SCMPP - Project Manager Tutorial

Below are the simple steps to install, configure and use the SCMPP Add-in for Microsoft Project.

This guide refers to version **2.0.0.0** of the SCMPP Add-in.

Contents

# Requirement

Microsoft Project installed.

Ask for and receive the SCMPP license key. In order to receive the license key email us at info@k-sol.it .

Only email with a valid company's domain name will be taken into consideration. Anonymous emails (gmail, ...) will not be answered.

If your company has never used the SCMPP platform, we will provide you with a 30-day free trial with a maximum of 5 resources.

Add-In Installation

➢ Download the SCMPP Add-In from Microsoft Project at:
   http://www.project-timesheet.com/download/ScmppAddInVer2000.zip
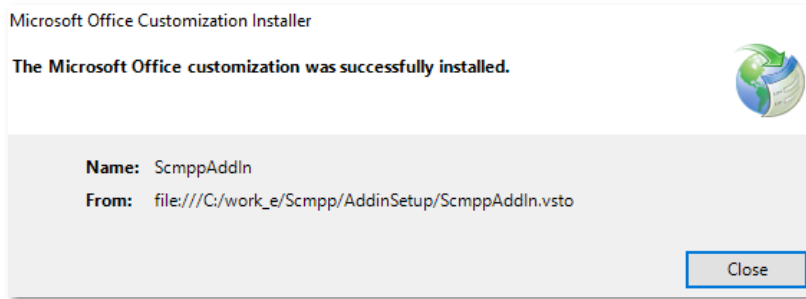➢ Unzip the file. Below the unzipped structure:
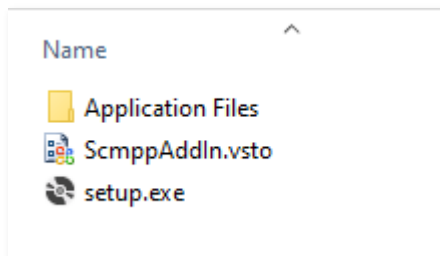
➢ In order to setup the Add-In you have to double click on setup.exe file
➢ Depending on your Operating System you can have the warning below:
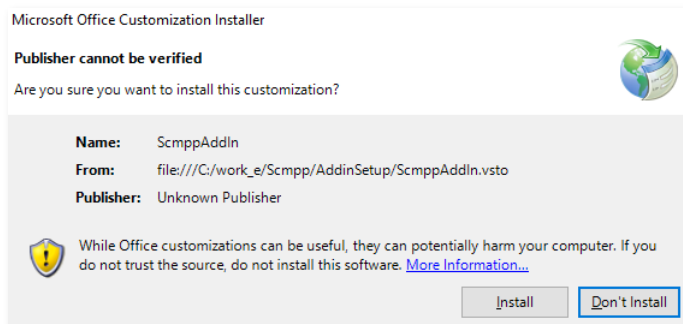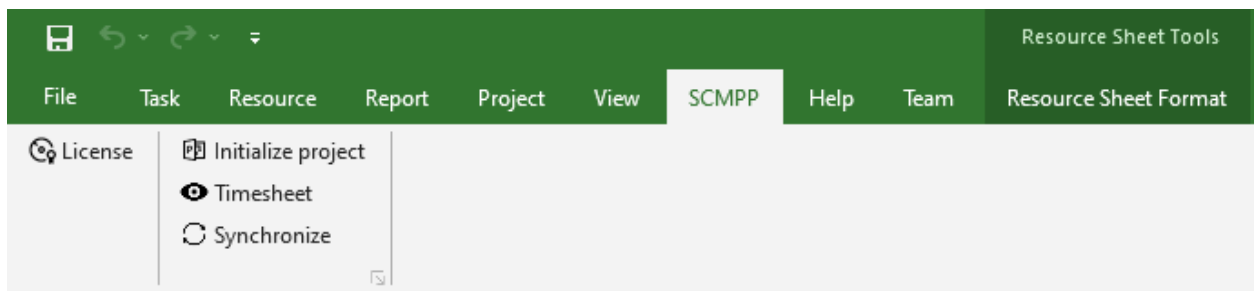

Please ignore the warning and Install the Add-In.

