

Star|System|Solutions

Star Projects MS Project Server Integration

Integration Guide
Additional Information

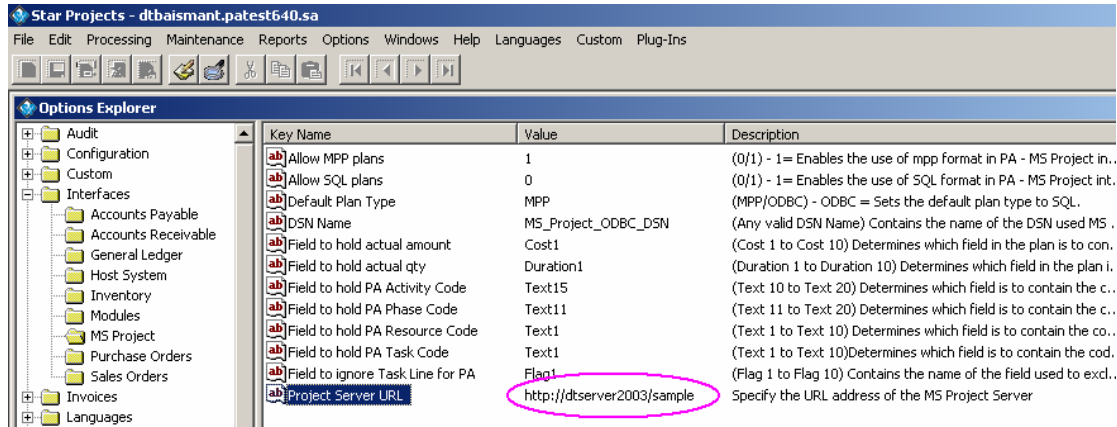
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StarProjects Wizards

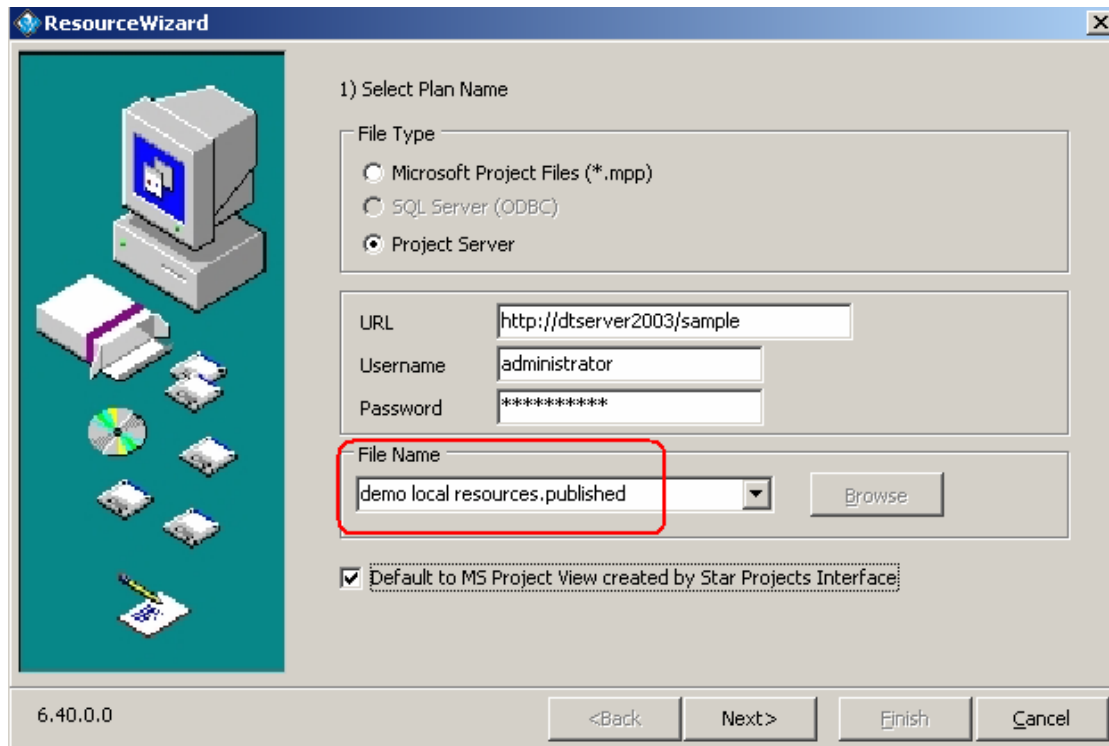
General

The URL containing the address of the Project Server database is stored in a system setting. The first screen of each wizard defaults the URL to this value.



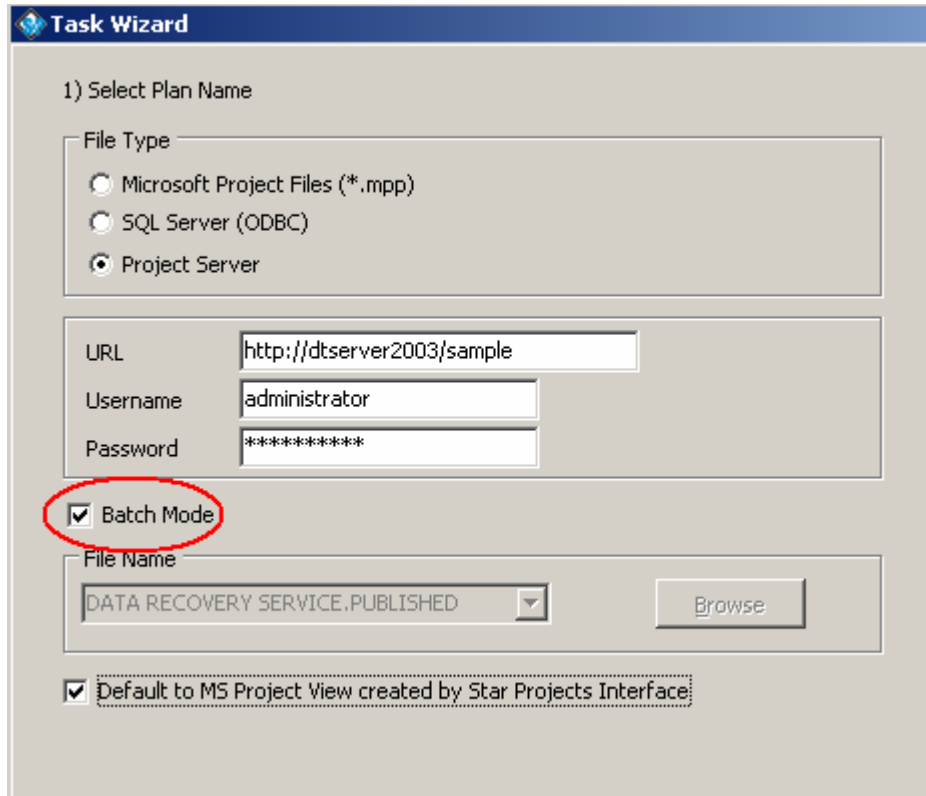
A number of other Options Explorer settings shown in the picture above are also used to hold linkage details between Project Server and StarProjects.

The name of the Project Server plan to be updated must be specified in full including the version suffix. At the time of writing of this document, the Browse button is disabled when selecting a plan name. A future release will have the Browse button enabled and the ability to select a plan from the File Name drop down list.



Batch Mode option on Budget & Task Wizards

In the Budget and Task Wizards, a specific plan name can be used to exchange data between that plan and StarProjects. Alternatively, the *Batch Mode* checkbox can be selected to present the user with a list of plans that have already been associated with a project so that one or more plans/projects can be processed in the same session.



The screenshot shows the 'Task Wizard' dialog box with the following fields and options:

- 1) Select Plan Name**
- File Type:** Radio buttons for 'Microsoft Project Files (*.mpp)', 'SQL Server (ODBC)', and 'Project Server' (selected).
- URL:** Text box containing 'http://dtserver2003/sample'.
- Username:** Text box containing 'administrator'.
- Password:** Text box containing '*****'.
- Batch Mode:** A checked checkbox, circled in red.
- File Name:** A dropdown menu showing 'DATA RECOVERY SERVICE.PUBLISHED' and a 'Browse' button.
- Default to MS Project View created by Star Projects Interface:** A checked checkbox.

A separate document called *StarProjects_MS_Project_Interface.pdf* is available which describes the wizards in more detail. The wizards are used to keep data in sync between a specific project and a corresponding Ms Project plan.

Architecture

Ms Project is actually divided into two parts.

