

Afinion



Manual

**Afinion Project-Viewer
For Microsoft Project and SAP PS
Version 3.0
Setup and Utilisation of Time Reporting**

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General

To utilise time reporting only makes sense, if it covers the entire team and all its activities. As time reporting provides important information for the assessment of your projects, the standard mpp format of Microsoft Project is not suitable, since it can only contain one project. Time reporting using Afinion Project-Viewer, therefore, requires a database which contains all projects, for which time shall be reported. Several databases may be used for different departments, yet consolidation of the data will then be more difficult.

Databases supported by Afinion Project-Viewer are:

mdb/mpd, the Microsoft Access database or the Microsoft Project database (actually the same with a different extension)

Microsoft SQL Server and the related Microsoft Project Server

Other databases, especially Oracle, would be possible. These are however bound to certain conditions by Microsoft Project. Please contact us, if you are interested.

Resource names can be selected arbitrarily. Decisive for the time reporting is the entry of the Windows user account in the corresponding field in Microsoft Project. For additional information see Chapter 2.3 below.

Time reporting with Afinion Project-Viewer does not require an extensive installation. By extracting the program files into a local folder everything is prepared and can be utilised by the project team members immediately, provided the project data have been saved in a database and the Windows user account has been entered for all resources.

In principle time reporting can be used as a front end for SAP or other ERP systems. To transfer the data correctly however requires some additional steps, that have to be determined in a definition process. Since Microsoft Project does not contain any security elements in this context, these have to be provided by the Afinion Project-Viewer. Please contact us, if you are interested.

Afinion Project-Viewer Time Reporting is compatible with all versions of Microsoft Project 2000 and later. The support of Project 98 is not foreseen, since this version is not supported by Microsoft itself any more.

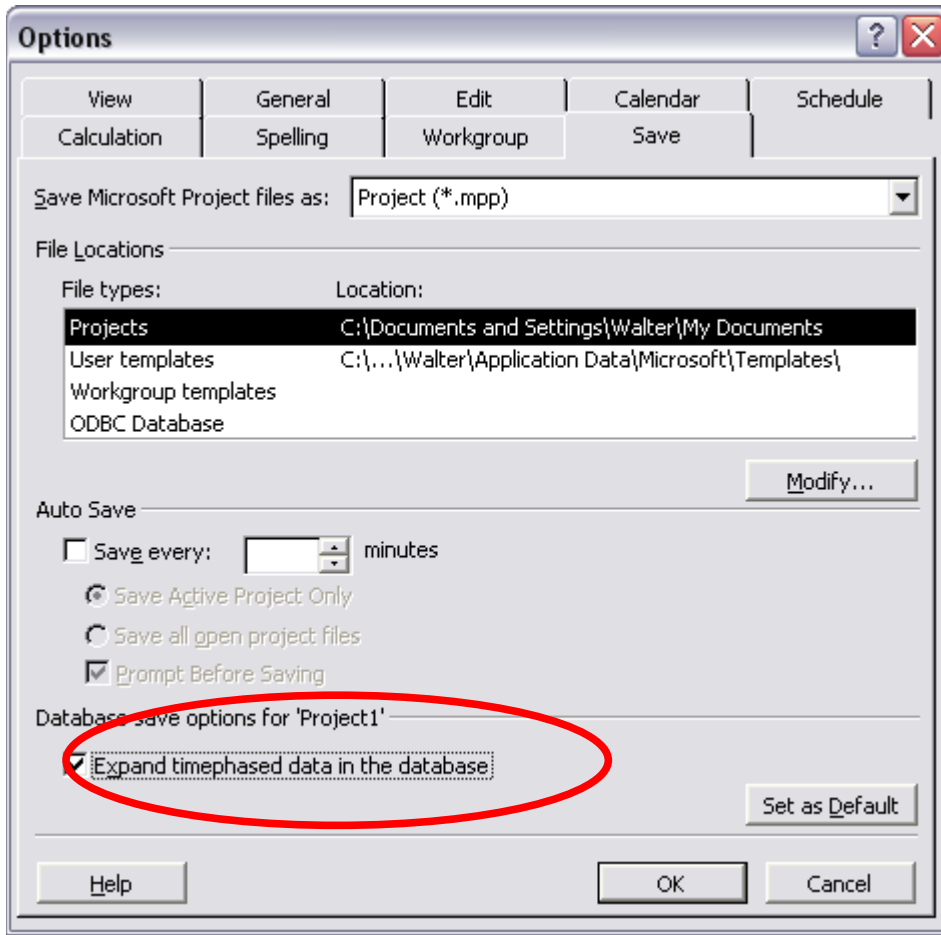
First Steps

Basic Decisions

Once you have decided to introduce time reporting using Afinion Project-Viewer some basic decisions have to be made. Please take your time for this, since the quality of your data will depend significantly on the prerequisites made here. The required steps are described below.

