Office Timesheets

www.officetimesheets.com

Using the Microsoft Project Link

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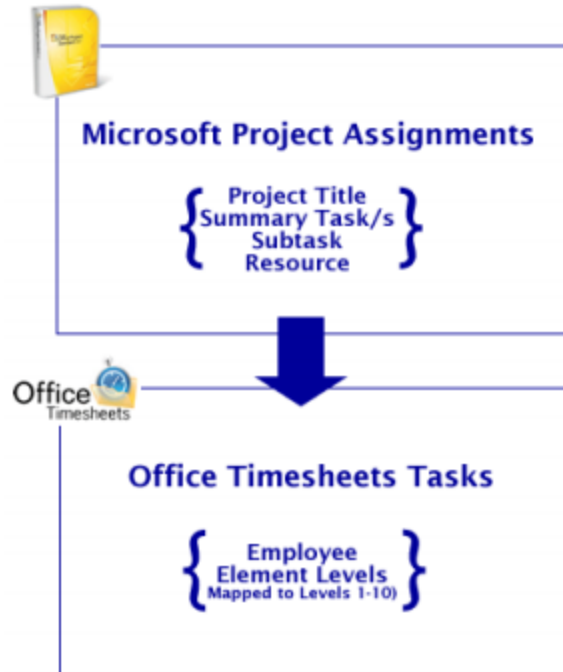
Using the Microsoft Project Link

Office Timesheets includes direct two-way integration with Microsoft Project. In summary, Office Timesheet will allow a user to sync task assignments stored in a Microsoft Project file, populate user's timesheets with their task assignments, and the time time spent on these tasks back into the project file to update the project plan with "actual work" (time spent).
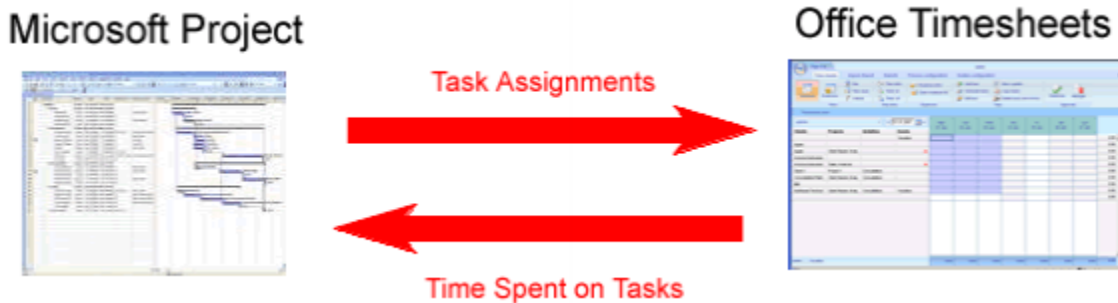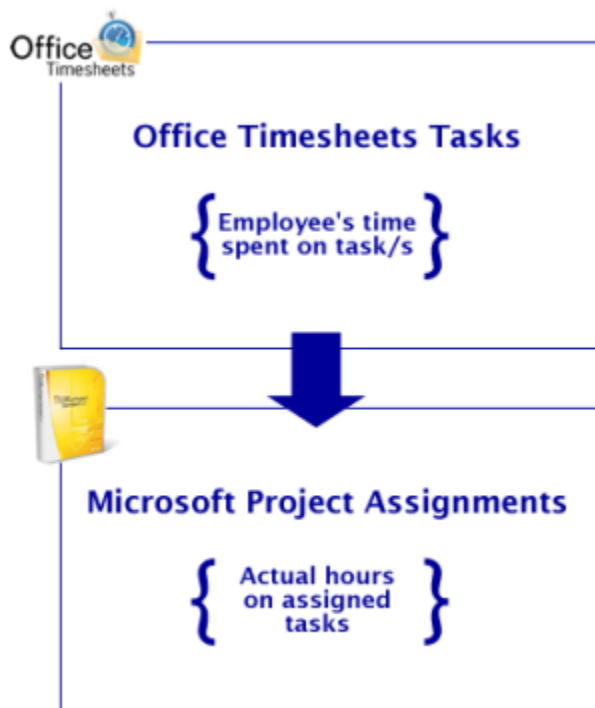

The Microsoft Project Office Timesheets Link enables customers to use best-in-class applications for both planning and tracking projects: Office Timesheets for time and expense tracking and analysis; and Microsoft Project for project planning and scheduling.

