

**Afinion**



# **USER MANUAL**

## **Afinion Project-Viewer for Microsoft Office Project, Excel and SAP PS Version 5.1**

Copyright

© 2004 – 2009 Afinion AG

All rights reserved

Afinion AG  
Giessenstrasse 13  
CH-5322 Koblenz

Tel: +41 56 267 40 50  
Fax: +41 56 267 40 51  
eMail: [info@afinion.ch](mailto:info@afinion.ch)





## Table of Contents

1	Set-up of Afinion Project-Viewer.....	4
1.1	Download and Installation.....	4
1.2	Start, Restart and Termination.....	5
1.3	Read In License Key.....	5
1.4	Language and Version Setup.....	7
1.5	Server Configuration.....	8
1.6	Windows Roaming User, Terminal Server, Citrix.....	8
1.6.1	Introduction.....	8
1.6.2	Microsoft Windows Terminal Server and Citrix MetaFrame/XenApp.....	9
2	Viewing Projects with Afinion Project-Viewer.....	10
2.1	General.....	10
2.2	Set-up of File Types and File Access.....	10
2.2.1	Afinion Project-Viewer with .mpp and .xls .....	10
2.2.2	Using the Connection Manager.....	10
2.3	Operation.....	17
2.3.1	General .....	17
2.3.2	Resource Controlled Display.....	20
2.3.3	The Toolbar of Afinion Project-Viewer.....	21
2.3.4	Change / Adjust the Table View.....	22
2.3.5	Enlarge / Reduce the Bar Chart (Gantt).....	22
2.3.6	Setting of Magnifying Button.....	22
2.3.7	Modifying Section Width.....	24
2.3.8	Setting the Date Format.....	25
3	Time Recording.....	26
3.1	General.....	26
3.2	First Steps.....	26
3.2.1	Basic Decisions.....	26
3.2.2	Expand Time Phased Data in Microsoft Project.....	26
3.2.3	Entering Windows Users in Microsoft Project.....	27
3.2.4	Field Mapping.....	27
3.3	Using Time Recording.....	29
3.3.1	View Progress in Microsoft Project.....	30
4	Afinion Project-Viewer and Outlook.....	32
4.1	Exporting Activities to Outlook.....	32
4.2	Customising Outlook.....	32
5	Printing with the Afinion Project-Viewer.....	36
6	User Specific Information .....	39
6.1	Windows (Roaming User, Terminal Server, Citrix).....	39
6.2	Linux, Mac OS X, Solaris, and other Unix-Versions.....	39
7	Application Termination.....	40
8	Deinstallation of Afinion Project-Viewer.....	41



# 1 Set-up of Afinion Project-Viewer

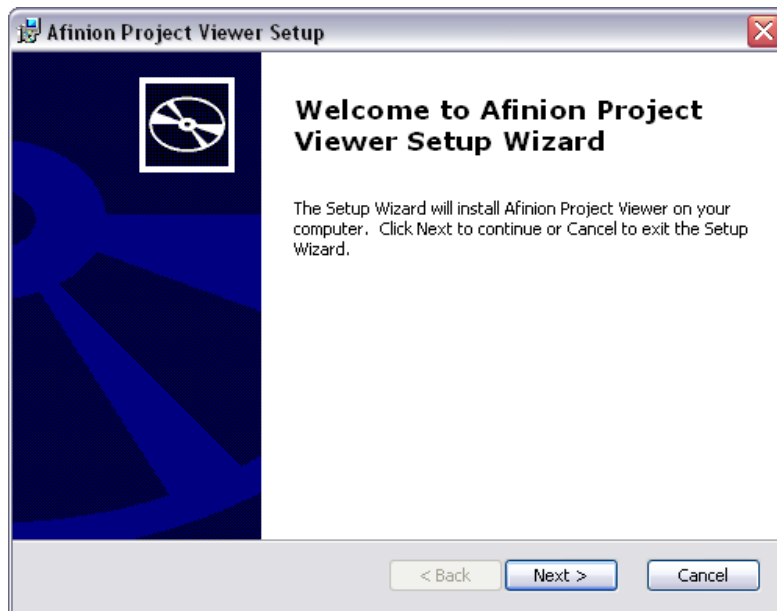
## 1.1 Download and Installation

Afinion Project-Viewer may be downloaded from our homepage <http://www.afinion.com> or the homepages of our distributors.

Extensive information as well as the download link is available at Software → Afinion Project-Viewer. As Afinion Project-Viewer is a Java application, it can be used on Windows PC, Mac (OS/X), Linux and other Unix derivatives. Export to Outlook and access to Microsoft Office Project Database (or Access respectively) is only possible on the Windows operating system.

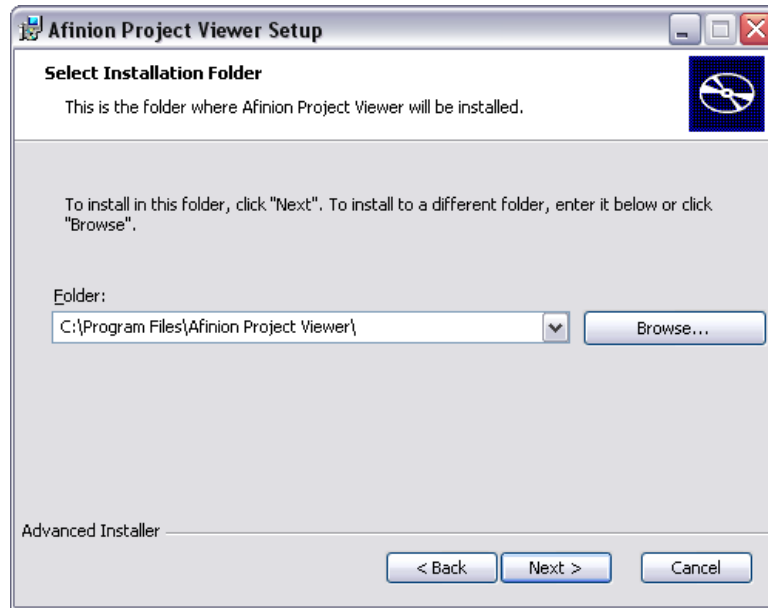
**Important:** If you want to view SAP PS plans and if the SAP GUI is installed on your computer, please read the installation instruction to be found on our homepage before continuing.

Download the file Project-Viewer.exe (Windows) and then start it by double-click.



Next you can associate .mpp files with Afinion Project-Viewer and then select the programme short cuts.

Now enter the path where you want to store the application in the following form. The default path is „C:\Program Files\Afinion Project-Viewer\“. You can change the target directory by clicking on *Browse...*



The target directory will be created automatically, if it does not exist.

In the following window click *Install*.

In the final window click *Finish* to complete the configuration.

## 1.2 Start, Restart and Termination

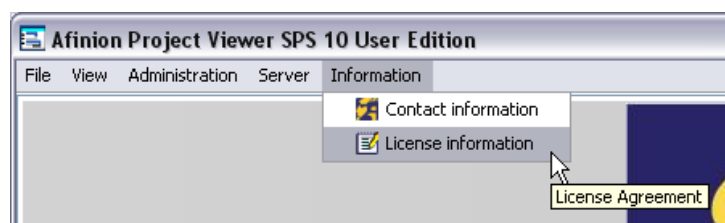
Click on a shortcut either on the desktop or in the program menu in order to start the Viewer. The Viewer icon is now visible in the system tray.

When you exit the application, the tray icon remains and it will stay there until you either close it (right-click, click *Close fully*) or shut down the computer. To restart the Viewer, click on the system tray icon. This is much faster, since all the start-up files do not have to be reloaded. You can terminate application and system tray together by going to menu *File* → *Close fully* or right-clicking the tray icon and clicking *Close fully*.

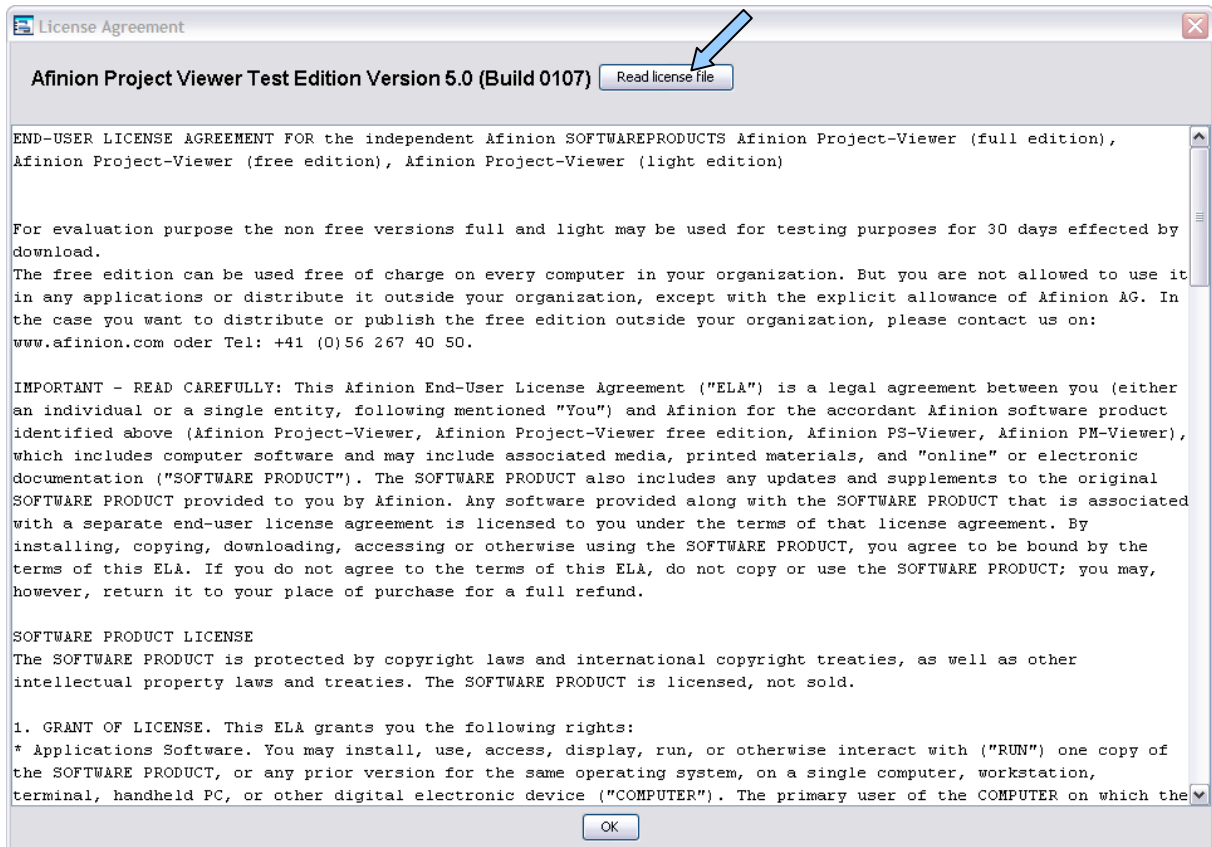
## 1.3 Read In License Key

Save the license key that you have received by e-mail on your hard disk.

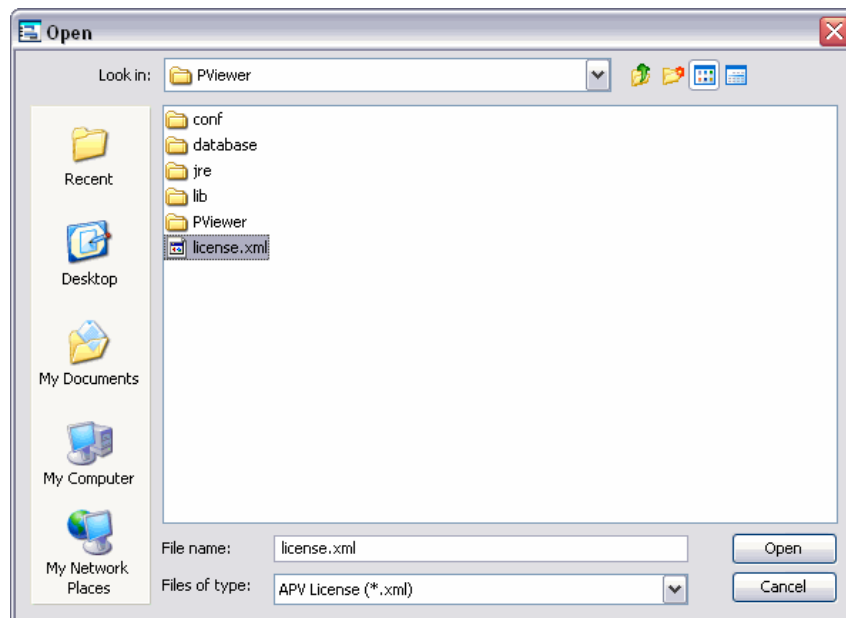
Start Afinion Project-Viewer and open menu *Information* → *License information*.



Read the license conditions and click *Read license file*.



Now select the license file and click Open.



Confirm the message about the successful installation by clicking OK and then OK again in the license window. Now terminate the application completely (Menu *File* → *Close fully*).

