Microsoft Project Integration Guide
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Introduction

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

> **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.

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 your desktop is used to create the MS Project file. You can then make changes in MS Project and export it to EnterpriseTrack. Along with task information, the MS Project file is also 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

> **Note**: If the admin template has tasks, they will be deleted.

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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. Project managers can lock an active project if they do not want any changes to be made to the project. Projects that are complete can also be locked 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.

The following items are editable when a project is locked:

- Metrics
- Notes

- Strategy
- Survey
- Issues
- Status Reports
- Non-WBS Items

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.

During MS Project Import/Export

During MS Project import or export, note the following items:

- **General**

  The internal mapping should not be changed. You cannot mark tasks as NA in MSP, but you can delete NA tasks in MS Project.

  You cannot change the currency in MS Project.

  If you change the mode from External to Internal in EnterpriseTrack, you can lose the data entered in the External mode for efforts/durations/cost.

- **MS Project Version**

  For the MS Project file to be opened by other users, you must save the file in the lowest compatible version of MS Project.

- **Summary Tasks**

EnterpriseTrack allows dates of summary tasks to be editable and does not calculate them from its child tasks. However, MS Project calculates summary task dates, which are read-only, from its child tasks. Therefore, MS Project always overrides the summary task dates provided by ET.

If child dates are not set, they are defaulted to the project start date, the duration is set to 1, and the end date is set to the same date as the start date. This rolls into summary task/phase as 1 day overriding any dates of summary tasks.

- **Dates**

  An error is displayed if the start date is modified in MS Project. You can only modify the project finish date in MS Project.

  After exporting to MS Project, you cannot have the start date of a child task be earlier than the start date of the parent task.

- **Activities**

  You cannot close the last top level activity in the MS Project. Use the close project/complete project to close or complete the project

  If you add new tasks in MS Project, EnterpriseTrack picks up the first available activity type and first sub type for those tasks that allow hierarchy during import to EnterpriseTrack from the set of available activity types at top level, or set of available activity type at other level depending on where the new task is getting added.

- **Resources**

  You cannot create new resources of type *Work* in MS Project. You can only use existing team members, or create material and cost resources.

  When importing to EnterpriseTrack, the first name and last name of the resource are not imported.

  When a resource is changed, additional information associated with that resource is not retained in EnterpriseTrack.

- **Effort**

  Planned overtime effort on a weekly basis is a read-only value in the MS Project and cannot be set. If PET is resource detailed data, then the planned overtime effort at the owner level is set directly. This might change the planned overtime distribution.

  For activities with AET set to timesheet or finances, the actual effort/cost is ignored when importing data back to EnterpriseTrack from MS Project

  If in EnterpriseTrack the Efforts cost mode is set to Internal, then the costs (planned and actual) will always be a multiplication of the corresponding effort in EnterpriseTrack. Any value edited in MS Project is lost when importing back to EnterpriseTrack.

  If in EnterpriseTrack the Efforts cost mode is set to External, then the costs (planned and actual) will always be taken from MS Project. Any value present in EnterpriseTrack will be lost, only MS Project values are preserved.

  If you change the PET or AET, you could lose data when the system recalculates the data based on the new PET/AET type.

  If an activity has AET as timesheet, when a timesheet gets approved the efforts are updated in the activity_resources and the activity_finances tables. In case the fintrack date and activity dates do not overlap completely, there could be mismatch between activity_resources and activity_finances.

Finance elements of type Timesheet Standard Effort or Timesheet Overtime Effort are never editable from the resource finances, they are editable in project finances if resource computation enabled flag is off

- **Permissions**

  Import MS Project permission overrides all other permissions.

- **Rates**

  MS Project does not give overtime cost in detailed mode and also does not allow it to be set. So the value going from EnterpriseTrack can change based on MS Project's calculations.

  MS Project does not allow setting overtime cost fields, so the value from EnterpriseTrack can change if MS Project changes the overtime cost.

  For resource type Work, the standard and overtime rates are ignored when reading data from MS Project.

  Changes made to the standard/resource calendar in MS Project are ignored during export to EnterpriseTrack.

