Project to Excel – 2.1 Beta

User Guide

Martyn Richard Jones

2017

Foreword

This is the user guide for Project to Excel version 2.1 beta release.

Martyn Richard Jones

Bamberg, March 2017

cambriano energía

Contents

cambriano energía

Introduction

This is the User Manual for Project to Excel release 2.1 beta.

Project to Excel is a component application in the Tiki Taka Simple ecosphere of project and process planning, organising and communication tools. It has been designed for Windows 10.

All questions, queries and requests regarding this document should be sent to projecttoexcel@gmail.com

Installing

Dependencies

You must have the following apps installed on your Microsoft Windows 10 device (it may work with other versions of Windows and MS Apps, but it has not been tested on other versions):

1. Microsoft Project 2013 – or higher
2. Microsoft Excel 2010 – or higher

Acquiring

You can acquire the Project to Excel app by going to our blog site https://projecttoexcel.wordpress.com/ by clicking on the DOWNLOAD menu item and by choosing one of the download links.

The installation files are in ZIP format.

Download the ZIP file to your Microsoft Windows 10 device – laptop, server or desktop.

If you are not comfortable installing and configuring apps then get your support staff to do it for you. It's not difficult, but we understand that not everyone will want to do it themselves.

Installing

Project to Excel is a one click install. But first you have to get the required files out of the ZIP file. That is, once you have the ZIP file on your device you will need to UNZIP it.

You can do this with the standard Windows 10 Explorer.

Open a Windows Explorer. Navigate to the downloaded file. Right click on the directory entry for the downloaded ZIP file. Click on 'Open with'. Then choose 'Windows Explorer'.

Your Windows Explorer should be now showing just one entry. Click on 'deployP2E.2.1.Beta' and select 'Extract all' on the icon at the top of the window.

You will be asked to 'Select a Destination and Extract Files'. Follow the instructions.
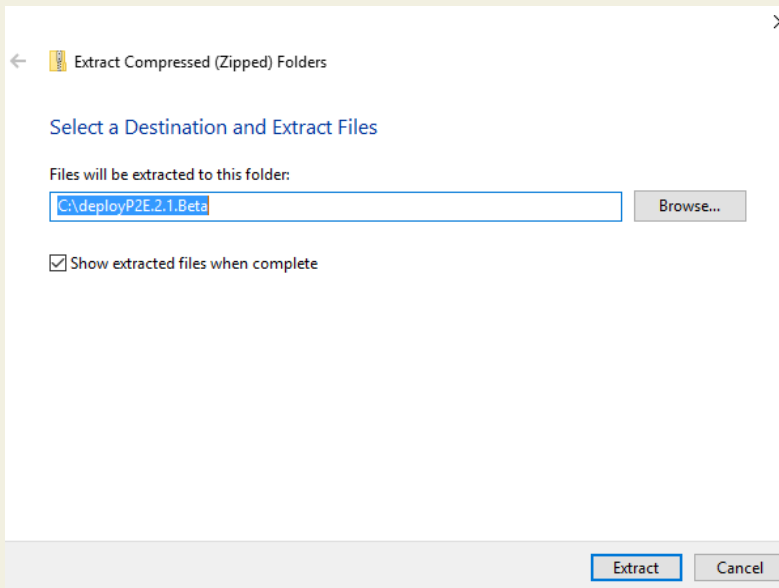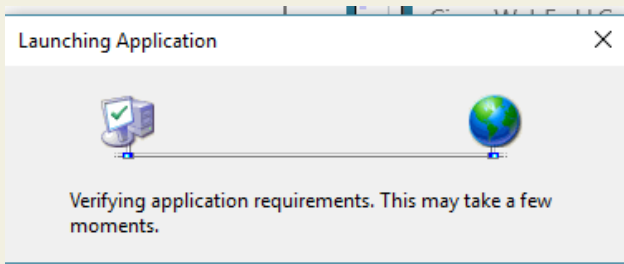
Once the extract has finished a Windows Explorer will pop-up with the newly created directory.
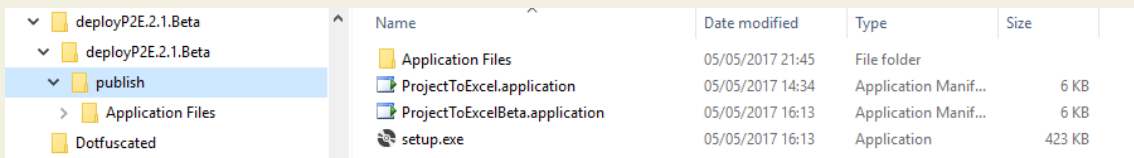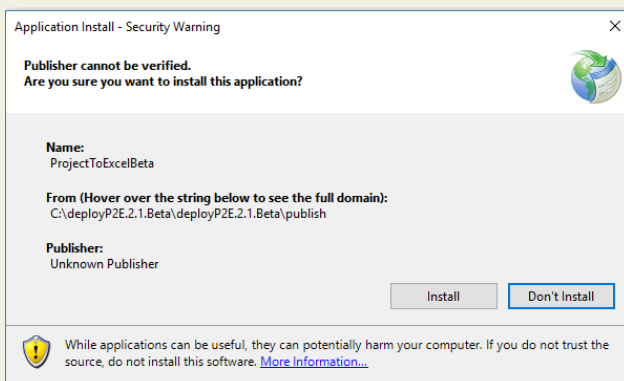

Navigate to the subdirectory deployP2E.2.1.Beta, then to 'publish'.

Click on setup.exe and follow the instructions.

