

Star|System|Solutions

MS Project Client version 7.10

Documentation

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1 MS Project Client – User Documentation

1.1 Introduction

The Microsoft Project Client application supports three main functions:

- Resource Wizard
 - This function populates a Microsoft Project plan with resources from Star Projects. Also the rates of Star Projects resources already published into a Microsoft Project plan can be updated.
- Task Wizard
 - Pull function creates Star Projects tasks from a Microsoft Project plan.
 - Push function creates MS Project plan tasks and assignments from Star Tasks data
 - MS Project plans can be updated with actual qty and cost/charge amounts from Star Projects.
- Budget Wizard
 - This function creates Star Projects budget information from a given Microsoft Project plan.

1.2 Supported File Formats/Versions

Plans created in the Microsoft Project must be saved in one of the Microsoft Project formats.

MPP: Native MS Project File Type.
Project Server: SQL Server database tables created via MS project server installation

Older versions of the interface also supported a third connectivity method via ODBC. This required users to manually run a Microsoft supplied script to create SQL database tables and meant a different script was required for each version of MsProject. The ODBC method was developed and tested on project 98 and 2000 versions only and has now been discontinued. Using COM calls to access Microsoft data for the 2 formats above means those methods work for any version of MsProject PROVIDED Microsoft continue to support the use of the COM calls and haven't changed the way they work or the number of parameters required to use them.

At the time of updating this document, we identified an issue with MsProject 2007 when pushing tasks from Star to a project plan. The custom MsProject field used to store the task number which links the 2 systems is not being updated/retrieved correctly due to changes in the Microsoft workings. The push functionality is new to StarProjects v7 and please check with Star for updates before using this.

1.3 Creating a quick launch shortcut

The MSP Client application contains a quick launch feature enabling you to bypass the login screen with the settings normally used. (See: Creating a shortcut from my windows desktop to automatically login and select a wizard)

1.4 Main screen

The main screen of the MS Project Client application consists of three options: Resource Wizard, Budget Wizard and Task Wizard. Each option has a corresponding menu item that can be selected from the File menu. The Help About screen contains version information or the application and database.

1.5 Select Plan Name

Each of the wizards used in the application contain the same first screen, the select plan name screen. When the screen is first opened the MS Project Client application reads system settings to determine which options are to be enabled and sets the defaults of the screen. Also refer to the following settings in Options Explorer:

Interfaces, Modules, Microsoft Project	
Interfaces, MS Project, Allow MPP plans	
Interfaces, MS Project, Allow SQL plans	
Interfaces, MS Project, Default Plan Type	
Interfaces, MS Project, DSN Name	
Interfaces, MS Project, Field to hold actual amount	default = Cost1
Interfaces, MS Project, Field to hold actual qty	default = Duration1
Interfaces, MS Project, Field to hold PA Activity Code	default = Text15
Interfaces, MS Project, Field to hold PA Phase Code	default = Text11
Interfaces, MS Project, Field to hold PA Resource Code	default = Text1
Interfaces, MS Project, Field to hold PA Task Code	default = Text1
Interfaces, MS project, Field to hold specification	default = Text10
Interfaces, MS Project, Field to ignore Task Line for PA	default = Flag1
Interfaces, MS Project, Project Server URL	

1.5.1 File Type

Microsoft Project Files (*.mpp): Indicates that the plan to be used is a native file format of MS Project.

SQL Server (ODBC): Indicates that the plan to be used exists in a SQL database.

Project Server: Indicates that the plan to be used is setup as a Project Server MS Project.

1.5.2 URL, Username and Password

Contains the URL server name, login username and password for the selected Project Server plan name.

1.5.3 File Name

Contains the name of the plan name to be used. Plan names can be selected a number of ways.

Plan names can be typed in.

Select the plan name from the drop down list. (The plan names displayed will be in order of most recent used files of MS Project).

Double click, right click or press Ctrl-Z to select a plan name from an open file dialog or select a plan name from the SQL database.