➢ At the end of the installation you can see the screenshot below:
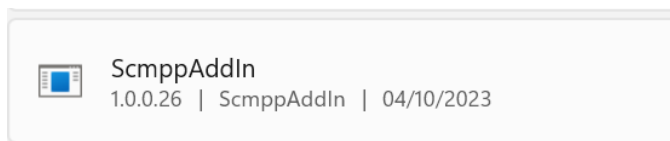

➢ Start Microsoft Project and open a plan, you can see the SCMPP Add-In installed, see the screenshot below:

Add-In Update

In order to update your already installed SCMPP Add-In proceed as follows:

➢ Close Microsoft Project
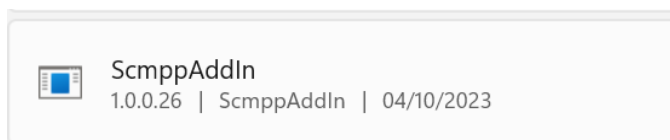➢ Uninstall the entry below from Control Panel->Programs

➢ Install the new version as already described

Add-In Remove

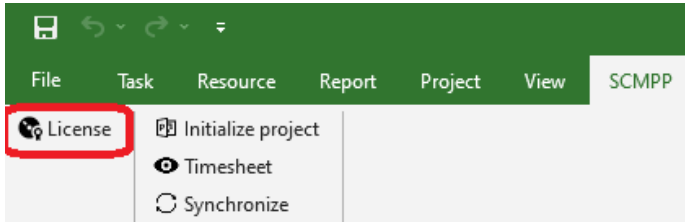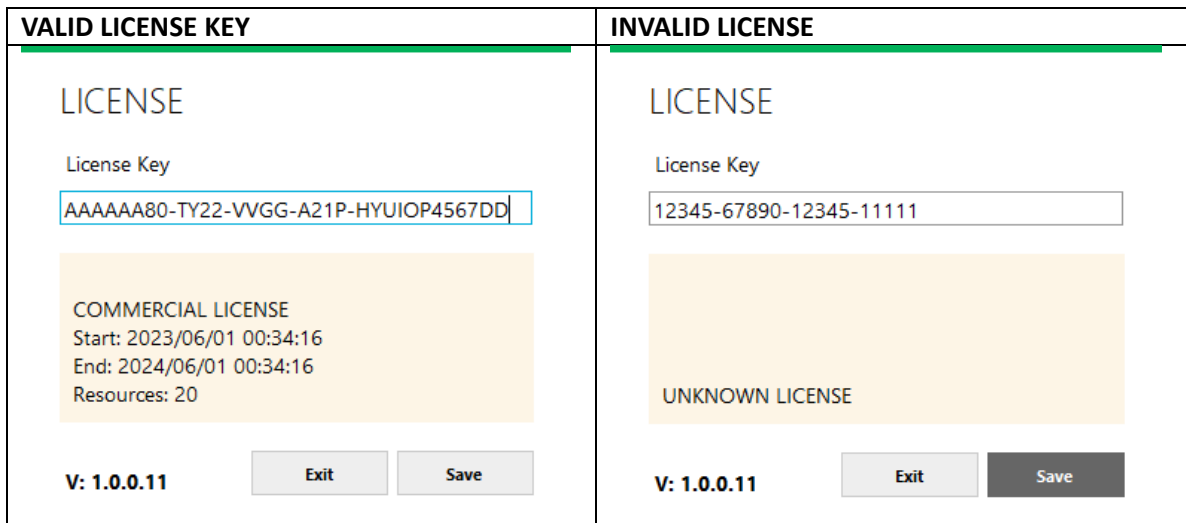In order to remove your already installed SCMPP Add-In proceed as follows:

➢ Close Microsoft Project
➢ Uninstall the entry below from Control Panel->Programs