Expand Timephased Data in Microsoft Project

In order to make the data transparent for Microsoft Project and to link them with the activities, in Microsoft Project go to menu *Tools > Options, Register Save* and activate "Expand timephased data in the database". Press "Set as Default" in order to set this option automatically for every new project. This option has to be set before entering any time reporting data.



Entering Windows Users in Microsoft Project

Open Microsoft Project and select the Resource Sheet.

Insert column "Windows User Account" unless a different field has been assigned (see Chapter 2.4, Selection 4)

For domain users enter "Domain\Login", i.e. "MyCompany\MyLogin", for users belonging to a workgroup or with standalone pc's enter "PC-Name\Login", i.e. "MyPC\MyLogin".

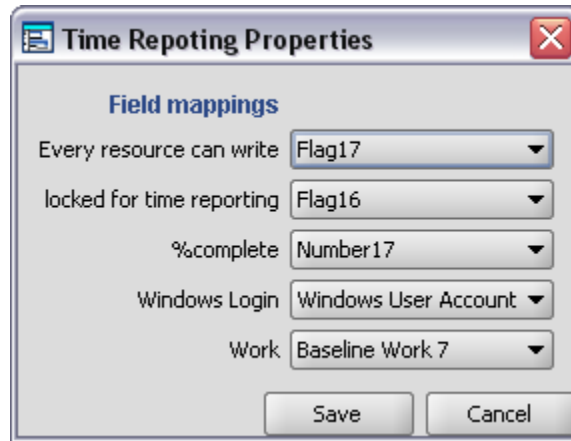
		Resource Name	Windows User Account	Type	Mat
1		Engineer		Work	
2		Domain Tester	Domain\Login	Work	
3		Workgroup Tester	PC-Name\Login	Work	

Field Mapping

Before setting up field allocations, you have to connect the Afinion Project-Viewer with a database. Either create a new, empty project in Microsoft Project and save it in a database or else, if you use Project Server, configure it directly. Time reporting in the Afinion Project-Viewer is completely independent of Microsoft settings. You cannot modify any Web Access data. Note however that the fields you want to use

for time reporting have not been pre-assigned by the project manager. Normally these fields will be free. If not, assign different fields as described below.

- Open Afinion Project-Viewer
- Go to menu *Admin > Time reporting*
- Enter the password (default password is "Apv1!" without quotation marks)
- Select the fields to be used for time reporting in Microsoft Project



These settings have the following properties:

- | | |
|---------------------|---|
| Selection 1: | Every resource can write |
| Default: | Flag17 |
| Properties: | If the project manager sets this field to "no" or empty (default), only the resources assigned to an activity may report work hours to this activity. This setting corresponds to the Microsoft setting in Web Access.
If you have projects where the members should be able to report work hours quickly and instantly to any or selected activities, set this flag to yes. To set the flag for all activities insert the column in a Microsoft Project table, set the value for the first activity to "yes" and then activate the entire column and select "Fill down" from the Edit menu. Now every resource in the resource table may report work hours to these activities. |
| Alternative Fields: | Flag 1 – 20, Enterprise Flag 1 – 20 (Enterprise fields are only available when using Project Server) |
| | |
| Selection 2: | Locked for time reporting |
| Default: | Flag16 |
| Properties: | If this field is set to "no" or is left empty (default), every resource may report work hours to the corresponding activity. If it is set to "yes", nobody – including assigned resources – may report work hours. This feature is useful, when external resources, which do not have access to the time reporting, are assigned to an activity and when an activity is completed and no further hours shall be booked. This also prevents belated bookings. |
| Alternative Fields: | Flag 1 – 20, Enterprise Flag 1 – 20 (Enterprise fields are only available when using Project Server) |
| | |
| Selection 3: | %complete |
| Default: | Number17 |
| Properties: | Every project member can estimate his progress himself and enter it in the time reporting. The program then calculates a |

total progress based on the %complete entered by the individual members and the total number of hours planned by the project manager.

Example 1: Resource A has been assigned 10 h, resource B has been assigned 10 h. Resource A reports 40%, resource B reports 60%. AFINION Project-Viewer now calculates 50% for the activity.

Example 2: Resource A has been assigned 10 h, resource B has been assigned 30 h. Resource A reports 5 h and 50%, resource B reports 10 h and 33%. AFINION Project-Viewer now calculates 37.5% for the activity.

