b6c7-403093f46164 10:37:29 : Restoring Custom Fields and Lookup Tables... 10:37:30 : Updating lookup table Department... 10:37:30 : Creating lookup table Funding Required... 10:37:30 : Updating lookup table Sample Primary Objective... 10:37:30 : Updating lookup table Cost Type... 10:37:30 : Creating lookup table On Budget... 10:37:30 : Updating lookup table Health... 10:37:30 : Updating lookup table RBS... 10:37:30 : Updating lookup table Sample Areas Impacted... 10:37:37 : Updating Custom Fields... 10:37:42 : Updating custom field Sample Compliance Proposal... 10:37:44 : Updating custom field Sample Approved Start Date... 10:37:44 : Updating custom field Sample Proposal Cost... 10:37:44 : Updating custom field Cost Type... 10:37:45 : Creating custom field Reasons... 10:37:46 : Updating custom field Project Departments... 10:37:46 : Updating custom field Sample Post Implementation Review Date... 10:37:46 : Creating custom field On Budget... 10:37:47 : Updating custom field Health... 10:37:48 : Creating custom field Funding Required... 10:37:49 : Updating custom field Sample Areas Impacted... 10:37:49 : Creating custom field Proposed Project Manager... 10:37:49 : Updating custom field Sample Primary Objectives... 10:37:51 : Updating custom field Flag Status... 10:37:52 : Updating custom field Sample Business Need... 10:37:52 : Updating custom field Sample Proposed Start Date... 10:37:53 : Updating custom field Sample Proposed Finish Date... 10:37:53 : Updating custom field Sample Goals... 10:37:53 : Creating custom field Lessons Learned... 10:37:54 : Updating custom field Resource Departments... 10:37:54 : Updating custom field Sample Post Implementation Review Notes... 10:37:55 : Updating custom field Team Name... 10:37:55 : Updating custom field Sample Approved Finish Date... 10:37:56 : Updating custom field Sample Assumptions... 10:37:57 : Updating custom field RBS... 10:37:58 : Restoring Workflow Phases... 10:38:04 : Restoring Enterprise Project Types... 10:38:06 : Restoring Workflow Stages... 10:38:09 : Restoring Workflow Proxy User... 10:38:11 : Restoring relationships for Custom Fields and Lookup Tables... 10:38:11 : Restore complete! 10:38:11 : </pre>																											
Associate the EPT to the Workflow	<table border="1"> <tr> <td>Contoso Project</td> <td>No Workflow</td> <td>Idea Collection</td> </tr> <tr> <td colspan="3">* Name:</td> </tr> <tr> <td colspan="3">Contoso Project</td> </tr> <tr> <td colspan="3">Description: (max 512 characters)</td> </tr> <tr> <td colspan="3"><input type="text"/></td> </tr> <tr> <td colspan="3">Site Workflow Association:</td> </tr> <tr> <td colspan="3">Contoso Sample Workflow</td> </tr> <tr> <td colspan="3">New Project Page:</td> </tr> <tr> <td colspan="3">Idea Collection</td> </tr> </table>	Contoso Project	No Workflow	Idea Collection	* Name:			Contoso Project			Description: (max 512 characters)			<input type="text"/>			Site Workflow Association:			Contoso Sample Workflow			New Project Page:			Idea Collection		
Contoso Project	No Workflow	Idea Collection																										
* Name:																												
Contoso Project																												
Description: (max 512 characters)																												
<input type="text"/>																												
Site Workflow Association:																												
Contoso Sample Workflow																												
New Project Page:																												
Idea Collection																												

Figure 49: Steps to Backup/Restore workflow configuration using Playbooks 2010

This tool exports all the workflows that are present in the PWA instance.

6.1.2 Solution starter EPT Export Import

This solution starter demonstrates how an Enterprise Project Type (EPT) and its related entities can be exported from one PWA environment and imported back into another. The import is done by registering a feature corresponding to the EPT and, on feature activation, creating all entities that support the EPT.

It is composed of the two projects:

-
- DMExport project
 - DMImport project

It can be downloaded from the following location:

<http://code.msdn.microsoft.com/P2010SolutionStarter>

7 DEBUG/MONITOR: TROUBLESHOOTING WORKFLOWS

In this chapter we will see how we can Debug a workflow during Development and also how to troubleshoot a workflow when it is running a workflow.

