

Using ABT Project Workbench 3&4

Preparing the Project

Project Workbench projects must be saved in .FIX format before being used by Project Gateway. This can be done with the File SaveAs command, setting the format selection in the dialog to .FIX.

There are two subjects concerning ABT projects that require decisions before you import projects. These are the TaskID and Resource Naming choices.

Assigning Task Identifiers

Project Gateway lets you use either the Task ID or TaskKeyValue field as your synchronization key. The TaskKeyValues are preferred because they will stay with the task if it is moved in the project outline. This choice is determined by an INI file entry you must set on your workstation. The Task ID field is the default.

To enable the use of the TaskKeyValue, open the MarinPMG.INI file on your workstation and add the line.

```
[abtworkbench]
useTaskKeyValueAsID=1
```

If the file already contains a section entitled [abtworkbench], add these and other new parameters to that section, make sure when you are done that the heading [abtworkbench] occurs only once in the MarinPMG.INI file.

Note: Set this parameter to zero to use Task ID rather than the TaskKeyValue.

Note: Because this is implemented as an .INI file setting, not as a project specific property, the setting will apply to all projects that you publish or synchronize from your workstation.

If you use the default Task ID, then you must assign each Task and Milestone a **unique Task ID** code that you must never change after the project has been published. This is very important to ensure proper synchronization. You can change the task description so long as the task ID remains the same. If you delete the task, do not reuse the task ID on another task until at least one *synchronize update notes* cycle has been completed. Better yet, never reuse the task id code in this project.

If you use TaskID for synchronization, add the following option to the [abtworkbench] section

TaskIDValidation=1

With this parameter set, a warning dialog will be displayed at the completion of the import process if any tasks have missing or duplicated Task ID's. If this warning appears, you should correct the problems before updating the repository.

Resource Naming

Within Project Workbench, each resource has a unique 4 character code. When multiple project workbench plans are consolidated for reporting in group files, the 4 character codes are used. Nothing in Project Workbench, however, forces you to have descriptions of each resource, or to ensure that the same description is used in every plan that uses that resource.

Because the repository database is designed for the use of participants, it is important that participant names be used, not 4 character codes, on assignments.

To make this possible, yet deal the variety of ways in which Project Workbench is used, Project Gateway provides several options for handling Project Workbench resources.

Single Project Operation

When a project is imported, for all those resources that have descriptions, the participant name will be the description, for any that do not have descriptions, the participant name will be the 4 character Resource ID.

Because the participant names are used for matching, the resource descriptions must not be changed once the project is published, and all resource descriptions must be unique.

Multiple Project Operation & Resource Renaming

If you have several PMW plans, all must use the same resource descriptions for each resource in order to match to the same participant profile. This can be difficult to administer.

To handle resources when multiple projects are involved used you should first prepare a .FIX file containing all the participants that Will be in any of your projects (the whole department list) with the ResID's and correct participant descriptions .

Publish this plan to create the participant profiles. Each will contain both the description as the Participant Name and the ResID as the alternate name.

Now set the following two options in the indicated sections of *your workstations MarinPMG.INI file and that of all other workstations of other projects in this department.*

[current]

AutomaticResourceRenaming=1

[abtworkbench]

useAbbreviationAsName=1

The AutomaticResourceRenaming=1 option adds an additional step into the Project Gateway processing that looks for existing participant profiles whose participant name or alternate name matches the name imported from the PMW plan. If so, it associates the existing participant with that resource and uses the participant name for all assignments published for that project plan.

The useAbbreviationAsName=1 option causes Project Gateway to ignore all resource descriptions when importing PMW schedules and use the ResID as the resource name in all cases.

The net effect is that resource assignments will be published under the repository participant name, but synchronized using the PMW ResID.

Note: If you do not want to create a separate .FIX file for the initial resource load, but have an existing .FIX file which does have all the resources with correct descriptions. You can use the option "CreateParticipantsOnly" to upload only the participants, but none of the project tasks. See the appendix.

Note: You must ensure that the combined set of Participant and Alternate names contains no duplicates. If you use ResourceRenaming, use it all the time. If you use ResourceRenaming, do not use the Edit Resource Selection option. If you change a participant name in the repository after assignments have been created, you must Synchronize Update Notes all projects using that participant in order to get the new name to appear properly in all views. It is better to make changes to participant names before importing all the projects.

Category Codes and Repository Organizations

PMW Category codes of resources become the repository organization codes of new participants when they are created. This does not occur during synchronization of existing participants.

