Web TimeSheet
Integration Manager for
Microsoft Project Standard/Professional

Version 2.6

USER GUIDE

Notices

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Table of Contents

CHAPTER 1
Welcome

Welcome to the *Web TimeSheet Integration Manager for Microsoft Project Standard/Professional User Guide*. Throughout this user guide, the Web TimeSheet Integration Manager for Microsoft Project Standard/Professional will be referred to as the Integration Manager.

About the Integration Manager

The Integration Manager allows users to transfer project and task information, project team assignments, and timesheet data between Web TimeSheet and Microsoft Project® 2002/2003 Standard/Professional easily and efficiently. Once installed, the Integration Manager is accessible from the **Tools** menu within Microsoft Project.

The Integration Manager allows one-way transfer of timesheet/hours data from Web TimeSheet to Microsoft Project. Bidirectional data transfer is available for project/task information and project team assignments. Bidirectional project/task information includes:

- Project/task structure
- Project manager
- Task estimated cost, with roll-up to the parent level
- Task start and end dates

The project start and end dates can be transferred one way, from Microsoft Project to Web TimeSheet (these dates are automatically determined in Microsoft Project based on the task start and end dates).

Technology

The Integration Manager uses streaming XML (Extensible Markup Language) technology and Microsoft Project Object Model to update data between Web TimeSheet and Microsoft Project. The Integration Manager establishes a link with both the Web TimeSheet database and the Microsoft Project database and transfers data depending on the specified criteria.

About this User Guide

This user guide provides information on installing and using the Integration Manager. The information is organized into chapters and a table of contents is provided for quick reference.

Document Conventions

This manual uses the following conventions:

- References to other areas in the document are shown *in italics and in blue* to indicate they are active links that are internal to the document. To automatically navigate to the section being referenced, select the link.
- Hyperlinks to websites or e-mail addresses are shown in blue and underlined to indicate they are active links external to the document. To open a new browser window to the website or to send an e-mail to the address, select the link.

- Key information is highlighted using a blue background for quick reference. An icon is used to indicate type of information being provided, as follows.
  - The 🗋 icon indicates a note, which provides a reminder of an important requirement or further details on how the software operates.
  - The ⚠ icon indicates a warning notice. Warnings point out features or actions that can have negative results if used incorrectly.
  - The ☑ icon indicates a tip or hint designed to assist you in using the product more efficiently.

> 🗋 The online help system uses these same conventions for easy identification of important notes, warnings, and tips.

Contacting Support

If require further assistance configuring or using the Integration Manager, please contact Replicon's Customer Support team using one of the following methods:

Direct Phone:	403-262-6519 ext 3
Toll-Free Phone:	
North America:	1-877-737-5420 ext 3
Europe:	00-800-7375-4266 ext 3
Australia/New Zealand:	0011-800-7375-4266 ext 3
E-mail:	support@replicon.com
Web-Based Form:	www.replicon.com/supportservices/requesthelp.asp
Fax:	403-233-8046

CHAPTER 2

Installing the Integration Manager

System Requirements

Before installing the Integration Manager, ensure your system meets the following requirements:

- One of the following:
  - Windows 2000 Professional with Service Pack 4 or higher
  - Windows 2000 Server with Service Pack 4 or higher
  - Windows 2003 Server with Service Pack 1 or higher
  - Windows XP with Service Pack 1 or higher
- Administrator access for installation
- A compatible version of Web TimeSheet as specified in the product release notes, and a browser that supports it
- Microsoft Project® 2002/2003 Standard or Professional
- All projects saved in a Microsoft Project database file (.MPD file) (Multiple projects can be saved within a single .MPD file.)

Additionally, version 3.0 or higher of Windows Installer is required to ensure the Integration Manager is accessible from within Microsoft Project. For most users, the correct version will already be installed on their machine. However, if a Windows Installer message box is displayed during the installation process, version 3.0 or higher is not installed and the Integration Manager will only be available as a standalone application. The latest version of Windows Installer can be downloaded from the Microsoft website at www.microsoft.com/downloads/details.aspx?familyid=889482FC-5F56-4A38-B838-DE776FD4138C&displaylang=en.

Installing the Integration Manager

You will need to purchase the Web TimeSheet Integration Manager for Microsoft Project Standard/Professional and obtain the installation file from a Replicon representative.

Installing on the Web TimeSheet Server

The Web TimeSheet Integration Manager for Microsoft Project Standard/Professional is an external application (accessed outside of Web TimeSheet) that is installed on a local machine and accessed from within Microsoft Project. To facilitate installation on all necessary local machines, the administrator may choose to install the Integration Manager on the Web TimeSheet server. Installing on the Web TimeSheet server creates a link in the Web Timesheet **Integration** menu, which users then click on to install the application on their own machines.

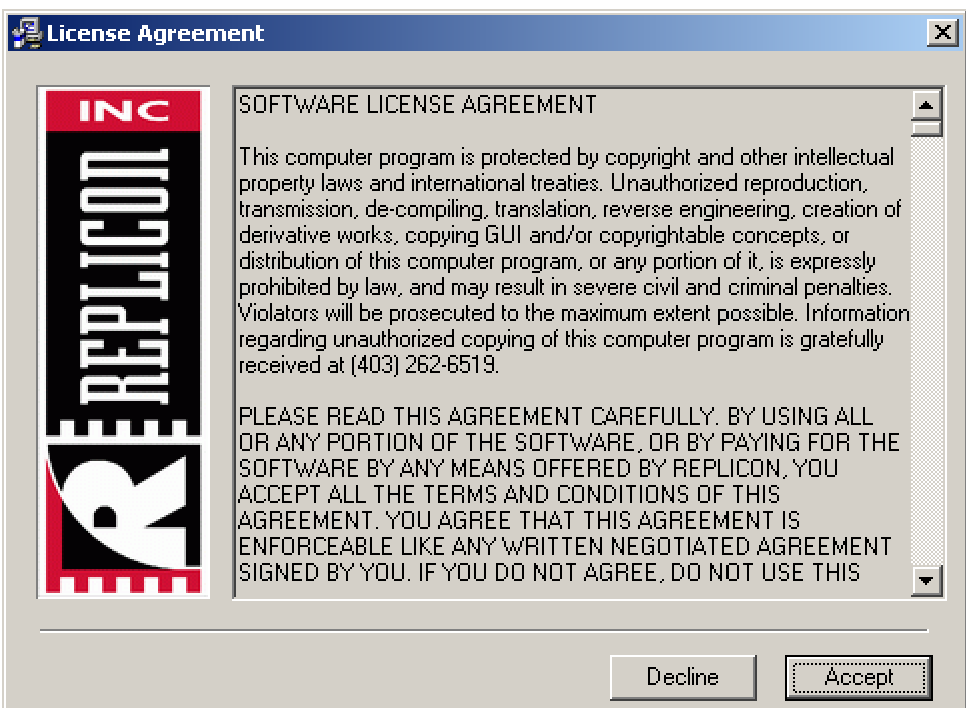
Before installing on the Web TimeSheet server, make sure you have already installed Web TimeSheet. The Integration Manager will need to be installed in the Web TimeSheet directory.

The installation wizard will guide you through the installation process as follows.

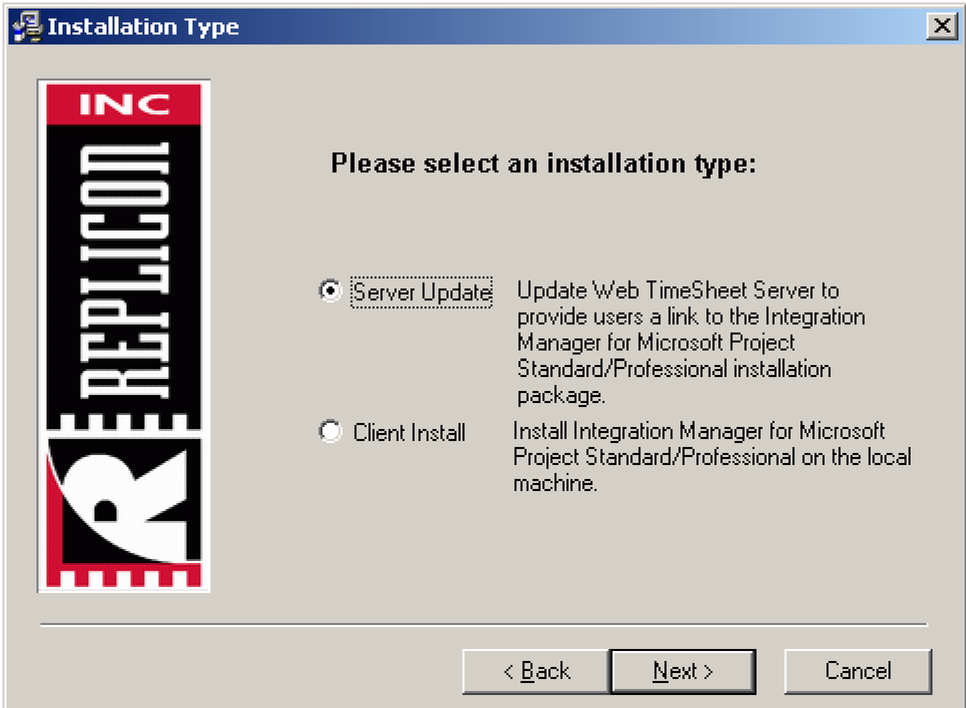
1. Stop the service associated with Web TimeSheet and back up the Web TimeSheet database.

