

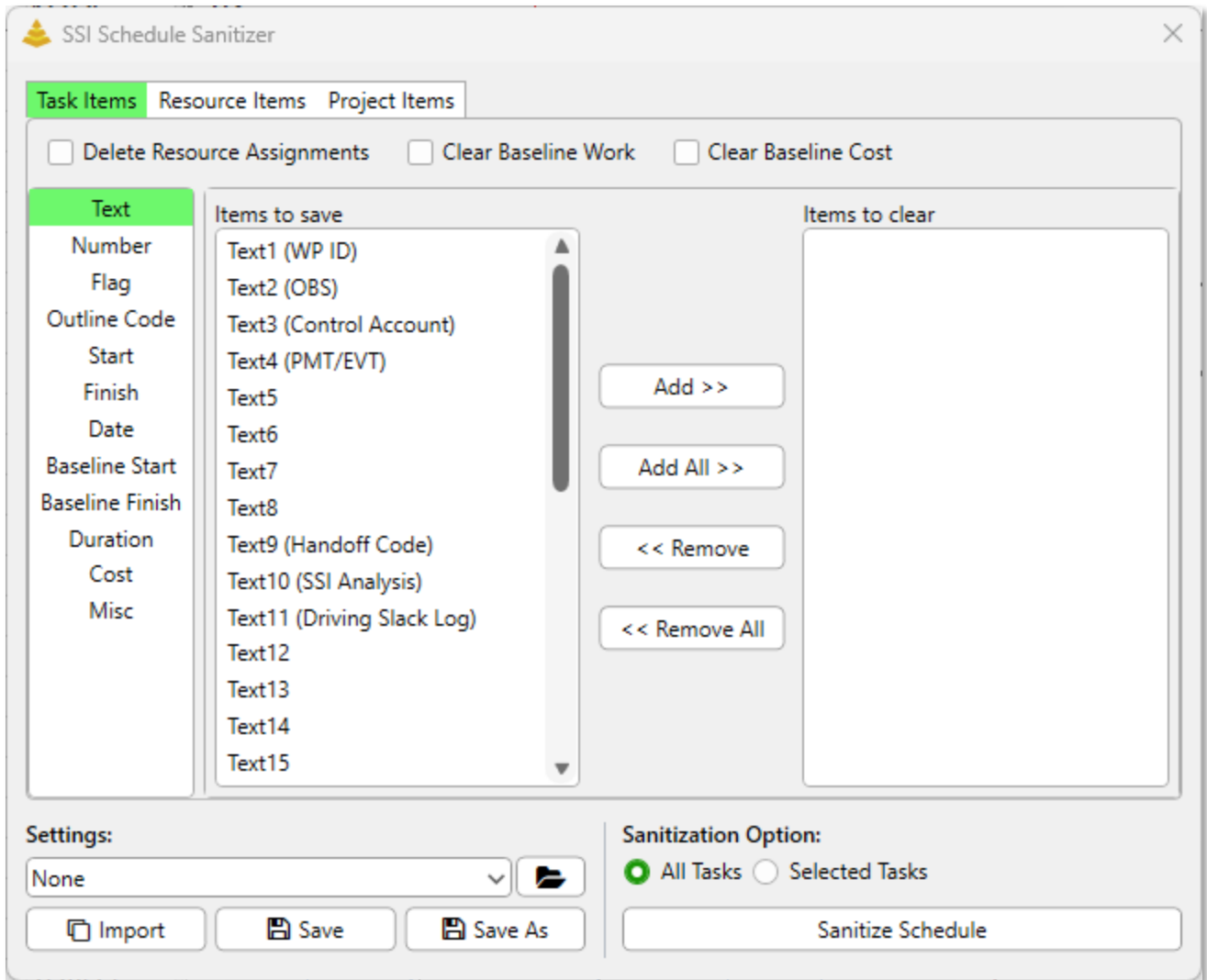
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SSI Schedule Sanitizer

Overview

The **SSI Schedule Sanitizer** is a tool built to help users remove nonessential/unnecessary, and/or proprietary data from a Microsoft Project schedule file prior to sending it to an outside organization. Every organization should require Project Schedulers to, at a minimum, remove any proprietary information from a Project file prior to transferring the file to an outside entity. The **SSI Schedule Sanitizer** makes the process of removing this data quick and easy. The tool allows users to save and distribute sanitization configurations which can be easily applied at any time.



The screenshot shows the SSI Schedule Sanitizer application window. It has a title bar with the application name and a close button. Below the title bar are three tabs: "Task Items" (selected), "Resource Items", and "Project Items". Under the "Task Items" tab, there are three checkboxes: "Delete Resource Assignments", "Clear Baseline Work", and "Clear Baseline Cost". Below these are two main sections: "Items to save" and "Items to clear". The "Items to save" section has a list of items: Text1 (WP ID), Text2 (OBS), Text3 (Control Account), Text4 (PMT/EVT), Text5, Text6, Text7, Text8, Text9 (Handoff Code), Text10 (SSI Analysis), Text11 (Driving Slack Log), Text12, Text13, Text14, and Text15. The "Items to clear" section is empty. Between these two sections are four buttons: "Add >>", "Add All >>", "<< Remove", and "<< Remove All". At the bottom, there are two sections: "Settings:" and "Sanitization Option:". The "Settings:" section has a dropdown menu set to "None" and a folder icon. The "Sanitization Option:" section has two radio buttons: "All Tasks" (selected) and "Selected Tasks". Below these are three buttons: "Import", "Save", and "Save As". A large "Sanitize Schedule" button is located at the bottom right.

