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SSI Time Scaled Values Tool**Overview**

Schedules that include resource assignments to its tasks add another dimension to the analysis that can be performed on the project. Since tasks are performed over time and since the period of performance for many tasks overlap, it is often necessary to see project data from a time scaled perspective of resource usage. The SSI Time Scaled Values tool is built to help users understand the resource usage of their project across time and offers many customization options to create any kind of time phased resource analysis table or chart from the data that exists in the Project file.

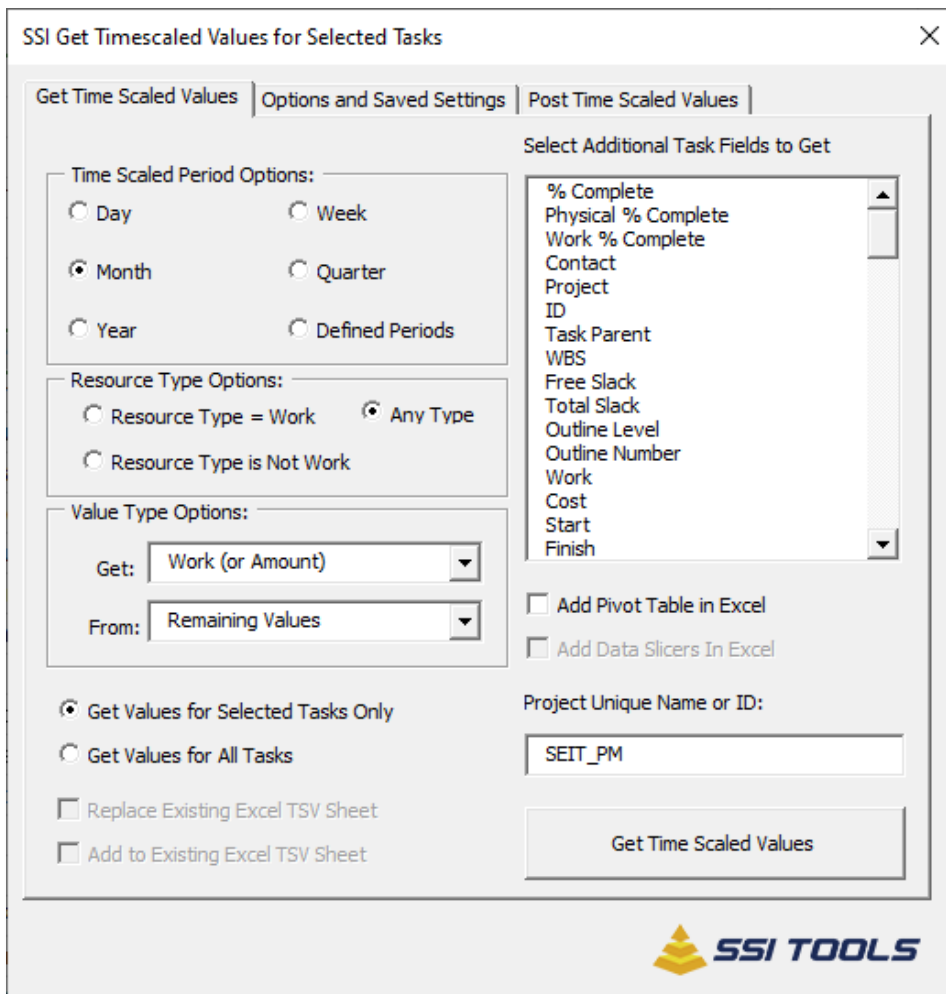
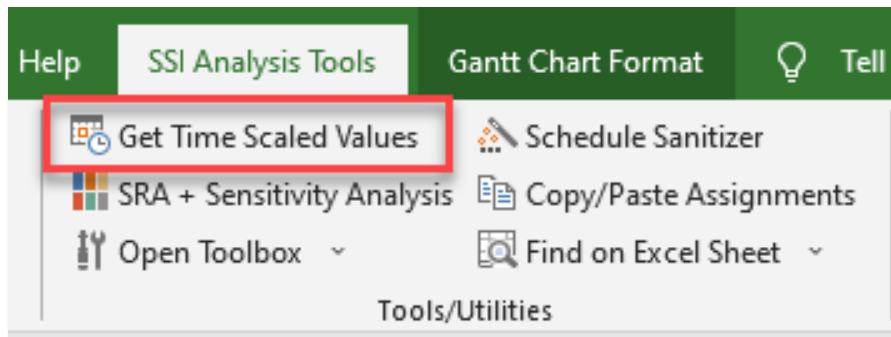
Where to Get Help

<https://ssitools.com/ssi-time-scaled-values/>

https://ssitools.com/helpandsupport/ssianalysishelp/ssi_get_timescaled_values_tool.htm

Getting Started

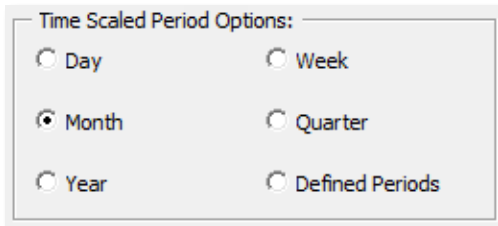
To open the SSI Time Scaled Values Tool, click *Get Time Scaled Values* button in the *Tools/Utilities* group of the *SSI Analysis Tools* tab in *Microsoft Project*.

