

Microsoft Project Online Link to Office
Timesheets

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Using the Microsoft Project Online Link to Office Timesheets

Office Timesheets includes direct two-way integration with Microsoft Project Online. In summary, Office Timesheet will allow a user to sync task assignments stored in a Microsoft Project Online project plan, populate user's timesheets with their task assignments, and send the time spent on those tasks back to the project plan as Actual Work.

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

How data is transferred between Office Timesheets and Microsoft Project Online

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

Time is then recorded by the employee against those tasks, and is then sent back to the Microsoft Project plan as Actual Work, to update the assignments with the employee's progress.

How data is transferred from Microsoft Project Online to Office Timesheets

As mentioned above, assignments from a Microsoft Project plan are extracted and placed on employee timesheets. Data from each Microsoft Project plan that is synced into Office Timesheets is mapped to fields in Office Timesheets based on the structured data hierarchy of Microsoft Project plans and your Office Timesheets database. This concept is quite simple once you have a basic understanding of how task hierarchies in Microsoft Project and Office Timesheets work.

Understanding Microsoft Project Task Hierarchy

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

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

Understanding Office Timesheets' Task Hierarchy

Office Timesheets uses a similar type of hierarchical relationship for structuring tasks called Element Levels. However, the element hierarchy within Office Timesheets is not as “freeform” as it is in Microsoft Project. Office Timesheets’ task hierarchy is defined by its Element Level structure, which can include a total of 10 tracking levels. The Office Timesheets administrator is responsible for defining the number of levels in which will be tracked, each level’s name, and the hierarchy (or order) of those Elements Levels. In the example shown below, this particular Office Timesheets database has a total of four (4) element levels defined for tracking purposes (not including the Employee/Resource).

Activate Element	Name
Employee	Employee
<input checked="" type="checkbox"/> Level 1	Client/Cost Center
<input checked="" type="checkbox"/> Level 2	Project/Job
<input checked="" type="checkbox"/> Level 3	Phase
<input checked="" type="checkbox"/> Level 4	Activity
<input type="checkbox"/> Level 5	
<input type="checkbox"/> Level 6	
<input type="checkbox"/> Level 7	
<input type="checkbox"/> Level 8	
<input type="checkbox"/> Level 9	
<input type="checkbox"/> Level 10	
Expense	Expense

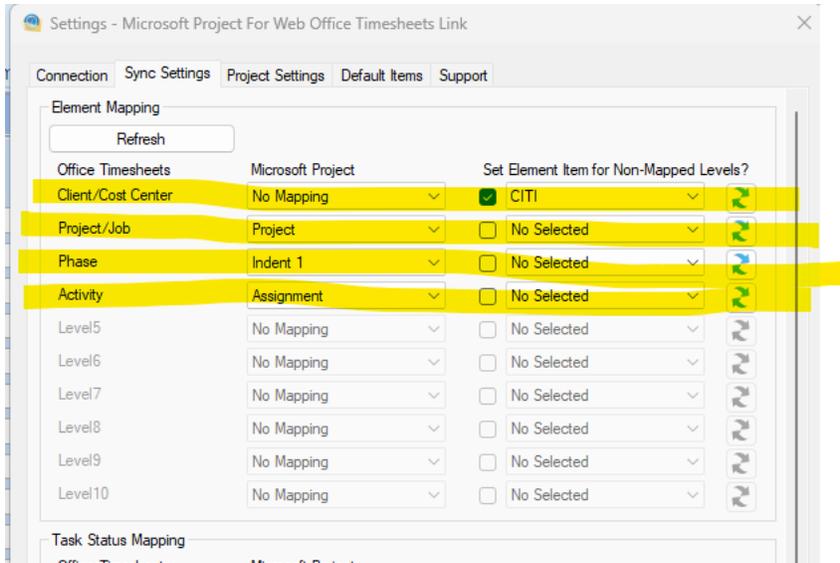
Item lists are then maintained for each defined element level within Office Timesheets. For example, a list of clients, projects, phases, activities, and so on...

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

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

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

For logical reasons, task data in Office Timesheets and task data in Microsoft Project is structured somewhat differently. However, Office Timesheets’ project link configuration allows you to map the unique structure of each of your Microsoft Project plans to your Office Timesheets database element hierarchy so that data flows between the applications in a logical way.



In fact, you can have two or more project plans with different task hierarchies and still map them properly to Office Timesheets as sync settings can be configured to map each Microsoft Project plan, separately. Based on the mapping shown in the previous screenshots, task data from the specified Microsoft Project file will link up the following way:

MS Project	Office Timesheets
Project Name	Project
Indent 1	Phase
Assignment	Activity

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

How data is transferred back to Microsoft Project Online from Office Timesheets

When an employee (resource) has entered time against task assignments synced from Microsoft Project Online to appear on their timesheet, Office Timesheets can send the time entry data back to Microsoft Project Online, as Actual Work, to update your project plan. This allows the project management team to see the actual progress of their project plan and compare it with the original schedule.

Using the Microsoft Project Online Link to Office Timesheets App

To get started with syncing your Microsoft Project Online plans with Office Timesheets you'll first need to download and install the [Microsoft Project Online Office Timesheets Link app from here](#), if you haven't done so already. To start the Microsoft Project Online Office Timesheets Link app, click the Windows Start menu; open the Microsoft Project Online Office Timesheets Link folder; and then click on the application **Microsoft Project Online Office Timesheets Link ...**

*NOTE: The Microsoft Project Online Timesheets Link app always runs in the background once started. Thus, if closed, you can re-open the application by right-clicking on the application in the Windows Task menu; and selecting **Open**.*

One-Time Microsoft Azure Configuration

In order to sync Office Timesheets with your Microsoft Project Online account, a one-time configuration in your company's Microsoft Azure Control Panel is necessary. The user that performs this configuration will require administrative privileges to your company's Microsoft Azure Portal.

If you are already using Azure AD Auth for OTS, then skip steps 1, 4 and 5. and start from step #2 of these instructions, where you'll need to add a Redirect URL to the existing application that you are using for Azure AD/EntraID Authentication in Office Timesheets. And, then continue the to the next steps for the existing application.

1. To configure **OTSMSPROjectOnlineSync** for connection to **Microsoft Project Online (PWA)** you'll need to adjust OTS Password Options – by registering the application and adjusting some items. To do this, log into your Azure Control Panel; and to to **App Registration -> New registration**.

Microsoft Azure Search resources, services, and docs (G+) Copilot

Home > App registrations

+ New registration Endpoints Troubleshoot Refresh Download Preview features Got feedback?

Starting June 30th, 2020 we will no longer add any new features to Azure Active Directory Authentication Library (ADAL) and Azure Active Directory Graph. We will continue to provide technical support and security updates but we will no longer provide feature updates. Applications will need to be upgraded to Microsoft Authentication Library (MSAL) and Microsoft Graph. [Learn more](#)

All applications Owned applications Deleted applications

Start typing a display name or application (client) ID to filter these r... Add filters

This account isn't listed as an owner of any applications in this directory.

[View all applications in the directory](#)

2. Create/Register a new application that will be used by OTS...

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Home > App registrations > Register an application

* Name

The user-facing display name for this application (this can be changed later).

OTSMSPROjectOnlineSynd

Supported account types

Who can use this application or access this API?

Accounts in this organizational directory only (Single tenant)

Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant)

Accounts in any organizational directory (Any Microsoft Entra ID tenant - Multitenant) and personal Microsoft accounts (e.g. Skype, Xbox)

Personal Microsoft accounts only

[Help me choose...](#)

Redirect URI (optional)

We'll return the authentication response to this URI after successfully authenticating the user. Providing this now is optional and it can be changed later, but a value is required for most authentication scenarios.

Select a platform e.g. https://example.com/auth

Register an app you're working on here. Integrate gallery apps and other apps from outside your organization by adding from [Enterprise applications](#).

By proceeding, you agree to the [Microsoft Platform Policies](#)

[Register](#)

3. Add a Redirect Url to the application...

The screenshot shows the Microsoft Azure portal interface for an application registration named 'OTSMSPProjectOnlineSync'. The 'Essentials' section is expanded, displaying various application details. A red arrow points to the 'Add a Redirect URI' link under the 'Redirect URIs' section.

Property	Value
Display name	OTSMSPProjectOnlineSync
Application (client) ID	[Redacted]
Object ID	[Redacted]
Directory (tenant) ID	[Redacted]
Supported account types	My organization only
Client credentials	Add a certificate or secret
Redirect URIs	Add a Redirect URI
Application ID URI	Add an Application ID URI
Managed application in local directory	OTSMSPProjectOnlineSync

4. Add a "Web" platform...

The screenshot shows the Microsoft Azure portal interface for the 'Authentication' section of the application registration. The 'Configure platforms' section is expanded, showing options for adding platforms. A red arrow points to the 'Add a platform' button, and another red arrow points to the 'Web' application type under 'Web applications'.

Platform configurations
Depending on the platform or device this application is redirect URIs, specific authentication settings, or fields specified.