Definitions

Sanitizing the Schedule – The process of removing nonessential and/or proprietary data from the schedule file. This document also refers to this term as **Schedule Sanitization**.

Nonessential/Unnecessary Data – Data that exists in the Project file that provides no additional value to the organization receiving the project file, but is not considered to be sensitive or secret to the user's internal organization.

Proprietary Data – Data that exists in the Project file that is considered to be sensitive, confidential, or secret to the user's internal organization. An example of proprietary information may be rates for individual resources.

Controlled Unclassified Information is a category of information defined by the U.S. federal government. Abbreviated as CUI. Controlled unclassified information is government-owned data that requires certain security controls to safeguard it from unauthorized access.

Task Items – Task items are data in the schedule held at the task level. Each task can have unique values for these items. An example of a Task Item is a Task Field such as Text1-30.

Resource Items – Resource items are data in the schedule held at the resource level. Each resource can have unique values for these items. An example of a Resource Item is the **Standard Rate** applied to a resource.

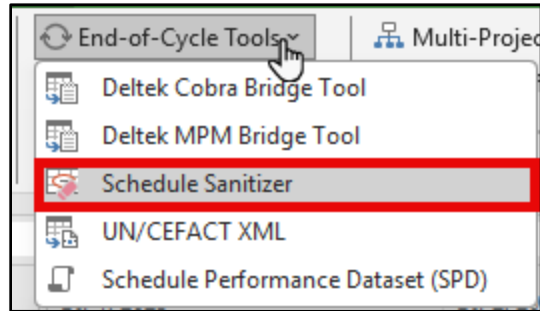
Project Items – Project items are data in the schedule held at the project level. Each Project may have different data for these items. An example of a Project Item is a custom view that exists only in that project.

Things that DO NOT get sanitized: (Anything that would compromise the integrity of the schedule)

- Task Durations
- Start/Finish Dates
- Baseline Start/Finish
- Dependencies
- Relationship Types

Getting Started

To open the **SSI Schedule Sanitizer**, click the **End-of-Cycle Tools** button in the **Performance and EV** group of the **SSI Analysis Tools** tab in MS Project.

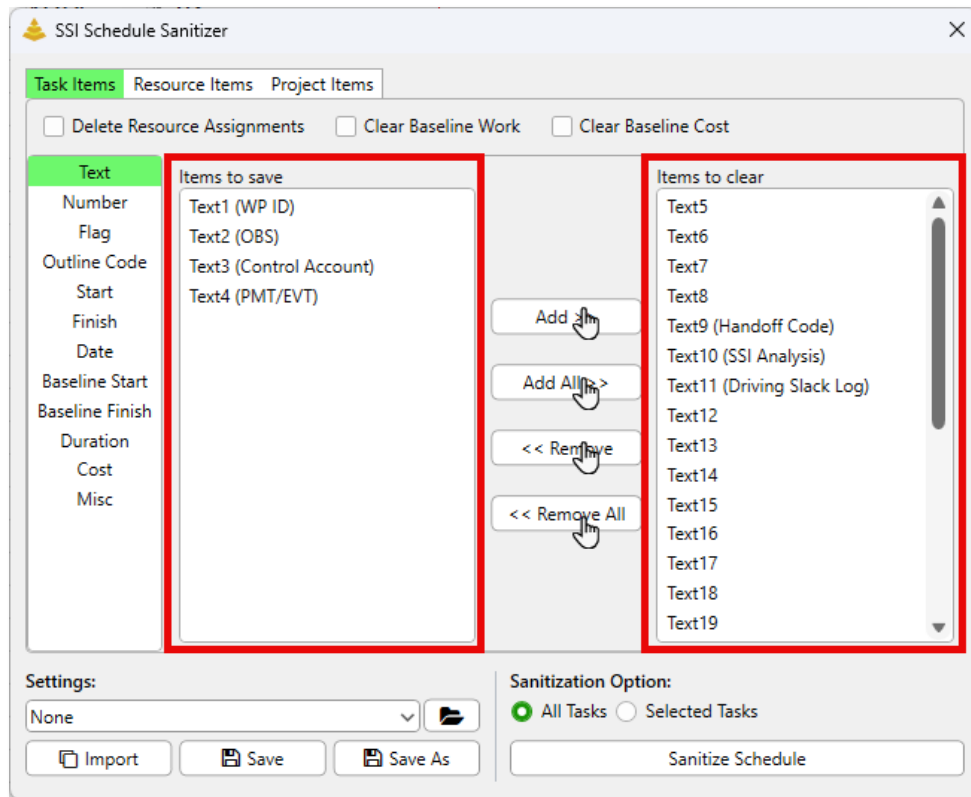


The **SSI Schedule Sanitizer** will allow users to sanitize three major types of items from the project schedule. These items are:

- **Task items**
 - Task fields that you can enter data into the Gantt Table view of MS Project (example: Task Text1-30, Number1-20, Outline Code1-10, etc.).
 - Resources assigned to tasks.
 - Baseline work and/or Baseline Cost values (includes removing the time-phased values of these items).
- **Resource Items**
 - Resource fields that you can enter data into in the Resource Sheet view of MS Project (example: Resource Text1-30, Number1-20, Outline Code1-10, etc.).
 - Resources themselves from the Resource Sheet.
 - Resource Cost Rates.
- **Project Items**
 - Custom Project level items such as Views, Tables, Filters, Groups, Macros, Summary Properties and Custom Properties.

Setting Items to be Sanitized

Tabs within the **SSI Schedule Sanitizer** will contain two list box controls. The list box control on the left side is the **Items to Save** list. The list on the right side is the **Items to Clear** list. Items can be moved back and forth between the two lists by using the Add and Remove buttons. When the Schedule Sanitization occurs, data in the **Items to Clear** list will be removed, while data in the **Items to Save** list will be preserved.



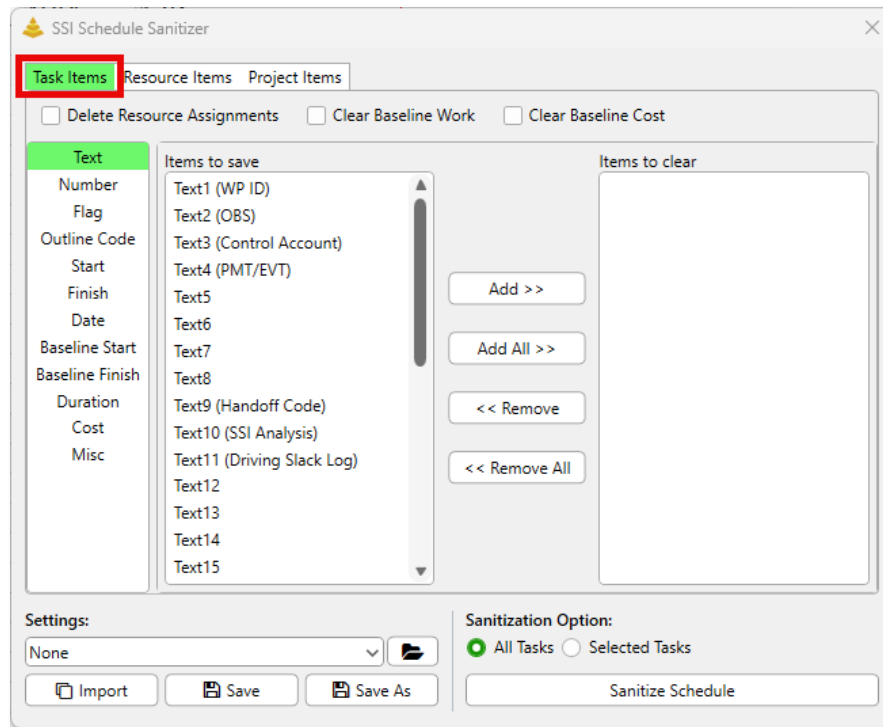
Clicking the **Add >>** button will move any items you have selected in the **Items to Save** list to the **Items to Clear** list.

Clicking the **Add All >>** button will move all of the items in the **Items to Save** list to the **Items to Clear** list, regardless if they are selected or not.

Clicking the **<< Remove** button will move any items you have selected in the **Items to Clear** list to the **Items to Save** list.

Clicking the **<< Remove All** button will move all of the items in the **Items to Clear** list to the **Items to Save** list, regardless if they are selected or not.

Task Items Tab

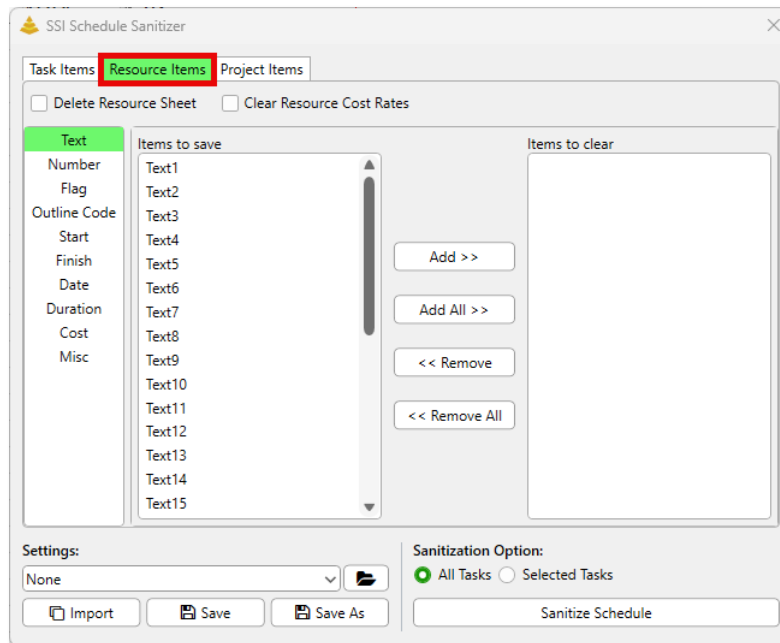


The Task Items Tab allows users to choose which task level data to be removed when the Schedule Sanitization occurs. Users have options to delete the following:

- **Task Fields** – Users can choose which task fields to remove data from and which task fields will retain their data.
Note: If the **Sanitization Option** is set to **All Tasks**, the custom names and formulas of the fields chosen to be cleared will be removed.
- **Resource Assignments** – Choosing to delete the resource assignments will remove any resource assignments from the tasks that are sanitized. Because the resource assignments are removed, work and cost value of tasks will be set to zero. Baseline work and cost values are preserved unless the options to remove baseline work and/or baseline cost are specifically checked.
- **Baseline Work** – Choosing the option to delete baseline work will set the value of baseline work to zero on the tasks that are sanitized. This includes removing the time-phased baseline work values.
- **Baseline Cost** – Choosing the option to delete baseline cost will set the value of baseline cost to zero on the tasks that are sanitized. This includes removing the time-phased baseline cost values.

Note: Even though there are options to remove baseline work and cost values, the Schedule Sanitizer will **never** remove baseline start/finish dates or the baseline duration value from tasks in the Project.

Resource Items Tab

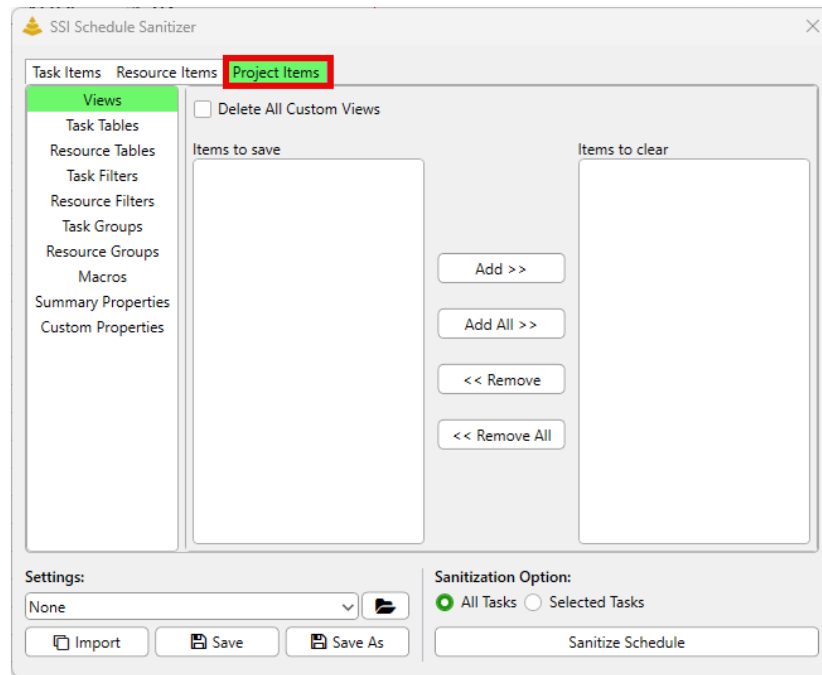


The Resource Items Tab allows user to choose which resource level data to be removed when the Schedule Sanitization occurs. Users have options to delete the following:

- **Resource Fields** – Users can choose which resource fields to remove data from and which resource fields will retain their data. The custom names and formulas of the fields chosen to clear will also be removed. If the **Delete Resource Sheet** option is chosen, all the resource fields will automatically have their custom names and formulas removed.
- **The entire Resource Sheet** – Choosing this option will delete all resources from the resource sheet and remove any custom names and formulas from any of the resource fields in the resource sheet. Choosing this option also removes all the resource assignments from all tasks. Note this option will only be followed if the **Sanitization Option** is set to **All Tasks**.
- **Resource Cost Rates** – Choosing this option will remove all the cost rates (standard rate, overtime rate, cost/use rate) and associated rate tables from all resources in the resource sheet.

Note: Deleting resource assignments or resources from the resource sheet can potentially change start/finish dates and/or duration values on tasks in the schedule. While running, the SSI Schedule Sanitizer performs many functions to ensure tasks remain consistent with their pre-sanitized dates and duration to the maximum extent possible. In some circumstances, however, it is not possible to remove resources from tasks and retain their original date and duration values. Following general scheduling and Microsoft Project best practices and conducting regular schedule quality control checks is the best way to avoid any unwanted changes to tasks post-sanitization. We recommend [The Planning and Scheduling Excellence Guide \(PASEG\)](#) and [The GAO Schedule Assessment Guide](#) as good reference points for scheduling best practices.