2. Launch the installation file. The **Welcome** screen is displayed. Select **Next** to continue.

3. Review the license agreement and select **Accept** if you agree to the terms.

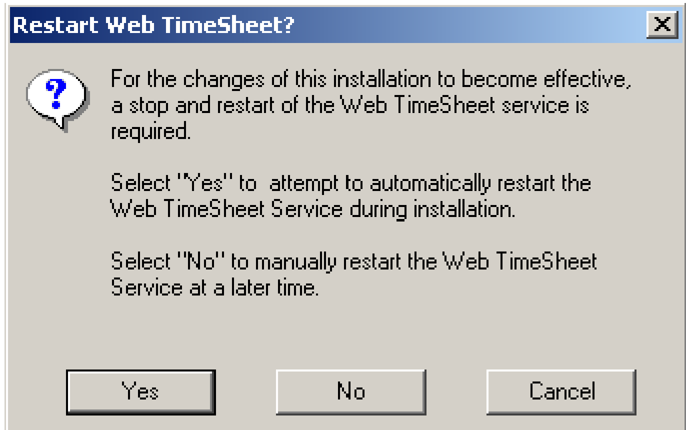


4. Specify that you would like to install the Integration Manager on the Web TimeSheet server. Installing on the Web TimeSheet server will create a link within Web TimeSheet that will allow individual users to install the application on their local machines. Select **Next** to continue.

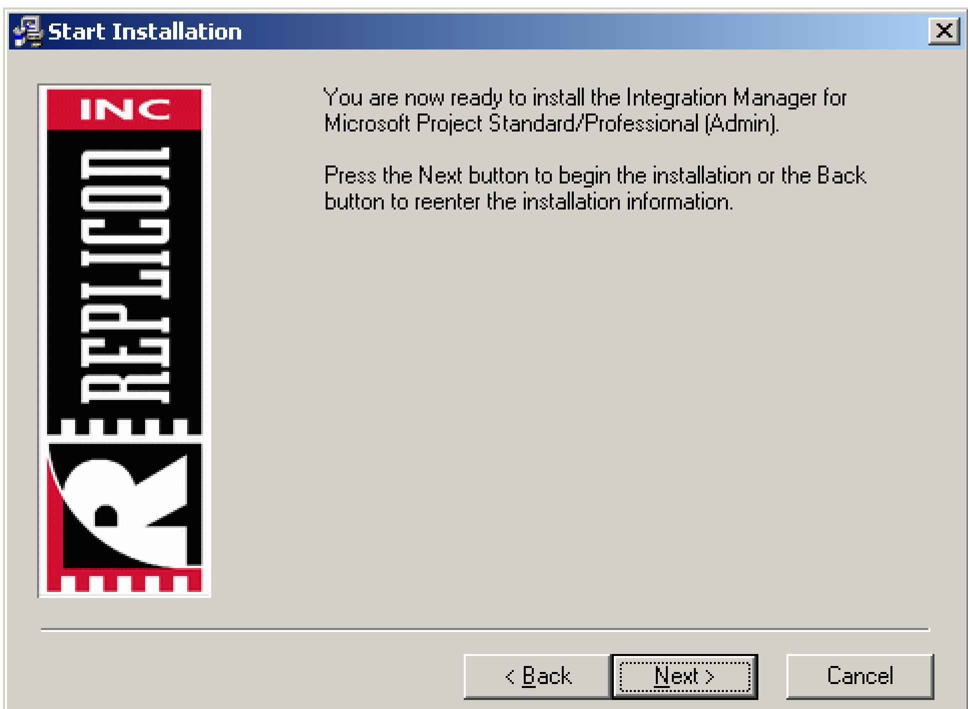


5. Specify the folder in which TimeSheet is installed, which is where the Integration Manager must be installed. Use the **Browse** button to locate the Web TimeSheet folder. Then, select **Next** to continue.

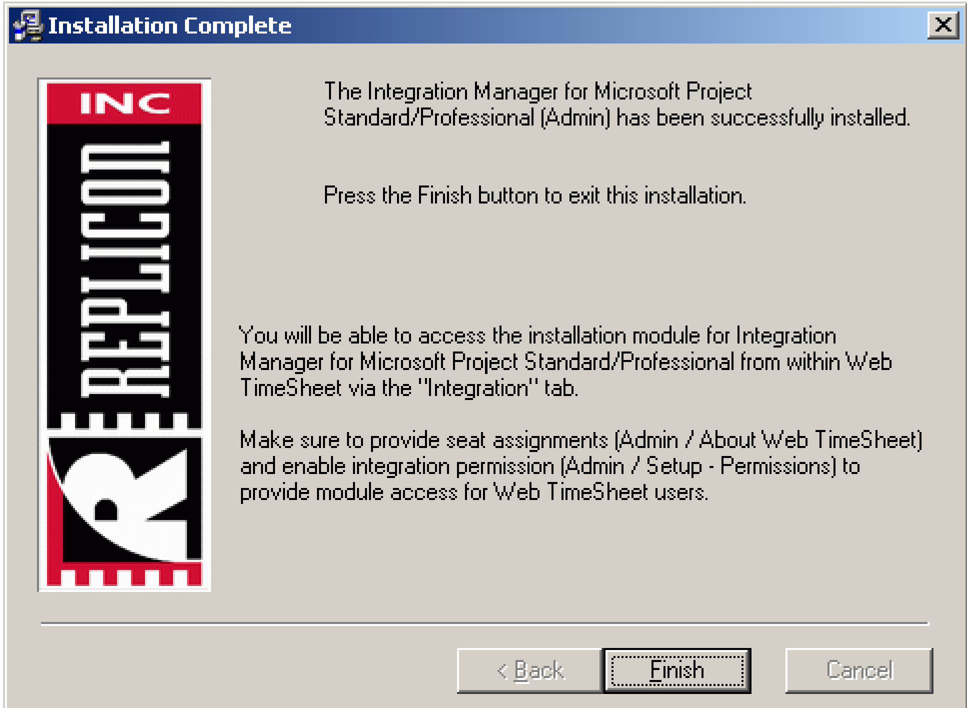
6. To make the installation effective, you will need to restart the Web TimeSheet service. Select **Yes** to automatically restart the service, or **No** to restart the service manually. If you choose to restart the service manually, you will need to do so at the end of the installation to ensure the features are available in Web TimeSheet.



7. Now you are ready to install the Integration Manager. Select the **Next** button to start the installation.



8. When the installation is complete, select the **Finish** button to exit the installation program.



9. If you did not already do so in *Step 6*, restart the Web TimeSheet service.
10. Enter a valid license key and seat assignments for the Integration Manager in Web TimeSheet, as detailed in *Entering a License Key* on page 17.

Users can now install the Integration Manager from within Web TimeSheet.

Installing on a Local Machine

You may install the Integration Manager on a local machine either by downloading/installing from within Web TimeSheet, or by launching the installation file directly on the machine (via CD, network location, etc.). You must have permission to install applications on the local computer.