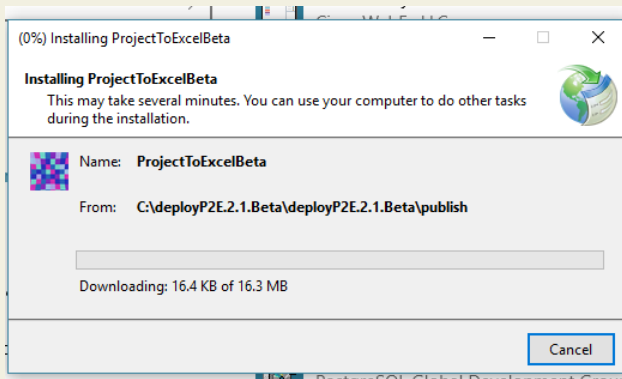The first window that should appear is this:

Then followed by this:

Click on the install button. But first ensure that the 'Name' is 'ProjectToExcelBeta'.
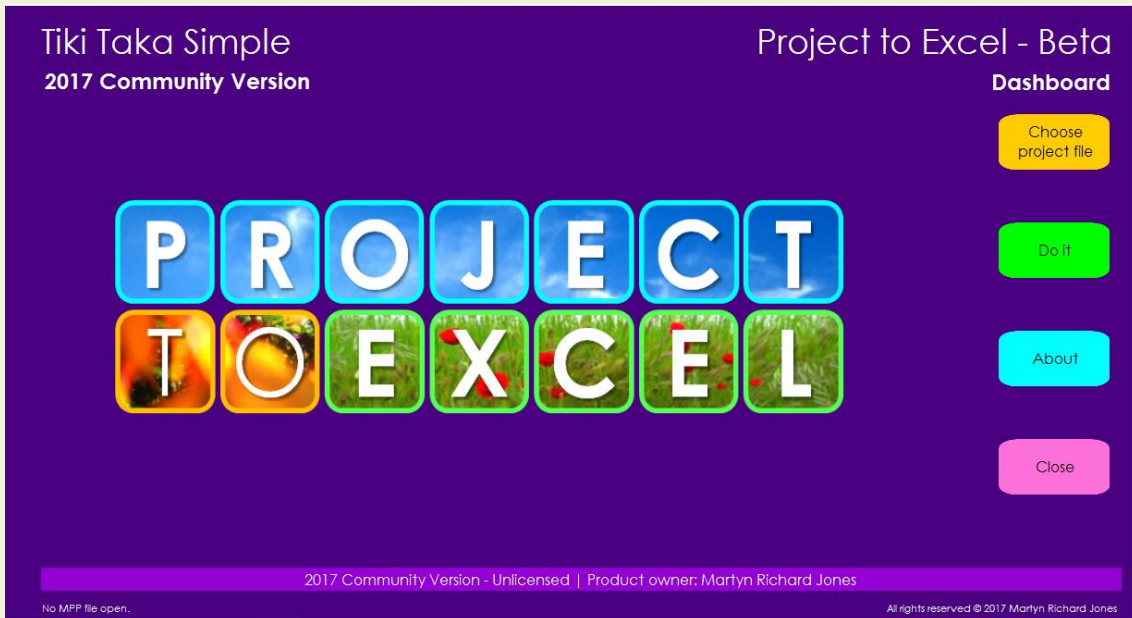
cambriano energía

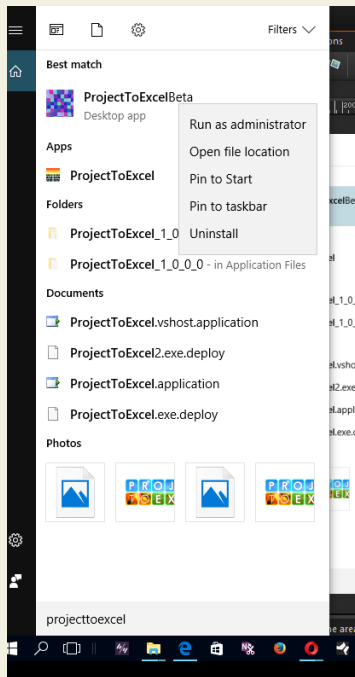The next screen you will see is this:

Finally, the application will install and launch. You will see the Project to Excel Dashboard.

cccc

At this time you may want to search for ProjectToExcelBeta and pin the desktop app to the Start and Taskbar.
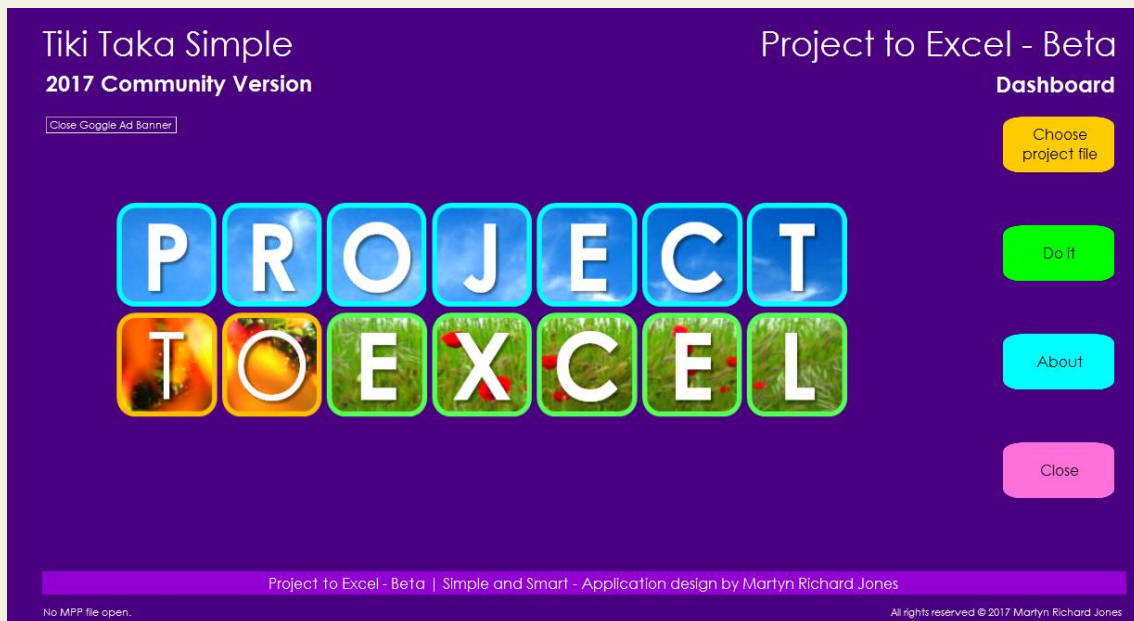
Launching

You can launch the application as shown above, by typing in the name of the Windows 10 app in the Search Windows box, or click on the icon on the Task bar or Start.

