

DecisionEdge Suite for Microsoft Project

Getting Started Guide

© 2007 DecisionEdge, Inc. All rights reserved. Unless otherwise noted, this software is the property of DecisionEdge, Inc. (DecisionEdge) or its licensors and is entitled to copyright protection. Any reproduction in whole or in part is strictly prohibited.

While reasonable efforts have been made to ensure the accuracy of this document, DecisionEdge assumes no liability resulting from any omission or inaccuracies in this document or from use of the information obtained herein. DecisionEdge reserves the right to make changes to any products described herein to improve reliability, function, or design, and reserves the right to revise this document and to make changes from time to time in content hereof with no obligation to notify any person of revisions or changes. DecisionEdge does not assume any liability arising out of the application or use of any product described herein; neither does it convey license under its patent rights or the rights of others.

Please send your comments to:

DecisionEdge, Inc.
299 West Hillcrest Drive, Suite 210
Thousand Oaks, CA 91360
Telephone: +1 (610) 665-4002
FAX: +1 (610) 665-4003
Email: info@decisionedge.com
Web: <http://www.decisionedge.com>

Computer Software Copyrights: The DecisionEdge software products described in this document may not be copied, reproduced, modified, or distributed in any manner without the express written permission of DecisionEdge.

Use and Disclosure Restrictions: The software described in this document is the property of DecisionEdge. It is furnished under a license agreement and may be used and/or disclosed only in accordance with the terms of the agreement.

U.S. Government Restricted Rights: If the Software is acquired for or on behalf of the United States of America, its agencies and/or instrumentalities ("U.S. Government"), it is provided with RESTRICTED RIGHTS. The Software and accompanying documentation are "commercial computer software" and "commercial computer software documentation," respectively, pursuant to 48 C.F.R. 12.212 and 227.7202, and "restricted computer software" pursuant to 48 C.F.R. 52.227-19(a), as applicable. Use, modification, reproduction, release, performance, display or disclosure of the Software and accompanying documentation by the U.S. Government are subject to restrictions as set forth in this Agreement and pursuant to 48 C.F.R. 12.212, 52.227-14 (Alternate III), 52.227-19, 227.7202, and 1852.227-86, as applicable.

Trademarks: DecisionEdge is a trademark or registered trademark of DecisionEdge, Inc., in the United States and/or in other countries. All other trademarks mentioned herein are the property of their respective owners.

Table of Contents

Preface	iv
What is DecisionEdge Suite for Microsoft Project?	v
Licensing	vi
Hardware and Software Requirements	vi
Using DecisionEdge for Microsoft Project in Your Organization	vi
DecisionEdge for Microsoft Project Documentation	vii
Where to Get Support.....	vii
DecisionEdge Suite for Microsoft Project Setup	1
Installing DecisionEdge Suite for Microsoft Project.....	2
Licensing DecisionEdge Suite for Microsoft Project.....	6
Opening a Chart or Report.....	9
Index	10

Preface

In this preface:

**What is DecisionEdge Suite
for Microsoft Project?**

Licensing

Hardware and Software Requirements

**Using DecisionEdge for Microsoft Project
in Your Organization**

**DecisionEdge Suite for Microsoft Project
Documentation**

Where to Get Support

DecisionEdge, Inc. is a leading provider of business intelligence software designed specifically for project managers.

By adding DecisionEdge reporting and graphics software to existing project management applications such as Microsoft Office Project, managers will have an enhanced ability to understand and communicate important business trends and all stakeholders will have the clear information they need for better results.

From managers using embedded graphics in project management applications to stakeholders viewing live, interactive graphics and reports through a portal, DecisionEdge helps everyone make better business decisions.

This preface provides overview information to help you get started with this DecisionEdge product.

What is DecisionEdge Suite for Microsoft Project?