7.1 Debugging the workflow

In order to be able to debug your workflow you need to do the following:

1. Copy the PDB of your workflow assembly in the GAC
2. Attach the debugger to a specific process (Queue or w3p)

7.1.1 Copying the PDB of your assembly to the GAC

To be able to debug a workflow, you will also need to copy the PDB file of your assembly to the GAC.

You can use a batch file like this one to do that:

```
Copy
E:\ContosoSampleProjectWorkflow\ContosoSampleProjectWorkflow\bin\Debug\ContosoSampleProjectWorkflow.pdb C:\Windows\assembly\GAC_MSIL\ContosoSampleProjectWorkflow\1.0.0.0__a66c3f03618a253a
```

Figure 50: Script to copy assembly to the GAC for debugging purposes

To locate the directory of your assembly in the GAC, use the command line and navigate to the directory `C:\Windows\assembly\GAC_MSIL\YourAssemblyName`

You will then find the unique directory of your assembly.

7.1.2 Attaching the debugger

Depending on when you want to debug your workflow you will need to attach the Visual Studio debugger to different processes:

- Queue process
- W3P process

You need to attach to the Queue process:

- If you create a project
- If you restart a workflow from the server settings

You need to Attach to w3p:

- If you hit submit
- If you restart the workflow through the PDP page.

To locate the right w3p process on your server, you can use the IIS command line administrative tool **appcmd** that is located in the `C:\windows\System32\inetsrv` directory:

Appcmd list wp

```
C:\Windows\System32\inetsrv>appcmd list wp
WP "6712" <applicationPool:projectAppPool1>
WP "11756" <applicationPool:SecurityTokenServiceApplicationPool>
WP "14216" <applicationPool:ba5472e930c74d6f8d4ac2218875a8e8>
WP "6332" <applicationPool:FASTSearchAdminAppPool>
WP "12628" <applicationPool:19f9719881d4411c8bc1eaeef954e0b>
C:\Windows\System32\inetsrv>
```

Figure 51: Example showing the use of appcmd to get the w3P process number

In this case the application pool is named projectAppPool1, so the w3P process is 6712.

You can also use the techniques describe in this article to attach the debugger:

<http://blogs.msdn.com/b/sharepoint/archive/2007/04/10/debugger-feature-for-sharepoint.aspx>

7.2 Troubleshooting a Workflow

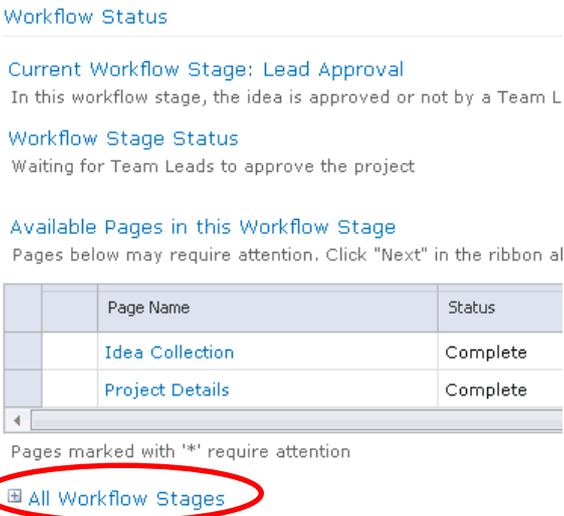
For information on how to troubleshoot a workflow, see the following article:

<http://blogs.technet.com/b/projectadministration/archive/2009/12/21/how-to-troubleshoot-your-workflows.aspx>

- Check the workflow status page
- Check the ULS logs

7.2.1 Check the workflow status page

There are two different ways to do this based on your need:

Actions	Screen						
<p>Check from within the project</p> <ul style="list-style-type: none"> ▪ Open a project with a failing workflow ▪ Go to the Stage Status Page. (This is the very first page from within a workflow stage.) ▪ From within the workflow status page, expand the “All Workflow Stages” section. 	 <p>Workflow Status</p> <p>Current Workflow Stage: Lead Approval In this workflow stage, the idea is approved or not by a Team L</p> <p>Workflow Stage Status Waiting for Team Leads to approve the project</p> <p>Available Pages in this Workflow Stage Pages below may require attention. Click "Next" in the ribbon al</p> <table border="1"> <thead> <tr> <th>Page Name</th> <th>Status</th> </tr> </thead> <tbody> <tr> <td>Idea Collection</td> <td>Complete</td> </tr> <tr> <td>Project Details</td> <td>Complete</td> </tr> </tbody> </table> <p>Pages marked with '*' require attention</p> <p>All Workflow Stages</p>	Page Name	Status	Idea Collection	Complete	Project Details	Complete
Page Name	Status						
Idea Collection	Complete						
Project Details	Complete						