Component Parts of the Dashboard

Initial view

The initial view of the dashboard looks like this.

There are four action buttons here:

1. Chose project file – click on this and select the MPP file to ingest into Project to Excel.
2. Do it – once an MPP file is ingested you can then direct the app to produce a corresponding plan schedule in Microsoft Excel. Click on 'Do it', to make that happen.
3. The About button will pop-up a window with technical, copyright and contact details.
4. The Close button will initiate the closure process for the app. With required confirmation of closure.
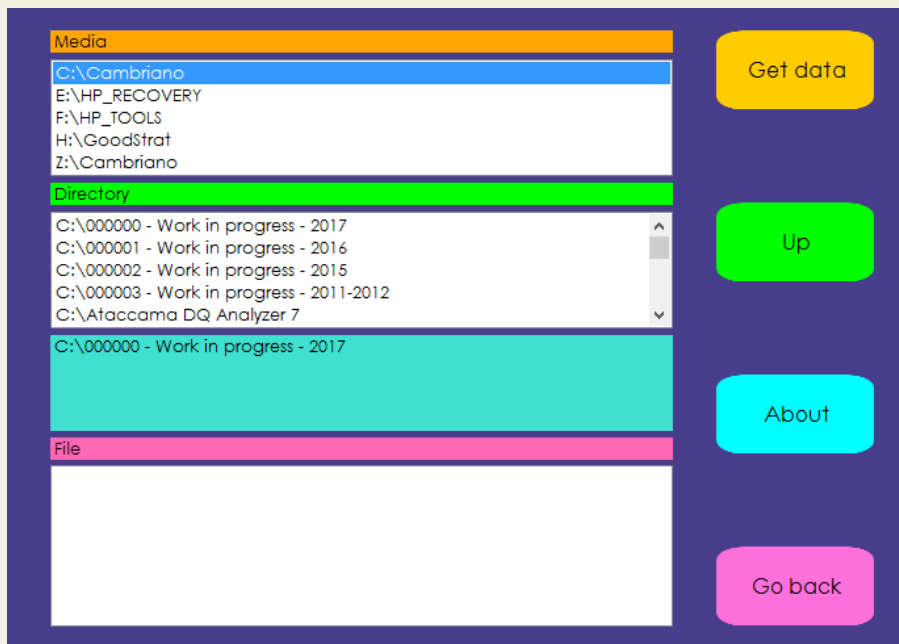
First select a file

When we click on 'Choose project file' another window will appear that will allow us to navigate to, and to choose the MPP file that we wish to use.

Again, it is a simple interface and should be easily mastered.

The windows appearance is as follow:

cambriano energía

1. The first list box – under the Media heading – allows us to select the device where our MPP file is located on.
2. The second list box – under the Directory heading – allows us to navigate the directory that contains our MPP file.
3. The third list box – under the File heading – allows us to select the precise MPP that we wish to work on.

Here's an example:
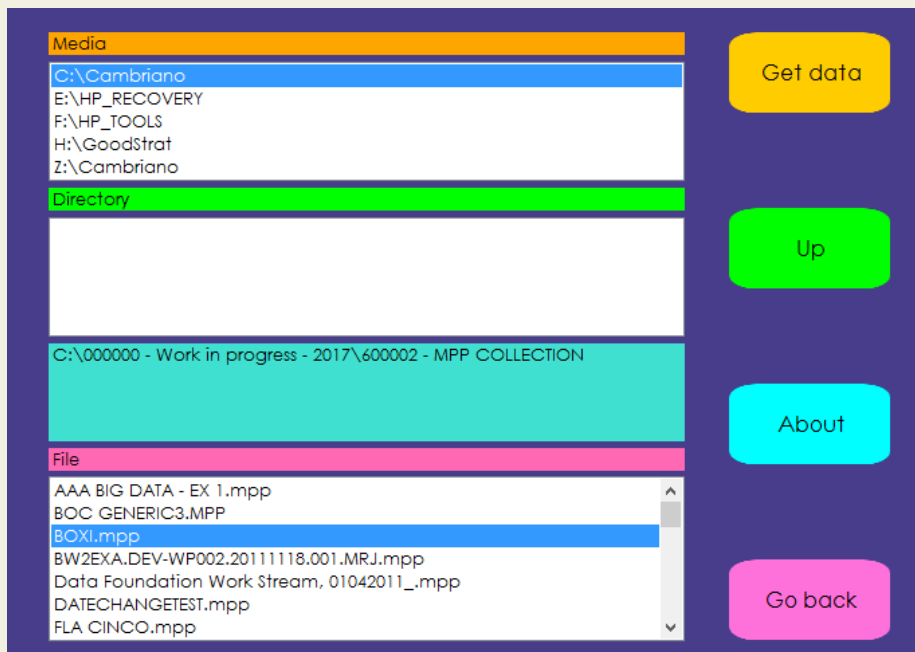
I have navigated to the directory 'C:\000000 – Work in progress – 2017\6000002 – MPP COLLECTION' and have selected the MPP file 'BOXI.mpp'.

Now, I can either double-click on the filename or click on 'Get data' and the file load process will kick-off.

