



Journyx Projectlink version 8.7

Journyx Projectlink User's Manual

Journyx ® Projectlink™ Version 8.7

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Printed in the U.S.A.

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Overview

Introduction

Journyx Projectlink™ is a robust, bi-directional integration between Journyx Timesheet™ and Microsoft Office Project®.

Timesheet is a powerful system for tracking project actuals and monitoring project status across the entire enterprise—giving you a clear view into project and non-project time and expenses.

Projectlink provides you with the ability to ensure that **critical project data**—such as actual project time worked or—**can be synchronized with your Microsoft Project system** to keep project plans up-to-date.

About This Manual

This manual contains installation and configuration instructions to help you establish connectivity and synchronize data between the two applications. This manual is part of the documentation included with Projectlink, and you can find it in the same folder where Projectlink is installed (this location is noted in the installation instructions section of this manual).

A discussion of best practices or helpful tips is marked by a  symbol.

System Requirements

Projectlink must be installed on a PC that has a fully-functional version of Microsoft Project Standard or Professional 2002 or later (referred to henceforth as “Project”). Projectlink and Project can reside on a separate PC or server from your Timesheet server. In fact, this is recommended for optimal performance. Projectlink does not support Microsoft Project Central.

Understanding Synchronization Using Projectlink

Reasons to Synchronize

Journyx Timesheet gives project team members and managers an interface for tracking detailed project actuals at any time from any location. It provides project managers with accurate, up-to-date status for resource management, project coordination and cost control. Team members can enter time in only one system, rather than making multiple time entries (such as entering time for project tracking in one system and entering non-project and exception time in another system for payroll or finance). For all these reasons, Timesheet is a great system for managing project execution.

However, some organizations are already using Microsoft Project for project tracking. While they may choose to manage some work exclusively in Timesheet, they may want to maintain more complex project plans within Project. Your organization can use Timesheet without giving up what you already have within Project. Synchronizing data between the two systems—using Journyx Projectlink—allows you to reap the distinct benefits of both.

Benefits of Using Timesheet with Project

Timesheet is the best system for managing project *execution*—in particular, for managing actual work. It can provide easier access to project and resource information for more people in your organization than may be practical with your Project system. There are a few things, however, that you may wish to continue doing in Project. The main benefit of maintaining a project plan in your Project system comes from Project's sophisticated scheduling engine. That makes Project a good system for planning and managing project schedule dates, and performing "what if" analysis of a project schedule. For that reason, using Projectlink to synchronize data between the systems can be very useful.

A general rule of thumb is to use each system for what it does best. Timesheet helps you manage "*who is actually doing what*" in your project. You can know the actual work that has been done and report actual project status to stakeholders. Project is better at project schedule planning, allowing you to estimate *when* projects or tasks might complete.

How Synchronization Works

When you use Projectlink to synchronize data between Project and Timesheet, the common data between the two systems gets updated intelligently in both. Timesheet is the only system in which you enter actual time worked against projects. The actual time-worked data stored in Timesheet can be synchronized back into Project to update project schedules you may wish to manage in the Project system.

You will have some choices to make about synchronization at the overall project level, depending on your particular project management needs. It also helps greatly to understand which system's data are authoritative at the field level. What happens during synchronization at the project level and the field level is described below.

How Projectlink Creates Projects and Users by Synchronization

Project organizes projects into a hierarchy of summary tasks and subtasks (also sometimes called parent tasks and child tasks). In some cases, a project is a master project, whose summary tasks are actually subprojects with tasks and subtasks of their own. To each task, you can assign one or more resources (project team members) to perform the work. The unique assignment of a resource to a particular task is called a “task assignment”.

When you first synchronize a Project file, Projectlink will create in Timesheet a hierarchical tree of projects corresponding to the tree of projects/tasks in the Project file. The file’s resources will appear as users in Timesheet, and their task assignments will be translated into Timesheet Group memberships. In Timesheet, Group memberships determine what users can see and log time against—including Project-assigned tasks and other non-assignment based work (e.g., overhead/clerical). Users will not see (and so can not log time against) tasks to which they are either *not* assigned or to which they do not have Group access. In this way, synchronization creates new Timesheet projects and users with the right set of role-based permissions to log time against only their Project-assigned tasks.

How Projectlink Handles Projects and Users Created Directly in Timesheet

Projectlink may be synchronizing data for projects and users that it already knows about (those loaded by synchronization), and perhaps some that it does not know about (those created directly in Timesheet).

Projects

If you created a project directly in Timesheet, that system is assumed to be authoritative for that scheduled project’s data. Therefore, that project’s data—with its task hierarchy and group memberships—can not be transferred into Project by synchronization to create a new Project file. If you want to manage any portion of your projects in Project, you must create the initial project plan in Project and synchronize it with Timesheet.

Users

You may have created users directly in the Timesheet system, and not by synchronization with Project. Projectlink handles users differently from projects; it assumes that a user could be assigned to both Timesheet-managed projects and MSProject-managed projects.

Hence, when you synchronize, Projectlink will notice any resource in the Project file that matches an existing user in Timesheet. It will ask—and allow you to choose—whether the user will be given the proper permissions within Timesheet to see and log time against those project tasks in the Project file.

Any user in the Timesheet system may be granted access to both MSProject-managed data, and Timesheet-specific data (like time-off projects, for example).

Determining Which System Controls Individual Fields

If you plan to synchronize data between Project and Timesheet, you must know which of the two systems is considered authoritative for certain data at the field level. There are logical one-to-one correspondences which associate certain fields in Project with specific fields in Timesheet. After synchronization, the authoritative system’s data will populate the associated fields in the other system.

