Reference Guide for using Microsoft Project with Clarity

The Clarity Team recommends using Open Workbench with Clarity. The benefits of using Open Workbench, and additional information on the points in this guide. are contained in "Managing Clarity Project Schedules Using Microsoft Project", available via the Clarity site on MAX. This quick guide is provided for those who must for any reason use MS Project. It is recommended that prior to using MS Project with Clarity, users read "Managing Clarity Project Schedules Using Microsoft Project".

Tasks
- Clarity assumes the length of work being done is equal to the length of the task.
- Clarity does not mark a task "Complete" if the hours have been reached or the ETC becomes zero. The task % complete must be manually updated to 100%.
- Changes to Actual Work will be lost on save unless the assignment is not "tracked" in Clarity
- Setting a task duration to zero with no remaining work automatically converts it to a Milestone
- Do not have milestones with a duration other than one day and don't assign resources to milestones
- Clarity automatically sets the % complete to 1% for started tasks.
- Do not delete tasks that contain actuals. The return to your plan under a "Deleted Tasks" summary task.
- Don't add a work estimate until you are ready to assign a role or resource. Clarity won't accept tasks with work but no role or resource.
- Start-No-Earlier constraints will often appear on tasks, for various reasons.
- Real constraints take precedence over implicit constraints. If a task has a SNE for Monday and you change its start in Clarity to Tuesday, it will have a Monday constraint (and schedule)
- Tasks can become re-scheduled if the project start date changes (this can happen implicitly)
- Task % Complete is not always exported
- Unassigned work on tasks is not saved to Clarity, but is retained in MSP, which can cause a work total mismatch
- Remaining work on non-workdays is not allowed in MSP – it will be lumped to the next working day
- Recurring tasks are not supported; they revert to an ordinary task in Clarity
- Blank task names are not allowed

Summary Tasks
- Do not add Predecessors to Summary Tasks
- Do not use a Summary Task to add up the Work
- Summary Task % Complete is derived in MSP
- Do not assign resources to Summary Tasks

Timesheets
- Remaining Work / ETC due in a timesheet period will be pushed out to the next period.

General Tips
- Plan at the level you intend to track work. Use project tasks that reflect real work
- Clarity does not enforce constraints, dependencies or calendar/work-time definitions
- Do **not** cut + paste in MSP, use drag + drop. Cut + paste creates orphan tasks and will duplicate tasks in Clarity.
- The sum of labour effort in MSP will usually, but not always, match the sum in Clarity.
- Changes to calendars & resources impact scheduling, but will not update Clarity
- Resources are matched on Initials = ID
- Beware of "Updating Task Status Updates Resource Status" flag.
- You cannot delete assignments with actuals.
- MSP-specific costing options (pro-ration, overtime rate, cost rate tables, time-varying rates, task cost overrides) are retained. Using these options will cause costing mismatch between MSP and Clarity and should be avoided.
- Multiple baselines are not supported.
- Clarity supports minute-precision schedules, but only day-precision value is displayed when viewed in Clarity. Edits in Clarity will snap to full day.
- Don't use Resource Levelling – it only slides tasks around
- Don't use Front loaded, Back loaded, Turtle
- Excessive use of Contour loading patterns slows the system
- The MSP Interface is not auto-numbering aware
- Do NOT password-protect project plans