Before I discuss that, let's just review the buttons:

1. Get data – starts process to load selected file. No selected file? No action.
2. Moves back up the hierarchy of directories. For example, if we are currently in directory 'C:\000000 – Work in progress – 2017\6000002 – MPP COLLECTION' and we click on 'Up' then the current directory would be set to 'C:\000000 – Work in progress – 2017'
3. About – just standard information about the app. A typical 'about window'.
4. Go back – Don't do anything. Just go back to the dashboard.
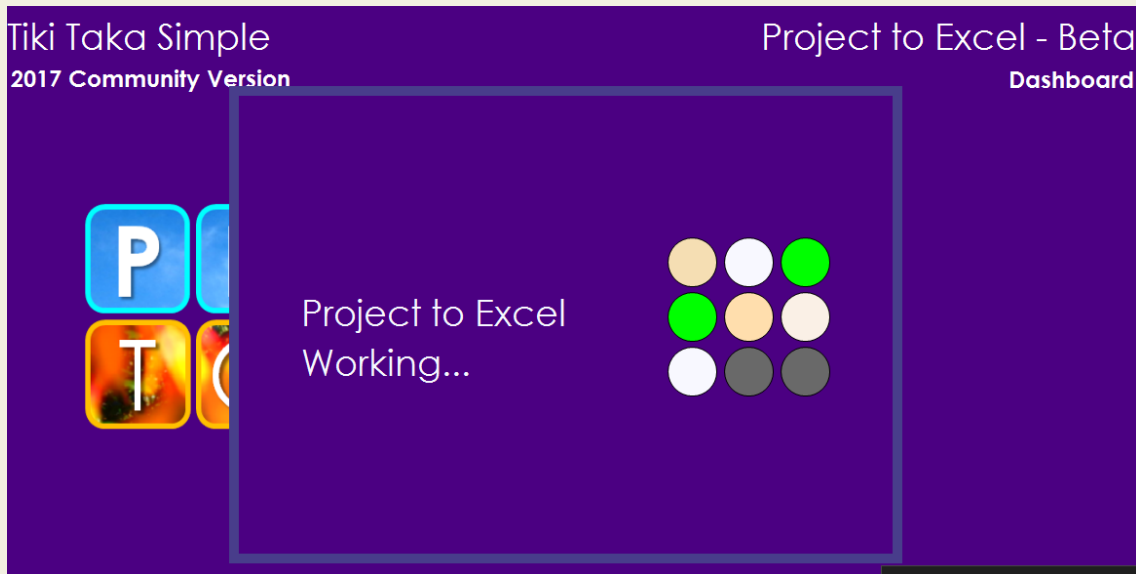
File selected, 'Get data' clicked

We've selected the desired file and we've clicked on 'Get data'. This is the next window. It's all very easy.
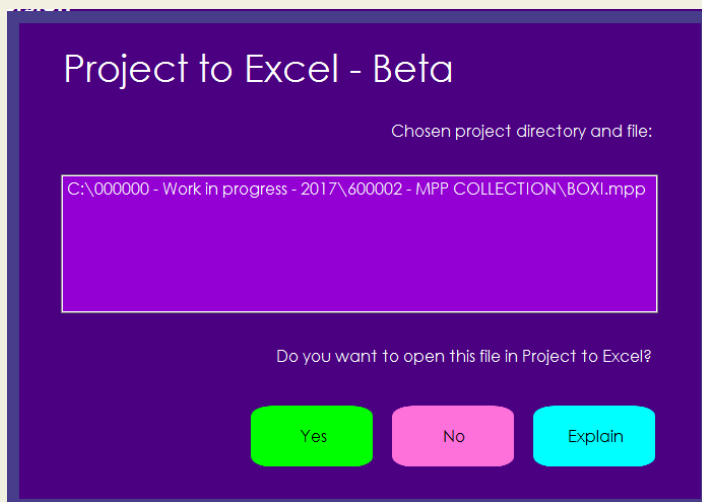
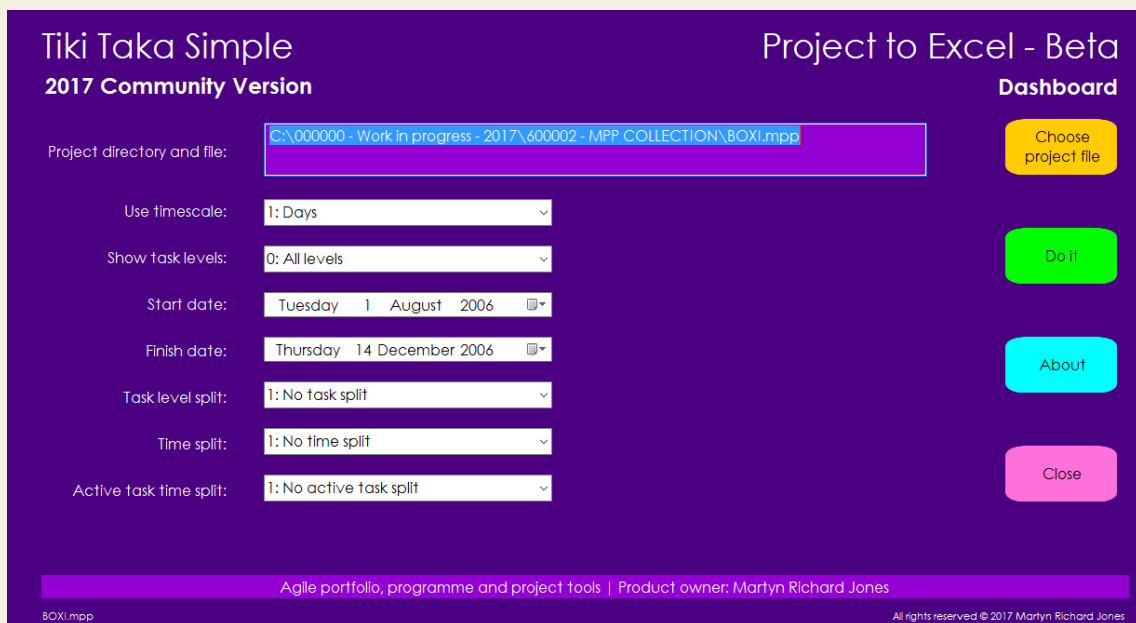1. Yes – load the file
2. No – Don't load the file
3. Explain…
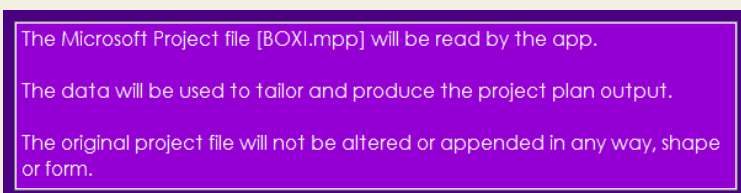
Well, there isn't that much to explain. When you click on 'Yes' you" see this screen:

cambriano energía

Then the full dashboard, with all the available customisation options. This is where it gets more interesting.

