# ThorApps Online Services

No nonsense tools, apps and add-ons for SharePoint

# Project Sync Service Activation Guide

Author: Michael Bear

Date: 06 Oct 2018

Version: 1.1

# Overview

Follow this guide to understand how to add the ThorApps Project Sync Service to a PWA site collection. Note, Project Sync Service cannot be installed on to a non-PWA site collection.

If you are an experienced user, you could complete the steps in less than 10 minutes. If it's your first time, maybe 30 minutes to an hour.

In this guide you will…

1. Create a Sandpit PWA site collection
2. Add the Project Sync Service Apps to the PWA site collection

# Prerequisites

To follow this guide, you will need access to the following:

- An O365 tenant
- Access to Administer SharePoint Online in the O365 tenant
- An understanding of basic SharePoint terminology and navigation

# Create a Sandpit site collection

Using the steps described in the Installation Guide, navigate to the "SharePoint admin center".

Click "site collections".

Click "New".

Click "Private Site Collection with Project Web App".
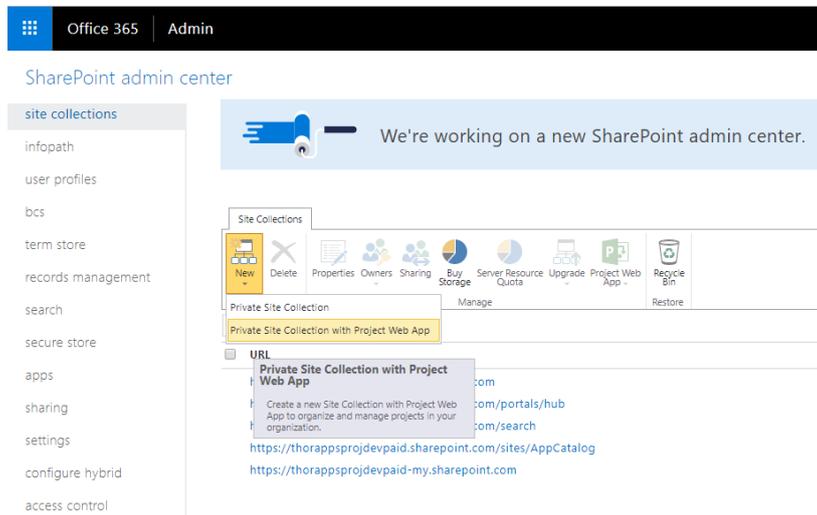


Create a new PWA site collection called "SandpitWithPWA".



Click "OK" and wait for SharePoint to complete the operation.
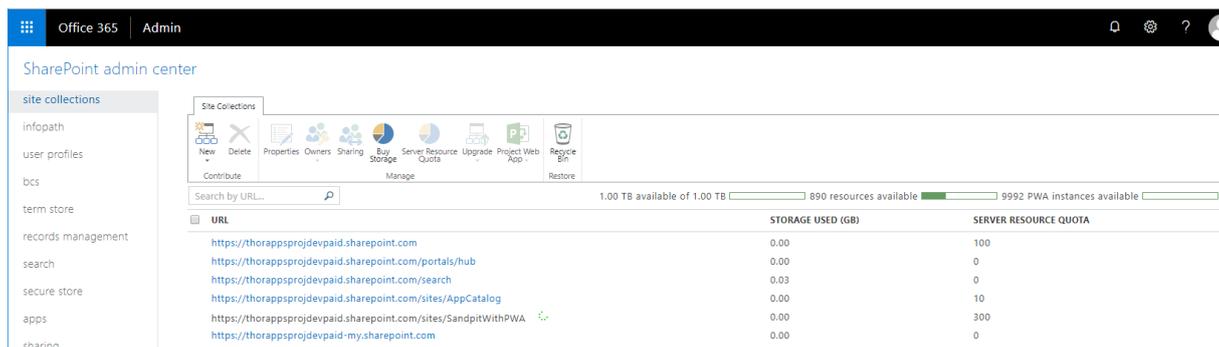
# Add the Project Sync Service App to the site collection

Open a new browser tab.