The most important thing to know is this: Timesheet is always authoritative for the data residing in these two project fields:

- The **Actual Work** field
- The Assignment Notes field

The *Actual Work* field in Project corresponds to the *Actual Hours* field in Timesheet. The *Assignment Notes* field in Project corresponds to the *Time Entry Comments* field in Timesheet. Previous notes to the assignment added directly in Project are not deleted, but the comments transferred from Timesheet will be added to the existing Assignment Notes.

Actual Hours in Timesheet are derived from people logging actual time worked against project tasks; hence, it must be authoritative. However, it is possible to transfer Actual Work from Project to Timesheet for projects in process prior to implementation of Timesheet.

The *Time Entry Comments* field allows Timesheet users to log note entries into text box fields on their individual timesheets via the Time tab; any note associated with logging time to a task is considered authoritative.

The full list of corresponding fields can be found in this manual (see “Appendix A: Field Correspondences Between Timesheet and Project”).

Ensuring Field-to-Field Data Transfer

Because synchronization of data happens at the field level, the field names in Project and Timesheet must be configured correctly for transfer.

Project files have different views; many are a matrix of fields arranged in columns and rows. Often, field names match the title of the column in which the fields appear for convenient reference. **However, it is very important to understand the difference—in Project—between a field name and a column title.** Even though a column title may default to match the field name, it is not the same thing as the field name.

Even though you may specify a new column’s title at the time you insert the column (by entering text into the “Title” box of the Column Definition window), it does **not** change the underlying field name that you selected (like “Text1”). For example, you can title or re-title a column “JX Login,” but fail to change the actual *field name* to “JX Login”—the underlying field name could easily remain “Text1”.

That is why the fields within a Project text, number, or date column must be *renamed*, so that the underlying field names will be changed. It is not sufficient to simply change the title of the column in the event you want to transfer the field data to Timesheet.

To change field names for all fields within a column:

- Right-click on the column’s header row or go to the Tools menu.
- Choose “Customize Fields...”
- Click the “Rename” button and rename the fields to match the Timesheet field’s name exactly.

Understanding Project File Registration

How Projectlink Registers Project Files

Before you decide among the various synchronization options, you need to understand how Projectlink **registers** Project files with Timesheet. By registering each file, Projectlink can recognize files and pass information back and forth properly.

To register a Project file, Projectlink assigns a unique identifier—called a “*jxid*”—to the file at the time it is first successfully synchronized. You can find the *jxid* for any Project file (assuming it has been successfully synchronized at least once) by opening the File menu, selecting the Properties option, then moving to the Custom tab. It is an alpha-numeric value, displayed next to the *jxid* name.

After you have synchronized data from a Project file into Timesheet, you will see the Project file’s *jxid* number in the project name in Timesheet. It will also be the value in the *MSP File ID* field for the project. If your resources are included in the same Project file as the project plan, the same *jxid* number will appear in the Timesheet *MSP File ID* field for users. If, on the other hand, you store your resources in a separate Project file exclusively for resources (a “Resource Pool” file), the *jxid* specific to the resource pool file will appear in the Timesheet *MSP File ID* for users.

Managing Your Registered Project Files

Each Project or Project Resource Pool file can only be registered with Timesheet once. ***Because each Project file receives a *jxid* number as a new file property, it is very important that you save the Project file after the initial synchronization and always use the saved version for future synchronizations. It is important that you do not keep additional copies of the file either on your machine or your network that might be synchronized by mistake in place of the registered file.***

If you attempt to synchronize a Project file with the same file name as one already registered in the Timesheet system, Projectlink will not allow the sync and will present an error indicating a file by the same name already exists in the Journyx system. For that reason, it is critical that you do not keep multiple same-name copies of any one Project file. If you make changes to a duplicate file without the *jxid* information, you risk having to reproduce all your changes in the original file.

If you keep both a production and a test site for Timesheet, it is important to keep your Project files separate for each site. Journyx recommends that you store each set of files in different directories on your machine or network. It is also advisable to distinguish these files from one another by using naming conventions (e.g., “Resource Pool” for your production system file, and “Resource Pool Test” for your test system file).

Saving your Project files after every synchronization is critical to keeping the two systems in sync. If you synchronize—but do not save—a Project file before closing it, you will lose the Actual Work data you just transferred into the file. Failing to save changes to Actual Work in your Project file will result in discrepancies between the two systems because Timesheet will only transfer an approved time record once.



In the event that this occurs, please contact Journyx Support for help in getting the systems back into sync.

Using Projectlink with Microsoft Project Server

There are several things you need to understand if you are using Projectlink with Microsoft Project Server, rather than only with the desktop version of Project.

A mix of local and enterprise resources is not supported. Projectlink allows you to create new users in Timesheet by synchronization. For the desktop version of Project, it does so by transferring resources included directly in project plans or resource pools.

Creating users in Timesheet by synchronization works differently if you are using Project Server; all resources you intend to transfer by synchronization must be Enterprise Resources prior to synchronizing. When synchronizing with a Project Server installation, a separate resource pool is not necessary. Resources assigned to Enterprise Projects registered on Project Server are automatically transferred to Timesheet with the appropriate access, assuming that they are properly set up for synchronization. See "Prepare Fields in Both Systems" for details on making files ready for synchronization.

Understand whether you need to enforce Project file publication to the Server. Project files which have been published to a Project Server are called Enterprise Project files. Enterprise Project files can be checked out in read-write mode and edited locally. The existence of both local and Enterprise Project files for the same project can cause some confusion as to which version of a Project file is considered final or authoritative—the local copy, or the Enterprise Project file. If your organization intends that the only Project files considered final or authoritative shall reside on the Project Server, then you must enable the proper settings within Timesheet to enforce the practice. See "Preparing for Synchronization" for more information.