This is what the dashboard now looks like:

I will explain the pieces, one by one:

1. Project directory and file – this is the path and filename of the currently loaded MS Project MPP file
2. Use timescale – This is an output configuration option. This defines the timescale granularity. Do you want to see the schedule in days, weeks, months or quarters? This is where you choose that. The default is days.
3. Show task levels – this is where can tailor the summary task and task levels that you want to include in the output. The default is all levels.
4. Start date – this is a nice touch. You can change the start date of your project schedule and the entire project schedule is recalibrated.

5. Finish date – want to change your project finish date? Define a new date here and the entire project timeframe is recalibrated. Just like magic… or a bit of business oriented data engineering.
6. Splits – this project schedule segmentation feature needs to be explained in a little more detail. Segmentation means that instead of having one Microsoft Excel worksheet containing the project detail, you can have multiple sheets for that same project. You can divide up your project by task level, by time period and by time and active tasks in that time period. This can mean that a more complex project can be broken up into more manageable and understandable chunks.

Segmentation – It's simple   1/3

Segmentation means that instead of having one Microsoft Excel worksheet containing the project detail, you can have multiple sheets for that same project. You can divide up your project by task level, by time period and by time and active tasks in that time period. This can mean that a more complex project can be broken up into more manageable and understandable chunks.

ORIGINAL PROJECT

MODULE 1
Activities
Tasks
Deliverables

MODULE 2
Activities
Tasks
Deliverables

MODULE 3
Activities
Tasks
Deliverables

Segmentation – Split by time   2/3

You can segment your project by time period. For example, get a separate worksheet for each day, week, month or quarter.

ORIGINAL PROJECT

WEEK 1
Modules
Activities
Tasks
Deliverables

WEEK 2
Modules
Activities
Tasks
Deliverables

WEEK 3
Modules
Activities
Tasks
Deliverables

Segmentation – Time and active tasks   3/3

You can also segment your project by time period and only `oSheet(1) = oBook.Worksheets(1)` active tasks in that time period. This is also really handy in keeping what's really important in focus during the timeframe in which it is important.
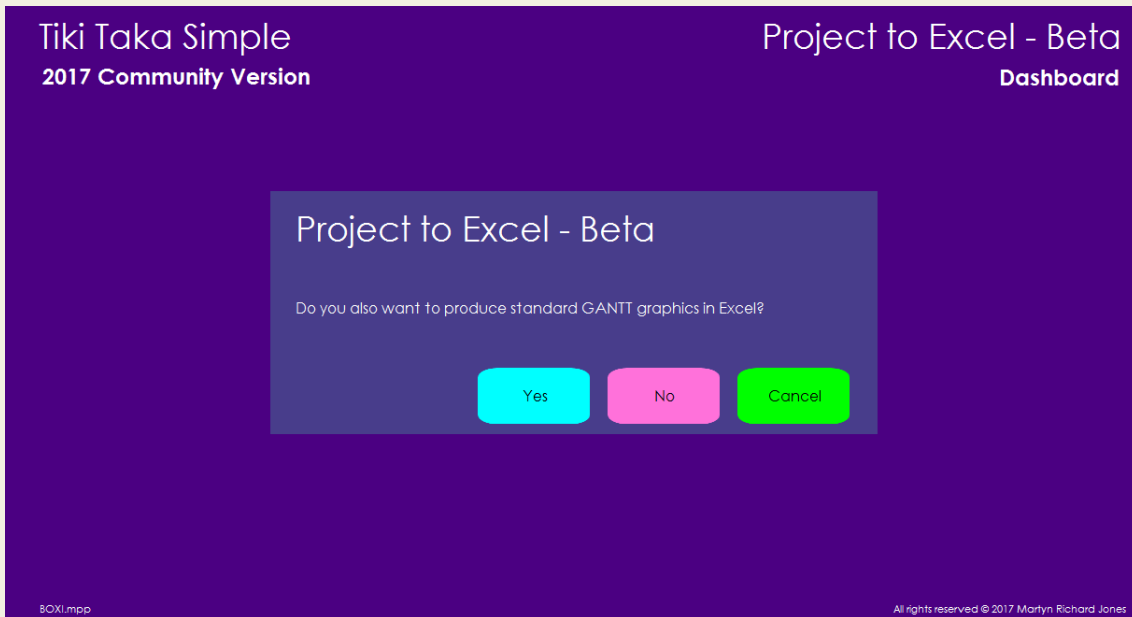
ORIGINAL PROJECT

ACTIVE MONTH 1	ACTIVE MONTH 2	ACTIVE MONTH 3
Modules	Modules	Modules
Activities	Activities	Activities
Tasks	Tasks	Tasks
Deliverables	Deliverables	Deliverables

So, there you have it. It really is that simple. Now we shall look at some worked examples.

Worked examples

Do it

When we have loaded up an MPP file and clicked on "Do it" this is what we see:

Basically, we are being asked if we want to produce the schedule with or without a Gantt chart. We can choose:

1. Yes – give me a Gantt chart.
2. No – don't include a Gantt – just schedule text
3. Cancel – I didn't want to be here in the first place.

As we want to produce the whole thing, we click on 'Yes'.