Alternative Fields: Number 1 – 20, Enterprise Number 1 – 40 (Enterprise fields are only available when using Project Server)

Selection 4: Windows Login

Default: Windows User Account

Properties: Defines which field is being used to link AFINION Project-Viewer with Microsoft Project resources.

Alternative Fields: Code, Text 1 – 20, Enterprise Text 1 – 40 (Enterprise fields are only available when using Project Server)

Important: Should you use a different field, i.e. Text1, please note that this is the Text1 field of the resource and not of the activity. To enter the user account you still first have to switch to the resource sheet and insert column Text 1 there.

Selection 5: Work

Default: Baseline Work 7

Properties: Field for consolidated work hours

Alternative Fields: Baseline Work 1 – 10, Number 1 – 20

Important: The Baseline Work fields are used by Microsoft Project to store baselines. We therefore do not recommend using Baseline Work 1 – 5.

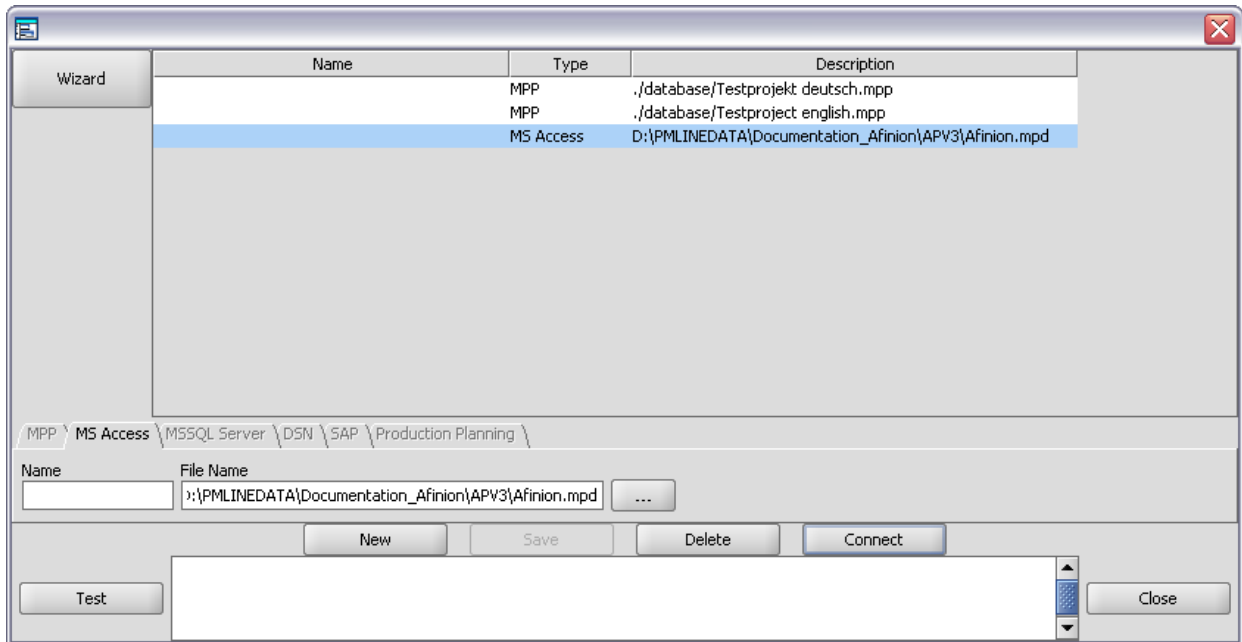
The Baseline Work 1 – 20 fields do not exist in Microsoft Project 2000. Use **Number16** instead!