DecisionEdge Suite for Microsoft Project provides the charts and reports managers need to understand and share key information about their projects. By clicking a toolbar button in Microsoft Office Project 2007, managers can quickly access over 100 graphics and reports that help them:

- Plan resource allocation
- Keep stakeholders informed
- Combine and compare projects
- Track project status
- Measure project performance using earned value

DecisionEdge comes with charts and reports that help managers better understand key information about tasks, resources, costs, earned value, and overall project performance. They can view and customize any of these by filtering data, changing colors, adding and moving logos, and making other changes. They will also keep the whole team informed by sharing project snapshots in standard file formats such as bitmap (.BMP), JPEG (.JPG), Acrobat (.PDF)*, and TIFF, or by sending them directly to a printer or plotter. They can also export chart and report data to CSV and Microsoft Office Excel for further analysis.

DecisionEdge is fully compatible with the latest Microsoft products and technologies, including Microsoft Office Project 2007 and Microsoft Windows Vista.

With DecisionEdge, managers can better:

- **Understand** – Choose from the many bundled charts and reports for managing resources, tracking costs, combining and comparing projects, measuring earned value, and monitoring schedule status.
- **Communicate** – Share project snapshots with full support for common graphic file formats, spreadsheet formats, and a wide range of printers and plotters
- **Control** – Filter, scroll, and drill-down to see trends and make earlier decisions
- **Interact** – Not just pretty pictures, DecisionEdge is an interactive portal into live business data
- **Customize** – Change colors and styles to make graphics look just the way you want them
- **Create** – With DecisionEdge Designer, developers can create and share completely new charts with all DecisionEdge users

By using **DecisionEdge Designer**, organizations can also avoid manual workarounds with custom charts and reports designed for specific visibility requirements. DecisionEdge consultants are available to help with custom chart and report design efforts.

Licensing

DecisionEdge Suite for Microsoft Project installs as a time-limited evaluation. To obtain a permanent license, you must purchase a full-use license directly from DecisionEdge:

After purchasing a license, you will receive a Registration Number that identifies and registers your copy of DecisionEdge. Installation of the license is done after the initial installation (See the licensing instructions below).

Hardware and Software Requirements

DecisionEdge for Microsoft Project

Software:

- O/S: Windows 2000, Windows XP, or Windows Vista. Microsoft .NET 2.0 Framework (or higher).
- *Microsoft Project*: Microsoft Office Project 2002 or higher. Fully compatible with Microsoft Office Project 2007.

Hardware:

- 20MB hard drive for each client
- 512 MB of RAM or higher recommended
- Super VGA (SVGA) 256-color or higher recommended
- Two gigahertz (GHz) processor or higher recommended

Using DecisionEdge for Microsoft Project in Your Organization

DecisionEdge for Microsoft Project is designed to give project managers quick access to charts and reports via a new toolbar button in Microsoft Project.

Companies with specific graphical reporting requirements will want **DecisionEdge Designer**. Developers and technical consultants can use this sophisticated toolkit to create completely new Microsoft Project graphics that can be shared with all DecisionEdge users. DecisionEdge Designer provides unlimited possibilities for showing and formatting data with different chart types, computed elements, and interactive dashboards.

DecisionEdge consultants are available to help with custom chart and report design efforts.

Learn more about DecisionEdge Designer:

http://www.decisionedge.com/microsoft_designer.html

DecisionEdge for Microsoft Project Documentation

The DecisionEdge documentation consists of two main components:

- This *DecisionEdge Suite for Microsoft Project Getting Started Guide* explains how to install DecisionEdge Suite for Microsoft Project.
- *DecisionEdge Suite for Microsoft Project Online Help* explains how to use all software features. For example, the online help describes how to customize a chart with a corporate logo.

You are now reading the Getting Started Guide. You can access the Online Help by clicking the Help button on the DecisionEdge chart selection dialog.

Where to Get Support

Customer success is a priority at DecisionEdge. We want customers to quickly and easily get started and remain successful with DecisionEdge software, and we have created extensive materials to help them do just that.

Please review the Support section of the DecisionEdge website for the information and answers that will help you get the most out of DecisionEdge software products:

<http://www.decisionedge.com/support>

DecisionEdge Suite for Microsoft Project Setup

In this chapter:

Installing DecisionEdge Suite for Microsoft Project

Licensing DecisionEdge Suite for Microsoft Project

Opening a Chart or Report

The setup of DecisionEdge Suite for Microsoft Project consists of installing the application, registering the license (if you have purchased one), and then selecting a chart or report and the active project.