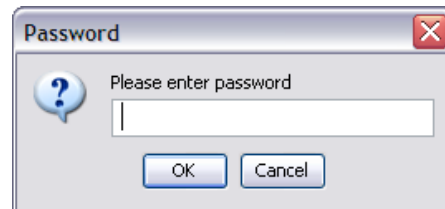
After restarting the application the message about the remaining test period should have disappeared and you should see the license information in the blue bar below the menu bar.



In case you are unable to read in the license file, you probably don't have write permissions in the directory so that the programme cannot save the license key. In such a case contact your administrator.

## 1.4 Language and Version Setup

Go to menu *Administration*. You are then asked to enter the administrator password.

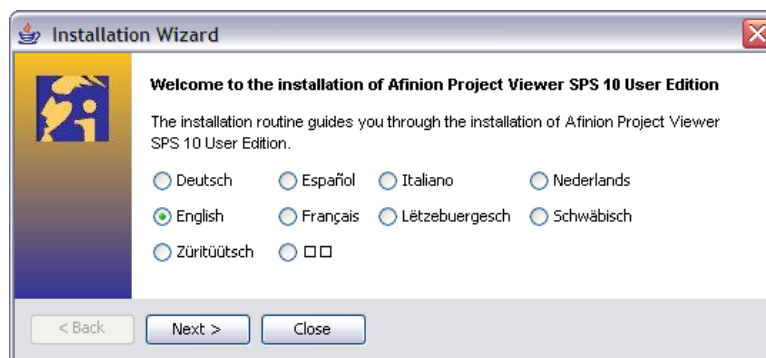


Since there is no initial password set just click *OK*.

Now go to menu *Administration > Change installation*.

The following windows guide you through the configuration of the Afinion Project-Viewer.

First select the language.

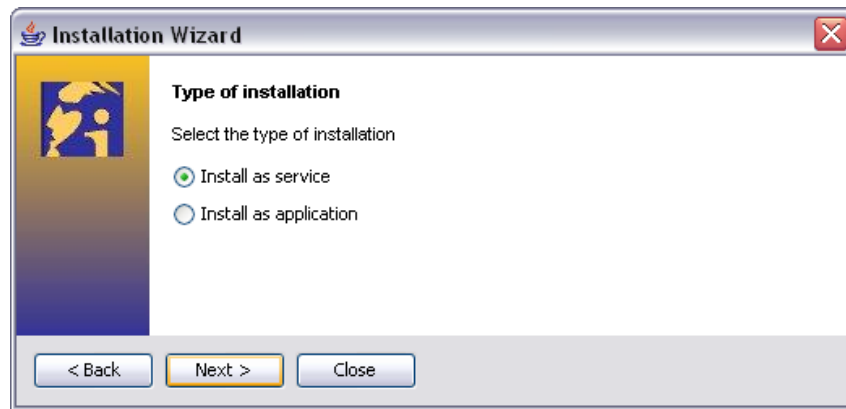


The next window lets you select between installation as a service or installation as an application.

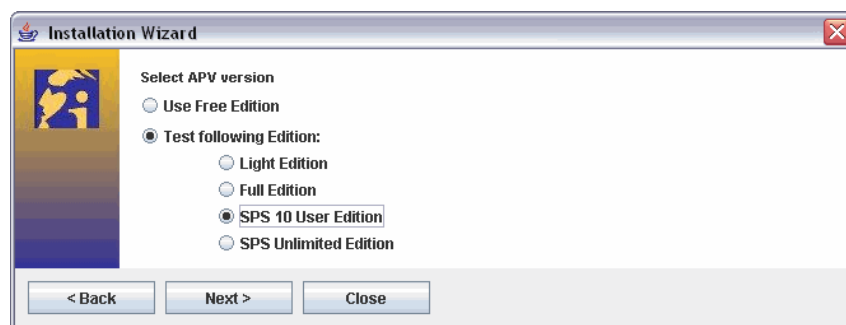
### Explanation:

When installing the Afinion Project-Viewer as a service it will be loaded into system memory at computer start up. An icon in the system tray (on the right at the bottom of the screen) will show its presence. A single click on the icon immediately opens the Viewer. If the Viewer is the default application for .mpp files, a double click on an .mpp file will open the file instantly.

When installing the Viewer as an application it will only be loaded when either clicking on a startup icon or by double clicking a .mpp file.



As long as you have not read in a purchased license key, you are then asked which version you want to test.



**Important:** You can test every version for 30 days by selecting the version in this window. After 30 days the application will continue to work as free edition. If you would like to continue testing the application, you can request a special test key by e-mail to [info@afinion.com](mailto:info@afinion.com), by calling +41 (0)56 267 4050 or by faxing to +41(0)56 267 4051.

In the next step you can associate standard Microsoft Office Project files (.mpp) with Afinion Project-Viewer.

Please note: Only check this box, if Microsoft Office Project is **not** installed on your computer. Otherwise a double-click on an .mpp file will always start the viewer and not Project.

## 1.5 Server Configuration

The initial password required to enter the Server configuration is **APV!**. This password is independent of the Administration password and is identical for all users of the server functionality, ie Time Recording and Smart Project Server. For details see Chapter 3 and Smart Project Server manual.

## 1.6 Windows Roaming User, Terminal Server, Citrix

### 1.6.1 Introduction

By default all user specific Information of the configuration file is saved in the user profile. This allows for

- several users of a pc to work with their individual settings,
- installation of Afinion Project-Viewer on a server drive, several users to work with the programme and thereby use their own settings,



- use of Roaming User,
- use of Terminal Server or Citrix MetaFrame Server.

## 1.6.2 Microsoft Windows Terminal Server and Citrix MetaFrame/XenApp

In order to use Afinion Project-Viewer with Microsoft Windows Terminal Server or Citrix Metaframe/XenApp instead of the standard start-up file ProjectViewer.exe the file **ProjectViewerS.exe** has to be used.

- In order to link this version of Afinion Project-Viewer to .mpp files proceed as follows:
  - Open Windows Explorer, Menu *Tools > Folder Options...*
  - Select *File Types* and scroll down to *MPP*
  - Click *Change...* and then *Browse...*
  - Locate and select *ProjectViewerS.exe*, by default it is located in *C:\Program Files\Afinion\Afinion Project-Viewer*
- In order to link the shortcuts on the desktop, in the Quick Launch toolbar and the programs menu, right-click the shortcut, select *Properties* and then change the target field from  
"C:\Program Files\Afinion\Afinion Project-Viewer\ProjectViewer.exe"  
to  
"C:\Program Files\Afinion\Afinion Project-Viewer\ProjectViewer**S**.exe".

Note: These modifications can also be made prior to installation in the installation packet, which is temporarily stored in the folder *Application Data\Afinion\Afinion Project-Viewer\install* in the user profile.



## 2 Viewing Projects with Afinion Project-Viewer

### 2.1 General

After opening Afinion Project-Viewer you will see the startup screen with links to various documents and information. Via the menu *File* you can now open either a .mpp, a .xls file or a database. You can also open a project from an existing database or access a project from Smart Project Server via its security mechanisms. The latter is only available if you have licensed Smart Project Server.

### 2.2 Set-up of File Types and File Access

#### 2.2.1 Afinion Project-Viewer with .mpp and .xls

You can link to an .mpp or .xls plan directly:

- Go to menu *File > Open* and select the .mpp or .xls file

Alternatively

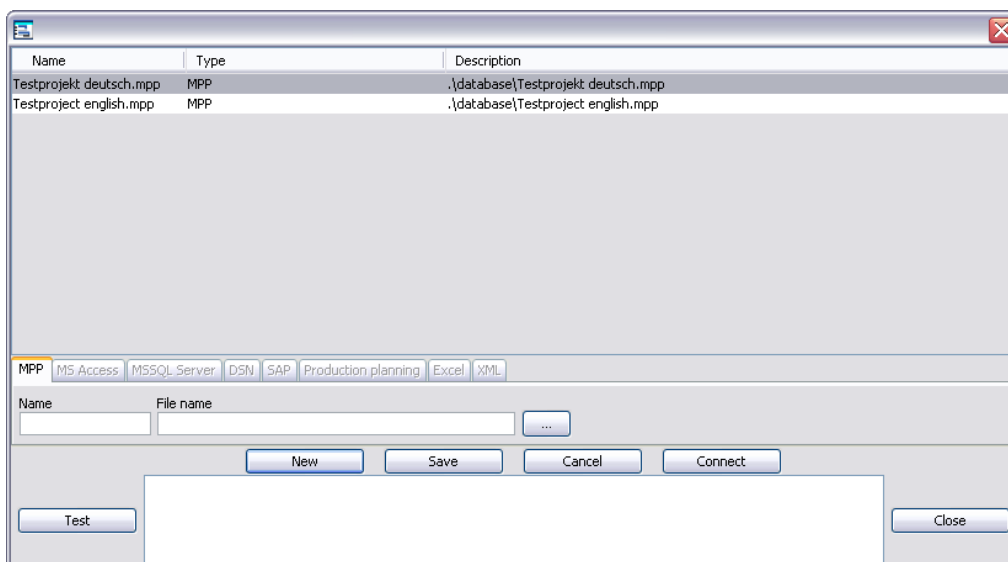
- Go to menu *File > Load Project*

#### 2.2.2 Using the Connection Manager

If you want to directly access a database using Afinion Project-Viewer select menu *File > Connection Manager*.

This menu opens a window which allows you to access a .mpp file, an Access or SQL Server database, a database via DSN, SAP, Excel and XML (Project 2007).

In order to create a connection to a database with Afinion Project-Viewer you first have to create this connection using the connection manager. There are eight different methods available to access project data for all the different methods you have to store the projects. The different methods are described in detail below.



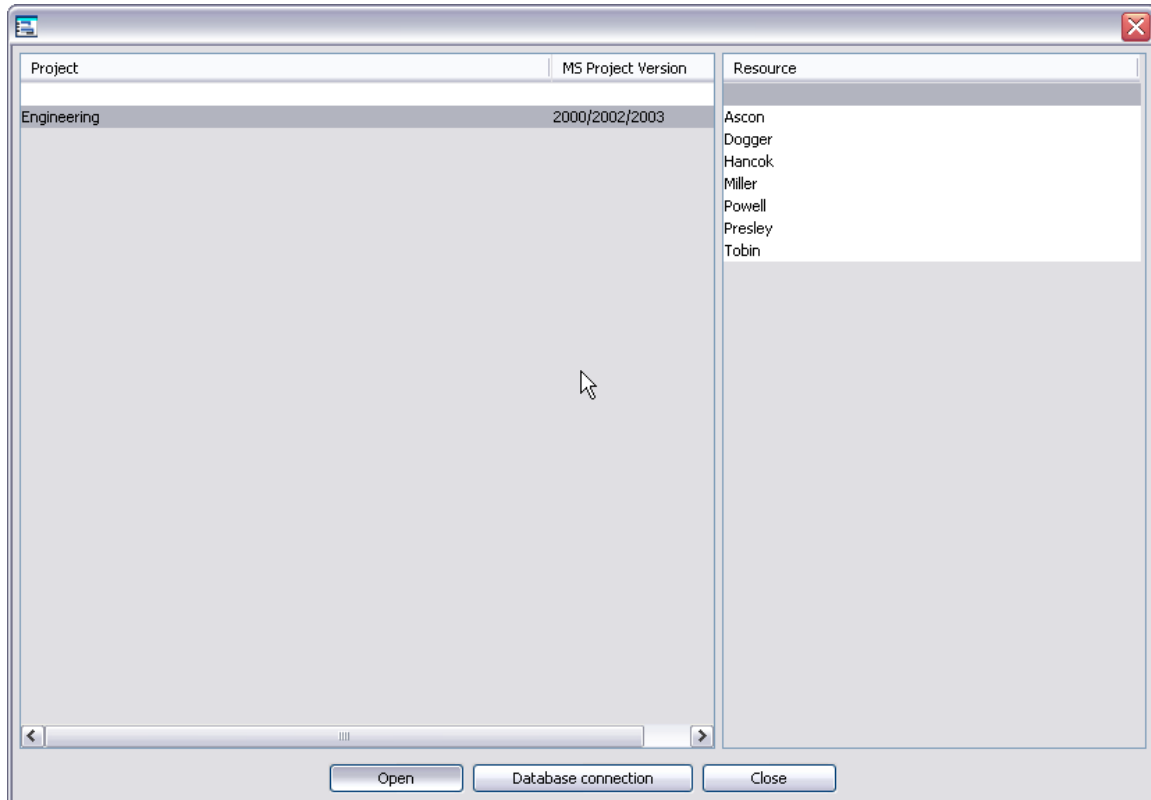
To create a new connection first click *New* and then select the correct tab (MPP, MS Access, ...). Now enter the required connection data and save your entries. Click *Connect* to finally create the connection to the database.

If you have previously saved the connection data, select the database from the list above and click *Connect*.



