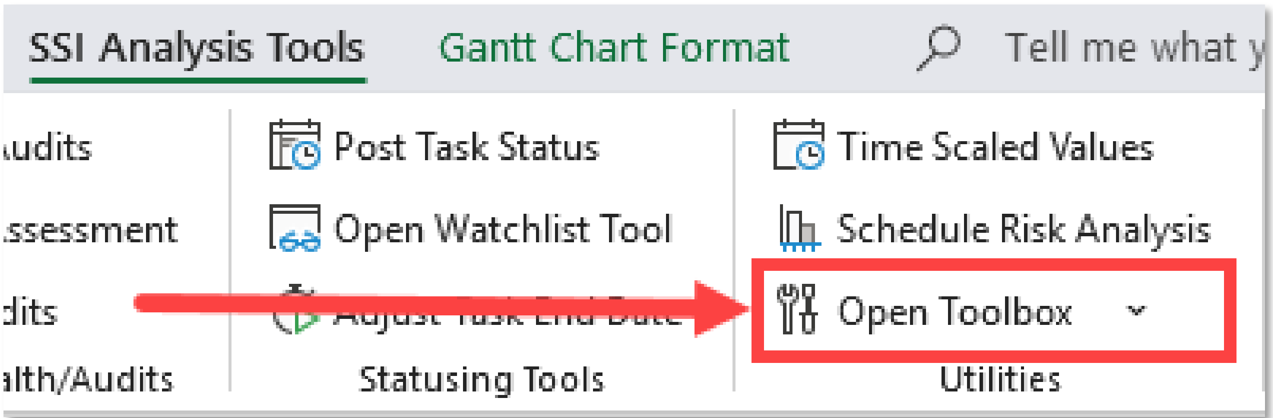
# Table of Contents

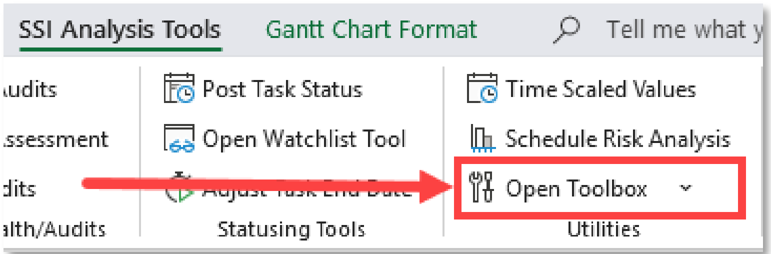
# SSI Efficiency Tools



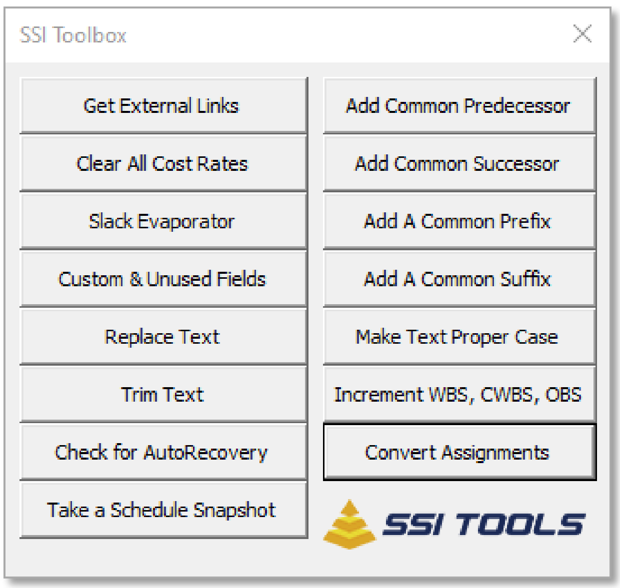

## Overview

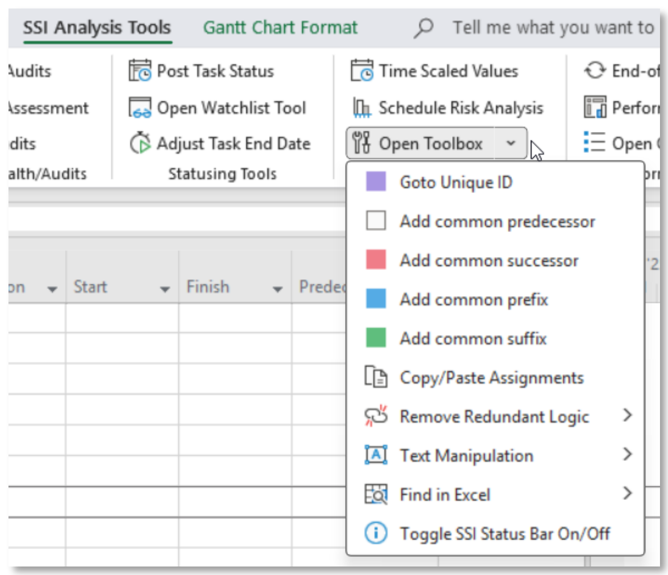
Over the course of time, SSI has created many small, quick, and easy to use tools to help project schedulers maximize efficiency in their day-to-day work in Microsoft Project Schedules. These tools are found in the **Utilities** group of the **SSI Analysis Tools** menu in Microsoft Project.

## The SSI Toolbox



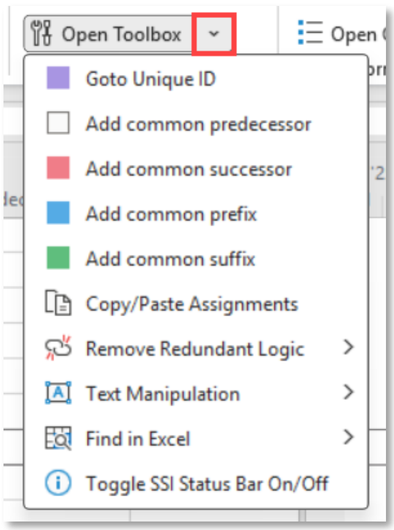

The SSI Toolbox is where most of the efficiency tools can be found. Clicking the **Open Toolbox** button will open a small form with a single button for each Toolbox tool.



## The Toolbox Quick Access Menu

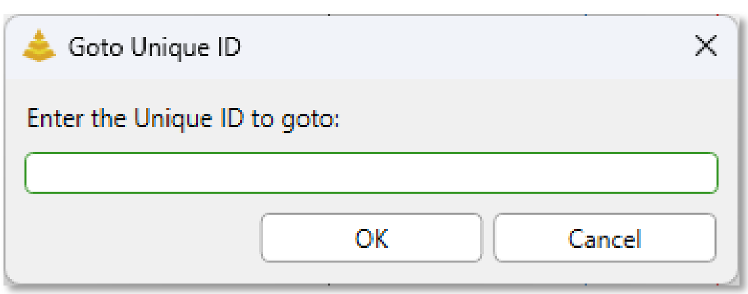
Clicking the down arrow next to the **Open Toolbox** button opens a “Quick Access” dropdown menu featuring the most frequently used Toolbox tools.




## The Goto Unique ID Tool

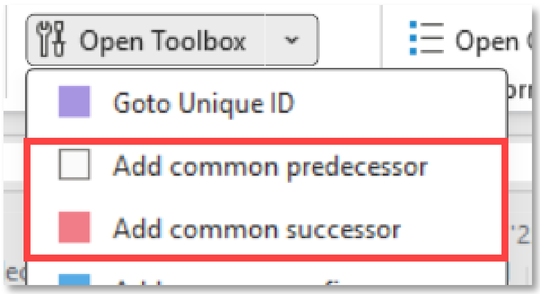

The **Go to Unique ID tool** lets you enter a unique ID and instantly selects the corresponding task in Microsoft Project.

To use this tool, click the **Go to Unique ID** button in the SSI Toolbox dropdown menu. A form will appear, allowing you to enter the Unique ID of the task you want to locate in the schedule.




Enter the Unique ID and click **OK** to instantly select the corresponding task. The form will close automatically. If no task with that ID exists in the schedule, a message box will notify you.

