

## How To Use Projxs Schedules MS Project Upload

### Overview.

You can upload schedules created in MS Project and track them on Projxs. This helps team members:

- work from a common, up-to-date schedule
- process completions from anywhere there is internet access worldwide
- route approvals for any task prior to allowing completion
- instantly generate email alerts and notifications
- automatically release tasks and approvals with Smart Release
- view real time project status information from the project dashboard
- stop the project pending completion of key tasks

Resource	Project User
Analyst	<input type="checkbox"/> Systems Analyst
Deployment Team	<input type="checkbox"/> Deployment Team
Developer	<input type="checkbox"/> Dee Developer
Management	<input type="checkbox"/> Facilities Manager
Project Manager	<input type="checkbox"/> Project Manager
Technical Communicators	<input type="checkbox"/> Tech Communicator
Testers	<input type="checkbox"/> Tess Tester
Trainers	<input type="checkbox"/> Terry Trainer

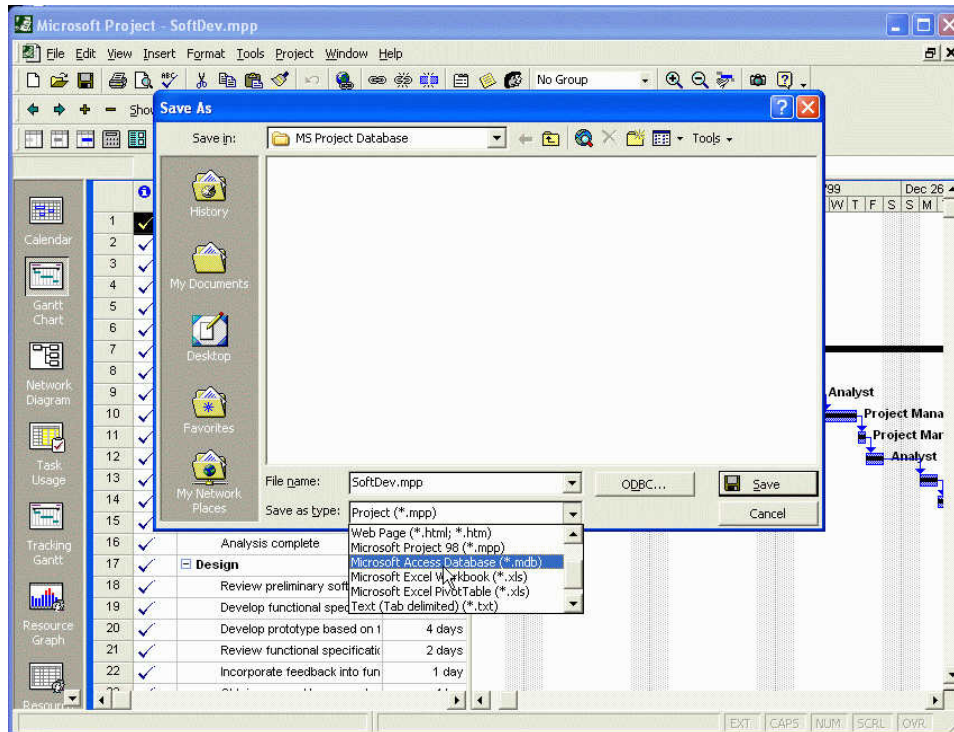
### Smart Release

Smart Release, the powerful technology that automatically releases tasks, groups of tasks and approvals at the right time, controls all schedules. The responsible party is then notified that the task or approval is awaiting their action. Smart Release works on the principle that tasks and approvals are either released simultaneously with their predecessor or released sequentially after all predecessors are complete. A task cannot be completed or an approval processed until it is released. This simple concept provides exceptional project control, basically stopping the project until the tasks and approvals you deem critical are completed in order.