### 2.2.2.1 Projects in .mpp Format

- Click New and then select the *MPP* tab
- Press the button . Now an explorer window is opened where you can select the desired project.
- Click on Save to save the name and path in the list above.
- Click on Connect to open the following window:



This example is named "Engineering". Click on the project and press the button *Load*. If you (as shown in this example) have chosen not to select any resources, the whole content of the project will be displayed. You can pre-select a single resource so that only the activities to which that resource is assigned is shown.

Alternatively .mpp files can be opened directly as described in section 2.2.1.

### 2.2.2.2 MS Access Database

If you are using projects in Microsoft Access formats, ending with either .mpd or .mdb, proceed as follows:

- Go to menu *File > Connection Manager*
- Click on register *MS Access*
- Click on *New*
- Press the button . Now an explorer window is opened where you can select the desired database.

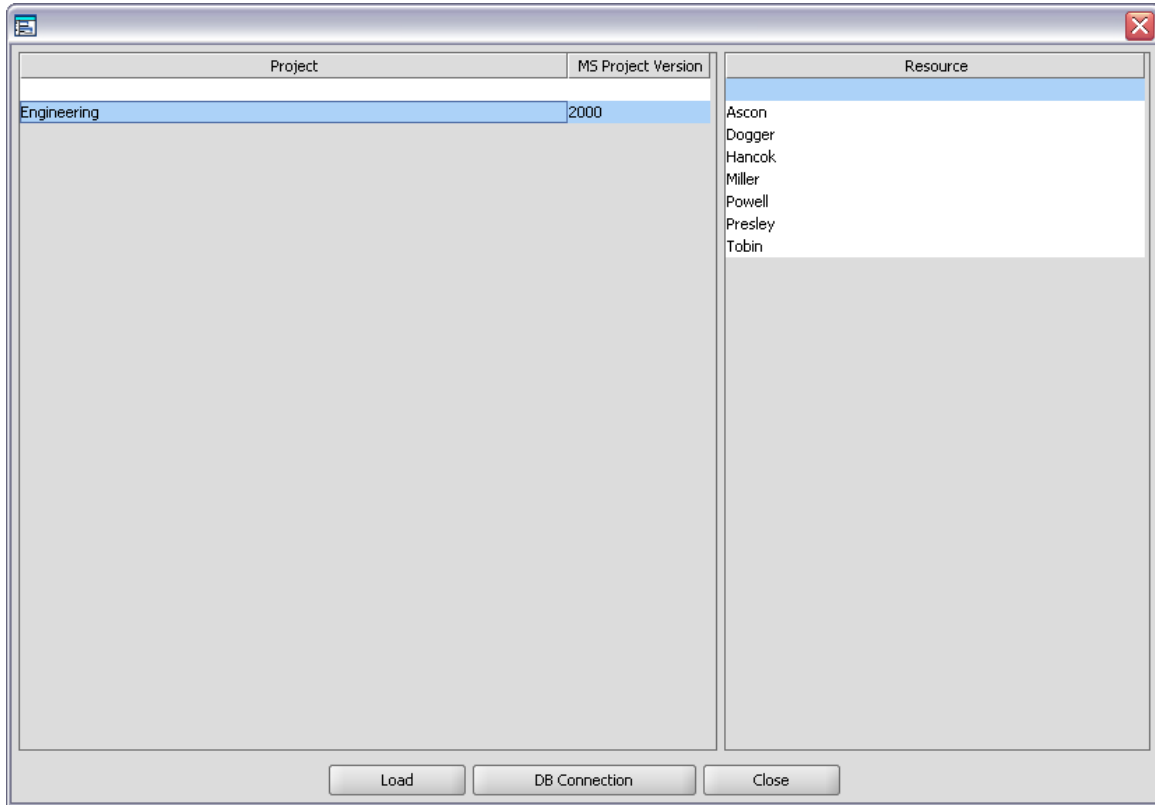
In order to ascertain that the link to the database works press the button *Test*. When you get the message "link checked – version available" you can save the test connection by pressing *Save*. Then press "Connect", to create a link to your database.



Note:

At this point of time "only" the link to the database was established, so that it doesn't have to be recreated every time you want to open the project. This link has no effect on the content of your database.

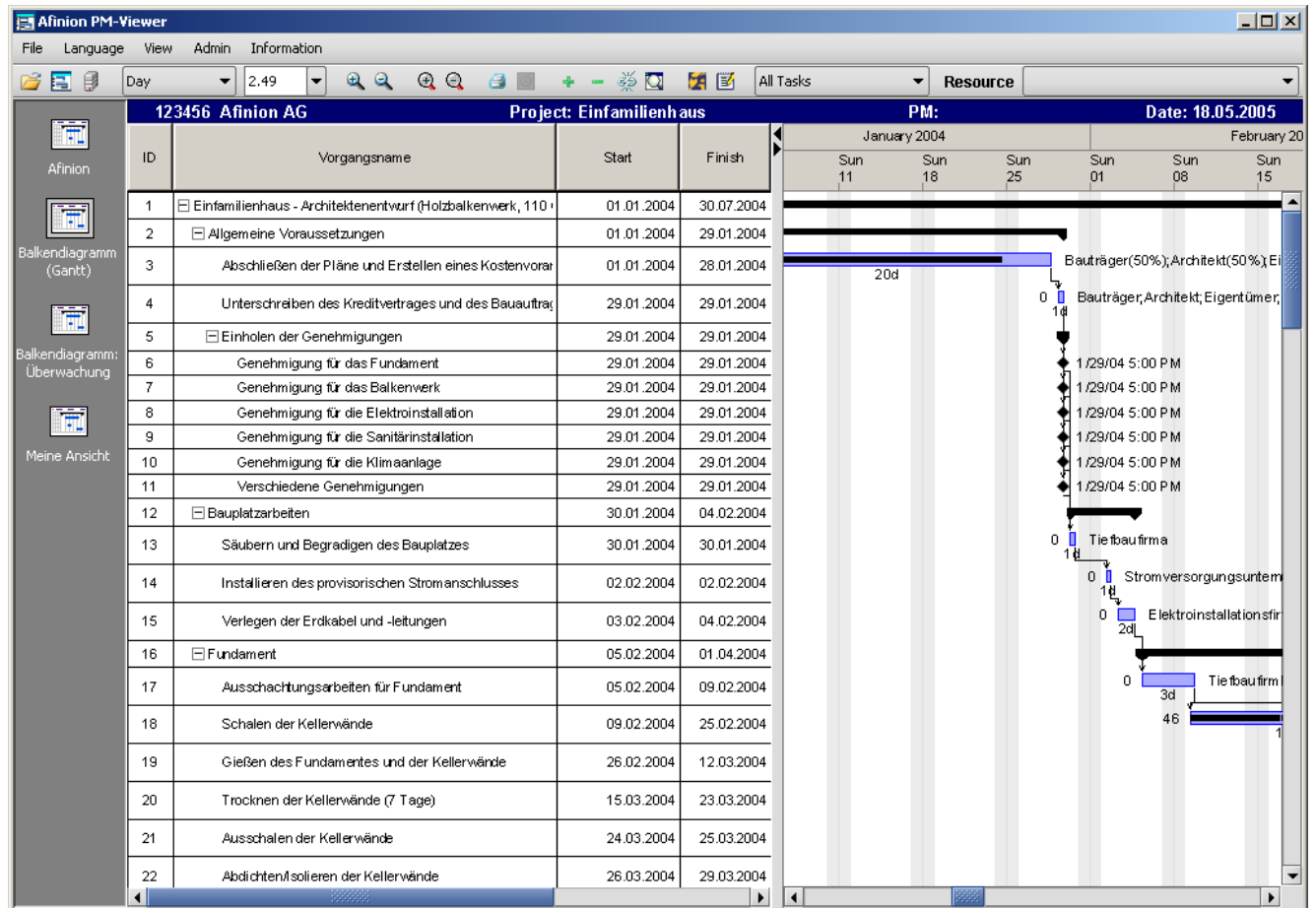
A new window is displayed, in which your link is shown.



This example is named "Engineering". Click on the project and press the button *Load*. If you (as shown in this example) have chosen not to select any resources, the whole content of the project will be displayed. Alternatively you can pre-select a single resource so that only the activities to which that resource is assigned is shown.



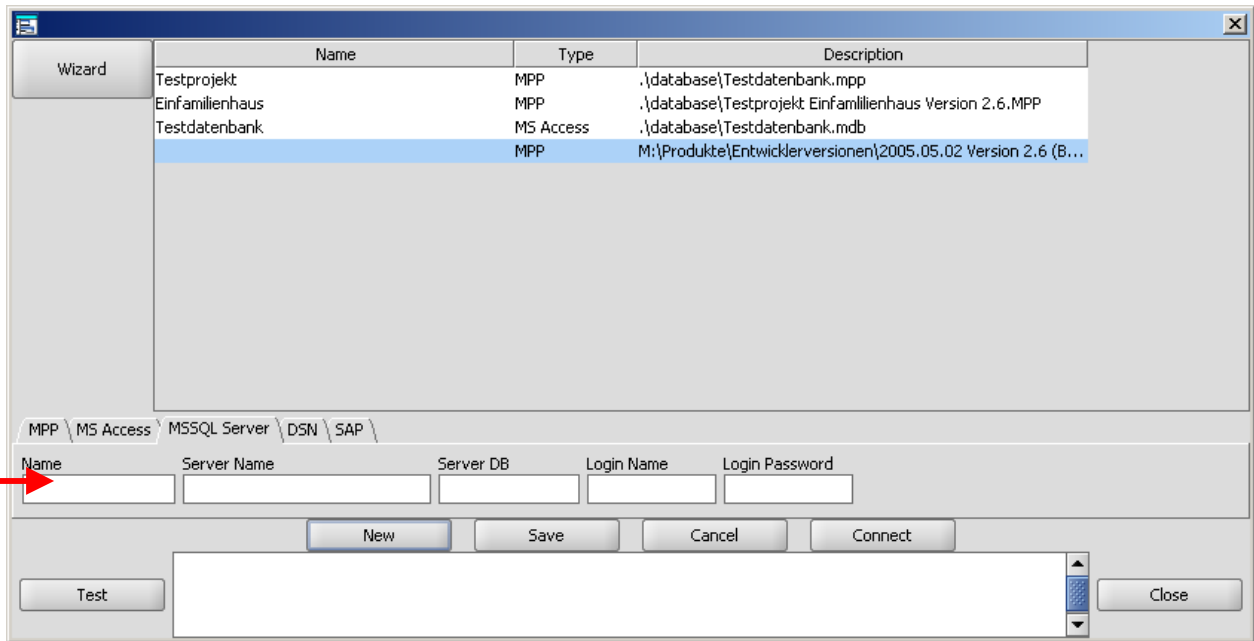
### Display of the complete databa se:



### 2.2.2.3 Afinion Project-Viewer with Microsoft SQL –Server

If you want to establish a link to an SQL database, please refer to your system administrator for him to make the appropriate settings. Depending on the structure of your EDP-System, you may require settings that cannot be provided by the Project Viewer.

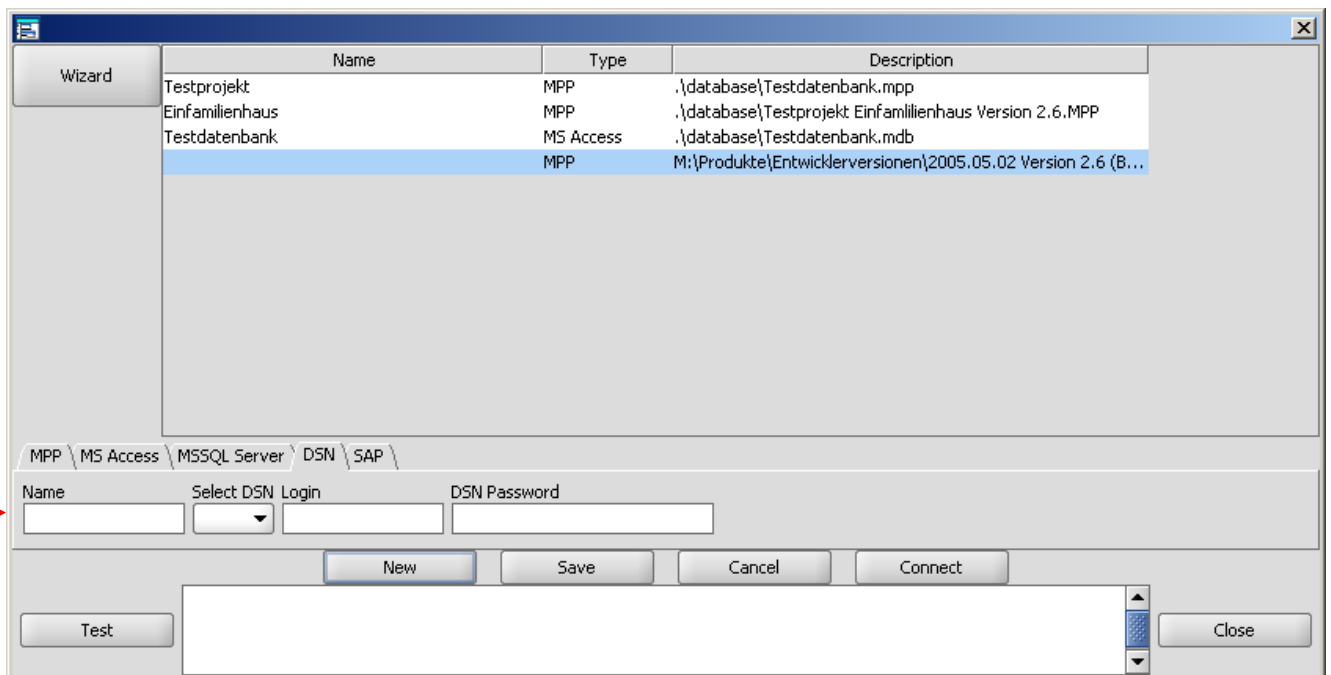
Start the Connection Manager, press New and then select the register MSSQL-Server.