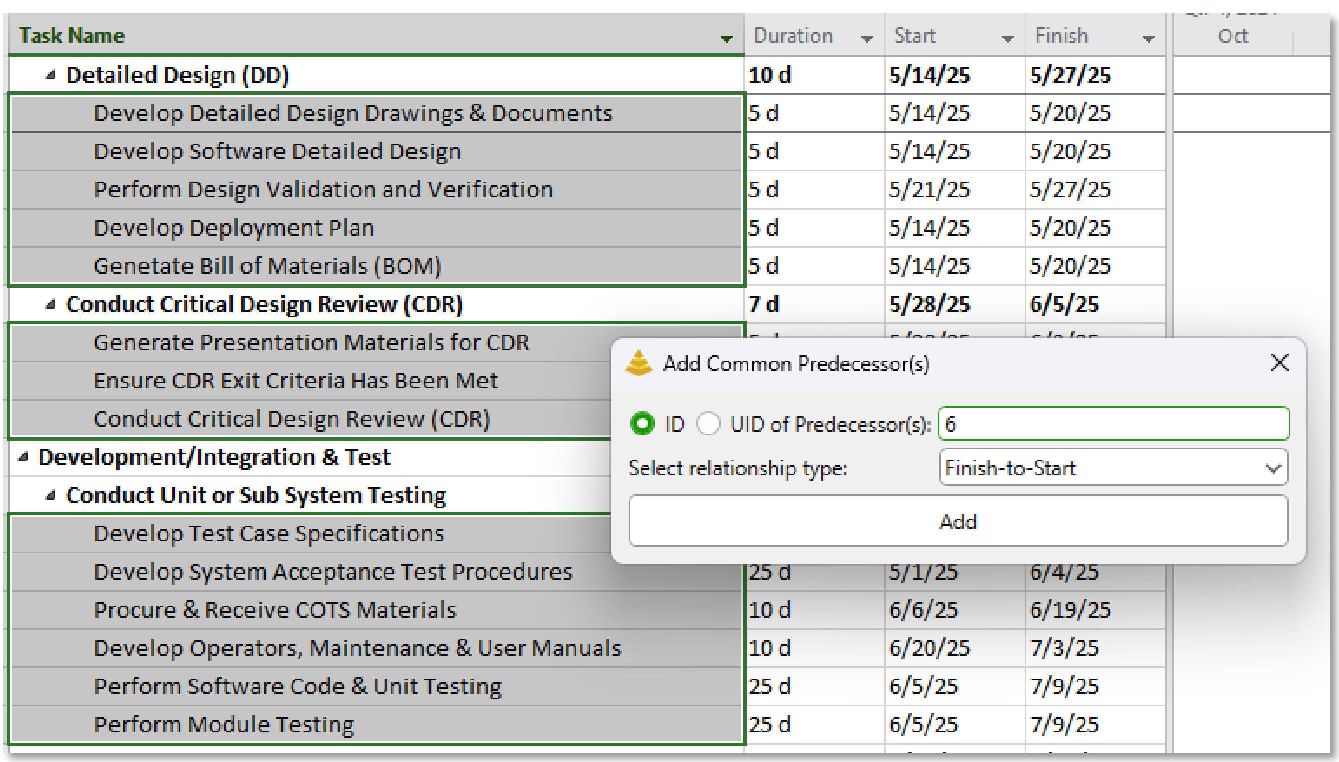
## Add Common Dependencies Tools




Adding common predecessors or successors to a group of tasks in a schedule is often necessary, but doing so manually can be cumbersome and error-prone. Copying and pasting values into the Predecessors or Successors fields in the Gantt table may inadvertently assign incorrect task dependencies within the group.

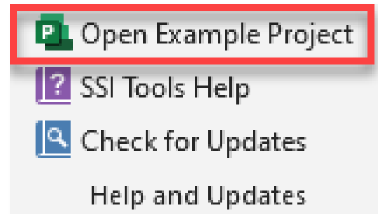
The SSI Toolbox includes tools that let you add common predecessor(s) or successor(s) to the currently selected tasks. To use them, simply click Add Common Predecessor or Add Common Successor.

On the form that opens, enter the ID or Unique ID of the task(s) that will be the common dependency, then click the **Add** button.

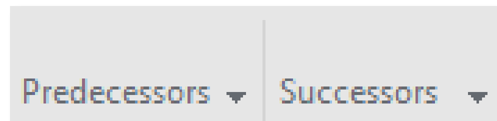


## Practice Exercise – Adding Common Dependencies

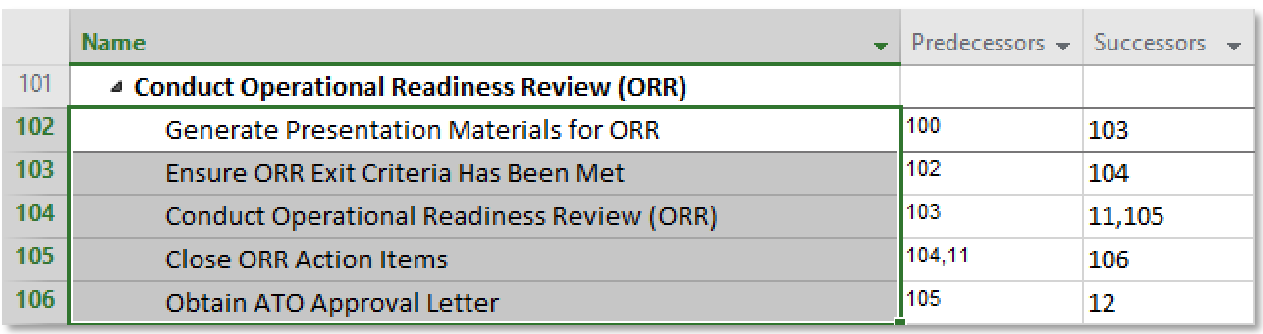
1. Open the **SSI Example Project** by clicking the **Open Example Project** button in the **SSI Analysis Tools Ribbon** in Microsoft Project.




2. In the Example Project, open the **Predecessors** and **Successors** columns in the Gantt Table.

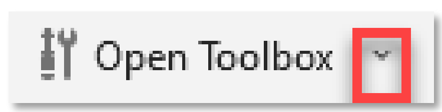



3. Select rows 102-106 in the Example Project (the last 5 tasks in the schedule).

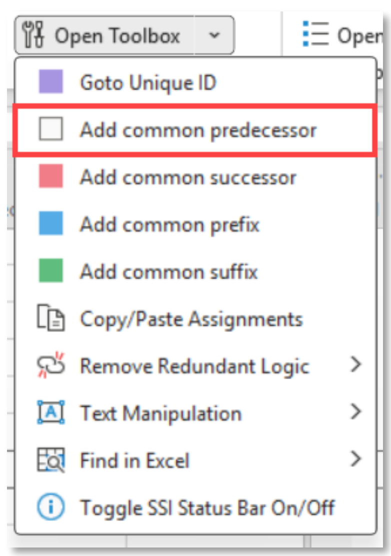


| | Name | Predecessors | Successors |
|---|---|---|---|
| 101 | Conduct Operational Readiness Review (ORR) | | |
| 102 | Generate Presentation Materials for ORR | 100 | 103 |
| 103 | Ensure ORR Exit Criteria Has Been Met | 102 | 104 |
| 104 | Conduct Operational Readiness Review (ORR) | 103 | 11,105 |
| 105 | Close ORR Action Items | 104,11 | 106 |
| 106 | Obtain ATO Approval Letter | 105 | 12 |

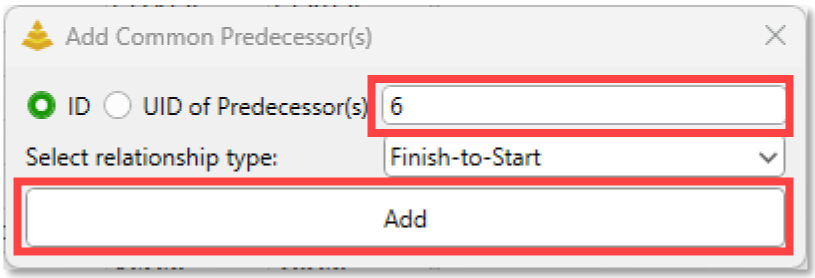
4. In the **Tools/Utilities** group of the **SSI Analysis Tools** menu, click the down carrot icon to the right of the **Open Toolbox** button.



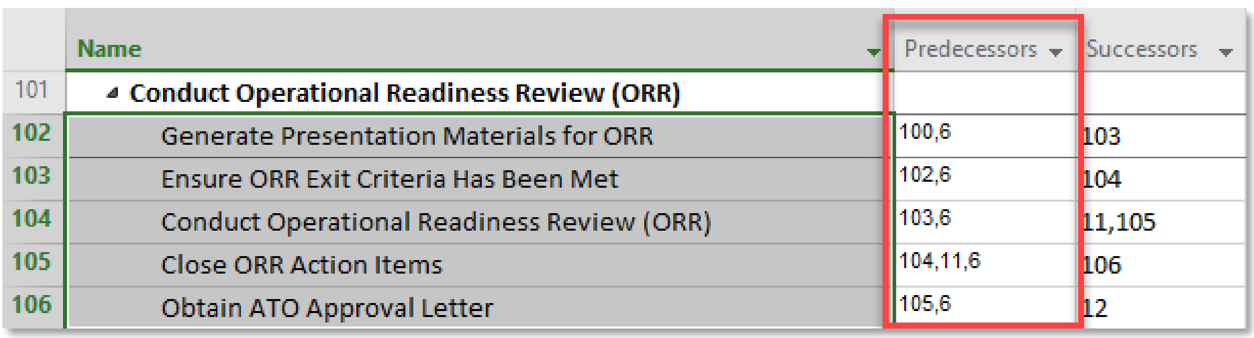

5. In the drop-down menu that opens, click **Add Common Predecessor**.



6. On the **Add Predecessors** dialog window, type ID 6 (Preliminary Design Review) in the ID of Dependency textbox, then click the **Add button.**



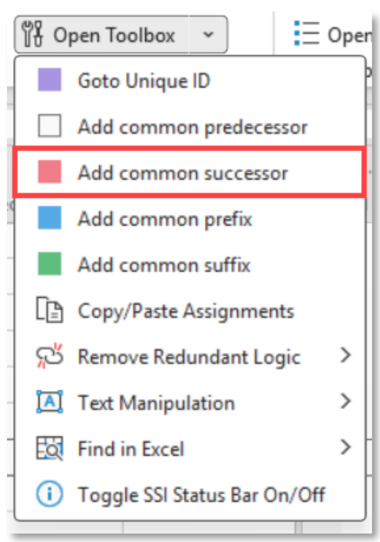

7. Inspect the Predecessors column in the Gantt table of the tasks selected. Notice that ID 6 (Preliminary Design Review) has been added to each of the tasks.



