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Gold Project and Portfolio Management

 [Content Updates](#)

# Electronic Addendum

## The Ultimate Application Administrator's Guide for Project Online

*A step-by-step guide for setting up and maintaining  
Microsoft's Project and Portfolio Management environment*

**AUTHORS:**

Nate Auchter, Dale Howard,  
Terry Kneeburg, Walt Nickel, and Chad Olson

EDITORS: Steve Caseley and Diedre Emerson

CONTRIBUTOR: Kenneth Steiness

## Electronic Addendum

Sensei Project Solutions is pleased to provide this electronic addendum to "The Ultimate Application Administrator's Guide for Project Online". As Microsoft continues to provide incremental updates and on-going improvements to Project Online, Sensei will provide supplementary content updates to the Application Administrator's guide in this electronic addendum document.

This addendum will be updated based on changes introduced by Microsoft to Project Online that impact the administration of your installation. As a registered owner of this book, you will be notified by email when updates are issued.

When a specific change impacts several sections of the book, we will simply document the change once. For example, one of the early changes by Microsoft was to change the licensing model from two to three plans. While there are several areas in the book which reference licensing, we simply have documented the change without explicitly calling out each specific page impacted.

In other instances, where a change from Microsoft explicitly changes a specific section of the book, we will call out the appropriate section and in most instances, provide the replacement (or additional) text for impacted areas.

Finally, if you find items which you believe are wrong or out of date, please contact us to bring it to our attention. Email any updates or concerns to us at [info@senseiprojectsolutions.com](mailto:info@senseiprojectsolutions.com).

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## Addendum Updates 1 - June 2017

### Licensing Model Updates

Microsoft has introduced changes to the licensing model for Project Online and now offers three plans as opposed to the original two. This is referenced in multiple locations throughout the book.

There are three plans available to access PWA: they are called 'Project Online Essentials', 'Project Online Professional' and 'Project Online Premium'.

'Project Online Premium' gives a user full access to the complete project and portfolio management solution.

'Project Online Professional' is intended for project managers and others who will be updating the project schedule and supports project management in the cloud through desktop client and web-browser solutions.

'Project Online Essentials' allows team members to manage tasks, collaborate and submit timesheets. It is not a stand-alone product and is used only for projects managed with PWA.

Team members and other users who only need to view schedule details should use 'Project Online Essentials', project managers and team leaders should use 'Project Online Professional' and all other users, specifically resource managers, program and portfolio managers should use 'Project Online Premium'.

As the 'Project Online Professional' and 'Project Online Premium' now includes Microsoft Project Pro for Office 365, organizations no longer need to license the desktop tool separately.

## Terminology Change – DIRSYNC is now AD Connect

Microsoft has renamed 'DirSync' to 'AD Connect', therefore, all references in Chapters 1 and 2 to DirSync, should now be AD Connect.

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## Team Tasks and Task Assignment Pool

Microsoft has added additional functionality to managing team assignments. The following content should be applied to Section 5.7, Setting Your Task Tracking Options on page 317.

### *Team Tasks and Team Assignment Pool*

This option allows you to control the behavior of team task assignments when a team member begins working on the task.

If you wish to keep a team task assigned to the team assignment pool, when a team member adds it to their timesheet, select this checkbox. An additional assignment will then be created for the team member, while the original team task will remain so that other team members can add the team task to their timesheet.

If this option is not selected, when a team member adds it to their timesheet, the team task will be reassigned to the team member and will no longer be assigned to the team assignment pool.

#### Team Tasks and the Team Assignment Pool

Select this checkbox to keep a team task assigned to the team assignment pool when a team member adds a team task to their timesheet. An additional assignment will be created for the team member. Other team members can also add the team task to their timesheet.

If this option is not selected, when a team member adds a team task to their timesheet, the team task will be reassigned to the team member and will no longer be assigned to the team assignment pool.

☐ Allow team tasks to be assigned to the team assignment pool and multiple team members

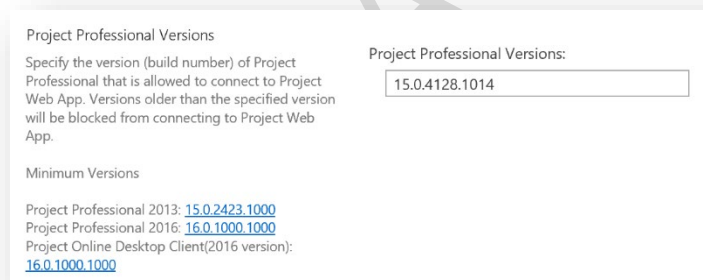
*Team Tasks and the Team Assignment Pool checkbox*

## Minimum Version of Microsoft Project Professional

Microsoft added the minimum version level of Project Professional that will work with the current PWA configuration. Your organization can use this setting to specify a higher version level as appropriate for organizational requirements. The following content is an update to Section 10.2, Setting the Minimum Version of Microsoft Project on page 722.

