Using Observatory Reporter for Microsoft Project

Overview

When you have prepared a project plan with Microsoft Project 98 or Project 2000, you can send this plan to the observatory very easily using the Observatory Reporter for MSP98 addin which we call OR98.

OR98 creates an XML compliant project abstract and emails it to your observatory database. It uses the data found in you project plan for tasks and resources. In addition, allows you to add open issues, management targets, and a status report.

This software is licensed as part of the Marin Research Project Observatory System. It can be distributed to all MS Project users in your licensed organization without additional charge.

Installation

To install Observatory Reporter for MS Project 98

1. Find the file "OR98.mpp" on the installation CD in the directory "MSLink".

2. Load MS Project 98.

3. Open the file described above.

4. The system will prompt you for confirmation and warn you about possible hazards of using macros. Select the option "Enable Macros".

The observatory toolbar item, showing a running figure next to the word "Observatory", will appear.

5. Close and save everything.

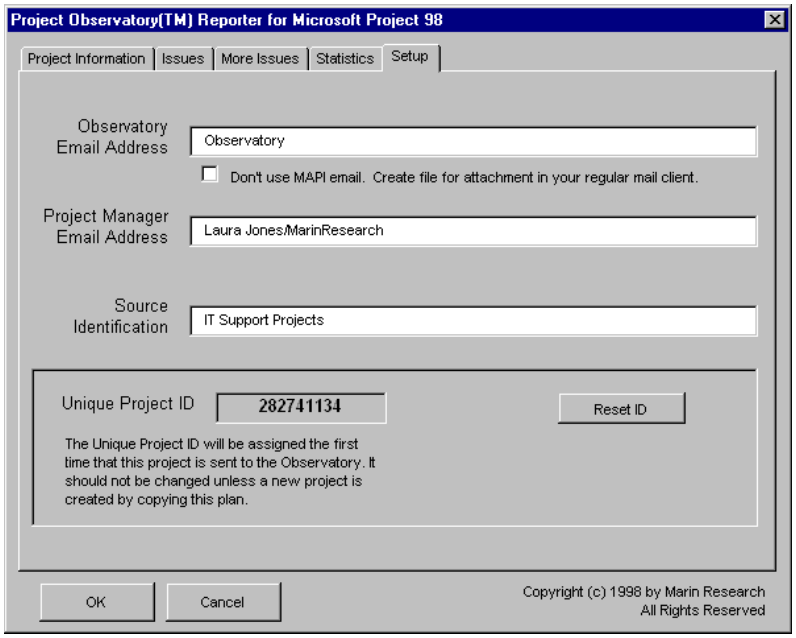
Note: Macros are stored in a file called "Global.MPT" along with many other default settings. Some organizations keep this file on a Read/Only network drive so that all uses have the same setting. If you have this situation, you will get an error message when trying to save and will need the assistance of the network administrator.

Reporting on a Project for the First time

1. First, load your plan.

2. Press the "Observatory" toolbar button. This will display the OR98 dialog box. When reporting about a project for the first time, the setup tab will be displayed. When reporting on subsequent occasions, you will start at the Project Information tab.

Setup Tab



Observatory Email Address

You will get this from your observatory administrator.

If this field is grayed out, it is because MAPI, the Microsoft Windows mail mechanism is not configured on this workstation. In this case, a message appears that tells you that report file will be prepared. You can then attach this report file to a message created in your email client and send it to the observatory.

Even if MAPI is configured, you may still prefer to create the report files and email them manually. To do this, click the checkbox provided under the mail address field.

MAPI is configured using the Mail item on the Windows control panel, but this task probably should be left to an experienced mail administrator.

Project Manager Email Address

This should be your personal email address. Enter this as you would give it to a friend. Usually this will be your Internet or Notes Email address. This address is used by the observatory to send messages to you.

Source Identification

This is a text string that identifies either you or your department to the observatory administrator. The administrator may assign this to you.   If you have no other instructions, enter your name or your department name followed by the word "Projects" e.g. "Bill Jones Projects"

It is important that you use the same identification on all the projects that you send, otherwise you will greatly increase the workload of the observatory administrator and delay the correct classification of your projects and resource commitments.

Unique Project ID

The unique project ID will be assigned automatically for a new project. You should never reset it during the life of the project.