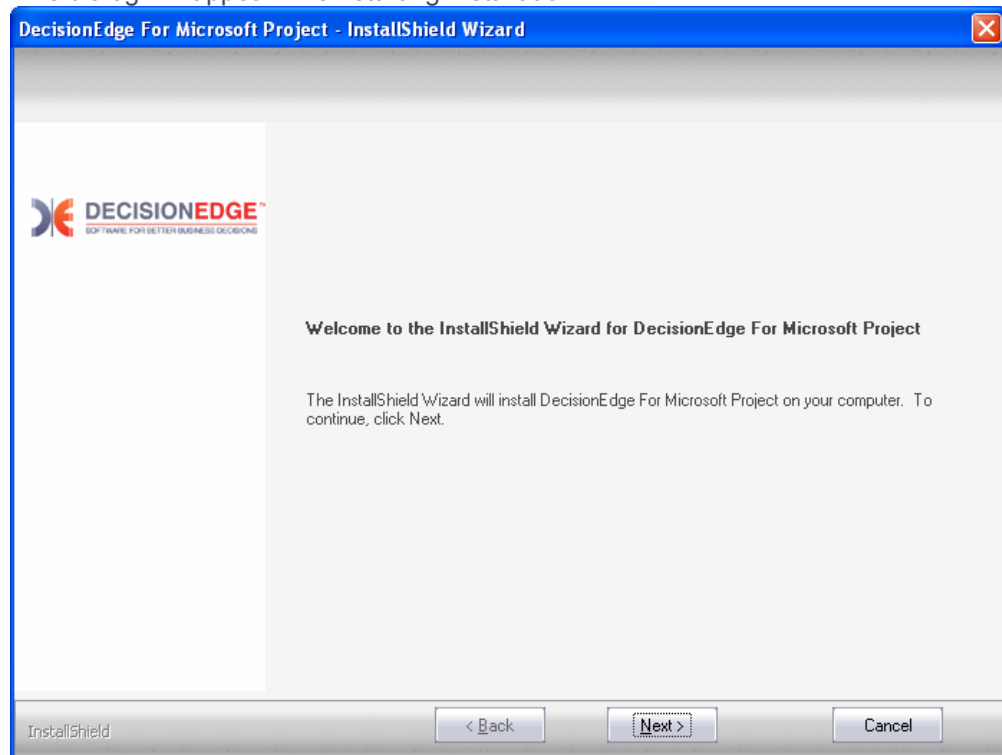
Installing DecisionEdge Suite for Microsoft Project

If you have a previous version of DecisionEdge installed, use “Add or Remove Programs” in the Windows Control Panel to uninstall the existing version before you begin.

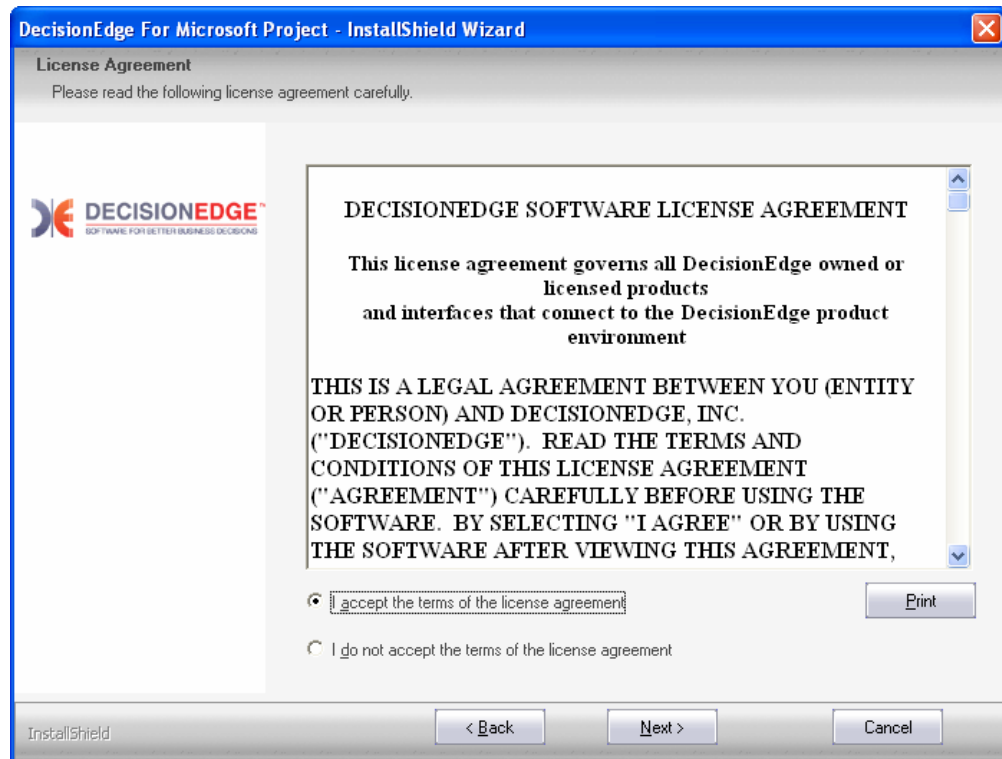
Good News: If you already have a DecisionEdge product installed, your licensing and database connection information will be preserved when you uninstall the current version.