1.6 The Resource Wizard

The resource wizard publishes Star Projects resources into an **existing plan**. Resource information published to MS Project includes resource description, code and cost and charge rates.

The **orientation** of the wizard is purely **one-way**, from **Star Projects to MS Project**.

It is important to note that if resources are published into the Microsoft Project plan using the system or project option that the rates for a resource might differ. This is because the selection criteria of the MS Project Client application in finding a rate differs between the two options. Please refer to System Resources and Project Resources for more information.

After the selected resources have been published into the MS Project plan, their cost and charge rates can be viewed by double clicking on the resource and selecting costs, Table A contains the charge rate of the resource and Table B contains the cost rate of the resource. The standard rate of the resource in the plan defaults to the charge rate.

See Tables views created by the MS Project Client Application in this document for more information.

1.6.1 System Resources

The list of selected resources will contain all system wide resources. Filter options include branch, department, resource, workgroups, global resources, non-global resources and both global and non-global resources. The cost and charge rates populated into the plan are based on the **resource code and resource class code** of the resource.

1.6.2 Project Resources

Only resources for a given project will be published into MS Project. Filter options include client, project and phase. The cost and charge rates populated into the plan are based on the **client code, project code, phase code, resource code and resource class code** of the resource.

1.6.3 Update Star Projects resource rates in plan

This option should be ticked if you wish cost and charge rates to be updated for Star Projects resources that already exist in the plan, therefore updating Cost Table A and Table B. If you want this function to be performed without adding any new resources to the plan the simply click on finish on the last screen of the wizard without adding any new Star Projects resources.

1.6.4 Hide existing Resources in plan

By selecting this option all resources from the plan will be hidden.

1.6.5 **Hide non Star Projects Resources**

By selecting this option all non- Star Projects resources from the plan will be hidden.

1.6.6 **Selecting Resources to include and exclude from the plan**

The buttons in the middle of the two grids move resources into and out of the plan. The top button adds one resource at a time to the plan, the second adds all resources to the plan, the third removes a resource one at a time from the plan and the last button removes all resources from the plan.

Existing resources from the plan cannot be removed from the plan via the MS Project Client application; this has to be done in MS Project.

Any existing Star Projects resources that already exist in the plan will not be shown in the Star Projects grid.

1.7 **The Task Wizard**

The **orientation** of the task wizard is **bi-directional**. Tasks can be created in StarProjects and pushed across into a selected plan, or vice-versa where tasks created in a plan can be pulled into StarProjects. In addition, plans can be updated with actual qty, cost amounts and other details from StarProjects

When creating Star Projects tasks from the Microsoft Project plan the phase code from the plan will be used only if it is valid for the selected client/project. The phase code can be stored in the plan at any level and the phase code respects the task hierarchy for example:

```
Task 1                PHASE CODE 01
  Task 1.1
  Task 1.2
    Task 1.2.1
    Task 1.2.2        PHASE CODE 02
  Task 1.3
```

Therefore when tasks are imported they will look as follows:

```
Task 1                PHASE CODE 01
  Task 1.1            PHASE CODE 01  <-The phase code comes from Task 1
  Task 1.2            PHASE CODE 01  <-The phase code comes from Task 1
    Task 1.2.1        PHASE CODE 01  <-The phase code comes from Task 1
    Task 1.2.2        PHASE CODE 02
  Task 1.3            PHASE CODE 01  <-The phase code comes from Task 1
```

The MS Project Client application searches for a phase code using the following hierarchy; Task assignment -> Task -> Summary Task -> Summary Task -> Summary Task etc, if no valid phase code has been found then use the phase code from the wizard if one has been specified.

The same rule applies for activities when creating StarProject tasks from Microsoft Project plans.

NOTE: when pushing tasks across to MS project, phase and activity codes will go across at the assignment level if the assignment exists. If a task was pulled from MS project where the phase or activity is specified at the task level, the code will not be updated at task level when being pushed back to the plan.