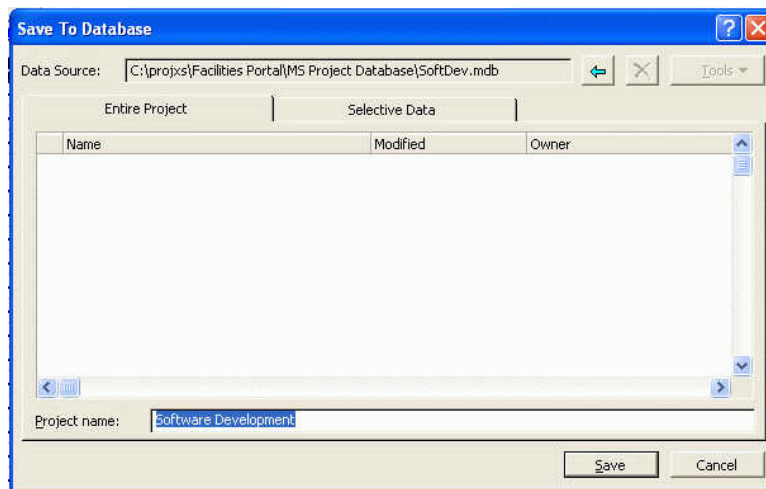
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## Preliminary Steps

Save the MS Project to an Access database. Projxs gathers the information needed to build its schedule from an Access database exported from MS Project.



Select "Save As" from the "File" pull down menu in your MS Project window. Then select type "Microsoft Access Database (\*.mdb)" from the "Save as Type" pull down list and hit the "Save" button. During the upload you can rename your project by changing the "Project Name" value. Make sure you save the entire project.



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Upload the MS Project Access database to a Projxs File Folder. You can upload the MS Project Access database to any Projxs File Folder. Select the File Folder name you want to use, and the file list page for that folder will be displayed.



Click on "New Files" in the right top corner of the file list page.



The "New Files" dialog page will appear. Follow the normal procedures to add a new file to the folder and upload the MS Project Access database. If you need to review these steps, open "New Files Help" at [http://www.projxs.com/help/files\\_new.pdf](http://www.projxs.com/help/files_new.pdf).

### Uploading the MS Project Tasks to a Projxs Schedule

Select any Projxs Assignments page. Assignments pages, like all Projxs pages, may be titled differently. The page shown here is called "Assignments", however, the "Punch List" page that follows is also a Projxs Assignments page and could be used for the MS Project schedule tasks to be uploaded.

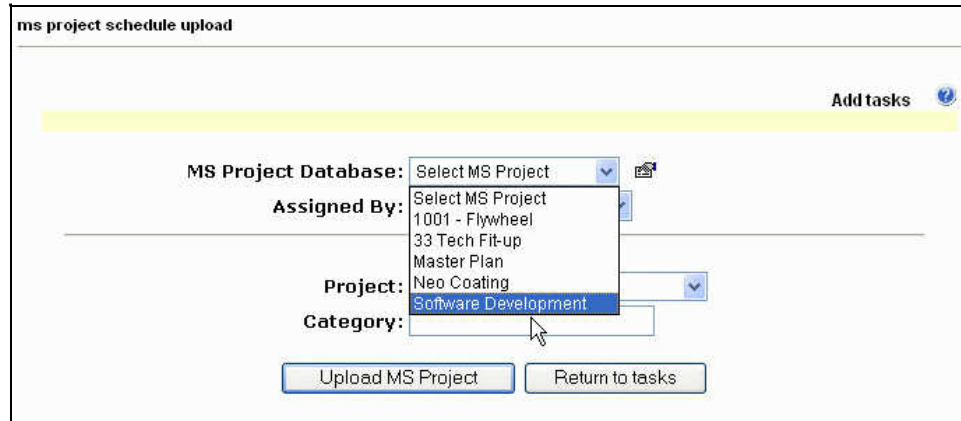


Select the MS Project function. The "MS Project Schedule Upload" page will appear.



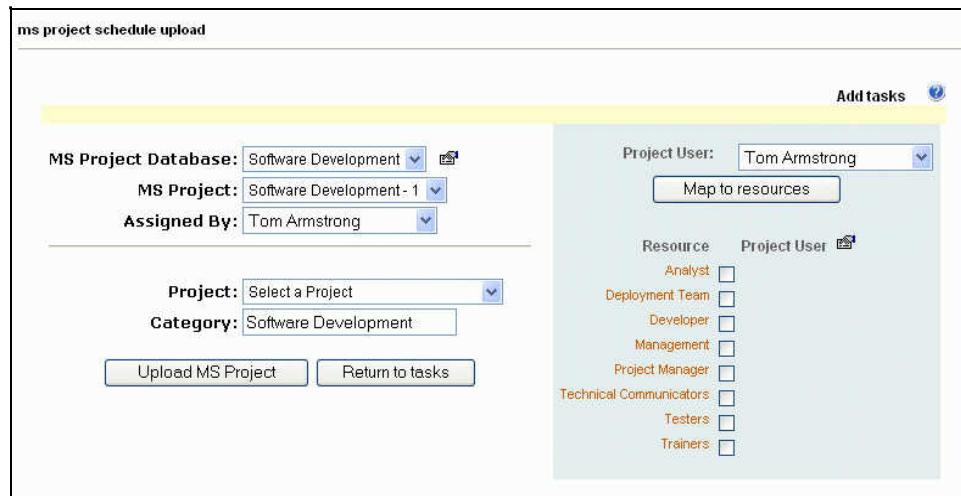
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Select the MS Project database. The pull down list will show all Access databases that you have permission to view. Select the database that contains the MS Project with the tasks you want to upload.



