Managing Schedules Using Microsoft Project with Clarity

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Introduction

Audience

The intended audience for this document is as follows:

- Project Manager
- Project Administrator/s

It is assumed that the audience is familiar with Microsoft Project, COMPANY-A Processes, and has attended the Managing Projects in Clarity course.

Objectives

The objectives of this document are as follows:

- Describe changes in building and maintaining a Microsoft Project schedule with Clarity
- Identify and describe best practices for Microsoft Project schedule maintenance in order to work best with Clarity

About this Document (Inclusions)

Following the guidelines and directions in this document will ensure that the management of projects meets the minimum requirements in order for Microsoft Project to behave in a consistent way and be compatible with the Clarity product.

This manual assumes the reader has a basic knowledge of project management, fundamental project management skills and an understanding that COMPANY A Project Management Standards are to be followed when managing projects at COMPANY A. The manual is not intended to provide Clarity end-user training.

Other Clarity Documents (Exclusions)

Directions and information for the following audiences and activities are not included in the Managing Schedules in Microsoft Project and Clarity document. Links to more information are provided:

- Basic MSP skills
- Converting BP-Engine plans to Clarity go to >insert link<
- PM Process at COMPANY A, that interact with Clarity- go to >insert link<
- Managing Project Controls (risks, deliverables), etc. - go to >insert link<
- Resource managers and how Managing Resources- go to >insert link<
- Project Management Office (PMO)- go to >insert link<
- User Guide to Reports and Portlets
- Technical help – go to:

Working with Clarity & Microsoft Project

When using Microsoft Project with Clarity, the majority of Microsoft Project (MSP) functionality is still available. MSP will still be used to create, import and maintain your project schedule. However, the schedule will now be saved within Clarity, a database and project repository. The MSP schedule must now be opened via Clarity and then saved back into the Clarity database. Changes made to the Microsoft Project schedule, once saved to Clarity, will be reflected in both systems.

Clarity and MSP are both views of the data. Some data is not displayed by Clarity but is still retained in Microsoft Project and can still be viewed via MSP. For example, MSP will let you set and save multiple baselines, but Clarity will not. The same is true of Clarity. Clarity owns system and tracked data such as actuals, resource calendars, and cost. Any cost information updated in the MSP schedule will be lost when saved back into Clarity.

Changes to Using Microsoft Project

The following are features/functions in Microsoft Project that cannot be used in conjunction with Clarity.

Feature	Notes
Changing Resource Assignment Unit %	When assigning a resource to a task, you can indicate the % of their Max % units to assign to the task. This value should not be changed since it can change the value for the entire project. Let it default to 100% when assigning to task. (Still exploring)
Modifying Project Calendar	The project calendar is controlled via Clarity. You may adjust the MSP project, or a resource's MSP calendar to determine 'what-if' scenarios. However, any changes you make to MSP calendars will not be saved back to Clarity. Changing the Clarity Resource Calendar will update the MSP project when it's opened via Clarity.
Adding Resources to Project	Any resources that you need should be added to the staff roster of your project in Clarity. Do not be tempted to create any new resource in MSP. When saving the schedule to Clarity, if the system encounters a resource that doesn't exist in Clarity, a warning message will appear and you will be unable to save your project. You may also add a role as a place holder in the project. If a resource doesn't exist in Clarity, contact CSS.
Assigning Resources to Summary Level tasks	Clarity doesn't support resources assigned to summary level tasks. MSP will allow this type of assignment, however you will not be able to save the project back to Clarity.
Creating dependencies	MSP allows dependency links between summary levels. However, you must create any dependencies at the lowest level of the WBS for your project to save to Clarity.
Effort Driven Tasks	Clarity does not support this feature. The default for new tasks should not be effort driven and each task on the work-plan should not be Effort Driven.
Recurring Tasks	Clarity does not support this feature.

Key Microsoft Project Terms

The following terms are important to understand to work with Microsoft Project and Clarity.