Supported account types
Who can use this application or access this API?
 Accounts in this organizational directory only (Local accounts)
 Accounts in any organizational directory (Any Microsoft accounts and guests)
[Help me decide...](#)

Web applications

- Web**: Build, host, and deploy a web server application. .NET, Java, Python
- Single-page application**: Configure browser client applications and progressive web applications. Javascript.

Mobile and desktop applications

- iOS / macOS**: Objective-C, Swift, Xamarin
- Android**: Java, Kotlin, Xamarin

5. Fill in the redirect Url from Office Timesheets and Configure...

The screenshot displays the 'Configure Web' interface in the Microsoft Azure portal. The left sidebar contains navigation links such as 'Overview', 'Quickstart', 'Integration assistant', 'Diagnose and solve problems', 'Manage', 'Branding & properties', 'Authentication', 'Certificates & secrets', 'Token configuration', 'API permissions', 'Expose an API', 'App roles', 'Owners', 'Roles and administrators', and 'Manifest'. The main content area is titled 'Configure Web' and includes sections for 'Redirect URIs', 'Front-channel logout URL', and 'Implicit grant and hybrid flows'. The 'Redirect URIs' section contains a text input field with the URL 'http://localhost/OTS_80017/Pages/3PAAuth/AzureAccessTokenAuth.aspx' and a green checkmark icon. A red box highlights this input field. Below the 'Redirect URIs' section, there are checkboxes for 'Access tokens' and 'ID tokens'. At the bottom of the page, there are three buttons: 'Save', 'Discard', and 'Configure'. A red arrow points from the 'Configure' button in the 'Redirect URIs' section down to the 'Configure' button at the bottom of the page.

NOTE: The Redirect URL should correspond to the special OTS page link that can be found in OTS on the Password Option Page here (System Configuration -> Accounts/Policies -> Password Options):

The screenshot shows the 'System Configuration' page with the 'Accounts/Policies' section selected. The 'Use for usernames and passwords' section is expanded, showing 'Office Timesheets' as the selected Windows domain name. Below this, there are password options and authentication settings via Azure Active Directory. The 'Redirect URI (Access Token)' field is highlighted with a red box.

Use for usernames and passwords

Office Timesheets (selected)

Windows domain name: [text input]

*Note: You should configure IIS manually if you want Windows Authentication to work properly.
*Note: Your current name - admin

If using Office Timesheets for Accounts and Passwords

Require combination of numbers and characters:

Minimum character length of passwords: 0

Maximum length of passwords: 14

Create random password for User Accounts:

Authentication Settings via Azure Active Directory

Enable Azure AD:

Use User Principal Name as Azure ID:

Tenant ID: [text input]

Application (client) ID: [text input]

Client secret: [text input]

Domain: Global

Redirect URI: http://localhost/OTS_80017/Pages/3PAuth/AzureAuth.aspx

Redirect URI (Access Token): http://localhost/OTS_80017/Pages/3PAuth/AzureAccessTokenAuth.aspx

Redirect URI OTS Mobile: http://localhost/OTSMobile_80017/Login

6. Assign "SharePoint" permissions to the created Application.

Permission can be assigned automatically upon creation of the application. However, you'll need to ensure the permissions are correct. The following permissions should be added:

Microsoft Azure

Search resources, services, and docs (G+)

Copilot

Home > App registrations > OTSMSProjectOnlineSync

OTSMSProjectOnlineSync | API permissions

Search Refresh Got feedback?

- Overview
- Quickstart
- Integration assistant
- Diagnose and solve problems
- Manage
 - Branding & properties
 - Authentication
 - Certificates & secrets
 - Token configuration
 - API permissions**
 - Expose an API
 - App roles
 - Owners
 - Roles and administrators
 - Manifest
- Support + Troubleshooting

Granting tenant-wide consent may revoke affected. [Learn more](#)

The "Admin consent required" column shows in your organization, or in organizations

Configured permissions

Applications are authorized to call APIs when all the permissions the application needs. [Learn more](#)

[+](#) Add a permission [✓](#) Grant admin consent

API / Permissions name	Type
Microsoft Graph (1)	
User.Read	Delegated

[To view and manage consented permissions](#)

Request API permissions

Select an API

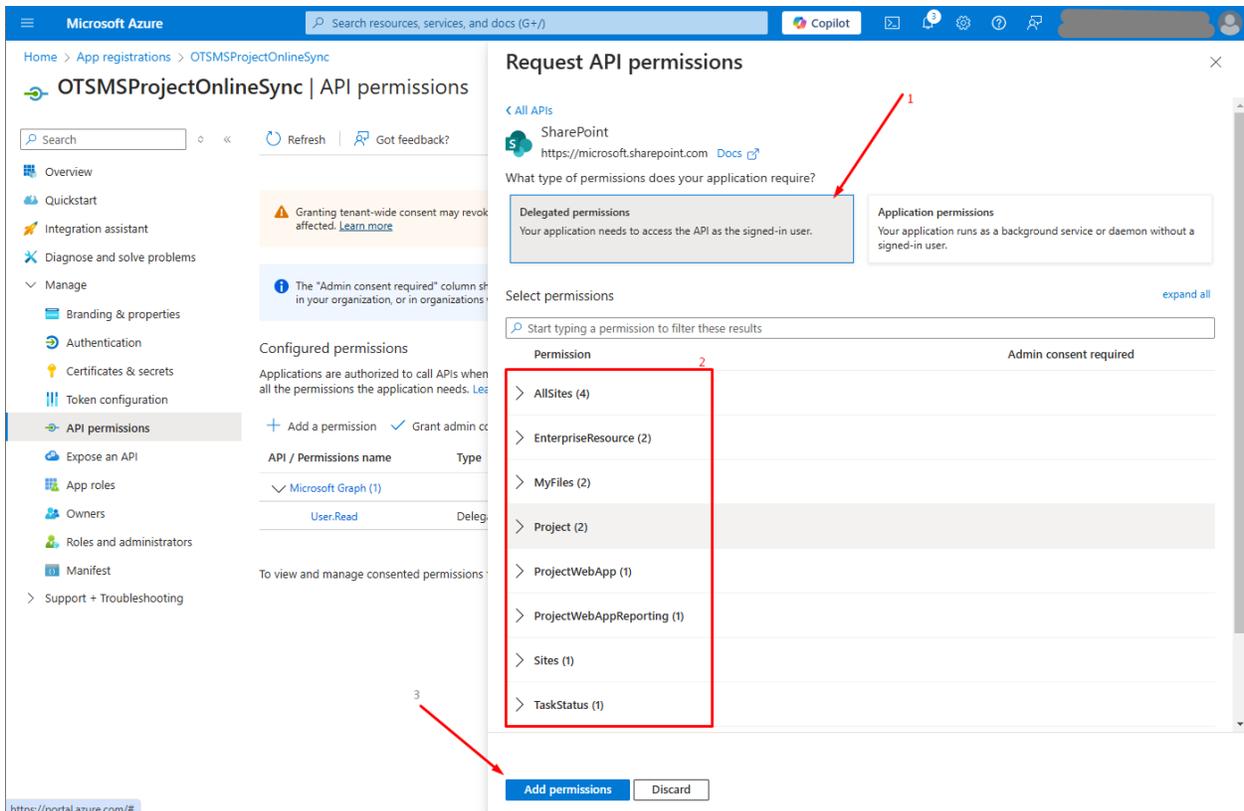
Microsoft APIs APIs my organization uses My APIs

Commonly used Microsoft APIs

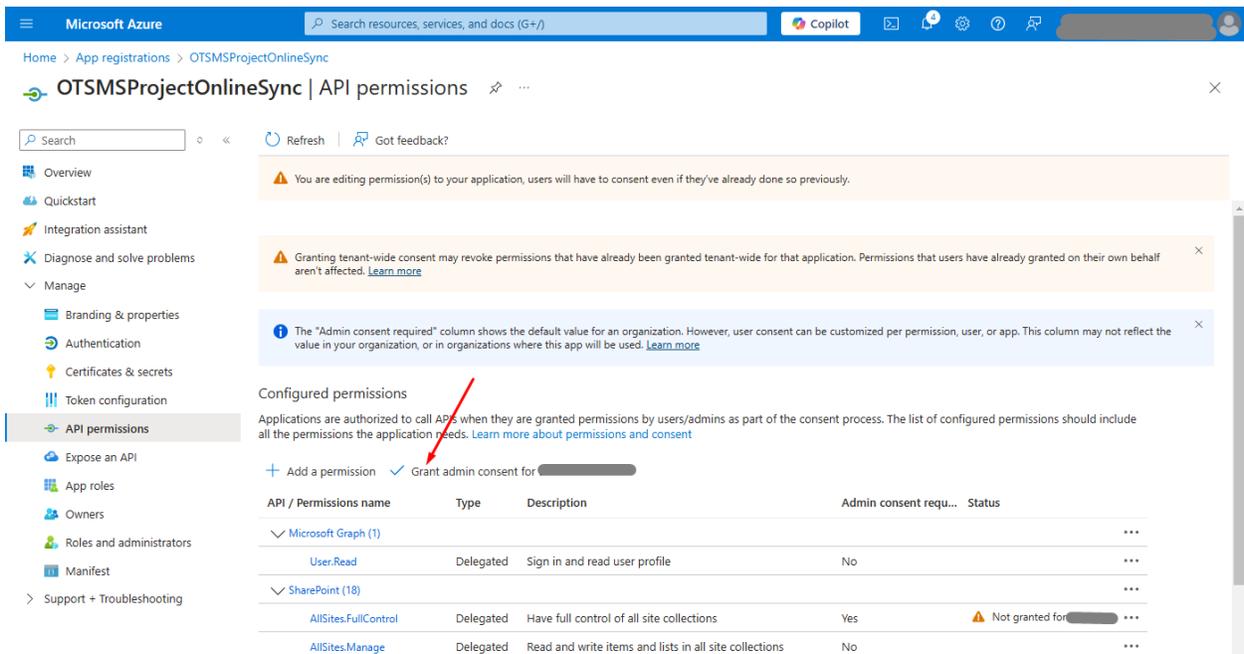
Microsoft Graph
Take advantage of the tremendous amount of data in Office 365, Enterprise Mobility + Security, and Windows 10. Access Microsoft Entra ID, Excel, Intune, Outlook/Exchange, OneDrive, OneNote, SharePoint, Planner, and more through a single endpoint.