Project Items Tab



The Project Items Tab allows users to choose which project level data to be removed when the Schedule Sanitization occurs. Project level data includes the following:

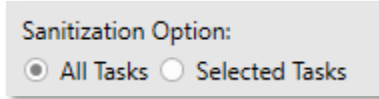
- Custom views
- Custom tables
- Custom filters
- Custom groups
- Macros saved in the project file
- Project summary properties
- Project custom properties

Project summary and **Custom Properties** can be viewed in the Project Properties dialog by clicking **File → Info → Project Information → Advanced Properties**.

Note - Certain custom project properties are set by SSI Tools. For example, SSI's **SRA + Sensitivity Analysis** tool records project specific settings as custom project properties. These settings are recalled the next time the tool is used. Be careful not to clear project settings that should be retained for future tool use if you plan to continue using the Project file post-sanitization.

Each Project Item tab (except for the Summary Properties Tab) includes a checkbox control to delete all custom items. Turning this option on will ensure the **SSI Schedule Sanitizer** will remove all custom items even if new ones are added, or existing ones are renamed from the time the SSI Schedule Sanitizer settings are saved.

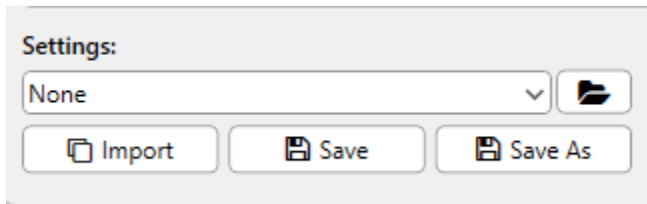
Sanitization Option

A dialog box titled "Sanitization Option:" with two radio buttons. The first radio button is selected and labeled "All Tasks". The second radio button is labeled "Selected Tasks".

The SSI Schedule Sanitizer allows for sanitization to occur on all tasks in the schedule or only the selected tasks in the schedule.

- **All Tasks** – This option will ensure that every task in the schedule is sanitized of all the items selected in the **Task Items** tab, in addition, all the items selected in the **Resource Items** and **Project Items** will be sanitized.
- **Selected Tasks** – This option will ensure that only the *currently selected* tasks will be sanitized of the items selected in the **Task Items** tab. Custom task field names and formulas will not be removed, but the data within those fields will be removed from the selected tasks (unless the field follows a formula). In addition, all the items selected in the **Resource Items** and **Project Items** will be sanitized, however, the option to **Delete Resource Sheet** will not be disabled.

Saving SSI Schedule Sanitizer Settings

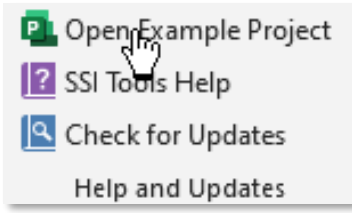
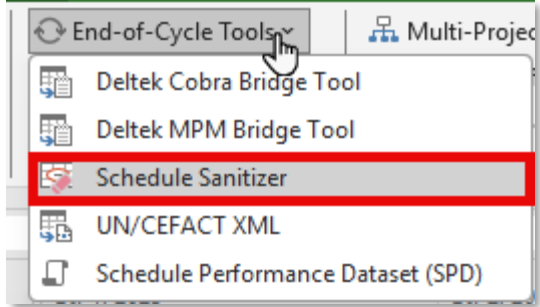
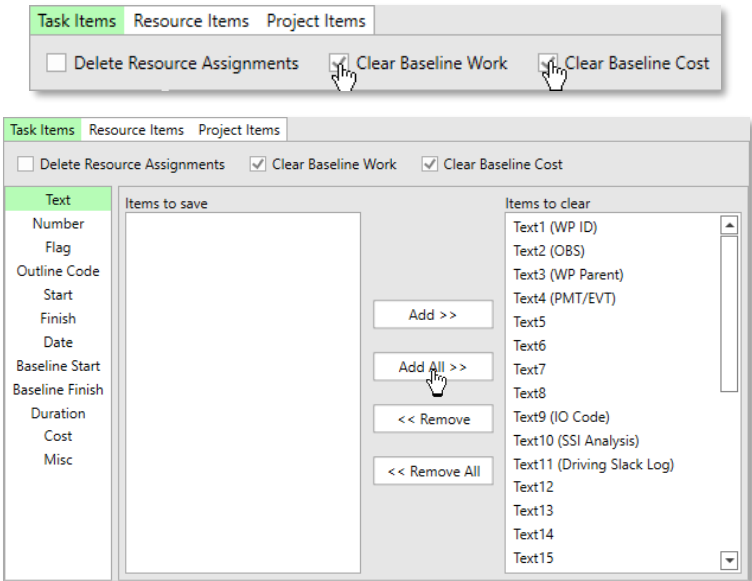
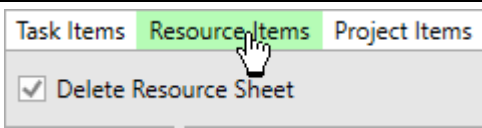
A dialog box titled "Settings:" with a dropdown menu showing "None" and a folder icon button. Below the dropdown are three buttons: "Import" (with a folder icon), "Save" (with a floppy disk icon), and "Save As" (with a floppy disk icon).