Field	Description
Duration	The total span of active working time for a task. This is generally the amount of time from the start to the finish of a task
Work	Actual Work + Remaining Work
Actual Work	Hours already booked to the task. This value is only entered via Clarity Time
Remaining Work	Estimate to Complete. How many additional hours are required to complete the task
% Complete	PM controlled % complete of the task. When actuals are entered via Clarity Time, this value is automatically set to 1%.
% Work Complete	Calculates percentage based upon Actuals Work and Remaining Work. Formula is *100 *Actual Work / (Actual Work + Remaining Work)*
Max Units	Percentage of the resource's availability on the project
Type (Task Level)	• When a task is set to Fixed Work, the amount of work remains constant, regardless of any change in duration or the number of resources (assignment units) assigned to the task. • When a task is set to Fixed Units, the number of assignment units remains constant, regardless of the amount of work or duration on the task. • When a task is set to Fixed Duration, the duration for the task remains constant, regardless of the number of resources (assignment units) assigned or the amount of work.

Microsoft Project Settings

Scheduling behavior of MSP is governed by various internal option settings. The following table outlines the settings that must be set in MSP to ensure that the interface with Clarity works properly. After these settings have been changed on your PC, click the **Set as default** button to ensure that the settings will be retained.

Settings that are not identified in the following table can be altered based on personal preference.

Project Settings Table

Tools/Options - Calculation Tab	**Setting**
Calculation	Automatic
Calculate Multiple Critical Paths	Should be checked
Updating Task Status updates resource status	Should not be checked
Edits to total task % complete will spread to the status date	Should not be checked
Tools/Options – Schedule Tab	**Setting**
Duration	Days
Work	Hours
Default Task Type (for Clarity time users)	Fixed Units
Default Task Type (for non-Clarity time users)	Fixed Duration
New tasks are effort driven	Should not be checked
Tasks will always honor their constraint dates	Should be checked
Tools/Options – View Tab	**Setting**
Date Format	E.g. Tue 11/11/03
Show Summary Tasks	Should be checked
Show Outline Symbol	Should be checked
Indent Names	Should be checked
File/Properties – Summary Tab	**Setting**
Title	Should contain less than 35 characters

Project & Task Properties Mapping

In addition to the settings above, Clarity reserves fields in MSP. These fields should not be modified to ensure that the interface works properly.

For more information about field mappings, please reference the *Clarity.7.0.2 Technical Reference Guide.* These major field mappings are as follows:

MSP Gantt Chart Field	**Clarity**
Text1	Holds the Clarity Task ID (WBS#)
Text2	Holds the Clarity Guidelines URL passed to MSP from the Clarity system
Text3	Clarity unique ID for the task
Text4	Clarity uses this during the load and saving of a schedule
Text5	Used to store the Charge Code
Text6	Used to store Category data at the task level
Flag1	Used to indicate whether WBS object is a “Key Task” in Clarity
MSP Resource Properties	**Clarity**
Resource Name	Maps to the resource name in Clarity
Initials	Maps to the Clarity Resource ID for the resource
Text3	Clarity Unique ID for the resource
Text5	Maps Assignment Resource Role
Email	Email
MSP Assignment Properties	**Clarity**
Text3	Maps to the unique ID for this assignment within Clarity
Number1	Maps to the resources task Pending Estimate within Clarity
Number2	Maps to the resources task Pending Actuals within Clarity

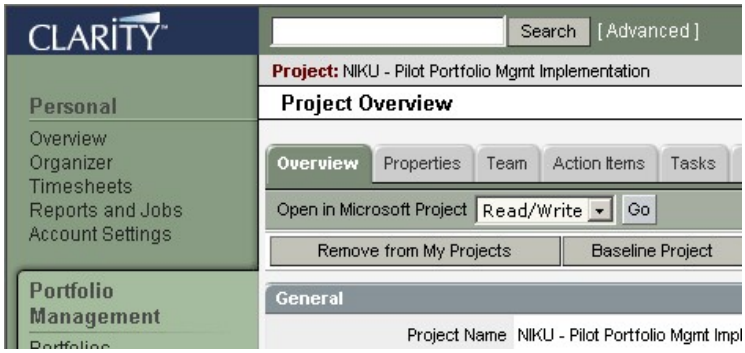
Opening a Project Schedule

There are two ways to open a project schedule in Microsoft Project. A project may be opened directly from the **Project Overview** tab within Clarity. A project also may be opened by first opening Microsoft project, and then using the Clarity integration toolbar. When a project schedule that contains sub-projects schedules is opened, the sub-project schedules are also opened in MSP.