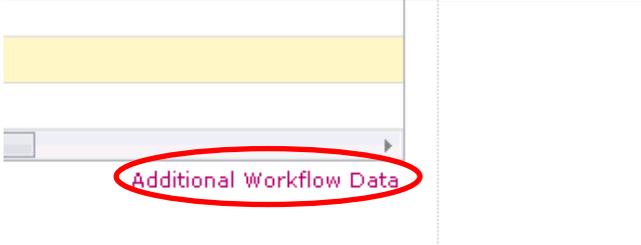
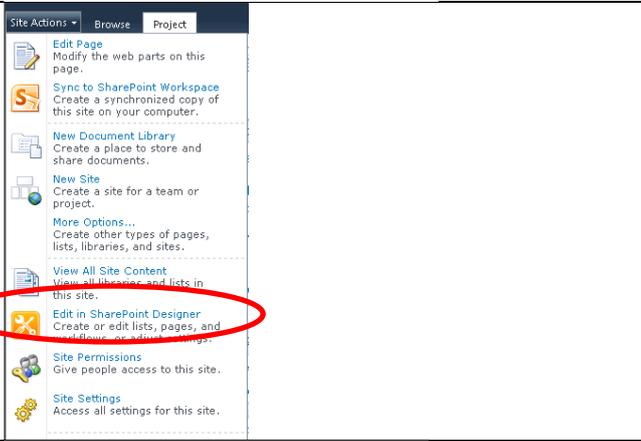
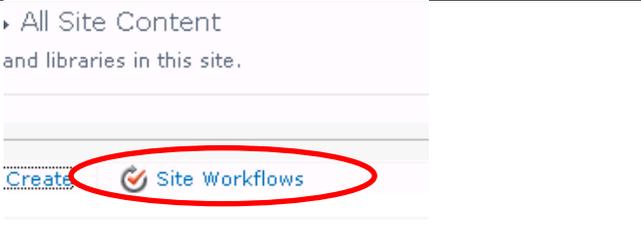
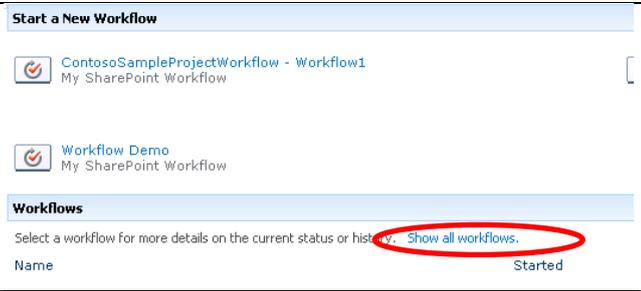
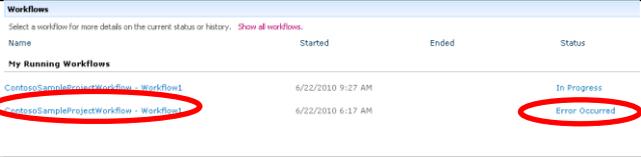
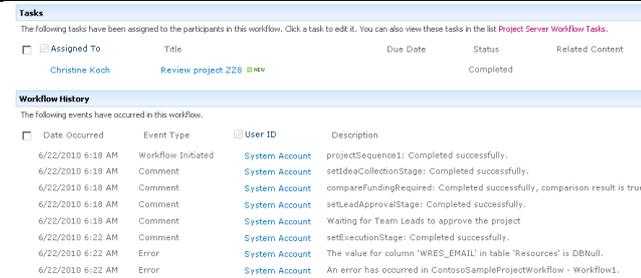
<p>Click the “Additional Workflow Data” link, which is round at the bottom right.</p>	
<p>If your project cannot be opened, you can also get to this page by:</p> <p style="text-align: center;">Site Actions, View All Site Content</p>	
<p>Click “Site Workflows”</p>	
<p>Click the “Show All Workflows” link</p>	
<p>Find the workflow that you are concerned about.</p>	
<p>Once you have opened the workflow status page, you can investigate the workflow history to see what the workflow was doing before it began to error.</p>	

