

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	2
Add-In Installation.....	2
Add-In Update.....	3
Add-In Remove.....	3
Add-In Usage.....	4
License configuration	4
Resources configuration.....	5
Initialize project.....	6
Timesheet	9
Synchronize.....	13
Remove a project	15

Requirement

Microsoft Project installed.

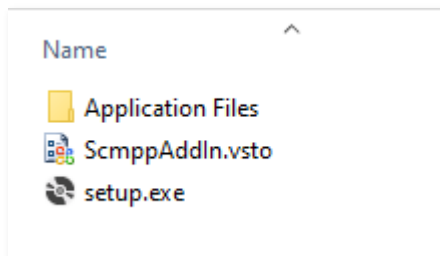
Ask for and receive the SCMPP license key. In order to receive the license key email us at info@k-sol.it.

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

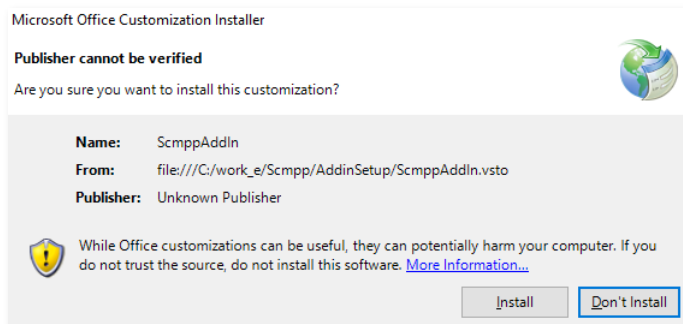
If your company has never used the SCMPP platform, we will provide you with a 30-day free trial with a maximum of 5 resources.

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:

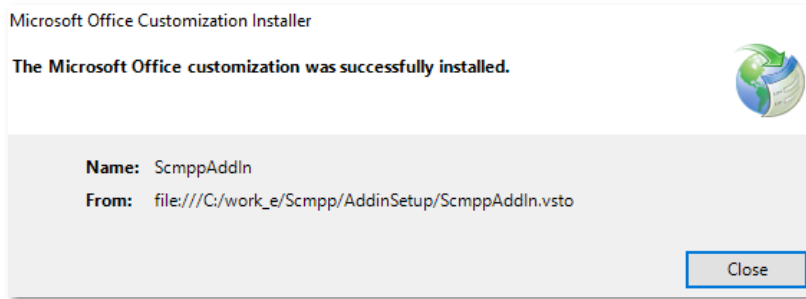


- In order to setup the Add-In you have to double click on setup.exe file
- Depending on your Operating System you can have the warning below:

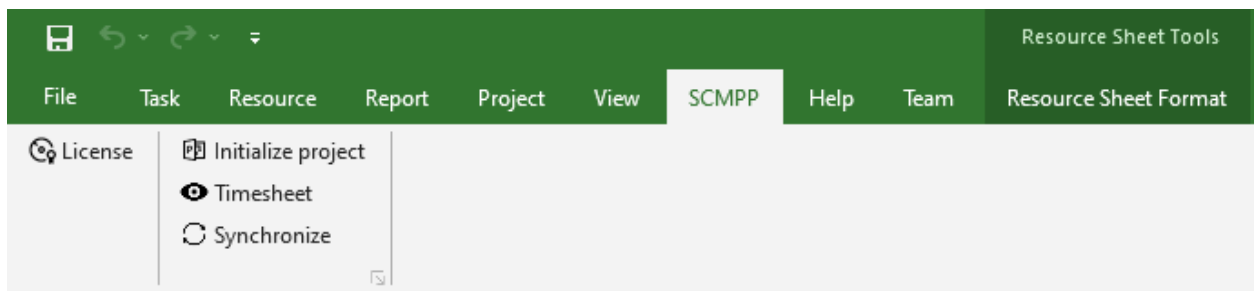


Please ignore the warning and Install the Add-In.