- Azure Communication Services**
Rich communication experiences with the same secure CPaaS platform used by Microsoft Teams
- Azure DevOps**
Integrate with Azure DevOps and Azure DevOps server
- Azure Rights Management Services**
Allow validated users to read and write protected content
- Azure Service Management**
Programmatic access to much of the functionality available through the Azure portal
- Dynamics 365 Business Central**
Programmatic access to data and functionality in Dynamics 365 Business Central
- Dynamics CRM**
Access the capabilities of CRM business software and ERP systems
- Intune**
Programmatic access to Intune data
- Office 365 Management APIs**
Retrieve information about user, admin, system, and policy actions and events from Office 365 and Microsoft Entra ID activity logs
- OneNote**
Create and manage notes, lists, pictures, files, and more in OneNote notebooks
- Power Automate**
Embed flow templates and manage
- Power BI Service**
Programmatic access
- SharePoint**
Interact remotely with SharePoint data

Select **"Delegated permissions"** and select all possible permissions...



Next, **“Grant”** the permissions...



As a result, it should appear like highlighted example below:

Microsoft Azure | Search resources, services, and docs (G+)

OTSMSPROjectOnlineSync | API permissions

Search | Refresh | Got feedback?

Overview

Quickstart

Integration assistant

Diagnose and solve problems

Manage

Branding & properties

Authentication

Certificates & secrets

Token configuration

API permissions

Expose an API

App roles

Owners

Roles and administrators

Manifest

Support + Troubleshooting

Successfully granted admin consent for the requested permissions.

Granting tenant-wide consent may revoke permissions that have already been granted tenant-wide for that application. Permissions that users have already granted on their own behalf aren't affected. [Learn more](#)

The "Admin consent required" column shows the default value for an organization. However, user consent can be customized per permission, user, or app. This column may not reflect the value in your organization, or in organizations where this app will be used. [Learn more](#)

Configured permissions

Applications are authorized to call APIs when they are granted permissions by users/admins as part of the consent process. The list of configured permissions should include all the permissions the application needs. [Learn more about permissions and consent](#)

+ Add a permission Grant admin consent for Lookout Software

API / Permissions name	Type	Description	Admin consent requ...	Status
Microsoft Graph (1)				
User.Read	Delegated	Sign in and read user profile	No	Granted for [redacted]
SharePoint (18)				
AllSites.FullControl	Delegated	Have full control of all site collections	Yes	Granted for [redacted]
AllSites.Manage	Delegated	Read and write items and lists in all site collections	No	Granted for [redacted]
AllSites.Read	Delegated	Read items in all site collections	No	Granted for [redacted]

7. Create “Client Secret” and save the secret key to OTS.

Microsoft Azure | Search resources, services, and docs (G+)

Home > App registrations > OTSMSProjectOnlineSync

OTSMSProjectOnlineSync | Certificates & secrets

Overview
Quickstart
Integration assistant
Diagnose and solve problems
Manage
Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Owners
Roles and administrators
Manifest
Support + Troubleshooting

OTSMSProjectOnlineSync | Certificates & secrets

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (0)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value
No client secrets have been created for this application.		

OTSMS_APPClient
730 days (24 months)

Add Cancel

Copy Secret Key Value

Microsoft Azure | Search resources, services, and docs (G+)

Home > App registrations > OTSMSProjectOnlineSync

OTSMSProjectOnlineSync | Certificates & secrets

Overview
Quickstart
Integration assistant
Diagnose and solve problems
Manage
Branding & properties
Authentication
Certificates & secrets
Token configuration
API permissions
Expose an API
App roles
Owners
Roles and administrators
Manifest
Support + Troubleshooting

OTSMSProjectOnlineSync | Certificates & secrets

Application registration certificates, secrets and federated credentials can be found in the tabs below.

Certificates (0) **Client secrets (1)** Federated credentials (0)

A secret string that the application uses to prove its identity when requesting a token. Also can be referred to as application password.

+ New client secret

Description	Expires	Value	Secret ID
OTSMS_APPClient	11/2/2026	[Redacted]	2ed1352c-c57b-4888-95e9-99ca26ce703e

To store the secret key in OTS...

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

Options v User Accounts Change Password **Accounts/Policies v** Welcome Email Activate About/Updates

Options User Management System Gene

Password Options

Use for usernames and passwords

Office Timesheets v
Windows domain name
*Note: You should configure IIS manually if you want Windows Authentication to work properly.
*Note: Your current name - admin

If using Office Timesheets for Accounts and Passwords

Require combination of numbers and characters:
Minimum character length of passwords: 0 v
Maximum length of passwords: 14 v
Create random password for User Accounts

Authentication Settings via Azure Active Directory

Enable Azure AD
Use User Principal Name as Azure ID
Tenant ID
Application (client) ID
Client secret
Domain Global v
Redirect URI http://localhost/OTS_80017/Pages/3PAAuth/AzureAuth.aspx
Redirect URI (Access Token) http://localhost/OTS_80017/Pages/3PAAuth/AzureAccessTokenAuth.aspx
Redirect URI OTS Mobile http://localhost/OTSMobile_80017/Login

8. Copy "Application ID" and "Tetant ID" and paste into the corresponding fields in OTS...

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

Options v User Accounts Change Password **Accounts/Policies v** Welcome Email Activate About/Updates

Options User Management System Gene

Password Options

Use for usernames and passwords

Office Timesheets v
Windows domain name
*Note: You should configure IIS manually if you want Windows Authentication to work properly.
*Note: Your current name - admin

If using Office Timesheets for Accounts and Passwords

Require combination of numbers and characters:
Minimum character length of passwords: 0 v
Maximum length of passwords: 14 v
Create random password for User Accounts

Authentication Settings via Azure Active Directory

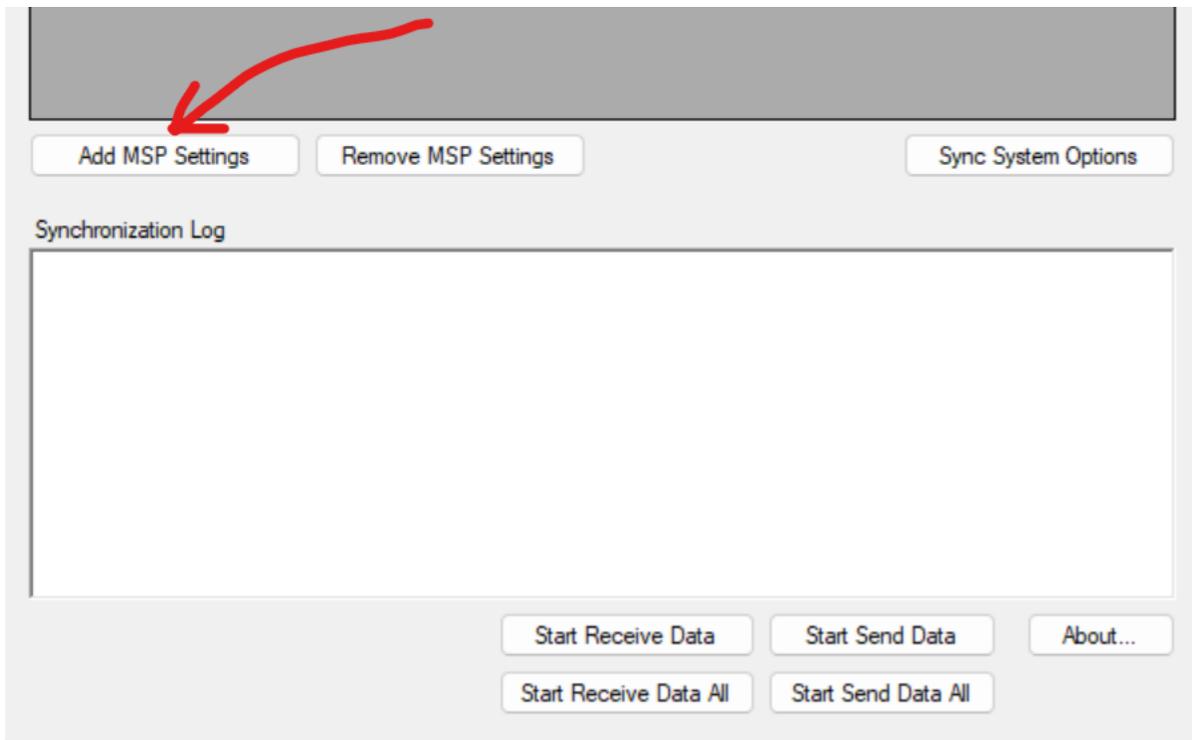
Enable Azure AD
Use User Principal Name as Azure ID
Tenant ID e49bc376-
Application (client) ID eff25baa-
Client secret
Domain Global v
Redirect URI http://localhost/OTS_80017/Pages/3PAuth/AzureAuth.aspx
Redirect URI (Access Token) http://localhost/OTS_80017/Pages/3PAuth/AzureAccessTokenAuth.aspx
Redirect URI OTS Mobile http://localhost/OTSMobile_80017/Login