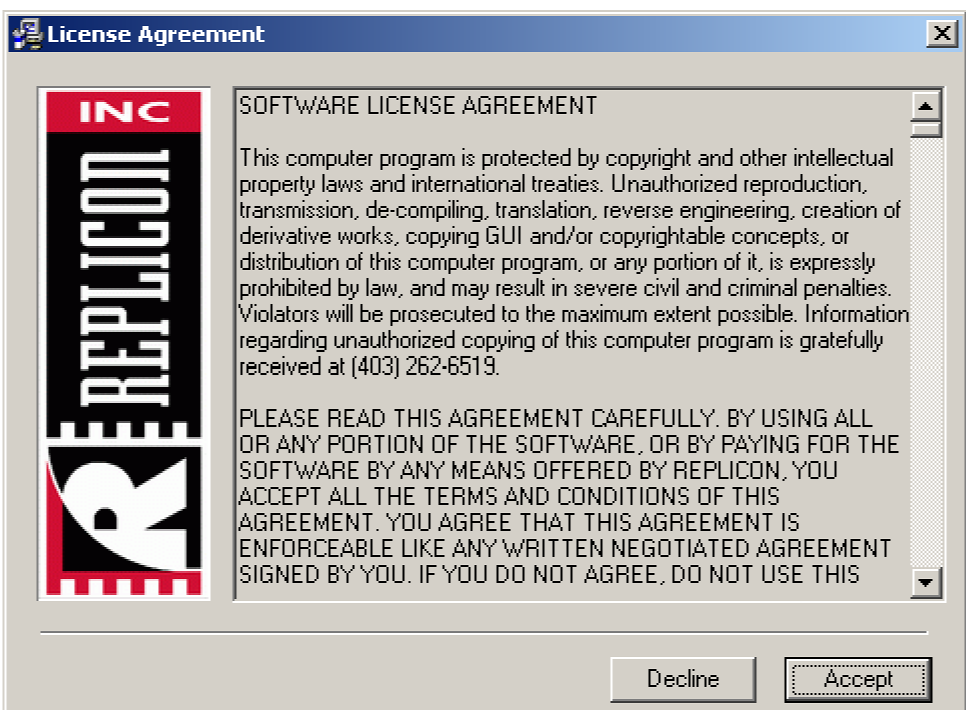
Installing from Within Web TimeSheet

If you are installing from within Web TimeSheet, follow the steps below. Otherwise, skip this section and follow the steps provided in *Installing via a Local or Network Drive* on page 14.

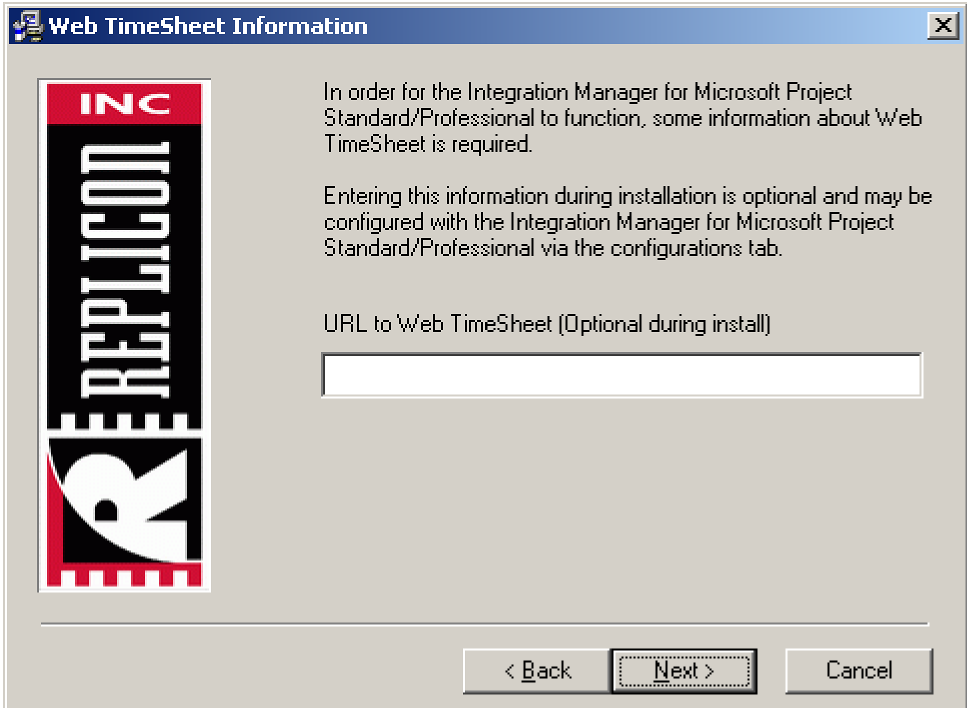
1. Log into Web TimeSheet using your login name and password.
2. Click on the **Integration** button at the top of the screen, and select **Microsoft Project** from the side menu. You will be able to access the **Integration** menu only if you have appropriate Web TimeSheet permissions and a seat assignment for the module.
3. On the **Integration - Microsoft Project** screen, click on the link labeled **Web TimeSheet Integration Manager for Microsoft Project Standard/Professional**.
4. The **File Download** dialog box will prompt you to either open or save the file. Click the **Open** button to start the installation.

5. The first installation screen is the **Welcome** screen. Read this screen carefully, then select **Next** to continue.

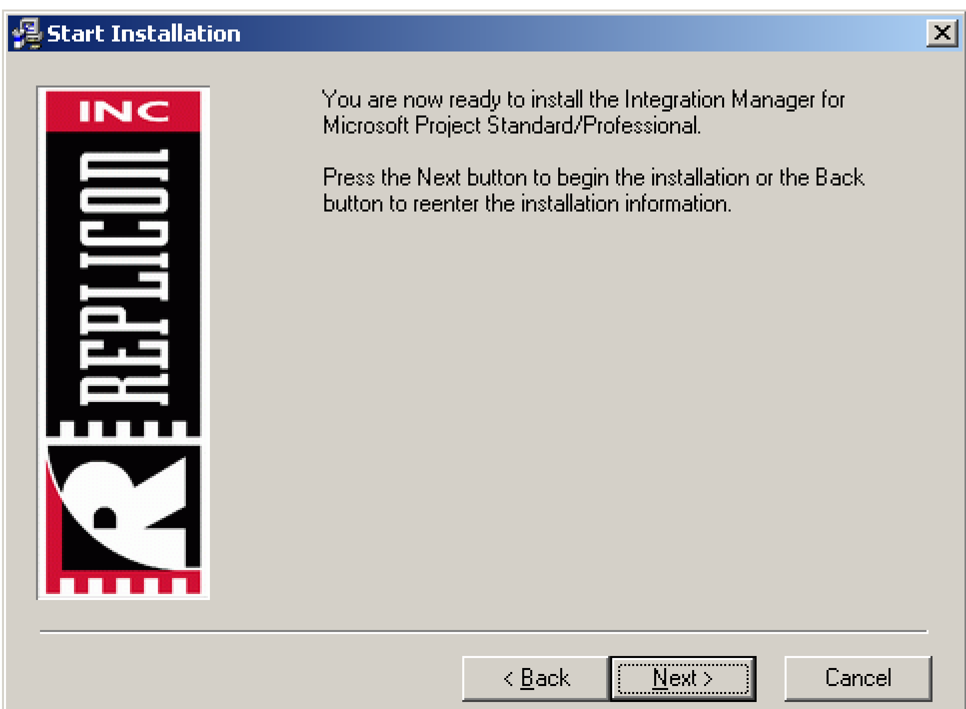
6. Review the license agreement and select **Accept** if you agree to the terms outlined.



7. Now, if you wish, type in the Web TimeSheet URL, which is the URL used to access Web TimeSheet on the server. The Web TimeSheet URL will be required the first time you log into the Integration Manager; however, you do not have to enter it now. If you are unsure of the URL, check with your system administrator. Select **Next** to continue.