How data is transferred between Office Timesheets and Microsoft Project

There are quite a few elements of data that are transferred between Office Timesheets and Microsoft Project when syncing between the two applications using the Microsoft Project Link for use with Office Timesheets app. However, the fundamental operation of Office Timesheets' integration with Microsoft Project is to sync project plan assignments from Microsoft Project files into Office Timesheets; placing appropriate assignments in an employee's (resource) timesheet as tasks.

Time is then recorded by the employee against those tasks, and is then sent back to the Microsoft Project file to update the assignments with Actual Work data recorded from Office Timesheets.


How data is transferred from Microsoft Project to Office Timesheets

As mentioned above, assignments from a Microsoft Project file are extracted and placed on employee

timesheets. Data from each Microsoft Project file that is synced into Office Timesheets is mapped to fields in Office Timesheets based on the structured data hierarchy of Microsoft Project plans and your Office Timesheets database. This concept is quite simple once you have a basic understanding of how task hierarchies in Microsoft Project and Office Timesheets work.

Understanding Microsoft Project Task Hierarchy

Within Microsoft Project you can break down your task list to make it appear more organized and readable by indenting and outdenting the project's tasks to create an outline of the summary tasks (summary task: a task that is made up of subtasks and summarizes those subtasks).
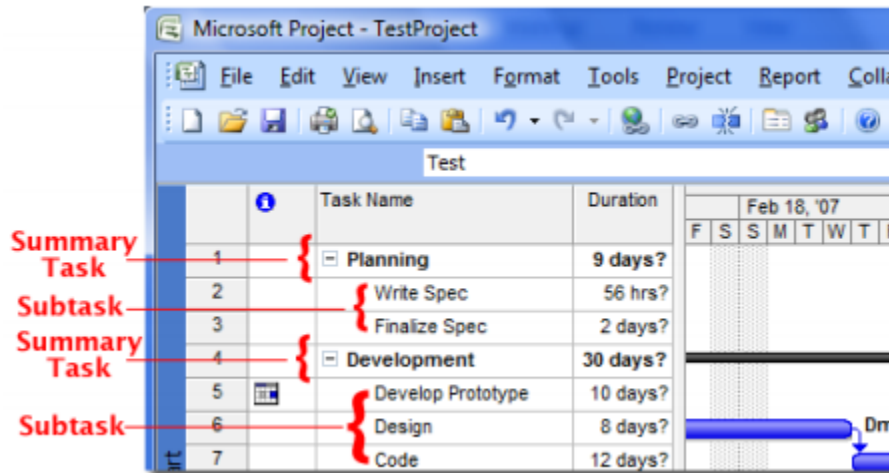

To simplify this concept, we refer to each indent level simply as Indent 1, Indent 2, Indent 3, and so on. At lowest level of task indent is an A**ssignment**: a task that is assigned to one or more employee resources.

Understanding Office Timesheets' Task Hierarchy

Office Timesheets uses a similar type of hierarchical relationship for structuring tasks called Element Levels. However, the element hierarchy within Office Timesheets is not freeform as it is in Microsoft Project. Office Timesheets' task hierarchy is defined by its Element Level structure, which can include a total of 10 tracking levels. The Office Timesheets administrator is responsible for defining the number of levels in which will be tracked, each level's name, and the hierarchy (or order) of those Elements Levels.