The task 'specification' field is always pushed and pulled from the plan's task (and not the assignment).

1.7.1 **Select Project**

Enter the client code, project code and/or phase code that newly created Star Projects tasks will be associated with.

1.7.2 **Copy plan tasks to Star Projects**

This option indicates that you want to create Star Projects tasks from an existing Microsoft Project plan.

1.7.3 **Update plan Tasks with actuals from Star Projects**

This option indicates that you want to update the plan with actual qty and cost amounts from Star Projects posted timesheets.

1.7.4 **Current Amounts**

Tasks created in Star Projects from the plan will contain current information and not baseline information.

(See: MS Project help for more information on baseline v actual)

1.7.5 Baseline Amounts

Tasks created in Star Projects from the plan will contain baseline information and not current information.

(See: MS Project help for more information on baseline v actual)

1.7.6 Milestone Tasks

Milestone tasks can be included or excluded when tasks are imported into Star Projects.

1.7.7 Include unassigned tasks

This option indicates if unassigned tasks are to be included when the tasks are imported into Star Projects from the plan. This option simply defaults the Include option in the select tasks to import screen.

1.7.8 Selecting tasks to import into Star Projects

This screen is the final screen of the wizard; it contains all of the tasks about to be imported into Star Projects. The Include column can be turned off or on. Any task without a tick in the include column will not be imported in Star Projects. If a task is imported into Star Projects and the task already exists then the task information in Star Projects is updated.

1.8 The Budget Wizard

The budget wizard imports plan budget information into Star Projects. Either actual or baseline budget information can be imported.

The **orientation** of the wizard is purely **one-way**, from **MS Project to Star Projects**.

The exclude option on the plan will be used in determining if budget information for a task is to be included. If the exclude flag is set to YES then all budget information for the task (including resource assignment budget information) will be ignored. This option is ignored at the summary task level as the Microsoft Project Client application ignores budget information at the summary task level by default.

1.8.1 Select Star Projects Budget to update

Enter the client, project, phase and budget code to indicate which Star Projects budget the created budget lines will be associated with.

1.8.2 Delete existing Timesheet lines

If this option is ticked then all existing timesheet budget information for the selected budget will be deleted and replaced with the budget information created by the MS Project Client application.

1.8.3 Ignore Resource details

Budget information will be rolled up into one line as resource information is ignored.

1.8.4 Split Budget by Resource

Budget information will be rolled up by resource and resource class.

1.8.5 Split Budget by Resource Class

Budget information will be rolled up by resource class.

1.8.6 Split budget by task

Budget information will be gathered at the lowest level; resource assignment. Therefore no budget information will be rolled up. The resource class is looked up from the resource and the task description comes through as the budget line description when imported into Star Projects.

1.8.7 Copy plan dates to Star Projects Budget dates

If this option is selected then the start and end dates of the resource will be included in budget information created from the MS Project plan.

If baseline is selected then the dates are based on the baseline start and end dates. Otherwise the actual start and end dates will be used.

1.8.8 Leave Star Projects dates blank

The budget lines created from the MS Project plan will not include the start and end dates of the resource tasks.

1.8.9 Amounts – Current

If this option is selected the qty of work done, start and end dates of the tasks will be taken from the actual figures and not the baseline figures.

1.8.10 Amounts – Baseline

Any budget information created from the MS Project plan will contain only baseline information.

1.8.11 The budget grid

The budget grid simply displays the budget information about to be imported into Star Projects.

1.9 Table views created by the MS Project Client Application

Each wizard creates new tables or views in the selected plan. The purpose of these views is to display the Microsoft Project plan in context of Star Projects. Therefore information such as resource code, task ids and activity can be viewed. These views display the key link fields used as a cross reference to Star Projects.

These views can be accessed by selecting resource usage, task usage or Gantt chart and then by selecting from the menu, view -> table.

The views created by the wizards are;

1.9.1 Star Project Tasks Actuals

This view compares Star Projects actual duration and cost versus Microsoft Project duration and cost.