The **COM Server** which is the heart of MsProject. It contains all the business rules and attributes needed to create and maintain a plan.

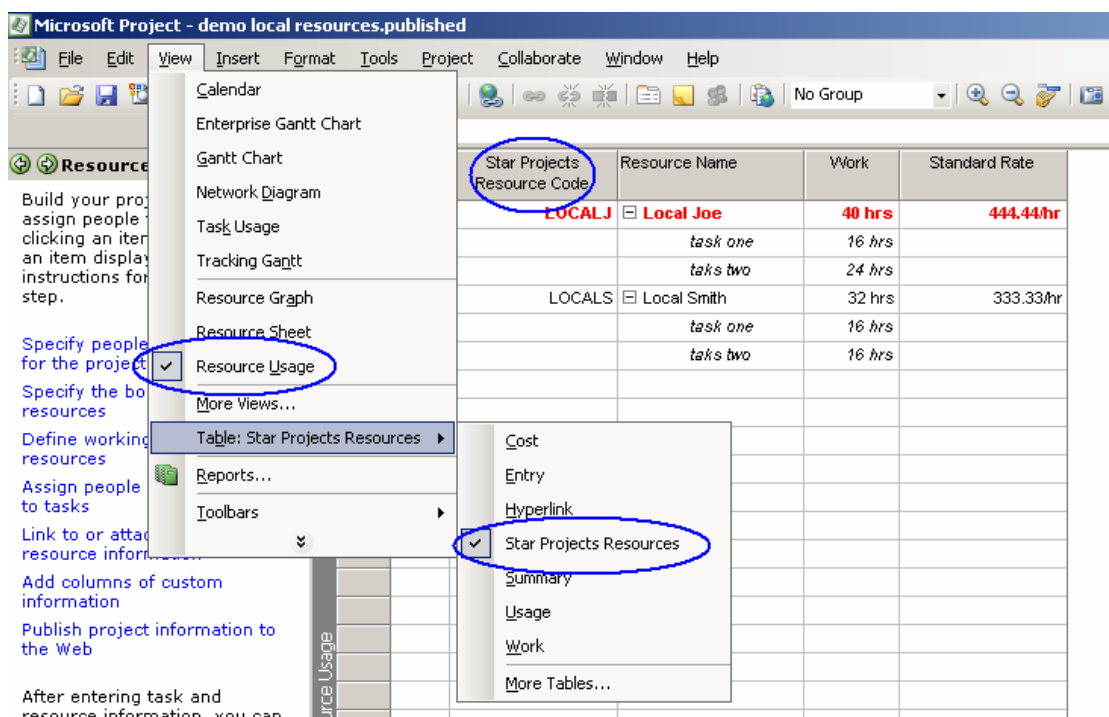
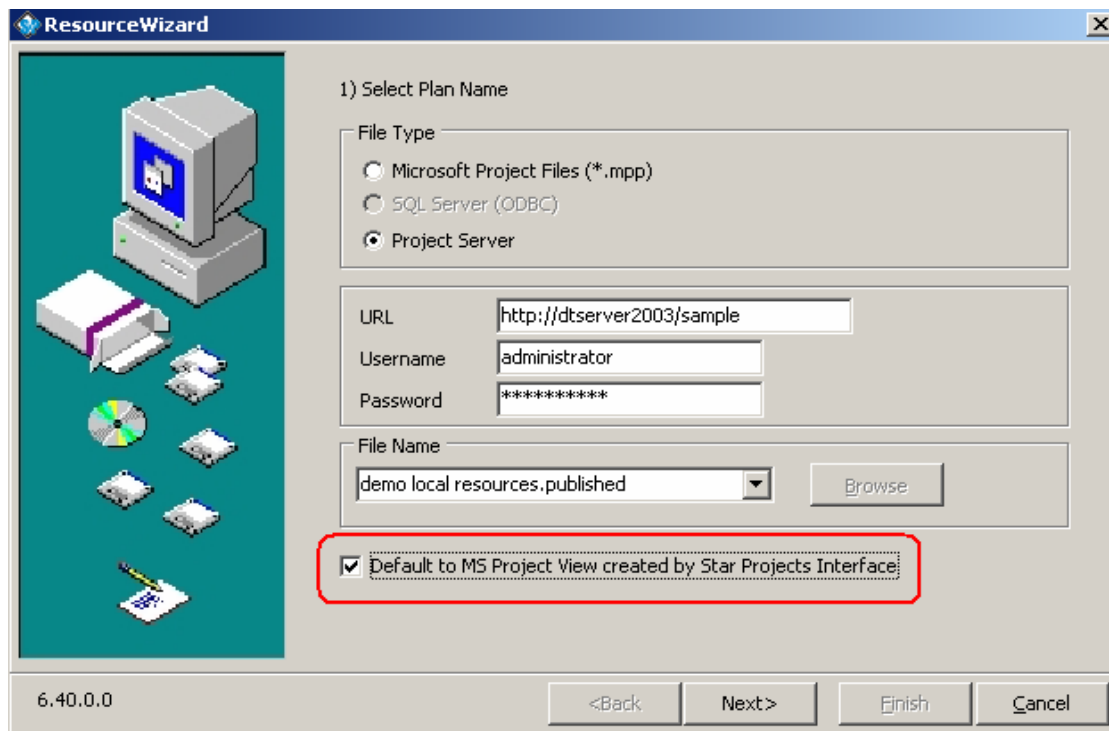
The **user interface** which is what the user typically sees as MsProject (WinProj.exe). The user interface communicates to the COM server to create, retrieve, modify plans etc. All communication and work is performed via the COM server.

The StarProjects Wizards are just a different user interface to the COM server. Interaction to the Project Server database occurs and the results of the interaction displayed by launching MsProject (WinProj.exe) and 'repainting' the screens in response to changes/messages from the COM server.

Resource Wizard

The data link for between ProjectServer and StarProjects for a resource is a configurable setting in Options Explorer. The default setting is Text1 which can be changed if it is already being used for some other purpose in MsProject.

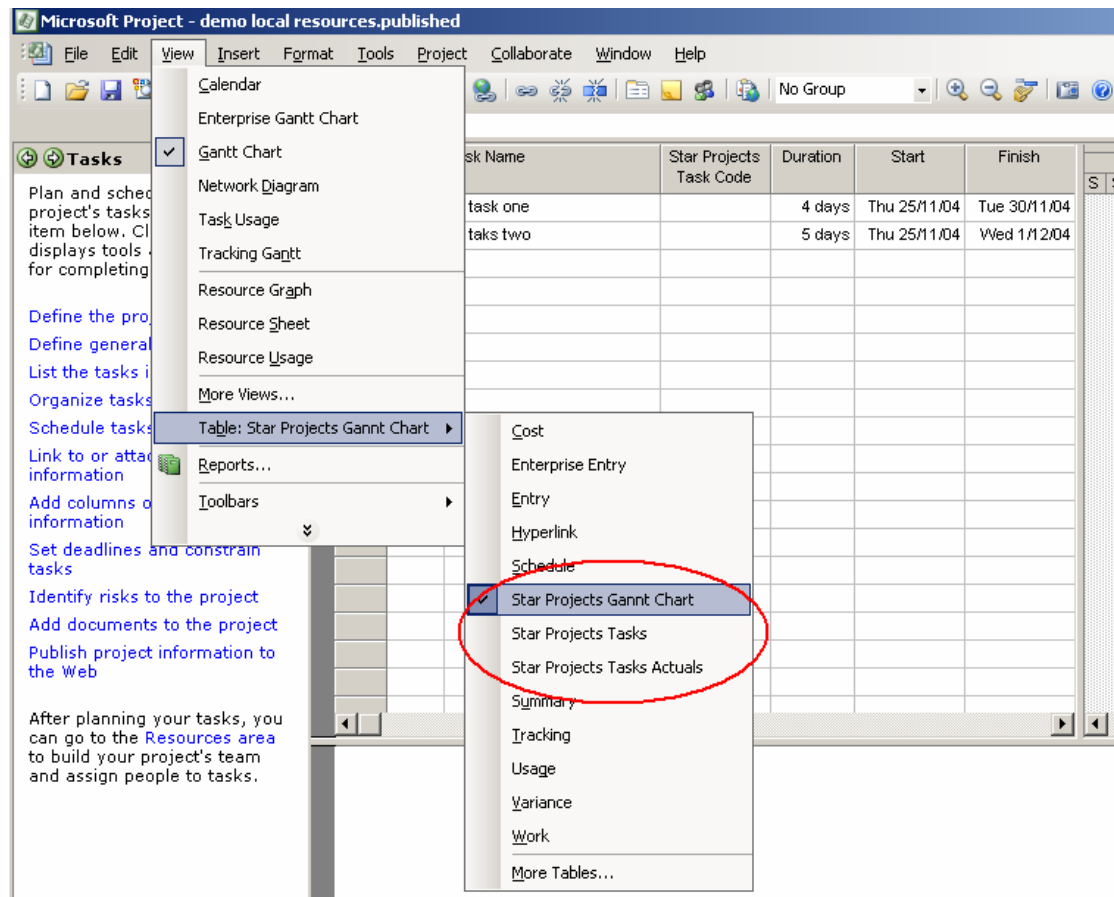
When running the resource wizard, there is an option to default to the MsProject view created by the StarProjects interface. Selecting this creates a Star Projects Resources 'table' which exposes the Text link with column title "Star Projects Resource Code".



