Save to SQL Server User Manual

The Save to SQL Server macro saves all data you need for reporting with your favorite in house reporting tool (including Excel) to SQL Server. This manual describes how to setup the SQL Server database, Save Project data to it and then access that data for reporting purposes.

Contents

What You Get with Save to SQL Server

You get the following files:

1. A .sql file to setup the database.
2. A Project VBA Macro in a .mpp file.
3. An ini file to hold the database's server name and database name for the Project VBA macros.
4. Excel File with a macro to add date records to the Dates Table.

This web page has the User Instructions. If you need help with customizing your database or automating more advanced reports in Excel, please Email us.

Setting up your SQL Server Database

You need the support of your IT department and a SQL Server database administrator. They will determine which server your database will go on and setup the required users etc. Tell them its for Project Reporting, that the data is a duplicate of data already in your .mpp Project files, so the data isn't critical and needs only weekly backups or less.
Database size is dependant on the number of projects, each project taking about the same space as a .mpp file. So if after doing a File, Save as to a new .mpp file, the file size is 5MB then that is the likely amount of space it will take in the database.

Any version of SQL Server will do, even the free SQL Server Express.

For setup, the db administrator needs to:

1. First copy all files to a shared folder on your network that all users can access.
2. Create the database. Record the name of the Server used and the name given to the database. These will be needed later.
3. In the Microsoft SQL Server Management Studio, open the *Save To SQL Server Create Database.sql* file.
4. Edit the first line Use statement to refer to the database name used in 1 above.
5. Make sure you are happy with the code in the rest of the file, there should only be code to create tables, stored procedures and views. Then run it to create the database.
6. Confirm the database and its tables have been created.

Initializing your Project Data

In the Database is a Dates table that needs to hold a record per day for at least the next 10 years. The *Setup Dates.xlsm* Excel file has a macro in it that fills the table for you. This Dates table is very useful for reporting purposes.

For Project and Excel to be able to connect to the SQL Server database you have just created, first we need to setup a text .ini file that Project and Excel can use to read the database and server names. To setup this .ini file:

1. Open the *Save to SQL Server Create Database.ini* file in Windows NotePad.
2. Replace ServerName with the name of your database server from above.
3. Replace Projects with the name of the database from above.
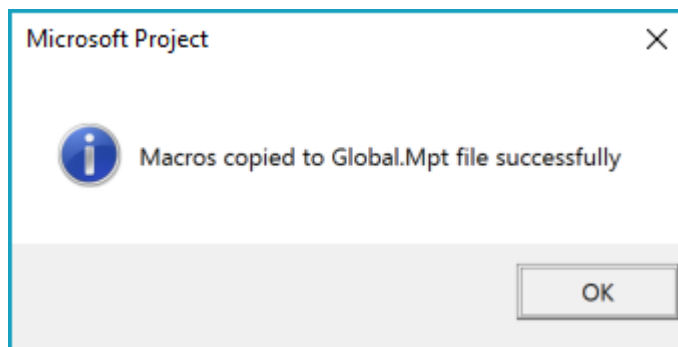4. Save the file and close NotePad.

Each user will need to locate this .ini file the first time they save to SQL Server or use the Dates Excel macro. The location is saved from then on. If you ever need to rename the database, or move it to a different Server, then simply edit the .ini file to use the new Server or database name. All users will then automatically use the new server next time they open Project or Excel. To fill the Dates Table:

Installing the Save to SQL Server macro

The macro comes in a .mpp file. Install the macro on every PC that needs to save data to SQL Server. Each PC that installs the macro needs a license.

To install the macro:

1. Open the *Save to SQL Server.mpp* file
2. Click on the Install Macro tab
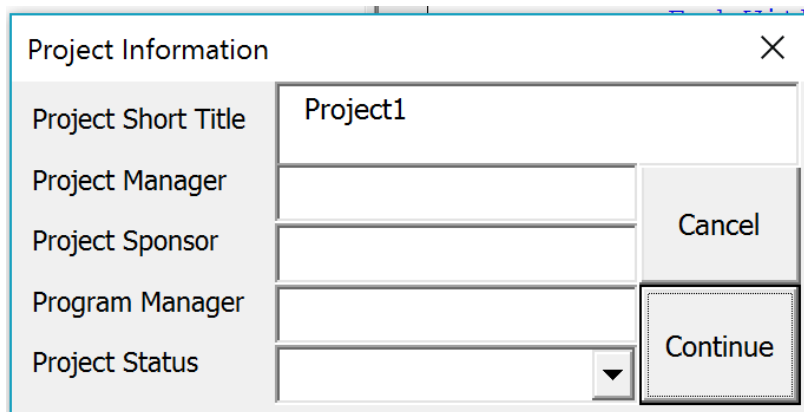3. Click on the *Install/Update Save to SQL Server* button. You should see:

4. Close the *Save to SQL Server.mpp* file and with another file open, there should be a new ProjectReporter tab on the Ribbon.

Saving your projects to SQL Server

To save your project to the database:

1. Click on the *ProjectReporter* ribbon
2. Click on the *Copy Reporting Data to SQL Server* button
3. The first time you run the macro you are asked to locate the .ini file you edited in the setup instructions above. Browse to it and select the *Save to SQL Server create database.ini*. Its path is saved in the VBA section of the Windows Registry and used automatically from now on.
4. Once the macro connects to SQL Server the following form appears:

5. Enter suitable values. This data is saved in the _Projects Table and also in the activeproject's ProjectSummaryTask.Text20 field.
Next time you run the macro the data is recovered from the activeproject's ProjectSummaryTask.Text20 field and displayed in the form for you.
If you need extra fields, ask us or save the extra data in other ProjectSummaryTask custom text fields.

WARNING: Your projects cannot be completely opened from the database, so make sure you continue to save to, and use, your .mpp files.

Reporting from SQL Server

Use whatever in house database reporting tools you have. The data is logically structured in plain text format. To use Excel to report on the data:

1. Firstly get help from your database administrator to create a View or Stored Procedure that holds all the data you need.
2. In Excel try getting external data from the Data menu or read help for the version of Excel you have.

If you need a report you can't seem to get straight from SQL Server, talk to use, we can create just about any report in Excel from Project data.

Customizing the data copied to SQL Server

The macro copies basic data but here we assume you need an extra project level custom field to hold a GL Code for the project. To add this code and see it in a SQL Server view:

1. Choose one of the Text fields for this information. All projects saved to the database should use the same one. Note the Macro uses Text20 so these instructions assume Text5.
2. Edit the design of the _Projects table in SQL Server. Add a new field called Text5. Set the Data Type to be varchar(n) where n is the maximum number of characters you need. EG varchar(30) for a maximm of 30 characters.
3. Either in the ProjectData View or a new View select the fields required, including the Text5 field.
4. For the Text5 field change the Alias column, in this case to GL Code.

Now whenever you use the View used in 3 above, your GL Code is available to report on. The macro reads all column names for each table. If the field name matches a built in field in Project (EG Text5), then the macro automatically copies the data across. After adding the new field, it won't have any data until you republish the projects by running the save macro again.

The macro does not run automatically, the macro button has to be clicked for it to run.

Not all data is copied across, so continue to save to, and use, your project .mpp files as normal. This macro just copies data to your database for reporting purposes only.