In the example shown below, this particular Office Timesheets database has a total of four (4) element levels defined for tracking purposes (not including the Employee).
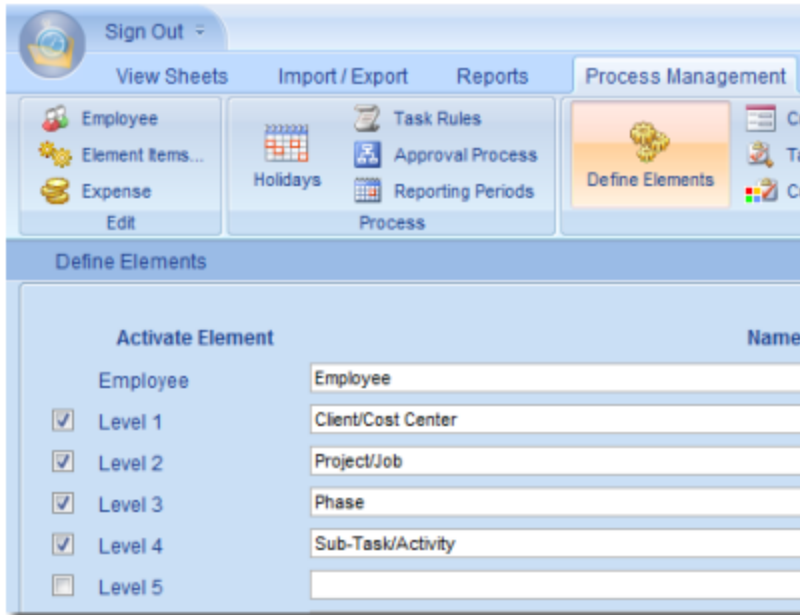
Item lists are then maintained for each defined element level within Office Timesheets. For example, a list of clients, projects, phases, activities, and so on…


Tasks are then created by using a combination of items from your defined Element level lists…

While a task within Office Timesheets can contain many extra pieces of information (start date, end date, task rate, billable/complete flags, etc.), a task within Office Timesheets, at a minimum, must contain an Employee + one (1) other item from a defined element level.

How your project file's task structure is mapped to your Office Timesheets task structure

For logical reasons, task data in Office Timesheets and task data in Microsoft Project is structured somewhat differently. However, Office Timesheets' project link configuration allows you to map the unique structure of each of your Microsoft Project files to your Office Timesheets database element hierarchy so that data flows between the applications in logical way.
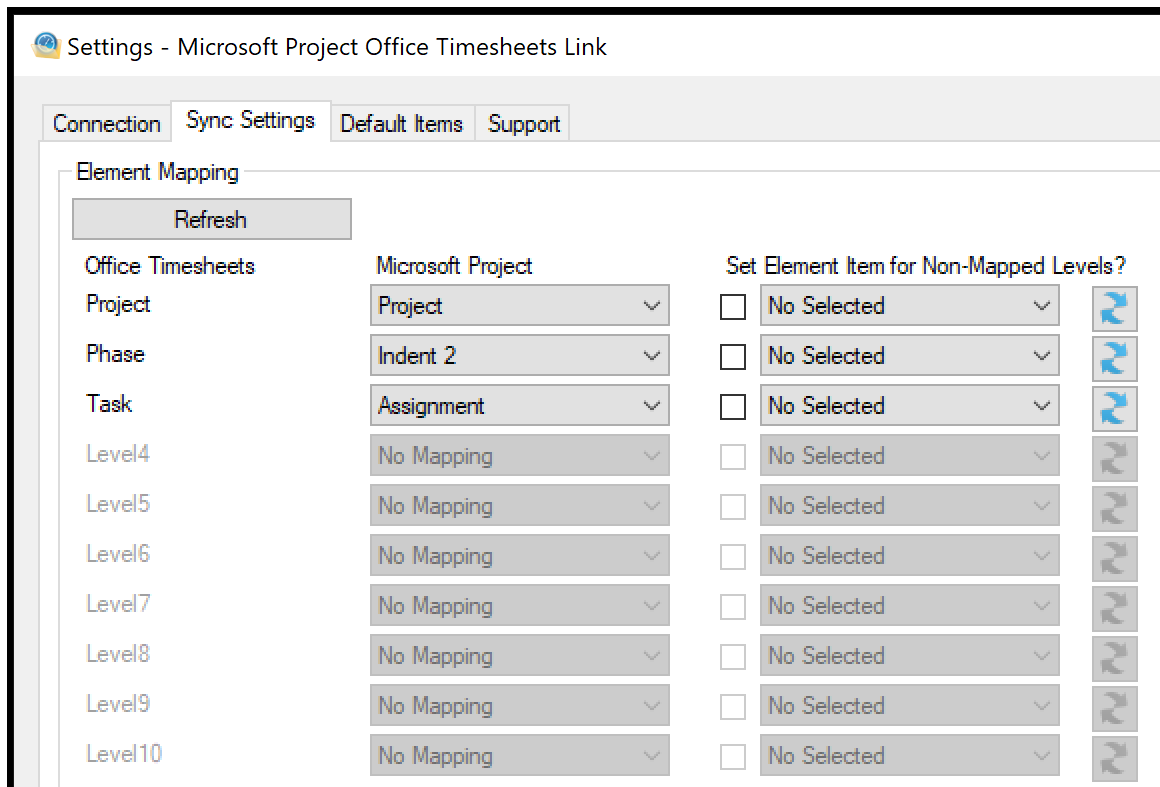
In fact, you can have two or more project files with different task hierarchies and still map them properly to Office Timesheets as sync settings can be configured to map each Microsoft Project file separately. Based on the mapping shown in the previous screenshots, task data from the specified Microsoft Project file will link up the following way:

Finding your Project's Title/Name: To find and/or defined your Microsoft Project plans title click **File -> Project Information -> Advanced Properties…**

The Project Title or Project Name is located in the Title field of the Projects Properties dialog box (highlighted in the illustration below) …

Project Information

Start Date	10/11/2019
Finish Date	10/30/2019
Schedule from	Start
Current Date	Today
Status Date	Today
Last Modified	Today
Project Calendar	Standard
Priority	500

I template.

SoftSheets Properties

General Summary Statistics Content

Title: SoftSheets

Subject:

Author: James Anderson

Manager:

Company:

Category:

Keywords:

Comments:

Hyperlink base:

You can also choose not map any data to a particular level with Office Timesheets by choosing the option "No Mapping", leaving the item selection at the specified element level blank, or optionally linking it to an existing element item. For example, you may have an element tracking level named "Client" and, thus even though your client information is not defined within your Project Plan, you can include it as part of the task information synced from a specified project plan.

The image below visually depicts how data, based on your mapping preferences, is extracted from Microsoft Project to create a task on any employee's timesheet within Office Timesheets…

Data from Microsoft Project…

To Office Timesheets…

How data is transferred back to Microsoft Project from Office Timesheets

When an employee (resource) has entered time against task assignments synced from Microsoft Project to appear in their timesheet, Office Timesheets can send this data back to Microsoft Project to update your project file with the actual hours each employee recoded against their assigned tasks. This allows the project management team to see the actual progress of their project plan and compare it with the original schedule. Office Timesheets can send actual hours data back to your project file as often and as many times as you wish.

The employee enters time in Office Timesheets against the assigned task from Microsoft project…

The employee's time entries update the task's Actual Work field in Microsoft Project...

Using the Office Timesheets Microsoft Project Link

To get started with syncing your Microsoft Project Plan file with Office Timesheets you'll first need to download and install the [Microsoft Project Office Timesheets Link app from here](#), if you haven't done so already.

To start the Microsoft Project Office Timesheets Link app, click the Windows Start menu; open the Microsoft Project Office Timesheets Link folder; and then click on the application **Microsoft Project Office Timesheets Link…**