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



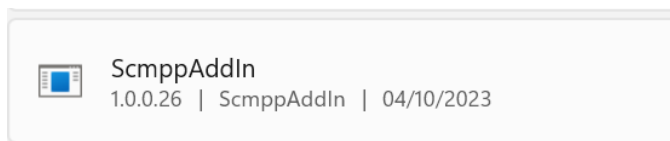
- Start Microsoft Project and open a plan, you can see the SCMPP Add-In installed, see the screenshot below:



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

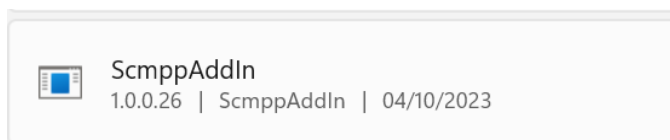


- Install the new version as already described

Add-In Remove

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

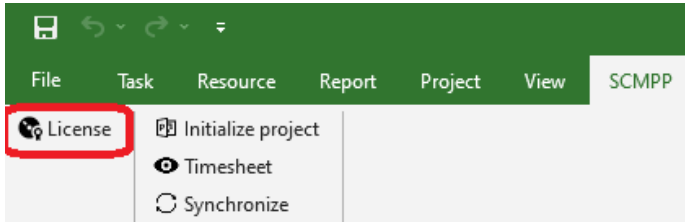
- Close Microsoft Project
- Uninstall the entry below from Control Panel->Programs



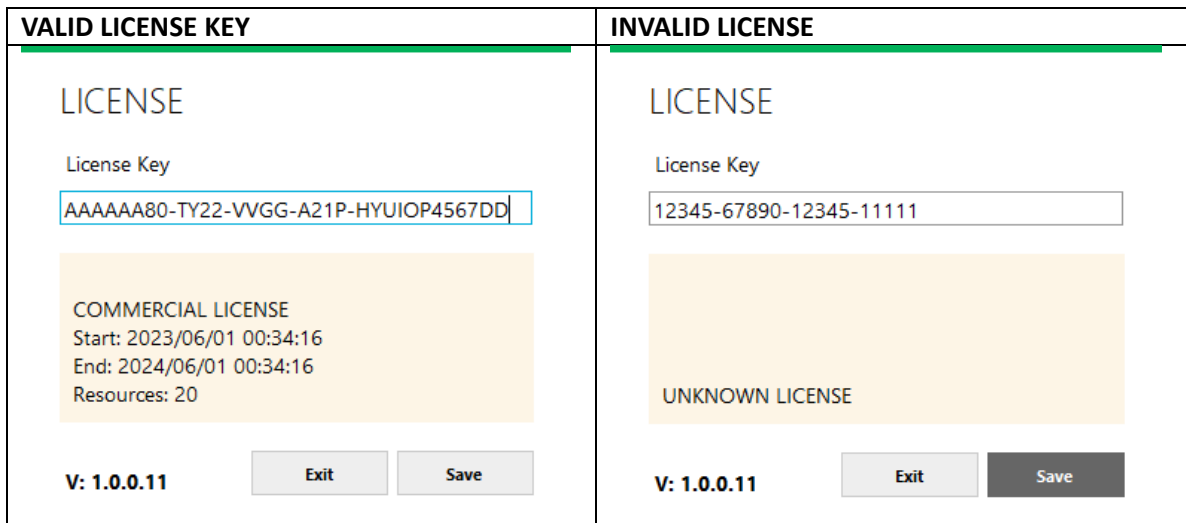
Add-In Usage

License configuration

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



the following window appears:

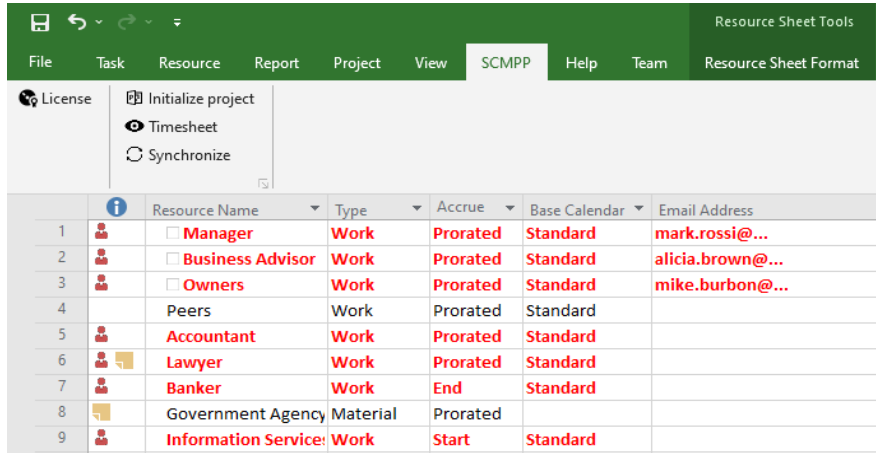


Configure the license key, that you have received via email, and click on Save. The system checks the license and display the result.

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

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.



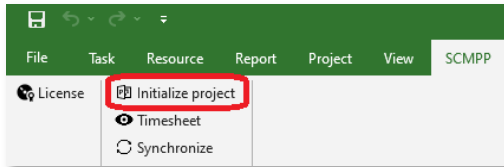
The screenshot shows the Microsoft Project Resource Sheet interface. The top ribbon includes 'File', 'Task', 'Resource', 'Report', 'Project', 'View', 'SCMPP', 'Help', 'Team', and 'Resource Sheet Format'. The 'SCMPP' tab is active, showing options like 'Initialize project', 'Timesheet', and 'Synchronize'. Below the ribbon is a table with the following data:

		Resource Name	Type	Accrue	Base Calendar	Email Address
1		<input type="checkbox"/> Manager	Work	Prorated	Standard	mark.rossi@...
2		<input type="checkbox"/> Business Advisor	Work	Prorated	Standard	alicia.brown@...
3		<input type="checkbox"/> Owners	Work	Prorated	Standard	mike.burbon@...
4		Peers	Work	Prorated	Standard	
5		Accountant	Work	Prorated	Standard	
6		Lawyer	Work	Prorated	Standard	
7		Banker	Work	End	Standard	
8		Government Agency	Material	Prorated		
9		Information Service	Work	Start	Standard	

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.