By clicking on the button *Wizard* you or your EDP administrator can enter the necessary information, such as specific settings for the company and passwords. You can test the connection by pressing the button *Test*. If the connection is created, press *Save*. The connection is saved immediately. As soon as the link is created and saved, you can load the database.

#### 2.2.2.4 Afinion Project-Viewer with DSN Connection

If you want to create a link to a database over a DSN connection, please refer to your system administrator for the relevant settings. As stated above, we cannot provide you with the specifications of your company.



By clicking on the button *Wizard*, you or your EDP administrator can enter the necessary information, such as specific settings for the company and passwords. You can test the connection by pressing the button *Test*. If the connection is created, press



Save. The connection is saved immediately. As soon as the link is created and saved you can load the database.

### 2.2.2.5 Afinion Project-Viewer and SAP PS

#### Important:

There is no installation of SAP GUI required to run the Project Viewer.

**If you do have installed the SAP GUI**, please consider the following:

The Afinion Project-Viewer requires the file LibRfc32.dll Version 6206.6.1456.4314 or higher.

This file must be copied into the directory Windows\system32.

You will find the file in Afinion Project-Viewer installation directory. The default directory is:

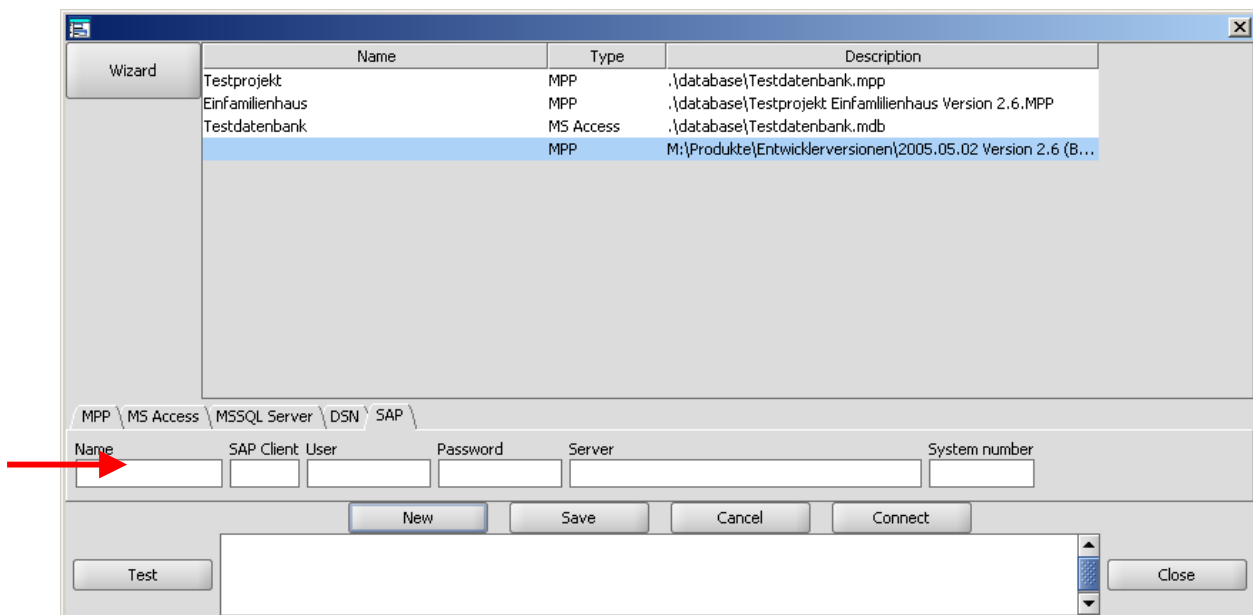
C:\Program Files\AfinionViewer\PViewer.

You can also download the file from SAP directly from

<http://service.sap.com/connectors>

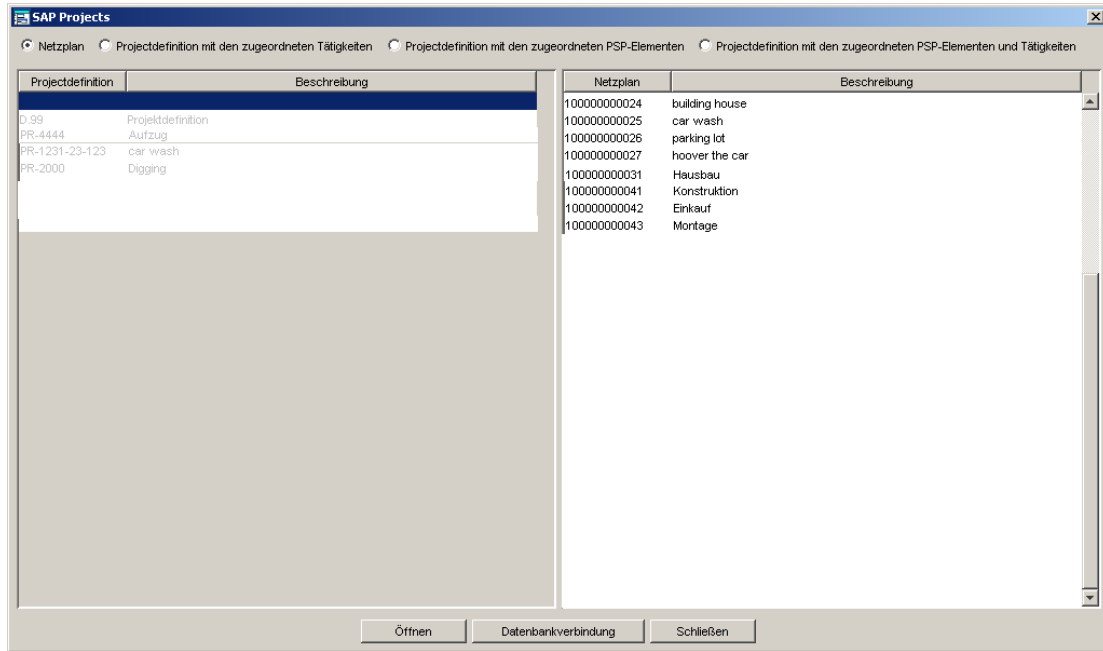
Go to SAP Java Connectors\Tools & Services | Download SAP JCo Release 2.1.3 | Windows 2000,... - 32 bit SAP JCo 2.1.3 and download it as zip file.

After copying the file into your Windows\system32 directory, you can create a connection to your SAP Server.



The Connection Manager offers the possibility to access a database of your choice. If you would like to access another database, you have to establish a new connection with the Connection Manager.

To check if the connection to the database is functioning, press the button *Test* first. If you receive the message "Connection tested", you can save your test-connection for the time being. Then press the button "Connect" to establish a connection to the database.



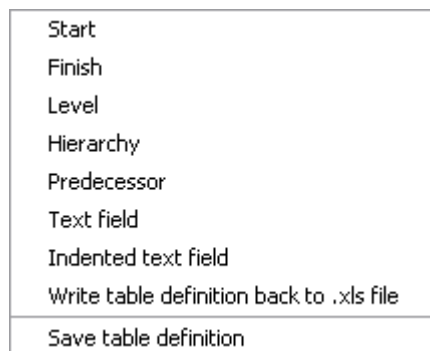
Click on one of the four radio buttons on top of the window to choose which data shall be displayed. On the left hand side of the window you have the opportunity to select a project definition (unless the radio button “network plan” was checked). On the right hand side of the window you can choose a single network plan (only if the radio button “network plan” is checked). Then press “Open”.

### 2.2.2.6 Afinion Project-Viewer with .xls (Excel)

**Please note:** The .xlsx format of Excel 2007 is not a .xls format. If you are using Excel 2007 you have to save the table as Excel 2000-2003!

The Excel table should contain the column names in the first row.

When you open the table, it will normally be shown without bars. You then have to assign the required headers to the columns. To do this right-click in the header and select the corresponding value:



**Start:** Defines the start of the bar

**Finish:** Defines the end of the bar

**Level and/or Hierarchy:** Defines the work breakdown structure. You can use either a level information, e.g. 1, 2, 3, etc or a proper work breakdown structure, e.g. 1, 1.1, 1.1.1, 1.1.2, 1.2 etc. When you use the hierarchy, the numbers themselves are irrelevant, the dot separator is important!



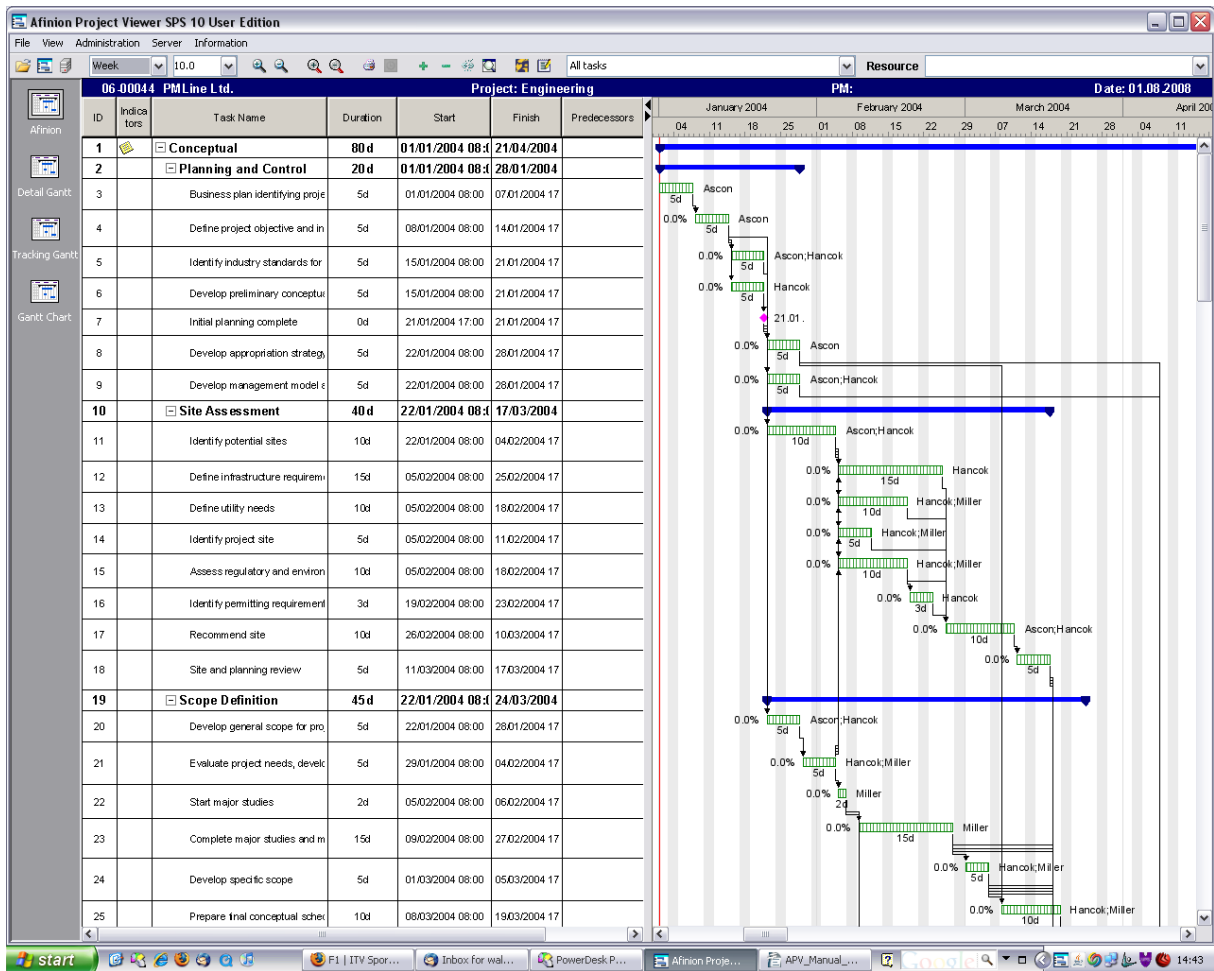
**Predecessor:** Defines the links between tasks . Multiple links have to be separated by semicolon. This function is restricted to Finish-Start relations.

**Text field:** Defines the corresponding column as text and only shows the field in the table part of the view.

**Indented text field:** Uses the Level or Hierarchy field (whichever has been assigned last) to structure the display of the text and show the bars as summary or normal bars.