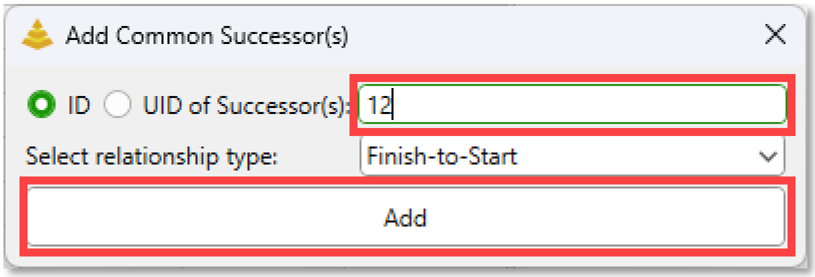
| | Name | Predecessors | Successors |
|---|---|---|---|
| 101 | Conduct Operational Readiness Review (ORR) | | |
| 102 | Generate Presentation Materials for ORR | 100,6 | 103 |
| 103 | Ensure ORR Exit Criteria Has Been Met | 102,6 | 104 |
| 104 | Conduct Operational Readiness Review (ORR) | 103,6 | 11,105 |
| 105 | Close ORR Action Items | 104,11,6 | 106 |
| 106 | Obtain ATO Approval Letter | 105,6 | 12 |

8. Keep rows 102-106 selected. In the **Tools/Utilities** group of the **SSI Analysis Tools** menu, click the down carrot icon to the right of **Open Toolbox**.

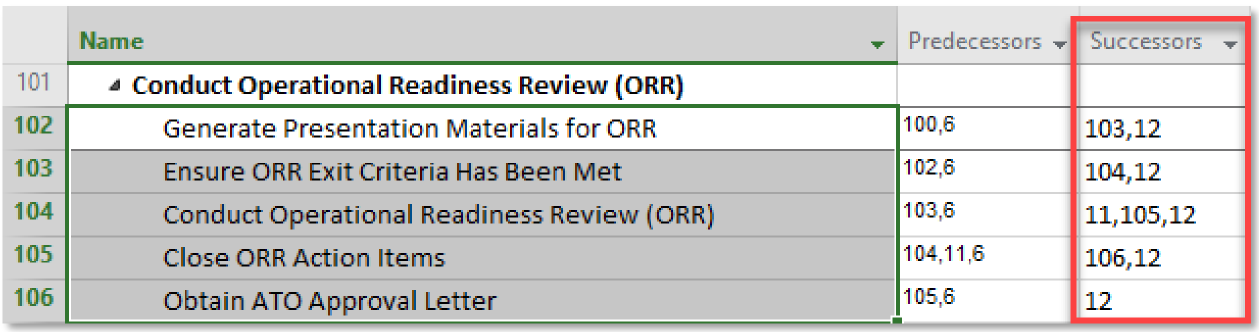

9. In the drop-down menu that opens, click **Add Common Successor**.



10. On the **Add Successors** dialog window, type ID 6 (Preliminary Design Review) in the ID of Dependency textbox, then click **Add**.




11. Inspect the Predecessors column in the Gantt table of the tasks selected. Notice that ID 6 (Preliminary Design Review) has been added to each of the tasks.



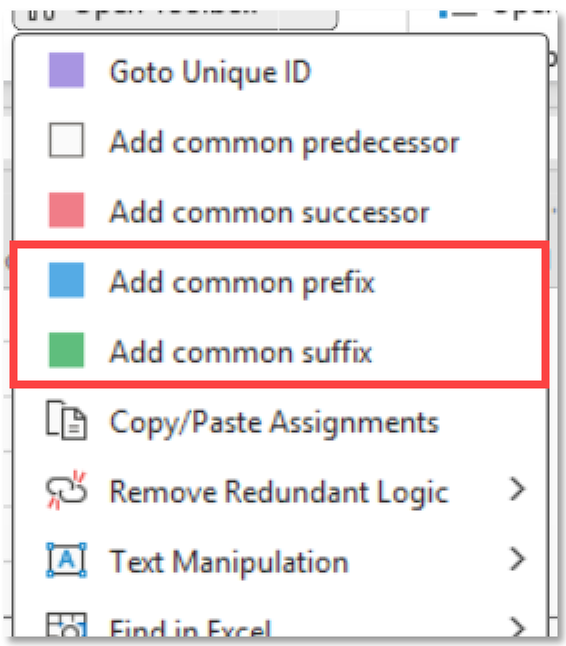
| | Name | Predecessors | Successors |
|---|---|---|---|
| 101 | Conduct Operational Readiness Review (ORR) | | |
| 102 | Generate Presentation Materials for ORR | 100,6 | 103,12 |
| 103 | Ensure ORR Exit Criteria Has Been Met | 102,6 | 104,12 |
| 104 | Conduct Operational Readiness Review (ORR) | 103,6 | 11,105,12 |
| 105 | Close ORR Action Items | 104,11,6 | 106,12 |
| 106 | Obtain ATO Approval Letter | 105,6 | 12 |

- **End of Practice Exercise**

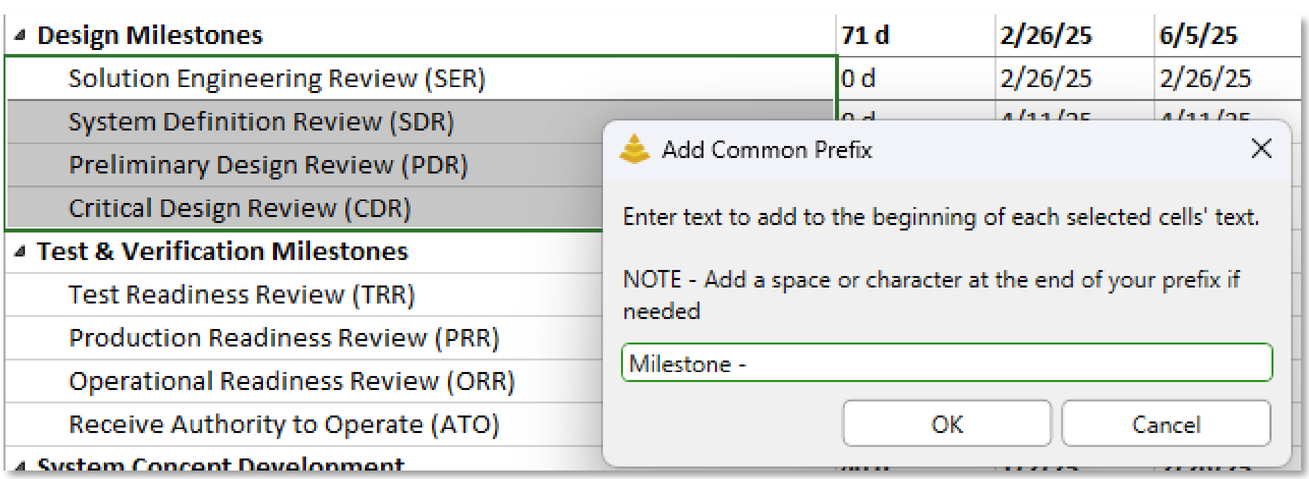
## Add Common Text Tools

Adding common text prefixes or suffixes to a group of tasks is often necessary when managing a schedule. However, doing this manually in Microsoft Project can be difficult, as there's no efficient way to copy and paste prefixes or suffixes across multiple cells.

The SSI Toolbox provides tools for adding a common prefix or suffix to selected tasks. To use them, click **Add Common Prefix** or **Add Common Suffix**.

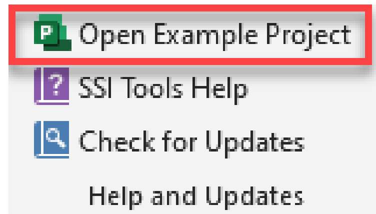



Enter the text that will be the prefix or the suffix for the cells currently selected in the Gantt Table, then click **OK** on the user input form.

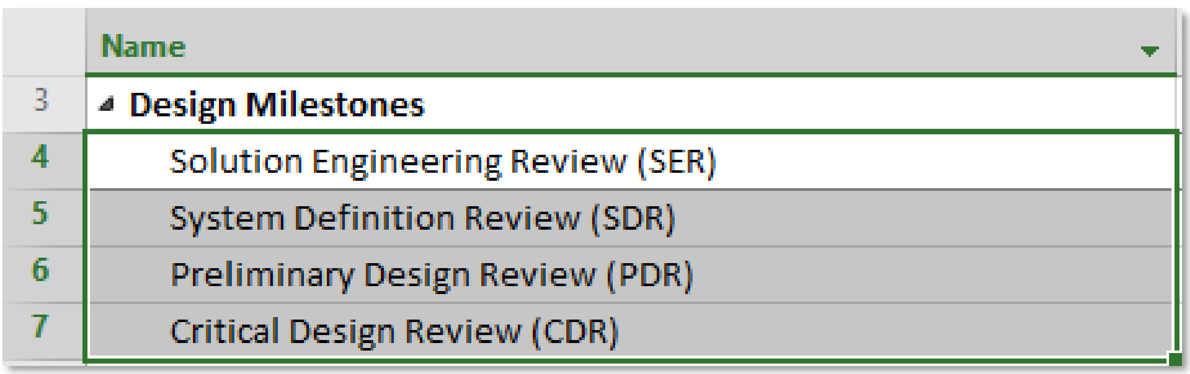


## Practice Exercise – Adding Common Prefix or Suffix

1. Open the **SSI Example Project** by clicking the **Open Example Project** button in the **SSI Analysis Tools Ribbon** in Microsoft Project.