The single option in the 'Project Professional Versions' section allows you to control the minimum version (also known as the "build number") required for Microsoft Project to be able to connect to Project Web App (PWA). Microsoft has defined the minimum versions of Project Professional 2013, 2016 and Office 365 which are compatible with the current PWA configuration.

You can use this option to prevent Microsoft Project users from connecting to PWA if they are using the wrong release of the software (such as the 2013 version when they need the 2016 version), or if they have not updated their software with the latest Service Packs and Cumulative Updates specific to your organizational requirements. Users must have a software version that is greater than or equal to the minimum number you set to be able to connect to PWA.



The screenshot shows a configuration window titled "Project Professional Versions". It contains two main sections. The first section, "Project Professional Versions:", includes a text box where the value "15.0.4128.1014" has been entered. The second section, "Minimum Versions", lists three minimum required versions: "Project Professional 2013: 15.0.2423.1000", "Project Professional 2016: 16.0.1000.1000", and "Project Online Desktop Client(2016 version): 16.0.1000.1000". All version numbers are displayed as blue, underlined links.

*Project Professional Versions section*

#### Text Correction – Page 751 and 752

On pages 751 and 752, we state “(See the section below in this chapter titled ‘Researching Common Errors’)”.

The sub-section header ‘Researching Common Errors’ was removed during final editing. This sentence should be ignored as the text that follows immediately after in the book describes the process for ‘Researching Common Errors’.

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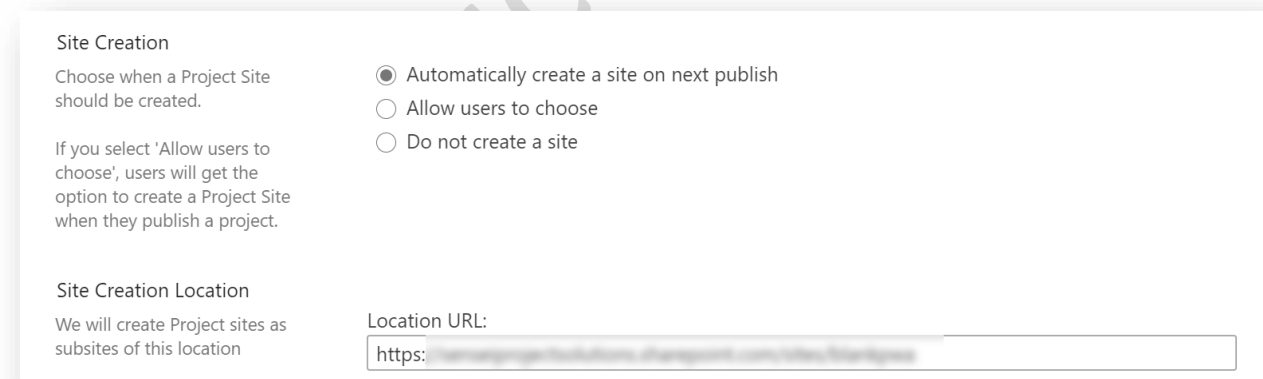


## Project Site Creation

Since the release of Project Online, we've had the ability to control how all project sites were created through a PWA Settings page called 'Connected SharePoint Sites'. The 'Settings' dialog allowed us to choose whether sites were created automatically on first publish, allow users to choose (only when publishing from Microsoft Project), or to not create a site at all. It also allowed us to control whether we wanted to sync the tasks from the project schedule to the tasks list on the project site for team visibility. These settings have been moved to the Enterprise Project Type configuration page providing much more flexibility and control in managing projects and their corresponding project sites. These changes apply primarily to Section 7.3.7, Understanding the Prerequisites for Enterprise Project Type Creation beginning on page 452. However, there are references in Chapter 2 specific to permissions synchronization and Chapter 8 specific to task list synchronization.

## Updated Enterprise Project Type Configuration Page

Navigate to 'PWA Settings > Enterprise Project Types' to access the new settings.



**Site Creation**

Choose when a Project Site should be created.

If you select 'Allow users to choose', users will get the option to create a Project Site when they publish a project.

