



## **MS Project Integration Guide**

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# Introduction

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This document provides an overview of the MS Project integration for Oracle Instantis EnterpriseTrack. EnterpriseTrack MS Project Connector allows you to exchange project details between EnterpriseTrack and MS Project. The connector allows users to work offline and/or perform day-to-day project tracking using MS Project. Project managers can then periodically synchronize project information from MS Project with EnterpriseTrack. With this approach senior management and global teams access the central server environment with a browser, while project managers use their tool of choice (browser-based project tracking interface or MS Project desktop interface) to manage and track their projects.

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**Note:** The primary focus of the integration is with MS Project 2007. There are minor differences in the integration capabilities provided by the Connector to MS Project 2007 and MS Project 2010.

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# Document Conventions

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The following conventions are used in this manual to convey instructions and information:

The description of a menu item and its sub-items is described in this document as **(Page Menu) View > Toolbar > Display Print-Data Toolbar**, where you should click on the **View** Page Menu, then find the **Toolbar** sub-item and then click on the **Display Print-Data Toolbar** sub-item.

- ▶ Screen names and field names are in bold text.
- ▶ The actions you need to take on each screen are in bold text.

# Administration

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## MS Project Template

You can upload the MS Project template and add it to a roadmap from the **Administration** section of the EnterpriseTrack system. Only System Administrators can manage the MS Project template and can enable or disable MS Project integration for specific roadmaps. The MS Project integration flag is displayed on the **Project Roadmap** page.

The template helps preserve the look and feel of the MS Project file as defined by the Administrator. New projects are created using the roadmap (activity template) setup in EnterpriseTrack and the MS Project template provided. The tasks in the MS Project Template are also imported.

To enable MS Project Import/Export and to select a template file:

- 1) Navigate to the **Administration** module.
- 2) Select **Roadmaps**. The *Roadmap List* page is displayed.
- 3) Select the **[MS Project]** link associated with the roadmap you want to edit.
- 4) Select **Yes** to enable MS Project Import/Export.
- 5) Click the **Browse** button and select an MS Project template file.
- 6) Click **Update**.

## MS Project Template Usage

When a project is exported for the first time, if the project roadmap has an associated MS Project template, then the template is used to create a new MS Project file. If a template does not exist then the default MS Project template on the user's desktop is used to create the MS Project file. You can then make changes in MS Project and export to EnterpriseTrack. Along with task information, the MS Project file will also be uploaded to the server. When you export project information from EnterpriseTrack, the uploaded file at the project level (not admin level) will be used. This retains the look and feel of the MS Project file saved by the last Project Manager

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### Project Metadata

When a project is exported from EnterpriseTrack to MS Project, most of the information embedded in the uploaded MS Project file (or template) is retained. Project information such as custom fields, visible columns, column size/order, and embedded macros from the attached MS Project template are carried forward. The project calendar used in EnterpriseTrack is passed on to the calendar in MS Project. Milestone activities are also synced properly with MS Project milestone tasks.

### Project WBS/Assignments

When a project is exported from EnterpriseTrack to MS Project, task, resources and task-assignments from EnterpriseTrack are used to populate the MS Project file.

# Connection Mode

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### Online Mode

When you are online you can import/export project data from EnterpriseTrack/MS Project using the ET-XML interface file. Using the import/export options in the EnterpriseTrack UI, you can save the ET-XML file to your desktop or open it directly. MS Project is launched automatically and the contents of the file are processed to create the MS Project file.

### Offline Mode

While online, you can export a project from EnterpriseTrack and save it to your desktop. If you go offline, you can still use the saved ET-XML file, import it into MS Project and make changes as required. When you are online, you can then export the content from MS Project to EnterpriseTrack.

# Locking Projects

When a project is locked, no direct changes can be made to the project. For example, project team members cannot update their status or finance analysts cannot update project budget, etc. Project Managers can lock an active project if they do not want any changes to be made to the project. You can also lock projects that are complete to prevent further updates from being made. The project lock status is displayed on the project **Import/Export** page. If a project is **On-Hold**, you can only perform a **Read-Only Export**.

You can perform limited editing on the following items when the project is locked.

Entity	Locked	Allowed
Roadmap	All sections are read-only.	
Dates	All sections are read-only.	
Team—Resources	Most sections are locked.	You can add new team members.

Team—Allocation	You cannot release an allocation slot as it can result in deleting a team member.	You can edit the other sections.
Project Finances	Settings page is locked.	You can edit the other sections.
Allocation Approvals	Approvals that can result in deletions of team members.	You can edit the other sections.
Documents	The documents that are referenced in the activities are locked.	All other documents can be edited.

The following items are editable when a project is locked:

- ▶ Timesheets
- ▶ Metrics
- ▶ Notes
- ▶ Strategy
- ▶ Survey
- ▶ Issues
- ▶ Status Reports
- ▶ Non-WBS Items

## Mapping

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This section describes the mapping of data fields that take place during MS Project integration.

