

Lehnert Computer Services

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Ask the Teacher – Article for May, 2006

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Topic: Importing Projects into Project Server

Question: I am in the process in installing Project Server. There is some existing in progress projects that I would like to bring into the Project Server environment. Can I do this?

Answer: This can be accomplished as long as you comply with the standards and values that have been established within your Project Server installation. Below I have listed some of the areas I believe will be important to consider.

1. **The Environment:** When a stand alone project schedule is imported into Project Server it will be subject to all the codes, standards, and values of an Enterprise Project. It is best to make as many changes before importing as possible to lessen any impact to the project schedule and the Project Server environment.
2. **The source of the project schedule:** Was the project schedule created as a MS Project 2003 file. If it was created on a lower level of the software, the project schedule should be opened and saved as a MS Project 2003 file first. Earlier levels of the software will not have everything required for Project Server.
3. **Resources:** The resources in the existing project should be changed to use the Enterprise Resource pool resources in Project Server. This might mean performing the Build Team function to substitute the resources. If you have local resources, how are you creating the accounts in security? Do your local resources need an account to enter tracking data? What about generic resources? Are there resources that will need to be added to the resource pool? The "Import projects to Enterprise" function will walk you through this process but check to see if you have all the resources you will need first.
4. **Custom Fields:** If the project schedule has some custom fields that use the same fields as Enterprise values, these will need to be changed and mapped to the Enterprise fields. Again, the "Import projects to Enterprise" function will walk you through this process.
5. **Enterprise codes:** Project level codes will need to be entered. These are the codes that are entered during the save process when a project schedule is created. If any custom task fields exist in the Project Server, these will need to be updated.
6. **Calendars:** Be prepared for the existing project schedule dates to change when the project schedule is imported into Project Server. If you have task calendars that are not available in Project Server, you might need to discuss this with the Server Administrator and have them added to Project Server. The project calendar might be replaced based Server options. Resource calendars might be different which could affect resource availability.

7. **How resources are assigned to tasks:** If a Project Server environment is trying to achieve accurate resource allocations, the way the resources are assigned to tasks in one project schedule could affect all project schedules. This is one area that I would look into to confirm accuracy before importing the project schedule.
8. **WBS standards:** Are there any WBS standards to comply with for your Project Server installation? Does the project schedule being imported comply with these standards? Should changes be made to the project schedule?
9. **Managed time periods:** If the existing project schedule contains actual work, there could be a conflict with the actual work protected fields within Project Server. Managed time periods expect time to be entered through Project Server and is held in the actual work protected fields. When a project schedule is imported with actual work existing, the time is not be updated to these fields. In other words, the project schedule is out of sync with the Server. If you sync to protected actuals, you will end up removing the actual work in the imported project schedule. If your Project Server is not using managed time periods, this is not an issue.
10. **Custom objects:** If the project schedule being imported has changed a table (ie: added a field) the table will be different than the ones established within Project Server. To keep any of the customized objects in the project schedule, it is best to change the names of the objects that have been changed. If this is not done, there is a possibility they could be overwritten and lost.

There are 2 actual methods of importing projects. In either case, the project schedule will not be seen in Project Server until the project schedule is actually published. For either method you chose, I would suggest reading the sections in the reference manuals that refer to this topic first:

1. If you have no resources and no custom fields, you do not need to run "Import projects into Enterprise". Complete the project and task level codes and save the project schedule as an Enterprise Project.
2. If you have resources and/or custom fields, run the "Import projects to Enterprise" function. Check to see if all the resources you will need exist in the Enterprise Resource Pool – do any need to be added? Not all project managers will have permission to run this function. Check with your Project Server Administrator.