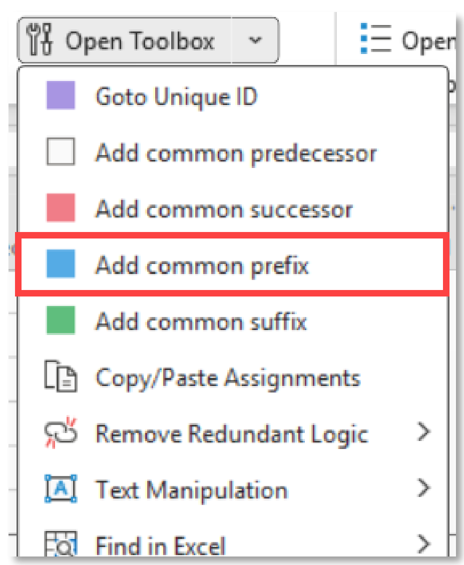



2. Select the Name field on rows 4-7 in the Example Project.

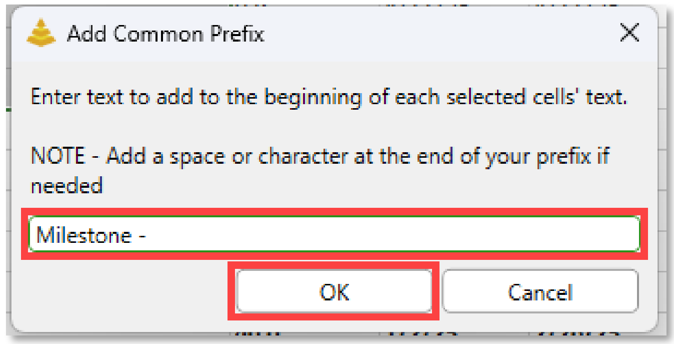



3. In the **Tools/Utilities** group of the **SSI Analysis Tools** menu, click the down carrot icon to the right of **Open Toolbox**.

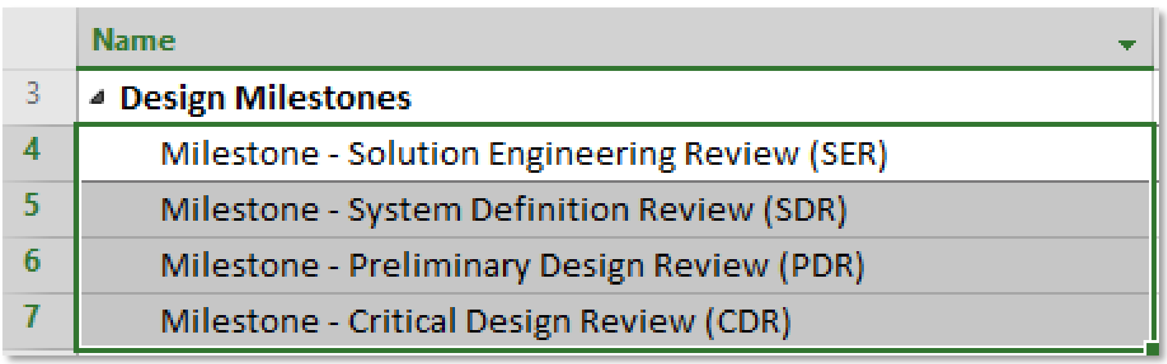

4. In the drop-down menu that opens, click the **Add Common Prefix** button.



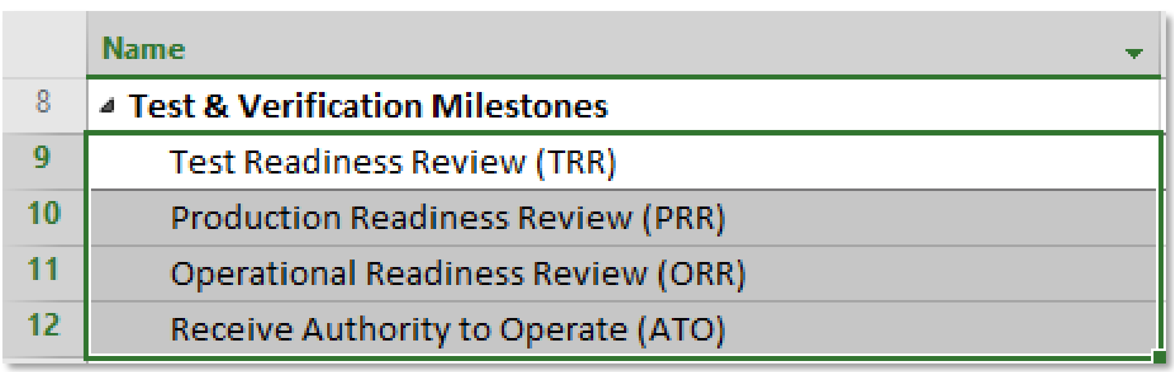
5. On the **Add a Common Prefix** dialog window, type “Milestone – “, then click **OK**.



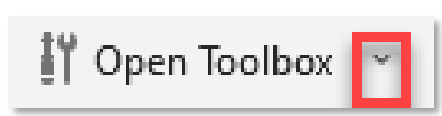

6. Inspect the Name column in the Gantt table of the tasks selected. Notice that text “Milestone – “ has been prefixed to the text in the selected cells.



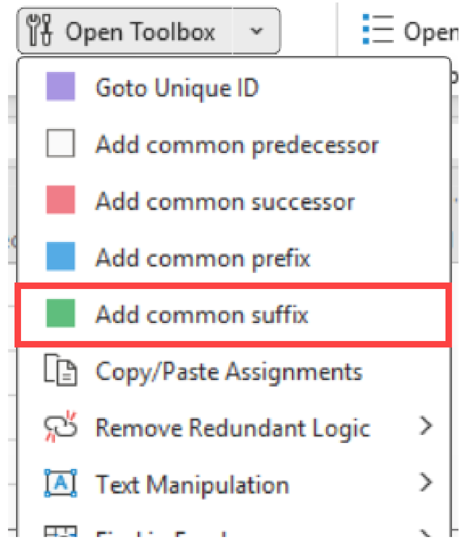

7. Select the **Name** column on rows 9-12 in the Example Project



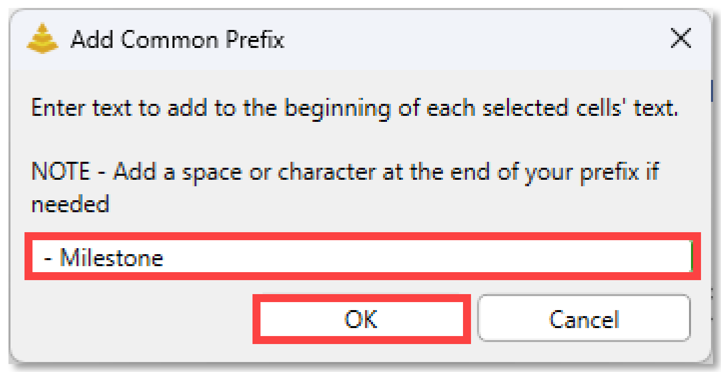

8. In the **Tools/Utilities** group of the **SSI Analysis Tools** menu, click the down carrot icon to the right of the **Open Toolbox** button.



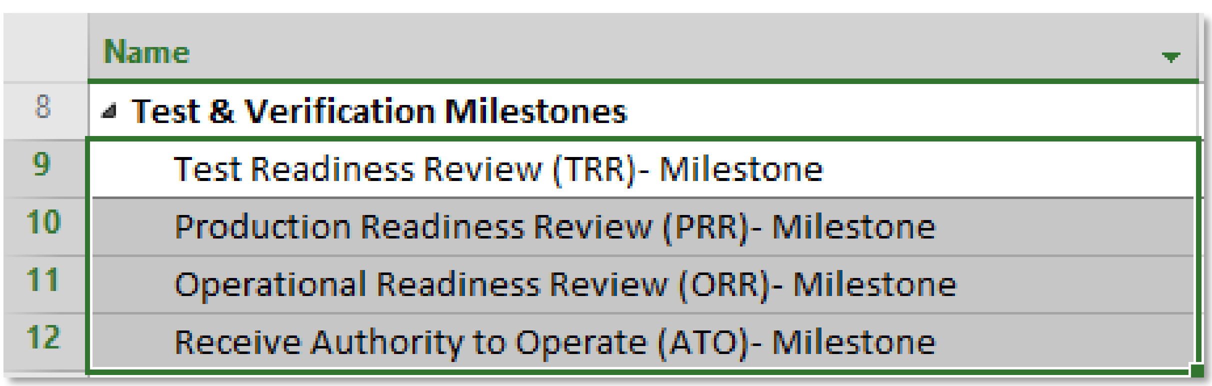
9. In the drop-down menu that opens, click **Add Common Suffix**.




10. On the **Add Common Suffix** dialog window, type " – Milestone" then click **OK**.




11. Inspect the **Name** column in the Gantt table of the tasks selected. Notice that text " - Milestone " has been suffixed to the text in the selected cells.