The image shows the 'SSI Get Timescaled Values for Selected Tasks' dialog box. It has three tabs: 'Get Time Scaled Values' (selected), 'Options and Saved Settings', and 'Post Time Scaled Values'. The 'Get Time Scaled Values' tab contains several sections: 'Time Scaled Period Options' with radio buttons for Day, Week, Month (selected), Quarter, Year, and Defined Periods; 'Resource Type Options' with radio buttons for Resource Type = Work, Any Type (selected), and Resource Type is Not Work; 'Value Type Options' with dropdowns for 'Get:' (Work (or Amount)) and 'From:' (Remaining Values); a list of 'Select Additional Task Fields to Get' including % Complete, Physical % Complete, Work % Complete, Contact, Project, ID, Task Parent, WBS, Free Slack, Total Slack, Outline Level, Outline Number, Work, Cost, Start, and Finish; checkboxes for 'Add Pivot Table in Excel' and 'Add Data Slicers In Excel'; radio buttons for 'Get Values for Selected Tasks Only' (selected) and 'Get Values for All Tasks'; checkboxes for 'Replace Existing Excel TSV Sheet' and 'Add to Existing Excel TSV Sheet'; and a text field for 'Project Unique Name or ID:' containing 'SEIT_PM'. A 'Get Time Scaled Values' button is at the bottom right. The SSI TOOLS logo is at the bottom center.

The Get Time Scaled Values Tab

The *Get Time Scaled Values* tab is where majority of the options for the time phased analysis exist. From this tab, you can select the time phasing interval, resource type, value type, and any additional fields from Project tasks to be added to the output.

Time Scaled Period Options



Time Scaled Period Options:

☐ Day ☐ Week

☒ Month ☐ Quarter

☐ Year ☐ Defined Periods

The *Time Scaled Period Options* allow the user to select what the time phasing interval will be when the *Time Scaled Values Report* is created. The following options are available:

- **Day** – time phasing will be broken down by each day in the project.
- **Week** – time phasing will be broken down by each week in the project.
- **Month** – time phasing will be broken down by each month in the project.
- **Quarter** – time phasing will be broken down by each *calendar** quarter in the project.
* this is the regular quarter according to the Gregorian calendar, not the government fiscal calendar.
- **Year** – time phasing will be broken down by each year in the project.
- **Defined Periods** – time phasing will be broken down by intervals defined by the user.

Creating Defined Periods

Defined Periods are intervals of time that do not correspond to any standard time period and are defined by the user. These periods can be anything but are most often used to represent an organization's fiscal calendar.

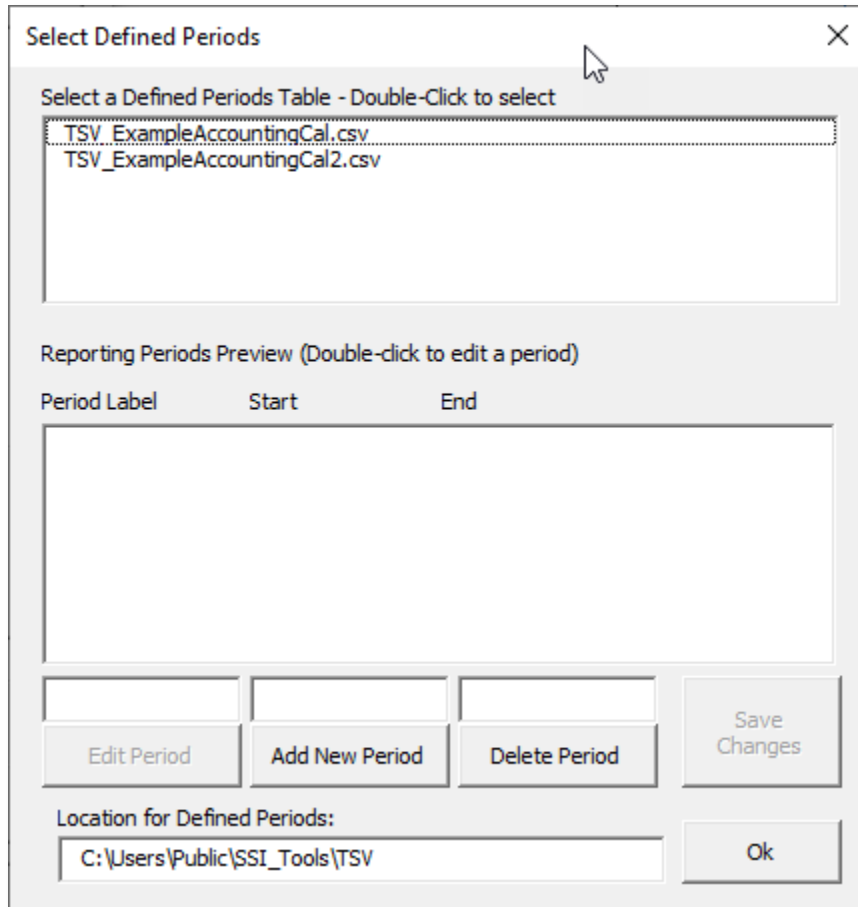
The easiest way to create your own defined periods in *Excel*. In an Excel worksheet, Column A will represent the **Period Label**, column B is the **Start date** of the period and column C is the **End date** of the period. A Period's **start date** must be the next day after the prior period **end date**.