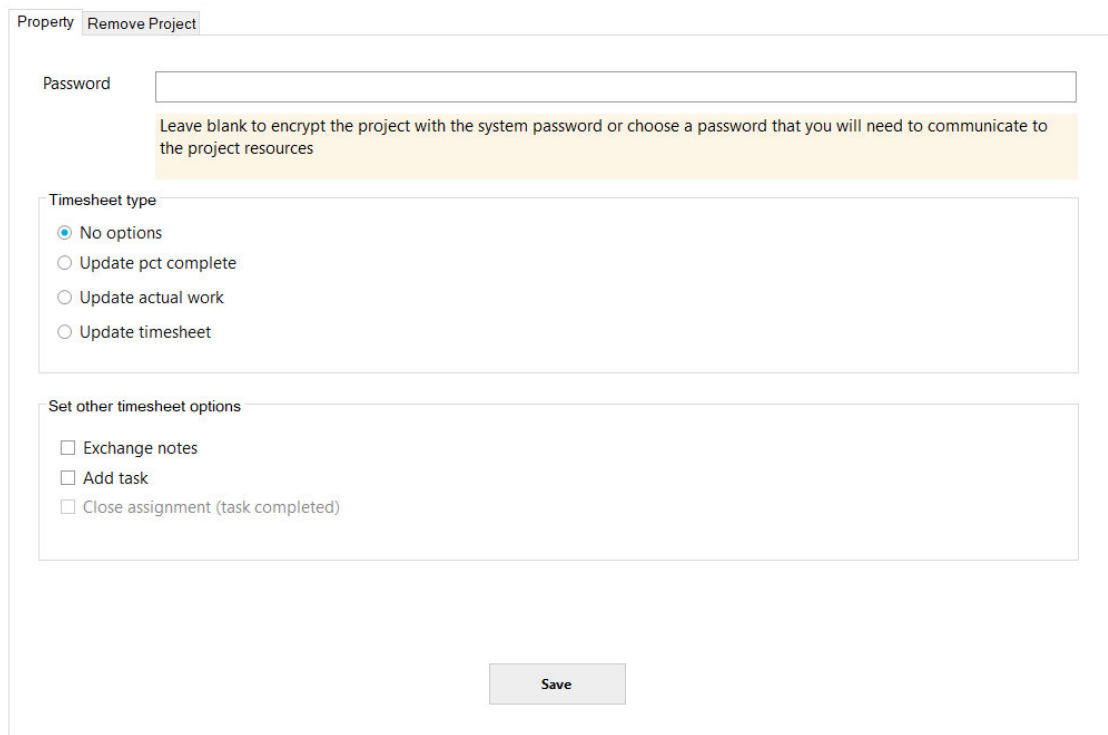
Initialize project

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



the following window appears

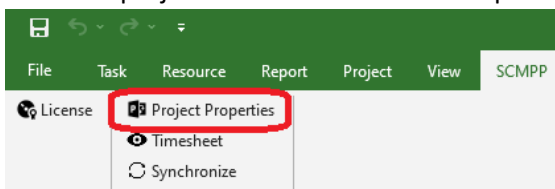
INITIALIZE PROJECT

A screenshot of the 'INITIALIZE PROJECT' dialog box. It has two tabs: 'Property' and 'Remove Project'. The 'Property' tab is active. It contains a 'Password' field with a yellow tooltip that reads: 'Leave blank to encrypt the project with the system password or choose a password that you will need to communicate to the project resources'. Below this is the 'Timesheet type' section with four radio button options: 'No options' (selected), 'Update pct complete', 'Update actual work', and 'Update timesheet'. The 'Set other timesheet options' section has three checkboxes: 'Exchange notes', 'Add task', and 'Close assignment (task completed)'. At the bottom right of the dialog is a 'Save' button.

Exit

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:



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.

- **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.

- **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 screenshot shows a configuration window titled "Timesheet type". On the left, there are four radio button options: "No options", "Update pct complete", "Update actual work", and "Update timesheet". The "Update timesheet" option is selected. To the right of these options is a yellow callout box with the text: "Specify how many periods before and after to the last edited period, to make available to resources (day, week, month)". Below the callout box, there are three columns: "Before", "After", and "Type". Under "Before" is a dropdown menu with the value "0". Under "After" is a dropdown menu with the value "7". Under "Type" is a dropdown menu with the value "Daily".

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

- **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.

A screenshot of a text input field with the label 'Notes' and a small downward-pointing arrow on the right side, indicating it might be a dropdown or have a search function.

R@§@9/20/2023 12:11:21 PM@

- **Add task**

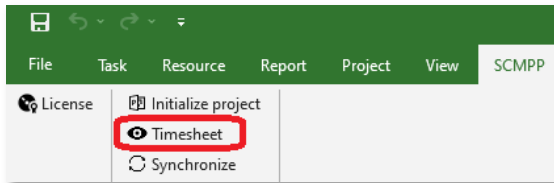
- This option allows resources to suggest a task to the Project Manager for a given Project. The resource can specify a task name, notes, planned hours start date, and finish date. The Project Manager can see the list of suggested tasks and decide whether to import them into Microsoft Project or ignore them.