Figure 52: Steps to troubleshoot a workflow

7.2.2 View the ULS logs

1. ULS logs can be found in: "C:\Program Files\Common Files\Microsoft Shared\Web Server Extensions\14\LOGS"
 - o Suggestion: Create a desktop shortcut on the server to this location.
2. Logs will be broken up into pieces. Find the log with a time stamp as close to the time you are most concerned about, and open it.
3. Some key words to look for when going through the logs are:
 - o SharePoint Foundation
 - o Startworkflow
 - o Winwf
 - o entering...activity
 - o leaving... activity
4. You can increase the logging level on the following categories from the central administration:
http://servername:Port/_admin/metrics.aspx
 - o Project Server: Project Server Workflow
 - o SharePoint Foundation: Workflow Infrastructure

8 REFERENCES

8.1 General references

Title	URL Reference
Project 2010 Web site	www.microsoft.com/project/2010
Project Server 2010 TechCenter (TechNet)	http://technet.microsoft.com/projectserver
Project 2010 Resource Center (MSDN®)	http://msdn.microsoft.com/Project
Project 2010 Video content	www.microsoft.com/showcase/en/US/channels/microsoftproject
Project 2010 webcasts and podcasts	www.microsoft.com/events/series/epm.aspx?tab=webcasts
Project 2010 Demo Image:	Download: http://go.microsoft.com/?linkid=9713956 Hosted Virtual Lab: http://go.microsoft.com/?linkid=9713654

Blogs	URL Reference
Official Blog of the Product Development group	http://blogs.msdn.com/project
Project Developer	http://blogs.msdn.com/project_programmability
Project IT Pro	http://blogs.technet.com/projectadministration

Additional questions? Project 2010 Forums!

<http://social.msdn.microsoft.com/Forums/en-US/category/projectserver2010,projectprofessional2010>

8.2 References given in this document

Document/Blo g	URL
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Source Code for the sample presented <http://code.msdn.microsoft.com/PS2010DMSample>

Demand Management in Project Server 2010 <http://go.microsoft.com/fwlink/?LinkId=191854>

How to Setup the Workflow Proxy Account <http://blogs.technet.com/projectadministration/archive/2009/12/21/how-to-setup-the-workflow-proxy-account.aspx>

Install SharePoint Server 2010, Project 2010 and Visual Studio 2010 on a single server <http://technet.microsoft.com/en-us/library/cc197667.aspx>

Configure Visual Studio 2010 for Project 2010 Workflow development in the Project Server SDK on MSDN <http://msdn.microsoft.com/en-us/library/ee767686.aspx>

Adding the Project Server Activities and SharePoint Server Activities in the Toolbox : [http://msdn.microsoft.com/en-us/library/ee767686\(v=office.14\).aspx#pj14_ConfiguringVS2010_ProjectServerTab](http://msdn.microsoft.com/en-us/library/ee767686(v=office.14).aspx#pj14_ConfiguringVS2010_ProjectServerTab)

Project Server 2010 SDK <http://www.microsoft.com/downloads/details.aspx?FamilyID=46007f25-b44e-4aa6-80ff-9c0e75835ad9&displaylang=en>

Error handling <http://msdn.microsoft.com/en-us/library/dd695716.aspx>

code to in a
workflow

Hot to use the http://blogs.msdn.com/project_programmability/archive/2010/02/10/how-to-skip-to-stage-feature-in-project-server-2010-workflows.aspx
Skip to stage
feature

Description of <http://msdn.microsoft.com/en-us/library/ee756398.aspx>
Project Server
Workflow
Activities

Description of <http://msdn.microsoft.com/en-us/library/ms473641.aspx>
SharePoint
Server
Workflow
Activities

Description of <http://msdn.microsoft.com/en-us/library/ee590729.aspx>
SharePoint
Server Office
Task Workflow
Activities

Description of <http://msdn.microsoft.com/en-us/library/ms594882.aspx>
Windows
Workflow
Activities

Solution <http://code.msdn.microsoft.com/P2010SolutionStarter>
starters for
Project Server
2010

Debugging <http://blogs.msdn.com/b/sharepoint/archive/2007/04/10/debugger-feature-for-sharepoint.aspx>
feature for
SharePoint

How to <http://blogs.technet.com/b/projectadministration/archive/2009/12/21/how-to-troubleshoot-your-workflows.aspx>
troubleshoot a
workflow