	A	B	C
1	2019-01	12/29/2018	2/1/2019
2	2019-02	2/2/2019	3/1/2019
3	2019-03	3/2/2019	3/29/2019
4	2019-04	3/30/2019	5/3/2019
5	2019-05	5/4/2019	5/31/2019
6	2019-06	6/1/2019	6/28/2019
7	2019-07	6/29/2019	8/2/2019
8	2019-08	8/3/2019	8/30/2019
9	2019-09	8/31/2019	9/27/2019
10	2019-10	9/28/2019	11/1/2019
11	2019-11	11/2/2019	11/29/2019
12	2019-12	11/30/2019	12/27/2019

When finished creating the defined periods, the file **MUST** be saved as a .csv file and the file name **MUST** be prefixed with "TSV_". If these conventions are not followed, SSI will not be able to recognize the file as a defined periods file. Save the file in the TSV folder of the SSI Tools folder (most likely C:\Users\Public\SSI_Tools\TSV). This is the default location the Time Scaled Values tool will look to when the Defined Periods option is selected.

Selecting Defined Periods

When the *Defined Periods* option is selected from the *Time Scaled Period Options*, a separate dialog will open prompting the user to select which defined periods file they would like to use for the Time Scaled Values report.



Select Defined Periods

Select a Defined Periods Table - Double-Click to select

- TSV_ExampleAccountingCal.csv
- TSV_ExampleAccountingCal2.csv

Reporting Periods Preview (Double-click to edit a period)

Period Label	Start	End
--------------	-------	-----

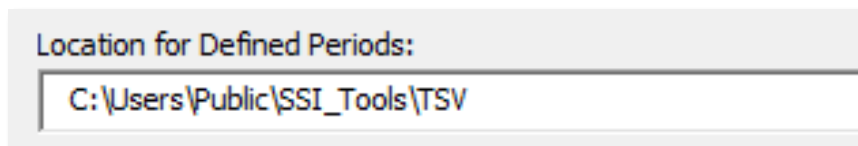
Edit Period Add New Period Delete Period Save Changes

Location for Defined Periods:

C:\Users\Public\SSI_Tools\TSV

Ok

The files loaded in the top list on the form will be the .csv files prefixed with TSV_ in the file name that are in the folder selected in the bottom textbox:

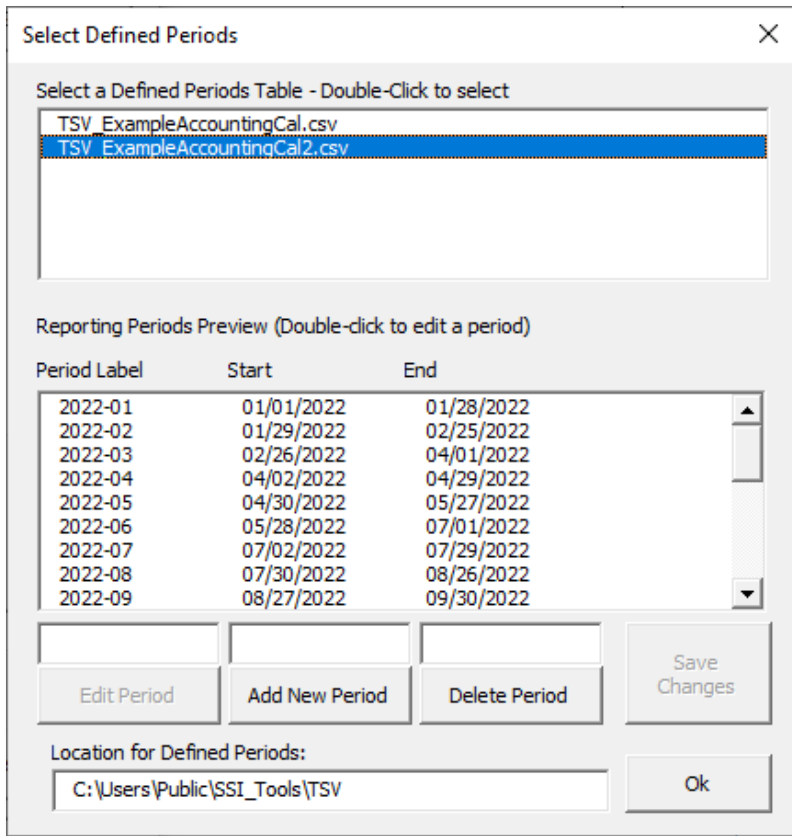


Location for Defined Periods:

C:\Users\Public\SSI_Tools\TSV

To change this location, double click the textbox and browse to whatever folder is desired.

To select a file to be used, double click any one of the files listed in the top list on the *Select a Defined Periods Table* window.