- **Inter-Dependencies**

  Inter project dependencies are not exported.

Data Mapping for EnterpriseTrack and MS Project

The following tables describe the data exchange mapping between EnterpriseTrack and Microsoft Project. Although the data mapping between both products is as close as possible for the purpose of import/export, EnterpriseTrack was not designed to be another Microsoft Project. Therefore, some information may be lost when importing and exporting.

Important! Due to slight variations in how EnterpriseTrack and Microsoft Project calculate units and costs, values for units and costs may not be identical when exchanging data between EnterpriseTrack and Microsoft Project.

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Data Mapping During EnterpriseTrack Export

General

ET Field	MS Project Field
Currency Symbol	Symbol
Positive Currency Format	Placement X
Number of Decimal Places	Decimal digits

Scheduling Mode

ET Activity Schedule Mode	MS Project Task Type
Duration and % 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

Note: Scheduling Mode in EnterpriseTrack maps to Task Type in MS Project.

Calendar

ET Field	MS Project Field
Work Hours Per Day	Hours per day
Work Hours Per Week	Hours per week
Start Fiscal Year	Fiscal year starts in

Project

ET Field	MS Project Field
Project Name	Title
Comments	Comments
Default Project Calendar	Calendar

Cost

ET Field	MS Project Field
Team Member rate	Rate based (standard or overtime)
Equipment rate	Material (rate based) Cost Resource (cost)
Cost-planned_fixed	Fixed Cost
cost- planned_material	N/A
cost - actual_material	N/A

Resource

ET Field	MS Project Field
Et_tm_id	Text30
ET_user_id	Text29
ET_role_id	Text28
ET_role_name	Text27
ET_1nameET_fname	Name
Resource type (person or equipment)	Type (work= person or equipment)
Resource calendar	Resource Calendar

Activity Dates

ET Field	MS Project Field
Baseline_start_date	Baseline Start
Baseline_completion_date	Baseline Completion
Baseline_duration	Baseline Duration
Planned_completion_date	N/A
Planned_duration	Duration
Actual_start_date	Start Actual Start
Actual_completion_date	N/A
Actual_duration	Actual Duration
Planned_duration	N/A
Actual_duration	N/A

Activity

ET Field	MS Project Field
Name	Name
Comments	Notes
Activity_id	Text30
% completion	% completion
Owners	Owner
Activity marked NA	Text29 is set to NA_Closed
WBS Code	WBS
Milestone	Milestone
Critical tasks	Tasks are critical if slack is less than or equal to 0 days.

Notes:

- For open activities, the % completion is set by EnterpriseTrack. For completed activities, the % completion is set to 100%. For NA activities, the % completion is explicitly specified.
- Based on the scheduling mode, EnterpriseTrack sends either the duration or the completion date.

Data Mapping During EnterpriseTrack Import

Scheduling Mode

MS Project Task Type	ET Activity Schedule Mode
Fixed Duration - non effort driven	Duration and % resource availability
Fixed Work	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)

Note: Scheduling Mode in EnterpriseTrack maps to Task Type in MS Project.

Calendar

MS Project Field	ET Field
Hours per day	Work Hours Per Day
Hours per week	Work Hours Per Week
Fiscal year starts in	Start Fiscal Year

Cost

MS Project Field	ET Field
Fixed Cost	Planned_non_resource_fixed_cost
Actual Cost	Actual_non_resource_fixed_cost
Cost	Planned_non_resource_material_cost
Actual Cost	Actual_non_resource_material_cost
Cost	Planned_non_resource_other_cost
Actual Cost	Actual_non_resource_other_cost

Notes:

- The Planned Total Cost in EnterpriseTrack is the non resource planned cost plus the resource planned cost.

- The Actual Total Cost in EnterpriseTrack is the non resource actual cost plus the resource actual cost.
- The Actual Non Resource Fixed is Cost is the actual cost minus resource cost (person and material) and actual cost for all child activities.