Projectlink Installation and Setup

This section assumes that your organization has already successfully installed Timesheet v7.9 or higher (or is accessing a Journyx-hosted system). It also assumes that you have installed a supported version of Microsoft Office Project on a local PC or Terminal Server.

Important: You must have administrator privileges for the Windows computer on which you will be installing Projectlink. If you do not, please contact your own IT department to arrange for these privileges. Without these privileges, Microsoft security settings will cause the installation to fail.

Installing Projectlink on a Local PC

Projectlink will be installed on the local PC or server where your Project installation resides. If an older version of Projectlink already exists on that same PC or server, you will need to remove it before you run the Projectlink installer file, as per Step 1, below. If you are installing Projectlink for the first time, you may skip to Step 2.

Step 1: Remove Older Versions of Projectlink

- Use the Add/Remove Programs feature in the Windows Control Panel to remove the older version of Projectlink (a restart may be required depending on your machine configuration).
- Verify removal by checking C:\Program Files\Journyx (or wherever your Journyx programs were installed). If the Projectlink folder is still present,

delete the folder and then empty the Recycle Bin. More information is available on removal tips in the Projectlink FAQ which can be found in your Projectlink installation directory or on the Windows Start Menu under your Projectlink folder.

Step 2: Get the License Key and Installer File

- Locate the projectlink.zip file download link and Timesheet license key provided by your Journyx account representative at time of purchase.
- Apply the Projectlink-enabled license key to your Timesheet installation per the instructions provided. Without the key, certain preferences in Timesheet will not be available, and you will not be able to run synchronizations.
- Download the projectlink.zip file.

Step 3: Run the Installer File

- Extract the Projectlink executable file from the projectlink.zip file.
- Run the .exe file to launch the installer, which will automatically install Projectlink on your local PC or server. The Projectlink installer will also install the required version of Microsoft® .NET if it isn't already installed on your PC or server.
- By default, Projectlink will install to C:\Program Files\Journyx Projectlink, and a Projectlink shortcut will be added to your desktop.

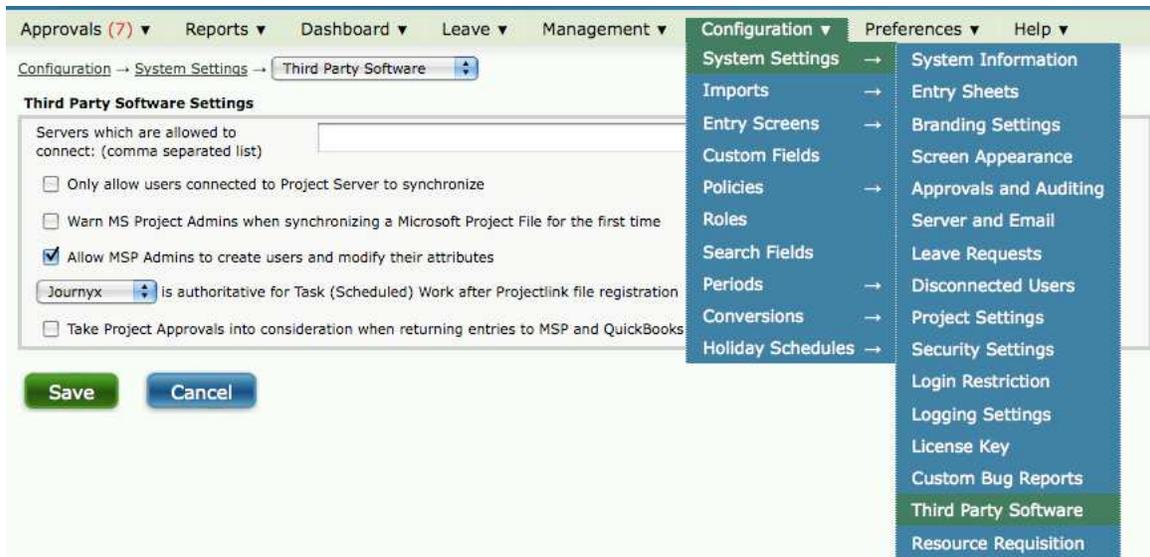
Preparing for Synchronization

Before you begin performing synchronization of the two systems, you will need to take some preparatory steps. First, you will prepare Timesheet at the system level for the synchronization process. Then, you will make preparations at the field level in each system to ensure data transfer.

Prepare the Timesheet System

Step 1: Open the Third Party Settings Panel

- Log in to Timesheet as an Administrator
- Go to Configuration→System Settings→Third Party Software (if the link is missing, you do not have a license key that will allow synchronization with Project) to display the Third Party settings panel:



Step 2: Set Your Preferences

Servers which are allowed to connect

This option applies only to Project Server, and not to the desktop version of Project. If you are using the desktop version, you can leave this field blank. Here, you can control which Microsoft Project Server installations are allowed to synchronize to this installation of Timesheet. Enter a comma-separated list of servers into the text entry field. *NOTE: If the field is left blank, and "Only allow users connected to Project Server to synchronize" is selected, no servers will be authorized to synchronize.*

This preference can help eliminate duplicate synchronizations, as may occur when the same server can be accessed by different naming conventions. As an example, `http://testprojectserver` can also be accessed as `http://10.1.1.1`. Entering "testprojectserver," but not "10.1.1.1," ensures that project files on the server will not get synchronized to Timesheet twice—one copy for each server name.

Only allow users connected to Project Server to synchronize

This option applies only to Project Server, and not to the desktop version of Project. When checked, this preference allows the Timesheet administrator to restrict local Project files not published to Project Server from being synchronized. Choosing this option restricts any user from synchronizing files unless he is logged into, and accessing the file from, a Project Server. Leaving this preference unchecked allows any user with a Project administrator-level account to connect and synchronize regardless of file location.

