

Getting Started With IntelliGantt™ Add-in for Microsoft Project

Introduction

TeamDirection® IntelliGantt™ Add-In for Microsoft Project allows you and the rest of your project team to collaborate on your projects together. This guide is broken into two main parts to help you get up to speed on your projects as quickly as possible.

1. **Share** your project using a 3rd party platform or just use an Internet Workgroup that TeamDirection provides for you.
2. **Join** a project that someone else has shared so you can see the schedule and update your status.

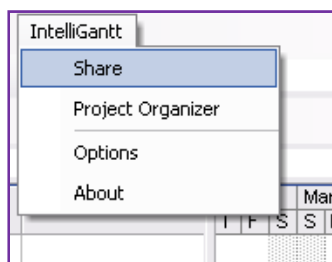
All of the IntelliGantt functions are accessed directly in Microsoft Project from the **IntelliGantt** menu on the menu bar.

Sharing Your Project with Your Team

Once you have your project created, it is time to share it so that the entire team can join and make their contributions. You can choose to share your project on a SharePoint or Groove 2007 workspace, or by using a TeamDirection Internet Workgroup.

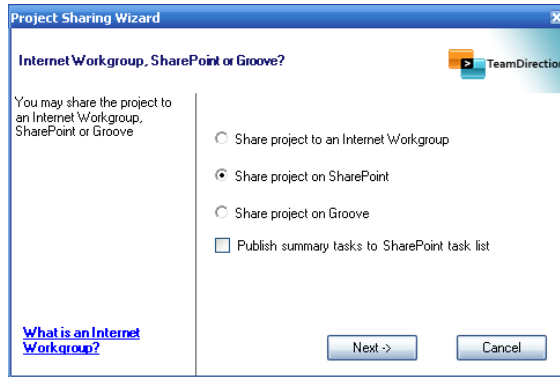
Share your project to a SharePoint site

To share a project to SharePoint, Choose Share from the IntelliGantt menu in the menu bar to start the share wizard.



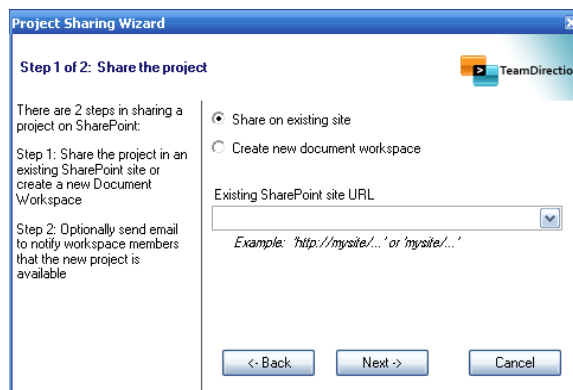
Select Share from the IntelliGantt menu to start the Share wizard

In the wizard, confirm that you want to share the project and then select **Share project on SharePoint** and press the Next button.



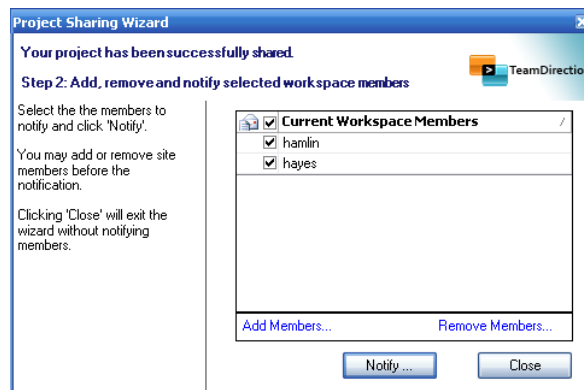
Choose the collaboration platform you want to use with your team

Enter the site address (URL) of the SharePoint site that you want to share your project to and press **Next**.



Enter in the SharePoint URL for the site you want to share to

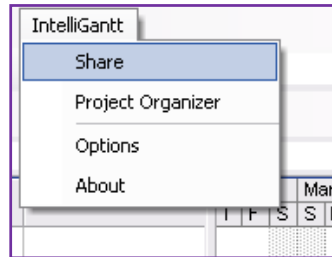
The final screen will show all the existing members of the SharePoint workspace that the project has been shared on. You can add or remove members using the **Add members...** and **Remove members...** link. Pressing the **Notify...** button will send an email invitation to the selected members.



Members that are in the SharePoint workspace will appear in the list. Select **Notify** to invite the selected members

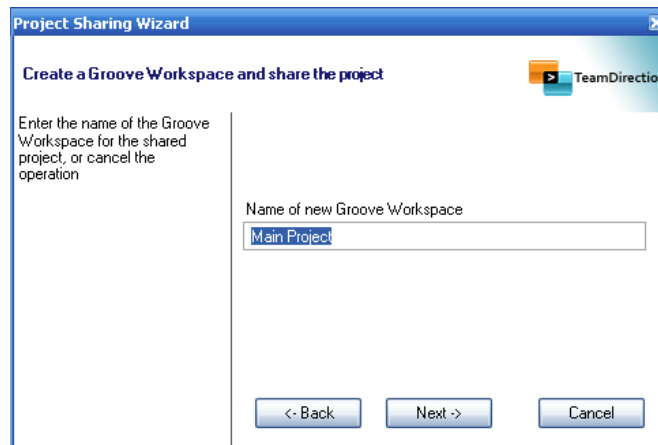
Share your project to a Groove 2007 workspace

To share a project to Groove 2007, first open the project and press the share button in the toolbar to start the share wizard. Select **Share project on Groove** and press the **Next** button.