8. Now you are ready to install the Integration Manager. Select the **Next** button to start the installation.



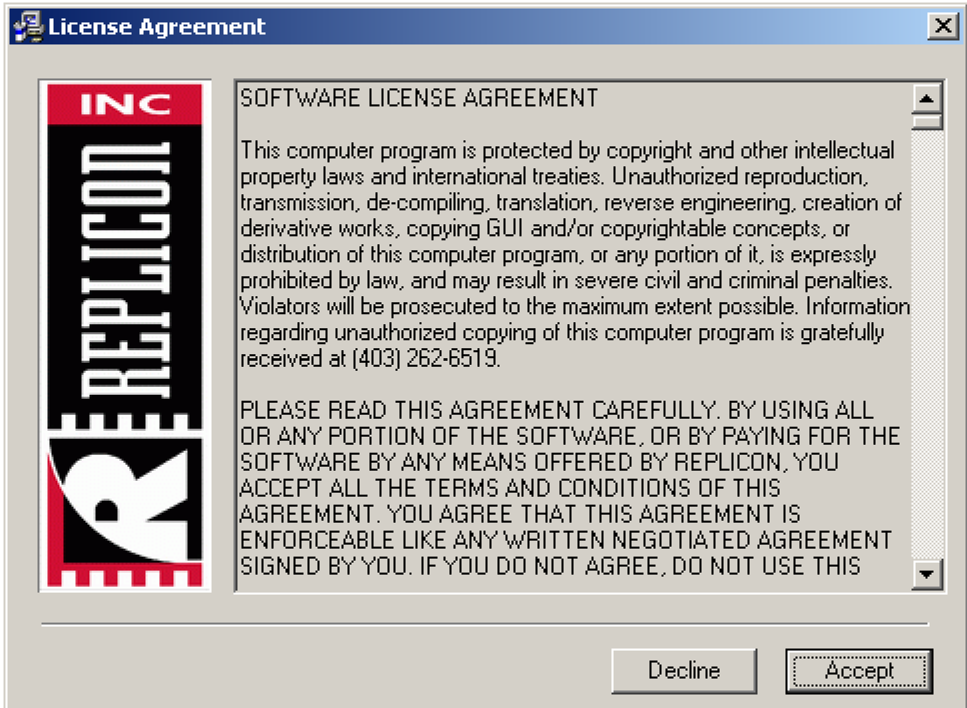
9. When the installation is complete, select the **Finish** button to close the installation wizard.

Installing via a Local or Network Drive

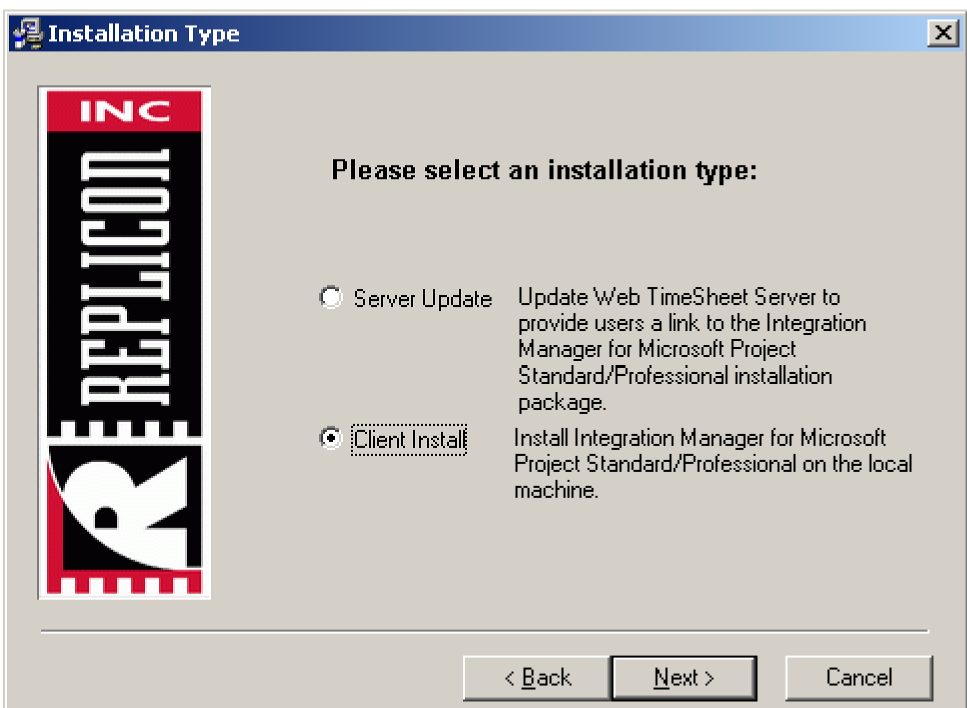
If you are installing the Integration Manager on your local machine directly (via local or network drives), you will need to locate the installation file. Once located, double-click on the file to launch the installation program, which will guide you through the installation process.

1. The first installation screen is the **Welcome** screen. Read this screen carefully, then select **Next** to continue.

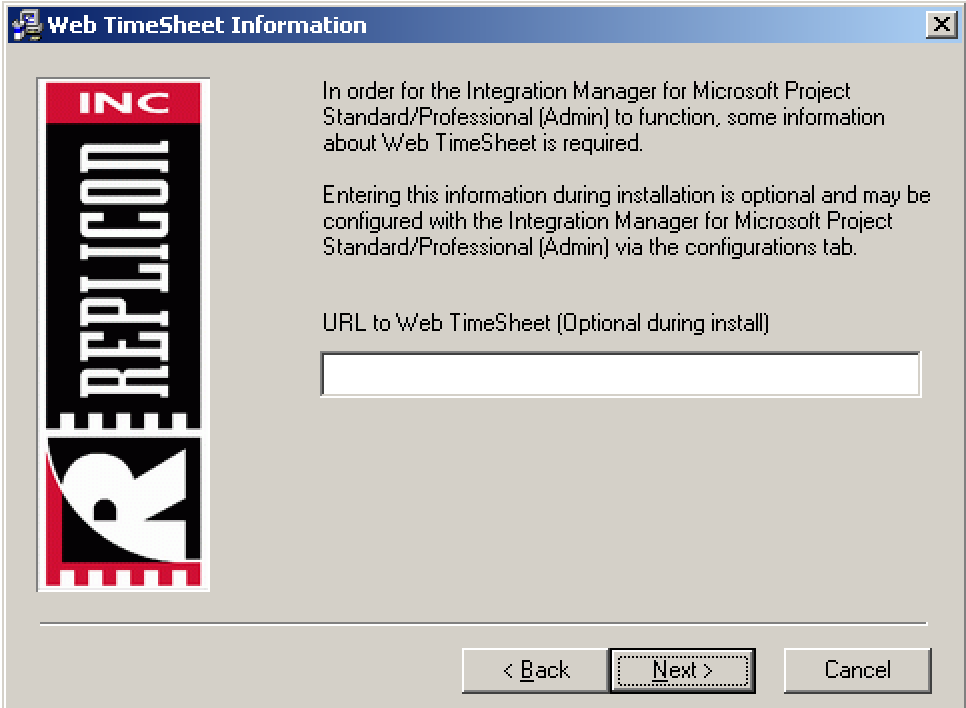
2. Review the license agreement and select **Accept** if you agree to the terms outlined.



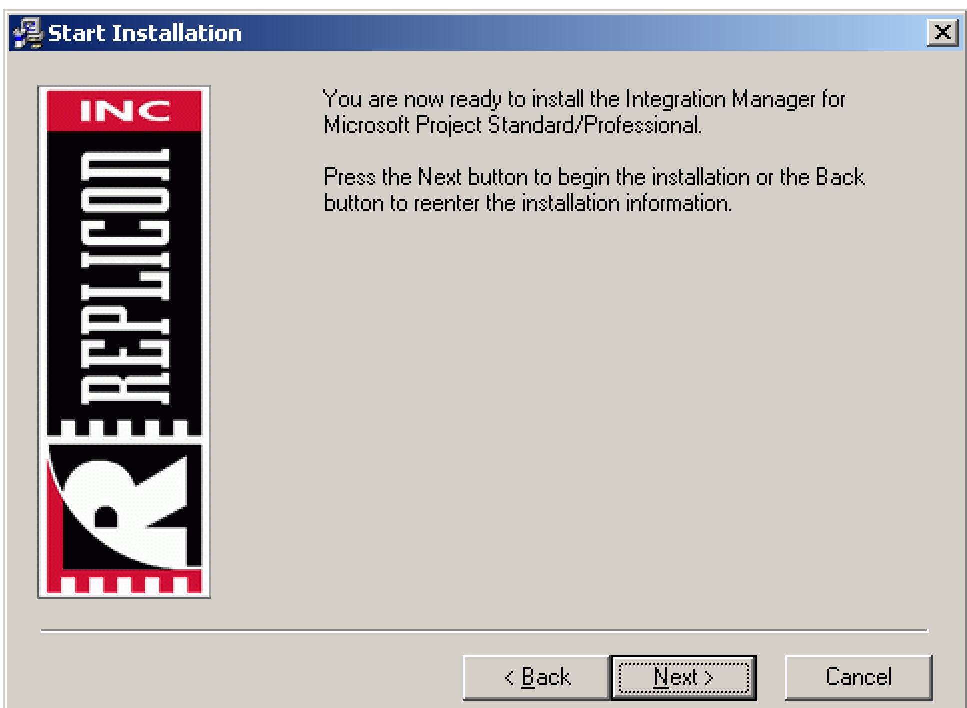
3. Now specify that you would like to install the Integration Manager on the client machine (i.e., the local machine). Select **Next** to continue to the next step.