9. Check the “Enable Azure AD” checkbox
10. Check “Use User Principal Name as Azure ID” if you desire use to “User Principal Name” for mapping to OTS users (**highly recommended**), otherwise keep it unchecked if you desire use “Object ID”.
11. Click **Save** to save your settings.

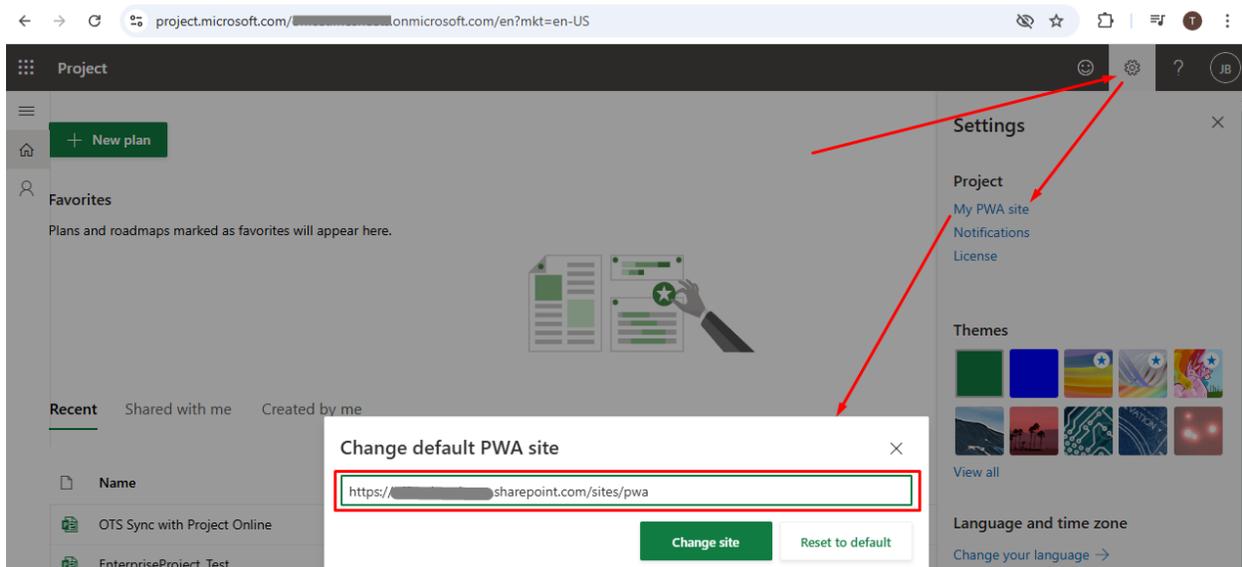
Adding Sync Settings for Each Online Project Plan

Sync Connection Settings

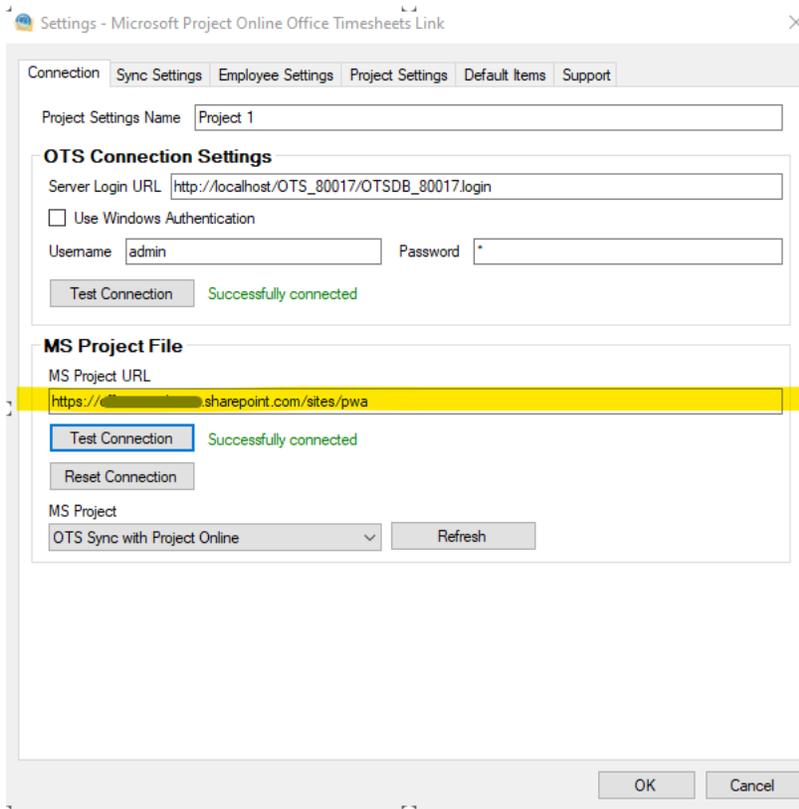
1. Open the **OTSMSPProjectOnlineSync** App and click on the **Add MSP Settings** button...



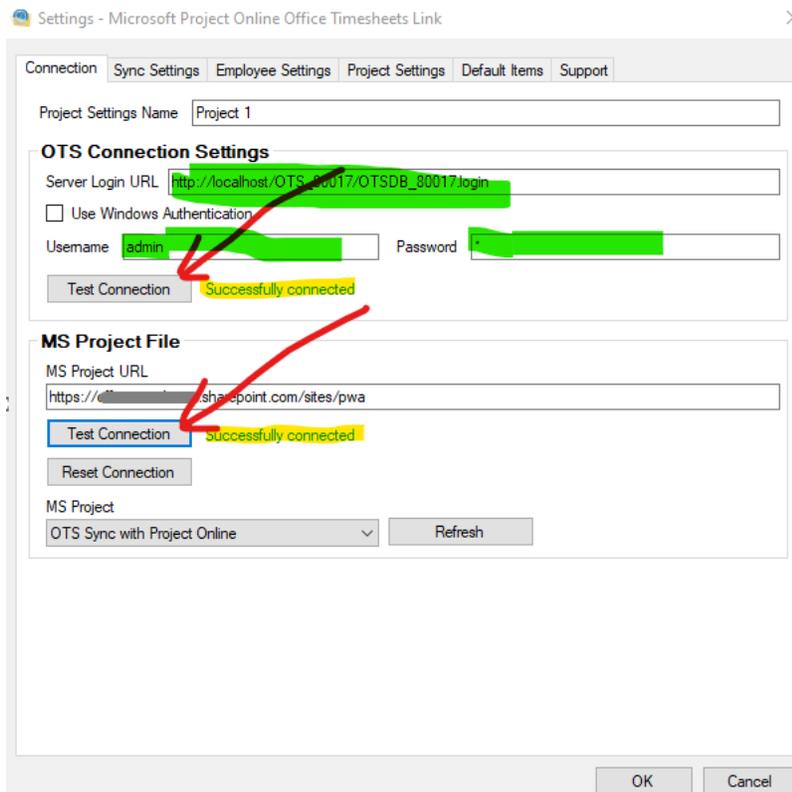
2. To configure the **OTSMSPProjectOnlineSync** for connecting to **Microsoft Project Online (PWA)** you'll copy the URL for your Project Online account. To obtain the proper MS Project URL you to log into your Project Online account; and go to **Project -> Settings -> My PWA Site...**



Copy and paste this URL into the “MS Project URL” field in the **OTSMSPProjectOnlineSync** app...



3. Fill in your Office Timesheets Url, Username and Password and test both connections....

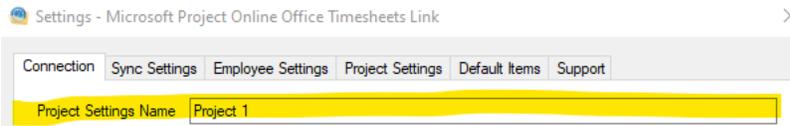


Note: The **OTSMSPROjectOnlineSync app** connects to Office Timesheets, and connects to the Azure App to retrieve an Access Token; and then the **OTSMSPROjectOnlineSync App** uses the access token to connection to PWA site. During test connection cycle the user may be prompted to authenticate with Microsoft.