- **Close assignment (task completed)**

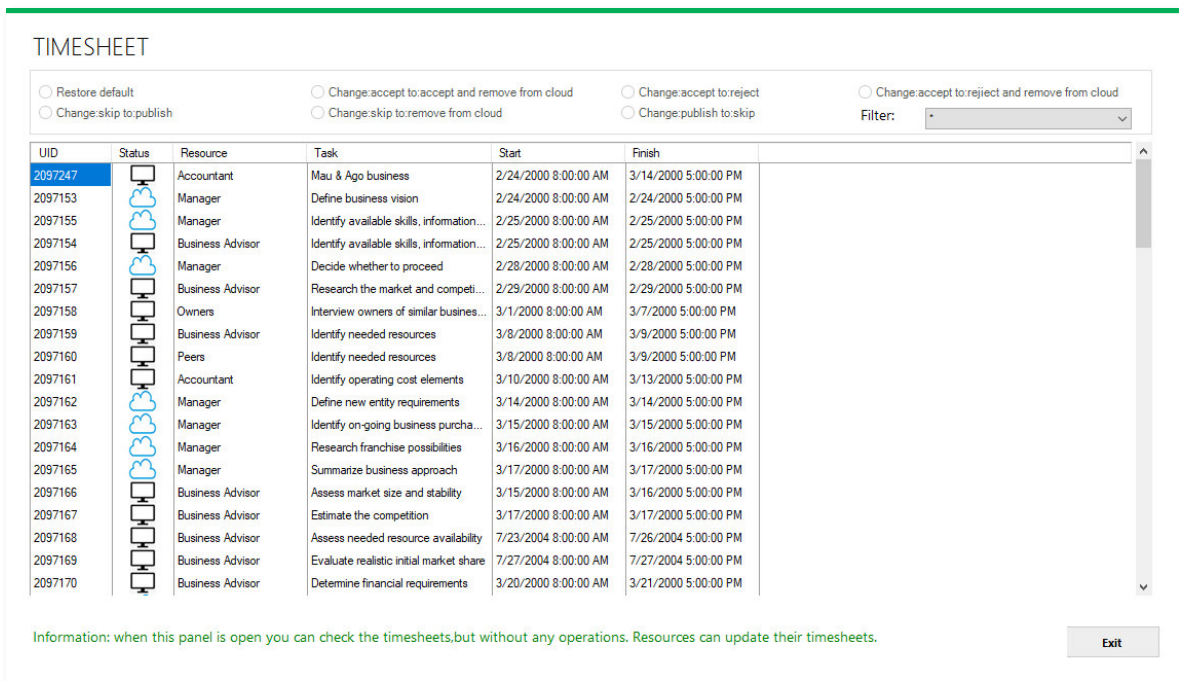
- This option allows the resources to communicate the task completion (100%). This feature is not always available in the timesheet client, even if it is configured by the project manager. In the event that the task, in Microsoft Project, is in Automatic Scheduled mode, and the task type is Fixed Work, 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.

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 'TIMESHEET' window displays a table with columns for UID, Status, Resource, Task, Start, and Finish. The table lists various tasks and the resources assigned to them, along with their start and finish times. The first row is highlighted in blue.