1.9.2 Star Project Tasks

Microsoft Project tasks are displayed with extra Star Projects columns; phase code, activity code, exclude, Star Projects task code, WBS Code, Star Projects actual duration and Star Projects actual cost.

1.9.3 Star Projects Gantt Chart

This view extends the Gantt chart view of Microsoft Project with rolled up task code, duration and cost information.

1.9.4 Star Projects Resources

This view displays basic resource information such as Star Projects resource code, resource name.

2 MS Project Client – Technical Documentation

2.1 Creating a MS Project SQL database - Introduction

The Microsoft Project Client application installation contains three SQL script files:

```
Installation Directory\MS Project 98\SQLTABLE.SQL  
Installation Directory\MS Project 2000\SQLTABS.SQL  
Installation Directory\Sy_Permit_MsProject_sp.sql
```

These scripts are to be only used if you intend to use Microsoft Project in a SQL Server environment.

If any problems occur during this process please contact your database administrator as SQL Server security/login issues may need to be addressed. If at any stage this process fails, delete the newly created database and start from step 1.

2.1.1 Creating a MS Project 98 database.

Please note the scripts need only to be run once.

- 1). Create a new database (typically through SQL Enterprise) with a meaningful name for example MS_Project_Plans.
- 2). Open Query Analyser or another application that will run the scripts needed to create the Microsoft Project database.
- 3). Ensure that you have connected to the **correct server** and the **correct database**, for example MS_Project_Plans.
- 4). Open the SQL script "Installation Directory\MS Project 98\SQLTABLE.SQL". This script was provided by Microsoft and therefore should not require any changes. Please ensure that you have opened the correct **version** of the script; the **MS Project 98 directory** contains the script needed for Microsoft Project 98 and the **MS Project 2000 directory** contains the script needed for Microsoft Project 2000.
- 5). Run the script.
- 6). Open the script "Installation Directory\Sy_Permit_MsProject_sp.sql". This script creates the necessary logon and user required by the Microsoft Project Client application.
- 7). Run the script.
- 8). See step 2.2
- 9). See step 2.3
- 10). See step 2.3.1

2.1.2 Creating a MS Project 2000 database.

Please note the scripts need only to be run once.

- 1). Create a new database (typically through SQL Enterprise) with a meaningful name for example MS_Project_Plans.
- 2). Open Query Analyser or another application that will run the scripts needed to create the Microsoft Project database.
- 3). Ensure that you have connected to the **correct server** and the **correct database**, for example MS_Project_Plans.
- 4). Open the SQL script "Installation Directory\MS Project 2000\SQLTABS.SQL". This script was provided by Microsoft and therefore should not require any changes. Please ensure that you have opened the correct **version** of the script; the **MS Project 2000 directory** contains the script needed for Microsoft Project 2000 and the **MS Project 98 directory** contains the script needed for Microsoft Project 98.
- 5). Perform a search and replace on Projmanager1 and replace it with a table owner that is valid for the newly created database such as dbo.

- 6). Run the script.
- 7). Open the script "Installation Directory\Sy_Permit_MsProject_sp.sql". This script creates the necessary logon and user required by the Microsoft Project Client application.
- 8). Run the script.
- 9). See step 2.2
- 10). See step 2.3
- 11). See step 2.3.1

2.2 Creating a system DSN to connect to the Microsoft Project database

Please note that every computer that will connect to Microsoft Project via an ODBC requires a system DSN connection to be configured.

- 1). After the appropriate scripts have been run, load the Data Sources (ODBC) configuration utility. In a Windows 2000 environment the utility can be found in Settings, Control Panel, Administrative Tools, and Data Sources (ODBC).
- 2). Select SYSTEM DSN.
- 3). Click on Add, you are now prompted with a Create New Data Source screen, scroll down until you find SQL Server. Click on Finish.
- 4). Enter the name of the Data Source, for simplicity sake type in the same name as the database. E.g. MS_Project_Plans.
- 5). Enter the description of the data source, E.g. MS_Project_Plans.
- 6). Enter the SQL Server name.
- 7). Click Next.
- 8). There are two authentications methods
 - Windows authentication
 - SQL Server authentication

Your database administrator should make this selection as a login and user might need to be created in SQL Server. If SQL Server authentication is checked then please enter your Login ID and password.