Using Time Reporting

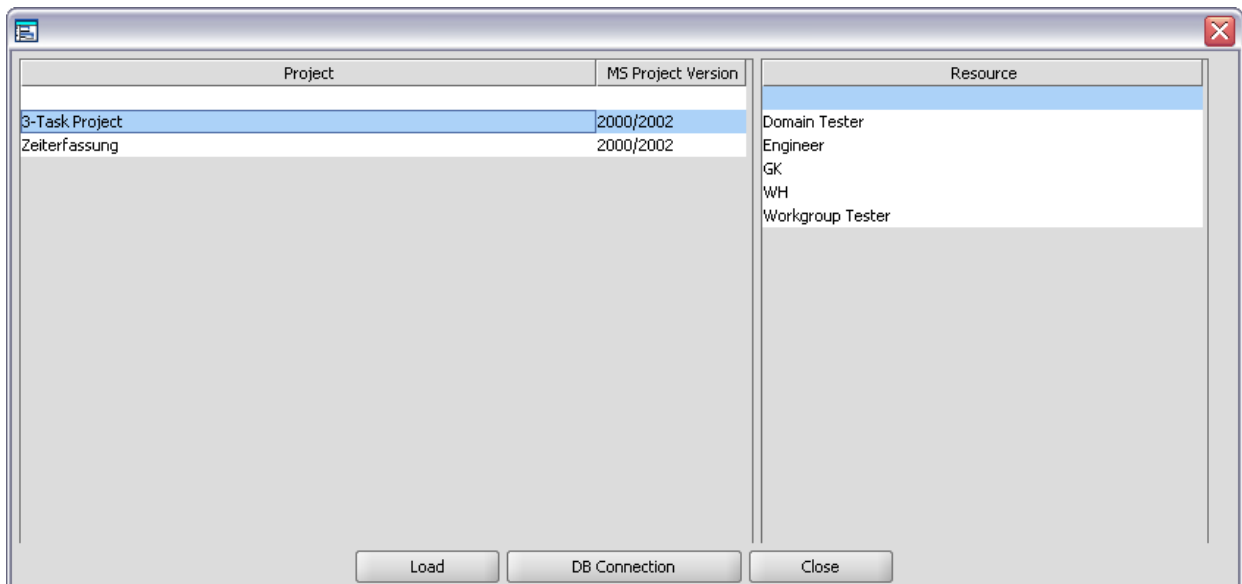
Data Entry

Start Afinion Project-Viewer

Go to menu File > Connection Manager



To open a new project press *New*, select the *MS Access* or the *MSSQL Server* register (as appropriate) and browse for the project database, press *Save*, then press *Connect*.



Now select a project and a resource (blank line = all resources) from the list and press *Load*.

To open an existing project, go to menu *File > Load Project* to open above form directly. Remember: Only *MS Access* and *MSSQL Server* project databases may be used for time reporting.

To report work hours for an activity, double-click on the task. The following window opens:

The screenshot shows a 'Time reporting' dialog box with a title bar containing a close button. The main area displays a weekly calendar for 'KW 50' from Monday, 05.12.05 to Sunday, 11.12.05. The current date, Wednesday, 07.12.05, is highlighted in red. Below the calendar are input fields for work hours: 2.5 for Monday, 3 for Tuesday, 4.5 for Wednesday, and 15 for the total. A '%complete' field is set to 15. Navigation buttons '<<<' and '>>>' are on either side of the input fields. At the bottom are 'Cancel' and 'Save' buttons.

Enter the daily work hours in the fields between the <<< and >>> buttons.

Enter your completion estimate in percent in the field "%complete".

Press Save.

Note: If the above window does not open by double-clicking the task, this may be due to:

- Your login in the field "Window User Account" is missing or wrong.
- The project manager only allows assigned resources and you are not assigned to the selected activity.
- The project manager has blocked the activity.

View Progress in Microsoft Project

The sample project "Afinion.mpd" available from <http://pmline.co.uk/en/downloads> contains the sample view "*Time Report" showing both the standard progress (black bar) and the progress reported in the Afinion Project-Viewer (red bar). The report uses the table "*Time Report". The sample has been set up using Microsoft Project 2000, i.e. the work hours reported are stored in field "Number16".

	Task Name	Duration	Planned Work	Actual Work Hours	Critical Work	% Complete	% Work Progress	Critical Deviation	Resource Names
1	Sample Task	1 w	40 h	13 h		30%	25%		Engineer
2	Your Task	1 w	40 h	0 h		0%	0%		Domain Tester

The table of this report uses the following custom fields:

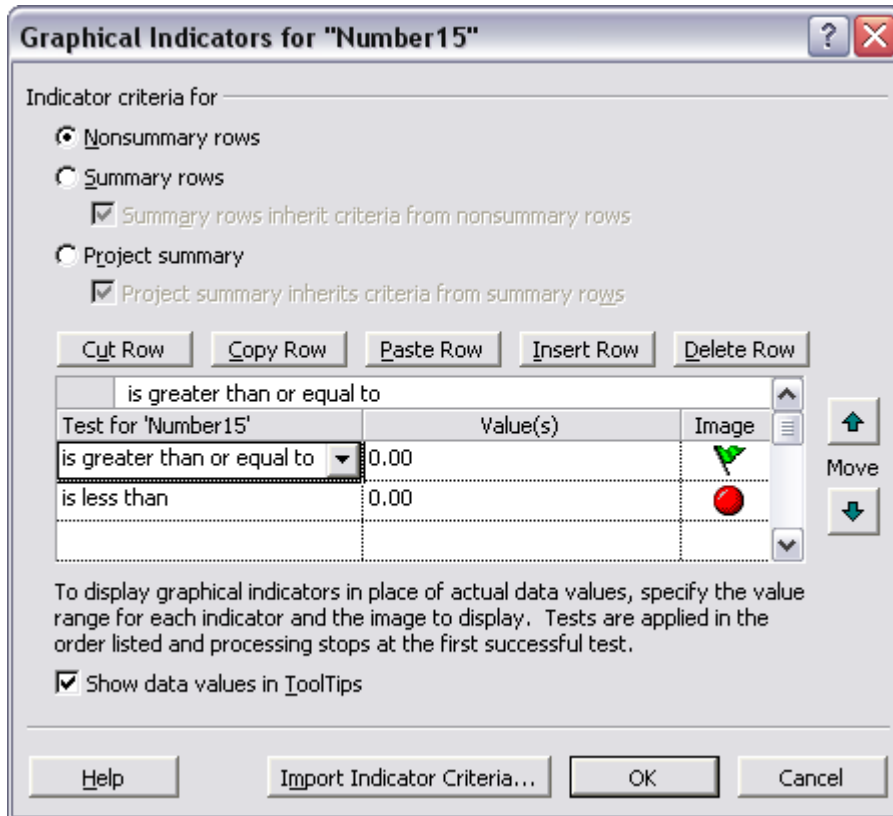
Actual Work Hours (Text16)

Formula: [Number16] & " h"

Critical Work (Number15)

Formula: [Work]-[Number16]

Graphical Indicators:

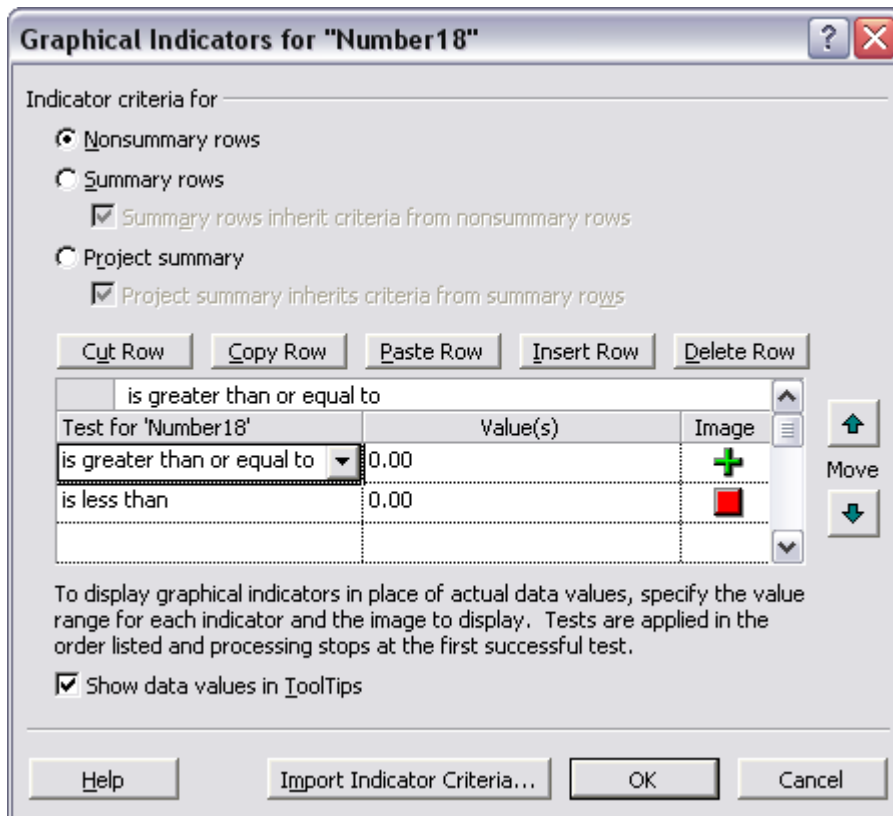


% Work Progress (Text17)

Formula: [Number17] & "%"

Critical Deviation (Number18)

Formula: [Number17]-[% Complete]
Graphical Indicators:



The bar chart contains the custom red work progress bar, which is defined as "from Start to Finish7", whereby

Hidden column (Finish7) Formula:
ProjDateAdd([Start],[Duration]*[Number17]/100)

By using the Microsoft Project Organizer (menu *Tasks > Organizer...*) this sample view together with “*Setup Time Reporting”, the associated tables with the same names and the custom fields can be copied to your Global.mpt and from there to any existing or new project.

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