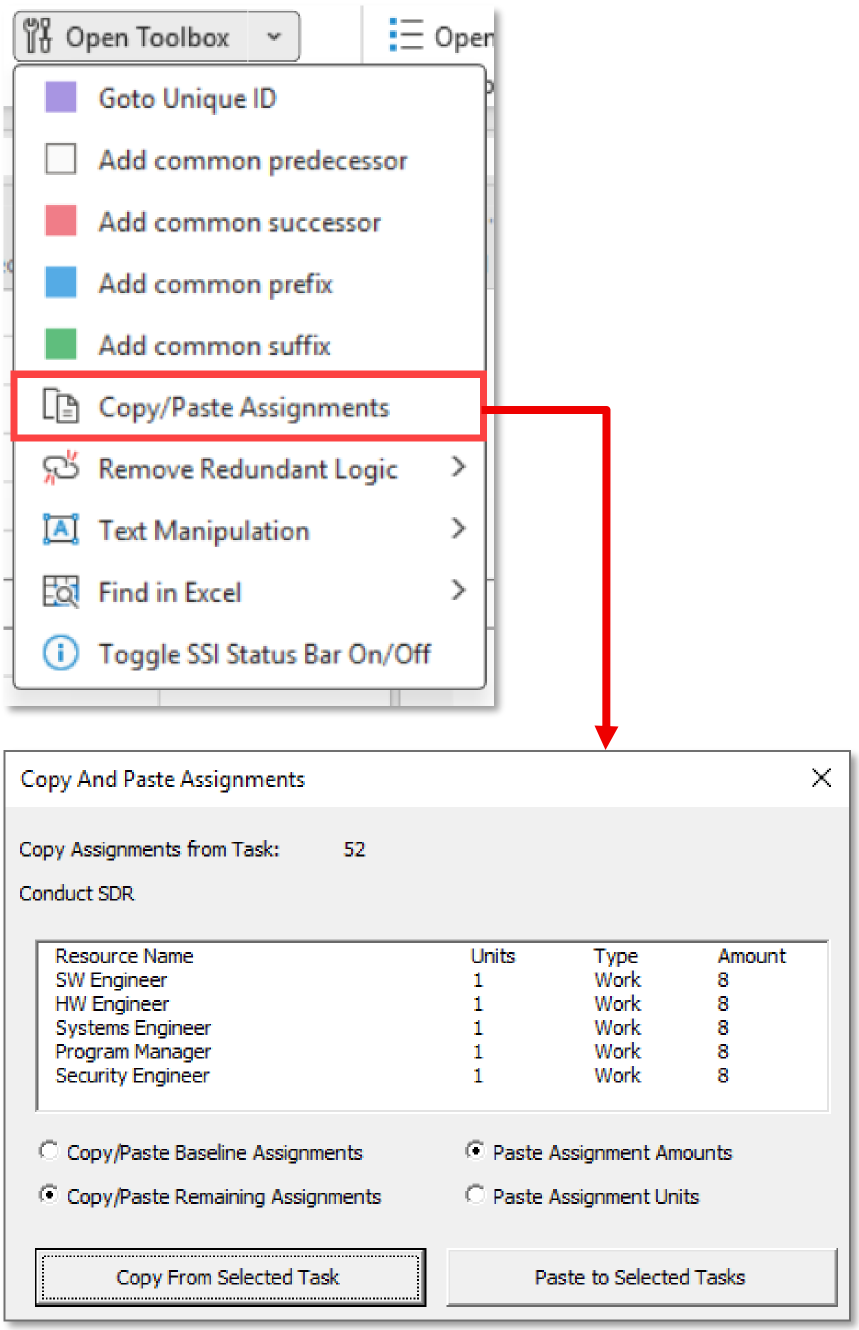



**End of Practice Exercise**

## The Copy/Paste Assignments Tool

The **Copy/Paste Assignments tool** makes it easy to copy **Resource Assignments** from one task and quickly apply them to others. When you paste the assignments, the selected tasks will receive the same resources along with the copied resources' remaining work and cost values.

To open the Copy/Paste Assignments tool, click the **Copy/Paste Assignments** button from the **SSI Toolbox** drop-down menu



## Copying Assignments

Assignments must be first copied from a task by clicking the **Copy from Selected Task** button before they can be pasted onto any other tasks. When copying assignments, the following options are available:

- **Copy/Paste Baseline Assignments** – selecting this option will ensure that the baseline assignments and baseline work/cost values of those assignments are copied into memory when the **Copy from the Selected Task** button is clicked.
- **Copy/Paste Remaining Assignments** – selecting this option will ensure that the remaining assignments and remaining work/cost values of those assignments are copied into memory when the **Copy from the Selected Task** button is clicked.

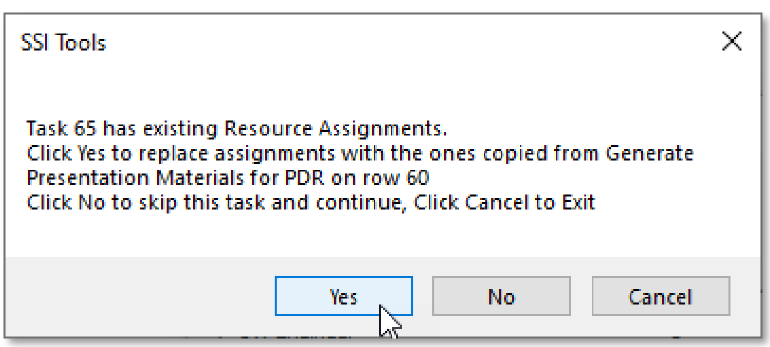
Once the **Copy from Selected Task** button has been clicked, the copied assignments will be displayed on the table in the center of the form.

## Pasting Assignments

Once assignments have been copied, they can be pasted to any tasks selected. When pasting assignments, the following options are available:

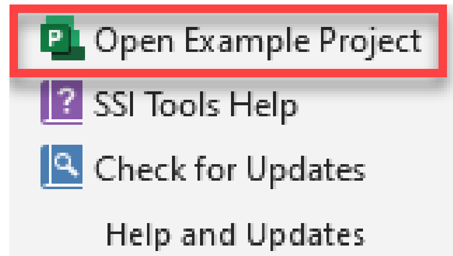
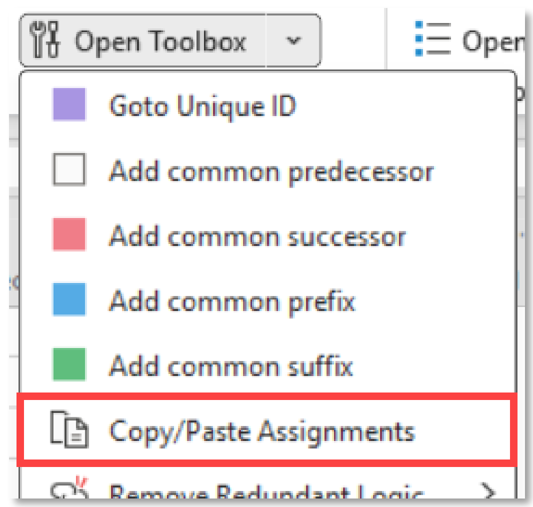
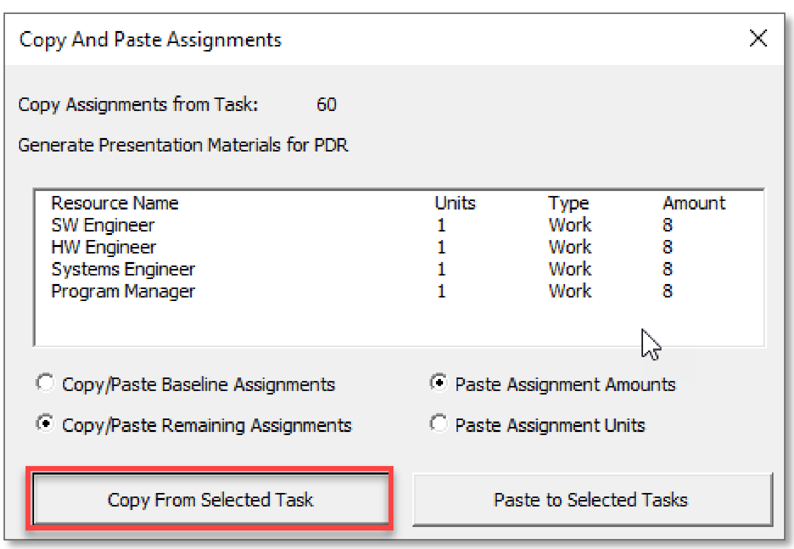
- **Paste Assignment Amounts** – selecting this option will ensure that the work/cost values of the copied assignments will be pasted onto the selected tasks when the **Paste to Selected Tasks** button is clicked.
- **Paste Assignment Units** – selecting this option will ensure that the units of the copied assignments will be pasted onto the selected tasks when the **Paste to Selected Tasks** button is clicked.

If the task that is having the copied assignments pasted onto it already has resource assignments, a prompt will open asking if the tool should replace the existing assignments.

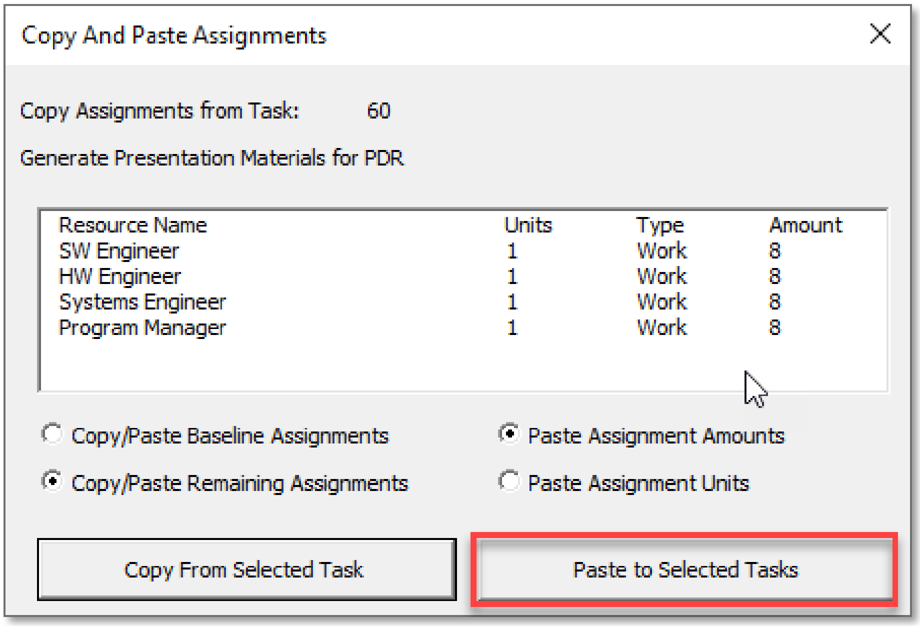



Selecting Yes to this prompt will delete the existing resource assignments and replace them with the copied resource assignments. Be careful with this option, as existing resource assignments may have an existing baseline, and replacing them will remove the baseline.