## 2.3 Operation

### 2.3.1 General



The APV shows the activities of the project on the left hand side and a bar chart (Gantt) on the right hand side. Vertical red lines indicate the start and the end of the project. Actual project, resource (in case you have chosen one) and actual date are displayed in the title bar.

In the task bar on the left you can choose different Gantt Charts and Views used by the project manager in Microsoft Project. The view "My View" is a standard view in which the user has the possibility to create and save an individual view (see page below).

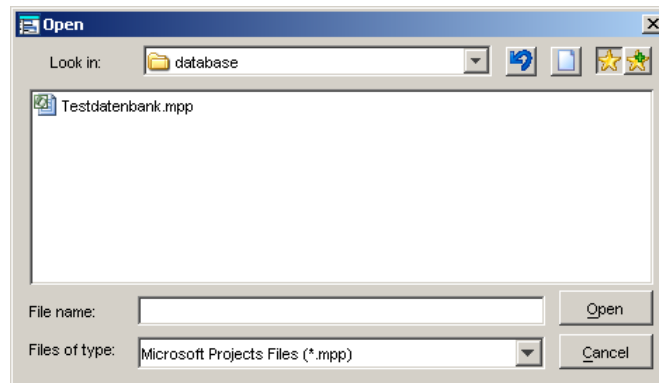


The menu bar contains five menus:



### 2.3.1.1 File

Click on „Open“ to directly open an existing .mpp, mpd, mdb, xls or xlm file. An explorer window to choose your file will be opened.



The subsidiary menu “Connection Manager” opens the Connection Manager. Use the Connection Manager as described above.

The subsidiary menu „Load Project“ opens a window displaying the actual connection to a database. In that window you can choose a different project from the actual database.

“Open with SPS” is only available, if you have licensed the Smart Project Server.

“Export tasks to Outlook” exports the tasks for the selected resource to Outlook. See Chapter 5 for details.

*Note: This menu is only visible in “Expert Menu” mode (see Administration below).*

Click „Exit“ to close APV.

Click “Close Fully” to terminate the resident application as shown by the icon in the system tray as well.

### 2.3.1.2 View

Here you you can enlarge or reduce the time scale.

Additionally you have the alternative to enlarge or to reduce the display.

By clicking on the „Expand Node” or the “Collapse Node“, you can choose between partial display and full display of the activities.

“Enable / Disable Links” displays the connections in the bar chart.

“Fit in Window” scales the view, so that the whole project is displayed in the bar chart.

“Date Format” lets you select different date formats as well as selecting your own.

*Note: This menu is only visible in “Expert Menu” mode (see Administration below).*

“Language” allows you to select the programme language.



### 2.3.1.3 Administration

At first you need to select “Open Configuration” and then enter the administrator password. This will activate the full menu. When you close the Afinion Project-Viewer completely (Menu “Close fully”) and restart it, the full menu will be hidden again.

**Note:** When there is no password set, the full menu is always visible.

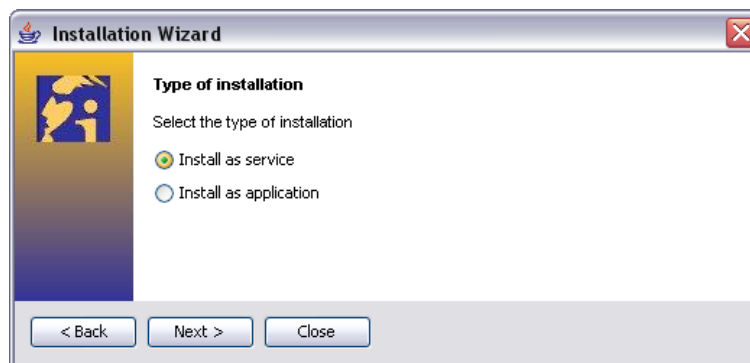
“Menu Mode” provides two sub-menus:

- “Normal Menu” hides the menus “Export tasks to Outlook” (File) and “Date Format” (View).
- “Expert Menu” shows these two menus.

“Change password” allows you to set or change the password used for administrative tasks.

**Note:** This password is only valid for the Administration menu.

“Change Installation” starts a wizard which provides a window to select the language and a window to select the start-up mode:



- When installing the Afinion Project-Viewer as a service it will be loaded into system memory at computer start up. An icon in the system tray (on the right at the bottom of the screen) will show its presence. A single click on the icon immediately opens the Viewer. If the Viewer is the default application for .mpp files, a double click on an .mpp file will open the file instantly.
- When installing the Viewer as an application it will only be loaded when either clicking on a start-up icon or by double clicking a .mpp file.

“Install AddIn” is only relevant for users of the Smart Project Server (SPS). For details see *Smart Project Server* manual, available at [http://pmlne.co.uk/Downloads/Docs/SPS\\_Manual\\_11.pdf](http://pmlne.co.uk/Downloads/Docs/SPS_Manual_11.pdf)

“Define initial screen” allows you to replace the start-up screen by your own HTML or HTM file. After a system restart your new start-up screen will be activated. This feature is especially useful to link the Project Viewer to your company intranet.

With “Select logo” you can integrate your company logo, which will then be shown on all printouts. The picture has to be GIF, JPG or PNG format. Afinion Project-Viewer does not scale the picture, a size of approx. 60 x 60 pixels is recommended.

With “Manage menus” the administrator can define in detail, which menus are available for the user.

### 2.3.1.4 Server

**Important:** The “Server” menu can only be used in conjunction with project databases!



The "Server" menu initially only contains one sub-menu: "Open configuration". When you select this menu, you are asked to enter the server password.

Note: This password is independent of the password in the "Administration" menu. The password **Apv1!** is preassigned.

When you open the "Server" menu again, you will now have the following entries:

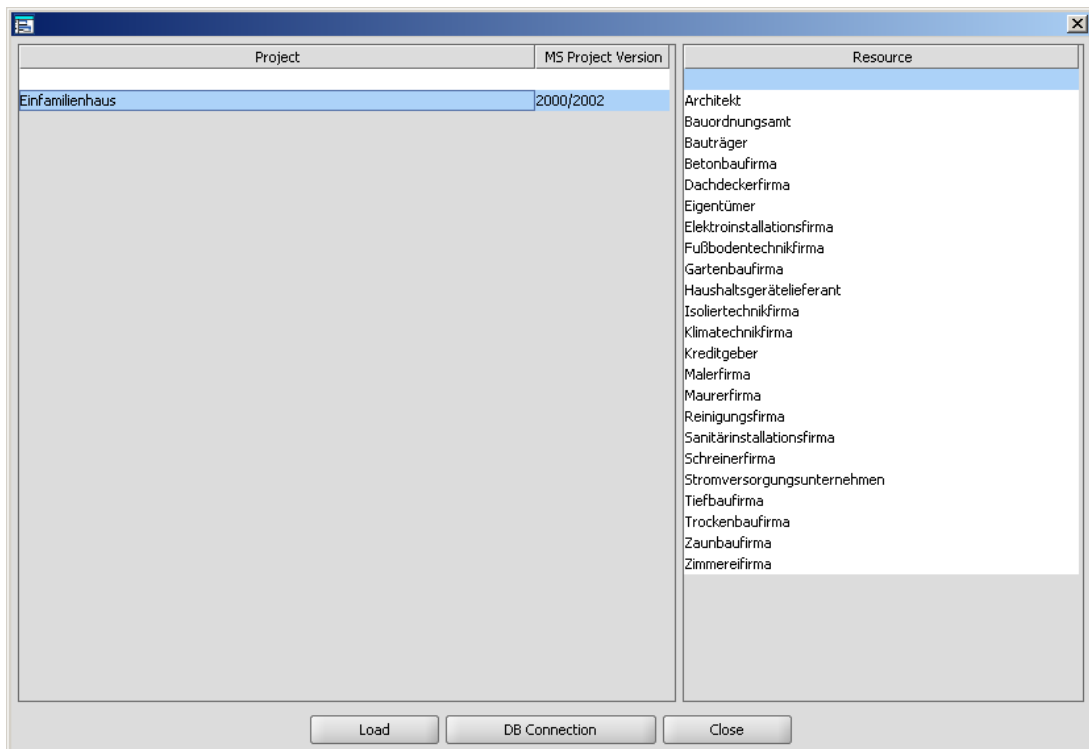
- "Time Reporting". See chapter 3 for details.
- "Change Time Reporting Password".
- Menus relating to Smart Project Server set-up (only for users of the Smart Project Server). For details see *Smart Project Server* manual, available at [http://pmlne.co.uk/Downloads/Docs/SPS\\_Manual\\_1.1.pdf](http://pmlne.co.uk/Downloads/Docs/SPS_Manual_1.1.pdf)

### 2.3.1.5 Information

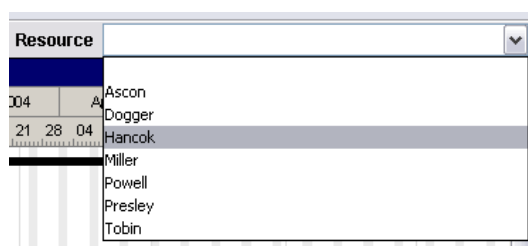
Contact and license information.

### 2.3.2 Resource Controlled Display

When starting Afinion Project-Viewer you have the possibility to display a dedicated or assigned resource only. Available resources are shown in a the list on the right. If there are several projects in the database, all activities of one resource in all projects may be viewed.



In addition, there is the possibility to choose the resources in a loaded plan:

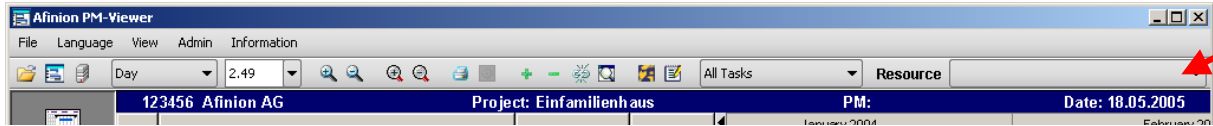




After doing so, the displayed information is refreshed, and all the activities of the chosen resource are shown.

E.g. in the case of vacation replacement the display can be set to show the activities of a colleague (resource) and the assignment being viewed can be exported to Outlook. More on this will be explained later.

### 2.3.3 The Toolbar of Afinion Project-Viewer



The icons have the following functionality:



Opens the explorer window to select and open an .mpp file



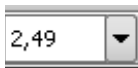
Opens the window with your actual database connection to choose a different project



Opens the Connection Manager



Sets the time scale in the bar chart



Sets the unit width in the bar chart



Magnifying button to enlarge the time scale



Magnifying button to reduce the time scale



Magnifying button to enlarge the table display



Magnifying button to reduce the table display



Print. Page preview and setup (see chapter Error: Reference source not found)



Exports assignment and appointments to outlook



Expands tree



Collapses tree



Shows connections in the bar chart



Hides connections in the bar chart



Fits the bar chart in order to display the entire project



Displays contact information



License agreement

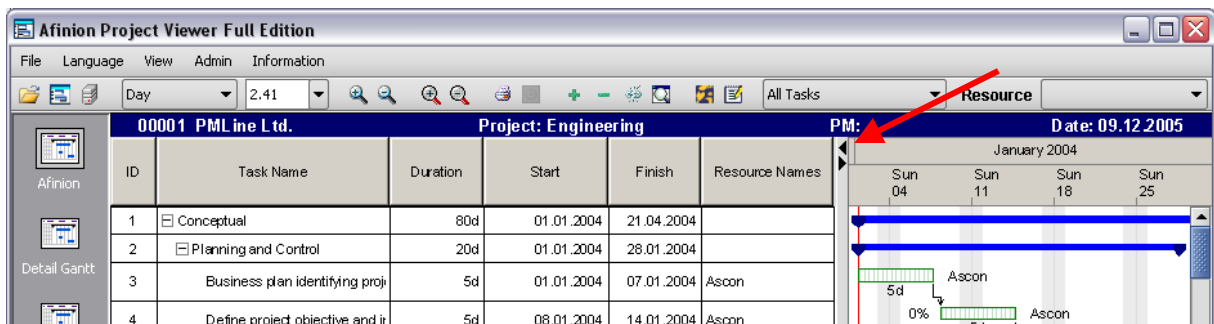
All icons are displayed with tool tips, which will provide additional information when the mouse is moved over the selected icon.

### 2.3.4 Change / Adjust the Table View

If you press the left mouse button in the head area of the columns, you can move the selected column. This allows you to order the columns according to your requirements and priorities. In order to increase or decrease the width of the rows, click on the border of the row-header and move it to the right or the left while keeping the mouse button pressed, exactly as it is done in Excel.