NOTE: The Microsoft Project Office Timesheets Link app always runs in the background once started. Thus, if closed, you can re-open the application by clicking on the Windows Task
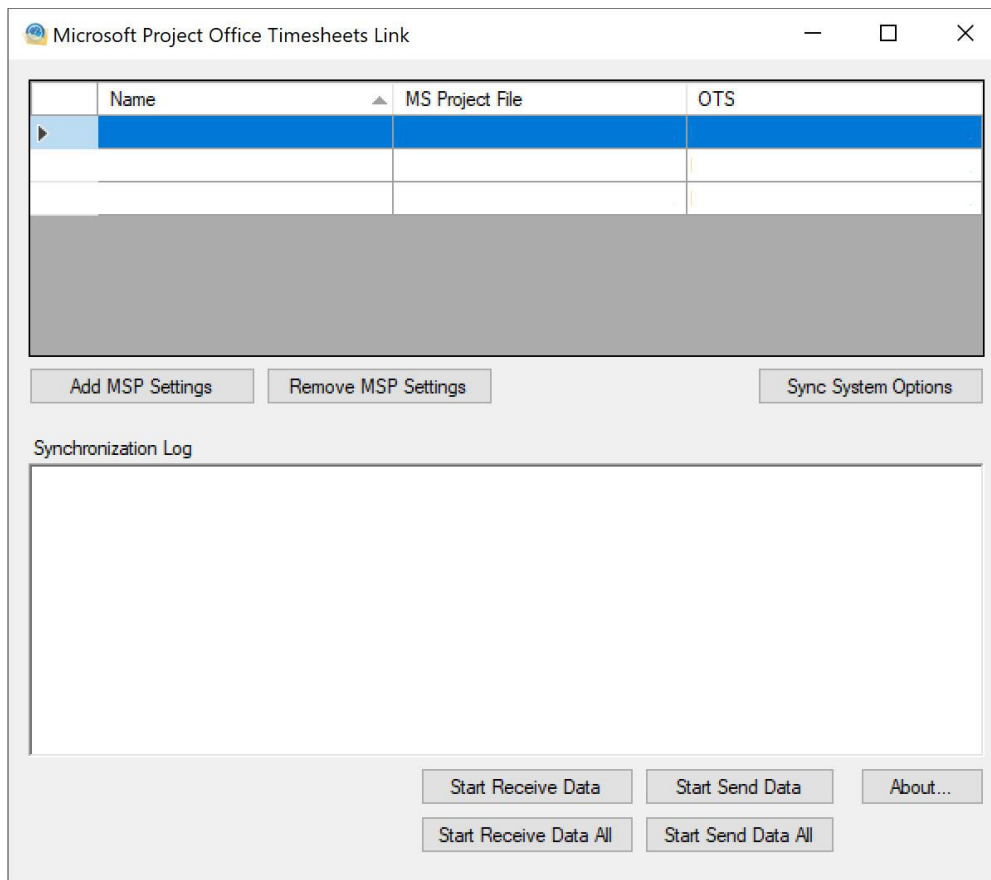
To setup a link between your first project file and your Office Timesheets database click on the **Add MSP Settings** button…

1. Give you sync setting for this project a unique name, one that you easily associate with this particular project plan, and type it into the **Project Settings Name** field…
2. Type in the URL you use to access Office Timesheets in the **Server URL** field…
   a. If you use Windows Authentication in conjunction with Office Timesheets check **Use Windows Authentication** check box…
   b. If you use Office Timesheets authentication to log into Office Timesheets then simply type in your Username and Password into the **Username** and **Password** fields…
   c. Click the **Test Connection** button to ensure you've typed in the correct URL, Username and Password.
3. Next, type in the location to your Microsoft Project MPP file in the **Path to MPP** file field. You can use the **Browse…** button to help you locate the file.

Settings - Microsoft Project Office Timesheets Link

Connection | Sync Settings | Default Items | Support

Project Settings Name | 1. SoftSheets

OTS Connection Settings

Server Login URL | http://localhost/OTS/ProjectTest.login

☐ Use Windows Authentication

Username | admin   Password | *

Test Connection

MS Project File

Path to MPP file

C:\Users\jbone\Desktop\Test Project Link\SoftSheets.mpp

Browse...

OK   Cancel

4. Next, click the Sync Settings tab, and then press the Refresh button to ensure the most recently created Element Level Data in Office Timesheets is loaded.
    a. Map the Microsoft Project column to your Office Timesheets column.

    Mapping options include:

    - **Project** – The official project name/title stored in your Microsoft Project plan file.
    - **Indents 1 – 9** – summary and assignment levels by indent order.
    - **Assignment** – the actual tasks that are assigned to resources.