4. Now, if you wish, type in the Web TimeSheet URL, which is the URL used to access Web TimeSheet on the server. The Web TimeSheet URL will be required the first time you log into the Integration Manager; however, you do not have to enter it now. If you are unsure of the URL, check with your system administrator. Select **Next** to continue.



5. Select **Next** to begin the installation.



6. When the installation is complete, select the **Finish** button to close the installation wizard.

7. Enter a valid license key and seat assignments for the Integration Manager in Web TimeSheet, as detailed in *Entering a License Key* below. Consult your Web TimeSheet system administrator for assistance with this step.

Entering a License Key

Once the Integration Manager is installed, a license key for the Integration Manager must be entered in Web TimeSheet. The license key is provided by Replicon when you purchase the Integration Manager. Additionally, seats must be assigned to the Integration Manager users.

To enter a license key and assign seats:

1. Log in to Web TimeSheet. You must log in as a user assigned a permssion that includes the **System/License info** item. If you do not have this permission level, consult your Web TimeSheet system administrator for assistance.
2. Select **Admin** from the top menu bar.
3. Select **About Web TimeSheet** from the side menu bar.
4. Select the **License Keys** tab.
5. Select **Add**.
6. Enter the license key provided with the Integration Manager in the **License Key** field.
7. Select **Save**.
8. Select the **Seat Assignments** tab.
9. Select the entry for **Microsoft Project Std/Pro**.
10. Select the users who will be using the Integration Manager from the **Available Users** list.
11. Select the 

button.

The users who will be assigned a seat under the license agreement are listed in the **Assigned Users** list box.

12. Select **Save**.

CHAPTER 3
Getting Started

Starting the Integration Manager

The Integration Manager must be installed on your local computer in order to transfer data. Once installed, you can access the Integration Manager following the steps below:

1. Launch Microsoft Project and open a project file.
2. In the **Tools** menu, select **Web TimeSheet Integration...**.

   If the Integration Manager is not available from the **Tools** menu, access it using the standalone version. The standalone version can be accessed from the Windows **Start** menu. If using the standalone version, when the Integration Manager launches you will need to specify the Microsoft Project database file containing the projects you wish to work with.

3. In the **Web TimeSheet Security Login** dialog box, type the **Web TimeSheet URL**, which is the URL used to access Web TimeSheet on the server (required the first time you log in). If you are unsure of the URL, check with your system administrator.
4. Enter the login name and password you normally use to log into Web TimeSheet.
5. If you wish to bypass the login screen in the future, check the box at the bottom of the login screen labeled **Automatically login to Web TimeSheet next time**. You will still be able to change your login information, if necessary, from the **Configuration** tab within the Integration Manager.
6. When you are ready, click the **Connect** button to connect to Web TimeSheet. If the connection is successful, the Integration Manager will open in a new window.

To install and use the Integration Manager, you must have a valid license key and each user must have a seat assignment for the module, as detailed in *Entering a License Key* on page 17.

If you are using the standalone version of the Integration Manager, you must also specify the Microsoft Project database file (.MPD file) containing the projects you wish to update before doing anything else. To specify the database file, select the **Configuration** tab and select **Browse** in the **Project File Configuration** section. Locate the Microsoft Project database file and select the **Open** button. The Integration Manager will automatically update the **Available Projects** list in the **General** tab when the database file is selected.

Possible Reasons for Connection Failure

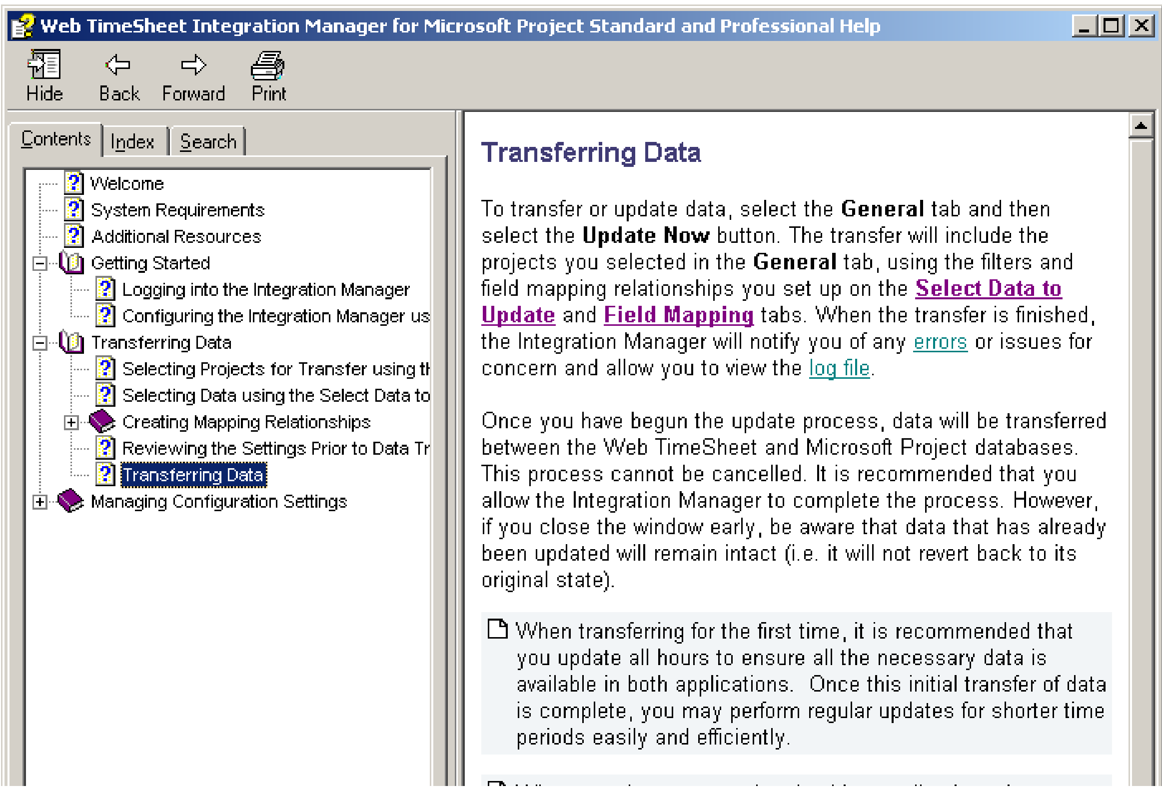
If you are unable to connect to Web TimeSheet, the Integration Manager will display an error message indicating the reason why the connection failed. Possible reasons for a failed connection include:

- **User Name/Password Error**
  Your user name does not exist, your user profile has been disabled, or your password is invalid. If you cannot resolve the issue on your own, please contact your Web TimeSheet administrator.
- **License Error**
  You do not have a valid license key and/or seat assignment for the Web TimeSheet Integration Manager for Microsoft Project Standard/Professional, or your license key has expired. Please contact your Web TimeSheet administrator for further information.

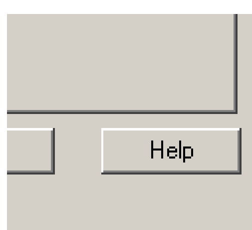
- **Server Connection Error**
  The server location is invalid, or there is a problem connecting to the Web TimeSheet server. Please contact your system administrator for further information.
- **Interrupted Connection**
  The connection to the Web TimeSheet server has been interrupted. The Integration Manager will automatically try to reconnect before requiring feedback. If you receive this error, you may choose to retry, or cancel the connection and try again later.

Accessing the Online Help

The Integration Manager includes an online help system that provides comprehensive information on using the software to complete key tasks, as shown below.



To access the online help, select the **Help** button in the bottom, right hand corner of the main Integration Manager window.