Opening a Microsoft Project Schedule from Clarity

Open a Project from within Clarity:

1. Navigate to the **Project Overview** page for your project.



Note: A schedule in Microsoft Project may be opened from the Clarity Overview page in two modes:

Read/Write – Allows the user to view, edit, and save changes to the project.
- Obtains a lock on the project which means that other users can only open in read-only mode.
- The Lock is released upon Save and Close or if explicitly dropped.
- Saving locally and closing will prompt to keep the lock.

Read Only – Allows the user to only view the project plan.

2. Select **Read/Write** or **Read Only** from the **Open in Microsoft Project** dropdown box at the top of the page. Click the **Go** button to open the project.

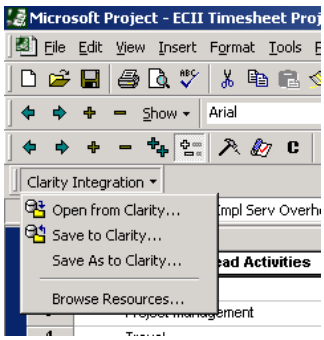
   Note: If the drop-down box is disabled, you have only read- only access. Users who need read/write access should first contact the Project Manager. The Project Manager will contact PMC Tools.

3. The Open from Clarity dialog box appears and displays information on the progress of the download. Microsoft Project will open and the project schedule appears. Depending on the size of the project this process may take a few moments.

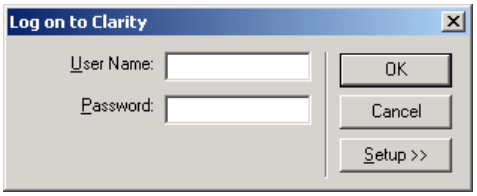
Opening a Project Schedule from within Microsoft Project

To Open a Project from Microsoft Project:

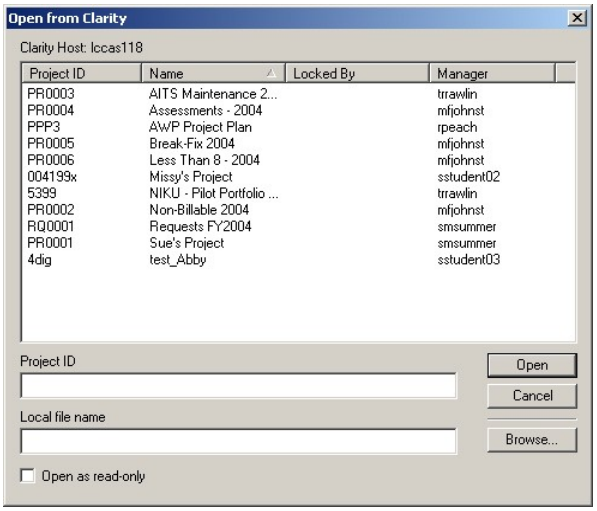
1. Open Microsoft Project. Click on the Clarity Integration toolbar and choose the **Open from Clarity** link.



2. If you are not already logged into Clarity, the Log on to Clarity dialog box appears. Enter your **User Name** and **Password**. Click **OK** to continue.



3. The Open from Clarity dialog box appears. Only those projects for which you have read/write or read-only rights will be displayed. Click on the project to open and click on the **Open** button.



4. The Open from Clarity dialog box appears and displays information on the progress of the download. Microsoft Project will open and the project schedule appears. Depending on the size of the project this process may take a few moments. Once the project has been opened, the schedule may be updated as necessary.

Developing the Schedule in MSP

Initiating a New Project

Project shells will be created in Clarity by the PMO. Please refer to the COMPANY-A PM Processes document for more information.

Base-lining a Project Schedule

A baseline is defined as the original planned schedule saved for later comparison. The baseline includes the planned start and finish dates of the various tasks and assignments with their planned costs. Each Microsoft Project file can have only one baseline.

Projects can be base-lined only by the appropriate Project Management Office. If you are IT, contact WMP.

Note: Project managers should not baseline the schedule in MSP. Base-lining in MSP can cause data inconsistencies between MSP and Clarity.

Creating Project Dependencies

You can set up cross-project dependencies (through MSP), however you must have the rights to view the predecessor project and read/write access to the dependent project.