Enter the address of the newly created site collection (from the previous section). It should be a standard PWA site with no branding.
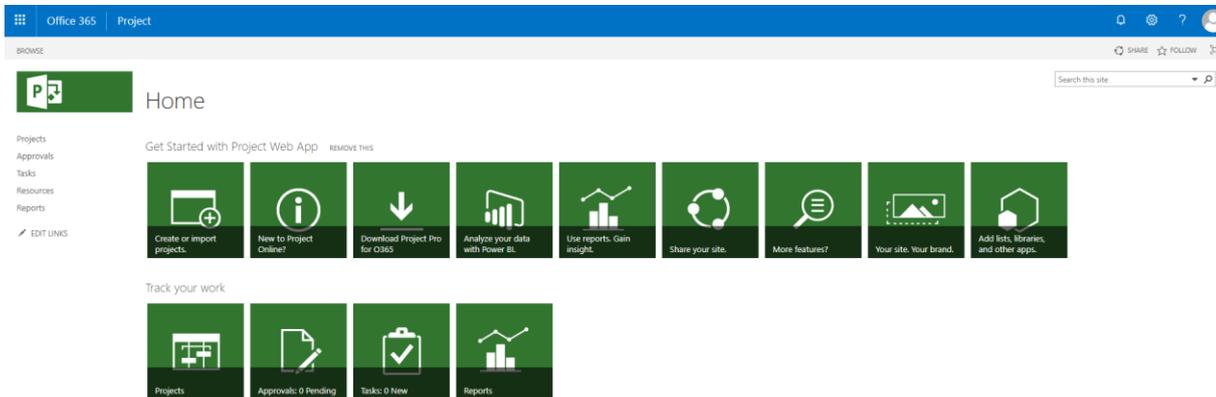


Click on the Gear/Cog icon in the upper right corner.

Click "Site contents".
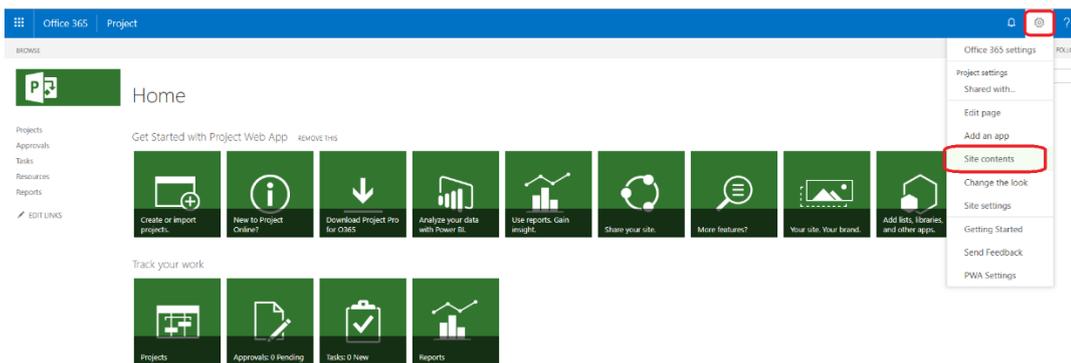


Click "add an app".
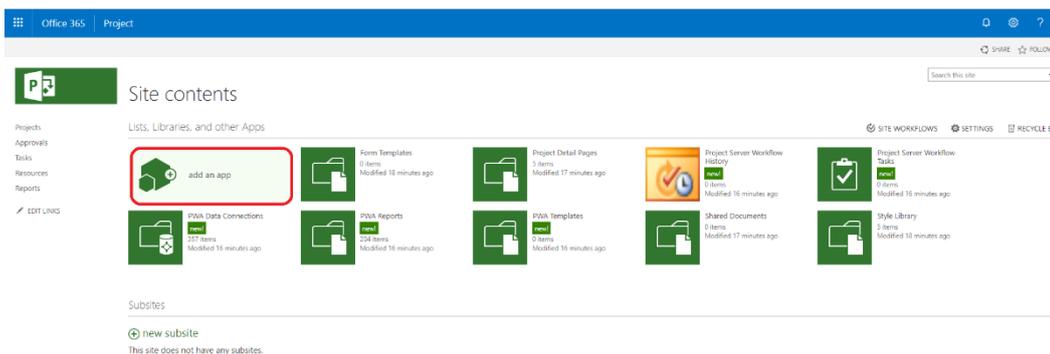


Click "Project Sync Service".

Select your local language.

Click "Trust It".

Wait for the apps to be installed by SharePoint Online.

Once installed, the "Project Sync Service" logos will be visible on the app tiles.

Click the "Project Sync Service" app tile to enter its setup wizard.



Click "Next".