- **No Mapping** – used when there is no corresponding mapping from Microsoft Project. It could be left blank, or linked to item stored inside of Office Timesheets that is not defined in the project plan. A good example is a client name.
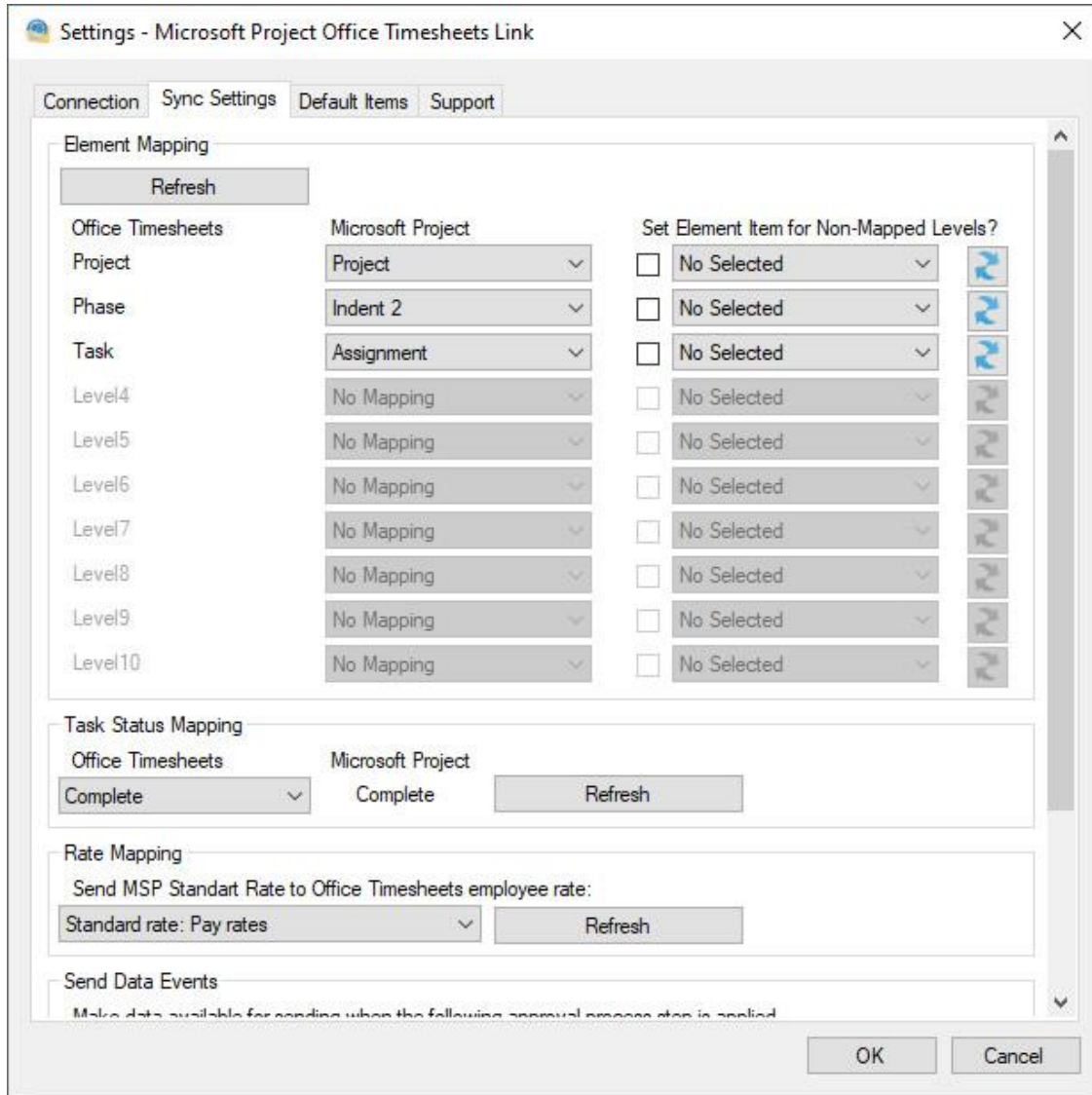
b. **(Optional)** Map a task status flag in Office Timesheets to Microsoft Project "100% Complete" flag. If a resource marks a task "Complete", for example, in Office Timesheet then the task will be updated as 100% complete for the assigned resource (not all assigned resources) upon the next sync.