Delaying a task in the predecessor project in MSP will NOT automatically delay the dependent task in the dependent project. The dependent project needs to be opened in MSP and there (depending on MSP settings), it will move and then it can be saved back to Clarity. Additionally, do not create dependencies to summary tasks.

Adding a Task via MSP

Add Tasks as usual in MSP (Click Insert button or Insert New Task). Be careful not to add Work estimates until you can assign that Task to a Resource or Role.

For plans tracking time in Clarity, assign Resources to Tasks as usual.

For Resources that won't be tracking time in Clarity, add the Resource to the task, but make sure you zero out the Remaining Work for that Resource. So, if a task has both Clarity Time and non-time sheet users, the Resource who will be tracking time in Clarity should have work and the non-time sheet user should not.

Adding Resource(s) to the Project Schedule

Adding New Users or Roles to Clarity

New users must be added via Clarity and not through Microsoft Project (MSP). All resources must be created outside of MSP. If you are building a project schedule and cannot find the desired resource in the system, please contact Customer Support Services at HELP (4357) or (external number) (insert menu options). Info needed on hand:

- Resource First and Last Name
- Resource ID (3-4)
- Email Address
- Employment Type (FTE, Part Time, Statement of Work, Contractor, Outside Company)
- Available hours per day (default is 8)
- Timesheet enabled?
- Resource Manager
- OBS (Dept # and Name)
- Hire Date

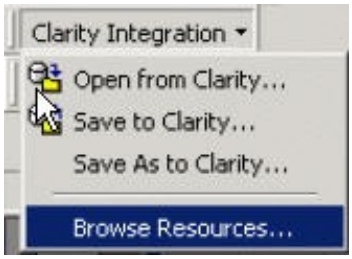
Adding Roles or Resources to the Schedule via Clarity

The fastest and easiest method to add users to your project schedule is to add them in Clarity as Staff on your Team tab. Once you open the schedule after that, the team members will appear as Resources that can be added to Tasks.

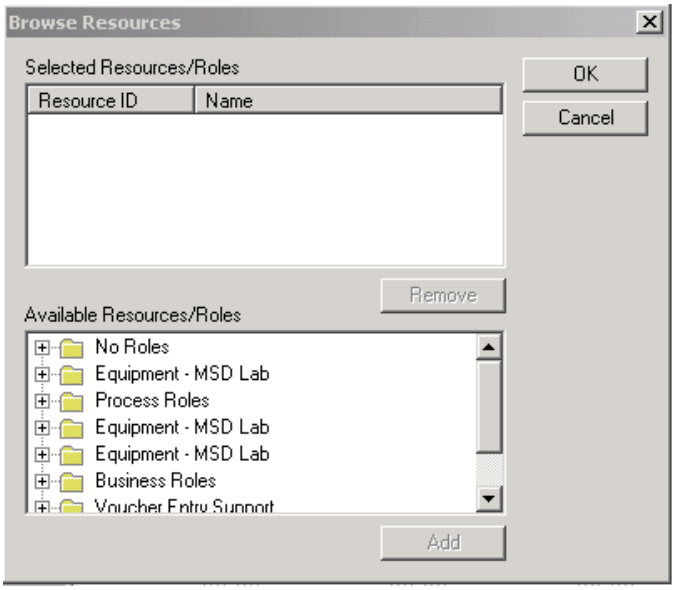
Adding Roles or Resources to the Schedule through MSP

Adding Roles or Resources to your project schedule via MSP is not the preferred method, but if you are already in the schedule, you can add them here. To add resources to the project schedule, use the Browse Resources function located on the Clarity Integration drop down within MSP. This method is described below:

1. Open the Schedule in MSP.
2. Navigate to the Resource Sheet view in MSP.
3. Click on the Clarity Integration toolbar and select Browse resources.



4. The **Browse Resource** Window will open and you can use the folders at the bottom of the page to find the required resource. The Resources will be grouped by role.



5. Use the + signs to open the folders and search for resources. Once you find the resource, highlight the name and click **Add**.
6. The selected resource is added to the **Selected Resource/Role** area at the top of the box.
7. Click **OK** and the resource will be available for staffing and will be listed on the **Roster > Staff** page as soon as you Save to Clarity.

Warning: If you try to add a resource to your schedule without using Browse Resources, you will be unable to save your project back into Clarity.