We'll see this 'thinking about it' window for a short (or long while), depending on the size and complexity of the project.
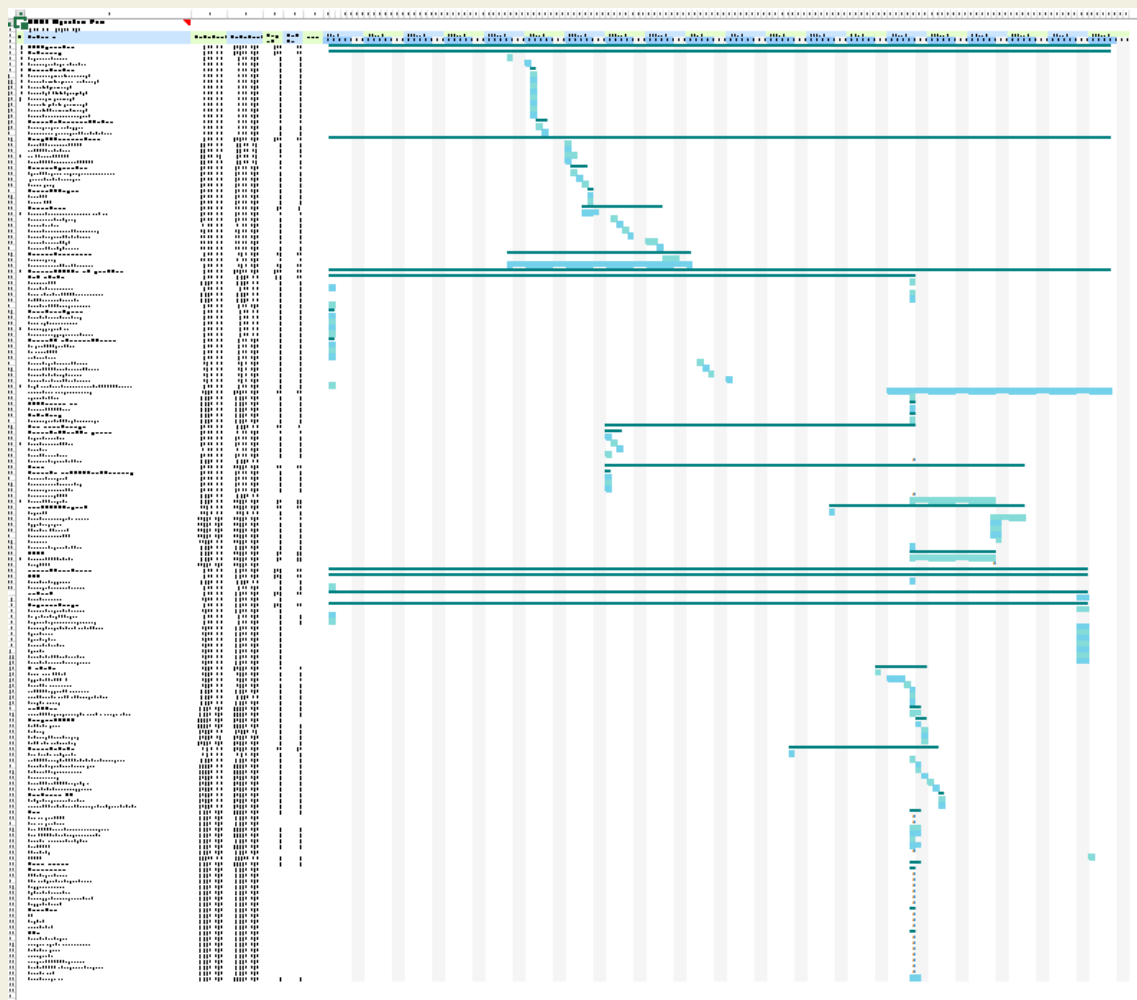
Then, Microsoft Excel should automatically open and present the completed schedule to us.

Using default settings on the dashboard, the Excel output worksheet should looks similar to this:

cambriano energía

The big picture, in this case, looks a bit like this:

You get the idea.

Another example

For this example I am going to load up a comprehensive and dated plan for an Enterprise Data Warehouse programme.

cambriano energía

1. First, I select the file
2. Then I change the project start date from Friday 3rd November 2000 to 4th July 2017
3. And select task levels 1 through 2 only
4. Then I click on 'Do it'

This is what is produced (partial view):

And if we reset the task levels from 1 to 3 we get this:

Then if I choose a timescale of weeks rather than days, my project output looks like this:

Pretty neat, eh?

An example of segmentation

Now, I will demonstrate another option, segmentation.

If I want to produce an output that splits the project up into one weeks, so that I get one project week per Excel worksheet, I can do that for all tasks, or I can do that for tasks that are active during the aforementioned weeks.

For that I simply choose the option "Split active tasks by week" on the "Active task time split" drop down list. Then this is what I get:

First, a table of contents with clickable links:

Then for each week of the project there is a worksheet that contains the active tasks for that week. For example, week 44 looks like this (excerpt):

	A	B	C	D	E	F	G	H I J K L M N
1	Main	Data Warehouse Project - Segment: 44/2017						
2		04/07/2017 08:00:00 - 09/02/2018 08:00:00						
3		Segment start: Monday - 30/10/2017 08:00:00						44/2017
4	ID	Task name	Scheduled star	Scheduled end	Elapsed days	Work days	>>>	M T W T F S S
5	1	Data Warehouse Project	04/07/2017 08:00	09/02/2018 08:00	220	159		
6	156	M - Data Warehouse Management Phase	15/08/2017 17:00	01/02/2018 17:00	170	123		
7	204	M2 - Data Warehouse Management and Administration	23/08/2017 08:00	01/02/2018 17:00	162	117		
8	205	M2.1 - Manage the Current Implementation Project Plan	23/08/2017 08:00	01/02/2018 17:00	162	117		
9	206	Manage Scope, Schedule & Staff	23/08/2017 08:00	01/02/2018 17:00	162	117		
10	306	D - Design Phase	14/09/2017 17:00	17/11/2017 17:00	64	47		
11	490	D7 - Data Warehouse Technical Environment Design	02/10/2017 08:00	17/11/2017 17:00	46	35		
12	509	D7.2 - Develop Technical Configurations	23/10/2017 08:00	03/11/2017 17:00	11	10		
13	510	Develop Technical Configuration Specs. For Each Component	23/10/2017 08:00	03/11/2017 17:00	11	10		
14	511	D7.b - Technical Cofigurations	03/11/2017 17:00	03/11/2017 17:00	0	0		

And an expanded view would be as follows:

	A	B	C	D	E	F	G	H I J K L M N
1	Main	Data Warehouse Project - Segment: 44/2017						
2		04/07/2017 08:00:00 - 09/02/2018 08:00:00						
3		Segment start: Monday - 30/10/2017 08:00:00						44/2017
4	ID	Task name	Scheduled star	Scheduled end	Elapsed days	Work days	>>>	M T W T F S S
5	1	Data Warehouse Project	04/07/2017 08:00	09/02/2018 08:00	220	159		
6	156	M - Data Warehouse Management Phase	15/08/2017 17:00	01/02/2018 17:00	170	123		
7	204	M2 - Data Warehouse Management and Administration	23/08/2017 08:00	01/02/2018 17:00	162	117		
8	205	M2.1 - Manage the Current Implementation Project Plan	23/08/2017 08:00	01/02/2018 17:00	162	117		
9	206	Manage Scope, Schedule & Staff	23/08/2017 08:00	01/02/2018 17:00	162	117		
10	306	D - Design Phase	14/09/2017 17:00	17/11/2017 17:00	64	47		
11	490	D7 - Data Warehouse Technical Environment Design	02/10/2017 08:00	17/11/2017 17:00	46	35		
12	509	D7.2 - Develop Technical Configurations	23/10/2017 08:00	03/11/2017 17:00	11	10		
13	510	Develop Technical Configuration Specs. For Each Component	23/10/2017 08:00	03/11/2017 17:00	11	10		
14	511	D7.b - Technical Cofigurations	03/11/2017 17:00	03/11/2017 17:00	0	0		
15	512	D7.3 - Acquire All Technical Components	03/11/2017 17:00	17/11/2017 17:00	14	11		
16	514	Finalize Pricing For Each Purchase Order	03/11/2017 17:00	03/11/2017 17:00	0	0		
17	515	Place Orders With Vendors	03/11/2017 17:00	03/11/2017 17:00	0	0		
18	516	Receive Components	03/11/2017 17:00	03/11/2017 17:00	0	0		
19	518	C - Construction	20/10/2017 17:00	26/12/2017 17:00	67	48		
20	519	C1 Technical Environment Prep	23/10/2017 08:00	03/11/2017 17:00	11	10		
21	520	C.1.1 - Prepare DW Development Env	23/10/2017 08:00	30/10/2017 17:00	7	6		
22	521	Install, Configure & Test Computing Hardware	23/10/2017 08:00	30/10/2017 17:00	7	6		
23	527	C1.a - Data Acquisition Developer Workstations	30/10/2017 17:00	30/10/2017 17:00	0	0		
24	528	C1.b - Data Access Developer Workstations	30/10/2017 17:00	30/10/2017 17:00	0	0		
25	529	C1.c - Development Environment Installed and Available	30/10/2017 17:00	30/10/2017 17:00	0	0		
26	530	C1.2 - Prepare DW Processing Env	23/10/2017 08:00	03/11/2017 17:00	11	10		
27	531	Install, Configure & Test Computing Hardware	23/10/2017 08:00	03/11/2017 17:00	11	10		
28	537	C1.d - Processing Environment Installed and Available	03/11/2017 17:00	03/11/2017 17:00	0	0		
29	538	C1.e - Database and Database Objects	03/11/2017 17:00	03/11/2017 17:00	0	0		
30	539	C1.f - Sample Data for Construction	03/11/2017 17:00	03/11/2017 17:00	0	0		
31	540	C1.g - Information Directory	03/11/2017 17:00	03/11/2017 17:00	0	0		
32	541	C1.h - Network Interconnectivity	03/11/2017 17:00	03/11/2017 17:00	0	0		
33	550	C2 - Data Acquisition Processing Construction	31/10/2017 08:00	20/11/2017 17:00	20	15		
34	551	C2.1 - Develop Atomic Data Acquisition Programs, Processes and Proce	31/10/2017 08:00	20/11/2017 17:00	20	15		
35	552	Develop Pseudocode	31/10/2017 08:00	20/11/2017 17:00	20	15		
36	553	Code Programs	31/10/2017 08:00	31/10/2017 08:00	0	0		
37	554	Compile Programs	31/10/2017 08:00	31/10/2017 08:00	0	0		
38	555	Unit Test	31/10/2017 08:00	31/10/2017 08:00	0	0		
39	556	Capture / Create Meta Data	31/10/2017 08:00	31/10/2017 08:00	0	0		
40	558	C2.2 - Develop Atomic Level Post-Load Programs, Processes and Proce	31/10/2017 08:00	13/11/2017 17:00	13	10		
41	559	Develop Pseudocode	31/10/2017 08:00	13/11/2017 17:00	13	10		
42	560	Code Programs	31/10/2017 08:00	31/10/2017 08:00	0	0		
43	561	Compile Programs	31/10/2017 08:00	31/10/2017 08:00	0	0		
44	562	Unit Test	31/10/2017 08:00	31/10/2017 08:00	0	0		
45	563	Capture / Create Meta Data	31/10/2017 08:00	31/10/2017 08:00	0	0		
46	566	C2.3 - Develop Secondary Level Data Acquisition Programs, Processes	31/10/2017 08:00	13/11/2017 17:00	13	10		
47	567	Develop Population Scripts	31/10/2017 08:00	13/11/2017 17:00	13	10		

Finally, the last worksheet of the workbook contains a list of people/resources and days utilised. For example:

cambriano energía

	A	B	C	D
1	Main	Data Warehouse Project		
2		(04/07/2017 08:00:00 - 09/02/2018 08:00:00)		
3				
4	ID	Resource name / Person name	Used in project	Days deployed
5	1	Business Requirements Analyst	Yes	119
6	2	Data Acquisition Developers	Yes	111
7	3	DW Access Developers	Yes	75
8	4	DW Data Architect	Yes	90
9	5	DW Data Base Administrator	Yes	173
10	6	DW Project Manager	Yes	340
11	7	DW Technical Architect	Yes	144
12	8	End Users	Yes	18
13	9	Meta Data Manager	Yes	76
14	10	Operational Support Staff	Yes	71
15	11	Project Director	Yes	64
16	12	Source System Expert	Yes	23
17	13	Subject Matter Expert	Yes	124
18	14	DW Administrator	No	0
19				

That more wraps up the brief run through. The next section summarises the current configurable facets and options.