The screenshot shows the 'ms project schedule upload' form. At the top right is an 'Add tasks' button with a refresh icon. Below it is a yellow horizontal bar. The form contains several fields: 'MS Project Database:' with a dropdown menu showing 'Select MS Project'; 'Assigned By:' with a dropdown menu showing 'Select MS Project'; 'Project:' with a dropdown menu showing 'Neo Coating' and 'Software Development' (highlighted); and 'Category:' with a dropdown menu. At the bottom are two buttons: 'Upload MS Project' and 'Return to tasks'.

Once the database has been selected, the page automatically refreshes with some fields populated using MS Project and Projxs values.



The screenshot shows the 'ms project schedule upload' form after selection. The 'MS Project Database:' dropdown is now 'Software Development'. The 'MS Project:' dropdown is 'Software Development - 1'. The 'Assigned By:' dropdown is 'Tom Armstrong'. The 'Project:' dropdown is 'Select a Project'. The 'Category:' dropdown is 'Software Development'. The 'Project User:' dropdown is 'Tom Armstrong' with a 'Map to resources' button below it. On the right, there is a table of resources with checkboxes:

Resource	Project User
Analyst	<input type="checkbox"/>
Deployment Team	<input type="checkbox"/>
Developer	<input type="checkbox"/>
Management	<input type="checkbox"/>
Project Manager	<input type="checkbox"/>
Technical Communicators	<input type="checkbox"/>
Testers	<input type="checkbox"/>
Trainers	<input type="checkbox"/>

At the bottom are two buttons: 'Upload MS Project' and 'Return to tasks'.

Select the MS Project. The MS Project database may contain several projects. The first project is automatically selected. Use the pull down list to select a different one.



The screenshot shows a close-up of the 'MS Project:' dropdown menu. The dropdown is open, showing three options: 'San German FESM Project - 1', 'San German FESM Project - 1', and 'San German FESM Project - 2' (highlighted). The 'Project:' dropdown below it is 'Select a Project'.

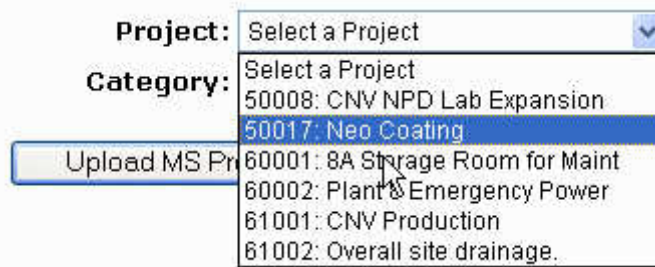
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Select the default Assigned By user. The "Assigned By" defaults to you. It can be changed to any current Projxs user. The user identified here becomes the assigner of all high level tasks. The assigner of other tasks is the assignee of the parent task.



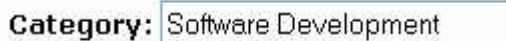
The image shows a form with two fields: "MS Project:" and "Assigned By:". The "Assigned By:" field has a dropdown menu open, displaying a list of users: Terry Trainer, Tess Tester, Tim Morgan (highlighted), Tom Armstrong, Tom Bobel, and Ven Contractor. To the right of the dropdown is a small box containing the number "2" and a downward arrow.

Select a Projxs Project. The "Project" field defaults to the current project. You can select a different "Project" from the pull down list. The project list is limited to active projects where you are a member. Selecting a Project allows only team members to view the schedule. Otherwise, any Project User with view permission for the page can access the schedule.