The **SSI Schedule Sanitizer** allows user to save settings configurations that can be toggled and reapplied at later times. These configuration files are saved as .json files and are stored in the user's SSI Tools installation location. Sanitizer Settings Configuration files can be distributed to and imported by other users.

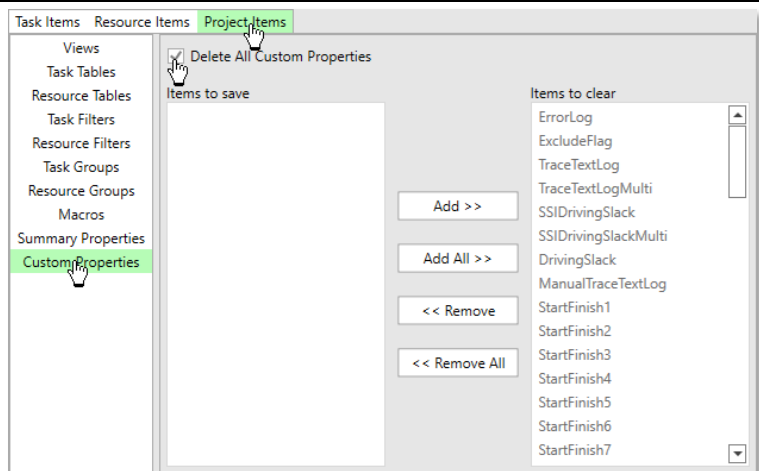
Clicking the **Save As** button will open a dialog box to give the settings configuration a name. Once the name is entered, a settings configuration will be created for the currently applied options set in the SSI Schedule Sanitizer form.

Clicking the **Save** button will overwrite the existing settings for a configuration with the current settings.

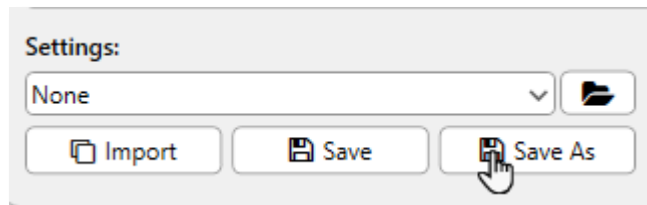
Hands-on Exercise – Saving a Sanitization Configuration

Practice – On your own	
1. Open the SSI example project (ExampleProject.mpp) file.	
2. Open the SSI Schedule Sanitizer by clicking the Schedule Sanitizer button in the Tools/Utilities group in the SSI Analysis Tools Ribbon .	
3. In the Task Items tab, check the options to <i>Clear Baseline Work</i> and <i>Clear Baseline Cost</i> . Then move all of the Text fields into the <i>Items to Clear</i> list by clicking the <i>Add All >></i> button.	
4. In the Resource Items tab, chose the option to <i>Delete Resource Sheet</i> .	

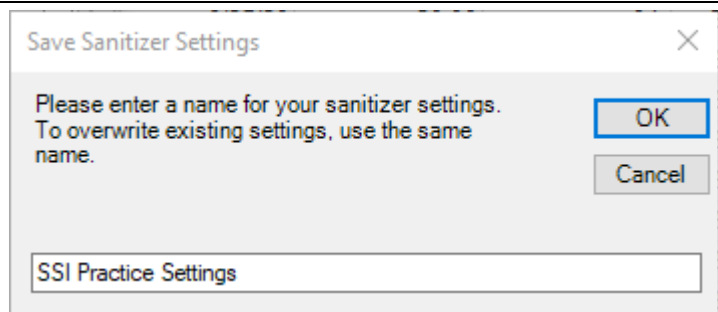
5. In the **Project Items** tab, navigate to the *Custom Properties* tab and check the option to *Delete All Custom Properties*.



6. Click the **Save As** button.



7. Name your Sanitizer Settings "SSi Practice Settings" and click **OK**



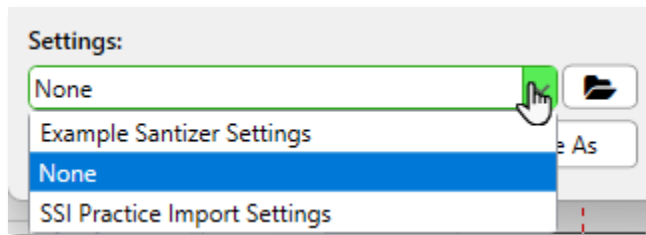
End of Practice Exercise

Importing SSI Sanitizer Settings

Clicking the **Import Settings** button will allow a user to browse to a SSI Schedule Sanitizer settings configuration .json file. Once a valid file is selected, it will be added to the user's list of settings configurations.

Clicking the  button will open the Windows File Explorer at the saved settings configurations directory. In this directory, users can delete or rename any of the saved .json files.