To Install DecisionEdge Suite for Microsoft Project

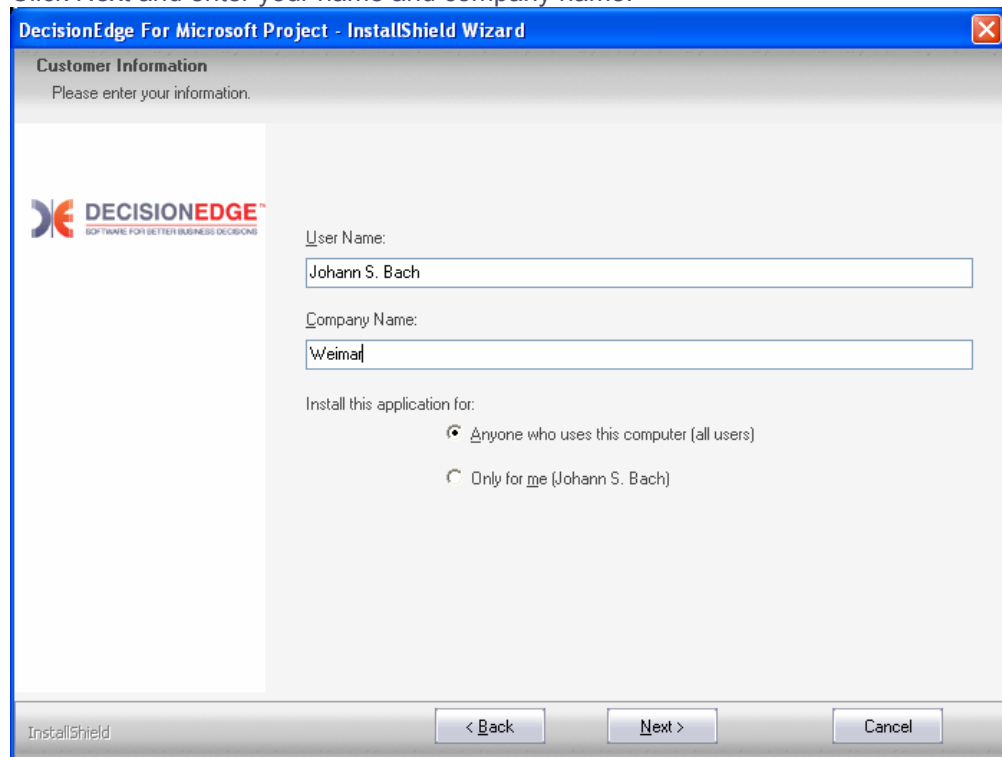
1. Exit any open programs before you install DecisionEdge (especially Microsoft Project).
2. Run Setup from the CD or download the **DecisionChartsForMSP.exe** file to your computer. Click Run if you get a download Security Warning dialog. The installation process will begin after the download is complete.
3. This dialog will appear when starting Installation:



4. Click Next and then review the licensing agreement. If you agree to the license terms, select “I Agree” to accept it and then click Next.