- ▶ Task Type in MS Project maps to Scheduling Mode in EnterpriseTrack.
- ▶ EnterpriseTrack to MS Project Mapping

EnterpriseTrack Planned Effort Type	MS Project Task type
Duration & Resource % Availability	Fixed Duration--non-effort driven
Effort at Activity Level -- Equal % Distribution	Fixed Work
Effort at activity Level -- Unequal % Distribution	Fixed Work
Effort at Resource Level: Summary	Fixed Work
Effort at Resource Level: Detailed	Fixed Work

- ▶ MS project to EnterpriseTrack Mapping

MS Project Task Type	EnterpriseTrack planned Effort Type
Fixed Duration -- non-effort driven	Duration & Resource % Availability
Fixed duration -- effort driven	Duration & Resource % Availability
Fixed units -- non-effort driven	Duration & Resource % Availability
Fixed units -- effort driven	Effort at Resource Level (Summary)
Fixed Work	Effort at Resource Level (Summary)

## Exporting Project Data

EnterpriseTrack allows you to export project data to and from MS Project. This functionality allows you to update your project data in MS Project. A series of steps have to be completed in sequence before you can export the project data. Before you begin exporting project data, do the following:

- ▶ Ensure that you have an MS Project template. This template is used when you export/import data from EnterpriseTrack. If no template is added, the default MS Project template is used.

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### Installing the Plug-In

To install the EnterpriseTrack plug-in for MS Project:

**Note:** This procedure needs to be done only once per client machine.

- 1) Navigate to the project **Import/Export** page by clicking the **Import/Export** link within a particular project.
- 2) Click the **Show** button next to Downloads.
- 3) Select the **Download EnterpriseTrack Plug-in for Microsoft MS Project Connector** link and save the file to your local drive.
- 4) Close all MS Project widows. Run the .exe file. This will install the plug-in on your machine. When you launch MS Project, you will see an **Oracle Instantis EnterpriseTrack** submenu under the **Tools** menu.

### Exporting Project Data

To export project data:

- 1) Navigate to the project **Import/Export** page by clicking the **Import/Export** link within a particular project.
- 2) Click the **Export Project data to Microsoft Project** link.
- 3) Select the type of export you want to perform: **Read-Only Export** or **Lock Project and Export**. **Read-Only Export** allows you to export the project to MS Project without having to import it back into EnterpriseTrack. If you lock a project, no changes can be made to the project. You can make changes only when the lock is released. The project lock status is displayed on the Project Import/Export page. If a project is On-Hold, you can only perform a Read-Only Export.
- 4) Click the **Read-Only Export** button or the **Lock Project and Export** button.
- 5) You can open the exported file or save it to disk. When you open the file, MS Project is launched and the exported project file is opened.
- 6) In MS Project, you can make changes to the project.

## Importing Project Data-Direct Option

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Before you begin importing data directly into EnterpriseTrack from MS Project, do the following:

- ▶ Ensure that you have a MS Project template. This template is used when you export/import data from EnterpriseTrack.
- ▶ Check if you have downloaded the latest version of the Oracle Instantis EnterpriseTrack plug-in for MS project.

To import project data using the direct option:

- 1) Launch MS Project on your machine.
- 2) In MS Project, from the **Tools** menu select **Oracle Instantis EnterpriseTrack > Export > To EnterpriseTrack**. *The Oracle Instantis EnterpriseTrack Login screen displays.*
- 3) Enter your login ID and password.
- 4) Check the **Release Project Lock** box to release the project lock and import.
- 5) Select the composition mode. By default, **External read-only** is selected. In this mode, the MS Project dates and costs are used.
- 6) Click **OK**. You will see a pop-up screen confirming that the data was successfully exported.

## Importing Project Data-File Option

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You can use the Import feature when you are ready to bring all your data into EnterpriseTrack. Before you begin importing data, do the following:

- ▶ Ensure that you have an MS Project template. This template is used when you export/import data from EnterpriseTrack.
- ▶ Check if you have downloaded the latest version of the Oracle Instantis plug-in for MS Project.

To import data using the file option:

- 1) Launch Microsoft Office Project on your machine
- 2) In MS Project, from the **Tools** menu select **Oracle Instantis EnterpriseTrack > Export > To EnterpriseTrack via File**. The plug-in saves the required data as a zipped XML file.
- 3) Save the file to a directory.
- 4) From EnterpriseTrack, navigate to the project **Import/Export** page by clicking the **Import/Export** link within a particular project.
- 5) Click the **Import Project data From Microsoft Project** link.
- 6) Check the **Release Project Lock** box to release the project lock and import. Leave the box unchecked if you do not want remove the lock.
- 7) Click **Browse**. Locate the file that you saved in Step 3.
- 8) Click **Import** to begin the import process. A confirmation message is displayed when the data is successfully imported. Your data can now be viewed within EnterpriseTrack.

## For More Information

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### Where to Get Documentation

For the most up-to-date versions of all manuals and technical documents related to installing, administering, and using EnterpriseTrack, go to:

[http://docs.oracle.com/cd/E50622\\_01/index.htm](http://docs.oracle.com/cd/E50622_01/index.htm)

You can also access the versions of the product manuals and technical documents that were available at the time of the release from the Documentation Library, click `index.htm` in the Documentation folder of the physical media or download.