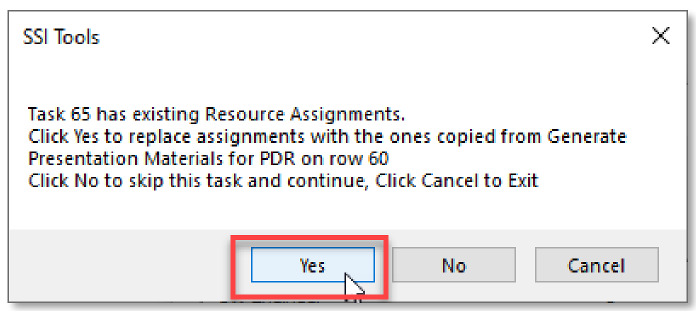
## Practice Exercise – Copying and Pasting Assignments

<table>
<tr><td>1. Open the SSI Example Project by clicking the Open Example Project button in the SSI Analysis Tools Ribbon in Microsoft Project.</td><td>
</td></tr>
<tr><td>2. Open the Copy/Paste Assignments tool by clicking the Copy/Paste Assignments button in the SSI Toolbox drop-down menu.</td><td>
</td></tr>
<tr><td colspan="2">3. Select the task titled Generate Presentation Materials for PDR (row 60). Use the Copy/Paste Assignments form to copy the assignments.<br>
</td></tr>
</table>

4. Select any other non-summary, non-milestone task and paste the assignments onto it.



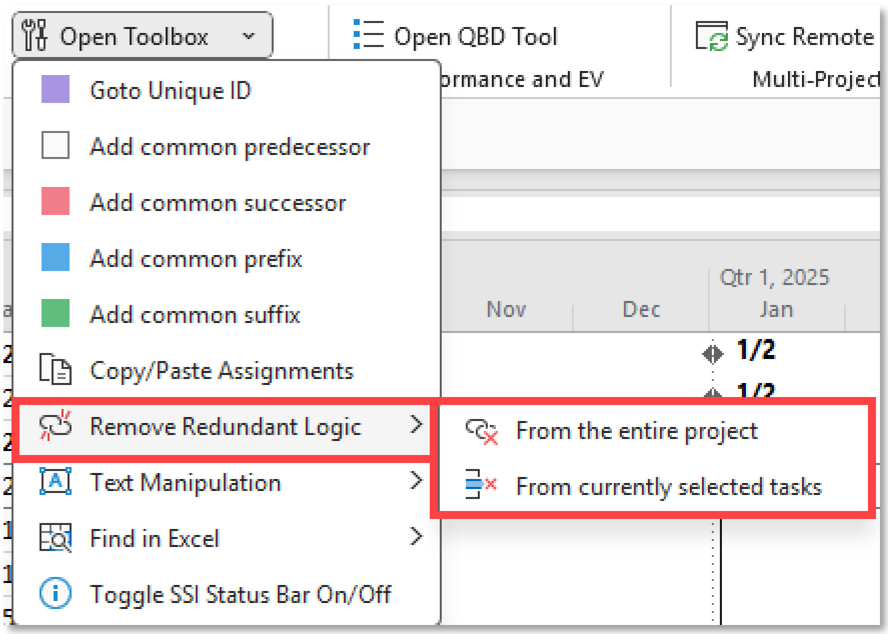

5. If the task you are pasting resource assignments to has existing assignments, say **Yes** to the prompt that opens asking if you would like to replace the existing assignments with the ones copied.




**End of Practice Exercise**

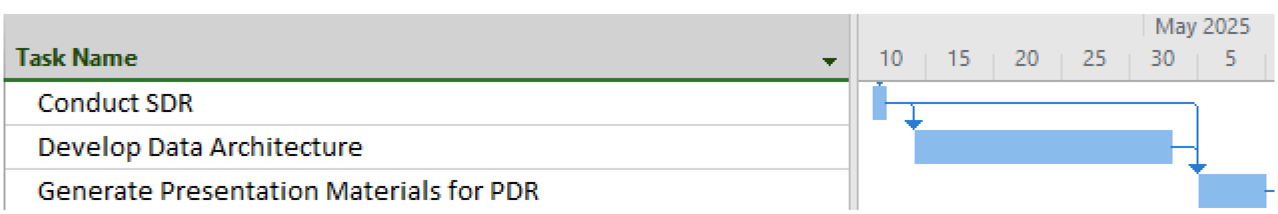
## Removing Redundant Logic

The **Remove Redundant Logic** feature in the SSI Toolbox has the ability to remove redundant logic links from all activities in the schedule or just the currently selected activities.



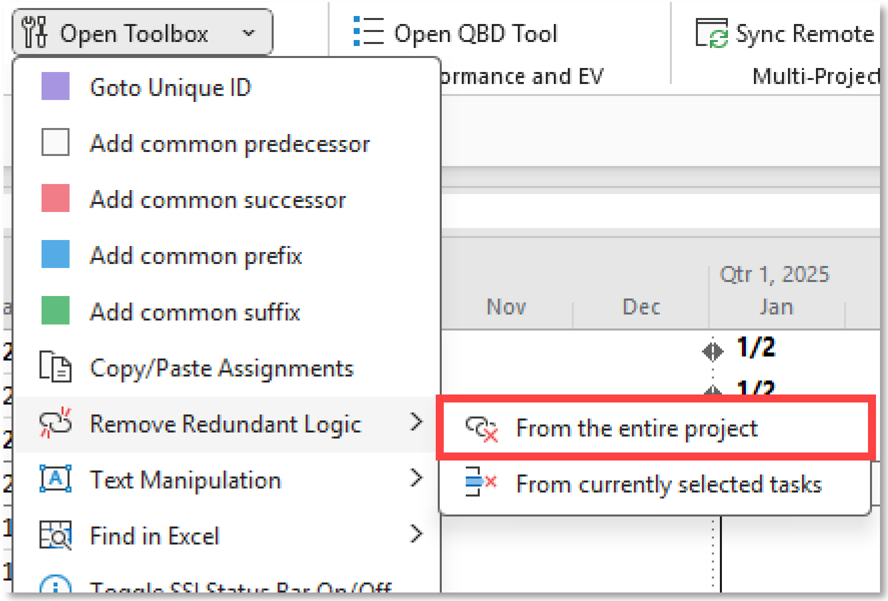

A **redundant logic link** refers to a dependency (predecessor or successor relationship) that is unnecessary because the scheduling logic *already* accounts for the task sequencing through other links. These links do not affect an activity's start or finish dates and can clutter the schedule without adding value.

Observe the following example:

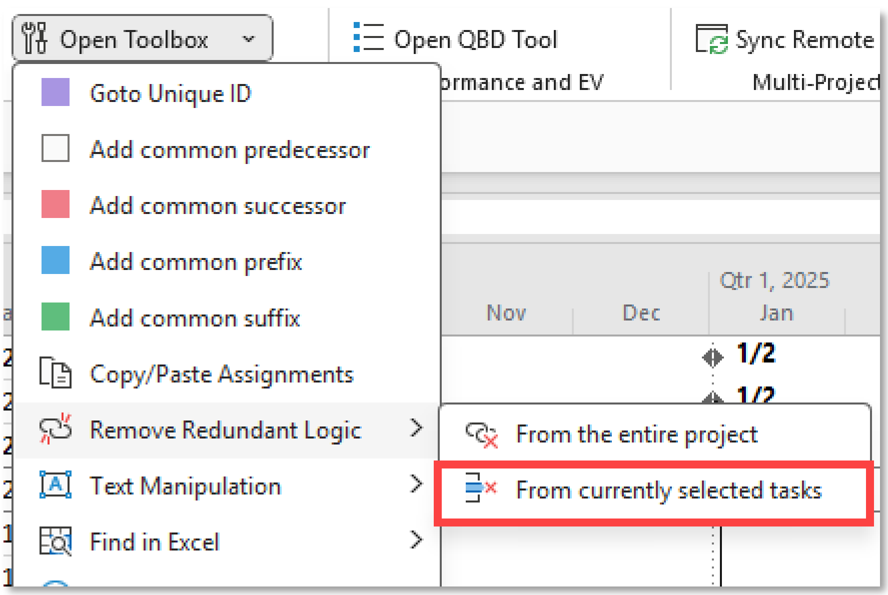



In the image above, the task **Conduct SDR** is linked to both **Develop Data Architecture** and **Generate Presentation Materials for PDR**. However, the direct link between **Conduct SDR** and **Generate Presentation Materials for PDR** is redundant, since that task is already dependent on **Develop Data Architecture**, which in turn depends on **Conduct SDR**.