Budget & Task Wizards

The data link for between ProjectServer and StarProjects for activity and phase codes are configurable settings in Options Explorer. The default settings are Text11 for Phase code and Text15 for Activity Code. These default settings can be changed if they are already being used for some other purpose in MsProject..

When running the budget wizard or task wizard, there is an option to default to the MsProject view created by the StarProjects interface. Selecting this creates 3 'tables' for viewing the link data. These are shown in the picture below:



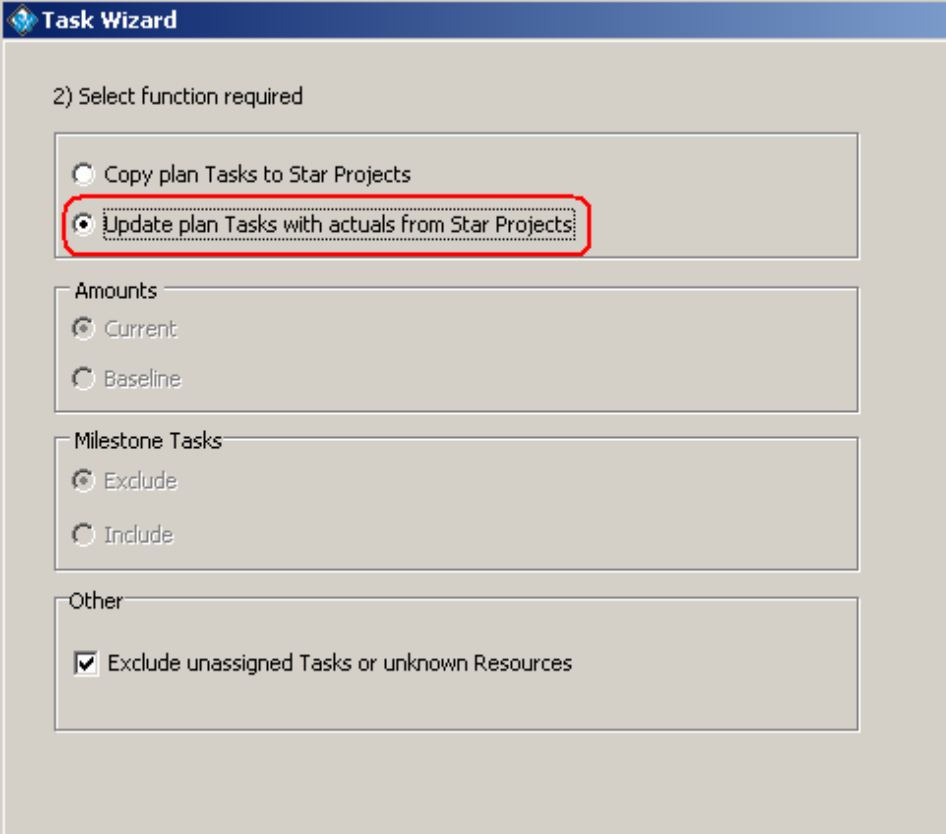
Columns for activity code and phase code are exposed to enable users to manually key in codes that will be passed across to StarProjects when the budget or task data is imported.

Project Web Access

Ensuring % work complete and actual dates flow from StarProjects into a Plan

If the Task Wizard will be used to update actuals back into the Plan, then changes to Tracking settings and Server configuration will most likely need to be changed. The changes allow the integration code to set the % work complete, Actual Start and Actual Finish dates on the task assignments which would otherwise be over-ridden by MS Projects' own processing calculations / rules.

The screen shot below shows the Star Task Wizard option used to update the actuals back into the Ms Project Plan.

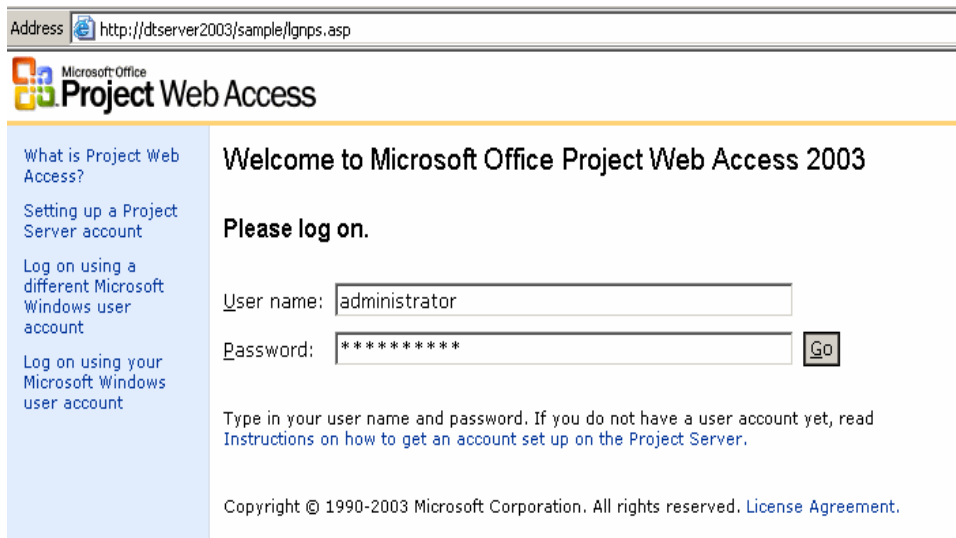


The screenshot shows a dialog box titled "Task Wizard" with a blue header. The main content area is titled "2) Select function required" and contains four sections of options:

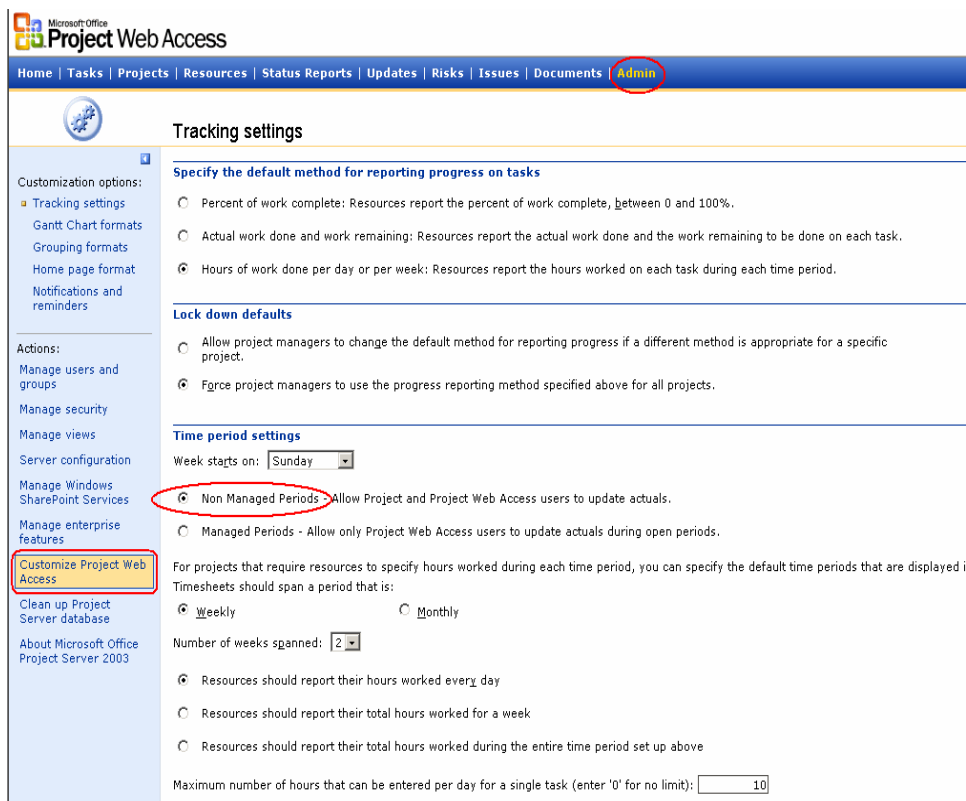
- Function Selection:** Two radio button options. The first is "Copy plan Tasks to Star Projects" (unselected). The second is "Update plan Tasks with actuals from Star Projects:" (selected and highlighted with a red rectangular box).
- Amounts:** Two radio button options. "Current" is selected, and "Baseline" is unselected.
- Milestone Tasks:** Two radio button options. "Exclude" is selected, and "Include" is unselected.
- Other:** A checked checkbox option labeled "Exclude unassigned Tasks or unknown Resources".