c. **(Optional)** By default, each resource's standard rate is mapped to the task's properties in Office Timesheets. These rates can be easily hidden or shown based a user's assigned Security Policy. However, if you wish to sync a resource's standard rate to their employee record's standard rate field in Office Timesheets, then use the **Rate Mapping** drop down to do so. *NOTE: It's highly recommended that you only perform this mapping within one defined project sync, or other project syncs will override this rate. Or, if you wish to*

> *manage/maintain a special rate, not set or updated by the Microsoft Project sync, then be sure to retain the "No Selected" option.*

    d. **(Optional)** Use the Send Data Events drop down option if you wish to only sync time entry data from approved timesheets only. Note: If you do not configure the Send Data Events dropdown, then all time entries in Office Timesheets, regardless of whether or not they have been approved by a manager, will sync over to your defined project plan.

5. Next, click on the Default Items tab and configure your default settings.

    a. **Reporting Period** – choose a default Reporting Period whenever a new employee resource is added to Office Timesheets from the Microsoft Project Office Timesheet Link app.

    b. **Holiday Group** – choose a default Holiday Group whenever a new employee resource is added to Office Timesheets from the Microsoft Project Office Timesheet Link app.

    c. **Security Policy** – choose default Security Policy whenever a new employee resource is added to Office Timesheets from the Microsoft Project Office Timesheet Link app.

    d. **Employee Group Assignment** – choose a default employee group whenever a new employee resource is added to Office Timesheets from the Microsoft Project Office

Timesheet Link app.
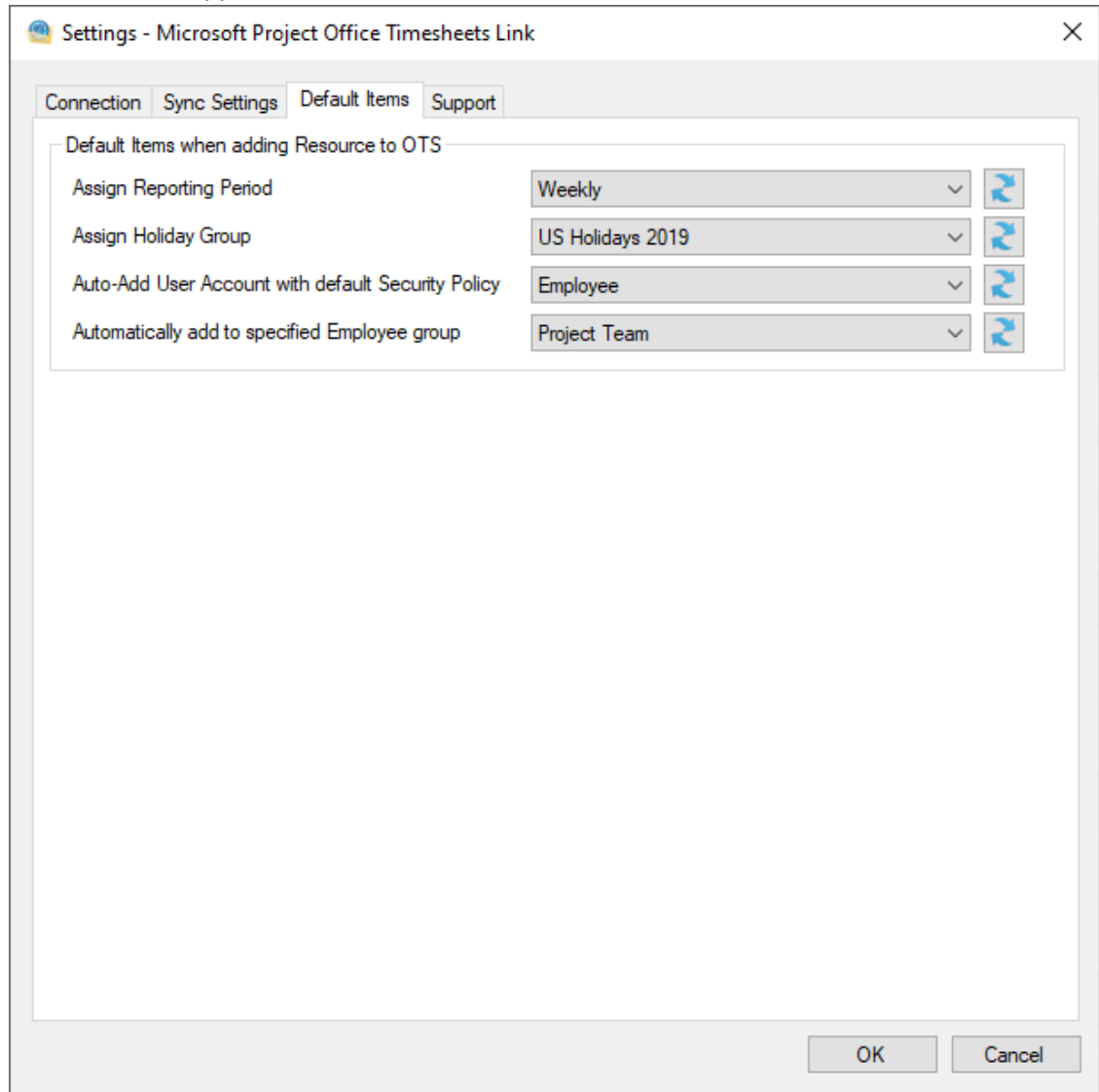
6. Click **OK** to save your Sync Settings for the specified project plan.
7. Press the **Receive Data Button** to initial your first sync of task and resource data from your specified project plan; or any time you wish to sync task and resource updates to your Office Timesheets database from your specified project plan…