Exception: If you make a copy of the file and then modify it to become the plan for a new project, you should reset the ID value so that the observatory recognizes your new plan as a new project and not as an update on the existing one.

Project Information Tab

Name

This is the name of the project as found in the File, Properties, Summary, Title dialog. If you change the name here, it will also change in that location.

Classification

The default choice is "Approved Project"

The optional choices are:

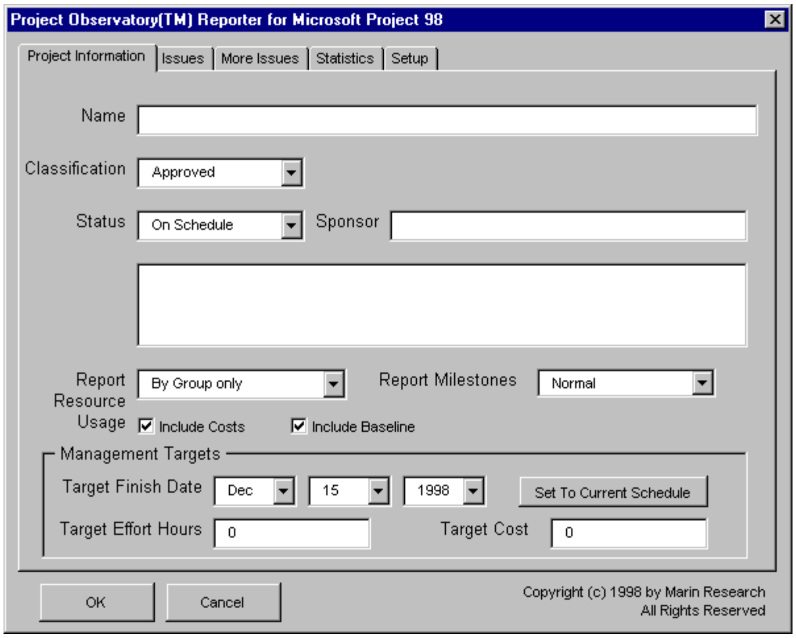
Approved Until - when you select this choice, the date field will ungray and you enter the date at which approval ends. Work scheduled after this date will be counted as "proposed"

Proposed - This means that the project is not committed, but being sent to show the anticipated work.

Finished - A finished project will report only actual work. Planned work, if any, will be ignored by the observatory.

Canceled - A canceled project acts like a finished one but shows a canceled status in the observatory.

On Hold After - when you select this choice, the date field will ungray and you enter the date at which approval ends. Work scheduled after this date will be counted as "proposed"



Status

The original status is "On Schedule" with several other choices available in the drop list. This is your assessment, which does not necessarily have to be consistent with the numerical data about the project.

Next to this listbox is a text area where you should write a brief synopsis of the project. This text will appear in the observatory project report as the current status of the project.

Report Resources

The original setting is "By Group Only".

Resource Reporting Options

Report Resource Usage by Individual - detailed resource usage profiles will be sent for each person. This should only be used if the observatory administrator is going to create Member reports for each individual, otherwise the group options are more practical. If your project has a large number of resources, you should talk with the administrator before reporting. In many cases they will direct you to use one of the group options which greatly reduces the administration effort and the amount of data being processed.

Report Resource Usage by Group if Available - for each group defined, all the work for the resources in that group will be lumped together. Resources that are not part of a group will be reported as individuals.

Report Resource Usage by Group Only - This is the same as the previous option except that resources that are not part of any group will be lumped into a default group called "All Other".

Report Resource Usage as Total - a single resource report, summing up all the work in the project, will be sent to the observatory.

Report Resource Usage as None - no resource details will be created. Only the project schedule and issues will be reported.

Groups

Reporting makes use of the Resource Name and Group defined on the Resource Sheet. You should specify a group for each person. Make sure you spell the group names consistently. Even if you are reporting by individual, you should have groups defined. Multilevel groups can be created by using the backslash symbol.

For example entering "Eng\QA" into the Group field for a resource means that the resource is a member of the "QA" Team within the "Eng" department.

Resource Reporting Checkboxes

Include Costs - If checked, the actual and planned costs for the project will be reported. If not checked, no cost data will be sent.

Include Baseline - If checked the baseline for the project schedule and resources will be sent.

Report Milestones

The original setting is **Normal**. All milestones in the project will be sent with the task name as the milestone title.