Back to Site ▸ ThorApps - Project Sync

## ThorApps - Project Sync

Environment : Undefined

Home

Database Setup start

This wizard will guide you through configuring 'ThorApps - Project Sync' on this site.

Next

Enter details for your environment name (we recommend calling this environment DEV as it can be re-used later.

Back to Site ▸ ThorApps - Project Sync

## ThorApps - Project Sync

Environment : Undefined

Home

### Environment selection

ThorApps Online Services cater for multiple environments. You can create (for example) Development, UAT and Production environment divisions and use change management procedures to promote configuration changes through the environments.

ThorApps App instances must be mapped to an Environment and different Apps within the same site collection must/will be mapped to the same Environment.

Environment   [Add new ▼]
Abbreviation  [_____]  (e.g. PROD)
Full Name     [_____]  (e.g. Production)

Preferred Data Centre [Please select ▼]
Email Address  [_____]
First Name     [_____]
Last Name      [_____]
Phone Number   [_____]

[ Previous ]  [ Next ]

Click "Next".

Back to Site ▸ ThorApps - Project Sync

## ThorApps - Project Sync

Environment : Undefined

Home

### Database Setup finish

Clicking 'Finish' will create a back ground job to setup an environment as you have specified using this wizard.

[ Previous ]  [ Finish ]

Click "Finish" and wait for it to provision back-end components (an Azure SQL database).

Back to Site ▸ ThorApps - Project Sync

## ThorApps - Project Sync

Environment : Development

Home

We're working on it...

This page will refresh every minute or so. We're just setting a few things up...

This may take up to 10 minutes to complete.

You will be asked to create and verify an account with Admin rights for Project Sync to use when querying your Project Online environment.

## ThorApps - Project Sync

Environment : Development

Home
Service Accounts
Entity Type Sets
Entity Types
Events
Settings
Queue
Jobs
debug JSON

### Project Online connectivity

Project Sync currently does not support App Only authentication. Therefore you need to create an account for ThorApps Online Services to use when querying your Project Online environment.
This account MUST have admin rights in Project Online as it needs to register remote event handlers and read ALL project data.
Please make sure this account has a **VERY complicated password** that is set to either never expire or has a very long expiry time (you can change this password later and you will be prompted if the password has expired).

Account Name [ _____ ]

Password [ _____ ]

Not Verified [ Verify ]

[ Next ]

## ThorApps - Project Sync

Environment : Development

Home
Service Accounts
Entity Type Sets
Entity Types
Events
Settings
Queue
Jobs
debug JSON

### Project Online connectivity

Project Sync currently does not support App Only authentication. Therefore you need to create an account for ThorApps Online Services to use when querying your Project Online environment.
This account MUST have admin rights in Project Online as it needs to register remote event handlers and read ALL project data.
Please make sure this account has a **VERY complicated password** that is set to either never expire or has a very long expiry time (you can change this password later and you will be prompted if the password has expired).

Account Name [ _____ ]

Password [ _____ ]

Verified [ Verify ]

[ Next ]

Once verified, re-enter the password.
Click "Next".
Click "Finish".

## ThorApps - Project Sync

Environment : Development

Home

Service Accounts

Entity Type Sets

Entity Types

Events

Settings

Queue

Jobs

debug JSON

### Connectivity Setup finish

Clicking 'Finish' will create a back ground jobs to register event handlers, update the database schema based on your custom field configuration and reflect all project data for reporting.

[ Previous ]  [ Finish ]

You will be presented with the following "Jobs" screen.

Back to Site ▶ ThorApps - Project Sync

# ThorApps - Project Sync

Environment : Development

Home

Service Accounts

Entity Type Sets

Entity Types

Events

Settings

Queue

Jobs

debug JSON

Included Job Status ☑ Waiting      Created in the Last Hour ▼

☑ Processing

☐ Completed

☐ Cancelled

☑ Errored                           Apply Filter

| Job | Type | Status | Created | Started | Completed | Start Delay | Duration |
|---|---|---|---|---|---|---|---|
| Job : 2018-10-05 11:49:06 | ScheduledTimerJob | Waiting | 2018-10-05 11:49:06 | | | 07:40 | |
| Job : 2018-10-05 11:56:58 | ImportEntityTypeSetJob | Waiting | 2018-10-05 11:56:58 | | | 12 | |

First   Previous   1   Next   Last

Showing 1 to 2 of 2 entries

Wait for the "ImportEntityTypeSetJob to complete before proceeding.
Click "Back to Site" in the upper left.