Synchronization Log

```
11/12/2019 4:00:32 PM: Starting Receive Synchronization Thread...
11/12/2019 4:00:32 PM: Synchronization thread started.
11/12/2019 4:00:32 PM: Starting Sync. Version: 1.0.0.3
11/12/2019 4:00:32 PM: Sync Project Settings Name: 1. SoftSheets
11/12/2019 4:00:34 PM: Successfully connected to OTS: http://localhost/OTS/ProjectTest.login
11/12/2019 4:00:34 PM: Checking MS Project settings template SoftSheets with OTS.
11/12/2019 4:00:34 PM: MS Project settings template SoftSheets was checked with OTS.
11/12/2019 4:00:37 PM: Sending Employees to OTS
11/12/2019 4:00:37 PM: Sending Data to OTS by batches:8 item(s)
11/12/2019 4:00:37 PM:        Sending 8 item(s)
11/12/2019 4:00:37 PM:        Employee [Alexey A.] linked successfully
11/12/2019 4:00:37 PM:        Employee [Cindy Robertson] linked successfully
11/12/2019 4:00:37 PM:        Employee [James Bone] linked successfully
```

Enter hours against the tasks…

View Sheets	Import / Export	Reports	Process Management	Billing/Invoicing	System Configuration

			Day	Calculate Pay		Add Task &
Timesheet	Expenses	Timesheet Templates	Time Clock / Criteria / View Templates		Add Time Entry	Timer On / Timer Off / Delete Time

View

Timesheet View

Status: Overdue StartDate: 10/21/2019 EndDate: 10/27/2019   Leave as is ▾   Save   Status: Overdue StartDate: 1

Cindy Robertson	▾	◄◄ 10/21/2019 ►►	Mon 21 Oct	Tue 22 Oct	Wed 23 Oct
Project	**Phase**	**Task**			
SoftSheets	Testing	Security Testing ■	8.00	8.00	8.00
Ultra Fancy Steel Project	Plant Trials	Trial 4			

8. Press the **Start Send Data** button to sync hours entered against tasks for the specified Project plan in Office Timesheets to Microsoft Project file…

Here's an example of actual hours (Actual Work) synced over to a project plan from Office Timesheets…

To add other plans, click the **Add MSP Settings** button and add new sync settings for other project plans the same way you did for your first project plan (illustrated in the steps above).