Select Defined Periods

Select a Defined Periods Table - Double-Click to select

TSV_ExampleAccountingCal.csv
TSV_ExampleAccountingCal2.csv

Reporting Periods Preview (Double-click to edit a period)

Period Label	Start	End
2022-01	01/01/2022	01/28/2022
2022-02	01/29/2022	02/25/2022
2022-03	02/26/2022	04/01/2022
2022-04	04/02/2022	04/29/2022
2022-05	04/30/2022	05/27/2022
2022-06	05/28/2022	07/01/2022
2022-07	07/02/2022	07/29/2022
2022-08	07/30/2022	08/26/2022
2022-09	08/27/2022	09/30/2022

Location for Defined Periods:

C:\Users\Public\SSi_Tools\TSV

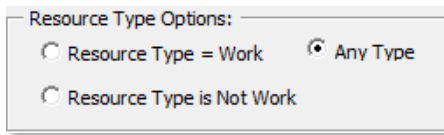
Upon making a selection, the defined period information will be displayed in the lower list.

Period Label	Start	End
2022-01	01/01/2022	01/28/2022
2022-02	01/29/2022	02/25/2022
2022-03	02/26/2022	04/01/2022
2022-04	04/02/2022	04/29/2022
2022-05	04/30/2022	05/27/2022
2022-06	05/28/2022	07/01/2022
2022-07	07/02/2022	07/29/2022
2022-08	07/30/2022	08/26/2022
2022-09	08/27/2022	09/30/2022

These periods can be adjusted from this form by using the controls right below the list.

2022-01	01/01/2022	01/28/2022	Save Changes
Edit Period	Add New Period	Delete Period	

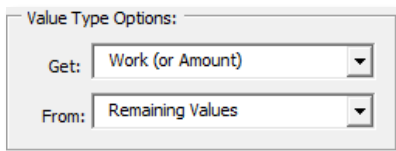
Resource Type Options

A dialog box titled "Resource Type Options:" containing three radio button options. The first option is "Resource Type = Work", the second is "Any Type" (which is selected), and the third is "Resource Type is Not Work".

The resource type options allow the user to select what type of resource they would like to include on the time phased values report. The following options are available.

- **Resource Type = Work** – selecting this option will tell the tool to only include labor resources in the time phased values report.
- **Resource Type Is Not Work** – selecting this option will tell the tool to only include non-labor resources in the time phased values report.
- **Any Type** – selecting this option will tell the tool to include all resource types in the time phased values report.

Value Type Options

A dialog box titled "Value Type Options:" containing two drop-down menus. The "Get:" menu is set to "Work (or Amount)" and the "From:" menu is set to "Remaining Values".

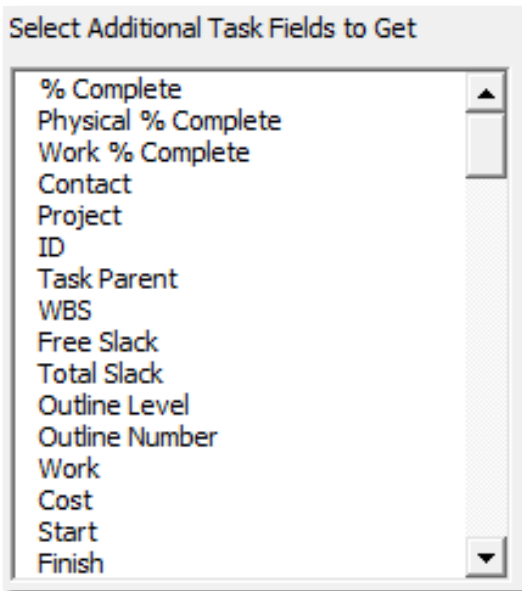
The drop-down menus in the *Value Type Options* group allow users to select what unit data type they are getting from the resources and from what value.

In the *Get* drop-down, the following options are available:

- **Work (or Amount)** – selecting this option will tell the tool to get the *Work* or *Amount* value for each time period.
- **Cost** – selecting this option will tell the tool to get the *Cost* value for each time period.
- **Work & Cost** – selecting this option will tell the tool to get the *Work* AND *Cost* values for each time period.

In the *From* drop-down, the following options are available:

- **Baseline Values** – selecting this option will tell the tool to get the *baseline* work or cost values from the resource assignments.
- **Remaining Values** – selecting this option will tell the tool to get the *remaining* work or cost values from the resource assignments.
- **Baseline & Remaining Values** – selecting this option will tell the tool to get the *baseline* AND *remaining* work or cost values from the resource assignments.
- **Total Values** – selecting this option will tell the tool to get the *total* work or cost values from the resource assignments. *Total* work or cost is the sum of the remaining and what Microsoft project thinks the actuals are on the resource assignments. SSI does not recommend using this option as most organizations do not load actuals into Microsoft Project.