00001 PMLine Ltd.		Project: Engineering			
ID	Task Name	Duration	Start	Finish	Resc
1	<input type="checkbox"/> Conceptual	80d	01.01.2004	21.04.2004	
2	<input type="checkbox"/> Planning and Control	20d	01.01.2004	28.01.2004	
3	Business plan identifying proj	5d	01.01.2004	07.01.2004	Ascon
4	Define project objective and it	5d	08.01.2004	14.01.2004	Ascon

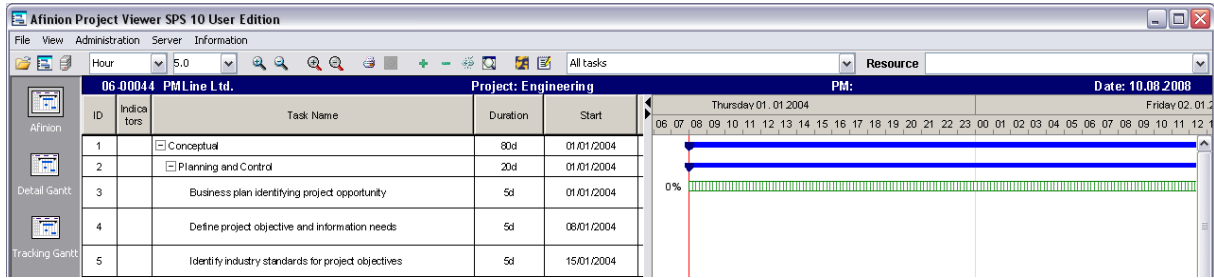
### 2.3.5 Enlarge / Reduce the Bar Chart (Gantt)



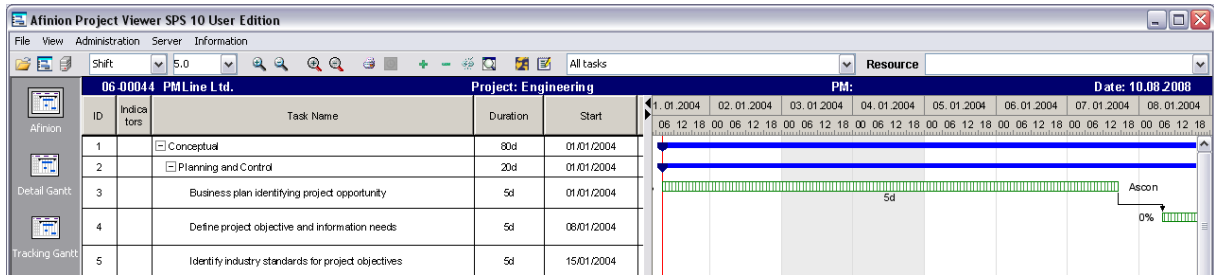
If you want to enlarge or reduce the bar chart press one of the black arrows on top of the bar between bar chart and table pointing left or right. Alternatively you can move the bar by clicking on it and dragging it with the left mouse button pressed.

### 2.3.6 Setting of Magnifying Button

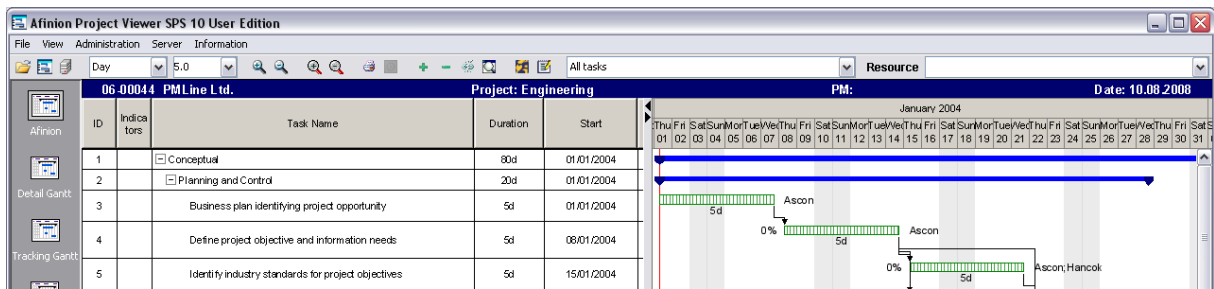
In the largest time scale "Hour" 1 day with 1 hour intervals will be displayed:



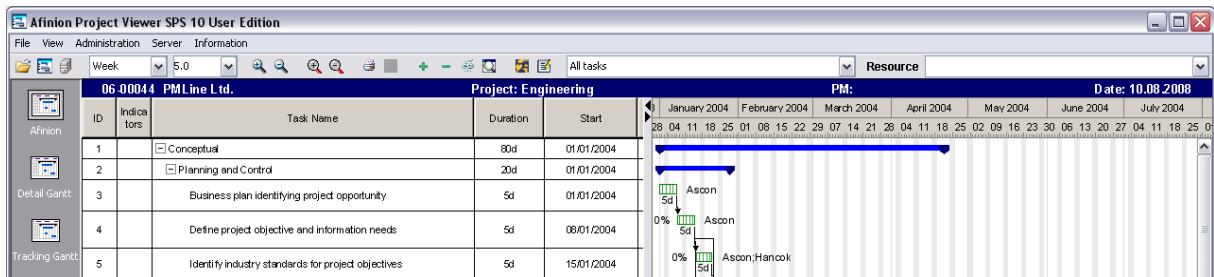
The "Shift" display will show you more days with an interval of 6 hours:



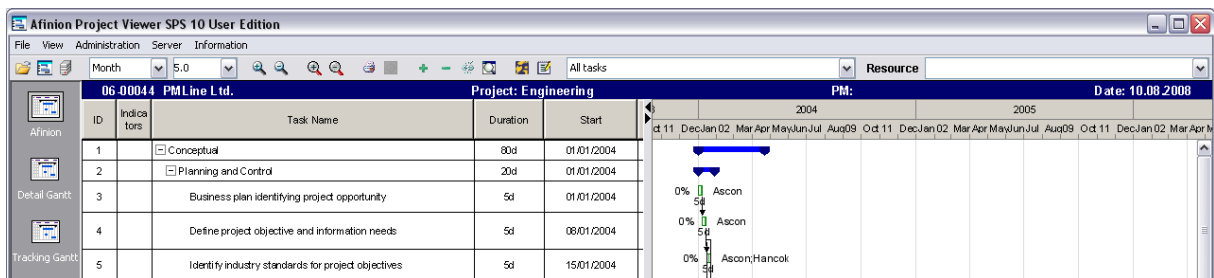
The "Day" setting displays entire days:



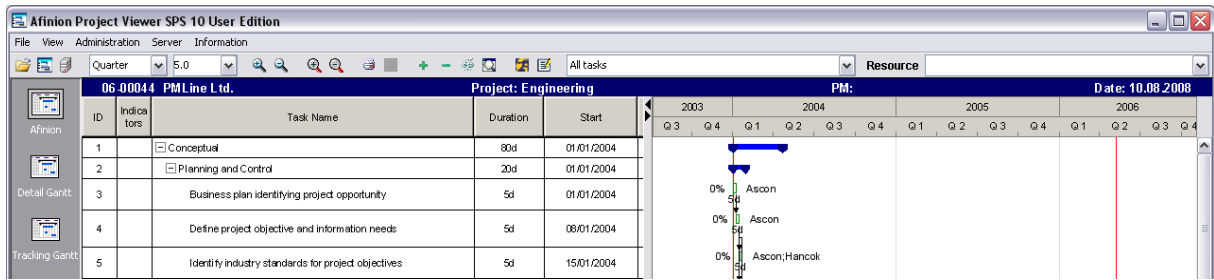
With the next click months and weeks will be displayed:



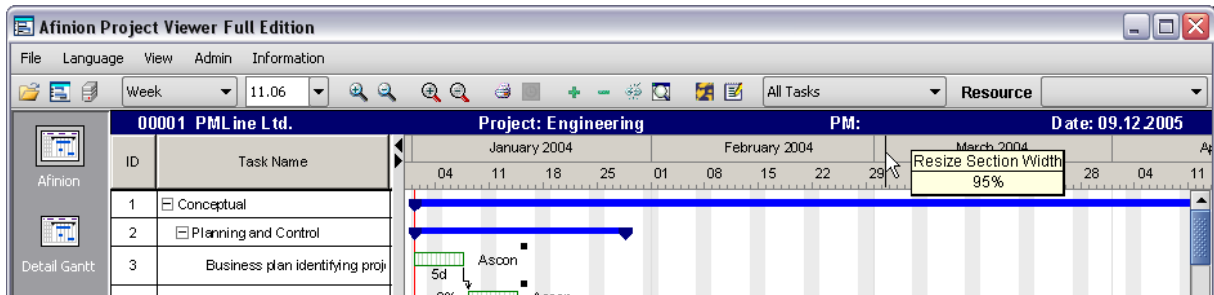
The following setting shows months.



The smallest time scale displays the quarters.



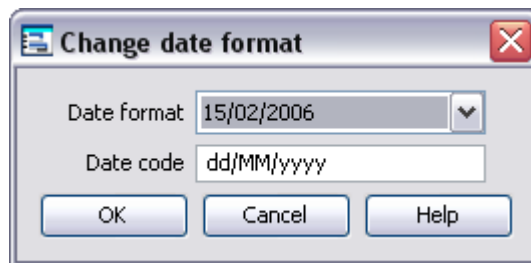
### 2.3.7 Modifying Section Width



In addition to the selection of the time scale, you have the possibility to change the section width within a chosen scale. To do so, click at any point in the time scale, and with the pressed mouse button change the width of section as desired. When you drag the mouse towards the left, you decrease the section width and increase it by dragging the mouse to the right.

### 2.3.8 Setting the Date Format

Select „View > Date format“:



Either select a format from the „Date format“ pull-down list or enter your own format in the „Date code“ field.



## 3 Time Recording

### 3.1 General

To utilise Time Recording only makes sense, if it covers the entire team and all its activities. As Time Recording 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 Recording 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 Recording is the entry of the Windows user account in the corresponding field in Microsoft Project. For additional information see Chapter 3.3 below.

Time Recording 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 Recording 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 Recording 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.

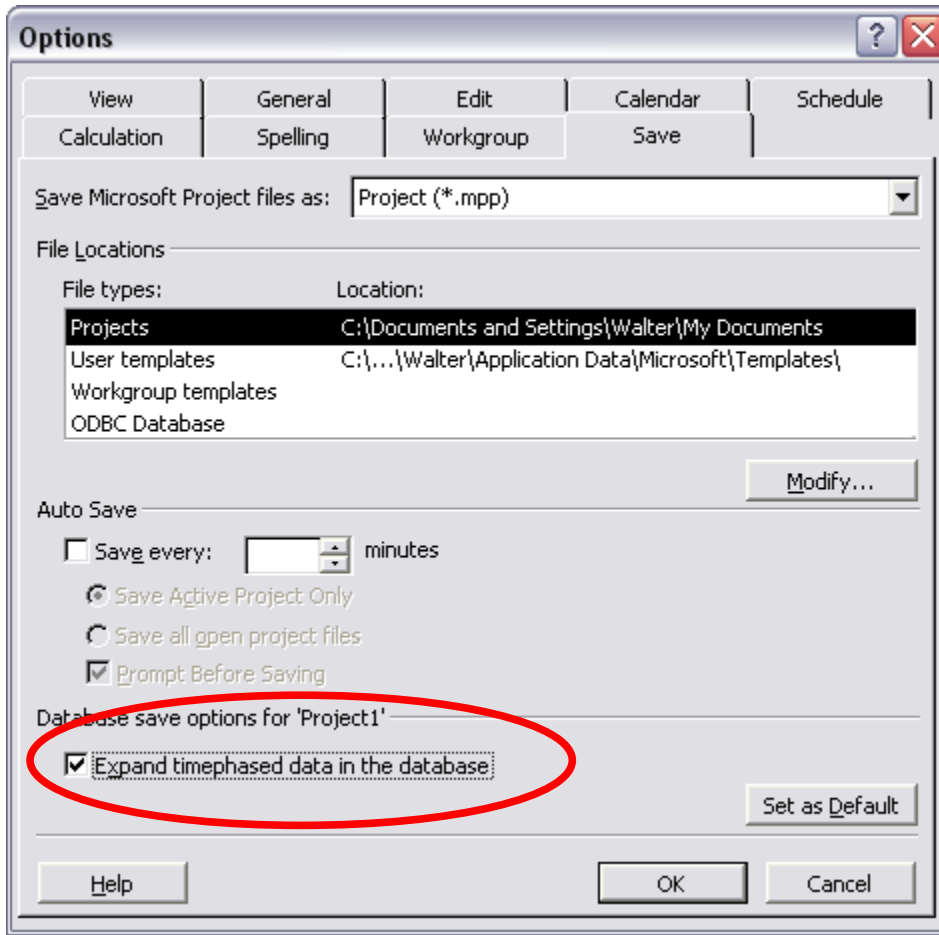
### 3.2 First Steps

#### 3.2.1 Basic Decisions

Once you have decided to introduce Time Recording 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.

#### 3.2.2 Expand Time Phased 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 Recording data.



### 3.2.3 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.

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".