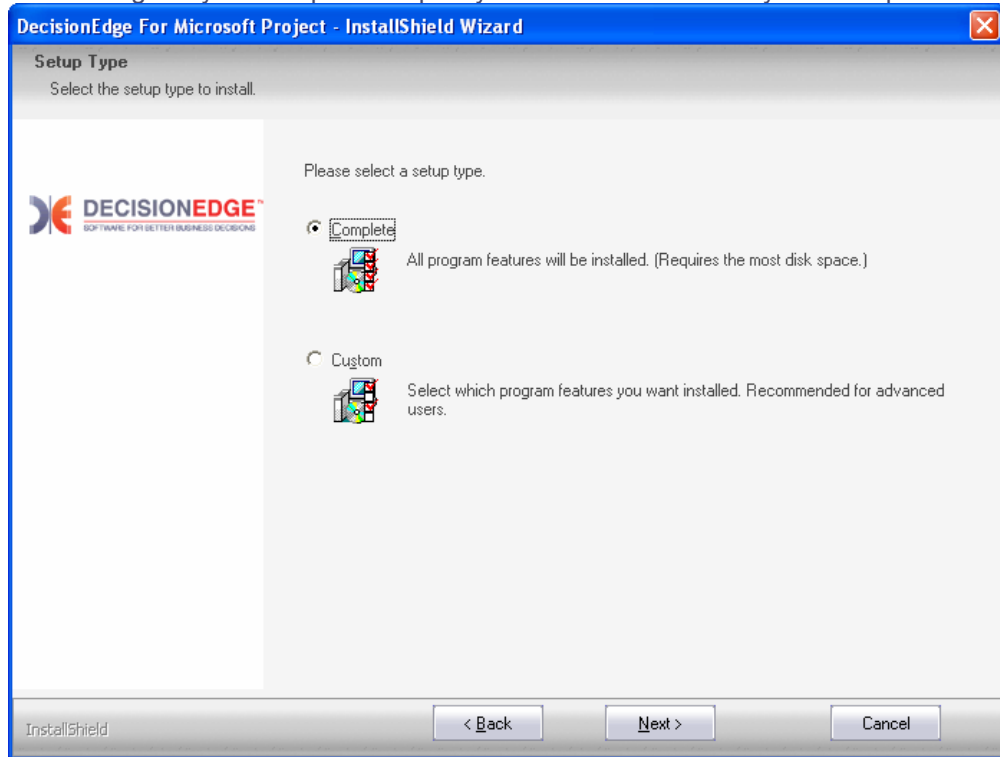


5. Click Next and enter your name and company name:

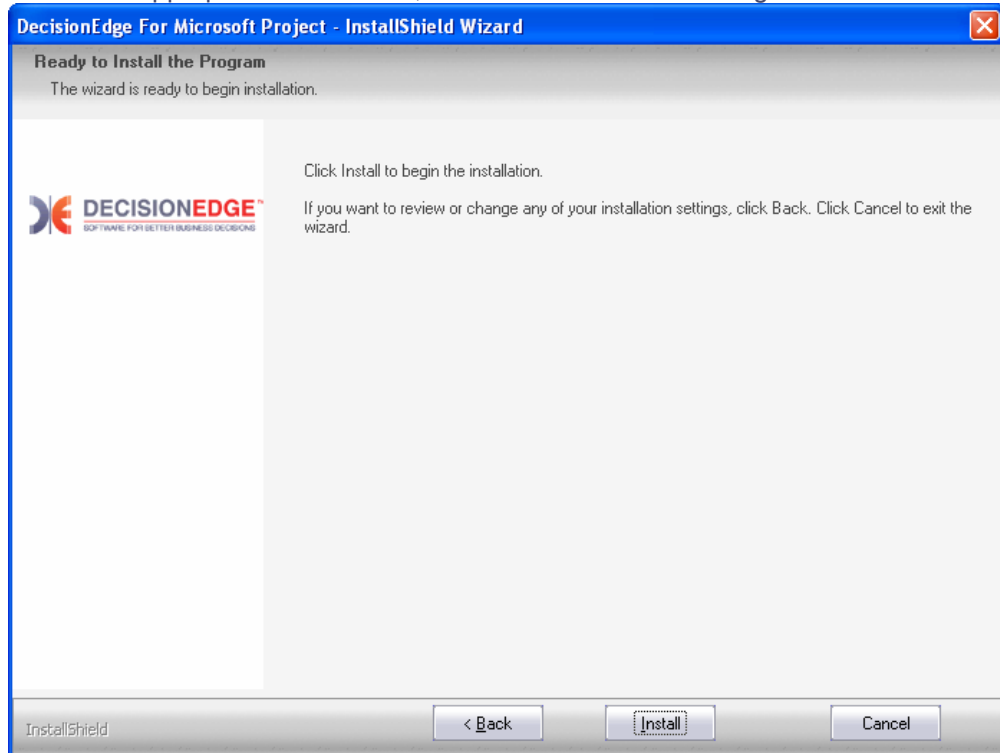


6. Click Next and then select either Complete or Custom Install.

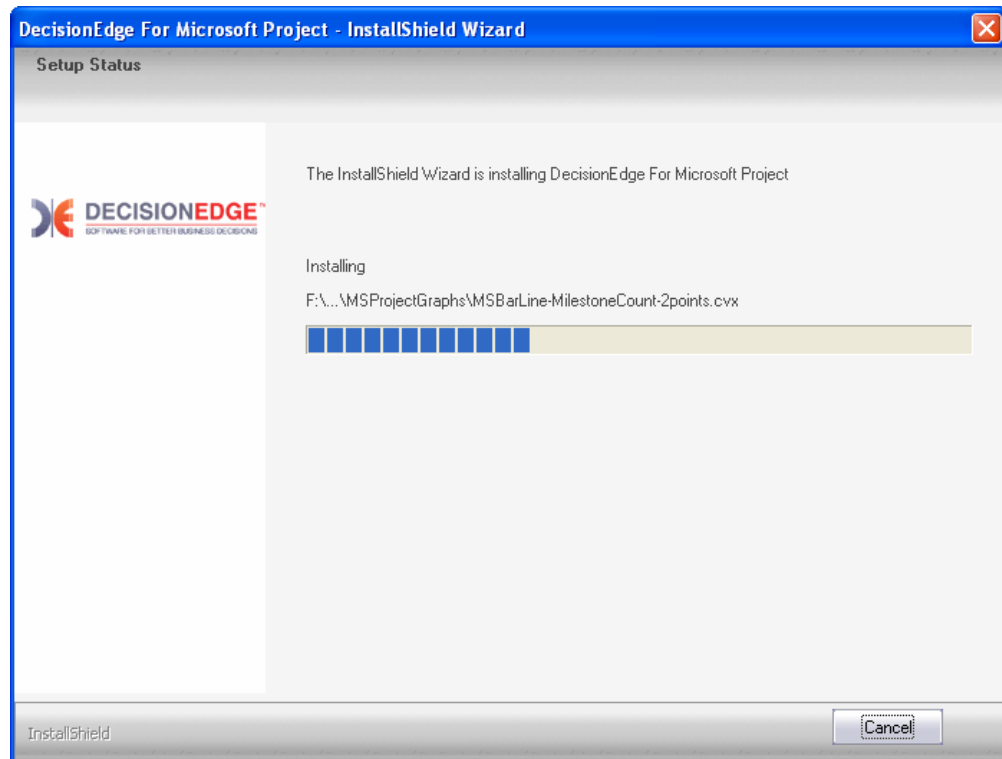
- **Complete** installs the software, sample project, and all charts and reports into the default directory: C:\Program Files\DecisionEdge
- **Custom** gives you the option to specify the installation directory and components.



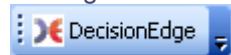
7. Follow the appropriate instructions, and then click "Install" to begin installation:



8. The software will be installed:



9. When the installation is finished, click Finish to exit.
10. Open Microsoft Project, open one or many projects, and start DecisionEdge by clicking the new DecisionEdge toolbar button:



Licensing DecisionEdge Suite for Microsoft Project

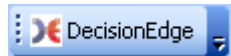
The software installs with a time limit. To continue using the software after the initial time limit, you must purchase a full-use license directly from DecisionEdge.