To remove all redundant logic links from the entire schedule, click the **From the entire project** button in the Remove Redundant Logic submenu:




To remove all redundant logic links from just the activities currently selected in Microsoft Project, click the **From currently selected tasks** button in the Remove Redundant Logic submenu:




Depending on the size and complexity of the schedule, this process can be time consuming and take anywhere from a few seconds to several minutes.

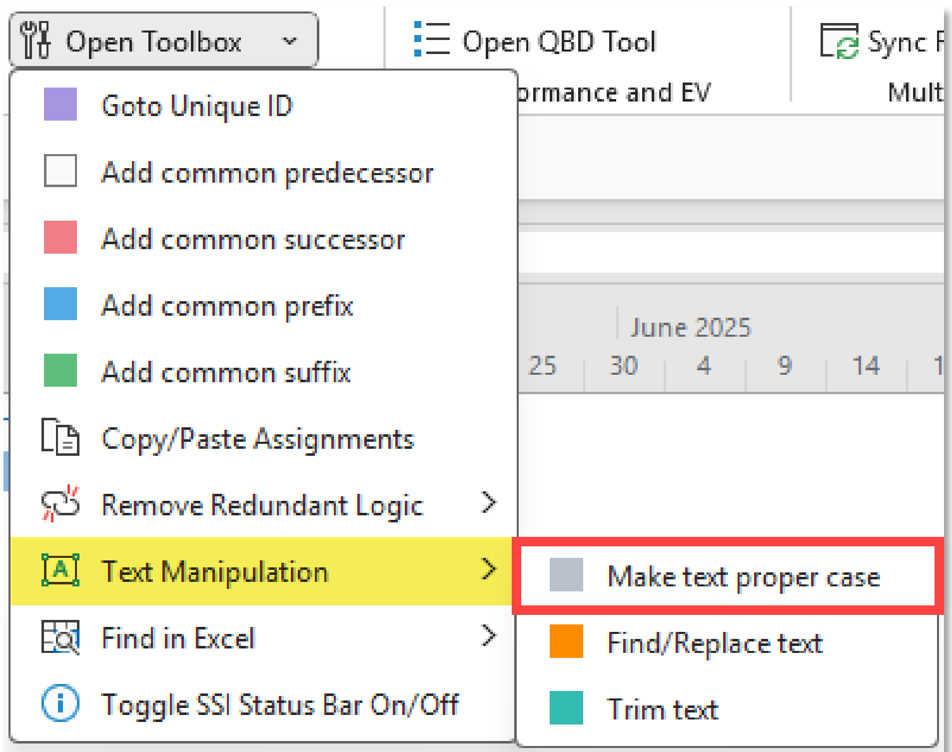
**Note**: It is strongly recommended to save a copy of the Project file before beginning the process of removing redundant logic.

## Making Text Proper Case

"Proper" casing means the first word and any proper noun in a text string is capitalized. It's a best practice to proper case all task names in the schedule. This helps the schedule maintain a professional appearance of the schedule to those who examine it.

The **Make Text Proper Case** button in the SSI Toolbox will automatically properly case the text of any cells selected that contain text data. The tool can recognize acronyms and does not alter their capitalization format.

To use this tool, first select the cells that contain text that you wish to properly case. Then Select the **Make Text Proper Case** button in the **Text Manipulation submenu** of the **SSI Toolbox** menu.




This tool can transform a text from something like this:

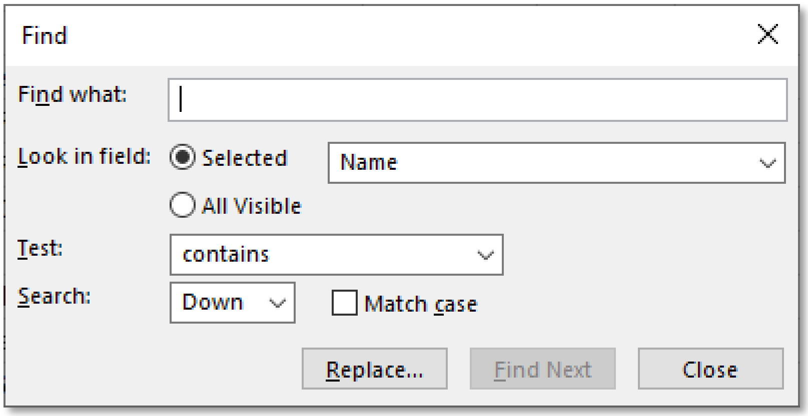
initiate Development of system Security plan (SSP)

To this:

Initiate Development of System Security Plan (SSP)

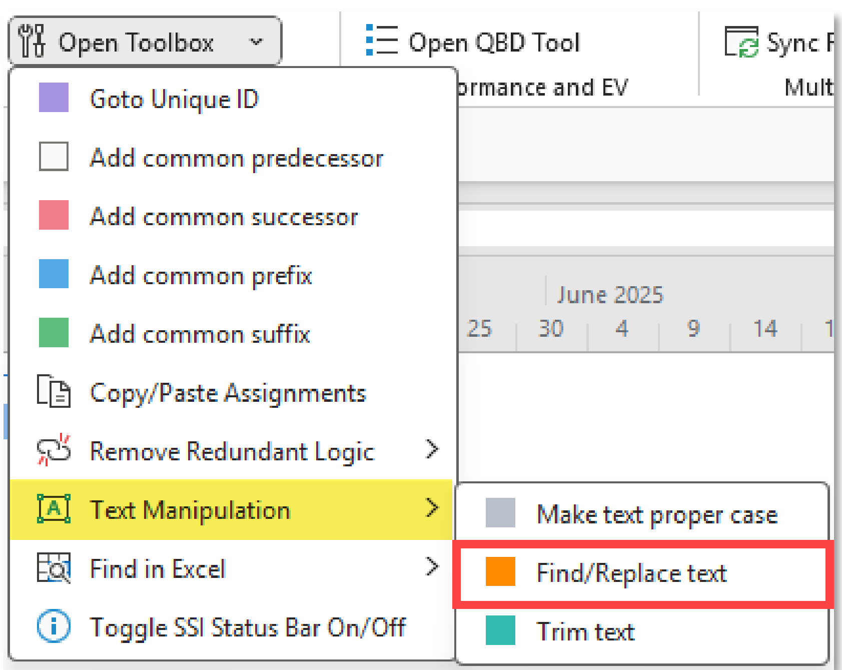
## Finding and Replacing Text

Unlike other Microsoft Office applications such as Excel, Microsoft Project offers limited Find & Replace functionality. Pressing Ctrl + F in Microsoft Project opens the following dialog window:

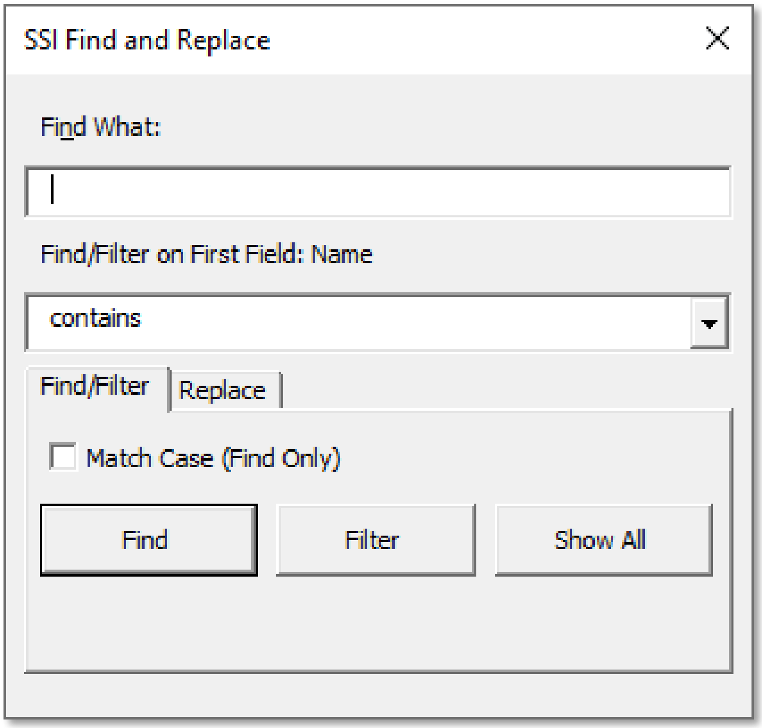



In this dialog Microsoft Project typically defaults to searching the **Name** field, even though users often need to search data in other fields. To do so, you must manually select a different field from the dropdown menu, an extra step many users find inconvenient, especially when compared to Excel's more flexible and user-friendly Find and Replace feature.

To address this limitation, SSI developed a custom Find and Replace tool for Microsoft Project. You can access it by clicking the **Find/Replace Text** button in the **SSI Toolbox** menu.



Clicking this button will open the **SSI Find and Replace Tool**:

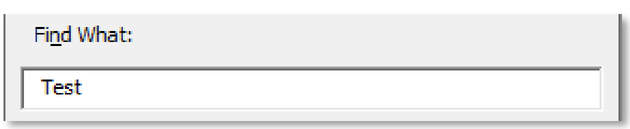



Using this tool, users can find, filter, and replace the text they are searching for in their current selection. This tool will search all cells in the current selection.