A specific settings configuration can be applied by selecting it from the settings drop down menu. When the SSI Schedule Sanitizer is first opened, the selected settings configuration is always set to **None**.

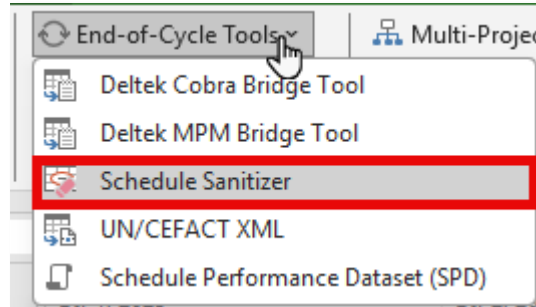


Hands-on Exercise – Importing a Sanitizer Settings Configuration

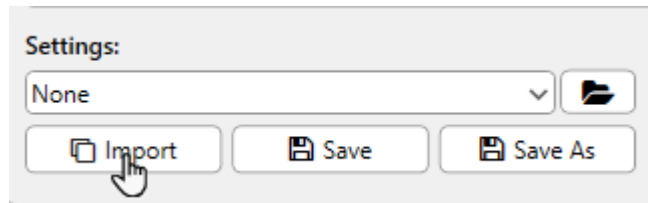
Practice – On your own

1. Download [SSi Practice Import Settings.json](#)

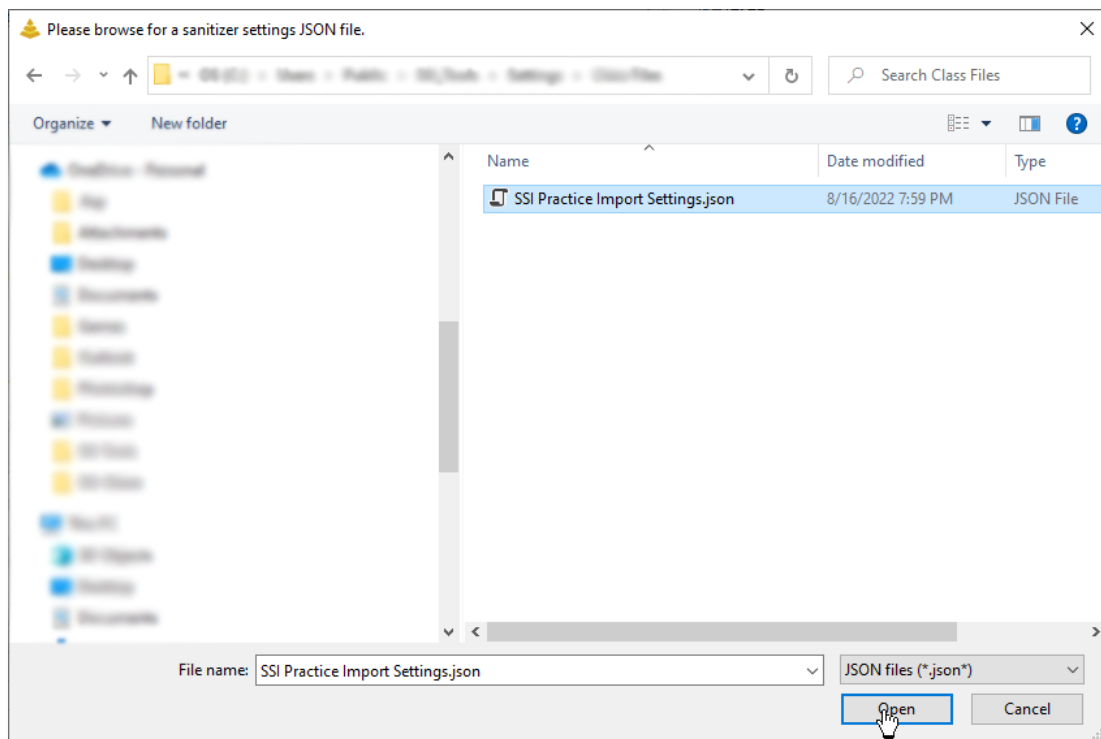
2. Open the **SSi Schedule Sanitizer** by clicking the Schedule Sanitizer button in the **Tools/Utilities** group in the **SSi Analysis Tools Ribbon**



3. Click the **Import Settings** button



4. Use the Windows File Explorer to browse to where you saved the *SSi Practice Import Settings.json* file, then click the *Open* button



End of Practice Exercise

Sanitizing The Schedule

To sanitize the active project file, complete the following steps:

1. Select the desired items to be sanitized in each of the tabs in the **SSI Schedule Sanitizer** form. This can be performed manually or by selecting an existing settings configuration. Even after a settings configuration has been selected, users can change which items are to be sanitized prior to sanitizing the schedule.
2. Choose the desired **Sanitization Option** (Sanitize *all tasks* or *selected tasks*).
3. If desired, save the current sanitization configuration by clicking **Save Current Settings**.
4. Click the **Sanitize Schedule** button.