Most documentation assumes a standard setup of the product, with full access rights to all features and functions.

The following table describes the core documents available for EnterpriseTrack and lists the recommended readers by role.


Title	Description
<i>EnterpriseTrack User Help</i>	Describes how to work with EnterpriseTrack and provides information to assist users with using EnterpriseTrack features.

Title	Description
	All users should read this Help.
<i>EnterpriseTrack Administrator's Help</i>	Describes how to work with EnterpriseTrack Administrator's console to manage your deployment and change various aspects of the application. EnterpriseTrack administrator should read this Help.
<i>EnterpriseTrack User Guide</i>	Guides users on how to use the EnterpriseTrack application. All users should read this guide.
<i>EnterpriseTrack Administrator's Guide</i>	Provides detailed information on using the EnterpriseTrack Administrator's console. EnterpriseTrack administrator should read this guide.
<i>EnterpriseTrack Dashboard and Reports Guide</i>	Provides detailed instruction on using the EnterpriseTrack Dashboards and Reports modules to generate dashboards, standard reports, ad-hoc reports and user-defined reports. All users should read this guide.
<i>EnterpriseTrack Quick Reference Guide</i>	Provides a quick introduction to common EnterpriseTrack tasks. All users should read this guide.
<i>EnterpriseTrack Installation Guide</i>	Provides information on how to install and configure EnterpriseTrack. EnterpriseTrack administrator, network administrator and database administrator should read this guide.
<i>EnterpriseTrack MSP Integration Guide</i>	Provides an overview of MS Project integration for EnterpriseTrack. EnterpriseTrack users who will perform MS Project integration should read this guide.
<i>EnterpriseTrack API Integration Guide</i>	Provides information that allows customers to customize an existing third-party integration. Developers interested in customization and existing third-party providers that integrate with EnterpriseTrack should read this book.
<i>EnterpriseTrack Upgrade Guide</i>	Provides a sequence of procedures that must be completed to upgrade to a new version of EnterpriseTrack. EnterpriseTrack administrator and database administrator should read this guide.
<i>EnterpriseTrack Tested Configurations</i>	Lists the configurations that have been tested and verified to work with EnterpriseTrack. EnterpriseTrack administrator, network administrator, and database administrator should read this guide.

Title	Description
<i>EnterpriseTrack Cumulative Features Overview Tool</i>	Provides an overview of features and enhancements included in the Oracle EnterpriseTrack product. It is intended solely to help you assess the business benefits of upgrading. All users should read this guide.
<i>EnterpriseTrack Security Guide</i>	Provides guidelines on how to plan your security strategy for EnterpriseTrack. All users, EnterpriseTrack administrators, network administrators and database administrators should read this guide.

### Distributing Information to the Team

You can copy the online documentation to a network drive for access by project participants. Each team member can then view or print those portions that specifically relate to his or her role in the organization.

Throughout this documentation, the Security Guidance icon  helps you to quickly identify security-related content to consider during the installation and configuration process.

## Where to Get Training

To access comprehensive training for all Primavera products, go to:

<http://education.oracle.com>

### Oracle Learning Library

The Oracle Learning Library (OLL) provides online learning content covering Primavera products. Content includes videos, tutorials, articles, demos, step-by-step instructions to accomplish specific tasks, and self-paced interactive learning modules.

To access the learning library's Primavera content, go to:

<http://www.oracle.com/goto/oll>

## Where to Get Support

### Access to Oracle Support

Oracle customers have access to electronic support through My Oracle Support. For information, visit <http://www.oracle.com/us/support/contact-068555.html> or visit <http://www.oracle.com/us/corporate/accessibility/support/index.html> if you are hearing impaired.

### Using Primavera's Support Resource Centers

Primavera's Support Resource Center provides links to important support and product information. Primavera's Product Information Centers (PICs) organize documents found on My Oracle Support (MOS), providing quick access to product and version specific information such as important knowledge documents, Release Value Propositions, and Oracle University training. PICs also offer documentation on Lifetime Management, from planning to installs, upgrades, and maintenance.

Visit <https://support.oracle.com/epmos/faces/DocumentDisplay?id=1486951.1> to access links to all of the current PICs.

PICs also provide access to:

- ▶ **Communities** are moderated by Oracle providing a place for collaboration among industry peers to share best practices.
- ▶ **News** from our development and strategy groups.
- ▶ **Education** contains a list of available Primavera product trainings through Oracle University. The Oracle Advisor Webcast program brings interactive expertise straight to the desktop using Oracle Web Conferencing technology. This capability brings you and Oracle experts together to access information about support services, products, technologies, best practices, and more.

For more information about working with Support, visit <https://support.oracle.com/epmos/faces/DocumentDisplay?id=888813.2>.

## Legal Notices

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Oracle Instantis EnterpriseTrack MS Project Integration Guide

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