Tracking Settings – Select Non Managed Periods option

- 1) Log onto Project Web Access as a user who has administrator privilege:



- 2) In the *Time period settings* section, select the Non Managed periods radio group option and save the setting.



Server configuration – Select Deny on Timesheet approval

In the *Tasks* section, select the *Deny* checkbox option for Approve Timesheets for Resources and Timesheet Approval and save the settings.

The screenshot shows the Microsoft Project Web Access Admin interface. The 'Admin' link in the top navigation bar is circled in red. On the left sidebar, 'Server configuration' is highlighted with a red box. The main content area is titled 'Server configuration' and contains the following options:

- Specify the mode used to run Microsoft Project Server
 - Enable enterprise features.
 - Enable only non-enterprise features
- Allow master projects to be saved to Microsoft Project Server
- Allow master projects to be published to Microsoft Project Server.
- Allow projects to use local base calendars.
- Enforce single currency as specified in the enterprise global template.
- Allow only enterprise projects to be published to this server

A note at the bottom states: 'The current Active Directory group has never been synchronized with the Enterprise Resource Pool.'

Select the features that you want to make available to users in Project Web Access

Name	Feature	Allow	Deny
Account Creation		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Admin		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Collaboration		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Enterprise Portfolio Management		<input checked="" type="checkbox"/>	<input type="checkbox"/>
General		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Status Reports		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Tasks		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>
Create Administrative Projects	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Approve Timesheets for Resources	Tasks	<input type="checkbox"/>	<input checked="" type="checkbox"/>
View Timesheet	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Hide Task from Timesheet	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Create New Task or Assignment	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Change Work Days	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
New Project Task	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Timesheet Approval	Tasks	<input type="checkbox"/>	<input checked="" type="checkbox"/>
New Task Assignment	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
Delegate Task	Tasks	<input checked="" type="checkbox"/>	<input type="checkbox"/>
To-Do List		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Transactions		<input checked="" type="checkbox"/>	<input type="checkbox"/>
Views		<input checked="" type="checkbox"/>	<input type="checkbox"/>

Local Resources

A non-enterprise resource is a 'local resource' that is not shared with other project managers. Local resources are associated with a plan and are denoted with a different symbol in the Resource Sheet in Microsoft Professional. Local resources do not appear in the Resource Center in Project Web Access.

The StarProjects Resource Wizard can be used to publish local resources into a plan. The wizard will insert the resource if it is not already there, and can also be used to update the existing resource details such as charge and cost rates which appear in the Cost rates table of the plan in Resource Information.

Enterprise Resources

The following paragraph is a direct quotation from the Microsoft Project help text that explains what enterprise resources are.

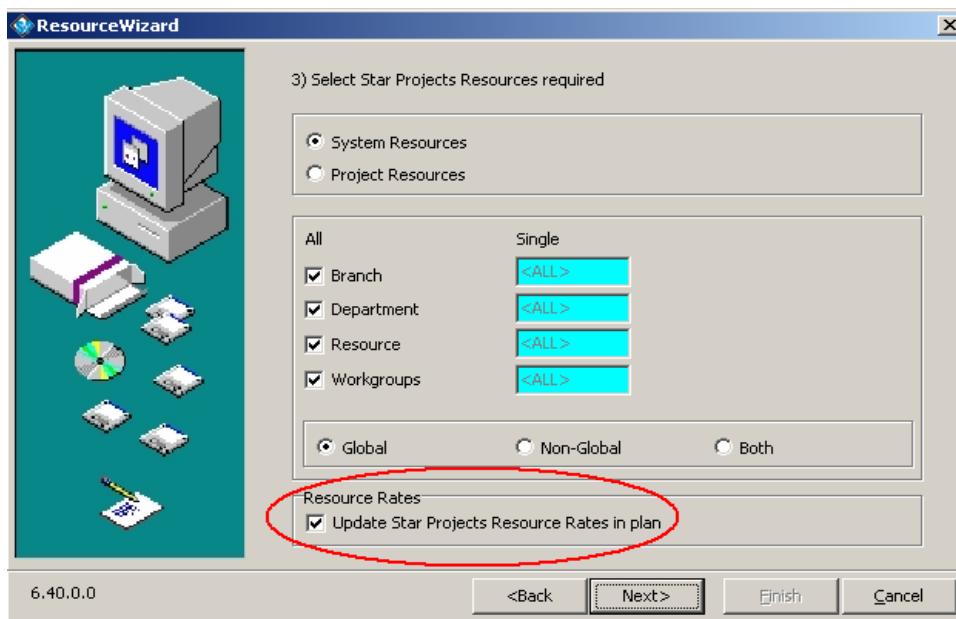
*In Microsoft Office Project 2003, you can add resources to the list of enterprise resources (Resources that are part of an organization's entire list of resources. Enterprise resources can be shared across projects.) by adding them directly from a project or by using a wizard. A resource needs to be added to your project before you can add the resource to the enterprise resource pool. **Note** You must have appropriate permissions to add resources to the enterprise resource pool.*

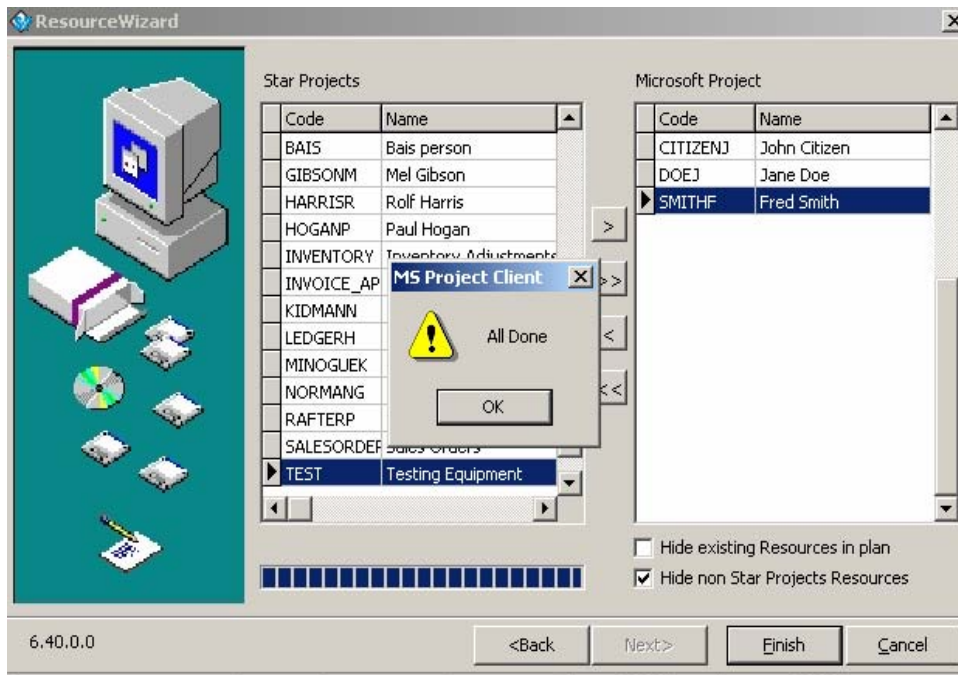
How to publish Star Resources as Enterprise resources in Project Server that do not already exist in Project Server

- 3) Using Project Professional, create a new plan and save it as StarProjects Resources.Published
- 4) Using the Resource Wizard from StarProjects, select the group of resources that need to make their way to the pool. As the pool will service a number of different plans, transferring all global system resources across is the most likely selection option instead of a specific project.