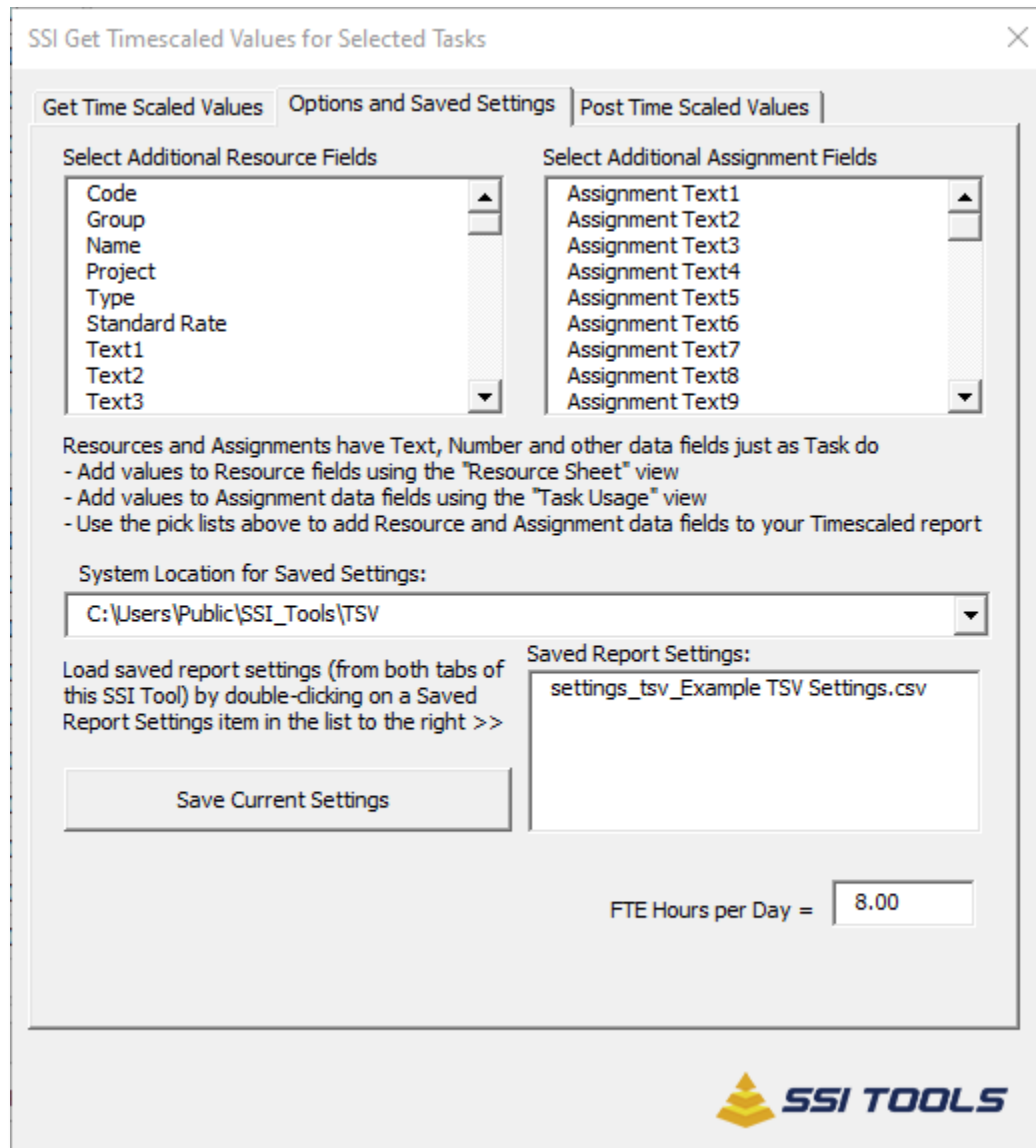
Additional Task Fields to Get

Users can select additional task fields to add to the Time Scaled Values report. This is useful because it enables users to be able to filter, sort, group, etc. their data by any task attribute in the Excel output that is produced by the Time Scaled Values Tool.

To select additional task field, simply find a field you would like to add to the report in the list and select it. A user can select multiple fields by holding the CTRL key while making selections.

The Options and Saved Settings Tab

From the options and saved settings, users can select additional fields to add to their Time Scaled Values report from either the resource sheet or the assignment custom fields. Users can also save their settings to be reapplied later and define how many hours make up a single Full time Equivalent (FTE) head from this tab.



SSI Get Timescaled Values for Selected Tasks

Get Time Scaled Values | **Options and Saved Settings** | Post Time Scaled Values

Select Additional Resource Fields

- Code
- Group
- Name
- Project
- Type
- Standard Rate
- Text1
- Text2
- Text3

Select Additional Assignment Fields

- Assignment Text1
- Assignment Text2
- Assignment Text3
- Assignment Text4
- Assignment Text5
- Assignment Text6
- Assignment Text7
- Assignment Text8
- Assignment Text9

Resources and Assignments have Text, Number and other data fields just as Task do

- Add values to Resource fields using the "Resource Sheet" view
- Add values to Assignment data fields using the "Task Usage" view
- Use the pick lists above to add Resource and Assignment data fields to your Timescaled report

System Location for Saved Settings:

C:\Users\Public\SSI_Tools\TSV

Load saved report settings (from both tabs of this SSI Tool) by double-clicking on a Saved Report Settings item in the list to the right >>

Save Current Settings

Saved Report Settings:

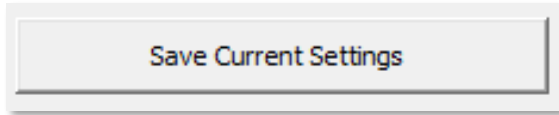
- settings_tsv_Example TSV Settings.csv

FTE Hours per Day = 8.00

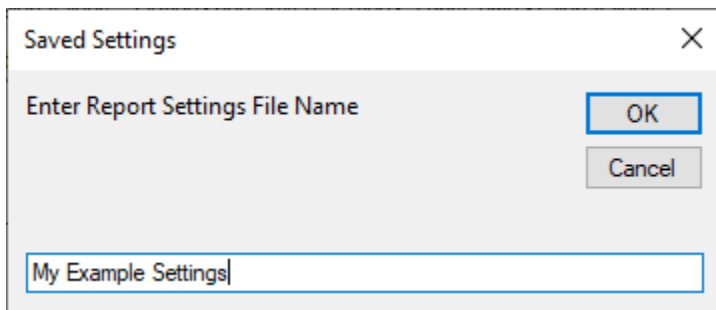


Saving Settings

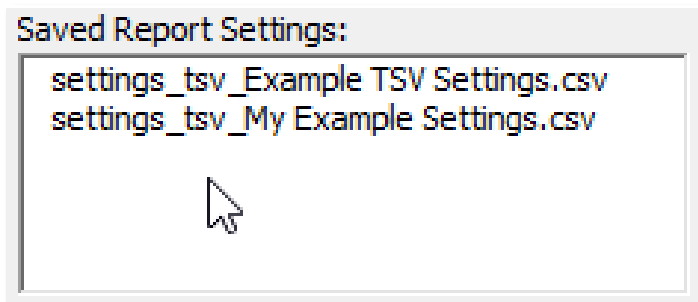
To save current settings for future use, click the *Save Current Settings* button



A dialog will open prompting the user to enter a name for the settings configuration. Type whatever name you would like for the settings.



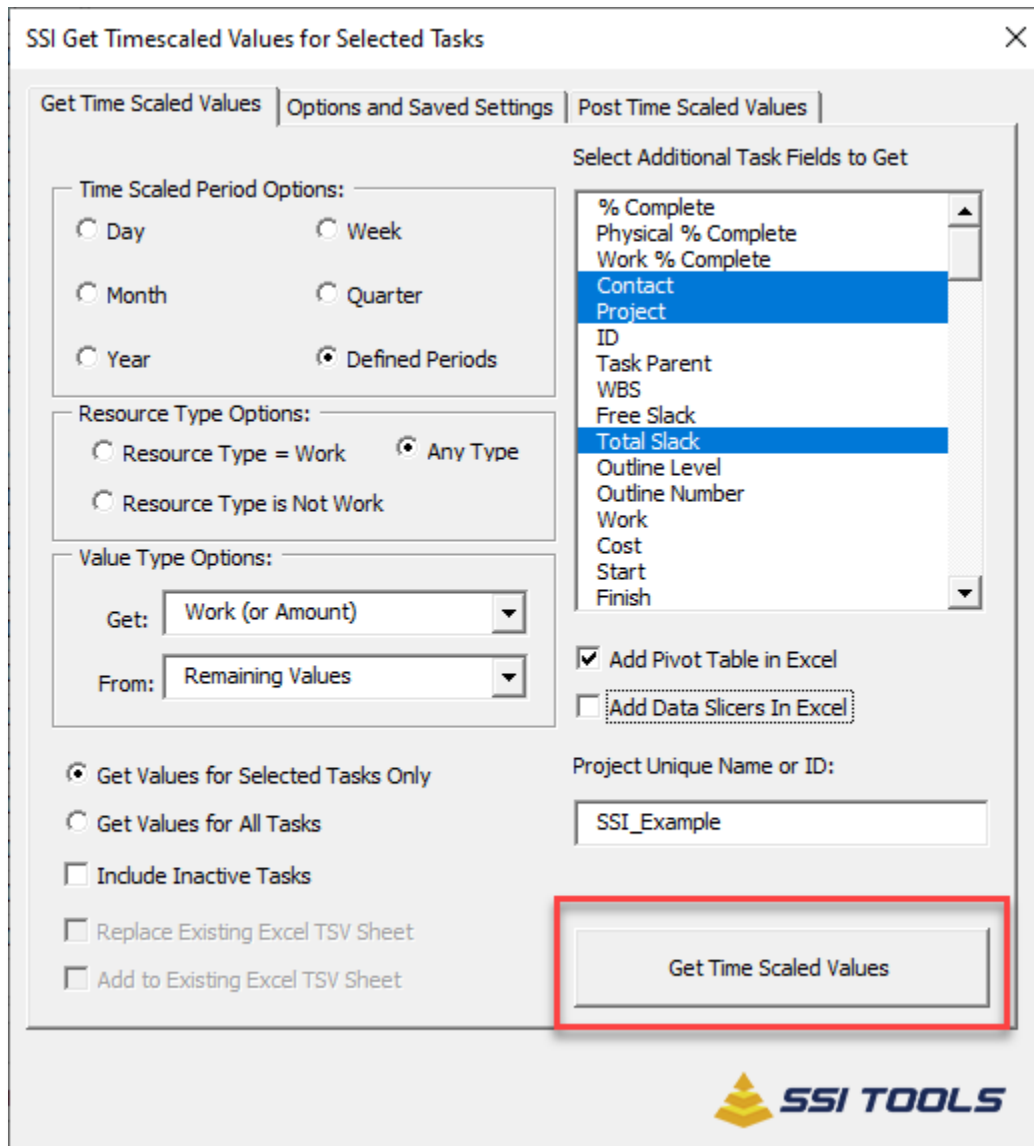
When ready, click the *OK* button. The names of saved settings configurations will appear in the *Saved Report Settings* list.