Deciding whether or not to set this preference depends on your organization's procedures and policies regarding which Project files are considered authoritative. In some organizations, local files are considered to be drafts unless and until they are published to the Project Server.

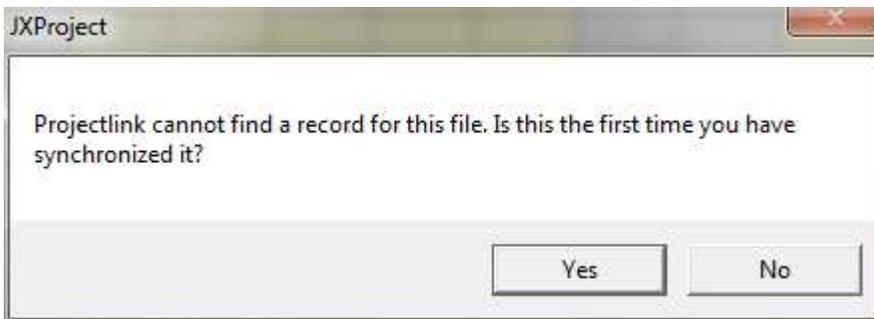
If this option is selected, and the user is not connected to a Project Server, the following dialog box will appear:



Warn Project Admins when synchronizing a Microsoft Project file for the first time

This preference is helpful for Project files that were once synchronized locally (with a desktop version of Project), but now are published to the Project Server. It is an important preference to consider if you do not enable the "Only allow users connected to Project Server to synchronize" preference described immediately above.

If this preference is checked, a synchronizing user will be warned that the project does not exist in Timesheet and asked whether this is the first synchronization (see example below):



If the project file has been previously synchronized to this installation of Timesheet, the proper response is "No." If you respond "No," you will be prompted to enter the *jxid* of the file.



See "How Projectlink Registers Project Files" for more information on the *jxid*.

Allow MSP Admins to create users and modify their attributes

Checking this preference allows anyone with the MSP_Admin role in Timesheet to trigger the creation of new users in Timesheet automatically by synchronization, and to modify their attributes. A new user will be created whenever a resource exists in the Project file whose *JX Login* field value does not match any known user logins in

Timesheet. If this option is selected, *only* users with the MSP_Admin role will be allowed to create new users and update their attributes. If a user has the MSP_User role, he will be allowed only to associate existing users in Timesheet with matching user logins in the Project file.

Take Project Approvals into consideration when returning entries to MSP and QuickBooks

Timesheet can be configured to handle two types of time entry approvals: time-period approvals, and project-level approvals. Period approvals apply to a user's timesheet for the given time period (often, weekly). Project-level approvals can also apply. For project-level approvals, a project manager can approve each time entry made against any project they manage.

Check this preference to ensure that any Timesheet time entry records subject to the project-level approval process must be approved at that level before they will be transferred, even if the period approvals are complete. When Timesheet is configured without project approvals, or when this selection is not checked, records will be transferred when all period approvals are complete. If project approvals are also being used, you can select this button to keep records from being transferred until all period and project approvals are complete.

Step 3: Create an MSProject Admin Account in Timesheet

Projectlink requires at least one Timesheet account with the MSProject Admin ability. The MSProject Admin role account must be a **separate** account from the Timesheet Administrator. You cannot create this or any other administrator-level accounts in Timesheet by synchronization; you must do it directly within the application.

You can give project managers or other responsible parties the ability to sync MS Project files using Projectlink by including the MSProject Admin ability in their Timesheet roles. You can either use control+click on the user modification screen to assign a user to more than one default role, including the MSProject Admin role, or you can build a custom role with a custom set of abilities that includes MSProject Admin. Please see the Timesheet documentation for information on creating custom roles.

To create a dedicated account for Projectlink syncs:

- Login to Timesheet as an Administrator
- Go to Management→Users→Create User
- Enter the login ID and name information for the new account
- Select MSProject Admin as the role for the new account
- Click the Save button

Please Note: The MSProject Admin user role is license key enabled. If you do not see this user role in the list of available roles, please contact Journyx to acquire a license key that enables this role.

You do not need to select approval templates for the user having this account. Because users with the MSProject Admin role do not enter time, mileage or expenses in Timesheet, they do not need approval processes.

Users with the MSProject Admin role should not have any other roles in the Timesheet system, because this account is really for Projectlink's use. The account having this role can't log into Timesheet directly from its login screen.

Prepare Fields in Both Systems

Data transfer at the field level requires the presence of certain corresponding fields in each system, properly named. Some fields are pre-existing in the two systems; others are new fields that will need to be created. (Note that only administrator-level users can create fields in Timesheet.)

Step 1: Add *JX Login* and *JX Role* Fields for Each Resource

For proper synchronization, Projectlink requires that two fields—*JX Login* and *JX Role*—exist for each project resource listed in a Project or Resource Pool file. A resource must have a value present in each of these two fields in order to be transferred properly to Timesheet. (Timesheet will ignore resources that do not have values in these two fields.) You will need to insert two new columns to provide each resource with a *JX Login* and a *JX Role* field.

To insert the columns:

- Open the Project or Resource Pool file that you will be synchronizing with Timesheet.
- Switch to Resource Sheet view, if necessary.
- Right click on the sheet's column header row. From the pop-up menu, choose "Insert Column."
- You will see the column definition window. Its "Field Name" drop-down list contains a number of items representing the different types of fields that Project uses. The Text1 through Text30 items allow you to add custom text fields to the sheet. Select any text field from Text1 through Text30 and click OK. Rename the fields within this newly inserted column by right-clicking the column, selecting Customize Fields... then clicking the Rename button. In the Rename text entry box, Type in "JX Login" (without the quotes) and click OK.
- Repeat this process a second time—insert a new column, and rename its fields "JX Role" (without the quotes) and click OK.
- Please note: Take care to select one of the Text1-30 items when you add a new column. Renaming fields that are **not** a text field type will not work properly during synchronization.
- If you are using Project Server, Enterprise Text Fields can be used instead. Your Project Server administrator must add these fields to the Enterprise Global Template prior to synchronization.
- Please also refer to "Ensuring Field-to-Field Data Transfer" for more information about field names.