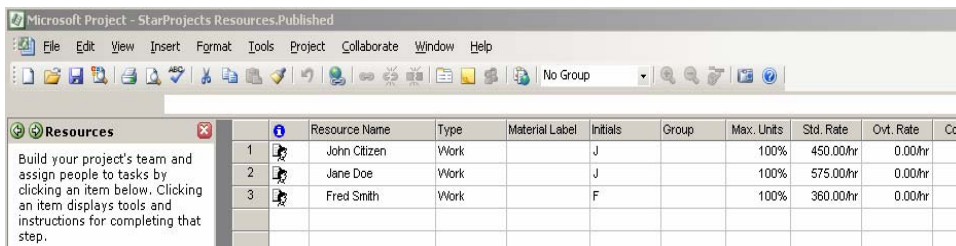
Complete the wizard screens which will launch Project Professional and automatically display the StarProjects Resources.Published plan.

Pay special attention to the “Update Star Projects Resource Rates in plan” checkbox. If the option is ticked, then the charge and cost rates held in StarProjects will come across with the resource into the plan, which will then flow into the pool when it is updated in the next step.

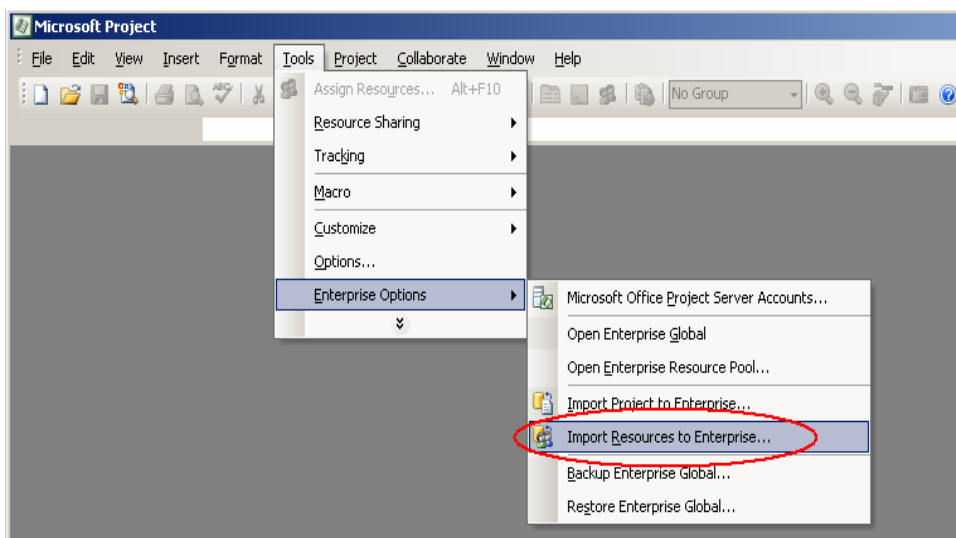


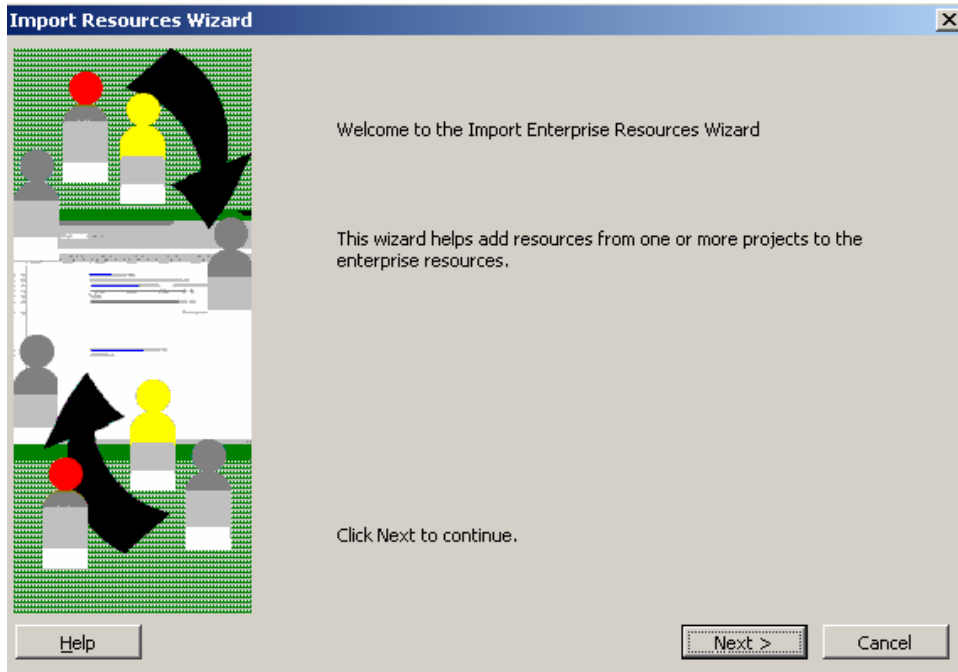


- 5) In the StarProjects Resources.Published plan, switch to the Resource Sheet view screen to see the resources that have been selected. After viewing the new resources, save and close the plan but stay in Project Professional.



- 6) To transfer the resources from the plan into the Enterprise Pool, use the Import Resources Wizard that MS Project provides.

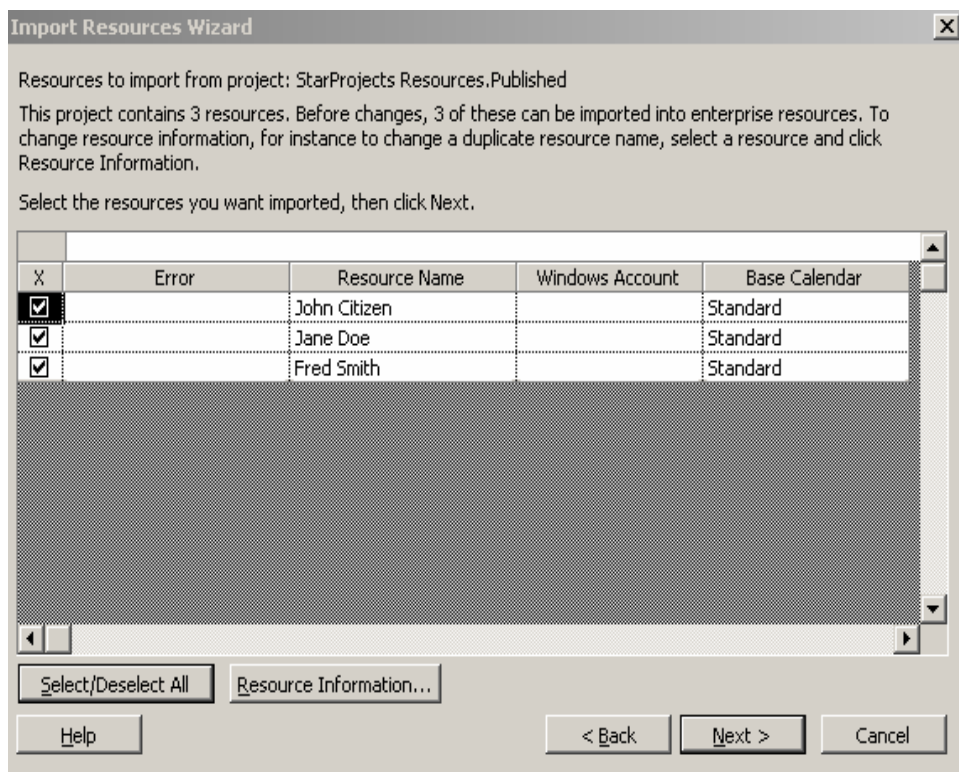
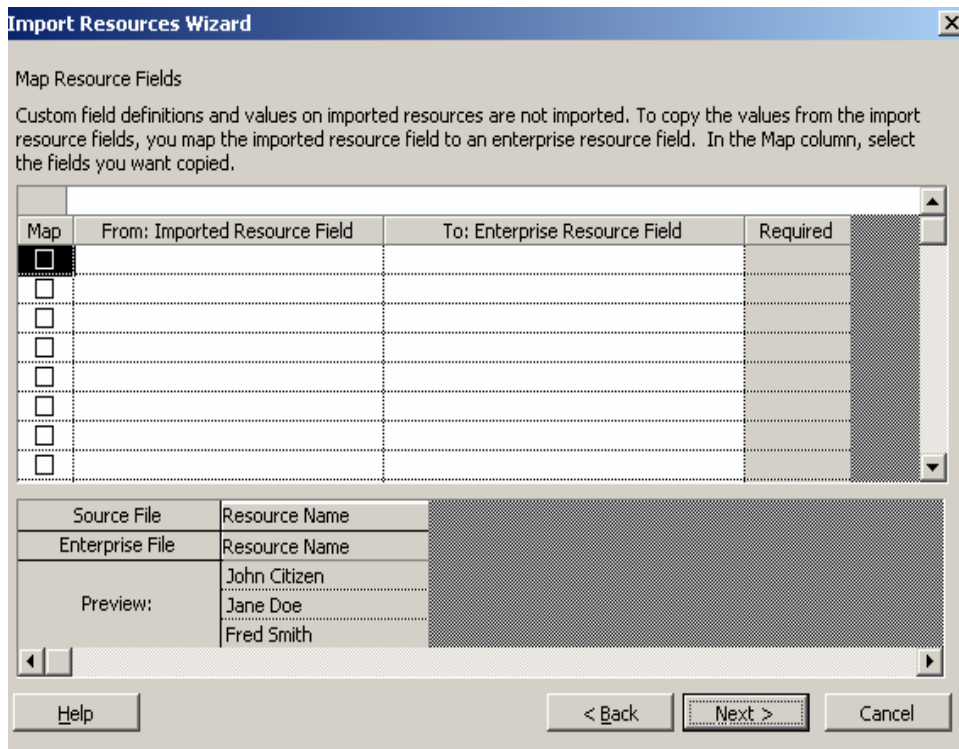