4. Next, press the **Refresh** button next the **MS Project** field dropdown list; and choose the corresponding project.



5. Enter the corresponding project name into the **Project Settings Name** field.



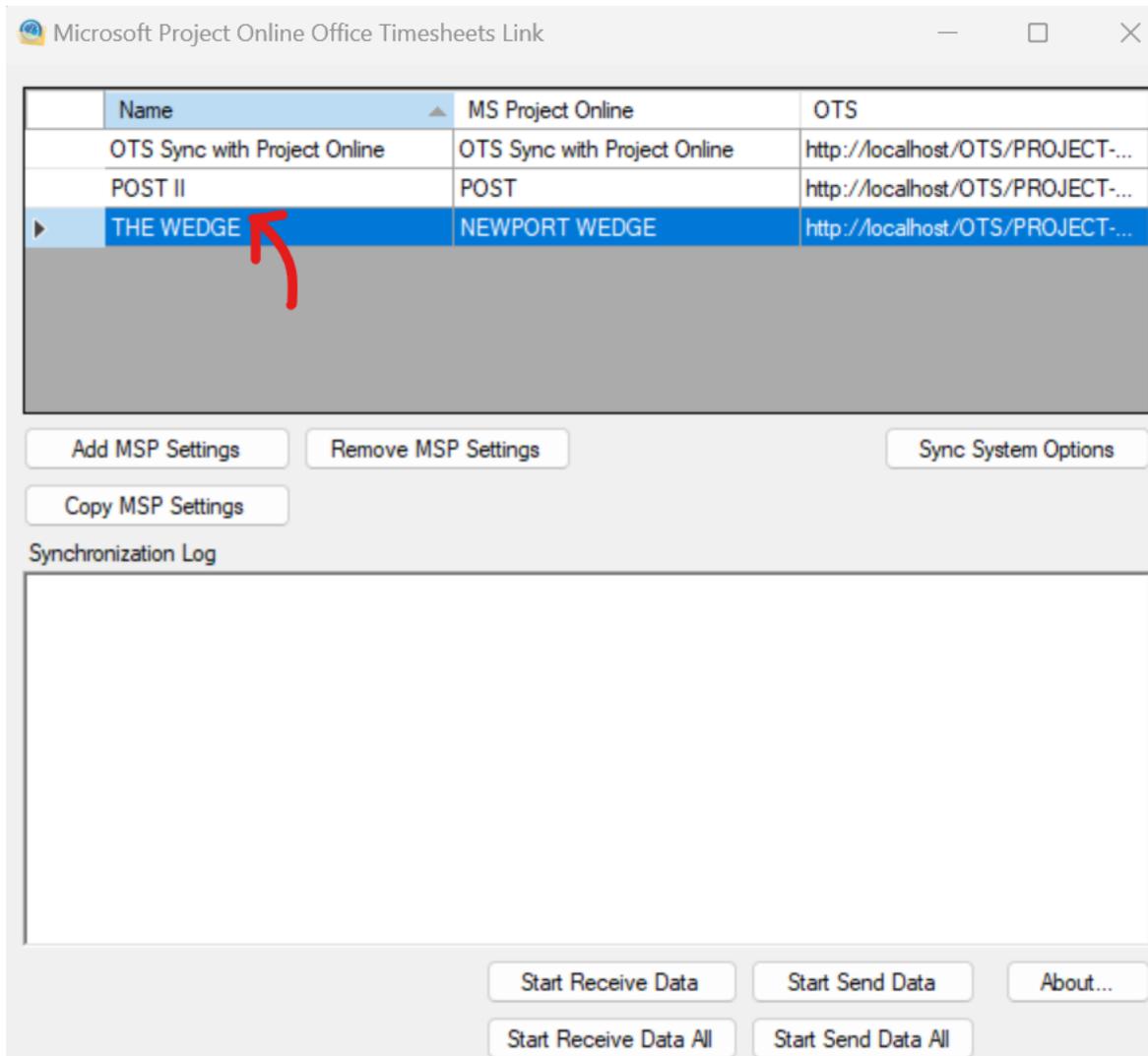
6. Click **OK** to Save your settings.



General “Sync Settings”

Each project plan you sync with Office Timesheets has its’ own general sync settings.

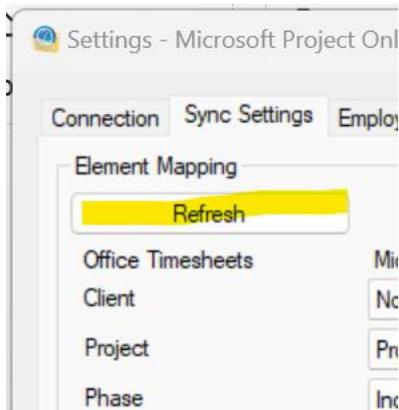
1. To configure project’s sync settings, open the **OTSMSPROjectOnlineSync** App and double-click on the **Name** of the project you wish to configure...



2. With the *Setting* dialog open; click on the **Sync Settings** tab...
3. Configure the *Element Mapping*, *Task Status Mapping*, *Rate Mapping* and *Send Data Events Mapping* (all described below); and click **OK** save your settings.

Element Mapping

The **Element Mapping** section of the *Sync Settings* tab allows you to map the structure of your Microsoft Project plan to the Element Level Structure of your Office Timesheets database. Each time you wish add/modify Element Mapping you'll need to first press the **Refresh** button in order to the load the latest Element Level Definitions from Office Timesheets...



There three (3) options you can choose in the Microsoft Project column:

- **Project** – when choosing this option, the name of the project is mapped to the selected Office Timesheets Element Level. This should be mapped to Element Level in Office Timesheets that correspond to your project and/or job level.
- **Indent Levels (1-9)** – if your project plan contains consistent indentation, where specified indent levels represent a corresponding Element Tracking level in Office Timesheets, then you can map those indent levels to their corresponding Element Level in Office Timesheets. For example, if the first indent level in your project plan’s task hierarchy represents Phases for your project, then you would map the “Indent 1” to the “Phase” Element Level in Office Timesheets.
- **Assignment** – regardless of the indent level in Microsoft Project, any task that contain work that is assigned to a Resource is considered an “Assignment”. Those the lowest indent level of any task that contains work that is assigned to a resource will appear in the Office Timesheets Element Level in which you map to an “Assignment”. Typically, the “Assignment” option is mapped to “Activity” or “Deliverable” Element Tracking level in Office Timesheets.
- **No Mapping** – “No Mapping” is the option you should choose for each Office Timesheet Element Level that doesn’t correspond with the project’s name, an indent level and/or assignment. When the “No Mapping” option is selected, you can also select an existing item stored at the element level in your Office Timesheets’ database. Thus, when each task that is created in Office Timesheets from your project plan will contain the selected item at the corresponding Element Level in Office Timesheets. In the example below, we selected the “No Mapping” option for the Customer Element Level, and have linked it to a specified client name.

Settings - Microsoft Project Online Office Timesheets Link

Connection Sync Settings Employee Settings Project Settings Default Items Support

Element Mapping

Refresh

Office Timesheets	Microsoft Project	Set Element Item for Non-Mapped Levels?	
Client	No Mapping	<input checked="" type="checkbox"/>	NEWPORT
Project	Project	<input type="checkbox"/>	No Selected
Phase	Indent 1	<input type="checkbox"/>	No Selected
Activity	Assignment	<input type="checkbox"/>	No Selected
Level5	No Mapping	<input type="checkbox"/>	No Selected
Level6	No Mapping	<input type="checkbox"/>	No Selected
Level7	No Mapping	<input type="checkbox"/>	No Selected
Level8	No Mapping	<input type="checkbox"/>	No Selected
Level9	No Mapping	<input type="checkbox"/>	No Selected
Level10	No Mapping	<input type="checkbox"/>	No Selected

Task Status Mapping

Office Timesheets Complete Microsoft Project Complete Refresh

Rate Mapping

Send MSP Standart Rate to Office Timesheets employee rate:

Standard rate: Pay rates Refresh

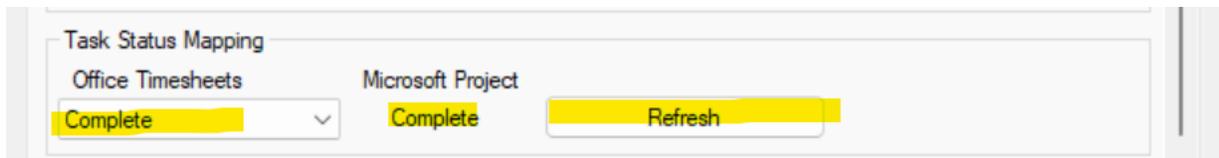
Send Data Events

Make data available for sending when the following approval process step is applied

OK Cancel

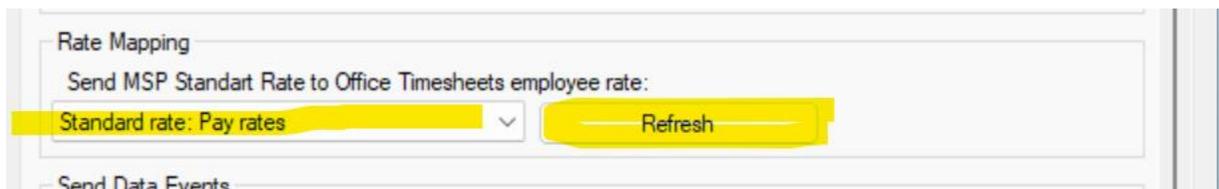
Task Status Mapping

The Task Status Mapping option allows you to update a specified Office Timesheets tasks status when the task in Microsoft Project has become 100% complete by the resource. Subsequently, if a user updates the task in Office Timesheets with this status, then the task will get updated to 100% complete on the next sync with the project plan.