Optional Setting **- Cloaked -** When this option is used, milestones will be reported, but the titles of each milestone will be "Milestone nn" where the nn is a number. The number will be the unique task identifier in MS Project. The purpose of this option is to prevent the actual task names from being sent to the observatory. This is useful for client projects where the client plan details cannot leave the job site. Note: The project manager can display the unique task ID's as a column in MS Project.

Management Targets

Every project has some limits and most have specific goals. These goals may be impossible to meet or they may be very conservative. The values entered here are used to construct the dashboard of the observatory for your project. That dashboard shows color coded indicators that reflect your projects' performance against these targets.

Target Finish Date

This is the management target for the project completion date. It should be set to whatever date you have committed to achieve. If you have no specific commitment (a "do it when you have time" project) then set this date six months after your anticipated completion. If you are showing anything other than a green indicator on the observatory dashboard, you many need to change this date!

Target Effort

This is the management target for effort spent on the project. If you have not been given a specific target, pick a realistic number based upon your staffing (3 people for 6 months = 3,000 hours) . If you have no target, leave the field blank.

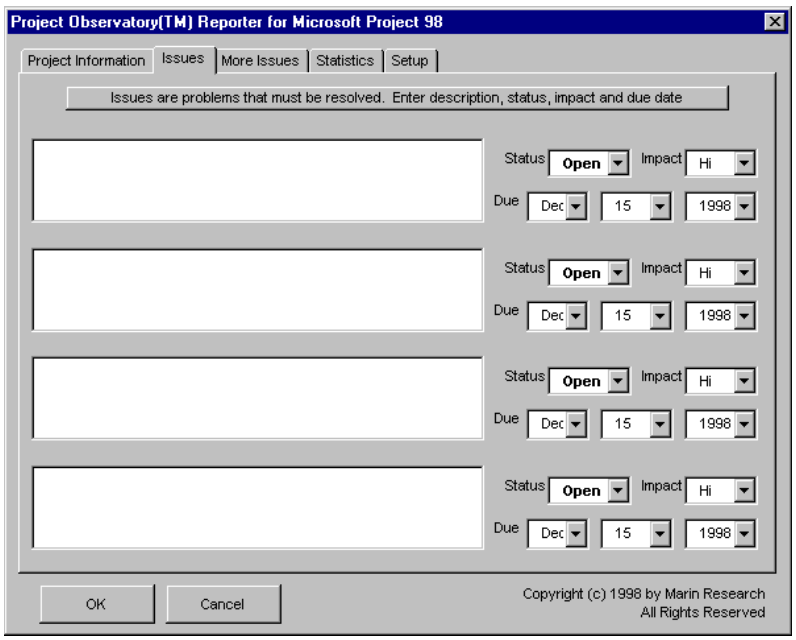
Target Cost

If you will be reporting costs, enter the budget. If not, leave blank.

Issues Tab

The two pages of issues allow you to describe up to 8 problems that need attention.

Issues are specific problems that must be resolved. By entering them here you are announcing them to your management community and implicitly asking for help.



Issue description

Describe the problem in a sentence or two. If the description is blank, then the issue will not be sent.

Status

Select Open, Resolved, Deferred or Risk.

Open issues are those that need resolution. Deferred issues have been postponed. Resolved issues are complete. Risk issues are possible future problems that you need to prepare for, but which are not yet impacting you.

Impact

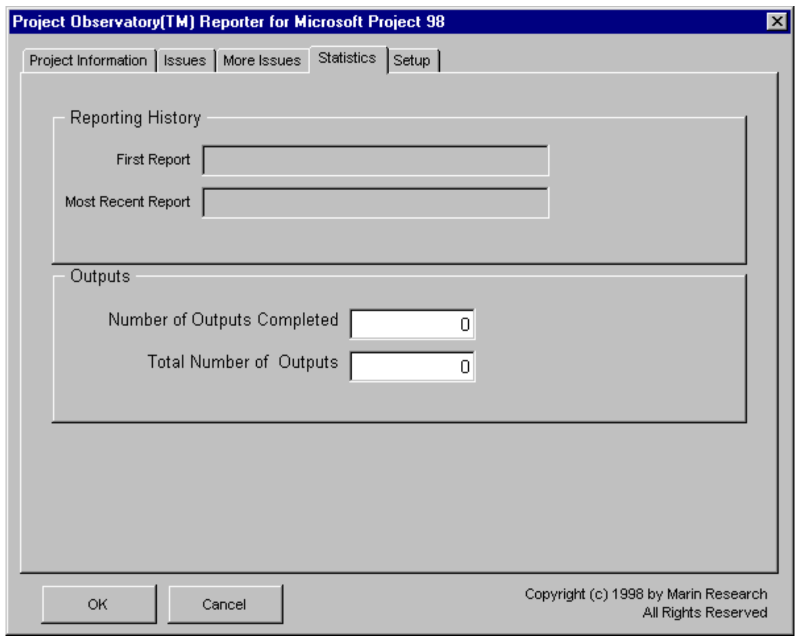
Select High, Medium, Low to describe how the project is affected by the issue.