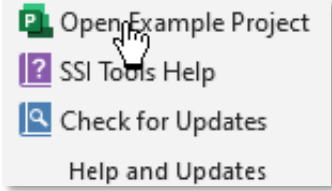
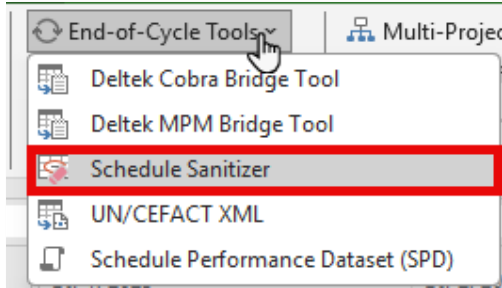
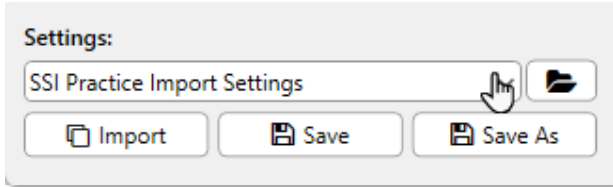
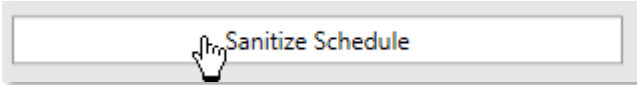
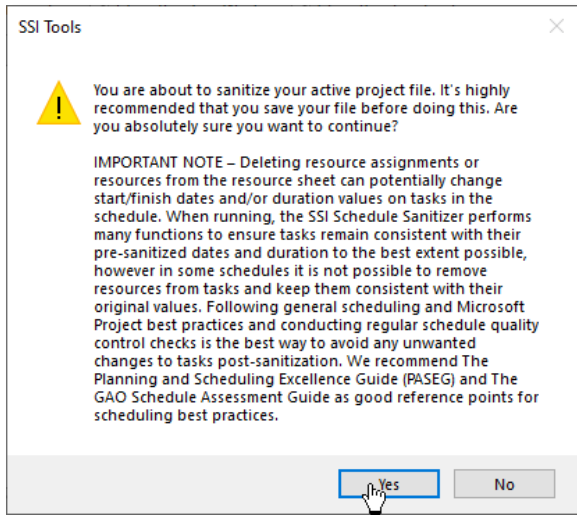
Once the **Sanitize Schedule** button is clicked, a warning will be displayed to the user encouraging them to save a copy of their schedule file prior to sanitization. The user can choose to continue the sanitization process by clicking **Yes** or not to continue by clicking **No**. It is highly recommended that the sanitization is performed on a copy of the project file, not the live file because the sanitization process will remove data from the file. Even if sanitization occurs on a live file, no changes are saved until the user saves the project by selecting **File → Save** or **File → Save As**.

While the sanitization process is running, a progress message and progress bar will be displayed to the user in the center of the SSI Schedule Sanitizer user form.

Once the sanitization process is complete, one of the following messages will be displayed:

- **Sanitization Complete with no issues!** – this message means that the sanitization process completed without any deltas to task start/finish dates in the schedule.
- **Sanitization Complete. Warning...** – this message means that the sanitization process completed but some start/finish dates of tasks in the schedule have changed. If this has occurred, the SSI Schedule Sanitizer will allow the user to create an Excel report of all of the tasks that have deltas to their start/finish dates.
- **Sanitization Failed...** – This message means that an error occurred during the sanitization process. The file may not be sanitized properly, and it is recommended to revert to the pre-sanitized file.

Hands-on Exercise – Sanitizing the Schedule

Practice – On your own	
1. Open the SSI example project (ExampleProject.mpp) file.	
2. Click <i>File</i> → <i>Save As</i> to save a copy of the Example Project as “Example Sanitization Project”.	
3. Open the SSI Schedule Sanitizer by clicking the Schedule Sanitizer button in the Performance and EV group in the End-of-Cycle Tools dropdown menu.	
4. Apply the SSI Practice Settings that you created in the earlier exercise (download from here if needed).	
5. Click the Sanitize Schedule button.	
6. Read the prompt that opens. When ready to proceed with the Sanitization, click the Yes button.	
7. Once the sanitization completes, inspect the project file to ensure data was removed.	
End of Practice Exercise	

Changes After Sanitization Excel Report

In the event task start/finish dates change during the sanitization process, users can create an Excel report outlining the differences. This report includes the following columns:

- Task Unique ID
- Original Start Date
- Current Start Date
- Original Finish Date
- Current Finish Date
- Original Duration
- Current Duration
- Original % Complete
- Current % Complete
- Same Start?
- Same Finish?
- Same Duration?
- Same % Complete?

The SSI Schedule Sanitizer will automatically perform the analysis to show users what values are different than the pre-sanitization values in the last four columns of the report. As stated before, the better a Project file follows scheduling and MS Project best practices, the less likely tasks are to change during the sanitization process. Here are some of the most common reasons tasks would change during the sanitization process:

- Split tasks
- Tasks with elapsed durations
- Tasks with resources assignments that have a different period of performance than the tasks' period of performance.
- Dependencies on Summaries
- Resources on Summaries