CHAPTER 4

Using the Integration Manager

The Web TimeSheet Integration Manager for Microsoft Project Standard/Professional is designed to allow you to update data between Web TimeSheet and Microsoft Project Standard/Professional 2002/2003.

Initially, you will need to specify some setup options to ensure that the proper data is updated and the field mapping meets your needs. Later, you can perform regular updates based on the setup options you selected (or you can redefine your setup, if necessary).

> If you have set up your project in Web TimeSheet and want to transfer it to Microsoft Project, you will need to open and save a blank project in Microsoft Project before launching the Integration Manager.

> When updating for the first time, it is recommended that you update all hours within the project start and end dates to ensure all the necessary data is available in both applications. Once this initial transfer of data is complete, you may perform regular updates for shorter time periods easily and efficiently.

> When updating projects, only the first ten levels of the hierarchy will be updated.

About Microsoft Project Database Files

Projects to be created or updated in Web TimeSheet from Microsoft Project must be saved to a Microsoft Project database file (.MPD file). If the project in Microsoft Project has not already been saved, you will be prompted to save it to a database file when you launch the Integration Manager.

General Setup Options

The **General** tab is the first tab displayed on the Integration Manager window. This tab is used to specify the direction of the update and the projects to be updated (when applicable).

1. Select the direction of the data update. The default selection is from Web TimeSheet to Microsoft Project. To change this setting, click the button next to the option for Microsoft Project to Web TimeSheet.
2. Choose the projects you want to update. The box on the left provides a list of all available projects in the source application. Select the projects you wish to update (to select multiple projects, hold down the `Ctrl` key while clicking on the project names). Click on the ⇨ button to add the projects to the list of selected projects. To ensure the list of available projects is up to date, it is recommended that you click the **Refresh List** button before selecting projects.

   If updating data from Web TimeSheet to Microsoft Project, you can select any number of the projects available within Web TimeSheet. If a project generated in Web TimeSheet has not been previously updated to Microsoft Project, when the update occurs a new project will be created in Microsoft Project under the project name used in Web TimeSheet.

   > Web TimeSheet projects assigned multiple clients using the **Bucket method** option will not be listed as available for transfer.

   If updating data from Microsoft Project to Web TimeSheet, you can select any number of the projects available in the active Microsoft Project database file (.MPD file), that is the database file in which the currently open project resides. If a project generated in Microsoft Project has not been previously updated to Web TimeSheet, when the update occurs a new project will be created in Web TimeSheet under the project name used in Microsoft Project.

3. If you want to perform an update, click the **Update Now** button. The update will include all setup options you selected on the **General** tab, as well as the filters and field mapping relationships you set up on the **Select Data to Update** and **Field Mapping** tabs. When the update is finished, the Integration Manager will notify you of any errors or issues for concern and allow you to view the log file.

Once you have begun the update process, data will be transferred between the Web TimeSheet and Microsoft Project databases. This process cannot be cancelled. It is recommended that you allow the Integration Manager to complete the process; however, if you close the window early, be aware that data that has already been updated will remain intact (i.e., it will not revert back to its original state).

Log File

The log file provides a complete log of the events that took place during the update process, including errors and items that were not updated due to problems with Web TimeSheet editing permissions. (If your permissions did not allow you to edit certain information, see your Web TimeSheet administrator for further clarification).

Select Data to Update

You will use the **Select Data to Update** tab to specify the types of data you want to update either in Web TimeSheet or in Microsoft Project (depending on the update direction you selected on the **General** tab). Before selecting the type of data, consider the direction in which data will be updated. Depending on the direction, only certain options will be available in the steps that follow. To specify the types of data to update, use the instructions that follow.

1. If updating from Web TimeSheet, specify whether you want to include task hours in the update. You may choose from all hours (regardless of whether the time has been committed/approved), or from approved hours. Selecting all hours might be beneficial if you have a short project cycle or deadlines that fall outside the usual timesheet due dates. Selecting approved hours might be beneficial if your project has a longer cycle (one where the estimate vs. actual values do not require constant comparison).

   Time will be updated only for resources who are set up explicitly as members of the project team in Web TimeSheet (not members who receive their assignments via an <All> or department assignment). It is recommended that if you add resources to your project, you should perform an update for the project structure/resources before attempting to update any time.

2. Now select the date range for the task hours, if applicable. Your options are:

   - **All**

     If **All** is selected, all dates for which hours have been entered into Web TimeSheet for that project will be included, including those outside of the estimated project start and end dates. If any of the dates do fall outside of the project dates set in Microsoft Project, the project start and end dates will automatically be adjusted to include these dates.

   - **From/To** (date range)
   - **Timesheet Period**
   - **Time Data of**

     The **Time Data of** option allows you to configure the updates to use a relative time period, rather than one defined by specific dates. By using this option, you will not need to adjust the date each time you complete a transfer. The transfer will automatically be adjusted to use data from the current or previous week, as applicable.

     If you select **Current Week**, the transfer will include all time data entered in Web TimeSheet for the week of the transfer date. Data will be included for the time period spanning the most recent Sunday to the day prior to the transfer date. For example, if you are transferring data on Wednesday, data from Sunday to Tuesday will be transferred.

If **Previous Week** is selected, time entered for the week previous to that of the transfer date will be transferred. The previous week spans from Sunday to Saturday.

> If the transfer day is a Sunday, ensure **Previous Week** is selected. If **Current Week** is selected, the time period will include zero days and no data will be transferred.

Whatever you select here will be dependent on the selection you made in *Step 1*, meaning that only those hours meeting both criteria will be updated.

> When updating hours from Web TimeSheet to Microsoft Project, the Integration Manager calculates the total actual work for the project. The **Work** field will not be affected by these calculations because this field is automatically calculated by Microsoft Project based on multiple variables.

3. Select whether to transfer all the applicable time cells or only those that have been modified or added since the last transfer.
4. Under the **Advanced Settings** section, specify whether you want to update project/task information, including any of the items below.
   - **Project/Task Structure**

     When you choose to update the project/task structure, the Integration Manager updates the information for the project and task names, additional project/task information selected in the field mapping, and the task sort order.

     The task sort order is updated only for tasks that remain under the same parent project or task. The Integration Manager will not update (i.e., will return an error) if you attempt to update a task that has been moved from one parent to another. If you need to move a task from one parent to another, it is highly recommended that you close the original task and create a new task (with the same name as the closed task) under the correct parent. Following this practice will ensure that all hours associated with the task are retained accurately.
   - **Project Manager**

     If you select to update the project manager, you must specify the name format the integration manager should use to identify the project manager using the **Resource Name Mapping** field. The default selection is **FirstName LastName** (e.g., `John Smith`). Other options include **LastName FirstName** (`Smith John`) or **Login Name** (`jsmith`).
   - **Task Start Date**
   - **Task End Date**
   - **Project Team**

     Updating the project team information will add/remove employees from the project resources (Microsoft Project) or project team (Web TimeSheet) depending on the direction of the data transfer.

     When transferring project team information, using the **Resource Name Mapping** field you must specify the name format the Integration Manager should use to identify the employee in the target application. The default selection is **FirstName LastName** (e.g., `John Smith`). Other options include **LastName FirstName** (`Smith John`) or **LoginName** (`jsmith`). Note that this format will also be used for mapping the Project Manager if **Update Project Manager** is selected.

> When transferring from Microsoft Project to Web TimeSheet, if a resource has previously been transferred to Web TimeSheet and is transferred again with a different **Resource Name Mapping** selected, the user will be duplicated in Web TimeSheet using the new name mapping.

To choose all of the available options in the **Advanced Settings** section, select **Select All**. To deselect all enabled options, select **Deselect All**.

When transferring the project team, you may choose to transfer only the resources for a project team, or the resources along with their task assignments.

If updating from Microsoft Project to Web TimeSheet, you have the option to create new users for employees who do not already have a user profile in Web TimeSheet. You must have permission to add new users in Web TimeSheet in order to create new users during the update process.

> When you are updating from Microsoft Project to Web TimeSheet, it is recommended that you create new users for employees who do not already have a user profile. Creating new users will ensure that all necessary information is transferred during the update process, and will avoid the need to postpone the update until you or your Web TimeSheet administrator has added the necessary information.