These settings can be reapplied at any time in the future when using the *Time Scaled Values* tool.

Running the Time Scaled Values Report

Once all selections have been made, the report is ready to be generated. To generate the Time Scaled Values report, click the big **Get Time Scaled Values** button on the *Get Time Scaled Values* tab.



SSI Get Timescaled Values for Selected Tasks

Get Time Scaled Values | Options and Saved Settings | Post Time Scaled Values

Time Scaled Period Options:

☐ Day ☐ Week

☐ Month ☐ Quarter

☐ Year ☒ Defined Periods

Resource Type Options:

☐ Resource Type = Work ☒ Any Type

☐ Resource Type is Not Work

Value Type Options:

Get:

From:

☒ Get Values for Selected Tasks Only

☐ Get Values for All Tasks

☐ Include Inactive Tasks

☐ Replace Existing Excel TSV Sheet

☐ Add to Existing Excel TSV Sheet

Select Additional Task Fields to Get

- % Complete
- Physical % Complete
- Work % Complete
- Contact
- Project
- ID
- Task Parent
- WBS
- Free Slack
- Total Slack
- Outline Level
- Outline Number
- Work
- Cost
- Start
- Finish

☒ Add Pivot Table in Excel

☐ Add Data Slicers In Excel

Project Unique Name or ID:

Get Time Scaled Values



Report Examples

Time Scaled resource analysis slices the project into time periods and displays them as columns in an Excel report. Resource names from the Resource table are shown in rows along with their associated task and resource information if requested. For example, if a user requests a pivot table of Monthly values for each Resource in a project the report output would look like this:

Resources by Month

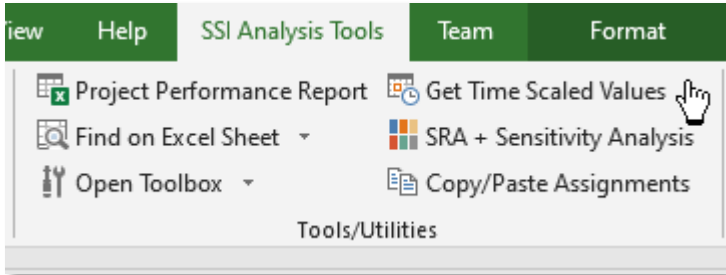
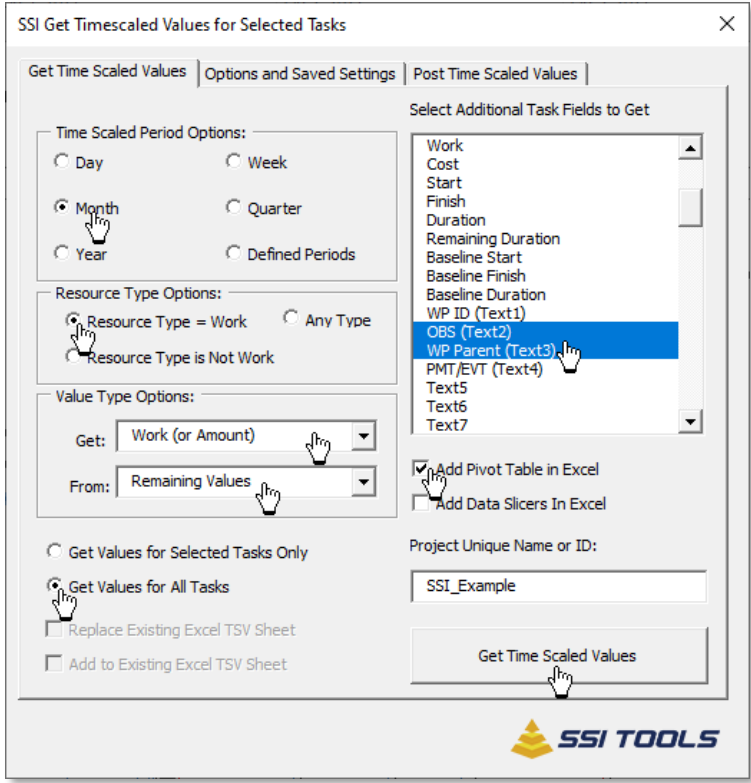
Sum of Hrs or Amt	Period End					
Res Name	07/31/14	08/31/14	09/30/14	10/31/14	11/30/14	12/31/14
HW Engineer	24.0	8.0		8.0	8.0	
Material	380.0	120.0				
ODC	380.0	120.0				
PM Office	8.0	8.0		8.0	8.0	
Production Lead	20.0	28.0	40.0	216.0	144.0	40.0
Production Support				104.0	116.0	

If the user adds text fields from Microsoft Project's Task or Resource table, the pivot table can include those values as row groupings.