Assigning Resource(s) to a Task

There are two ways to assign a resource to a task in MSP. To assign a resource to a task, use either the Assign Resources button  or the drop down box in the Resource Names column.

Warning: Do not type the name of the person in the Resource Name column. This will cause a resource to be added to your resource sheet and the schedule will not save back into Clarity. The following error message will occur if the resource name is typed:

Error Message – "Resource [XXX] not found"
Resolution – Delete the resource from the task and from the resource sheet. Save back to Clarity.

Error – "One or Duplicate Resources Found. Cannot Save"
Resolution – Check the Resource Sheet view in the project to see if there are duplicate occurrences of the Resource Initials of one or more resources.

Removing Resource(s) from a Task

Once a Resource has tracked time to a task via Clarity Time, you cannot remove the Resource from the Task and you cannot Delete the task. You can add a new Resource to the task and move the remaining work/ ETC to the new Resource. You cannot remove the resource from your project schedule if they have booked time to the plan.

Removing Resource(s) from a Project Schedule

If your Resource has not yet has tracked time to a task in your project schedule via Clarity Time, you can delete the Resource name from the task in MSP as usual. If needed, you can also go into Clarity and remove the person as Staff and Participant.

If a Resource has no Remaining Work or allocation to the project, the project's tasks will fall off the Resource's Clarity Time view.

Allocating Resources

Allocation is the percentage of time a resource is assigned to the project. This percentage can then be computed into hours based on the resource's availability. Allocation does not happen at the task level but rather it is a percentage or numbers of hours for the entire project. Allocation is determined by the following factors:

- The start and end date of the resource on the project.
- The number of hours that resource works in a day.
- The percent allocation of that resource on the project.
- The resource's non-working day calendar.

Warning: Do not assign a resource above the maximum units.

Maintaining the Schedule in MSP

You will need to create dependencies and do automated scheduling in MSP. For simple plans, some of the following can be done in Clarity but get a display of 20 tasks at a time. For larger plans, you will need to do the following via MSP.

Review Pending ETC and update
Review Pending Actuals and request revisions of RM or Resource
Review Actuals Posted
Update Overdue Tasks
Mark Tasks Complete

Timesheet Actuals Exceptions Defined

Each week, team members that belong to IT are required to fill out timesheets by Monday at noon. These timesheets will be reviewed and approved by the appropriate resource manager by COB on Monday. After approval, the timesheets post to the MSP schedule on Monday night and Wednesday night at 8 p.m.

- If a Resource entering Time feels that s/he has completed a task in less than the ETC hours, s/he can make the Pending ETC = 0 in the Timesheet. The Project Manager can decide whether to make the ETC = 0 for the Task and mark the Task completed.

- If a Resource entering Time feels that s/he needs more time than the ETC hours, s/he can alter the Pending ETC = 0 in the Timesheet to reflect that. The Project Manager can decide update the ETC based on the recommendation.

For projects with users who are not tracking time using Clarity, updating actuals for those users manually is an option. Most projects with non-time sheet users as Resources will be set up to just track Tasks and Resources and will not carry Work estimates.

- Actuals for a resource on a task can be put in MSP directly, as long as the resource is NOT enabled for 'Clarity' time tracking. These actuals will make it back to Clarity. For such cases, when you mark 100% complete, MSP also fills in the ETC hours into the actuals – but that is solely an MSP function. Marking a task 100% complete in Clarity will NOT put in the actuals equal to the ETC.

Pending ETC and Pending Actuals

To view Pending ETC, or new remaining estimates, suggested by the Team Member, run the Exceptions Actuals/ Pending Portlet or you can view Pending ETC (Number 1 field) on the Gantt Chart directly in your MSP schedule. You can compare this to the Remaining Work (ETC) that you have previously planned. Update where you see changes need to be made by typing over the Pending ETC with what you want to be updated to Remaining Work/ ETC. Click on the Macro. Steve is checking on macro to accept the viewed Pending ETC and views to use.

The Pending Actuals are what Resources have entered on their Clarity Time. The Pending Actuals are saved, submitted, or approved actuals in the timesheet that have NOT yet been posted. Pending Actuals are stored in the Number2 field on the Gantt Chart view in MSP. You should review these and notify the Resource or Resource Manager of any updates that need to be made.