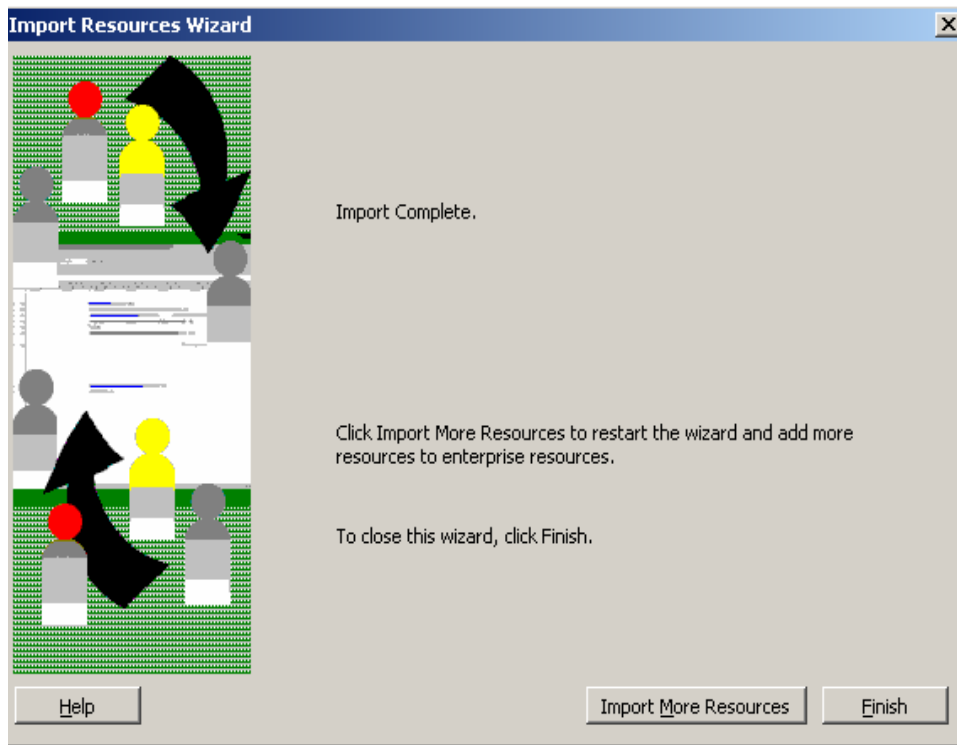


Open from Microsoft Office Project Server

Group By:

Name	Version	Checked Out?	Checked Out By
ellie 2 project	Published	No	
ellie project	Published	No	
Integration with Accounting	Published	No	
ISO Certification Tracking System	Published	No	
Malaysian Admin Project	Published	No	
mick	Published	No	
MickTest	Published	No	
MRP Deployment	Published	No	
MRP Deployment	Target	No	
MS Office Project 2003 Implementation	Published	No	
Office XP Deployment	Published	No	
Office XP Deployment	Target	No	
ResourcesFromPool	Published	No	
StarProjects Resources	Published	No	
Storage Services Business	Published	No	

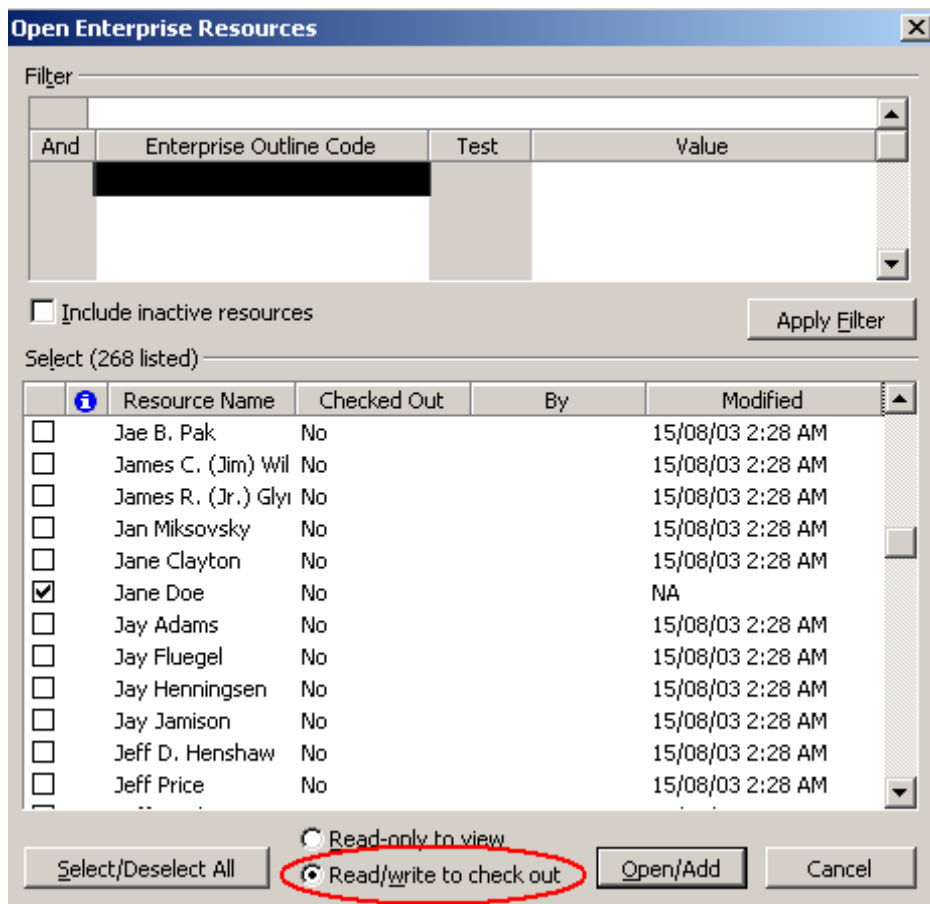
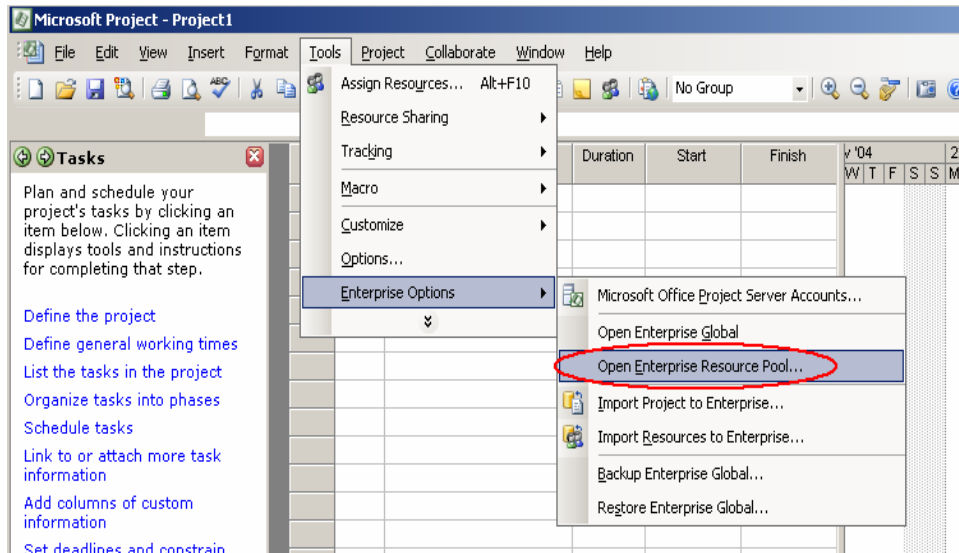