UID	Status	Resource	Task	Start	Finish
2097247		Accountant	Mau & Ago business	2/24/2000 8:00:00 AM	3/14/2000 5:00:00 PM
2097153		Manager	Define business vision	2/24/2000 8:00:00 AM	2/24/2000 5:00:00 PM
2097155		Manager	Identify available skills, information...	2/25/2000 8:00:00 AM	2/25/2000 5:00:00 PM
2097154		Business Advisor	Identify available skills, information...	2/25/2000 8:00:00 AM	2/25/2000 5:00:00 PM
2097156		Manager	Decide whether to proceed	2/28/2000 8:00:00 AM	2/28/2000 5:00:00 PM
2097157		Business Advisor	Research the market and competi...	2/29/2000 8:00:00 AM	2/29/2000 5:00:00 PM
2097158		Owners	Interview owners of similar busines...	3/1/2000 8:00:00 AM	3/7/2000 5:00:00 PM
2097159		Business Advisor	Identify needed resources	3/8/2000 8:00:00 AM	3/9/2000 5:00:00 PM
2097160		Peers	Identify needed resources	3/8/2000 8:00:00 AM	3/9/2000 5:00:00 PM
2097161		Accountant	Identify operating cost elements	3/10/2000 8:00:00 AM	3/13/2000 5:00:00 PM
2097162		Manager	Define new entity requirements	3/14/2000 8:00:00 AM	3/14/2000 5:00:00 PM
2097163		Manager	Identify on-going business purcha...	3/15/2000 8:00:00 AM	3/15/2000 5:00:00 PM
2097164		Manager	Research franchise possibilities	3/16/2000 8:00:00 AM	3/16/2000 5:00:00 PM
2097165		Manager	Summarize business approach	3/17/2000 8:00:00 AM	3/17/2000 5:00:00 PM
2097166		Business Advisor	Assess market size and stability	3/15/2000 8:00:00 AM	3/16/2000 5:00:00 PM
2097167		Business Advisor	Estimate the competition	3/17/2000 8:00:00 AM	3/17/2000 5:00:00 PM
2097168		Business Advisor	Assess needed resource availability	7/23/2004 8:00:00 AM	7/26/2004 5:00:00 PM
2097169		Business Advisor	Evaluate realistic initial market share	7/27/2004 8:00:00 AM	7/27/2004 5:00:00 PM
2097170		Business Advisor	Determine financial requirements	3/20/2000 8:00:00 AM	3/21/2000 5:00:00 PM

Information: when this panel is open you can check the timesheets, but without any operations. Resources can update their timesheets.




Exit

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.

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.					
Timesheet type <input type="radio"/> No options <input checked="" type="radio"/> Update pct complete <input type="radio"/> Update actual work <input type="radio"/> Update timesheet		% Complete (Current Local Project)	% Complete (Published on Cloud)	% Complete (Specific by Resource)	
		40%			
		0%	0%		
		0%	0%		
		0%			
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 type <input type="radio"/> No options <input type="radio"/> Update pct complete <input checked="" type="radio"/> Update actual work <input type="radio"/> Update timesheet		Planned Work	Actual Work (Current Local Project)	Actual Work (Published on Cloud)	Actual Work (Specific by Resource)
		5 days	2 days		
		1 day	0 hrs		
		1 day	0 hrs		
		1 day	0 hrs		
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 type <input type="radio"/> No options <input type="radio"/> Update pct complete <input type="radio"/> Update actual work <input checked="" type="radio"/> Update timesheet	Specify how many periods before and after to the last edited period, to make available to resources (day, week, month) Before: 0 After: 7 Type: Daily	Detailed timesheet	Has the resource entered the timesheet?		
			No		
			No		
			No		
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).

<p>Set other timesheet options</p> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Exchange notes <input type="checkbox"/> Add task <input type="checkbox"/> Close assignment (task completed) 	<table border="1"> <thead> <tr> <th>Resource note</th> <th>Write or reply notes</th> <th>Historical notes</th> </tr> </thead> <tbody> <tr> <td></td> <td>Remember to do the timesheet</td> <td></td> </tr> </tbody> </table>	Resource note	Write or reply notes	Historical notes		Remember to do the timesheet	
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.

<p>Set other timesheet options</p> <ul style="list-style-type: none"> <input type="checkbox"/> Exchange notes <input type="checkbox"/> Add task <input checked="" type="checkbox"/> Close assignment (task completed) 	<table border="1"> <thead> <tr> <th>Task Completed on Not Planned Date (Specified by Resource)</th> </tr> </thead> <tbody> <tr> <td>7/21/2023 12:00:00 AM</td> </tr> </tbody> </table>	Task Completed on Not Planned Date (Specified by Resource)	7/21/2023 12:00:00 AM
Task Completed on Not Planned Date (Specified by Resource)			
7/21/2023 12:00:00 AM			

Add task:

Set other timesheet options

- Exchange notes
- Add task
- Close assignment (task completed)

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.

