



Best Practices/Saving and Updating your Projects in Project Server

Written from the perspective of best practices to build a good project schedule and then maintain a healthy, corruption-free Project Server database.

When Saving, Publishing or Closing a project, observe the status bar and do not proceed with an action before the bar indicates Ready.

- Closing a project while it's in Saving or Publishing mode could leave the project in Check-in Pending status.

1. Check-in Pending status

File > Open or Open folder icon launches the Open dialog box:

- The dialog box provides the option to open a cached project or retrieve a project from Project Server
- The List Details view allows you to see the status of the projects, i.e. checked out, check-in pending or it's available to be checked out
 - If a cached project is in Check-in Pending status, open the project (read-only mode) and close it without saving then check status again

2. Cleanup Cache

If cached projects have been saved successfully and are no longer required, you can clear the cache using **Tools > Local Project Cache > Cleanup Cache > Project Filter**.

- For Projects not checked out to you
 - select all the projects, click Remove from Cache > Close
- For Projects checked out to you (if you didn't deliberately open the projects indicated, they need attention)

File > Open – verify project status, if Check-in Pending, Open/Close project

PWA Project Center > Check-in my projects – what is the checked out date?

If stale, check in the project

If current, check your queued jobs

Personal Settings > My Queued Jobs – check job state, queue position, errors

If your queued project job has failed, do not delete the cached project diagnose the cause of the failure before cancelling the jobs

- Things to check - the queue history, forced check-in enterprise objects, error message, type of job

3. Cached projects

If a project fails to save successfully in the queue, you'll need to open and save the cached project again.

- If the cached project is removed from cache before it's successfully saved, any changes made will be lost.
- If a cached project is opened after task updates are submitted, a dialog box advising that there are updates will launch.
- If the project is in Check-in Pending status when the updates message occurs and you select Yes and click on the link to view, it will open the Task Updates
- The project is in read-only mode therefore you will not be able to save the changes. Close the project so that it can be checked-in.

4. Task Updates

Updates will be pushed to MS Project when accepted in **PWA Approvals >Task Updates**

- When the project is opened, the updates will be visible.
- If a cached project is opened after task updates are accepted, the cached project will sync with Project Server on opening.
- If the project is already opened and task updates are accepted, on saving the changes you've made, the task updates will also be saved.

Any comments or requests?
Please don't hesitate to let us know!