If you choose to add new users, the format the Integration Manager uses to create each new user's login name in Web TimeSheet will be based on the value the **Resource Name Mapping** field is set to. For example, if the resource name is AAA BBB and the **Resource Name Mapping** field is set to **LoginName**, the user's name will be set to AAA BBB and the login name will be AAA BBB. If the mapping field is set to **FirstName LastName**, the user name will be BBB, AAA and the login name will be AAABBB. Finally, if the mapping field is set to **LastName FirstName**, the user name will be set to AAA, BBB and the login name will be set to BBBAAA. For all selections, all new users' passwords will default to `password`.

> When a new user is created, the user automatically receives permission to access timesheets.

Field Mapping

Use the **Field Mapping** tab to set up mapping relationships between Web TimeSheet and Microsoft Project. You can set up mapping relationships for only one update direction at a time (the update direction you selected on the **General** tab). To set up mapping relationships, use the instructions that follow.

1. Select a field name from the drop-down list at the left. This drop-down list contains all the available fields in the source application (the starting point of the update).
2. From the drop-down list at the right, select the field to which you want to map the information (this is the field in the target application that will receive the information – the ending point of the update). Once you have selected a field from this list, it will no longer be available for further mapping.
3. Click the **Add** button. Note that the selected fields have been moved to the **Selected Mapping Relationships** list box.
4. To remove mapping relationships, simply highlight the relationship in the list box and click the **Remove** button.

For more information on the available mapping relationships, refer to *Chapter 6, Field Relationships* on page 30.

Configuration

You will use the **Configuration** tab to change the login information you use to access Web TimeSheet. You will also specify where the resource data file is located, so the Integration Manager can properly match Microsoft Project resources to the appropriate user profiles in Web TimeSheet. To modify your configuration settings, use the instructions that follow.

1. In the **Web TimeSheet Server Configuration** section, modify the **Web TimeSheet URL**, which is the URL used to access Web TimeSheet on the server (required the first time you log in). If you wish to test the new connection (or connect so you can begin updating data), click the **Connect** button.
2. You can also modify your Web TimeSheet user name or Web TimeSheet password. If you are unsure about any of the settings, contact your Web TimeSheet administrator.
3. Now specify whether you want to automatically log into Web TimeSheet each time you start the Integration Manager. You can turn this setting on or off any time you wish.
4. To set the resource pool configuration, select **Browse** to locate the resource data file on your local machine or network. This file must be accessible from the computer you are using to perform updates. Select the appropriate Microsoft Project resource pool file (.MPP file) and click the **Open** button. Note that the file you selected is inserted in the field for the **Local resource data file**.

   > The resource data file is a Microsoft Project resource pool file that contains information on common resources shared across projects.

5. Select the format the Integration Manager should use to identify the resources from the resource file and match them to users in Web TimeSheet. The default selection is **FirstName LastName** (e.g., `John Smith`). Other options include **LastName FirstName** (`Smith John`) or **LoginName** (`jsmith`).

   If the direction is set to update from Microsoft Project to Web TimeSheet, you may also select Microsoft Project custom fields to use for the login name and password of any resources that will be transferred to Web TimeSheet as new users. This information is not required; if you do not set up the custom fields, the Integration Manager will use a default login name (`Firstname Lastname`) and password (`password`). These fields are disabled if the direction is set to update from Web TimeSheet to Microsoft Project as new users are only added in one direction, from Microsoft Project to Web TimeSheet.
6. If you wish to update the resource pool, click the **Update Now** button in the **Resource Pool Configuration** section. The update will begin immediately.

   > If a resource or user has previously been transferred and is transferred again with a different **Resource Name Mapping** selected, the resource/user will be duplicated in the target application using the new name mapping.

7. If you are using the standalone version of the Integration Manager, an additional field labeled **Project File Configuration** will be available. This field is used to specify the Microsoft Project database file (.MPD file) containing the projects you wish to update. To set the **Project File**, select **Browse** to locate the Microsoft Project database file and click the **Open** button. The Integration Manager will automatically update the **Available Projects** list in the **General** tab when the database file is selected.
8. To load the settings from a previously-saved configuration file, select **Browse** in the **Load Configuration File** section. Locate the configuration settings file (.XML file) and select the **Open** button. The Integration Manager will automatically be updated with the configuration settings stored in the file. For more information on saving configuration settings, see *Saving the Configuration Settings*.

9. Enable the **Use this file as the default Configuration** check box to have the selected configuration file loaded by default when the Integration Manager is launched. If this check box is not enabled, each time you start the Integration Manager you will need to either select the configuration file again or manually enter the data transfer settings.
10. Select the action the Integration Manager should take when an error occurs using the **When error occurs during data transfer** options. The Integration Manager can either prompt you to choose between continuing and aborting the transfer, automatically continue the transfer, or automatically abort the transfer.

Managing Configuration Settings

Reviewing the Setting Prior to Data Transfer

Before updating, you may want to review the update options you have selected. Click the **Review** button to launch a separate window containing an overview of the update options from the **General**, **Select Data to Update**, and **Field Mapping** tabs. When you are finished reviewing your selected options, click the **OK** button to close the window.

Saving the Configuration Settings

The data transfer settings you have entered can be saved to a file, which can then be selected at any time to restore the settings to the saved values. A configuration file can also be specified as the default and automatically loaded when the Integration Manager starts. If you typically use multiple configurations, you can create a file for each configuration and select them as needed. To save the current configuration settings:

1. Select the **Save** button.
2. In the **Save Settings to File** dialog box, navigate to the location you wish to save the configuration file to.
3. Enter a name for the configuration file in the **File name** field.
4. Select **Save**.
5. Select **OK** to close the message box indicating that the settings have been saved.

Once the settings are saved to a configuration file, you can then load the settings by selecting the file in the **Configuration** tab.

Configuration Settings File

The data transfer settings are saved in a file with the extension .XML. The following settings are saved in the configuration file:

- The direction of data transfer
- The projects selected for transfer
- The options selected in the **Select Data to Update** tab
- The field mappings selected in the **Field Mapping** tab
- The **Resource Pool Configuration** settings selected in the **Configuration** tab
- If using the standalone version, the **Project File Configuration** specified in the **Configuration** tab

Cancelling Changes Made to the Configuration Settings

If you have made changes to the configuration settings, whether to the default values or those loaded from a configuration file, the changes are discard when you select the **Exit** button. Changes to the configuration settings are only saved when you select the **Save** button.

The Update Process

After setting up and saving the options, you can perform updates at regular intervals without needing to repeat the setup process. To start the update process, simply click the **Update Now** button on the **General** tab of the Integration Manager window. The update will include all setup options selected on the **General** tab, as well as the filters and field mapping relationships set up on the **Select Data to Update** and **Field Mapping** tabs.

When the update is finished, the Integration Manager will notify you of any errors or issues for concern and allow you to save the log file.

> To prevent errors when updating from Web TimeSheet to Microsoft Project, ensure the **Prompt Before Saving** option is disabled in Microsoft Project. To disable the **Prompt Before Saving** option, select **Options** from the **Tools** menu. Then, select the **Save** tab in the **Options** dialog box and clear the **Prompt Before Saving** check box in the **Auto Save** section. Close and re-open Microsoft Project.

CHAPTER 5
Recommended Practices and Additional Notes

Recommended Practices

You should use the following recommended practices when transferring data between Web TimeSheet and Microsoft Project.

If you are a Microsoft Project user integrating with Web TimeSheet for the first time:

- Use Microsoft Project to create and maintain your project profile/project information
- Transfer the projects to Web TimeSheet from Microsoft Project
- Enter time against the projects in Web TimeSheet
- Only change the project information in Microsoft Project

If you are a Web TimeSheet user integrating with Microsoft Project for the first time:

- Transfer any existing Web TimeSheet project information to Microsoft Project for the first time only
- Following this initial transfer of project information, update the projects in Microsoft Project and transfer the updated projects from Microsoft Project back to Web TimeSheet
- Use Web TimeSheet to enter time and transfer only time to Microsoft Project

Notes on Working with Embedded and Externally Linked Projects

There are special considerations when working with projects created in Microsoft Project Standard/Professional that contain embedded projects or externally linked tasks. When working with a project in which a second project is embedded, keep in the mind the following:

- Avoid changing the structure and resource assignments within the project using Web TimeSheet. If you wish to make changes, do so in Microsoft Project only and then transfer the updated information to Web TimeSheet.
- If there is a resource with the same name both in the main project and the project embedded within it, the Integration Manager considers those resources as identical.
- The currency symbol used by each project affects the operation of the Integration Manager as follows:
    - If the main and embedded projects are set to use different currency symbols, data transfer will not occur and the Integration Manager will log an error.
    - If the main project has no currency symbol associated with it and the embedded project’s currency symbol matches that of the regional settings, data will be transferred successfully. If the embedded project’s currency symbol does not match the regional settings, data transfer will fail and the Integration Manager will log an error.
    - If the embedded project has no currency symbol associated with it, data will be transferred successfully, regardless of the main project’s currency symbol.