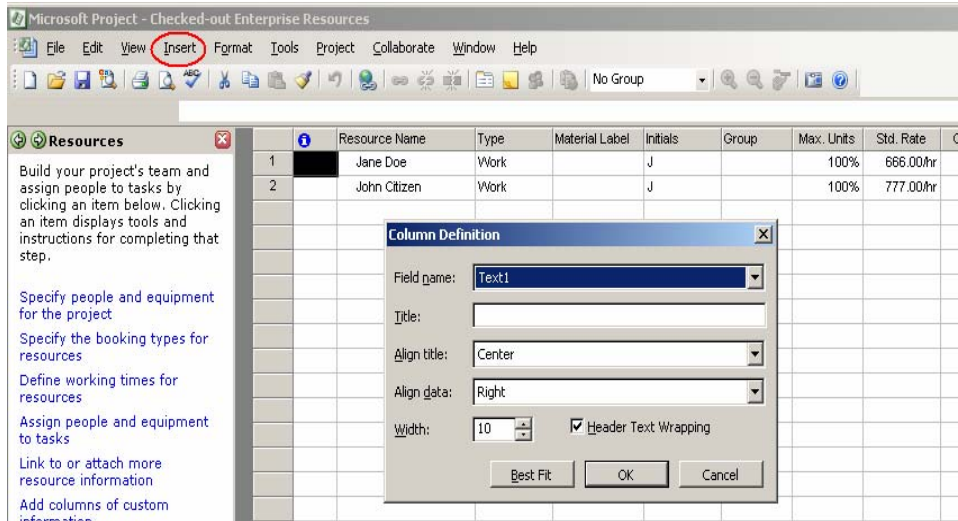
How to update enterprise resources

The StarProjects Resource Wizard can be used to help create the initial set of resource names and rates in the Project Server pool. Once the resource exists in the pool, then Project Professional / Project Server is used to maintain the details thereafter.

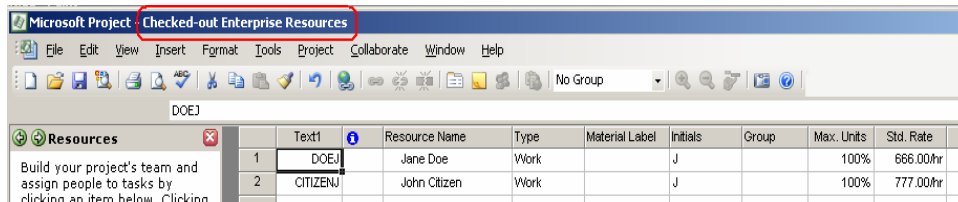
- 1) Using Project Professional, select the resources that need to be updated so that they are checked out for editing.



- 2) If required, expose the Resource Code that links the resource to StarProjects.



- 3) Edit the details as required



- 4) Save the amended resource details and close the 'checked-out' resources screen. This will automatically update the Project Server resource pool and release the check-out status of the resource.

How to view StarProject enterprise resources in the Resource Center

Use Manage views to create a new view that will appear in the Resource Center

Microsoft Office Project Web Access

Home | Tasks | Projects | Resources | Status Reports | Updates | Risks | Issues | Documents | **Admin**

Administration overview

Actions:

- Manage users and groups
- Manage security
- Manage views**
- Server configuration
- Manage Windows SharePoint Services
- Manage enterprise features

Manage users and groups
Add or modify users and groups of users, and set their security permissions and properties. Synchronize f

Manage security
Set security permissions on collections of projects, resources, and assignments. Create and edit template: authentication.

Manage views
Define views for Project Center, Resource Center, and Portfolio Analyzer.

Server configuration
Specify the features that should be available on Project Server and define the menus that are displayed in

Microsoft Office Project Web Access

Home | Tasks | Projects | Resources | Status Reports | Updates | Risks | Issues | Documents | **Admin**

Specify Views

Actions: **Add View** | Modify View | Copy View | X Delete View | Get Additional Views

View Name	View Type	View Description
Tracking	Project Center	Displays schedule vs. baseline dates
Work	Project Center	Displays work information
Assignment		
Summary	Assignment	Displays basic timesheet information
Resource Center		
Corporate Resources	Resource Center	Displays corporate resources
Malaysia Manufacturing Resources	Resource Center	Displays resources in manufacturing d
Resources Summary	Resource Center	Displays basic resource information
Salt Lake City IT Resources	Resource Center	Displays IT resources in Salt Lake City
San Jose IT Resources	Resource Center	Displays IT resources in San Jose

Microsoft Office Project Web Access

Home | Tasks | Projects | Resources | Status Reports | Updates | Risks | Issues | Documents | **Admin**

Specify Views

Complete the following steps, and then click Save Changes below.

View Type

Project Project Center Assignment **Resource Center** Portfolio Analyzer

View name and description

Name:

Description:

Fields: Select the fields you want displayed in the view

Available fields:

- Start6
- Start7
- Start8
- Start9
- Text10
- Text11
- Text12
- Text13
- Text14
- Text15

Displayed fields:

- Unique ID
- Resource Name
- Text1**

Buttons: Add >, < Remove, << Remove All, Up, Down

Categories (Optional): Select the categories that this view belongs to

Available categories:

- German Category
- Malaysia Manufacturing
- My Direct Reports
- My Tasks
- New Business Resources
- Salt Lake City IT Category

Categories this view belongs to:

- My Organization
- My Projects
- My Resources

Buttons: Add >, Add All >>, < Remove, << Remove All

RBS Filter (Optional): Filter Resources to user's RBS branch

Filter Resources to user's RBS branch

* If an RBS structure is defined in this enterprise, enabling this feature limits the resources displayed to those managed by the current user and is useful for creating a "My resources" view.

Buttons: Save Changes, Cancel

In the example above, Text1 has been selected as it contains the link data between Project Server and StarProjects for a resource. Text1 contains the Star resource code. Text1 is a configurable setting in Options Explorer if it is already being used.

Star Projects - dtbaismant.patest640.sa

File Edit Processing Maintenance Reports Options Windows Help Languages Custom Plug-Ins

Options Explorer

Key Name	Value	Description
ab Allow MPP plans	1	(0/1) - 1= Enables the use of mpp format in PA - MS Project integrator
ab Allow SQL plans	0	(0/1) - 1= Enables the use of SQL format in PA - MS Project integrator
ab Default Plan Type	MPP	(MPP/ODBC) - ODBC = Sets the default plan type to SQL.
ab DSN Name	MS_Project_ODBC_DSN	(Any valid DSN Name) Contains the name of the DSN used MS Project
ab Field to hold actual amount	Cost1	(Cost 1 to Cost 10) Determines which field in the plan is to contain act.
ab Field to hold actual qty	Duration1	(Duration 1 to Duration 10) Determines which field in the plan is to cont
ab Field to hold PA Activity Code	Text15	(Text 10 to Text 20) Determines which field is to contain the code link t
ab Field to hold PA Phase Code	Text11	(Text 11 to Text 20) Determines which field is to contain the code link t
ab Field to hold PA Resource Code	Text1	(Text 1 to Text 10) Determines which field is to contain the code link tc
ab Field to hold PA Task Code	Text1	(Text 1 to Text 10) Determines which field is to contain the code link to
ab Field to ignore Task Line for PA	Flag1	(Flag 1 to Flag 10) Contains the name of the field used to exclude bud
ab Project Server URL	http://dtserver2003/sample	Specify the URL address of the MS Project Server

After saving the new view, use it in the Resource Center to display all the enterprise resources that have a link to StarProjects. Clicking on the Text1 column heading sorts the data so that all the linked resources will appear together. In addition, the filtering option on it can be used to only show resources where Text1 is not blank.

Microsoft Office
Project Web Access Log Off

Home | Tasks | Projects | **Resources** | Status Reports | Updates | Risks | Issues | Documents

Resource Center Choose a view: **StarProjects Resources**

Actions:

- View enterprise resources in Resource Center
- Analyze resources in Portfolio Analyzer
- View resource assignments
- Adjust actuals
- View timesheet summary
- Approve timesheets

View Options Filter, Group, Search

Save Link... View Availability... Edit... Open...