Reviewing Posted Actuals

After timesheet Actuals are reviewed and posted, it is the project manager's responsibility to review his/her plan. Timesheet updates will move work forward and backward based on the team members' posted hours.

You can view these updates via Task Usage and display the Actual Work column for the week you are reviewing. Compare the Actual Work and the Remaining Work/ ETC.

Examples of posted timesheet actuals are as follows:

1. Team Member A was allocated 25% to a 20 hour task. The task is scheduled to take 2 weeks. Team member A posts 15 hours to the first week. Therefore, the task end date pulls in by two days.
    a. Project manager can either add more work to the task or can decide to leave the end date as it stands.
2. Team member B was allocated 75% to an 80 hour task (6 hours/day until complete). Team member B posts 15 hours to the first week of the task. Therefore, team member B is behind schedule. This will cause the task end date to push out by 15 hours.
    a. Project manager can either take hours off the task and pull the end date back in or he can leave the end date as it stands.
    b. Any successors will also be rescheduled if the end dates are pushed out.
3. Team member C was scheduled to work on a 10 hour task next week. However, he booked 16 hours to the task this week. Therefore, the task has no ETC left and the end date pulls in.
    a. Project manager can change the task to 100% Complete or can push the end date back out by adding more remaining work to the task.

Updating Overdue Tasks and Bringing in Future ETC

Use the overdue filter in MSP to identify any past due task (tasks where finish date has passed). If a task has been completed, it should be updated accordingly. If a task will continue past the week, add Remaining Work/ ETC to push out the finish date to the correct date. As of Thursday of each week, there should be no overdue tasks.

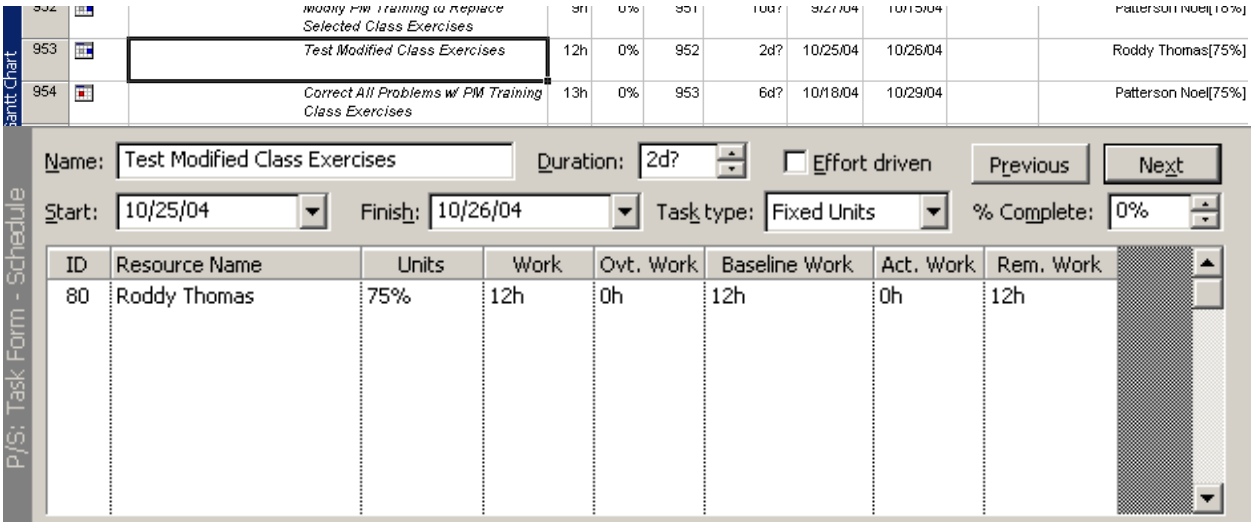
If a Resource was scheduled to complete a task this week, but did not book the full estimated time in Clarity Time, ETC will exist on that task and Clarity will push the Finish date out to accommodate the work remaining. The PM will need to mark the task complete by bringing in the Finish date and marking the % Complete to 100%.

Marking Tasks Complete

In order to prepare to update tasks, go to the Gantt Chart and select Window/Split. Then, in the bottom pane of the window, right click and select P/S: Task Form and then Resource Work.