Due

Enter the date by which the issue must be resolved before it impacts on your schedule or budget. When an issue is overdue, this fact may be reported to the program manager by observatory agents to call attention to the project.

Statistics Tab

This page displays the report dates and also allows you to enter the number of outputs created in the project.



Outputs are results delivered by your project. These might be reports, papers, specifications, drawings, etc. If you make a list of outputs and keep track of the number completed, enter the counts here. This can be a really good measure of project accomplishment if you use the same list for similar projects.

Sending the Report

Once you are satisfied with the settings, press the OK button. The current project will be saved with your current settings. Next, the project abstract report will be prepared. The preparation time is a function of the size of the project and the options selected. It can be several minutes for a very large project plan with thousands of tasks.

When the report has been prepared, if email delivery is enabled, then the message will be sent and a completion dialog will appear. If email is not enabled, or the checkbox option on the observatory address field is checked, will get a dialog showing the name of the report file prepared.

The actual mailing process can be somewhat complicated depending upon how MAPI mail is configured on your workstation. Generally you will get at least one prompt to select your mail profile. Then you may get another if the observatory address in not in your personal address book.   Along the way you may get one or more requests for passwords to log into the mail system.

Updating your Report

Every week you should update your report.

1. Load your plan and make sure it is up to date with the progress of the project.

2. Press the toolbar button to display the OR98 dialog. Review the issues to see if any have been resolved and add any new ones. The other settings probably won't need to be changed.

3. Press the OK button.

Reporting on Multiple Projects

Each project should be reported by following the instructions above.

Use consistent resource names and a common Source Identifier. This saves the observatory administrator time and prevents mistakes. Using a resource pool is an excellent idea. The advantage of this is that subsequent projects will require no additional setup in the observatory because the program and organization associations for each you source will already be in place.

If resource naming and groups are defined differently from one project to the next, then you must get a new Source Identifier for each project. This will force the observatory administrator to define the mapping for the resources to the correct organization.

Sending Reports Manually

When a report is prepared for manual transmission, a dialog appears telling you the report file name. The file name, will be the file name of the project followed by .txt. So if the project was C:\plans\myproj.mpp then the report will be C:\plans\myproj.mpp.txt. It looks strange, but it works fine. The file is in fact an ASCII text file containing XML markup tags. Thus is can be handled by every email system and generally get through all firewalls that allow attachments.

To send a report, simply compose a new email with your regular mail client. Set the "Send To" address as the observatory email address and use the "File Attach" feature of your mail client to attach the report. Don't put anything else into the body of the message. The subject can be left blank.

Posting Reports Directly into the Observatory

The project abstract can be placed directly into the Observatory without the use of email. ***To do this:***

1. Open the Observatory database

2 .Select Management on the opening Navigator

3. Select "Submit a project report" on the bottom of the Management navigator.

This will display a Project Submission form onto which you can attach the .txt file as described above. Do not put you .MPP file here!

4. Submit the form.

Email Setup

This software uses MAPI (the Microsoft Mail Applications Programming Interface) to create email. The MAPI system, in turn, makes use of various setting in your client operating system.

You may have to work with you mail administrator to configure your system so that you can successfully send issue email directly from the software.

Your email address is passed along to the observatory database so that observatory agents and users can communicate with you using regular email.

Note to Administrators: Mail-in Notes databases may not show up in the Notes Name and Address book when it is viewed through the MAPI system. To get around this limitation, you should create a group in the Notes Name and Address book containing the observatory database as its only member. The group will appear in the MAPI view, even though the mail in database will not.