Unique ID	Resource Name	Text1
250	William Vong	
251	Yvonne Schleger	
252	test resource	
253	Mel Gibson	GIBSONM
254	Rolf Harris	HARRISR
255	Paul Hogan	HOGANP
256	Nicole Kidman	KIDMANN
257	Heath Ledger	LEDGERH
258	Kylie Minogue	MINOGUEK

MS Project Enterprise Templates

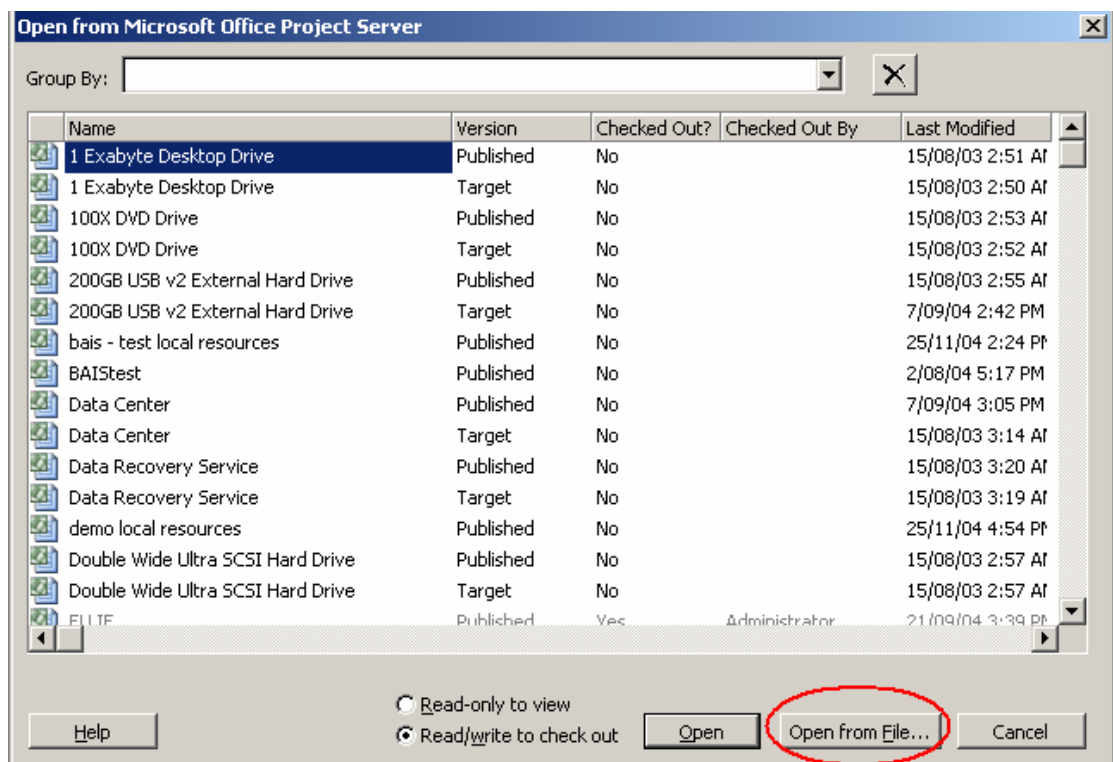
The following paragraph is a direct quotation from the Microsoft Project help text that explains what templates are.

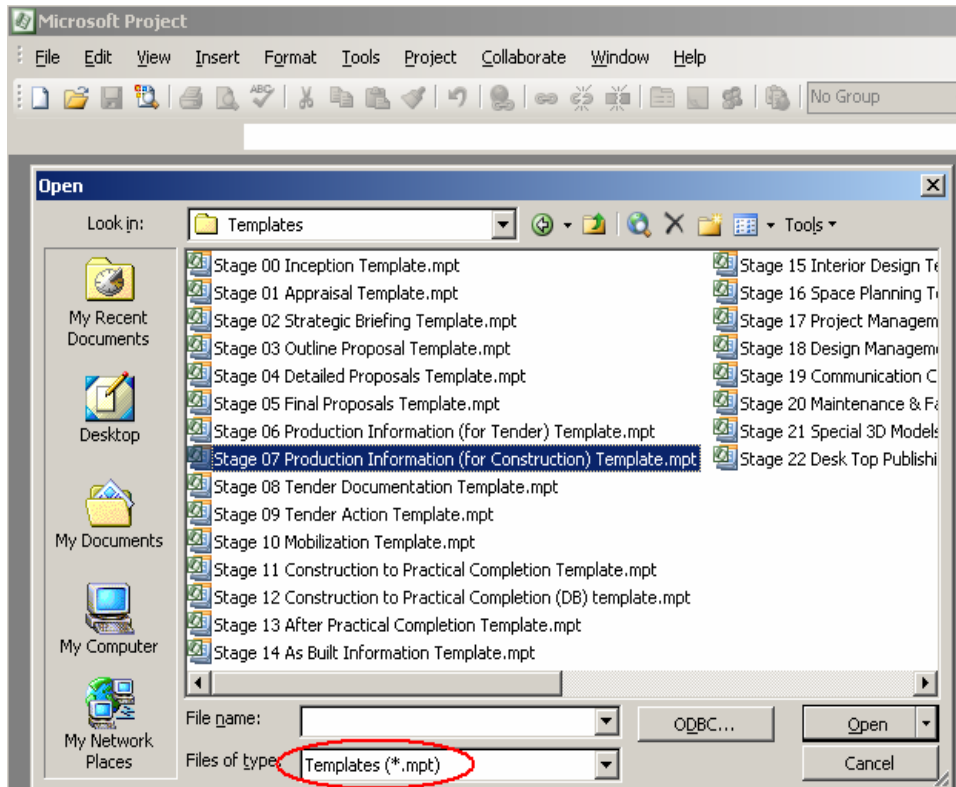
Microsoft Office Project 2003 provides several templates (A Project file format [.mpt] that lets you reuse existing schedules as the starting point for creating new schedules. Task and resource information, formatting macros, and project-specific settings can all become part of a template.) you may want to use to start a new project.*

How to use MS Project templates with StarProjects

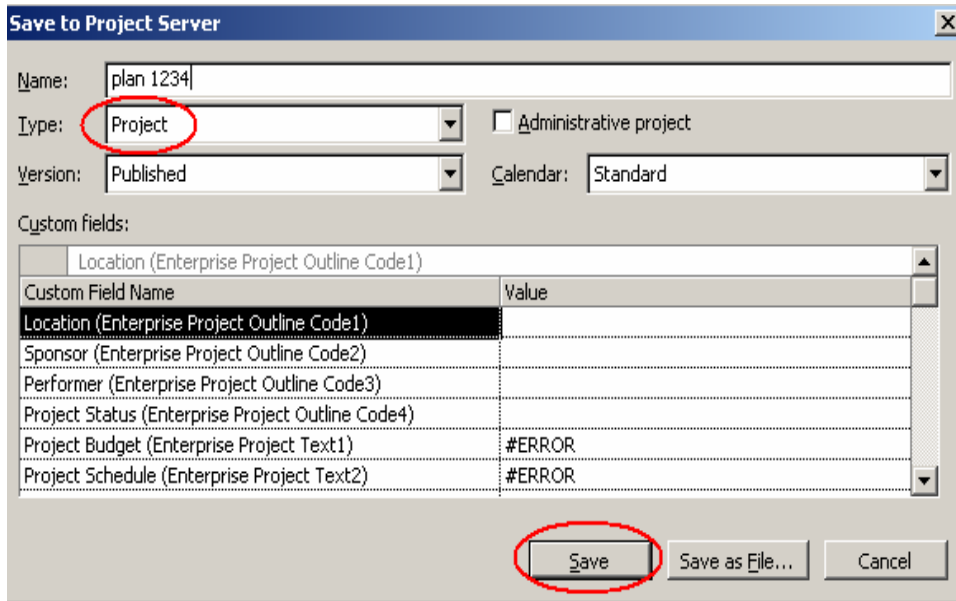
StarProject Wizards communicate with project plans that exist in Ms Project. Templates can be used to create new projects in Ms Project which can then be used to transfer details between ProjectServer and StarProjects.

- 1) Open an existing Ms Project Template by using the File / Open menu option to bring up the first dialogue screen. The *Open from File* button is then used to bring up a second dialogue screen for you to select an existing template. Be sure to use the correct file type (*.mpt) to select the template file.





- 2) Using the File / Save As menu, immediately save the skeleton plan as a project



- 3) Proceed to use the StarProject Wizards in the normal manner and tailor the plan accordingly by editing the details as required.
- 4) Edit the required plan details in Project Professional in the normal manner