SCMPP Add-In Tutorial

Add-In Usage

License configuration

open the License window by clicking on the menu option below:
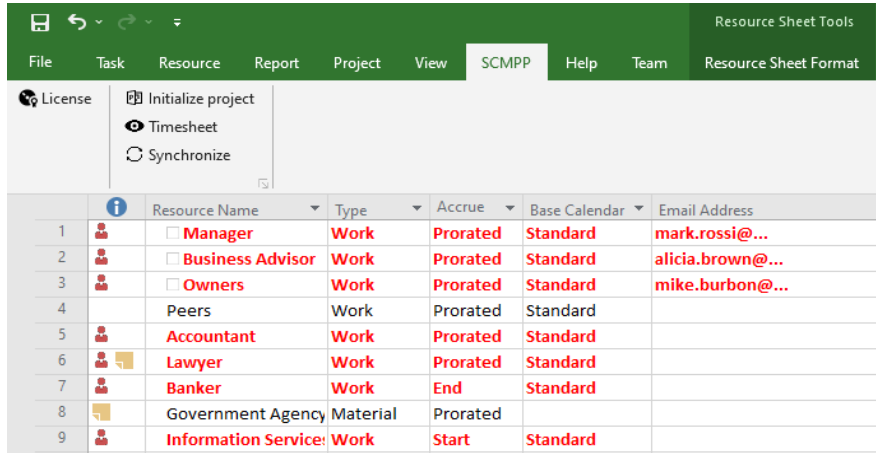

the following window appears:

VALID LICENSE KEY	INVALID LICENSE
LICENSE License Key AAAAAA80-TY22-VVGG-A21P-HYUIOP4567DD COMMERCIAL LICENSE Start: 2023/06/01 00:34:16 End: 2024/06/01 00:34:16 Resources: 20 V: 1.0.0.11 Exit Save	**LICENSE** License Key 12345-67890-12345-11111 UNKNOWN LICENSE V: 1.0.0.11 Exit Save

Configure the license key, that you have received via email, and click on Save. The system checks the license and display the result.

If the Add-In is updated to a new version, it is necessary to configure the license key again.

SCMPP Add-In Tutorial

Resources configuration

Scmpp can only publish timesheet requests to assigned tasks to resources that have a valid email in the Email Address column. Open the Resource Sheet on Microsoft Project, add the column Email Address and fill it with a valid email for the resources. Resources without the Email Address will be skipped.
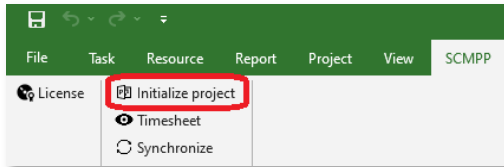

If the resource is involved in multiple projects in all projects the same resource must be configured with the same email. This limit is due to the fact that the timesheet client allows you to configure only a single resource identifier.