After import, you should create the organization profile documents for any new organization codes that have been used.

Preparing your PMW Project for Publication

Set the project name before importing the first time. If no project name is found, the file name is appended to the word "Project" to form a default name. All project names should be unique in the Notes database. If your project has the same name as an already existing project, Project Gateway will stop during the Create process to ask you for a different name. Once the project is in the repository, the name shown in Notes will not change.

It is best practice to **set the project baseline** before importing the first time. The baseline values are stored in Notes as *program reference parameters* for each assignment. If you need to change these reference

values at some future time, you must set the Project Profile Reset Reference field to Yes prior to synchronization and the Reset Reference checkbox during synchronization.

Priority Field

The priority field is imported as a value from 0 to 37. The value is 0-9 if the ABT Project Workbench priority field is a digit, 10 if it is blank, or 11-37 if it is "A" - "Z". To get this value into the Notes database, change the Field Map to include the field "Task Priority".

Document Tracking

Document tracking instructions can be placed in a task or assignment note, or in the task deliverables field. See "Using Document Tracking" for the required format

Taskhelp

Task help can use the Guideline(Aux1), Deliverable(Aux2) or ID (ActID) fields

Time of Day

Project Gateway always displays time of day in Notes. Since Project Workbench does not use times, task start and finish times are set by default to 8 AM and 5 PM. This can be changed by using the following MARINPMG.INI settings.

```
[abtworkbench]
```

```
StartHour=8
```

```
EndHour=17
```

If present, these values are used to set the start time and end time of tasks imported from Project Workbench. If not specified, StartHour is assumed to be 8 (8AM) and EndHour is assumed to be 17 (5PM).

Entries greater than 23 are ignored.

Tracking Periods

In order to maintain period based actuals, the tracking periods in Project Workbench must be exactly the same as those set in the Notes database. The Project Workbench setting of Weeks starting on Monday is consistent with the default setting of the Project Gateway prototype database and should be used. Project Gateway will support workweeks beginning on other days, but you must change the Period settings when creating the database so the database period start is on the same day of the week as the Project Workbench period start.

Project Workbench Annotation

Task and Assignment Notes are handled in a special way. Within each Notes assignment document, the *tasknote* field will contain a composite of all of the Project Workbench task notes for that task, plus all of the Project Workbench assignment notes for that particular assignment. Each item is preceded by the author and the last modification date. The items are not shown in order, but the set of task items will precede the

set of assignment items and will be separated by a short line segment. Each time you *synchronize update notes*, the tasknote field will be updated with the current set of note items in the Project Workbench plan.

You can also create an input area in the Notes assignment document for comments that will be sent back to Project Workbench as an assignment note with the creator name "ProjectGateway". This allows convenient two way communication between the project team and the manager.

To do this:

1. In the Field Map of the Notes Database, add a field using the CPF title "Assignment Note" to the field map. This is most easily done when creating the database for the first time. Use the notesfield name you define here in step 2.
2. Add the matching notes field name to the Assignment form. Define the field to be text, multiple values, and set the separators to be Line Feed, with Line Feed displayed.

When you enter text into this field and *synchronize update project*, you will find that the assignment in Project Workbench will have a note whose creator name is "ProjectGateway" and which contains the specified text. Each time you *synchronize update project*, the text in that Project Workbench assignment note will be updated to be the current text in the Notes Assignment document.

Note: In order to prevent the same text from appearing twice, the contents of a Project Workbench assignment note whose author is "ProjectGateway" will not be part of the text that is published in the Notes *tasknote* field.

Limitations

Project Gateway ignores Project Workbench subprojects. Only those tasks and milestones that are part of the current file are imported (or updated). If you have several subprojects, import each as a separate Notes project, and synchronize each independently.

Project Gateway also ignores dependencies between projects defined in Project Workbench. You can, however, create InterProject dependency documents in the Notes repository to monitor these relationships.

When constructing the Hierarchy field and the outline view, only the top three levels, Project, Phase, and Activity are used. Any extra levels that you may have defined in your Project Workbench work breakdown structure are ignored. When tasks are matched that do not have unique task IDs, name matching is used to distinguish among them. Only those levels shown in Notes are used to distinguish between identically named tasks.

Using Synchronize Update Project

Adding Tasks And Assignments

New Tasks, Participants, and Assignments created in Notes can be added to your Project Workbench plan during synchronization if the "Add New Tasks..." checkbox is selected on the Update Project Dialog.