Closing a Fixed Units Task with Actual Work:

1. Type over any remaining work with a zero. Click Ok.
2. The Finish date will pull in to reflect the end of the Actual work performed on that task by the Resource. (Remember that Clarity views the Task as the wrapper around the Work).
3. Mark the % Complete as 100%. Click Ok.



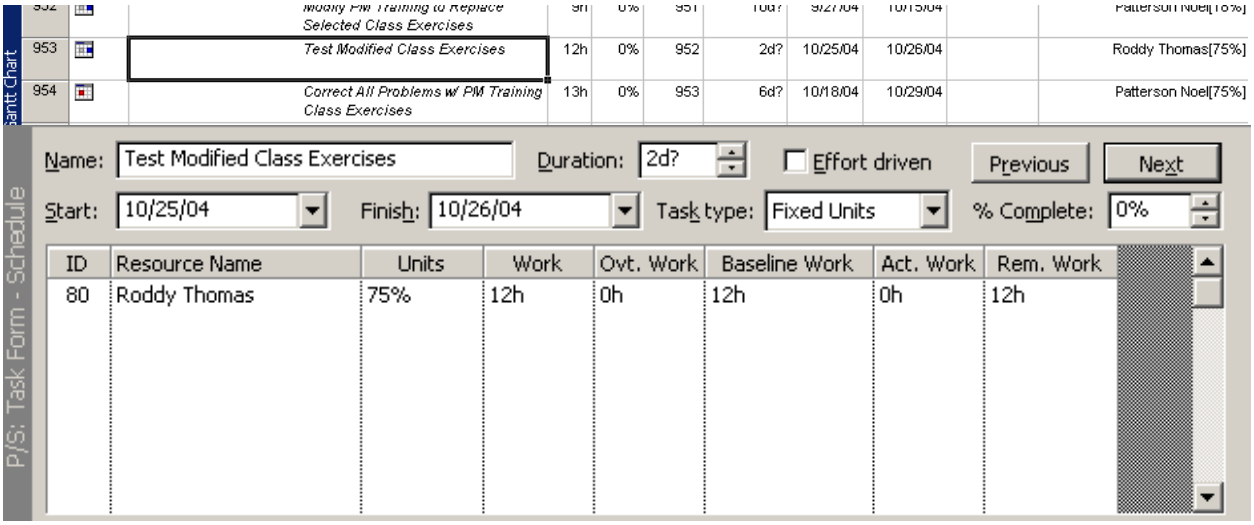
If you want the Finish Date to be different than the Fixed Units task allows,

1. Change Task Type to Fixed Duration. Click Ok.
2. Update Finish date by keying in the date the task finished. (Make sure this date is not in the future).Click Ok.
3. Mark the % Complete as 100%. Click Ok.

Closing a Fixed Duration Task with Actual Work:

1. Type over any remaining work with a zero. Click Ok. The Finish Date should remain the same.
2. Mark the % Complete as 100%. Click Ok.

Closing a Task that has no Actual Work



If the Resource should have booked time to this task, consider getting them to revise their submission. If the work was logged under another task, but you still need this task and don't want it to be a milestone, follow these steps:

4. Type over any remaining work with a zero. Click Ok.
5. Change Task Type to Fixed Duration. Click Ok.
6. Update Finish date by keying in the date the task finished. (Make sure this date is not in the future).Click Ok.
7. Mark the % Complete as 100%. Click Ok.

Note: If you change the Finish Date to last Thursday and then Actuals post and time was put on the task, the Finish Date will update to be Friday. Clarity will revert the task to 99% complete and you'll need to update it again.

Closing Tasks

Note: If remaining work is not set to zero when the task is marked complete, MSP will move the Remaining Work/ ETC to Actual. When you reopen your plan, Clarity will revert to the Actual work and will mark the task 99% complete.

Saving a Project Schedule to Clarity

When working with a project schedule you may save the file locally at any time, or set Microsoft Project to make periodic automatic saves.

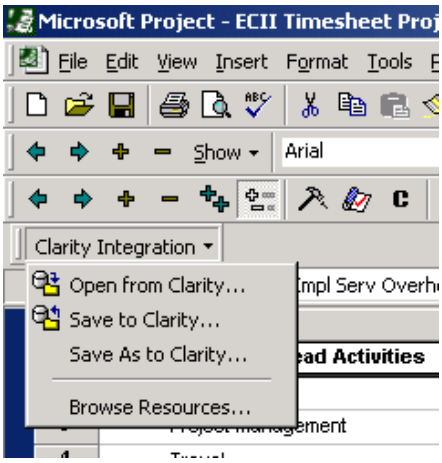
At any time while working with the project schedule, you may save the project back to Clarity. However, at the end of a work session, you MUST save the project in Clarity in order for the changes to be applied to the database.