Step 2. Enter *JX Login* and *JX Role* Values for Each Resource

You can create new users in the Timesheet system by synchronization.

Therefore, the value you enter in the *JX Login* field for each resource should be the login name you intend the resource to use when accessing Timesheet (jsmith, johns, or John.Smith, for example).

If you are synchronizing a file with resources who are already existing users in Timesheet, the values in their *JX Login* field must exactly match their usernames in Timesheet. If they do not match, Projectlink will be unable to properly create their assignments in Timesheet.

In the *JX Role* field for each resource, enter the role you intend that resource to have in the Timesheet application.

Timesheet has a set of default roles that include:

- User
- Manager
- Project Manager
- Reporter

You may see other roles in addition to these. For example, if your organization has purchased the Timekeeper optional module, a "timekeeper" role will be available. If you have the Custom Roles module, you may enter the name of a custom role you have created using that module.



Your Timesheet Implementation Team will guide you in choosing the right user roles during configuration of your Timesheet system.

The role name should be entered in lowercase text. If you want to assign two or more roles to a single individual, list all of the roles with a pipe symbol (|) between each one.

Projectlink will not synchronize any resource with a role that includes Administrator authority. To create a Timesheet administrator account, you must do so in the Timesheet application—you will not be able to create it by synchronization. Journyx has intentionally disallowed this ability to maintain strict system security for our customers.

Step 3: Identify Any Other Resource and Task Fields That Should Transfer

You may have created new fields in Project by inserting ***new resource or task field*** columns. You can transfer these field values into Timesheet. The value in any text, number, or date field in Project on a Resource Sheet, Gantt Chart or similar views can transfer to Timesheet into custom user fields (for resources) and custom project fields (for tasks). Note the field name of each resource or task field you wish to transfer because the corresponding fields in Timesheet will be created (if needed) in a later step. The new fields can be basic text, select list, date, or number fields. For select list fields, please note that all list values in Project and Timesheet must match exactly (these values are case-sensitive).

The ***Email Address field*** already exists in both programs. If the field is not already present, insert a new column on the Resource Sheet, selecting the Field Name *Email Address*. Verify that the correct email address is entered for each resource. If the *Email Address* column exists (and is not hidden) on the Resource Sheet, any email address values that already exist in Timesheet will be overwritten by the values in the Resource Sheet upon synchronization.

By default, Project ***Task Notes*** field values are transferred to the *Project Description* fields in Timesheet. However, you may populate the Timesheet *Project Description* fields from a custom Project Task text field by renaming the field *jx description*.

See "Ensuring Field-to-Field Data Transfer" for important information on renaming fields.

Step 4: Flag any Project Tasks that should not be Synchronized

Tasks may be excluded from transfer into Timesheet by inserting a flag field column into the Gantt Chart or Task View (or any other view where you can add the column to the Task) in Project. The flag field name must be "Exclude Task" (singular, no quotes). Please refer to "Ensuring Field-to-Field Data Transfer" for more information about inserting columns and naming fields.

To exclude a task from transferring into Timesheet, select "Yes" in that task's *Exclude Task* field. Any tasks that have been newly flagged for exclusion after they have previously been transferred during synchronization will be changed to "Hidden" status within Timesheet if they have actual records associated with them. If there are no records in Timesheet, the task will be removed entirely. Hiding or excluding a task does not hide or exclude its children.

Step 5: Check Actual Work Field Display

Project must be set to display the "Actual Work" field if you wish to see the actual work hours that are transferred from Timesheet. The actual work values will be transferred whether you display the field or not, but it is helpful to be able to see them.

Step 6: Save Your Project File

IMPORTANT: You must save your Project file before synchronizing with Timesheet.

Step 7: Ensure Custom Fields Exist in Timesheet

If you created any custom fields in Project (see Step 3, above), the field data will not transfer unless there are corresponding Custom Fields in Timesheet. *The field names in Project and Timesheet must match exactly, or data will not transfer.*

A Custom Fields panel exists for each user and project in Timesheet. Although Timesheet provides a number of fields in this panel by default, you can create new ones. To permit data transfer, any new resource field you created in Project must have a corresponding *user* Custom Field in Timesheet; any new task field requires a corresponding *project* Custom Field.

If a corresponding field does not exist in Timesheet, you will need to create it. To create new custom fields in Timesheet, you must be logged in as an Administrator. From the Configuration>>Custom Fields tab, select "User" or "Project" from the dropdown menu in the upper right corner, then click the Create button.

Synchronizing Journyx Timesheet and Microsoft Office Project

You may synchronize individual, stand-alone Project (.mpp) files, or you may synchronize Resource Pool files and then their corresponding Project Sharer files.

The Importance of Time Entry Status

Your project team members will use Timesheet to track their time worked on projects. Those time entries will be synchronized back into Project so that the project plan can be updated with actuals—the amount of time actually spent to date on tasks and projects.



In the Timesheet system, time entries must be in either a "committed" or "approved" state in Timesheet before they will be transferred back to Project during synchronization.

Approvals occur if period and/or project approval plans are being used. When all appropriate approvals are complete, the associated records are eligible for synchronization to Project. If approval plans are not used, hours can be committed by a Project Manager or Administrator in Timesheet via Standard Reports or Records Management (in the Time Entry Modification screen under the Management >> Records Management tab). Committing records as a means to flag records for transfer to Project is not recommended unless your Journyx Implementation team has determined the process is a good fit for your organization. The two methods for marking records as ready for synchronization (approval plans versus record commit) should not both be used in the same system.