☒ Automatically create a site on next publish

☐ Allow users to choose

☐ Do not create a site

**Site Creation Location**

We will create Project sites as subsites of this location

Location URL:

https://contoso.sharepoint.com/sites/ProjectSite

## Project Site Settings section

Site Creation: This is used to control when sites are created. This allows for more flexibility as the rules are defined for each EPT:

- We can have certain EPTs that get project sites from the beginning and others that do not.
- If the project is created and published in Microsoft Project, since the project is classified as the 'default' project type, you can now choose to defer creating a site until the EPT is validated/set.

- The 'publish' step can be defined in a project workflow to create the project sites for new projects. This also ties into the point above, because when we change an EPT for a project, the new workflow is started, so if 'next publish' is built into this workflow, the appropriate project site will then be created. Note – the action that should be used in a project workflow to automate the 'Publish Project' action.

We can still leverage the 'CreateProjectSite' method in the REST API to have the project site created at an alternate point in the project lifecycle.

Site Creation Location: As this is now associated with an individual EPT, we can specify an alternate location for project sites.

There are a few details that you should know about this:

- You must have created the new site collection in which you wish to create your project sites prior to configuring the URL as the Site Creation Location. SharePoint will not create a new site collection based on the address entered in the 'Location URL' field.
- It was our experience as a first-release tenant that a new EPT had to be saved once before you can edit the 'Location URL'.
- If you have a CUSTOM site template specified in the EPT configuration that needs to be used with an alternate site collection, that template solution must be added to the solutions library of the new site collection. If you don't do this, you will get a queue job failure.
- If you have created a model site for project site template development in which you have activated the 'Project Web App Connectivity' site feature and you wish to use this site template in an alternate site collection then that site collection MUST be PWA enabled. If you do not want a PWA-enabled alternate site collection to house these project sites, you won't be able to use this 'migrated' template; instead you'll need to create a new template in the alternate site collection based on a project site created there without activation of the 'Project Web App Connectivity' site feature. Otherwise you will get a queue job failure message.
- Synchronization settings work as they always have for sites created in the same site collection as the project, but permissions sync and task list sync settings do not work for project sites created in alternate site collections.
- To leverage various default site template languages, your site template must support the specific language required. If you select a certain language from the 'Site Language' menu and the site template does not support that language, the EPT configuration page will show "The operation could not be completed" and prevent saving of the EPT.

## Power BI Subscriptions

Microsoft has changed the subscription model for Power BI. The following content is an update to the last paragraph in Power BI subscriptions on page 28.

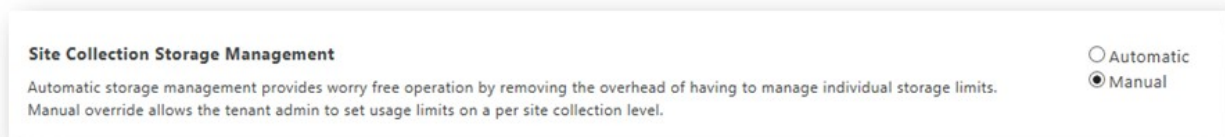
If a Power BI Pro or Premium license is not purchased users will be able to access data and create content for themselves but will not be able to share or consume shared content.

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## Site Collection Storage Management

Microsoft has introduced changes to support automatic storage management. The following is an addition to the content in Section 1.4.1, Understanding the Default and Recommended Settings for PWA beginning on page 36.

SharePoint Online now offers automatic storage management. We recommend that you take advantage of this feature unless you have specific organization requirements for manually managing individual site collection storage quotas. 'Automatic' is the default setting for new Office 365 tenants, but if you have a need to check or change this setting, please visit the SharePoint admin center, then click 'Settings'. Under the 'Site Collection Storage Management' option, you'll see two settings, 'Automatic' and 'Manual'.



If your requirements dictate that you need to manually manage the site collection storage quotas, we recommend at least 50 GB for the production Project Web App enabled site collection.

NOTE: The 50 GB we recommend above will be additional storage for content above a 25 GB limit reserved for projects, timesheets, resources, and other project related data and configuration.

### Text Correction – Page 592

On page 592, Step 8, we state “Under ‘Navigation Inheritance’ select ‘Yes’ for ‘Use the top link bar from the parent site’”. This will ensure that any updates to the global navigation for PWA will be inherited to your template development site.

While this statement is true, it also leads to the assumption that the sites created from the template would also inherit this top link bar. It is our experience that any sites created from a template that was made from the model site will not inherit the top link bar.

Therefore, we are recommending that you do not set this option, and Step 8 should be updated to read:

Under ‘Navigation Inheritance’ select ‘No’ for ‘Use the top link bar from the parent site’.

## Addendum Updates 2 – April 2020

Microsoft has added the ability to control the granularity of timephased data that is available for reporting. The following content is added as a new section at the end of Chapter 3.