When working with a project in Microsoft Project that includes tasks that are linked externally, that is to a task within another project, note the following:

- The task to which the external link has been made can be transferred from Microsoft Project to Web TimeSheet. However, when transferring back to Microsoft Project, data for the externally linked task will not be transferred as Microsoft Project does not allow the embedded task to be edited within the main project. A message will be logged by the Integration Manager in the log file when this occurs.

- Do not name the externally linked task with the same name as a task present at the same level in the main project. If the externally linked task has the same task name as another task, only one of the tasks will be transferred to Web TimeSheet, as Web TimeSheet does not allow two tasks of the same name at the same level. The task which appears first in Microsoft Project is the one that is transferred to Web TimeSheet. As a result, when transferring data back to Microsoft Project:
    - If the externally linked task appears first in Microsoft Project, it is the one that is transferred to Web TimeSheet. When transferring data back to Microsoft Project, both tasks of the same name are deleted from within the project.
    - If the externally linked task appears second in Microsoft Project, the original task is the one that is transferred to Web TimeSheet. When transferring data back to Microsoft Project, the externally linked task will be deleted from Microsoft Project, but the original task will remain intact.

Notes on Transferring Time Data with Web TimeSheet Billing Rates Selected

Within Web TimeSheet, users can select a billing rate when entering time against a task. However, when transferring time entries from Web TimeSheet, Microsoft Project does not support transfer of the associated billing rates. If you are tracking costs for the project in Microsoft Project, it is important to note that the Web TimeSheet billing rates will not be reflected in the cost data. However, the Integration Manager does support mapping of Web TimeSheet values to the Microsoft Project **Resource Standard Rate**, which can be used for cost tracking purposes, if desired.

Additionally, Web TimeSheet allows users to select more than one rate when entering time against a task. When these time entries are transferred, the total of all hours entered for the task, regardless of the billing rate selected, will be transferred to Microsoft Project. For example, if 5 hours are entered against `Task 1` using the `Project Manager` rate and 3 hours are entered against `Task 1` using the `Administration` rate, 8 hours will be transferred to Microsoft Project for `Task 1`.

Troubleshooting Tips

The following sections are designed to assist you in resolving issues commonly encountered when using the Integration Manager.

Deleted Task Still Exists in Web TimeSheet after Update

If you have deleted a task in Microsoft Project and the corresponding task has not been deleted in Web TimeSheet after an update, verify that the task is not selected on any users' timesheets. If the task has been selected on a user's timesheet, Web TimeSheet prevents the task from being deleted, even if no time has been entered against it. Have the user select another task or delete the timesheet row and then save the timesheet. Update Web TimeSheet using the Integration Manager again and the task should be deleted from within Web TimeSheet. If the problem persists, contact Replicon's Customer Support team as detailed in *Contacting Support* on page 6.

CHAPTER 6

Field Relationships

On the following pages, the field mappings available when transferring from Web TimeSheet to Microsoft Project and when transferring from Microsoft Project to Web TimeSheet are provided.

Important Notes on Mapping Fields

Keep the following in mind when selecting field mappings:

- Task and resource type custom fields may vary from project to project within a single Microsoft Project database file (.MPD). Only those fields that are common across all projects in the Microsoft Project database file (.MPD file) will be available for mapping.
- When you map from Microsoft Project custom fields to Web TimeSheet user defined fields, keep in mind that calculated fields are excluded due to the inability of Web TimeSheet user defined fields to perform calculations.
- Mapping between Web TimeSheet user defined fields and Microsoft Project custom fields is dependent on the field type. This means that data transfer may fail if the data types are not compatible. For example, a number field cannot successfully transfer data to a date field; however, a number field can successfully transfer data to a text field.

Available Mappings from Web TimeSheet to Microsoft Project

Web TimeSheet Field (source)	Microsoft Project Field (target)	Notes
Project Description	Project Category Project Keyword Project Subject Project Title Project Comments Project Author Project Company	
Project Code	Project Category Project Keyword Project Subject Project Title	
Project Client	Project Company	
Task Code	Custom Fields (Task Type)	
Task Estimated Cost	Custom Fields (Task Type)	Microsoft Project allows entry of the estimated cost only at the bottom level of the project/task structure, therefore you should not enter estimated cost values for any parent projects/tasks in Web TimeSheet. Values entered for higher level tasks will not be included in the update process. Turn on the Project/Task Roll-up feature in Web TimeSheet before the first update is performed from Microsoft Project to Web TimeSheet.
Task Description	Custom Fields (Task Type)	

Web TimeSheet Field (source)	Microsoft Project Field (target)	Notes
User Rate	Resource Standard Rate	
User Hourly Payroll	Resource Standard Rate	
User Hourly Cost	Resource Standard Rate	
Task Level User Defined Fields (Proj/Task Category)	Custom Fields (Task Type)	When mapping from Web TimeSheet to Microsoft Project, you may choose to create mapping relationships between project/task specific user defined fields and Microsoft Project fields. In the list of available fields from Web TimeSheet, you will note that user defined fields include text that identifies the field as project level or task level. Be aware that you cannot map task level user defined fields to a single project field in Microsoft Project because there are many source values (each task may have a different value for the selected field) to a single target value (the project field can only receive one value). If you attempt to map task level user defined fields to project level fields in Microsoft Project, the field data will not be updated and an error will appear in the update log file.
Project Level User Defined Fields (Proj/Task Category)	Project Category Project Keyword Project Subject Project Title Project Comments Project Author Project Company	
User Defined Fields (User Category)	Custom Fields (Resource Type)	

Available Mappings from Microsoft Project to Web TimeSheet

Microsoft Project Field (source)	Web TimeSheet Field (target)	Notes
Project Keyword	Project Code Project Description Project Level User Defined Fields (Proj/Task Category)	
Project Title	Project Code Project Description Project Level User Defined Fields (Proj/Task Category)	
Project Subject	Project Code Project Description Project Level User Defined Fields (Proj/Task Category)	
Project Category	Project Code Project Description Project Level User Defined Fields (Proj/Task Category)	
Project Comments	Project Description Project Level User Defined Fields (Proj/Task Category)	

Microsoft Project Field (source)	Web TimeSheet Field (target)	Notes
Project Work	Project Estimated Hours Project Level User Defined Fields (Proj/Task Category)	
Project Cost	Project Estimated Cost Project Level User Defined Fields (Proj/Task Category)	
Project Actual Hours	Project Level User Defined Fields (Proj/Task Category)	
Task WBS Code	Task Description Task Code Task Level User Defined Fields (Proj/Task Category)	
Task Duration	Task Estimated Hours Task Level User Defined Fields (Proj/Task Category)	
Task Work	Task Estimated Hours Task Level User Defined Fields (Proj/Task Category)	
Task Cost	Task Estimated Cost Task Level User Defined Fields (Proj/Task Category)	
Task Priority	Task Level User Defined Fields (Proj/Task Category)	
Task Unique ID	Task Code Task Level User Defined Fields (Proj/Task Category)	
% Complete	Project Level User Defined Fields (Proj/Task Category) Task Level User Defined Fields (Proj/Task Category)	
Microsoft Project File Name	Project Description Project Level User Defined Fields (Proj/Task Category)	If you map the Microsoft Project file name to a User Defined Field, only the specified User Defined Field for the project (not the task) will be updated.
Custom Fields (Task Type)	Task Description Task Code Task Estimated Cost Task Estimated Hours Task Level User Defined Fields (Proj/Task Category)	When you map from Microsoft Project custom fields to Web TimeSheet User Defined Fields, calculated fields are excluded.
Custom Fields (Resource Type)	User Defined Fields (User Category)	When you map from Microsoft Project custom fields to Web TimeSheet User Defined Fields, calculated fields are excluded.