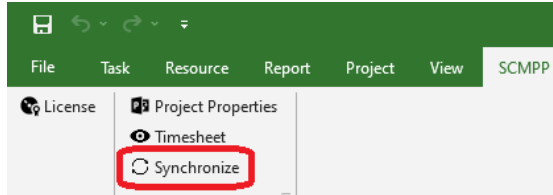
When a resource suggests a task, the SCMP Add-in shows a new list with suggested tasks:

The screenshot shows the 'TIMESHEET' application interface. At the top, there are several radio button options for changing task status: 'Restore default', 'Change:accept to:accept and remove from cloud', 'Change:accept to:reject', 'Change:accept to:reject and remove from cloud', 'Change:skip to:publish', 'Change:skip to:remove from cloud', and 'Change:publish to:skip'. A 'Filter:' dropdown menu is also present. Below these options is a table with columns: UID, Status, Resource, Task, Start, and Finish. The table lists various tasks assigned to different resources. A red box highlights a section titled 'SUGGESTED TASK BY THE RESOURCES (suggested task will be added in MS Project under the summary "Suggested Tasks by the Resources")'. This section contains a table with columns: Resource, Task, Start, Finish, Planned Work, and Notes. The first row in this table shows a 'Manager' resource suggesting a task 'Find business Partners' with a start date of 7/24/2023 12:00:00 AM, a finish date of 10/31/2023 12:00:00 ..., 10 days of planned work, and a note 'Is essential to the success of the Project'. At the bottom of the interface, there is an 'Exit' button and a green information message: 'Information: when this panel is open you can check the timesheets, but without any operations. Resources can update their timesheets.'

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:

The screenshot shows the TIMESHEET window with a table of assignments. The table has columns: UID, Status, Action, Resource, Task, Start, Finish, Detailed timesheet, and Has the resource entered the. The Action column is highlighted in blue. Below the table, there is a warning message: "Warning: when this panel is open resources do not have the possibility to update timesheet!". At the bottom right, there are buttons for "Exit" and "Execute".

UID	Status	Action	Resource	Task	Start	Finish	Detailed timesheet	Has the resource entered the
2097247		publish	Accountant	Mau & Ago business	2/24/2000 8:00:00 AM	3/14/2000 5:00:00 PM		No
2097153		accept	Manager	Define business vision	6/28/2023 8:00:00 AM	11/15/2023 5:00:00 PM		Yes
2097155		skip	Manager	Identify available skills, information...	11/16/2023 8:00:00 AM	11/16/2023 5:00:00 PM		No
2097154		publish	Business Advisor	Identify available skills, information...	11/16/2023 8:00:00 AM	11/16/2023 5:00:00 PM		No
2097156		skip	Manager	Decide whether to proceed	2/28/2000 8:00:00 AM	2/28/2000 5:00:00 PM		No
2097157		publish	Business Advisor	Research the market and competi...	2/29/2000 8:00:00 AM	2/29/2000 5:00:00 PM		No
2097158		publish	Owners	Interview owners of similar busines...	3/1/2000 8:00:00 AM	3/7/2000 5:00:00 PM		No
2097159		publish	Business Advisor	Identify needed resources	3/8/2000 8:00:00 AM	3/9/2000 5:00:00 PM		No
2097160		publish	Peers	Identify needed resources	3/8/2000 8:00:00 AM	3/9/2000 5:00:00 PM		No
2097161		publish	Accountant	Identify operating cost elements	3/10/2000 8:00:00 AM	3/13/2000 5:00:00 PM		No
2097162		skip	Manager	Define new entity requirements	3/14/2000 8:00:00 AM	3/14/2000 5:00:00 PM		No
2097163		skip	Manager	Identify on-going business purcha...	3/15/2000 8:00:00 AM	3/15/2000 5:00:00 PM		No
2097164		skip	Manager	Research franchise possibilities	3/16/2000 8:00:00 AM	3/16/2000 5:00:00 PM		No
2097165		skip	Manager	Summarize business approach	3/17/2000 8:00:00 AM	3/17/2000 5:00:00 PM		No
2097166		publish	Business Advisor	Assess market size and stability	3/15/2000 8:00:00 AM	3/16/2000 5:00:00 PM		No
2097167		publish	Business Advisor	Estimate the competition	3/17/2000 8:00:00 AM	3/17/2000 5:00:00 PM		No
2097168		publish	Business Advisor	Assess needed resource availability	7/23/2004 8:00:00 AM	7/26/2004 5:00:00 PM		No
2097169		publish	Business Advisor	Evaluate realistic initial market share	7/27/2004 8:00:00 AM	7/27/2004 5:00:00 PM		No