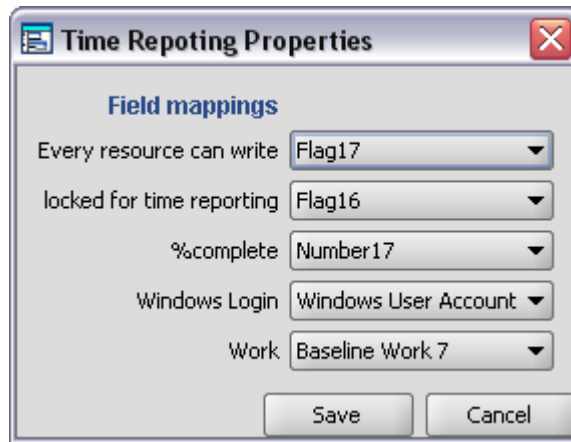
		Resource Name	Windows User Account	Type	Mat
1		Engineer		Work	
2		Domain Tester	Domain\Login	Work	
3		Workgroup Tester	PC-Name\Login	Work	

### 3.2.4 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 Recording in the Afinion Project-Viewer is completely independent of Microsoft settings. You cannot modify any Web Access data. Make sure however that the fields you want to use for Time Recording have not been pre-assigned by the project manager. Normally these fields will be free. If not, assign different fields as described below.



- 1 Open Afinion Project-Viewer
- 2 Go to menu *Admin > Time Recording*
- 3 Enter the password (default password is "Apv1!" without quotation marks)
- 4 Select the fields to be used for Time Recording 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.<br>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 Recording   |
| 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 Recording, 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 Recording. 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

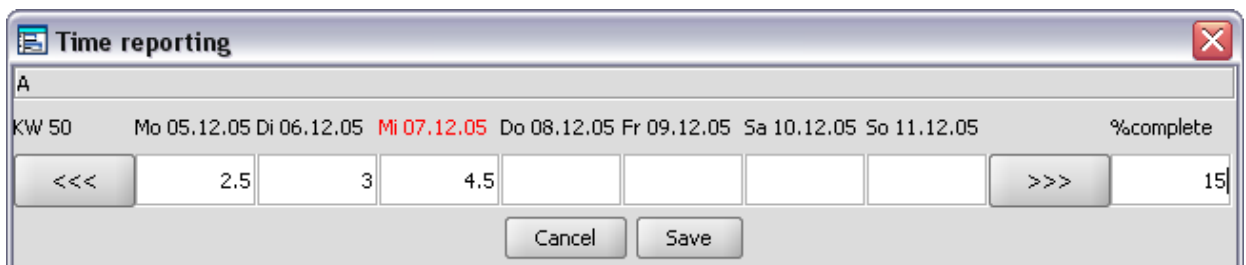
**Important:** The Baseline Work fields are used by Microsoft Project to store baselines. We therefore do not recommend using Baseline Work 1 – 5.

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

### 3.3 Using Time Recording

Remember: Only MS Access and MSSQL Server project databases may be used for Time Recording.

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



opens:

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.

### 3.3.1 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:

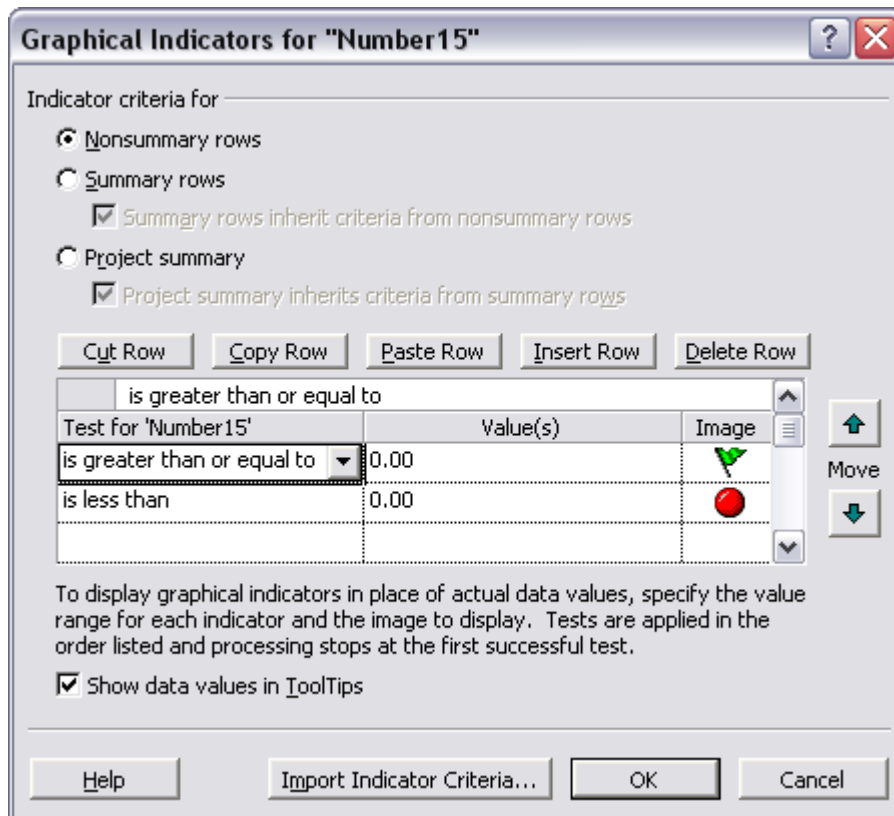
Actual Work Hours (Text16)

Formula: [Number16] & " h"

Critical Work (Number15)

Formula: [Work]-[Number16]

Graphical Indicators:



% Work Progress (Text17)

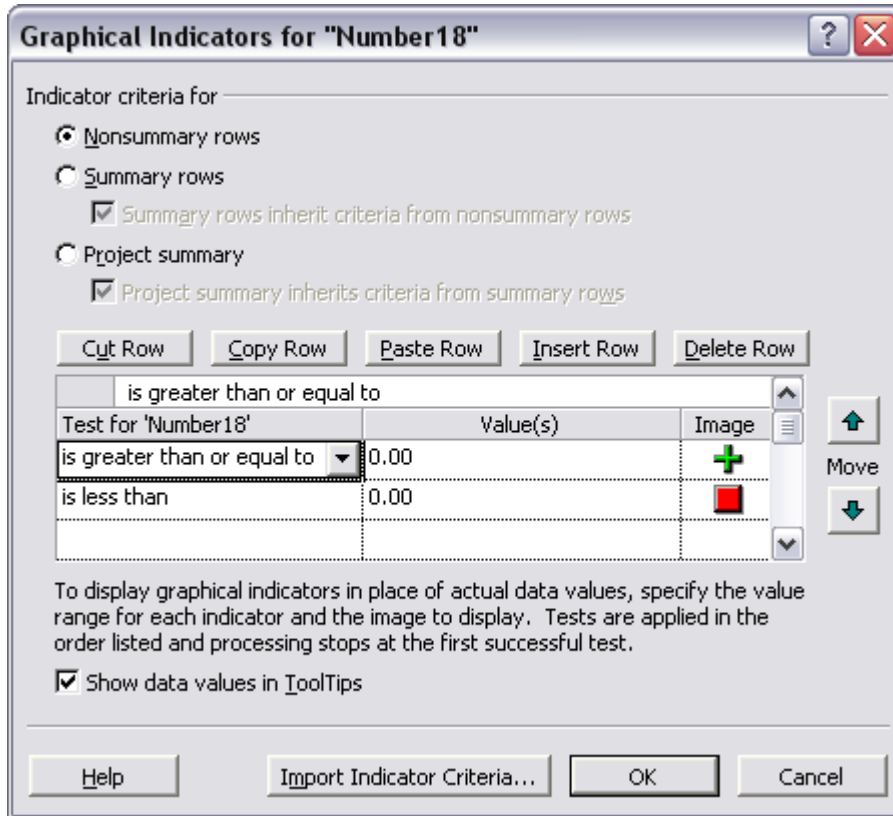
Formula: [Number17] & "%"

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 Recording”, 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.

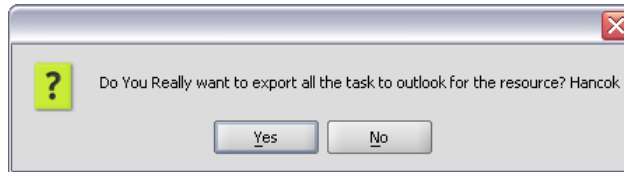


## 4 Afinion Project-Viewer and Outlook

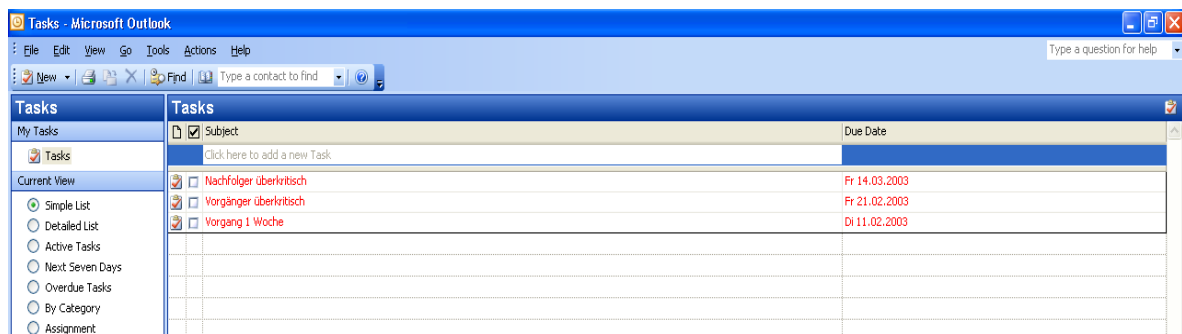
### 4.1 Exporting Activities to Outlook

With Afinion Project-Viewer you have a possibility to export your activities from a project plan to the folder “Calendar” in Outlook. The corresponding button  is only activated if, while loading a plan, a resource selection has been made. The resource names in Microsoft Project will usually be different from those in Outlook.

After you have pressed the Outlook button, a security warning appears.

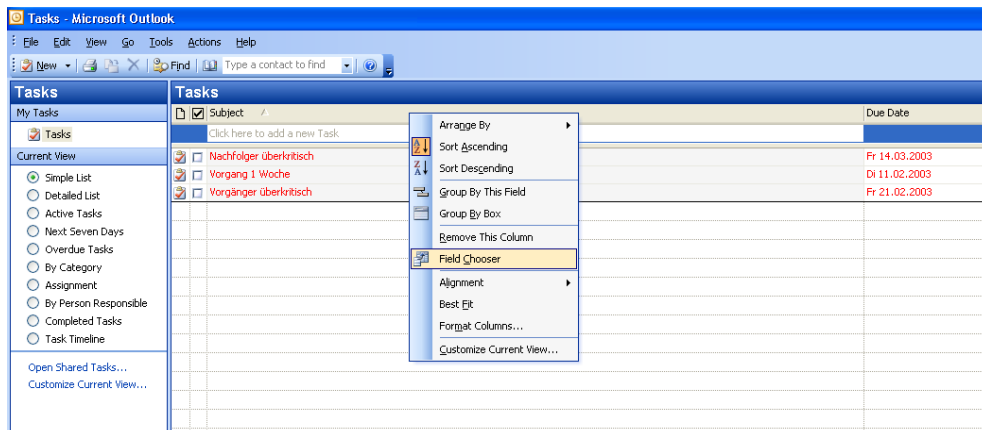


After confirming your actions, your activities are exported to the Outlook tasks in the personal folder, regardless of corresponding Outlook user and selected resource name.



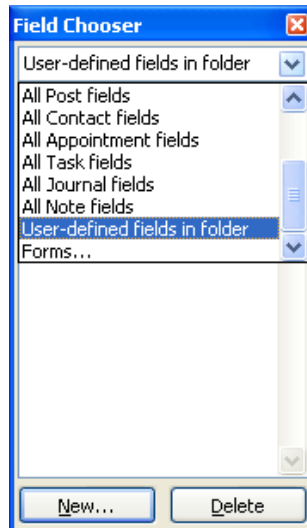
### 4.2 Customising Outlook

In order to show more information from a project plan, the standard display of Outlook must be changed accordingly.

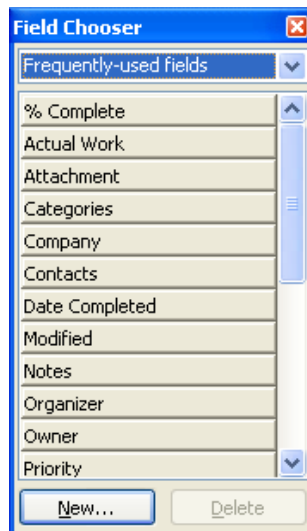


We do it in following way:

Click with the right mouse button on the header bar and select “Field Chooser”.



Here you select "User defined fields in folder". Choose Project and UID. In that field, press and hold the left mouse button, and drag the field into the header bar of Outlook.



In the next step select "Frequently-used fields"

There you have the choice between many different fields (for example % complete, notes etc.). Please proceed in the way explained above.

At the end of this procedure, you will see the display similar to that shown below.

The way you order your fields is up to you.