SCMPP Add-In Tutorial
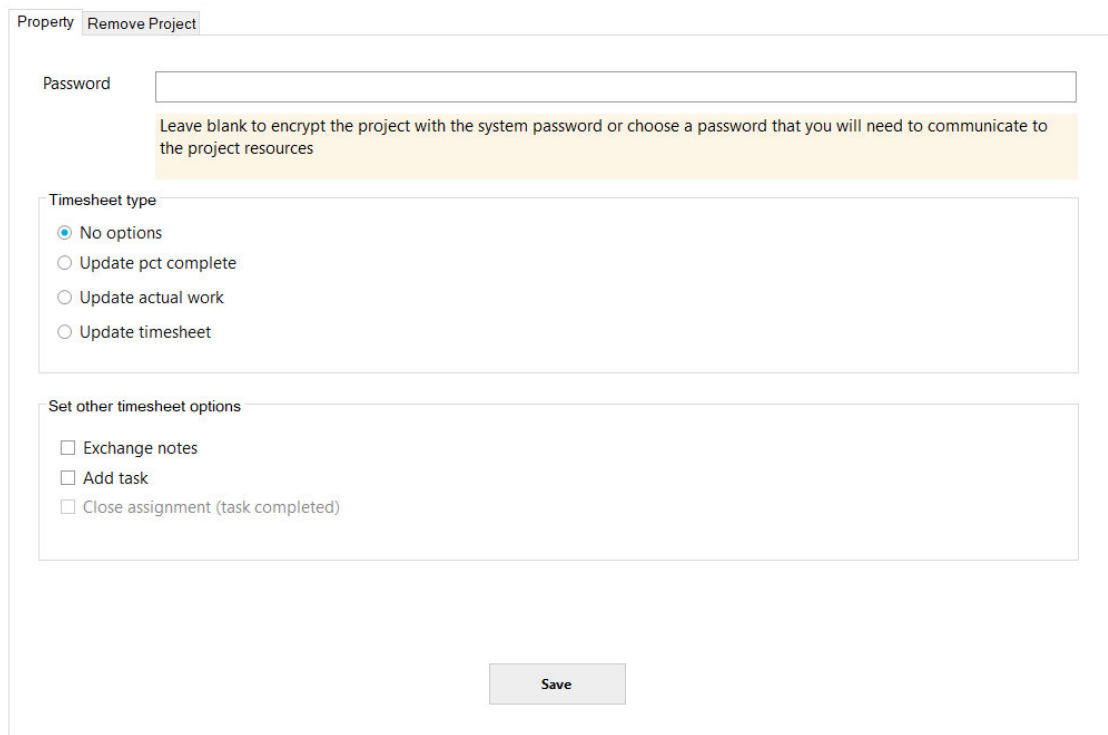
Initialize project

Scmpp can only publish timesheet for initialized projects. Click on the menu option below:

the following window appears

Even if you don't configure any options, you need to initialize the project using the Save button, in this case the resource cannot do any changes and therefore the timesheet client works as a viewer.

Once the project is initialized the menu option, change as below:

SCMPP Add-In Tutorial
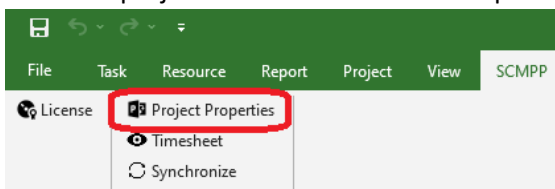
You still have the possibility to change the project properties, but depending on the modified parameters and the project status, this operation may require some preliminary operations, such as deleting the published tasks.

- o **Password**
  SCMPP uses the End-to-end encryption. Each project is encrypted with a password.

  If you don't configure a password, still the data is encrypted with a system password.

  If you configure a password the data will be encrypted with it, remember to communicate the password to your resources because Scmpp won't do it. Scmpp won't to know your password.

  The password can be the same even for several or all the company's projects so you will only have to communicate it once to the resources.
- o **Timesheet type**
  You can choose which option the resource can use to communicate the task progress.

  No options
  - ▪ The resource cannot communicate the task progress

  Update pct complete

  - ▪ The resource can change the task progress by changing the percentage of completion (example goes from 10% to 20%)

  Update actual work

  - ▪ The resource can change the task progress by indicating the total number of hours worked (example goes from 16 hours to 32 hours)

  Update timesheet
  - ▪ Choosing Update timesheet allows the resource to communicate progress for each day, week or month. You can choose how many period the resource can view and edit, see the screenshot below:

  The periods are always consecutive and therefore also include periods with planned work equal to zero and therefore not editable by the resource.

- o **Set other timesheet options**
  There are three additional non-alternative options that can be configured.

    Exchange notes
    - ▪ This option, for each assigned task, enables a text field both for the Project Manager (Add-In) and for the Resource (Timesheet Client) to communicate textual information related to that assigned task. For this exchange, the Notes column of the assignment will be used. This column should never be changed manually in Microsoft Project as it has a format that can only be understood by the Scmpp system.