Until you purchase a license, you will see a splash screen like this:



To Purchase a License:

1. Start DecisionEdge clicking the new DecisionEdge toolbar button in Microsoft Project



2. Click the Buy Now! button on the splash screen
3. Follow the on screen instructions to purchase a license on the DecisionEdge website.

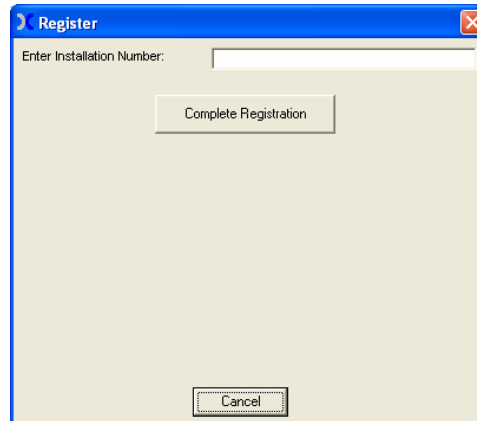
Please contact DecisionEdge if you have any questions:
+1 (888) 610-3343 x701 or info@decisionedge.com

To Register your License:

4. Start DecisionEdge clicking the new DecisionEdge toolbar button in Microsoft Project

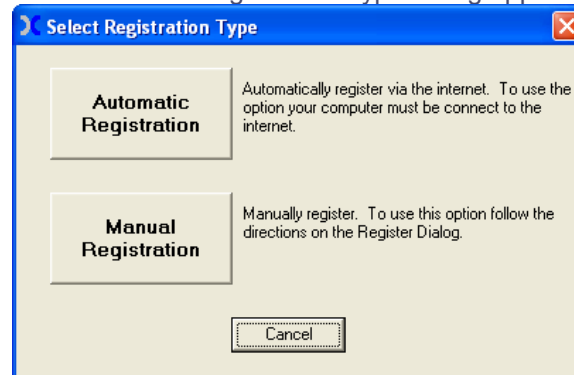


5. If you have not yet purchased or registered a license, the splash screen like the one above will appear.
6. Click Register to begin licensing the software.
7. The Register dialog appears:



8. Enter the installation number provided to you by DecisionEdge during the purchase process. This is a 16 digit number. Click Complete Registration to continue.

9. The Select Registration Type dialog appears:

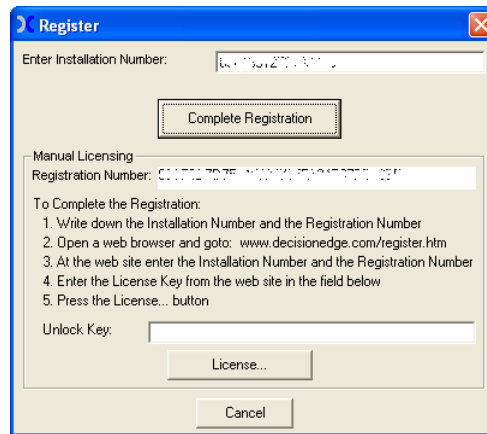


This dialog gives you two choices on how to complete the registration of your software:

- **Automatic Registration** - If your computer has Internet connection, then select this option to automatically register with the DecisionEdge web server. Typically, this option only takes 30 seconds to complete. Only your Registration number, and an internally generated "Installation Number" is sent to the DecisionEdge web site. You will be notified when registration is complete.
- **Manual Registration** - To register manually, follow the instructions below.

To register your product manually:

After selecting Manual Registration on the Select Registration Type dialog, a Register dialog appears that displays the Installation Number, Registration Number, and the DecisionEdge web address where you can register manually.



1. Open your Internet Browser, and enter the registration web address.

If you do not have Internet access on the computer, write down the Installation Number, the Registration Number, and the Web address, and complete the registration (steps below) on a computer with Internet access. Finally, enter the Unlock Key in the Unlock Key field.

2. Enter the Installation Number and Registration Number in the registration web page, and click Submit.
3. The registration form web page returns the Unlock Key.
4. Type that key in the Unlock Key field in the Register dialog.
5. Click License....

The software will process the unlock key and convert itself into a full-license. You will no longer see the Evaluation Version splash screen. Thank you for your purchase!