Running a Synchronization

Before running any synchronization, ensure that both systems, as well as the file you are about to synchronize, have been properly prepared (see "Preparing for Synchronization").

Step 1: Enter Information About This Synchronization

Open Project, then open the Project file you wish to synchronize. Open Projectlink using either the desktop shortcut or the Start menu for programs. The first time you run Projectlink for a particular Project file, the synchronization window will be blank; it will ask for the following information:

MS Project File Path

This field is filled in automatically based on the active MS Project file that is open. If no file is open, you can open your file and click on refresh to fill in this field.

Journyx server

In this text box, enter the URL to the Timesheet server you will synchronize. This URL may be entered either as a standard name-based path, DNS or as an actual IP address (i.e., timesheet.company.com or 123.123.123.123)

Port

Here, enter the port number on which the Timesheet service runs. If your organization is running Timesheet on a specific port, enter that port number here; otherwise enter the default port value of 80. If your site's URL displays a number after the server name, that number is the port number. For example if your login URL looks like <http://pxserver:8080/jtime>, then your port is 8080. If your server is SSL enabled (secure browsing—the URLs are prefaced with "https" instead of "http"), enter port number 443

User name

Enter the login ID of the user with the MSPProject Admin account who will be performing this synchronization. The MSPProject Admin account was created above in Step 4. Login IDs and passwords are case-sensitive in Timesheet.

Password

Enter the password for the MSPProject Admin or MSPProject User account of the Project file manager who is performing this synchronization. Note that Login IDs and passwords are case-sensitive in Timesheet.

Synchronization Properties

The **Bring back actuals** option should be checked whenever you wish to transfer actual time-worked to Project. When transferring large numbers of records from Timesheet to Project, a session may last quite some time; therefore, some organizations choose to transfer time-worked actuals no more than once a week. However, during the week, Tasks, Resources, and Assignments may be updated in Project, and you may wish to update the information in Timesheet by synchronization. In this or similar cases where you merely need to push data *from* Project *into* Timesheet, you need not incur the overhead of returning the actuals to Project at that time.

The **Send legacy actuals from MSP** option is for project plans already in progress at the time they are added for tracking in Timesheet. This setting allows you to transfer existing "legacy" actual work from Project into Timesheet. Most of the time, you can not transfer actual work values from Project to Timesheet, since Timesheet is authoritative for actual work. However, legacy actuals may be transferred from Project, but only at one particular time—at the time the file is first registered during the initial synchronization with Timesheet. Thereafter, actual work can only be transferred in the other direction—from Timesheet to Project.



Legacy actual work in Project will NOT transfer successfully unless a resource has been assigned to the task.

The **Set tasks to Reportable when 100% complete** option will automatically prevent time (actual work) entries against tasks in Timesheet that are 100% complete (actual work=work) in Project. The option is important, because Timesheet doesn't, by default, restrict time entries against tasks that are 100% work-complete. You can turn this option on or off at any time for any project file. By setting the completed tasks to "Reportable," Timesheet allows you to report on those tasks, even though time entries have been disallowed.

The **Assign unassigned hours to** selection list option is only available for Journyx ProjectXecute and does not apply to integration with Journyx Timesheet.

Task Loggability options allow you to control the timeframe for which projects in Timesheet will be open for time entry:

The **Use Exact MSP Schedule** option will restrict the logging of time worked on tasks/projects in Timesheet to only the dates and times that the tasks/projects are explicitly scheduled in Project (i.e., November 4, 2004 until November 15, 2004). During that time, the tasks/projects will show the status "Loggable and Reportable". All other tasks/projects will have the status "Reportable Only," meaning that users will not be able to see or log time against these tasks/projects (although the time data would be available for reporting purposes).

The **Task Grace Period** option allows you to specify a number of days before and after task dates in Project, during which the tasks will be open for logging time worked (meaning they have a status of "Loggable and Reportable") in Timesheet. This is useful in the case that you have a Task that is open for one week, and your users either start the Task early or enter their time into Timesheet after the completion of the task.

The **Always Open** option sets all tasks for a file to “Loggable & Reportable” status in Timesheet regardless of the individual schedules. It allows users to see and log time against all the tasks to which they are (or have been) assigned at any time during the project. Users will see only the tasks to which they have been assigned, even though all tasks in the system will have Loggable and Reportable status.

Task Loggability options do not affect the transfer of actuals back to Project. If the actuals are approved (or committed), and they have not been transferred in the past, they will transfer during the sync, if you have checked the “Bring back actuals” option in Projectlink.

Closing a task in Project will *not* close the corresponding task in Timesheet until you synchronize. If you close a task in Project today, but do not synchronize the Project file for 5 days, that task will remain open and visible to Timesheet during the entire five days.

Step 2: Start the Synchronization

Once you have entered the required information and option selections, you can either click on the Preview button to review the summary counts of what will be transferred or skip the preview and Synchronize. After clicking on the Synchronize button, you will see the synchronization status as it progresses.

Step 3: If Asked, Tell Projectlink About the Users in This Project

At times, Projectlink may ask you about any Project file resources who match users that already exist within Timesheet.

It may tell you that the users “have no MSP ID but match logins in this project,” which means that these users have been created in Timesheet, but the logins assigned match resources in this Project file. Alternatively, it may tell you that the users “have a different MSP File ID but match logins in this project”, which means that these users are (or were previously) associated with another Project file. In either case, Projectlink will display a list of the users in question then ask: “Would you like to associate them with this project?”