Select **Share** from the IntelliGantt menu to start the Share wizard

In the next screen enter the name of the Groove workspace that the project will be shared on. Pressing **Next** will complete the share.

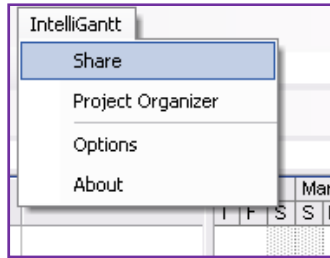


Enter the name of your new Groove 2007 workspace

To invite members to a project that is shared on Groove, you need to send them an invitation to the workspace.

Share your project to an Internet Workgroup

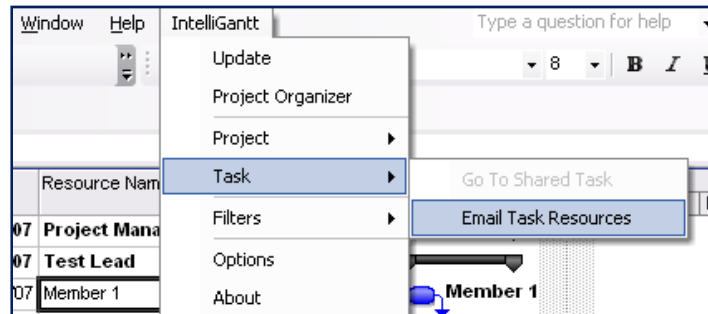
An Internet Workgroup allows you to share your projects without needing a 3rd party platform. All you need is an Internet connection and the email addresses of your other team members. If you plan on using Internet Workgroups to share your projects, all members of the team will need to have a copy of IntelliGantt.



Select **Share** from the IntelliGantt menu to start the Share wizard

Select **Share project on Internet Workgroup** and press the **Next** button.

To add a member to the Internet Workgroup, you only need to assign an email address to the resources that are assigned to tasks in the project. After you update the project, the member will be added to the workgroup. You can send an invitation to assigned members by selecting **Email Task Resources** from Task in the IntelliGantt menu.



Send an email invitation to the email of the resource assigned to the selected task

Joining an Existing IntelliGantt® Project

If someone else has created a project and invited you, you can join and work together on the same project using your own copy of IntelliGantt.

Join a project in SharePoint

If a project was shared to a SharePoint workspace that you are a member of, the project creator will need to send you a notification email. The notification email will contain a tdiconnect file that will have the same name as the project you want to join. Once you have received the email message you can join the project by double clicking on the attached tdiconnect file. You can also save the file to your computer and join later if you wish.

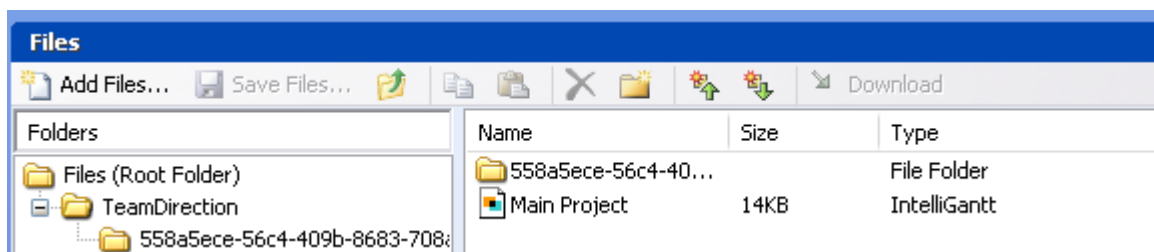


Open the tdiconnect file that is attached to your email invitation

If the project creator does not use Microsoft Outlook, then he will send you a link to the project. If this is the case, then you can join the project by opening the link in your browser.

Join a project in Groove 2007

In order to join a project that is shared to a Groove workspace you will need to accept an invitation to the workspace. Once you are a member of the workspace, go to the files tool in the workspace and select the **TeamDirection** folder in the left navigation pane. In that folder you can see a file with the same name as the project you want to join. Open the tdiconnect file to load the project into your copy of IntelliGantt.



Open the file in the TeamDirection folder that is the same name as the project to join your project shared to Groove

Join a project in an Internet Workgroup

If the project creator has shared the project to an Internet Workgroup, they will send you an notification email. The notification email will contain tdiconnect file that will have the same name as the project you want to join. Once you have received the email message you can join the project by double clicking on the attached tdiconnect file. You can also save the file to your computer and join later if you wish.



Open the tdiconnect file that is attached to your email invitation

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