Management can access project information in Clarity at any time. The most current project information should always reside in Clarity. You are welcome to work offline, but make sure you save… back to Clarity.

IMPORTANT: If you do not save changes made in Microsoft Project to the Clarity database by performing the following procedure, the changes will not be reflected in Clarity.

Saving Changes to Clarity

1. Make all desired changes to the project schedule in Microsoft Project.
2. Save the project file locally using the **Save** function within Microsoft Project.
3. Click on the **Clarity Integration** toolbar and select **Save to Clarity** to save the changes to the Clarity database.



WARNING: Do NOT use Save As to Clarity when updating an existing Clarity project. This is for PMO use only. This option will try to create a new project in the repository and could cause inconsistencies in your project plan.

4. A dialog box will open and the progress of the save will be displayed.

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Working Offline

Clarity Work-plans are can be edited in an off-line disconnect mode through MSP.

Steps to take to Work Offline

1. With file open in MSP (connected to repository), select File, Save As and save the file locally on your computer.
2. Close MSP
3. Clarity will detect that you have not made a save to the system and will prompt you whether you wish to retain a lock on the project schedule.
    a. Click 'Yes' to retain your lock on the schedule permitting you to work off-line.
    b. Click 'No' and any changes you make will be lost
4. To edit, navigate to your project and open it in a disconnected mode. Do not login when prompted. Click Cancel. Use the recent file directory within MSP to find your file instead of browsing your hard drive.
5. Make all changes necessary and save the local file.
6. To save any changes made off-line back to Clarity, open the particular MSP, login to Clarity and click **Save to Clarity** in the Clarity Integration Toolbar.
7. All changes will be saved to the database.

Warning: Do not use the Save As to Clarity option on the drop down list. This is for PMO use only. This option will try to create a new project in the repository and could cause inconsistencies in your project plan.

Using MSP Quick Reference Guide

⊕ **Keep your eyes peeled!!!**

- Clarity assumes the length of work being done is equal to the length of the task. If you have a task that covers two months and is Fixed Units, but a resource puts time to only one week, Clarity will correct the task length to the dates work was performed.
- Plan to the level at which you intend to track work. Use tasks that reflect real work to which resources will track time.
- Use Milestones to identify checklist type items.
- Clarity does not mark tasks complete if the hours have been reached or ETC is manually changed to zero. The Work Complete is then 100%, but the Complete task must be manually changed to 100%.
- Setting task duration to zero with no remaining work automatically converts it to a milestone. You need to remove the Resource if a task changes to a milestone. If it needs to remain a Task, change it to Fixed Duration.
- Base-lining must be requested through the PMO. MSP will allow you to save multiple baselines, but reporting on the Baseline is driven through Clarity and only the PMO can save or update that Baseline. For more information see Base-lining section of this document.
- Remaining Work/ ETC on tasks that were due during timesheet period will be pushed out to the next period. PMs review Actuals Posted and zero out work and bring in Finish Date and mark those tasks complete.
- If a task has been started, Clarity automatically sets your % Complete to 1%.
- Do not delete tasks with Actuals posted to them. This will cause the tasks to return to your plan under the Deleted Tasks summary task.
- If you do delete a task, you can drag and drop the task out from under the Deleted Tasks summary and put it back into the schedule.
- Clarity doesn't accept tasks with work and no resource or role. Wait to add the work estimate until you know a role or resource.
- Do **not** Cut and Paste in MSP, use Drag and Drop to move tasks around. Cutting and Pasting creates orphan tasks, will add duplicates of the tasks when you open via Clarity and creates new tasks Ids.
- Do not add Predecessors or Resources at the Summary Level (look for **Bold-Formatting**).

PMs weekly check on allocations (was 703 report). How to do this now?

Weekly Tasks:
Review Pending ETC and update
Review Pending Actuals and request revisions of RM or Resource
Review Actuals Posted
Update Overdue Tasks
Mark Tasks Complete