You should answer “Yes” **ONLY** if:

- You are synchronizing a Project Resource Pool file,
- You do not keep a central file for resources in Project and add them manually to each project file, or
- You are syncing a file registered to your Project Server. If the file has been synchronized locally prior to being published to the Project Server, you may be asked for the file’s *jxid* number (see “How Projectlink Registers Project Files” for more information on the *jxid*).

Step 4: Confirm the Data and Finish the Synchronization

If you choose the Preview option, information about the data being synchronized, such as:

- Number of Tasks
- Number of Resources
- Number of Assignments

Click the Synchronize button to continue the synchronization process. Projectlink will display the Close button when the synchronization is finished. You can either close Projectlink or view more information about the most recent sync by clicking on the Report button.

Synchronizing Resource Pools and Sharer Files

This section describes the process of synchronizing Timesheet with a Project Resource Pool file, which contains resources that are assignable to other Project files (called *sharer* files). You will synchronize the Resource Pool file before you synchronize the individual sharer files.

Understanding Resource Pools and Sharer Files

If your company's projects share any project team members, using a Project Resource Pool file can help you avoid assignment conflicts if you monitor cross-project assignments in Project. If you do not use Project to monitor resource assignments to other project files or plan to use ProjectXecute for this purpose, please skip to the next section for "Synchronizing Project Files with Own Resources".

Resource Pool files are easy to create and use. Most often, they are simply a Project file that is blank, save for the resource information. You can prepare and synchronize a Resource Pool file like any other Project file. Project Sharer Files are Project files that use shared resources from the Resource Pool file. When you use a Resource Pool, Project will notify you when resource assignments conflict, and allow you to resolve the problem.

See your Project help file for more information on creating and using Resource Pool and Sharer files.

Step 1: Synchronize the Project Resource Pool file with Timesheet

- Ensure that the file is properly prepared (see "Prepare Fields in Both Systems").
- Open the Project Resource Pool file for editing (the synchronization will fail if the file is read-only).
- Run the synchronization (see "Running a Synchronization").
- Once the synchronization is complete, save the Resource Pool file.
- The only time that this file will need to be synchronized in the future is in the event a new resource/user is added to the Resource Pool file.

Step 2: Synchronize the Project Sharer Files with Timesheet

- Ensure that the file is properly prepared (see "Prepare Fields in Both Systems").
- Save the Project file with the Resource Pool still open.
- When synchronizing the sharer file, keep the Resource Pool file open. Unlike when synchronizing the Resource Pool file itself, when you synchronize sharer files the Resource Pool file can be open in read-only mode.
- Run the synchronization (see "Running a Synchronization").
- After the synchronization is complete, save your Project files.

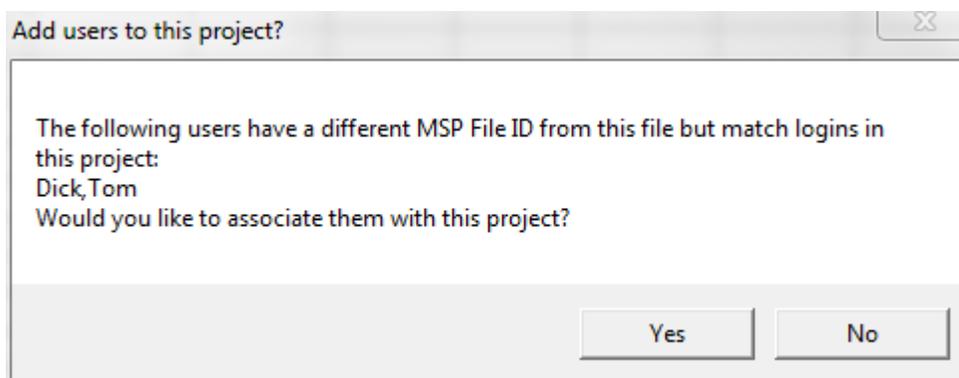
- Repeat these tasks for each subsequent Project sharer file that you wish to synchronize.

Synchronizing Project Files with Own Resources

If you are not assigning resources from a centrally located Resource Pool file, you will need to add the required resources to each Project file. Adding resources to every new project plan may be a little more time consuming, but it gives the project manager more freedom make file updates without having to be connected to a centrally located Resource Pool that all project managers can access. Resource availability and conflicts can be checked in ProjectXecute both before and after a Project file is synced to the system.

If you have resources that will be assigned to more than one Project file, Projectlink will require you to associate them with each file when you sync. This ensures that actual work for the correct Project file is transferred.

By way of example, let's assume that an organization is not using a resource pool file. Let's also assume that both John and Scott have Project files, and that each of their files contains task assignments for the same resource. Scott synchronizes his file first. When John synchronizes somewhat later, the following notification appears:



If John clicks "Yes," Projectlink will check for Work and Actual Work for his file. When Scott syncs again later, the same notification will appear, and he will click "Yes" to check for the values that apply to his file.

After each synchronization of a Project file, you **MUST** save the file in order to preserve the changes. Failure to save a file after sync could result in loss of data and manual work to get the two systems back in sync.

Synchronizing Master Project Files

Project managers often use master Project files that contain subprojects; each sub-project is also contained in its own separate Project file (which can be linked to the master file). Master project files are synchronized in the same way as individual project sharer files. If you choose to synchronize your project files in a master file, you should not then synchronize the files individually. In other words, do not synchronize an individual project file if it is included in a master file that will be synchronized.