# Verification Testing

There are several methods to verify Project Sync Service is now working correctly:

- Using Excel
- Using SQL Server Management Studio (SSMS)
- Using SQL Server Reporting Services (SSRS)
- Using PowerBI Desktop

Regardless of the method used, there will need to be at least one existing project in the PWA site collection. If Project Sync Service has been installed on a new PWA site collection, we will need to create a test project. You can omit this and go straight to validating the activation if this PWA site collection already has existing projects.

From the Quick Launch, click "Projects".
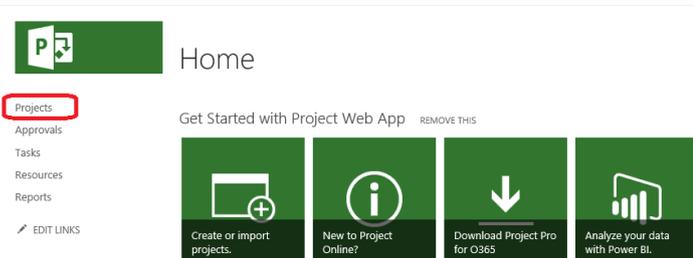


Click the "PROJECTS" tab.
Click "New".
Click "Enterprise Project".
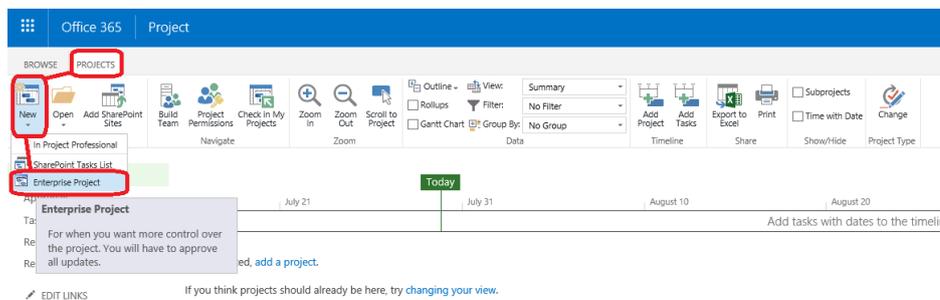


Name it "Sample Project", or similar, give it a description, assign an Owner.
Click "Finish".
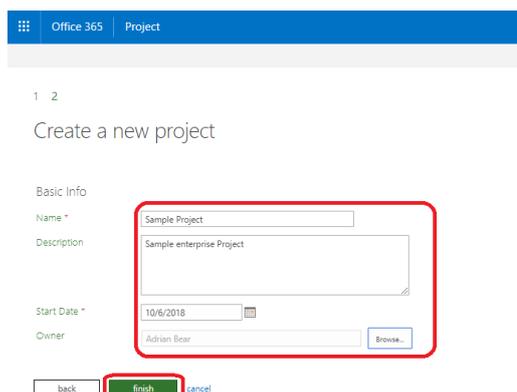
Once the project is created, add some tasks.
Click "Project"
Click "Publish".





To monitor the publish job process, return to the app by clicking the cog in the upper right, selecting "Site Contents", and clicking the app icon.

From the app home page, click "Jobs" in the menu. This will display all currently running jobs. You can also view completed jobs here.



ThorApps - Project Sync

Environment : Development

| | Included Job Status | ☑ Waiting | Created in the Last Hour ▼ | | | | | | |
|---|---|---|---|---|---|---|---|---|---|
| Home | | ☑ Processing | | | | | | | |
| Service Accounts | | ☐ Completed | | | | | | | |
| Entity Type Sets | | ☐ Cancelled | | | | | | | |
| Entity Types | | ☑ Errored | | Apply Filter | | | | | |
| Events | | | | | | | | | |
| Settings | Job | ▲ Type | Status | Created | Started | Completed | Start Delay | Duration |
| Queue | Job : 2018-10-06 10:29:52 | SynchEntityTypePageJob | Processing | 2018-10-06 10:29:52 | 2018-10-06 10:29:52 | | 00 | |
| Jobs | Job : 2018-10-06 10:29:54 | EventProcessorJob | Waiting | 2018-10-06 10:29:54 | | | 15 | |
| debug JSON | | | | | | | | |

First   Previous   1   Next   Last

Showing 1 to 2 of 2 entries

# Verifying with Excel

From the Quick Launch, click "Service Accounts".