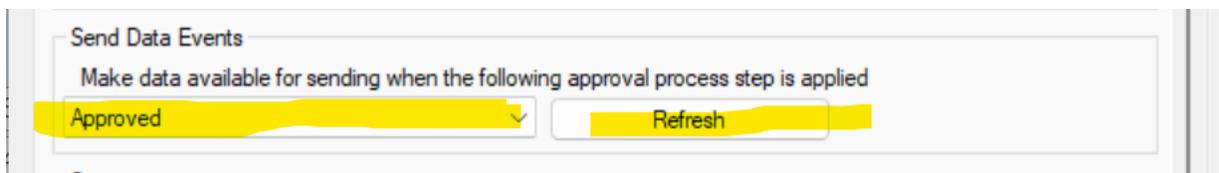
Rate Mapping

Allows you to map a resources rate in Microsoft Project to a specified Employee's Rate tab.



Send Data Events

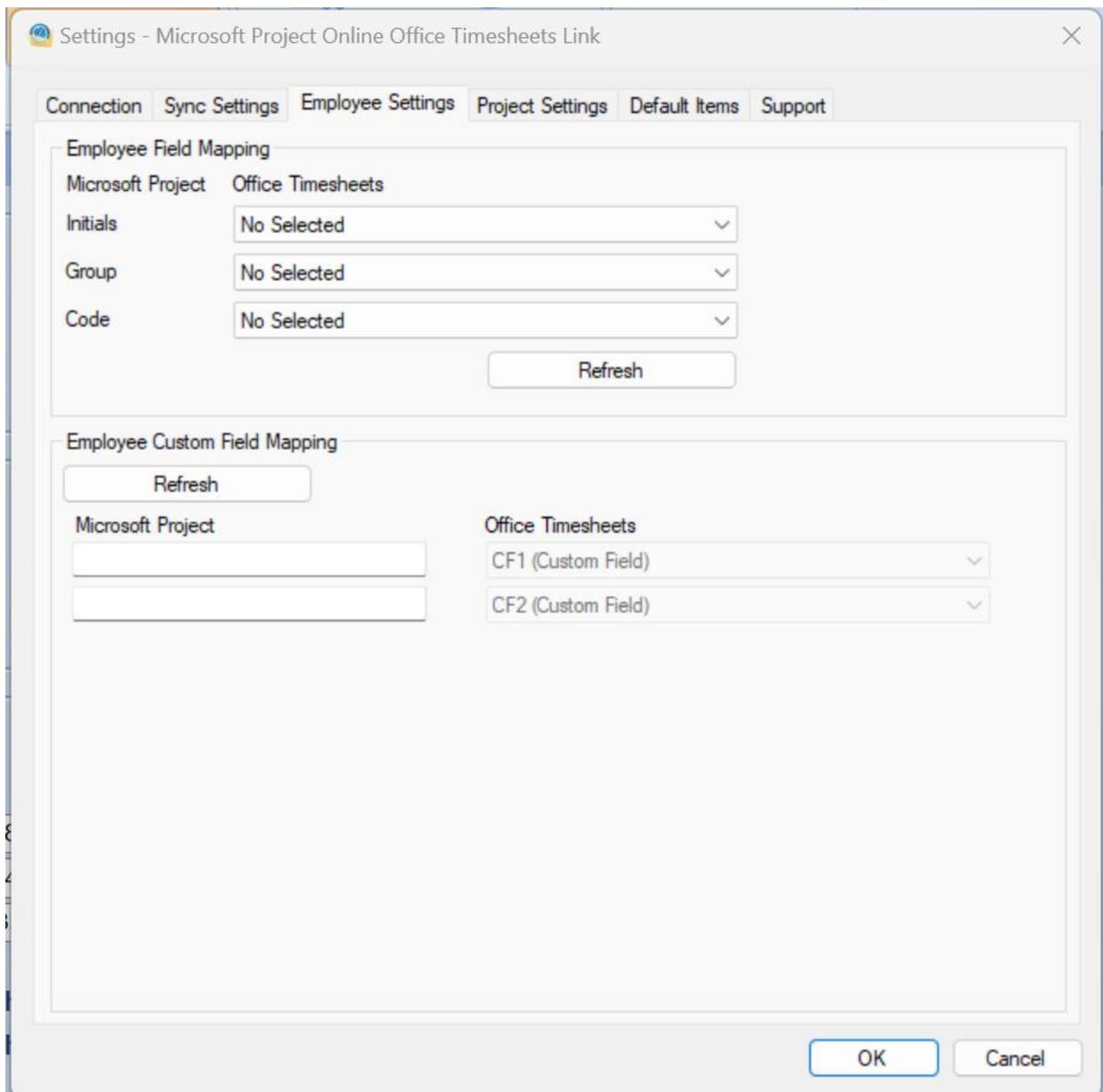
The Send Data Events option allows the limit the sync of time entry to only those that meet a specified approval process.



Employee Settings

Each project plan you sync with Office Timesheets has its' own Employee sync settings.

1. To configure your project's Employee Settings, open the **OTSMSPProjectOnlineSync** App and double-click on the **Name** of the project you wish to configure; and then click on the **Employee Settings** tab...
 2. Select the Employee Field and Employee Custom Field Mapping per your preferences.
 3. Click **OK** to save your settings.
- **Employee Field Mapping** – allows you to map Microsoft Project Employee Initials, Group and Code fields to Office Timesheets' Employee Custom fields and/or Employee Custom Terms fields.
 - **Employee Custom Field Mapping** – allows you to map Microsoft Project Custom Employee fields to Office Timesheets' Employee Custom fields and/or Employee Custom Terms fields.



Project Settings

Each project plan you sync with Office Timesheets has its' own **Project** sync settings.

1. To configure your project's Project sync settings, open the **OTSMSProjectOnlineSync** App and double-click on the **Name** of the project you wish to configure; and then click on the **Project Settings** tab...

2. Select the **Project Settings** per your preferences.
 3. Click **OK** to save your settings.
- **Create employee in Office Timesheets for Microsoft Project Manager** – if the project contains a project manager, and the project manager does not already exist as an employee in Office Timesheets, activating this setting will then add the project manager as an employee in Office Timesheets.
 - **Default Project Group** – will place the specified project into the selected group.
 - **Project Custom Field Mapping** – allows you to map Microsoft Project custom fields to the Office Timesheets' project element level custom fields.

Settings - Microsoft Project Online Office Timesheets Link

Connection Sync Settings Employee Settings **Project Settings** Default Items Support