When new resources are created during synchronization, if the first 4 characters of the Project Gateway Participant name have not been previously used as a Project Workbench resource abbreviation, they will be assigned. If not, a new resource abbreviation will be created in the form Rxxx where xxx is a number assigned by Project Gateway.

When new tasks are created during synchronization, they will be found at the bottom of the task list. You can rearrange them, add Phase and Activity headings, etc. before synchronizing back to Notes. You should also assign new unique task IDs to any tasks created in Notes and added during synchronization. *Do not rename any Notes created tasks until at least one Synchronize Update Notes cycle has been completed.* The reason is that the new tasks will be name-matched with the Notes database on the first synchronization cycle. After this, the new task ID codes will be stored in Notes and used for matching.

When new tasks and assignments are created, the WBS and keyword fields in the new assignments in Notes will be set on the new tasks. When updating the .FIX file, Project Gateway will set these values into the ShortName and category fields of the new task.

InterProject Dependencies

A task that is controlled by an InterProject Dependency in Notes will be **locked** to the date of the dependency during Synchronization if the "Adjust for InterProject Dependencies" option is checked.

Updating Dates and Task Duration

Project Workbench requires that all schedule dates fall on workdays in the project calendar. To accommodate this, when a task start or finish reported in Notes occurs on a non-workday, the date shown in Project Workbench will be pushed forward to the next project workday.

If the task has not actually started, the planned dates shown in Notes will be used to replace those currently stored in the Project Workbench plan. This allows Notes users to easily make schedule changes. These revisions may be lost by the use of the scheduling functions unless you lock the tasks prior to rescheduling.

Adjusting Task Durations

Project Gateway will recompute task durations to be consistent with total work on the task. This calculation takes into account the latest actual dates for reported on the assignment.

If an assignment has actual work reported for most of its scheduled duration, but still has hundreds of hours of work remaining, the finish date of the task will be adjusted by enough days to let the resource

accomplish all of the remaining work at full capacity, starting after the end of the last period for which actuals have been reported.

This can lead to significant adjustments of task end dates. The way to avoid this is to reduce the work remaining to realistic levels in the repository.

Updating Actual Hours by Period

Actual Hours reported in Notes will be posted to the equivalent reporting period in Project Workbench and can be viewed using the QuickTrack views. For this to work with a Notes database generated with the default reporting periods, the tracking periods must be set to weeks, and the Project Workbench workweek must start on Mondays.

Two Way Planning

Two way planning is supported. If the planned start is changed, the date entered will be advanced to the next work day on the Project Calendar and set as the scheduled start date.

If the planned finish is changed, the duration of the task will be adjusted to cause the task to finish on the date specified, or on the next project workday if the specified date is not a workday. An assignment note is written on the assignment detailing the user changes.

Task Notes Generation

[abtworkbench]

makenotes=1

if =1, Project Gateway will, when necessary, create new Assignment Notes in Project Workbench during Synchronize Update Project. if =0, this will never be done. It is provided for compatibility with versions of Project Workbench that do not allow notes in the .FIX files.

Zero Filling Periods

[abtworkbench]

zeroToThisWeek=1

If the option is set=1 then the system will create "zero" week records for every period after the last non-zero actual.

This will prevent PMW from pushing unfinished work into the past.