Click "Show Database Reader".
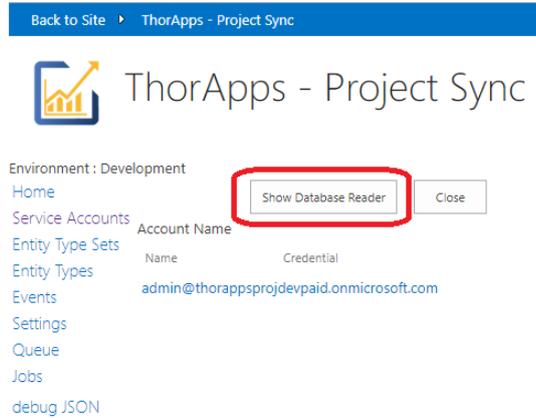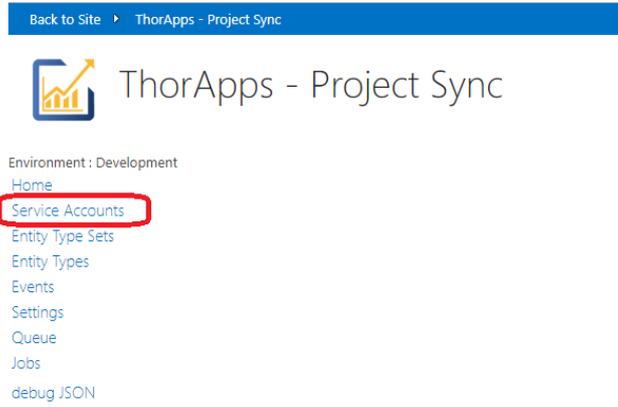


This will display values for:

- SQL Server Name
- SQL Database Name
- Account Name
- Password

Leave this open, as we will refer to it shortly.

Open a new workbook in Excel.

Click the "Data" tab.

Click "Get Data".

Click "From Database".

Click "From SQL Database".
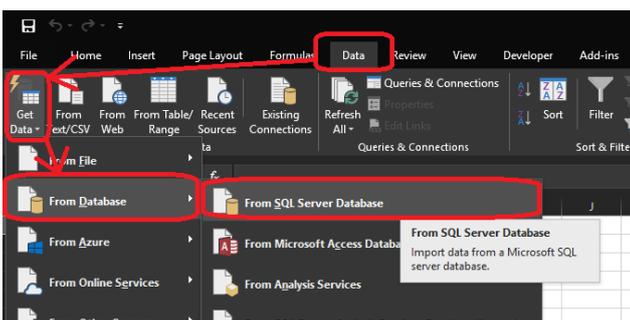


Enter the Server and Database names from the Database Reader viewed earlier.
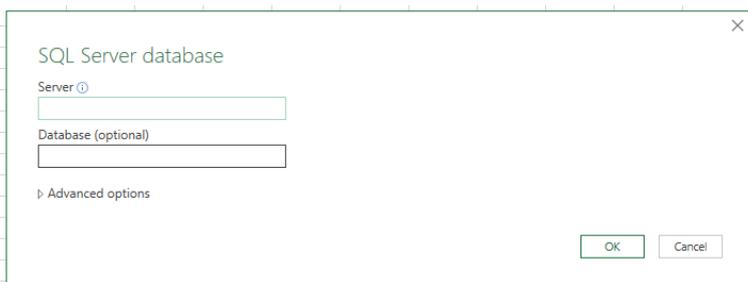
Click the "Database" tab

Enter the credentials from the Database Reader viewed earlier.
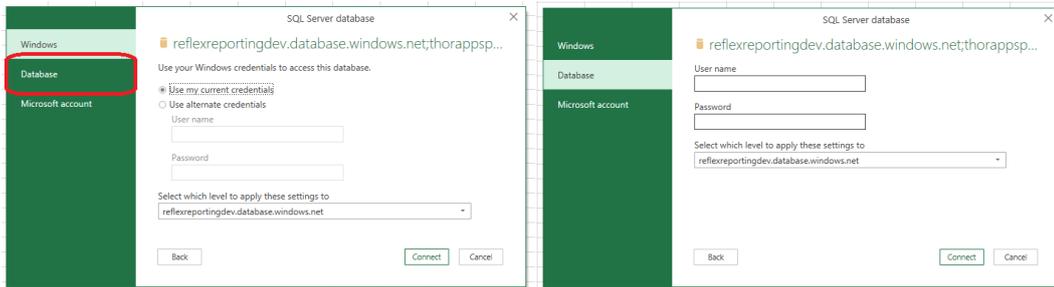