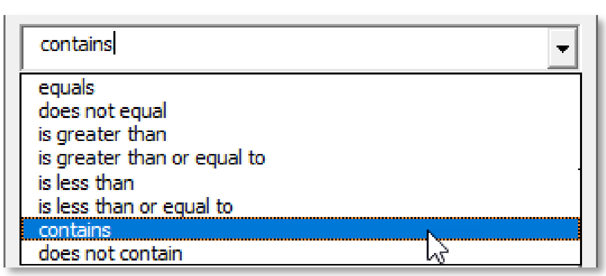
## Finding or Filtering Text Values

To find a text value, follow these steps:

1. Type the text being searched in the top textbox in the SSI Find and Replace form.




2. Select an evaluation option.



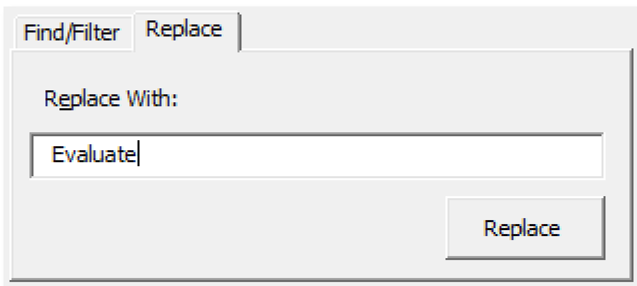

3. With the tab control set to **Find/Filter**, click either the **Find** or **Filter** button.

## Replacing Text Values

To replace a text value, complete the following steps:

1. Type the text being searched in the top textbox in the SSI Find and Replace form.


2. Set the tab control to **Replace** and then type the value that will replace the search text.




3. Click the **Replace** button. This will replace all text found in the current selection with the replacement text.

## Trimming Leading and Trailing Spaces

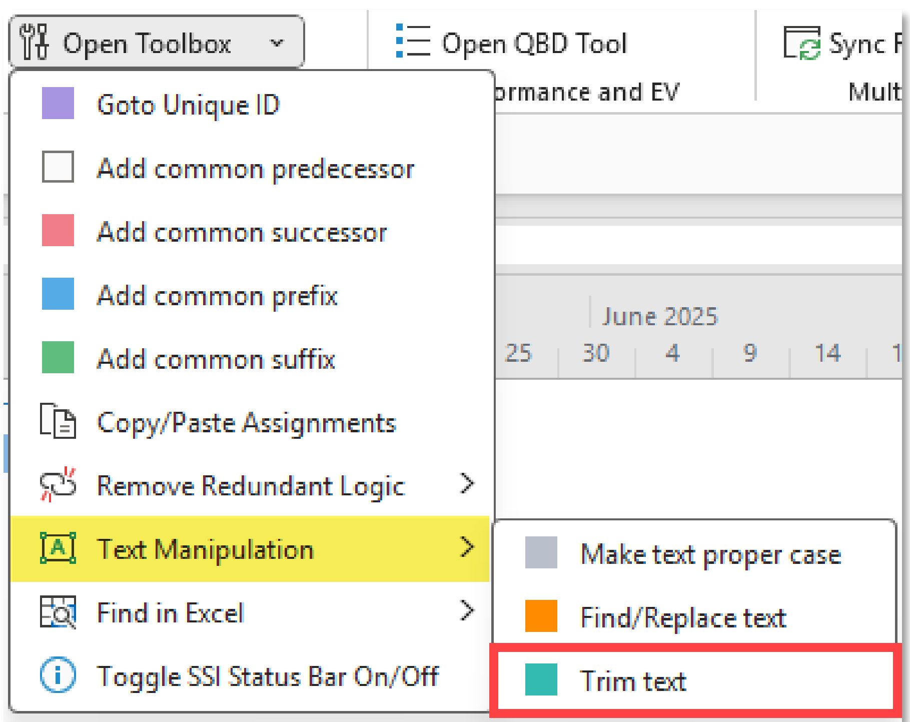
**Leading and trailing spaces** are unnecessary blank characters at the beginning or end of a text string.

For example, consider the following task name, which contains unintended leading spaces:


These extra spaces are often introduced accidentally - either through manual entry or when copying and pasting from other sources - and frequently go unnoticed. However, it's considered best practice to remove them to maintain a clean, professional schedule.

In addition to affecting readability, leading and trailing spaces can cause issues when exporting Microsoft Project data to other tools. For instance, the **Integrated Program Management Data Analysis Report (IPMDAR)**, specifically the **Schedule Performance Dataset (SPD)**, will trigger validation errors if task names contain such spaces.

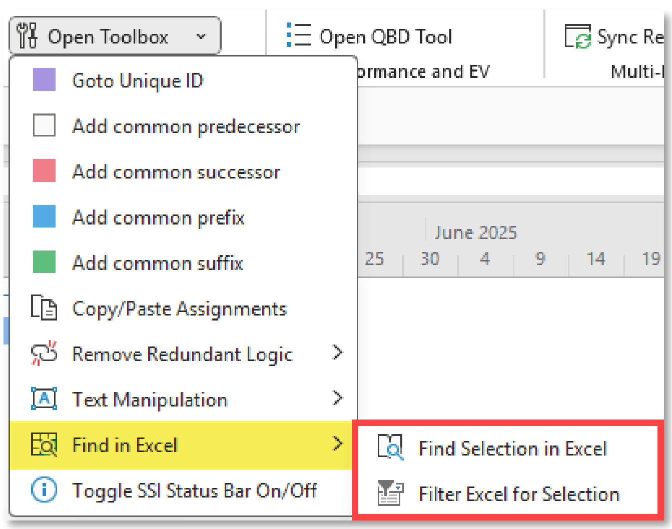
The **Trim Text** tool in the SSI Toolbox automatically removes unnecessary leading and trailing spaces from any selected cells containing text data. To use this tool, simply select the text-containing cells in the Gantt table, then click the **Trim Text** button in the **SSI Toolbox** menu.



## Finding and Filtering for Values in Excel

Microsoft Project users frequently work with **Excel spreadsheets** that include data exported from schedule files. At times, it becomes necessary to locate or filter specific schedule data within these spreadsheets. While this can be done manually using Ctrl + F in Excel, the process can become tedious, especially when repeated multiple times for different values.

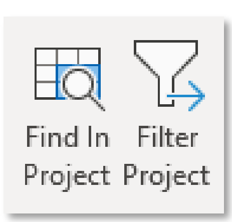
The **Find on Excel** buttons in the SSI Toolbox simplify the process of locating or filtering schedule values in the active Excel spreadsheet. Just select the value(s) you want to find or filter for in the Gantt Chart, then click the **Find Selection in Excel** or **Filter Excel for Selection** buttons.




The **Find Selection in Excel** button locates the value from the first selected cell in Microsoft Project and selects the first cell that contains the same value in the active Excel worksheet. Clicking the button again will find the next matching cell with the same value, allowing you to cycle through all occurrences.

The **Filter Excel for Selection** button applies a filter in the active Excel worksheet based on the values currently selected in Microsoft Project. Note that the selected data must be from a single column.

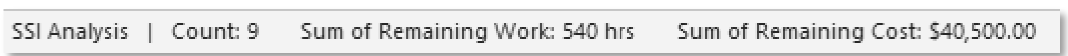
If you have the **SSI Tools for Microsoft Excel** add-in installed, you can also locate or filter for values selected in an Excel spreadsheet within Microsoft Project. Simply use the **Find in Project** or **Filter Project** buttons located on the **SSI Tools** tab in Excel.



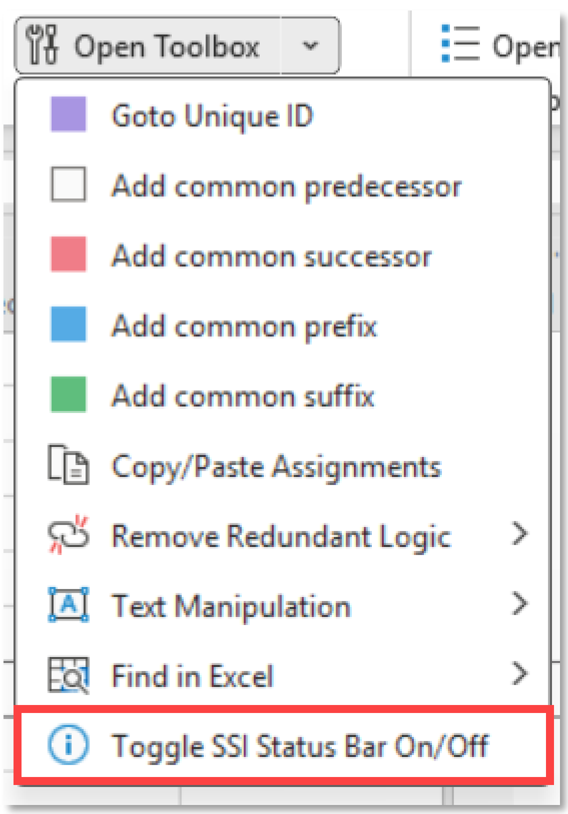
## The SSI Status Bar

In Microsoft Excel, users are shown a **status bar** at the bottom right corner of the application window that displays aggregated information about the cells selected.


Microsoft Project doesn't include a built-in status bar, but many users want quick visibility into key details about their selected tasks. To meet this need, we developed the SSI Status Bar, which displays the number of selected tasks along with the total remaining work and remaining cost.




By default, the **SSI Status** bar will be turned on after a user has **SSI Tools for Microsoft Project** installed, but it can be toggled off by clicking the **Toggle SSI Status Bar On/Off** button in the SSI Toolbox.




**NOTE** – Users who connect the Microsoft Project desktop application to **Project Server or Project Online** may be used to seeing the "save status" of their project files. This will not be displayed if the SSI Status bar is turned on. For Project Server users who would like to see the "save status", turn the SSI Status Bar off.