    Add task
    - ▪ This option allows resources to suggest a task to the Project Manager for a given Project. The resource can specify a task name, notes, planned hours start date, and finish date. The Project Manager can see the list of suggested tasks and decide whether to import them into Microsoft Project or ignore them.
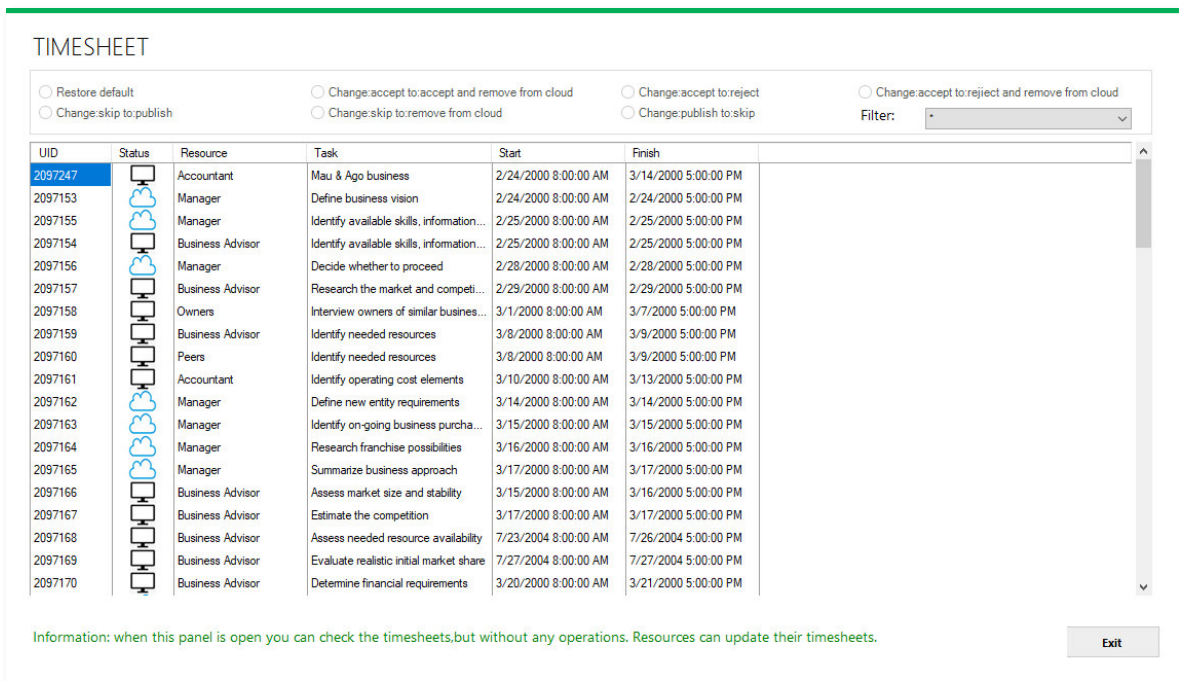
    Close assignment (task completed)
    - ▪ This option allows the resources to communicate the task completion (100%). This feature is not always available in the timesheet client, even if it is configured by the project manager. In the event that the task, in Microsoft Project, is in Automatic Scheduled mode, and the task type is Fixed Work, an explicit finish date is requested if the project is initialized with Update pct complete. If the project is initialized with Update timesheet, the resource can set the task as finished, but the system takes the date of the last submitted timesheet period as the finish date. In the event that the task, in Microsoft Project, is in Manual Scheduled mode or the task type is not Fixed Work this feature is not available on the timesheet client.

SCMPP Add-In Tutorial

Timesheet

In order to view the resource timesheet and/or the publication status of the tasks without performing any operation (read only) click on the menu option below:

the following window appears

The columns on this view are dynamic, the first six columns are fixed, other columns are added according to your configuration made in Initialize project. In this case no options have been configured. In this window there is no possibility to do anything except resource filtering. You can just check. When this window is open the resources are not blocked and can publish their changes.