Common Project Fields - ABT Project Workbench for Windows Version 3&4

C - Create Notes Database and Synchronize Update Notes

SP - Synchronize, Update Project

	Common Project Format Data Name	Notes Field Format	C	S P	Corresponding Project Workbench Field
1	"Task Name"	text	y	n	Task Name
2	"Task Scheduled Start Date"	date	y	y	Start
3	"Task Scheduled Finish Date"	date	y	y	End
4	"Task Baseline Start Date"	date	y	n	Baseline Start
5	"Task Base Line Finish Date"	date	y	n	Baseline End
6	"Task Baseline Cost"	number	y	n	N/A
7	"Task Baseline Work Hours"	number	y	n	Baseline Usage
8	"Task Actual Start Date"	date	y	y	Start (if task is started)
9	"Task Actual Finish Date"	date	y	y	End (if task is done)
10	"Task Actual Cost"	number	y	n	N/A
11	"Task Actual Work Hours"	number	y	y	Task Actual Usage
12	"Task Actual Percent Complete"	number	y	y	% Complete
13	"Task Additional Cost"	number	y	n	N/A
14	"Task Total Cost"	number	y	n	N/A
15	"Task Priority"	number (0- 9999)	y	n	Priority field
16	"Task WBS Code"	text	y	n	ShortName
17	"Task OBS Code"	text	y	n	Deliverable field
18	"Task Notes"	text	y	n	Task Note (a composite of all task notes and all assignment notes)
19	"Task Responsible Manager"	text	y	n	N/A
20	"Task Keyword"	text	y	n	Category
21	"Project As Of Date"	date	n	n	N/A
22	"Project Task Count"	number	y	n	N/A (computed)
23	"Project Start Date"	date	y	n	From Project Header
24	"Assignment Resource Name"	text	y	n	Resource Description
25	"Assignment Resource Index"	number	y		N/A (computed)
26	"Assignment Work Rate Percent"	number	y	n	N/A
27	"Assignment Total Work Hours"	number	y	y	Total Usage
28	"Assignment Baseline Work Hours"	number	y	n	N/A
29	"Assignment Actual Work Hours"	number	y	y	Assignment Actual

30	"Assignment Scheduled Overtime Work"	number	y	n	N/A
31	"Assignment Actual Overtime Work"	number	y	n	N/A
32	"Assignment Total Cost"	number	y	n	N/A
33	"Assignment Baseline Cost"	number	y	n	Assignment Baseline Usage
34	"Assignment Actual Cost"	number	y	n	N/A
35	"Assignment Start Date"	date	y	n	From Task Start
36	"Assignment Finish Date"	date	y	n	From Task
37	"Assignment Duration"	number (hours)	y	n	N/A (computed if required)
38	"Assignment Work Rate"	number (0-100)	y	n	N/A
39	"Assignment Percent Complete"	number (0-100)	y	n	N/A - used to compute Task %
40	"Assignment Actual Start Date"	date	y	n	N/A Used to set Task Actual Start
41	"Assignment Actual Finish Date"	date	y	n	N/A Used to set Task Actual Finish
42	"Assignment History"	text	y	n	N/A Used to set Actual Hours
43	"Resource Name" (this name is the result of the Edit Resource Selection renaming option if that is used)	text	y	n	Resource Description
44	"Resource Standard Cost"	number	y	n	Resource Billing Rate
45	"Resource Overtime Cost"	number	y	n	N/A
46	"Resource Cost Per Use"	number	y	n	Billing Rate if not hours or days
47	"Resource Capacity"	number	y	n	R Count
48	"Resource Special Units"	text	y	n	N/A or "units"
49	"Resource Initials"	text	y	n	Resource Abbreviation
50	"Resource Notes"	text	y	n	Resource Notes
51	"Resource Code"	text	y	n	N/A
52	"Resource Group Code"	text	y	n	Resource Category Code used to set the Organization field in Participant Profile.
53	"Resource Original Name" (this name is used during Make Project and Synchronize if the Resource Name has been adjusted using Edit Resource Selection Renaming)	text	y	n	Resource Description
54	"Resource Index"	number	y	n	N/A (computed)
55	"Task Index"	number	y	n	N/A (computed)

56	"Task Hierarchy"	text	y	n	Derived from task names and outline structure
57	"Assignment Work Remaining"	number	y	y	Computed from Total Usage-Actual on import, used to set Total Usage on export.
58	"Task AUX1/TEXT1"	text	y	n	GuideLine field (if not 0)
59	"Task AUX2/TEXT2"	text	n	n	ID field from task
60	"Task AUX3/TEXT3"	text	n	n	Short Name from the Phase that this task is part of.
61	"Task AUX4/TEXT4"	text	n	n	Task ID of the Phase that this task is part of.
62	"Task AUX5/TEXT5"	text	n	n	
63	"Task AUX6/TEXT6"	text	n	n	
64	"Task AUX7/TEXT7"	text	n	n	
65	"Task AUX8/TEXT8"	text	n	n	
66	"Task AUX9/TEXT9"	text	n	n	
68	"Assignment Note"	text	n	y	moves to assignment note with creatorname as "ProjectGateway"

Note: A Notes field named "pg_pmTaskID" is inserted into assignment documents created from Project Workbench. This field contains the text value of the unique task id used for synchronization. This may be either the ID or TaskKeyValue upon the INI settings.

The ID field is always available through the Task Aux2/Text2 field which can be assigned to a Notes field by putting it in the Field Map. This would only be needed if you are using the TaskKeyValue for synchronization. (TaskKeyValueAsID=1).