Opening a Chart or Report

Steps for opening a chart:

1) Click the DecisionEdge button in Microsoft Project:



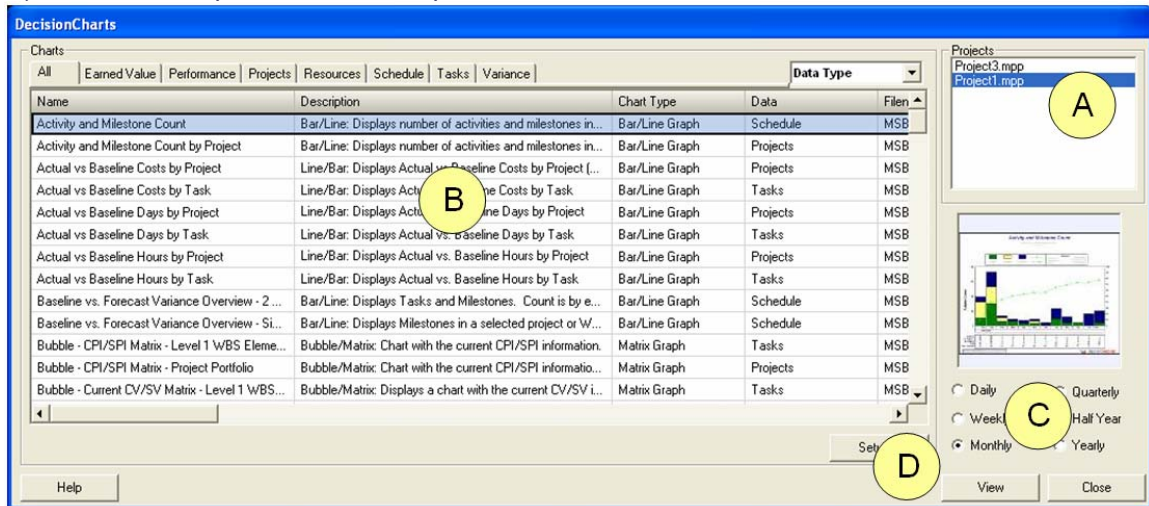
2) Follow these steps in the main dialog:

A) Select one or more open projects on the right side
(use Ctrl-Click and Shift-Click to select multiple projects)

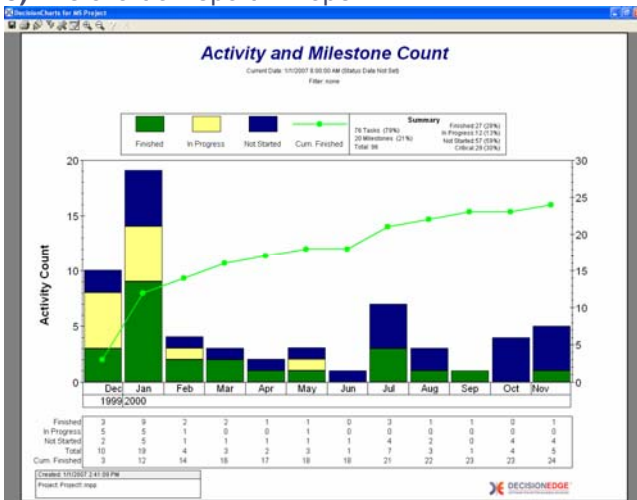
B) Select a chart or report from the selection grid. Click on the tabs to filter on specific charts and reports. Use the drop down button to choose between Data Type and Chart Type tabs.

C) Select the time period increment (larger increments provide better performance but might not give desired detail level).

D) Click View to open the chart or report.



3) The chart or report will open:



Index

Automatic Registration, 6

Copyrights, ii

DecisionChartsForMSP.exe, 2

DecisionEdge

 Contact Information, ii

DecisionEdge Designer, vi

DecisionEdge Suite for Microsoft Project

 Benefits, v

 Evaluation Mode, vi

 Getting Started Guide, vii

 Installing, 2

 Licensing, 6

 Online Help, vii

 Support, vii

 What Is..., v

Manual Registration, 6

Preface, iv

Requirements, vi

Trademarks, ii

U.S. Government Restricted Rights, ii

Use and Disclosure Restrictions, ii