### Reporting Settings

The **Reporting** settings may be found in the **Enterprise Data** section of **PWA Settings**. We recommend carefully considering your reporting requirements prior to configuring this setting as there is a significant impact on performance. If timephased data is not needed for reporting, select the **Never** option, which is the default. If timephased reporting is required, choose the level of granularity required: **Daily**, **Weekly**, **Monthly**, or **By fiscal period**. The **Daily** setting is the most granular and will consume the most resources of the available settings. For example, if you need to report on monthly project costs, select the **Monthly** option as shown below. Note that this setting also controls the granularity of the data displayed in the Resource Center Resource Assignments and Capacity Planning views, so if you intend to utilize those views you should select an option other than **Never** in order to see data there.

If this setting is changed, each project needs to be re-published to update the reporting data. Timesheet reporting data is not affected by this setting.

## Reporting ⓘ

Save

Cancel

### Timephased Data

Choose the level of granularity that the timephased data will be generated.

*Important: Each project needs to be published to reflect any changes in options. The Timesheets reporting endpoints are not affected.*

☐ Never

☒ Daily

☐ Weekly

Weekly timephased data will use the [Regional Site Settings](#) definitions of:

- First day of the week
- First week of the year

*Important: If you change the first day of the week or year after projects have been published using the weekly option, you will need to republish all projects.*

☐ Monthly

☐ By fiscal period

By fiscal period timephased data will use the fiscal periods defined in the [Fiscal Periods](#) section.

*Important: Reporting data will only be generated for defined fiscal periods. Also, if you change an existing fiscal period, you will need to republish all projects.*

Save

Cancel

### Reporting settings page

#### Additional Server Settings

The Additional Server Settings page has received several additions related to Permission Management, Project Web App Usage, and Asynchronous Event Handling. The following content is added as new sections to the end of Chapter 10.

#### Permission Management

Previously the Permissions Mode setting was only available in SharePoint Online Administration. Refer to Section 2.3 for a full explanation of Permissions Mode. The Permissions Mode may now be set on the **Additional Server Settings** page in **PWA Settings**.

Permission Management

☐ SharePoint Permission Mode  
Manage users and groups directly in SharePoint.
   
☒ Project Permission Mode  
Manage users, groups, and categories, in Project Web App.

### Permissions Management setting

### Project Web App Usage

The storage space consumed by the Project Web App site is now visible on the **Additional Server Settings** page. Note that the storage amount does not include SharePoint content in the site collection. Microsoft provides an initial quota of 25 GB, which should be ample for most deployments. Contact Microsoft if a quota increase is needed.

Project Web App Usage

Project Web App Size Using 6 MB of 25600 MB available

### Project Web App storage consumption

### Asynchronous Event Handling

Add-ins can respond to events being raised in Project Online and complete additional activities based on those events. Users may have to wait for the add-in to complete the event handling before they can continue working with Project Online. If the add-in will support it, enable the **Turn on asynchronous After event processing** setting.



#### Asynchronous event handling for After events

Enable asynchronous event handling for after events. This enables the UI to render while add-ins are processing these events. Enabling this setting requires that add-in code be modified to handle these events asynchronously. [Learn More](#)

☒ Turn on asynchronous after event processing

#### *Asynchronous event handler setting*

#### User and Task Sync Settings

The Manage User Sync Settings page described on p. 154 and pp. 586-588 has been modified to remove the Project Site Sync settings, as shown below.

### Project Permission Sync Settings ⓘ

#### Sync options

☒ Enable Project Web App Sync

#### Sync Status

The last sync ran successfully on 4/20/2020 6:05:48 PM

Save

Cancel

#### *Project Permissions Sync Settings*

In addition, the Sync Enterprise Projects tasks to Task List setting described on p. 614 has been relocated to the Enterprise Project Type configuration page.

Both settings are now configured separately for each Enterprise Project Type (EPT). The behavior of these settings is the same as before, but we now have much more flexibility in controlling site permissions and task lists sync for different types of projects. Refer to Section 7.3 for more information on configuring an EPT.

### Synchronization

Turning on User Permissions Sync will grant project work resources permissions to the Project Site.

- ☒ Sync User Permissions
- ☒ Sync SharePoint Tasks Lists

Note: Only Project Sites created inside of the Project Web App site will synchronize user permissions.

Synchronizing SharePoint Tasks Lists will copy tasks to the SharePoint Tasks List when the Enterprise Project Feature is activated. Only Project Sites created inside of the Project Web App site will synchronize tasks.

Note: SharePoint Tasks list will be read-only.

*SharePoint Permissions and Task List Synchronization Settings for an Enterprise Project Type*