SCMPP Add-In Tutorial

The status icon shows you the task status (a tooltip on the icon is available). Below all the possible icons and their meaning:

🖥	The task is local only, not published
☁	The task is published. The resource has not made any changes
☁	The task is published and the resource has made changes
☁	The task is published and the resource has made changes, however some assignment data has changed locally.
☁	The task is published. The resource has not made any changes, some assignment data has changed locally
☁?	The task is published however is not more present locally on Microsoft Project

Depending on the possible configurations in project initialization or subsequent modifications, below how the Timesheet window changes:

Pct Complete: three columns are added: %complete on Microsoft Project, %complete published, %complete changed by resource.
Actual work: Four columns are added: Planned Work on Microsoft Project, Actual Work on Microsoft Project, Actual Work published, Actual Work changed by resource.
Timesheet details: two columns are added: Detailed timesheet icon, flag (Yes/No) indicating whether the resource has edited the detailed timesheet. Double clicking on the icon opens the timesheet detail window.
Timesheet detail window. The period depends on configuration: day, week or month.

DETAILED TIMESHEET (Daily)

Start	Finish	Planned Work	Planned Work (Published on Cloud)	Actual Work (Current Local Project)	Actual Work (Published on Cloud)	Actual Work (Specified by Resource)
6/28/2023 12:00:00 ...	6/29/2023 12:00:00 PM	1 day				
6/29/2023 12:00:00 ...	6/30/2023 12:00:00 PM	1 day				
6/30/2023 12:00:00 ...	7/1/2023 12:00:00 PM	1 day				
7/1/2023 12:00:00 PM	7/2/2023 12:00:00 PM					
7/2/2023 12:00:00 PM	7/3/2023 12:00:00 PM					

In addition to the columnar structure above, configuring the other timesheet options the table changes as follows:

Exchange notes: three columns are added: the note of the resource not yet saved locally on Project, the column editable (click twice) by the project manager to write a note for the resource, historical note to see all the exchanged notes (an icon appears if they are present).

Set other timesheet options

■ Exchange notes
☐ Add task
☐ Close assignment (task completed)

Resource note	Write or reply notes	Historical notes
	Remember to do the timesheet	

Close assignment: a new column is added. If the resource ends the task indicating a date, this date will be displayed.

Set other timesheet options

☐ Exchange notes
☐ Add task
■ Close assignment (task completed)

Task Completed on Not Planned Date (Specified by Resource)	
7/21/2023 12:00:00 AM	

Add task:

this option allows resources to suggest a task by specifying the task name, a description, the planned work, the start date and the finish date**.**

When a resource suggests a task, the SCMPP Add-in shows a new list with suggested tasks:

Operations can be performed using the synchronize menu option.

Synchronize

For any operation with Resources and Microsoft Project use the menu option below:

the following window appears:

As you see this is the same previous Timesheet window, however is not in read only. The Action column is added. You can set an action for each assignment and execute the actions in one just click by clicking on Execute button.

The system set a default action for each assignment. The action decided by the system is the most logical one, however you can punctually change an action on a single assignment or massively using the available options:

Not always all the options are enabled it depends on the status of the assignments.
if it's more convenient for you, using the resource filter, you can work on a single resource.

SCMPP Add-In Tutorial

In case we have suggested tasks you can decide what to do for them:

If you decide to add the task to the project on Microsoft Project you can see:

Once the SCMPP Add-in has added the task it is possible to move it. SCMPP adds the task in Auto Scheduled mode and Fixed Work type. Obviously you can change the task properties as you wish.

The task has been added, however it **is still local to MS Project**, so you need to publish it to make it visible and editable from the resource:

To maintain system consistency, resources cannot make changes to this project when the project manager has this window open.

Remove a project

At any time you can remove a project from SCMPP system. In order to remove the project you have to open the Project Properties and on this window choose the Remove Project section.

Click on Remove Project button.

Warning: by deleting the project, any changes made by the resources and not yet synchronized on Microsoft Project will be lost.