Create employee in Office Timesheets for Microsoft Project Manager

Default Project Group

BLZ PORTFOLIO Refresh

Project Custom Field Mapping

Refresh

Microsoft Project Office Timesheets

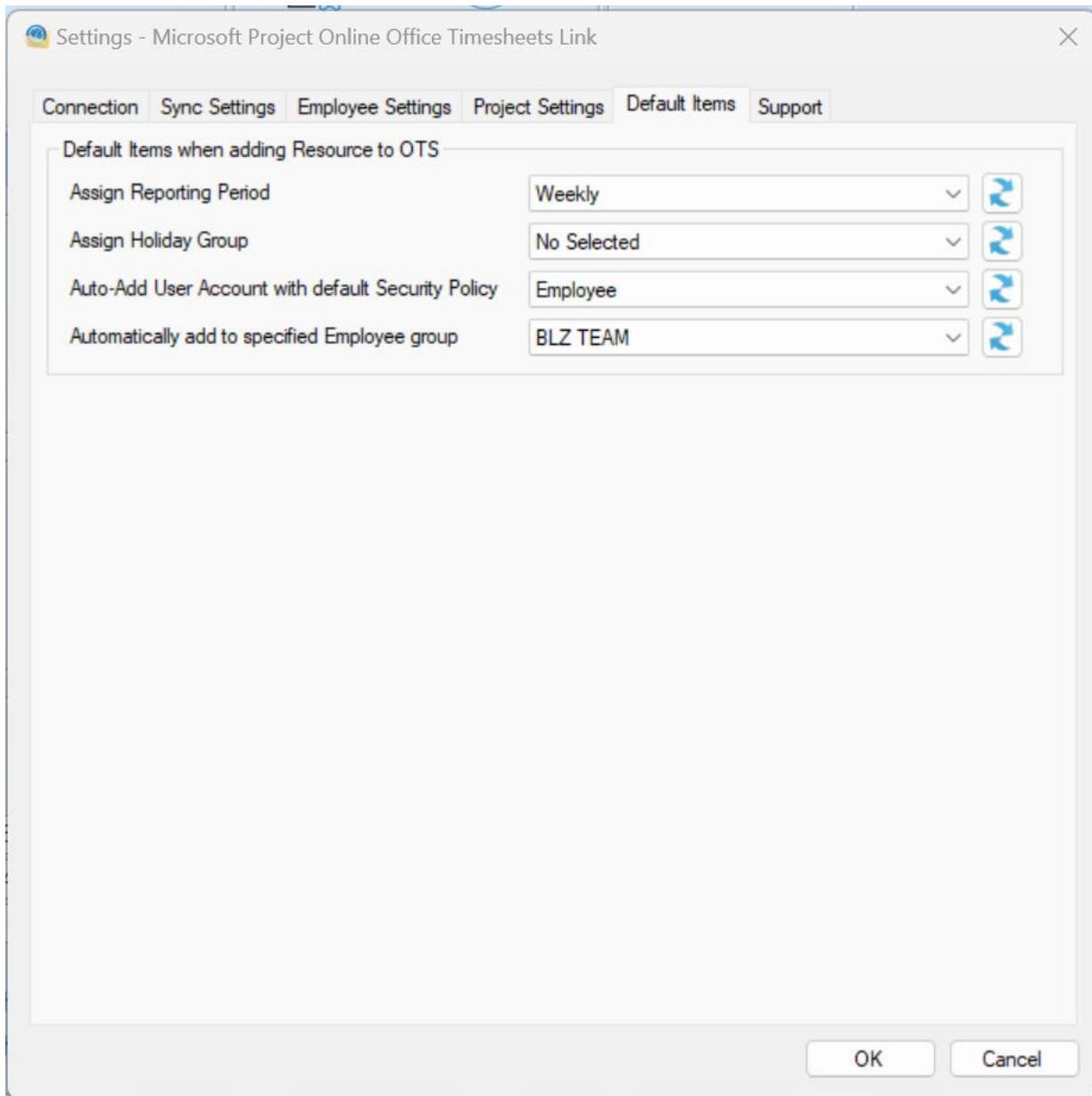
PROJ CUST 1 (Custom Field)

OK Cancel

Default Items

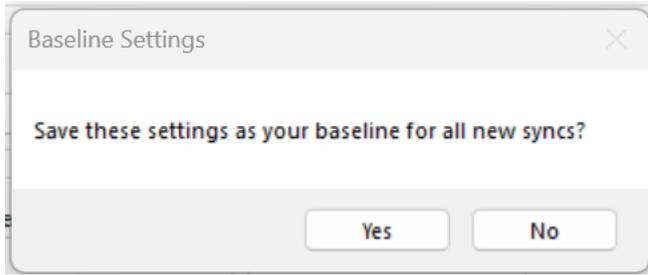
Each project plan you sync with Office Timesheets has its' own **Default Items** sync settings.

1. To configure your project's **Default Items** sync settings, open the **OTSMSProjectOnlineSync** App and double-click on the **Default Items** of the project you wish to configure; and then click on the **Default Items** tab...
 2. Select the **Default Items** per your preferences.
 3. Click **OK** to save your settings.
-
- Assign Reporting Period – with each new employee/resource added to Office Timesheets, the sync will assign the specified Reporting Period.
 - Assign Holiday Group – with each new employee/resource added to Office Timesheets, the sync will assign the specified Holiday Group.
 - Auto-Add user account with default Security Policy – with each new employee/resource added to Office Timesheets, the sync will assign the specified Security Policy.
 - Automatically add to specified Employee group – with each new employee/resource added to Office Timesheets, the sync will assign the employee to the specified Employee Group.



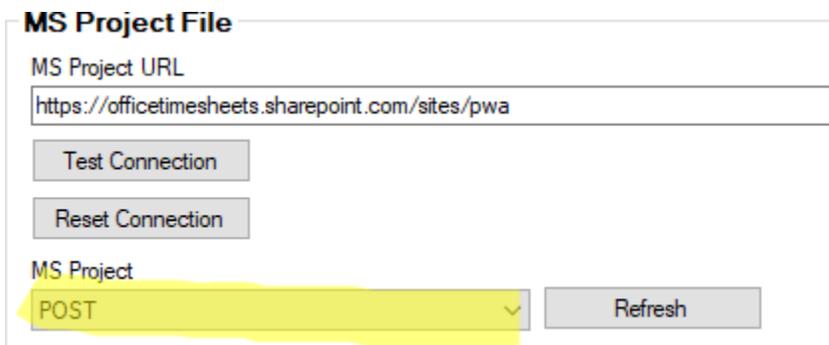
Saving Baseline Sync Settings

Each time you modify and save a project's sync settings in the Microsoft Project Online Link app for Office Timesheets you'll be prompted with the following dialog:

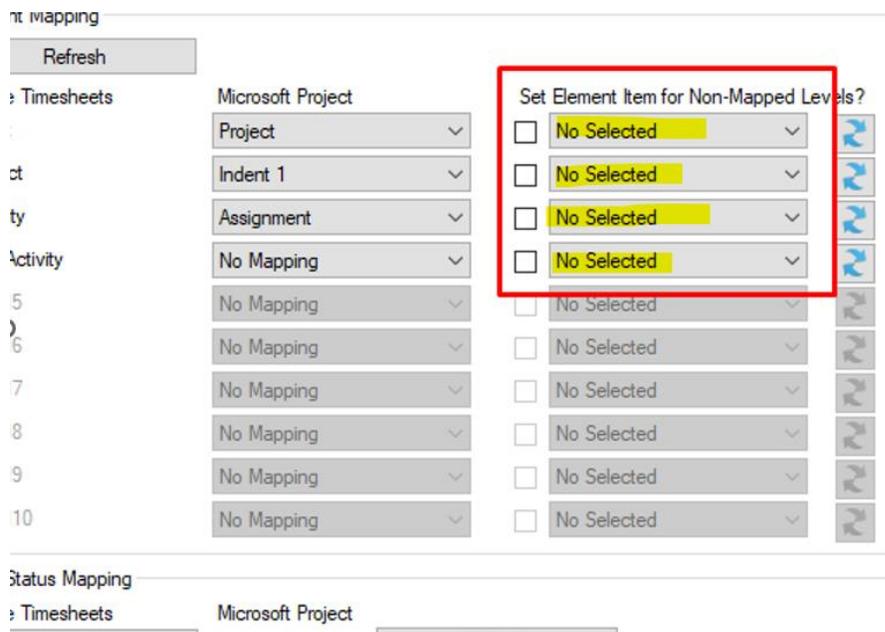


If you choose “**Yes**” then all the settings from this project’s sync will be saved and automatically applied with each new project sync you created, with the exception of “MS Project” name selection in *Connection* tab (see screenshot with highlight below); and any name “Element Item Name Selections for Non-Mapped Levels” you’ve chosen in the *Sync Settings* tab (see screenshot with highlight below).

MS Project name selection...



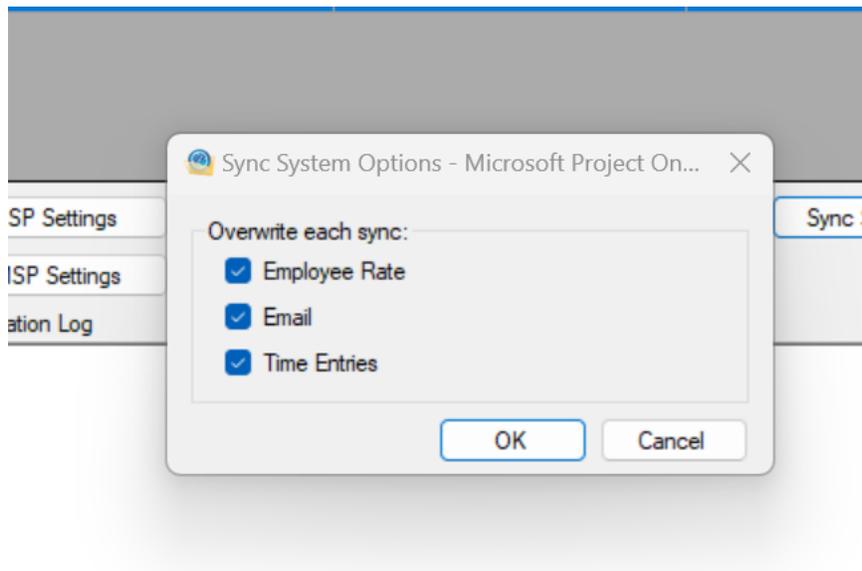
Element Item Name Selections for Non-Mapped Levels...



Sync System Options

Office Timesheets can update Employee Rates, Employee Email address and/or Employee Time Entries with each sync if these corresponding items are checked in the **Sync System Options**. To open the Sync System Options:

1. Open the **OTSMSProjectOnlineSync** App and click on the **Sync System Options** button.
2. Check/Uncheck Employee Rate, Email and Time Entry options; and click **OK**.