Ongoing Synchronizations

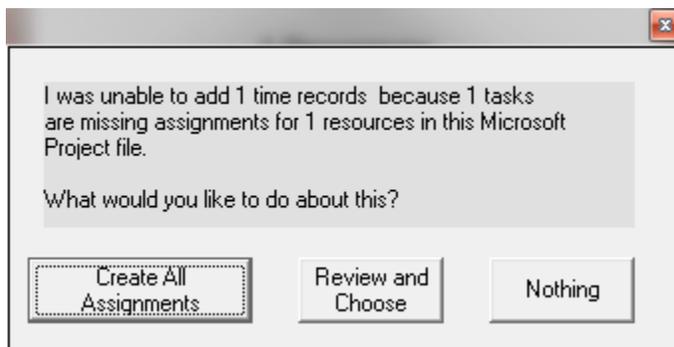
After you have made changes or added data to either your Project files or your Timesheet system, you should synchronize the two by following the steps described in this manual. It is good practice to synchronize often, so that you have up-to-date information in both systems.

Tracking Time in Timesheet Without an Assignment in Project

As your project progresses, resources may sometimes log time against tasks to which they were not assigned in Project because you have chosen to give them Group access to the task in Timesheet. Perhaps you simply haven't yet created the assignment in Project. You may also intentionally leave some tasks unassigned so that they can be "grabbed" on a self-serve basis. Allowing Projectlink to create missing assignments in Project can help you detect approved time records that have been logged against tasks without a corresponding assignment in Project. This can be helpful if you suspect the time was logged to a task erroneously.

In Timesheet, a user can enter time against tasks to which he is not actually assigned if he belongs to a Group that has access to the tasks (you can learn more about Timesheet's Groups feature in its help file). Occasionally, time entries may be in error if Groups are not configured correctly. Groups also serve to offer tasks on a first-come, first-served basis. Whether a time entry to an unassigned task is intentional or in error, Projectlink will notify you that you are missing an assignment for the time records in question. During the synchronization, you will be notified that there are approved user time records in Timesheet that do not correspond to existing assignments in Project. You have the option to create all of the missing assignments in Project without review, or you can review and select them individually for creation in Project.

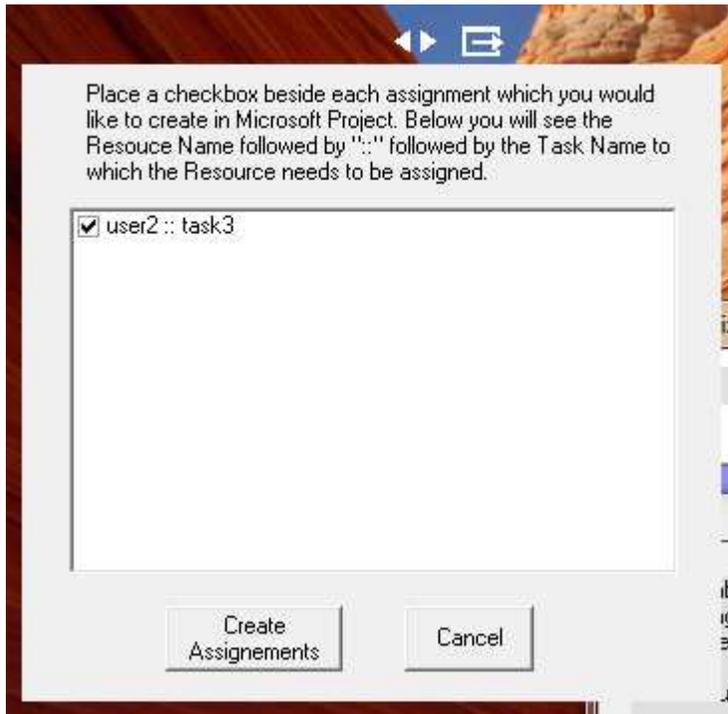
An example of the window displaying these options is shown below:



This window refers to a "time record". In Timesheet, data are stored in time records; Projectlink uses these data records when synchronizing.

To allocate the time records to the tasks as actual work in Project, you can approve creation of the missing assignment. When you approve, the missing assignment is created in Project. If the records were entered incorrectly against the wrong task, you can leave the missing assignment unselected and correct the records in Timesheet to reflect the correct tasks/users.

Select Create All Assignments if you wish to transfer all new Timesheet time entries to Project. Select Nothing if you do not wish to create the assignments--you'll be prompted again the next time you synchronize, unless you delete the approved time records in Timesheet. Select Review and Choose to display the list of assignments you may choose for creation in Project (illustrated in the example below):



Here, select the assignments you wish to create, and click the Create Assignments button.

Appendix A: Field Correspondences Between Timesheet and Project

<u>Authoritative Field</u> (Data transfers from here...)	<u>Receiving Field</u> (... to here)
Microsoft Project Field	Journyx Timesheet Field
Project (the actual file name)	Project (under Project Management)
Summary Task	Child Project (under Project Management)
Task	Child Project (under Project Management)
Work Breakdown Structure (WBS)	Beginning of Project Name
Task Notes	Project Description ¹
Resource	User
Assignment	Projectlink Group
Custom text field of your own creation	Custom User or Project Field (provided that the field names match)
Exclude Task (flag field)	(If set to "yes," task will be excluded from transfer)
Task Start/Finish Dates	Project MS Project Start/End Dates
Task Work	Project Total Estimated Hours
Journyx Timesheet Field	Microsoft Project Field
Actual Work ²	Actual Hours
Comments	Assignment Notes

¹ By default, Project **Task Notes** field values are transferred to the *Project Description* fields in Timesheet. However, you may populate the Timesheet *Project Description* fields from a custom Project Task text field by renaming the field *jx description* (see "Ensuring Field-to-Field Data Transfer" for important information on renaming fields).

² All actual work values being synchronized will come from Timesheet, with the exception of actual work logged in Project prior to implementation of a Timesheet system. Should you wish to transfer that prior actual work into Timesheet, there is an option to send existing actual work from Project to Timesheet when a file is first synchronized. The prior actual work values will only transfer on the first synchronization of the file.