Task

MS Project Field	ET Field
Baseline start	Activity dates -baseline_start_date
Baseline Completion	Activity dates -baseline_completion_date
Baseline start	Activity dates- baseline duration
Start	Activity dates- planned start date
Finish	Activity dates - planned completion date
Plan duration of task	Activity dates- planned duration
Start date of task	Activity dates - actual start date
Actual finish of task	Activity dates-actual completion date
Actual duration of task	Activity dates- actual duration
Plan duration of task	Owner dates- planned duration
Actual duration of task	Owner dates-actual duration
% Complete of task	Percent_completion
Actual work (of resource)	Actual_total_effort
Work (of task)	Planned_total_effort
N/A	Baseline_effort

Uploading MS Project Template

Using a MS Project template helps preserve the look and feel of the MS Project file as defined by your administrator. The tasks in the MS Project Template are also imported. You can upload the MS Project template and add it to a roadmap from the EnterpriseTrack **Administration** module. Only 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. New projects are created using the roadmap setup in EnterpriseTrack and the MS Project template provided.

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

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

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, 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.
5) 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) Select 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.

Importing Project Data

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Importing Project Data-Direct Option

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 computation mode. By default, **External read-only** is selected.
   Internal: EnterpriseTrack computes the dates, effort, and cost.
   External read-only: The calculation for dates, effort, and costs come from MS Project. Project Managers cannot edit the values in EnterpriseTrack.
   External read-write: The calculation for dates, effort, and costs come from MS Project. Project Managers can change the values in EnterpriseTrack.
6) Click **OK**. You will see a pop-up screen confirming that the data was successfully exported.

Importing Project Data-File Option

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, select the **Import/Export** link within a particular project.
5) Click the **Import Project data From Microsoft Project** link.
6) Check the **Release Project Lock** checkbox to release the project lock and import. Leave the box unchecked if you do not want to remove the lock.
7) Click **Browse**. Locate the file 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

Complete documentation libraries for EnterpriseTrack releases are available on the Oracle Technology Network (OTN) at:

http://www.oracle.com/technetwork/documentation/default-1956119.html

From this location you can either view libraries online or download them to have local copies. We recommend viewing them from OTN to ensure you always access the latest versions, including critical corrections and enhancements.

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

Help System Access

EnterpriseTrack is configured to access its help system directly on OTN. However, a downloadable version of the help system is also available on OTN if you need to download, deploy, and access a local copy.

Documentation Accessibility

For information about Oracle's commitment to accessibility, visit the Oracle Accessibility Program website at http://www.oracle.com/pls/topic/lookup?ctx=acc&id=docacc.

Access to Oracle Support

Oracle customers that have purchased support have access to electronic support through My Oracle Support. For information, visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=info or visit http://www.oracle.com/pls/topic/lookup?ctx=acc&id=trs if you are hearing impaired.

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/oll/primavera

Where to Get Support

If you have a question about using Oracle products that you or your network administrator cannot resolve with information in the documentation or help, click http://support.oracle.com. This page provides the latest information on contacting Oracle Global Customer Support, knowledge articles, and the support renewals process. For more information about working with Support, visit https://support.oracle.com/epmos/faces/DocumentDisplay?id=888813.2 to view **Support Tools & Tips**.

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.

Creating a Service Request

EnterpriseTrack integrates with different Oracle applications; when you create a Service Request, be sure to open the request with the proper Support team. To ensure you reach the proper Support team, enter the correct product information when you create the Service Request. Each product has its own support line.

- Use the **Instantis EnterpriseTrack** support line when you are having installation, configuration, or connection issues related to EnterpriseTrack.

- Use one of the following support lines when you are having installation or configuration issues that do not relate to EnterpriseTrack:
  - Oracle WebLogic Server
  - Oracle Database Server
  - BI Publisher
  - Oracle Access Manager

Keeping Your Software Up to Date

To ensure you have the latest versions of your products, be sure to download and install all available patch sets from http://support.oracle.com.

Finding Security-related Patches

To get the latest information about Critical Patch Updates, visit http://www.oracle.com/technetwork/topics/security/alerts-086861.html.

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Oracle Instantis EnterpriseTrack Microsoft Project Integration Guide

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