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:

The screenshot shows the action options at the top of the TIMESHEET window. There are seven radio button options: Restore default, Change:skip to:publish, Change:accept to:accept and remove from cloud, Change:skip to:remove from cloud, Change:accept to:reject, Change:publish to:skip, and Change:accept to:reject and remove from cloud. There is also a Filter dropdown menu.

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.

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

TIMESHEET

Restore default
 Change:accept to:accept and remove from cloud
 Change:accept to:reject
 Change:accept to:reject and remove from cloud
 Change:skip to:publish
 Change:skip to:remove from cloud
 Change:publish to:skip
 Filter:

UID	Status	Action	Resource	Task	Start	Finish
2097247		skip	Accountant	Mau & Ago business	2/24/2000 8:00:00 AM	3/14/2000 5:00:00 PM
2097153		skip	Manager	Define business vision	6/28/2023 8:00:00 AM	11/15/2023 5:00:00 PM
2097155		skip	Manager	Identify available skills, information...	11/16/2023 8:00:00 AM	11/16/2023 5:00:00 PM
2097154		skip	Business Advisor	Identify available skills, information...	11/16/2023 8:00:00 AM	11/16/2023 5:00:00 PM
2097156		skip	Manager	Decide whether to proceed	2/28/2000 8:00:00 AM	2/28/2000 5:00:00 PM
2097157		skip	Business Advisor	Research the market and competi...	2/29/2000 8:00:00 AM	2/29/2000 5:00:00 PM
2097158		skip	Owners	Interview owners of similar busines...	3/1/2000 8:00:00 AM	3/7/2000 5:00:00 PM
2097159		skip	Business Advisor	Identify needed resources	3/8/2000 8:00:00 AM	3/9/2000 5:00:00 PM
2097160		skip	Peers	Identify needed resources	3/8/2000 8:00:00 AM	3/9/2000 5:00:00 PM
2097161		skip	Accountant	Identify operating cost elements	3/10/2000 8:00:00 AM	3/13/2000 5:00:00 PM

SUGGESTED TASK BY THE RESOURCES (suggested task will be added in MS Project under the summary "Suggested Tasks by the Resources")

Action	Resource	Task	Start	Finish	Planned Work	Notes
<input type="radio"/> Add task to this Project <input type="radio"/> Add task to this Project <input type="radio"/> Reject and remove suggestion <input type="radio"/> skip	Manager	Find business Partners	7/24/2023 12:00:00 AM	10/31/2023 12:00:00 ...	10 days	Is essential to the succes

Warning: when this panel is open resources do not have the possibility to update timesheet!

Exit Execute

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

Task Name	Start	Finish	Work	Actual Work	3rd Quarter			4th Quarter			1st
					Jul	Aug	Sep	Oct	Nov	Dec	Jan
Start up the business	Fri 8/11/00	Fri 8/11/00	0 hrs	0 hrs							
Suggested task by the resources	Mon 7/24/23	Tue 10/31/23	40 hrs	0 hrs							
Find business Partners	Mon 7/24/23	Tue 10/31/23	40 hrs	0 hrs							

Manager[7%]

Once the SCMP Add-in has added the task it is possible to move it. SCMP 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:

2097250 publish Manager Find business Partners 7/24/2023 8:00:00 AM 10/30/2023 5:00:00 PM

Warning: when this panel is open resources do not have the possibility to update timesheet!

Exit Execute

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.