Project	UniqueId	% Co...	Total ...	Subject	Start Date	Due Date
Testdaten f...	23	0%	3 days	Nachfolger überkritisch	Di 25.02.2003	Sa 15.03.2003
Testdaten f...	21	0%	3 days	Vorgänger überkritisch	Mo 03.02.2003	Fr 21.02.2003
Testdaten f...	4	0%	1 day	Vorgang 1 Woche	Di 04.02.2003	Di 11.02.2003

Once you have entered the degree of completion of your work, respectively execution appended, the fields aren't renewed. For example as shown below, with new Start and new End of activities (while rescheduling a project), the degree of completion won't be overwritten. This assures that, although changes are made, the original entries aren't overwritten.

Project	UniqueId	% Co...	Total ...	Subject	Start Date	Due Date
Testdaten f...	23	0%	3 days	Nachfolger überkritisch	Di 25.02.2003	Sa 15.03.2003
Testdaten f...	21	0%	3 days	Vorgänger überkritisch	Mo 03.02.2003	Fr 21.02.2003
Testdaten f...	4	0%	1 day	Vorgang 1 Woche	Di 04.02.2003	Di 11.02.2003



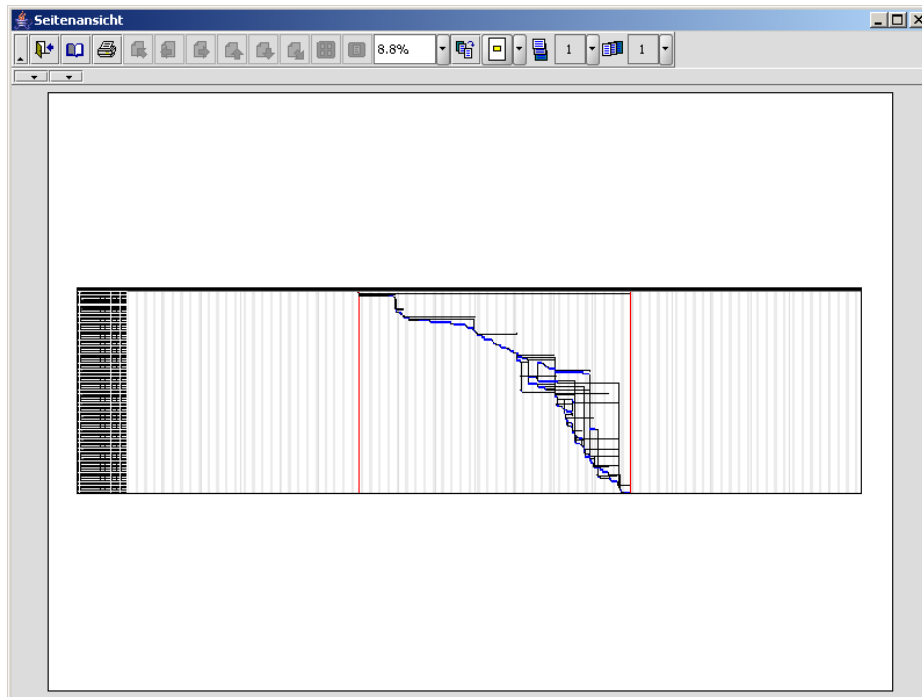
The screenshot shows the Microsoft Outlook 'Tasks' window. The window title is 'Tasks - Microsoft Outlook'. The menu bar includes 'File', 'Edit', 'View', 'Go', 'Tools', 'Actions', and 'Help'. The toolbar contains 'New', 'Print', 'Close', 'Find', and a search box labeled 'Type a contact to find'. The main area is divided into two panes. The left pane, titled 'My Tasks', shows a 'Tasks' folder and a 'Current View' section with several radio button options: 'Simple List' (selected), 'Detailed List', 'Active Tasks', 'Next Seven Days', 'Overdue Tasks', 'By Category', 'Assignment', 'By Person Responsible', 'Completed Tasks', and 'Task Timeline'. Below these are links for 'Open Shared Tasks...' and 'Customize Current View...'. The right pane, titled 'Tasks', displays a table of tasks. The table has columns for 'Project', 'UniqueId', '% Co...', 'Total ...', 'Subject', 'Start Date', and 'Due Date'. The first row is a header with a 'Click here to ...' link. The second row is a task entry with a red background: 'Testdaten f...' (UniqueId: 23, % Complete: 0%, Total: 3 days, Subject: 'Nachfolger überkritisch', Start Date: 'Fr 28.02.2003', Due Date: 'Di 18.03.2003'). The third row is another task entry: 'Testdaten f...' (UniqueId: 21, % Complete: 0%, Total: 3 days, Subject: 'Vorgänger überkritisch', Start Date: 'Mo 03.02.2003', Due Date: 'Fr 21.02.2003'). The fourth row is a task entry: 'Testdaten f...' (UniqueId: 4, % Complete: 0%, Total: 1 day, Subject: 'Vorgang 1 Woche', Start Date: 'Di 04.02.2003', Due Date: 'Di 11.02.2003').

Project	UniqueId	% Co...	Total ...	Subject	Start Date	Due Date
Click here to ...						
Testdaten f...	23	0%	3 days	Nachfolger überkritisch	Fr 28.02.2003	Di 18.03.2003
Testdaten f...	21	0%	3 days	Vorgänger überkritisch	Mo 03.02.2003	Fr 21.02.2003
Testdaten f...	4	0%	1 day	Vorgang 1 Woche	Di 04.02.2003	Di 11.02.2003

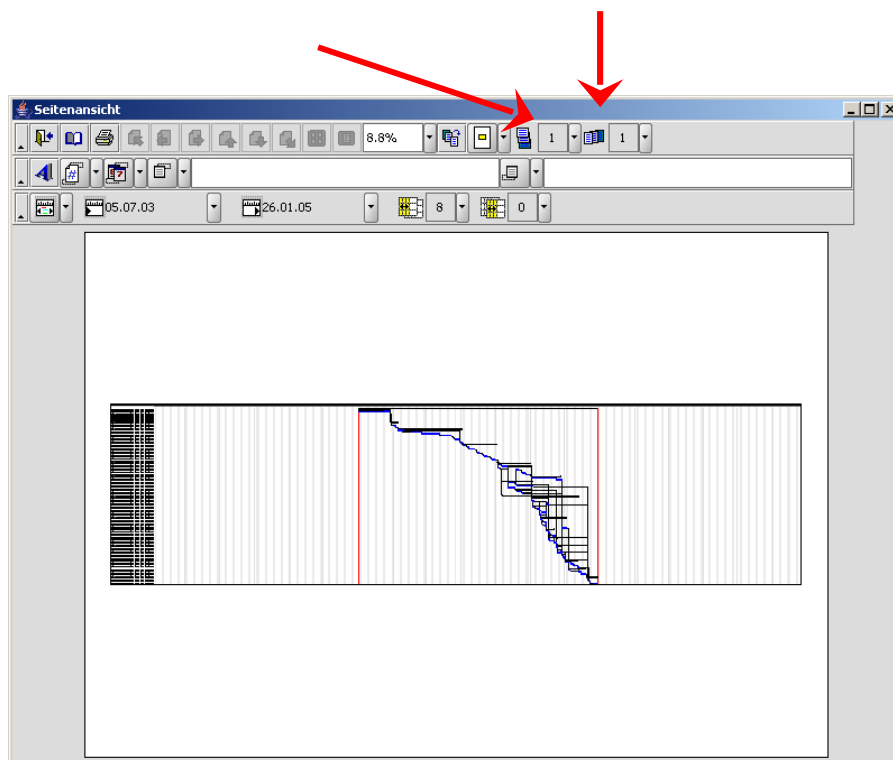
Please note that when an assignment is closed and deleted, then it will be generated again during the next transfer of activities from the project plan, because there is no information sent back from Outlook to the project plan. It is advisable to insert the field "% complete" to control your assignments and appointments.



## 5 Printing with the Afinion Project-Viewer



Click on the Printer icon in the menu bar to open a new window where you get possibilities to display the project in various sizes. By default the entire project is displayed on one page and there the view of the bar chart is minimized to a minimum percentage.



In the drop down menus the size of the bar chart can be altered.














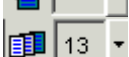








The enlargement percentage can be increased to show the project on several pages. This helps to better display the details on one page. You can then print all the



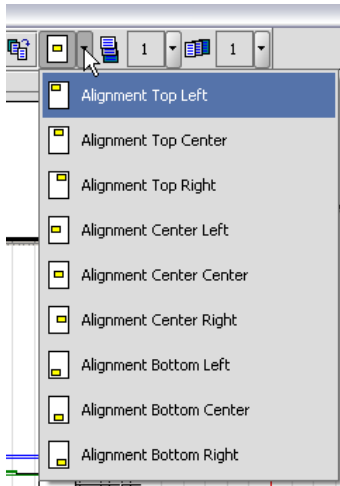
pages or the selected pages as required. As soon as the display of the Afinion Project-Viewer is increased and it requires more than one page, the button in the drop down menu is activated. With a click on this button ("display one page") all other buttons are activated, so that you can easily move from one page to another.

## The Buttons of the Print Menu

This menu provides many buttons in order to optimise printing.

	Close preview
	Page setup
	Print
	Go to first page
	Show previous page
	Show next page
	Show page above
	Show page below
	Go to last page
	Display diagram with all pages
	Display diagram on one page
	Show all the diagrams on one page
	Position of the diagram on the page
	Number of pages (up)
	Number of pages (wide)
	Font type
	Page numbering
	Print date
	Header setup
	Footer setup
	Print chosen area
	Choosing rows to print

As a standard setting, the diagram is aligned in the centre of the page, but you can change this property as required and the diagram can be viewed at other positions in the page. To do so, there are many options available in the drop-down menu shown below.





## 6 User Specific Information

### 6.1 Windows (Roaming User, Terminal Server, Citrix)

By default all user specific information is saved in the user profile.

Possibilities:

- Several users can work with their individual settings on one computer
- Install APV on a Server to allow several users to work with APV with their individual settings.
- Roaming User
- Terminal Server, Citrix Meta Frame Server

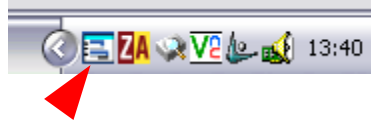
### 6.2 Linux, Mac OS X, Solaris, and other Unix-Versions

Characteristical for Unix Versions is a \$home directory for every user. Modifiable files have to be placed in the directory \$home/.ProjectViewer.



## 7 Application Termination

When you shut the Afinion Project-Viewer down, the system tray entry will still be activated. Click this icon to re-open the application instantly.



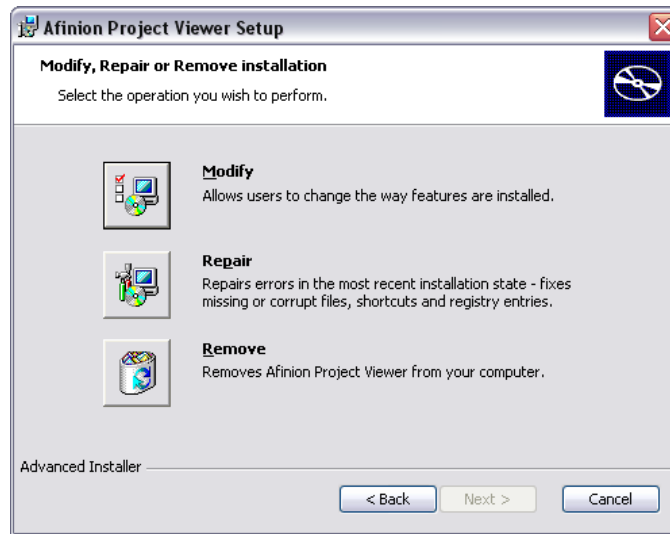
Right-click the icon and then click *Close fully* or select *Menu File > Close fully* to completely terminate the application .

*Note:* If you start Afinion Project-Viewer via a shortcut while the task list icon is still visible, you will open a second instance of the application instead.



## 8 Deinstallation of Afinion Project-Viewer

In order to remove Afinion Project-Viewer from your pc restart the set-up *Project-Viewer.exe* and select "Remove" to deinstall the application:



Alternatively start *Control Panel* → *Add or Remove Programs*, select *Afinion Project-Viewer* and click *Remove*.



## Developer & Distributor

Switzerland

Afinion AG  
Giessenstrasse 13  
CH-5322 Koblenz

Tel: +41 56 267 40 50  
eMail: [info@afinion.ch](mailto:info@afinion.ch)

Germany

Afinion AG  
P.O. Box 1349  
D-79743 Waldshut-Tiengen

Tel: +49 7754 929 262  
eMail: [info@afinion.de](mailto:info@afinion.de)

## Partners

Germany

INTERMET-PROJECTS  
Kreuzstrasse 5  
D-82383 Hohenpeissenberg

Tel: +49 8805 921 987  
eMail: [info@internet.de](mailto:info@internet.de)

Luxembourg

IT-House Luxembourg  
5, rue de l'Eglise  
L-1458 Luxembourg

Tel: +352 266 41 810  
eMail: [info@it-house.lu](mailto:info@it-house.lu)

United Kingdom

PMLine Ltd  
3 Burghfield Bridge Close  
Burghfield  
Reading RG30 3XL

Tel: +44 118 950 5799  
eMail: [info@pmline.co.uk](mailto:info@pmline.co.uk)