Click Next.

- 9). Click on 'Change the default database to:' to enable the selection list. Select the database you created from the list. E.g. MS_Project_Plans
- 10) Click Next, Finish then Test Data source. If test completed successfully appears then the ODBC has been created successfully, otherwise repeat the steps again or contact your database administrator.

2.3 Configuring Star Projects

Load the name and options screen in Star Projects. Select 'Microsoft Project' to enable the interface.

2.3.1 Using an ODBC – System DSN

After the scripts have been run and a system DSN created, the MS Project link needs to be configured in Star Projects.

Click on the 'MS Project' tab in the name and options screen, enter the name of the System DSN that was created previously and click on Test MS Project Link. Star Projects will display a prompt indicating is the integration has been setup correctly or not.

The 'Test MS Project Link' connects to the database via the system DSN and also sends some test SQL to ensure that the system DSN is not only connected to a database but also to a database of the **correct structure**. (See Test SQL)

2.3.2 Options Explorer

(See: Interfaces, MS Project; Options Explorer help text in Star Projects).

2.4 Creating a shortcut from my desktop to automatically login.

It is possible to create a desktop shortcut for the MSP Client application that automatically logs into the database and defaults to wizard or defaults to the main screen.

Create a shortcut on the Windows desktop, right click and select properties. In shortcut, target, add the following to the end of the target information, replacing MY_SERVER, MY_DATABASE, MY_USER_ID, and MY_PASSWORD:

2.4.1 Using SQL Server authentication

Creating a shortcut to load the main screen:

```
NT_AUTH="0" SRV="MY_SERVER" DB="MY_DATABASE" UID="MY_USER_ID" PWD="MY_PASSWORD"
```

Creating a shortcut to load the resource screen:

```
NT_AUTH="0" SRV="MY_SERVER" DB="MY_DATABASE" UID="MY_USER_ID" PWD="MY_PASSWORD"  
DEF="RESOURCES"
```

Creating a shortcut to load the task screen

```
NT_AUTH="0" SRV="MY_SERVER" DB="MY_DATABASE" UID="MY_USER_ID" PWD="MY_PASSWORD"  
DEF="TASKS"
```

Creating a shortcut to load the budget screen

```
NT_AUTH="0" SRV="MY_SERVER" DB="MY_DATABASE" UID="MY_USER_ID" PWD="MY_PASSWORD"  
DEF="BUDGETS"
```

2.4.2 Using Windows NT authentication

NT authentication simply requires no user id or password.

Creating a shortcut to load the main screen:

```
NT_AUTH="1" SRV="MY_SERVER" DB="MY_DATABASE" UID="" PWD=""
```

Creating a shortcut to load the resource screen:

```
NT_AUTH="1" SRV="MY_SERVER" DB="MY_DATABASE" UID="" PWD="" DEF="RESOURCES"
```

Creating a shortcut to load the task screen

```
NT_AUTH="1" SRV="MY_SERVER" DB="MY_DATABASE" UID="" PWD="" DEF="TASKS"
```

Creating a shortcut to load the budget screen

```
NT_AUTH="1" SRV="MY_SERVER" DB="MY_DATABASE" UID="" PWD="" DEF="BUDGETS"
```

3 MS Project Client – Troubleshooting

3.1 I can't access the MSP Client options in Star Projects

Ensure that the MSP interface has been enabled in the name and option screen.
(See: Configuring Star Projects) If the menu items are disabled then close Star Projects and re-open.