Option Summary

Use timescale

Current options:

- Days
- Weeks
- Months
- Quarters

Show task levels

Current options:

- All levels
- 1 and 2
- 1 to 3
- 1 to 4
- 1 to 5
- 1 to 6
- 1 to 7

Task level split – output segmentation

Current options:

- No task split
- Split tasks at level 2
- Split tasks at level 3
- Split tasks at level 4

Time split – output segmentation

Current options:

- No time split
- Split by week
- Split by month

Active task time split – output segmentation

Current options:

- No active task time split
- Split active tasks by week
- Split active tasks by month

Change requests

Community Versions

Change requests may be made by users of Community versions of Tiki Taka Simple applications, including but not limited to the Community Versions of Project to Excel, Week in focus, P2E Agile and P2E Plan Analysis.

Corporate Versions

Corporate versions of Tiki Taka Simple applications will be subject to individual contract conditions. These are subject to negotiation and agreement and this is done so on a case by case basis.

Contact

You can contact Martyn Jones with Project to Excel related requirements at projecttoexcel@gmail.com

The product blog can be found here: http://projecttoexcel.wordpress.com/ and it is where you may also leave comments on the product described here.

Please do not hesitate to get in touch for any requirement you may have.

cambriano energía

Appendix

Disclaimer

EXCEPT WHERE EXPRESSLY PROVIDED OTHERWISE, THE SITE, AND ALL CONTENT PROVIDED BY CAMBRIANO LTD, ARE PROVIDED ON AN "AS IS" AND "AS AVAILABLE" BASIS. CAMBRIANO EXPRESSLY DISCLAIMS ALL WARRANTIES OF ANY KIND, WHETHER EXPRESS OR IMPLIED, INCLUDING, BUT NOT LIMITED TO, THE IMPLIED WARRANTIES OF MERCHANTABILITY, FITNESS FOR A PARTICULAR PURPOSE AND NON-INFRINGEMENT WITH RESPECT TO THE SITE AND ALL CONTENT PROVIDED ON OR THROUGH THE SITE. CAMBRIANO MAKES NO WARRANTY THAT: (A) THE SITE OR CONTENT WILL MEET YOUR REQUIREMENTS; (B) THE SITE WILL BE AVAILABLE ON AN UNINTERRUPTED, TIMELY, SECURE, OR ERROR-FREE BASIS; (C) THE RESULTS THAT MAY BE OBTAINED FROM THE USE OF THE SITE OR ANY CONTENT PROVIDED ON OR THROUGH THE SITE WILL BE ACCURATE OR RELIABLE; OR (D) THE QUALITY OF ANY CONTENT PURCHASED OR OBTAINED BY YOU ON OR THROUGH THE SITE WILL MEET YOUR EXPECTATIONS.

ANY CONTENT ACCESSED, DOWNLOADED OR OTHERWISE OBTAINED IS USED AT YOUR OWN DISCRETION AND RISK. CAMBRIANO SHALL HAVE NO RESPONSIBILITY FOR ANY DAMAGE TO YOUR COMPUTER SYSTEM OR LOSS OF DATA THAT RESULTS FROM THE DOWNLOAD OR USE OF CONTENT.

CAMBRIANO RESERVES THE RIGHT TO MAKE CHANGES OR UPDATES TO, AND MONITOR THE USE OF, THE SITE AND CONTENT PROVIDED ON OR THROUGH THE SITE AT ANY TIME WITHOUT NOTICE.

Limitation of Liability

IN NO EVENT SHALL CAMBRIANO BE LIABLE FOR ANY DIRECT, INDIRECT, INCIDENTAL, SPECIAL OR CONSEQUENTIAL DAMAGES, OR DAMAGES FOR LOSS OF PROFITS, REVENUE, DATA OR DATA USE, INCURRED BY YOU OR ANY THIRD PARTY, WHETHER IN AN ACTION IN CONTRACT OR TORT, ARISING FROM YOUR ACCESS TO, OR USE OF, THE SITE OR ANY CONTENT PROVIDED ON OR THROUGH THE SITE.

Exclusions and Limitations

SOME JURISDICTIONS DO NOT ALLOW THE DISCLAIMER OR EXCLUSION OF CERTAIN WARRANTIES OR THE DISCLAIMER, EXCLUSION OR LIMITATION OF CERTAIN LIABILITIES. TO THE EXTENT THAT THEY ARE HELD TO BE LEGALLY INVALID, DISCLAIMERS, EXCLUSIONS AND LIMITATIONS SET FORTH IN THESE TERMS OF USE, INCLUDING THOSE SET FORTH IN SECTIONS 13 AND 14, DO NOT APPLY AND ALL OTHER TERMS SHALL REMAIN IN FULL FORCE AND EFFECT.

Export Restrictions/Legal Compliance

You may not use any of the software or content provided by Cambriano in violation of EU or USA export laws or regulations, or in violation of any other applicable laws or regulations. You agree to comply with all export laws, restrictions and regulations of any EU, United States or applicable agency or authority, and to not directly or

indirectly provide or otherwise make available any services and products of Cambriano in violation of any such restrictions, laws or regulations, including, without limitation, laws, restrictions or regulations pertaining to the development, design, manufacture or production of nuclear, chemical or biological weapons or missile technology. As applicable, you shall obtain and bear all expenses related to any necessary licenses, authorizations, and/or exemptions with respect to your own use of the services of Cambriano outside the EU/USA. Neither the services or products of Cambriano nor the underlying information or technology may be downloaded or otherwise provided or made available, either directly or indirectly, into any country subject to U.S. trade sanctions, (Supplement No. 1 to Part 740, Export Administration Regulations, Country Group E:1), to individuals or entities controlled by such countries, or to nationals or residents of such countries other than nationals who are lawfully admitted permanent residents of countries not subject to such sanctions. By agreeing to these Terms of Use, you agree to the foregoing and represent and warrant that you are not located in, under the control of, or a national or resident of any such country or on any such list.