Resources by OBS (a custom text field in the example project) by Month

Sum of Hrs or Amt	Period End								
Task:OBS	Res Name	05/31/14	06/30/14	07/31/14	08/31/14	09/30/14	10/31/14	11/30/14	12/31/14
Deployment							376.0	540.0	40.0
Design	HW Engineer	58.7	141.3	24.0					
	PM Office		80.0	8.0					
	Production Lead		120.0	8.0					
	Program Manager		24.0	8.0					
	Security Engineer		8.0	8.0					
	SW Engineer		104.0	8.0					
	Systems Engineer		64.0	68.0					
	Test Engineer			8.0					
Design Total		58.7	541.3	140.0					
Dev		60.0	50.4	1321.6	652.0	240.0	136.0		
Sys Eng		133.3							
Grand Total		252.0	591.7	1461.6	652.0	240.0	512.0	540.0	40.0

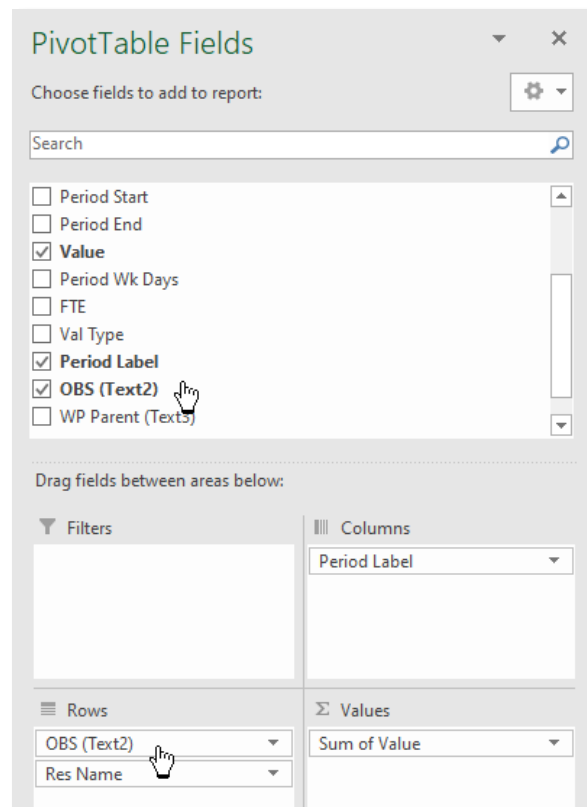
Class Exercise – Get Time Scaled Values by Month

Step	Description / Image View
	Open the Example Project* from the Help and Updates group on the SSi Analysis Tools menu in Microsoft Project. *If needed, download the Example Project at: Example Project for Exercises
1. Click Get Time Scaled Values from the Tools/Utilities group on the SSi Analysis Tools menu.	
2. Select Time Scaled Values from the Toolbox. Select Options and Run the Report - Select all the options shown to the right – look at the pointing fingers - Press Get Time Scaled Values	

4. View the Report as an Excel Pivot Table – Grouped by Resource Name by Month as shown below:

Sum of Value	Column Labels								
Row Labels	2019-04	2019-05	2019-06	2019-07	2019-08	2019-09	2019-10	2019-11	Grand Total
HW Engineer	52.5	152.0	24.0	8.0		8.0		8.0	252.5
PM Office		80.0	8.0	8.0		8.0		8.0	112.0
Production Lead		120.0	8.0	40.0	40.0	176.0	184.0	40.0	608.0
Production Support						72.0	148.0		220.0
Program Manager	8.0	24.0	8.0	8.0		8.0		8.0	64.0
Security Engineer	24.0	8.0	8.0	8.0	80.0	8.0	40.0	8.0	184.0
SW Engineer	8.0	104.0	36.8	27.2		8.0		8.0	192.0
Systems Engineer	107.8	64.0	68.0	8.0		8.0		8.0	263.8
Test Engineer	46.8	38.8	60.8	126.4	72.0	56.0	128.0		528.8
Test Tech	15.0	19.4	47.2	70.4	72.0	48.0	128.0		400.0
Grand Total	262.1	610.2	268.8	304.0	264.0	400.0	628.0	88.0	2825.1

5. Add **OBS** to the Pivot table's hierarchy
- Click **OBS (Text2)** from the list of **Pivot Table Fields** and drag it to the **ROWS** section of the Pivot table. Place it before **Res Name** to group by OBS first and Resource Name second



PivotTable Fields

Choose fields to add to report:

Search

☐ Period Start

☐ Period End

☒ Value

☐ Period Wk Days

☐ FTE

☐ Val Type

☒ Period Label

☒ OBS (Text2)

☐ WP Parent (Text3)

Drag fields between areas below:

Filters

Columns

Period Label

Rows

OBS (Text2)

Res Name

Values

Sum of Value

6. View the Report as an Excel Pivot Table – Grouped by OBS, then Resource Name by Month as shown below:

Sum of Value	Column Labels v								
Row Labels v	2019-04	2019-05	2019-06	2019-07	2019-08	2019-09	2019-10	2019-11	Grand Total
- Deployment						240.0	628.0	88.0	956
HW Engineer								8.0	8
PM Office								8.0	8
Production Lead						104.0	184.0	40.0	328
Production Support						72.0	148.0		220
Program Manager								8.0	8
Security Engineer							40.0	8.0	48
SW Engineer								8.0	8
Systems Engineer								8.0	8
Test Engineer						32.0	128.0		160
Test Tech						32.0	128.0		160
+ Design	44.5	552.0	140.0						736
+ Dev	45.0	58.2	128.8	304.0	264.0	160.0			960
+ Sys Eng	172.6								172
Grand Total	262.1	610.2	268.8	304.0	264.0	400.0	628.0	88.0	2825