Click "Connect"
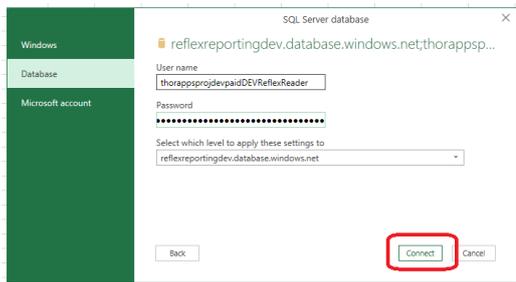


Select the odata.Project table, and click "Load".
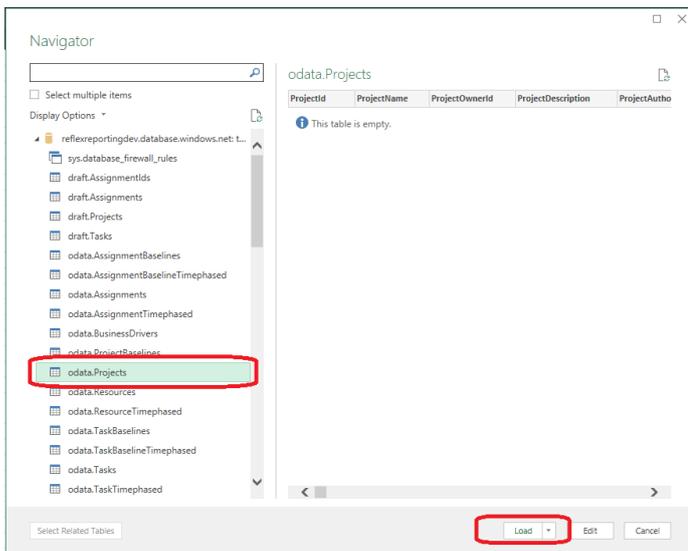


Here we can see the data from the Sample Project we created earlier.
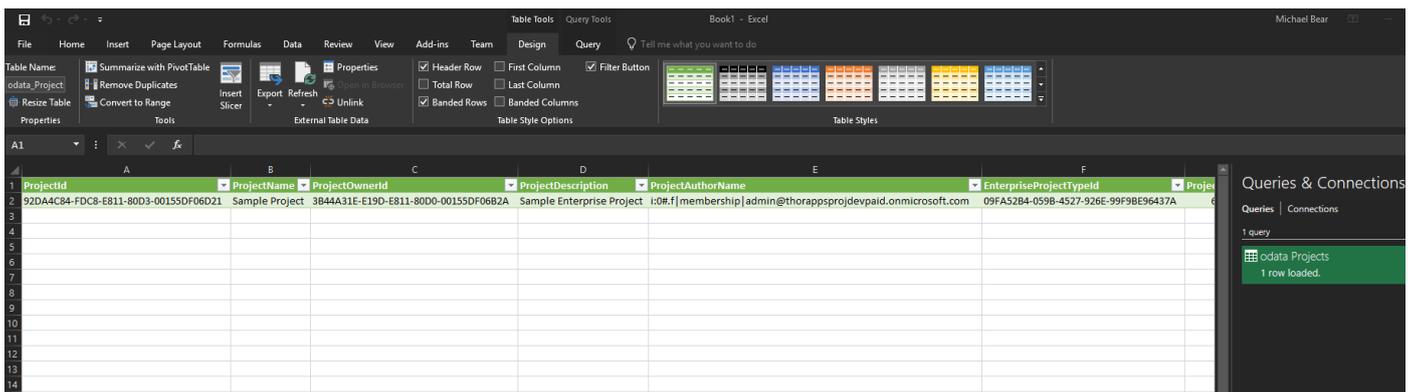
# So what's next?

## Configuration

Now that you have installed and activated Project Sync Service, you will want to follow the configuration guide included in the download package. This guide will show you how to configure Project Sync Service.

## Purchasing

If you have completed the solution installation and configuration and have decided to purchase a license, follow the purchasing guide included in the download package.

## License Activation

If you already have a license for Project Sync Service and wish to activate it, follow the license activation guide included in the download package.