3.2 'Test MS Project Link' informs me that the 'Connection Failed'

- 1). Check the spelling of DSN name to ensure it is correct.
- 2). Check the system DSN to ensure that it has been configured correctly.
(See: Creating a system DSN to connect to the Microsoft Project database)
- 3). Ensure that the appropriated scripts have been run.
(See: Creating a MS Project SQL database – Introduction; Creating a MS Project SQL database)
- 4). Ensure that the correct version of scripts were run.
(See: Creating a MS Project SQL database)

3.3 Problems running SOLTABS.SQL script, I can't create the MSP 2000 SQL Database

Ensure that you have performed a search and replace on **Projmanager1** and replaced it with a valid table owner such as **dbo**. (See: Creating a MS Project SQL database. Point 5)

3.4 Why doesn't the file type in the wizard default to a valid file type

If this is the case then the system setting Interfaces, MS Project, Default Plan Type contains an invalid value. Either MPP or SQL should be used. See Interfaces, MS Project, Default Plan Type; Options Explorer help text.

3.5 Budget Wizard – when splitting budgets by task, why are some plan tasks being excluded?

Only tasks with a 'Work' value > 0 are transferred to StarProjects.

3.6 Task Wizard – why are start/end dates different when pushing tasks across to the plan?

This is due to the way MS Project works and the rules it imposes on data being entered. MS project has inbuilt scheduling logic to take account of working calendars of resources, autolinked tasks, constraint dates and so on that is factored into the plan. There may be cases where dates specified in StarProjects do not correspond to the dates appearing in MS Project plans due to this inbuilt scheduling logic.

3.7 Task Wizard – why does the % complete value push across to the plan as zero?

This is due to the way MS Project works and the rules it imposes on data being entered. If the Hours specified on a task is 0 (work), then actual work (work x % work complete) will be 0. In this scenario the plan automatically sets the % work complete to 0 when pushing tasks across to the plan.

3.8 Task Wizard – why is the WBS code blank in Star when pulling tasks across from the plan?

The WBS code must exist in Star when pulling tasks across. If an incoming WBS code does not match then the code will be set to blank rather than import a code that doesn't exist in StarProjects.

4 MS Project Client – Questions

4.1 Can I run two or more versions of Microsoft Project?

This is not recommended, we have experienced problems where Microsoft Project 98 was installed onto a machine which already had Microsoft Project 2000 installed.

The preferred upgrade path is to uninstall MS Project 98 and install MS Project 2000.

4.2 What if my network domain changes name?

If your domain name has changed then it is advisable to uninstall Microsoft Project and Re-Install.

5 Other Information

5.1 Interface – Differences between 6.30 and 7.05

- Resource Wizard**
 In the v6.30 version, when selecting Project Resources in the wizard, the interface behaviour is to always return the list of resources restricted to that project. In the later series, the Options Explorer setting is looked up to determine if this restriction should apply or not. Validation Rules → Common → Enforce Resource Restrictions. Note: when selecting system resources the setting to control inclusion or exclusion of closed resources is respected in both versions. Validation Rules → Common → Allow Closed Resource.
- Task Wizard**
 A 'Milestone' flag exists on tasks in the later series of StarProjects. The 7.05 interface supports the pushing and pulling of the milestone status on tasks. In the 6.30 series, the status cannot be synchronized between the two systems as the field does not exist in StarProjects, however milestone tasks being pulled from a plan into StarProjects can be excluded.

5.2 Task Wizard – tabular summary of selected fields

Section 1.8 explains the hierarchy used to pull phases across to StarProjects. The following table summarises a high level view of that section for selected fields of interest.

Field	MS project summary task	MS project task	MS project task assignment		StarProjects task
Phase code	•			→	•
Phase code		•		→	•
Phase code			•	→	•
Activity code	•			→	•
Activity code		•		→	•
Activity code			•	→	•
Specification		•		→	•
WBS code	•			→	•
WBS code		•		→	•
WBS code			•	→	•
Phase code			•	←	•
Phase code		•		←	• no resource specified
Activity code			•	←	•
Activity code		•		←	• no resource specified
Specification		•		←	• if task has resource