The image shows a form with two dropdown menus: "Project:" and "Category:". The "Project:" dropdown is currently set to "Select a Project". The "Category:" dropdown is open, showing a list of project categories: "Select a Project", "50008: CNV NPD Lab Expansion", "50017: Neo Coating" (highlighted), "60001: 8A Storage Room for Maint", "60002: Plant & Emergency Power", "61001: CNV Production", and "61002: Overall site drainage.". To the left of the "Category:" dropdown is a button labeled "Upload MS Proj".

Enter a Category. The "Category" defaults to the MS Project database name. You can change it to any unique Project/Category combination on the current Projxs Assignments page.



The image shows a form with a text input field labeled "Category:". The field contains the text "Software Development".

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Mapping MS Project Resources to Project Users. A list of MS Project Resources is displayed. Next to each "Resource" are a check box and then either the name of a "Project User" or a blank. The "Resource" is colored red, if it has not been mapped.

Project User: Tom Armstrong

Map to resources

Resource	Project User
Analyst	<input type="checkbox"/>
Deployment Team	<input type="checkbox"/>
Developer	<input type="checkbox"/>
Management	<input type="checkbox"/>
Project Manager	<input type="checkbox"/>
Technical Communicators	<input type="checkbox"/>
Testers	<input type="checkbox"/>
Trainers	<input type="checkbox"/>

Select a Project User to map. From the pull down list select a "Project User" to map to MS Project resources.

Project User:

Map to

- Steve Du Barry
- Systems Analyst
- Tab Roy
- Tech Communicator
- Terry Trainer
- Tess Tester
- Tim Morgan

Select the associated Resources. From the list of "Resources", check the boxes for each one whose tasks will be assigned to the selected Project User. MS Project tasks not assigned to a resource will be assigned to the Assigner in Projxs.

Project User: Systems Analyst

Map to resources

Resource	Project User
Analyst	<input checked="" type="checkbox"/>
Deployment Team	<input type="checkbox"/>
Developer	<input type="checkbox"/>

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**Click the "Map to resources" button.** The "Project User" will be mapped to all checked "Resources" and the page will be refreshed showing the current status of your mapping. All resources must be mapped before the "Upload MS Project" action will be accepted.



Resource	Project User
Analyst	<input type="checkbox"/> Systems Analyst
Deployment Team	<input type="checkbox"/>
Developer	<input type="checkbox"/>

Initiate the upload. Click on the "Upload MS project" button to upload the MS Project schedule into Projxs. Each task will be:

- assigned to a Projxs User
- classified as a sequential or simultaneous task
- released for completion according to Smart Release

Multiple resources assigned to an MS Project task will be added as approvers of that task in Projxs. Due dates will be retained. Tasks will be deemed sequential if all preceding siblings have an earlier due date and all succeeding siblings have a later due date. Otherwise, they will be deemed simultaneously released tasks.



### Adding New Tasks

To add tasks to a schedule, click on the Add Tasks link, and the Add Tasks page will open. If you wish to combine tasks that you add with those that you upload from MS Project, do the upload first, then add additional tasks. MS Project tasks form a new schedule upon upload.



# How To Use Projxs Schedules MS Project Upload

## Getting Help

Whenever you see the Help question mark, a separate Help page covering the content for the current page is available. Click on the icon to open the Help file in a PDF viewer.



There are also notes available on the MS Project Upload page for quick help with Uploading the MS Project Database and with Mapping MS Project Resources to Project Users.

A screenshot of a form section. It contains two rows. The first row is labeled "MS Project Database:" and has a dropdown menu with "Select MS Project" and a blue arrow icon. To the right of the dropdown is a small icon of a document with a question mark and the word "Notes". The second row is labeled "Assigned By:" and has a dropdown menu with "Tom Armstrong" and a blue arrow icon. A mouse cursor is pointing at the "Notes" icon.A screenshot of a form section. It contains two rows. The first row has two columns: "Resource" and "Project User". To the right of "Project User" is a small icon of a document with a question mark and the word "Notes". The second row has two columns: "Analyst" and "Systems Analyst". There is a small square checkbox between "Analyst" and "Systems Analyst". A mouse cursor is pointing at the "Notes" icon.

Click the Notes Icon, and a short help message will be displayed.



## More Help

If you would like additional information, please contact us at:

Email: [support@projxs.com](mailto:support@projxs.com)

Phone: 888-324-7931 (toll free in the United States)  
203-364-8701