Receiving Data from Microsoft Project Online

Once all the configuration options for a specified project have been configured, highlight the project name in the project list, and click on the **Start Receive Data...**



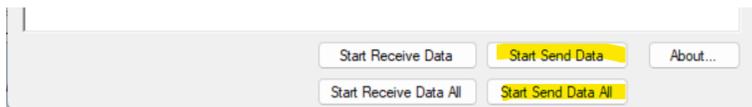
As Office Timesheet receives resource/employee data and the resource's/employee's task assignments, a real-time log will appear in the Synchronization Log window to show progress of the synchronization. You can receive data from each defined project as often as you like.

NOTE: If you have more than one project file defined in the sync app, you can click on the **Start Receive Data All** button to sync the data from all your defined projects with a single click.

Sending Time Data (Actual Hours) from Office Timesheets to Microsoft Project Online

After receiving task assignments from a specified project and employees have entered time on the project's tasks assignments in Office Timesheets, those entries can be sent back to the project plan as Actual Work.

To send entries back to a Microsoft Project Online project plan, highlight the selected project and then click on the **Start Send Data** button.



As Office Timesheet sends hours (Actual Work) entries to specified plans in Microsoft Project Online, a real-time log will appear in the Synchronization Log window to show progress of the synchronization. You can send data from each defined project as often as you like.

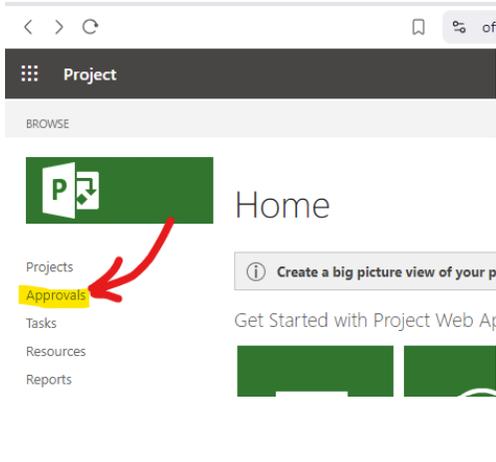
NOTE: If you have more than one project file defined in the sync app, you can click on the **Start Send Data All** button to sync the data from all your defined projects with a single click.

Approving Entries and Checking In Status Updates

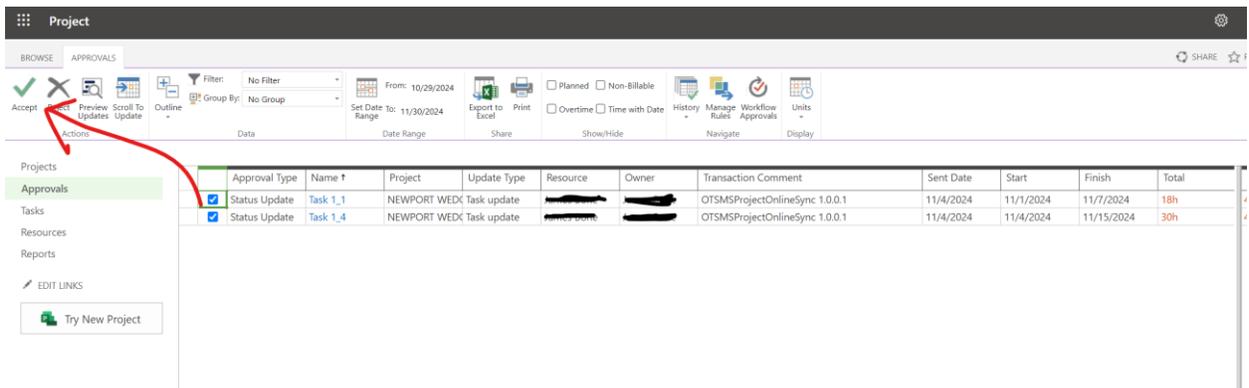
Several quick actions must be taken before project plans are updated within Microsoft Project Online after Office Timesheets sends entries. Those steps are described below:

Step One: Approve the Entries

When entries are sent to Microsoft Project to update actual work, they must first be reviewed and approved. To review and approve these entries, log into Project Online; and click on **Approvals...**



Review the entries in the Approvals area; check the entries you wish to approve; and click on the **Accept** icon...



Enter comments in the *Confirm Approval* dialog; and click **OK**.

The screenshot displays the Microsoft Project Online interface. The top navigation bar includes 'Project' and 'APPROVALS'. Below this is a ribbon with various action buttons like 'Accept', 'Reject', 'Preview Updates', 'Scroll To Update', 'Outline', 'Filter', 'Group By', 'Set Date Range', 'Export to Excel', 'Print', 'Planned', 'Non-Billable', 'Overtime', 'Time with Date', 'History', 'Manage Rules', 'Workflow Approvals', and 'Units'. A table of approval records is visible, with two rows selected. A 'Confirm Approval' dialog box is overlaid on the table, containing a text area with the following text: 'Synced from Office Timesheets. Reviewed and approved. 11/04/2024'. The dialog box has 'OK' and 'Cancel' buttons at the bottom right.

Approval Type	Name ↑	Project	Update Type	Resource	Owner	Transaction Comment	Sen
<input checked="" type="checkbox"/>	Status Update	Task 1_1	NEWPORT WEDC	Task update	[REDACTED]	OTSMSPROJECTONLINESYNC 1.0.0.1	11/4
<input checked="" type="checkbox"/>	Status Update	Task 1_4	NEWPORT WEDC	Task update	[REDACTED]	OTSMSPROJECTONLINESYNC 1.0.0.1	11/4

Step 2: Check in Project status updates...

Once you've approved time entries sent from Office Timesheets to Project Online, you'll need to check in the changes so they are visible to everyone with access to the project. To check in the approved time entries navigate to the specified schedule; and click on the **check in** link the notifications area at the top of the screen...

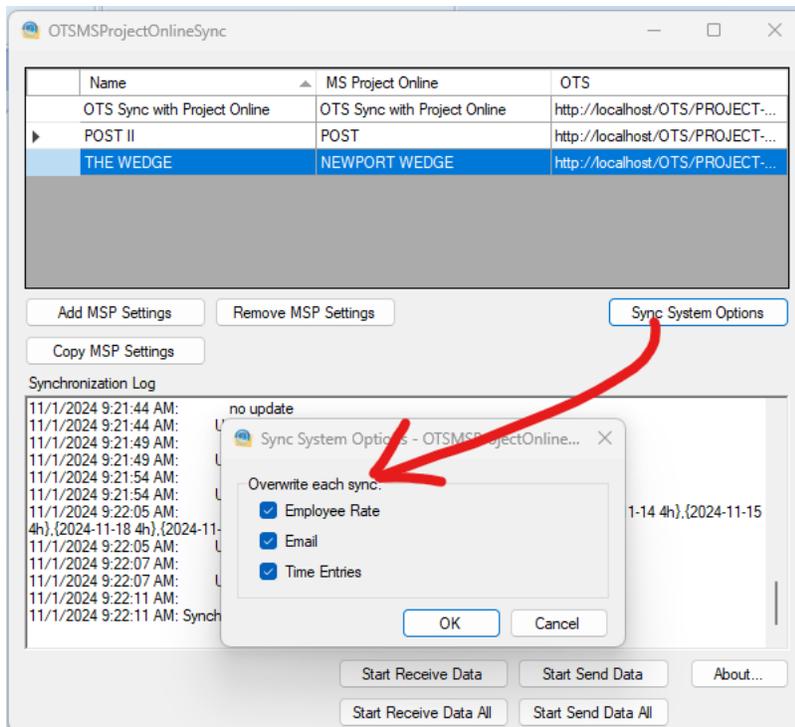
The screenshot shows the Microsoft Project software interface. At the top, there is a ribbon with tabs for BROWSE, PROJECT, PAGE, TASK, and OPTIONS. Below the ribbon are various toolbars including Clipboard, Project, Editing, Tasks, and Data. A yellow warning banner is visible, stating: "We're waiting to apply 2 project status updates. To avoid potential conflicts, check in the project before you continue editing." Below this, it says: "Status: Checked-out to you since 11/1/2024 10:46 AM Last Modified: 11/4/2024 4:56 PM Version: Draft". A red arrow points to the word "check" in the warning message. Below the warning is a calendar view for November 2024, with a "Today" marker on November 4th. Below the calendar is a task list table.

ID	Mode	Task Name	Work	Baseline Work	Work Variance	Actual Work	Remaining Wor	% Work Compli	Start
0		NEWPORT WEDGE	1,128h		1,128h	116h	1,012h	10%	10/30/24
1		Phase 1	712h		712h	60h	652h	8%	10/30/24
2		Task 1_1	40h		40h	0h	40h	0%	10/30/24
3		Task 1_2	336h		336h	0h	336h	0%	10/30/24
4		Task 1_3	96h		96h	0h	96h	0%	11/1/2024
5		Task 1_4	240h		240h	60h	180h	25%	11/4/2024
6		Phase 2	88h		88h	0h	88h	0%	11/11/2024
7		Task 2_1	40h		40h	0h	40h	0%	11/11/2024

TIME ENTRY UPDATE OPTIONS

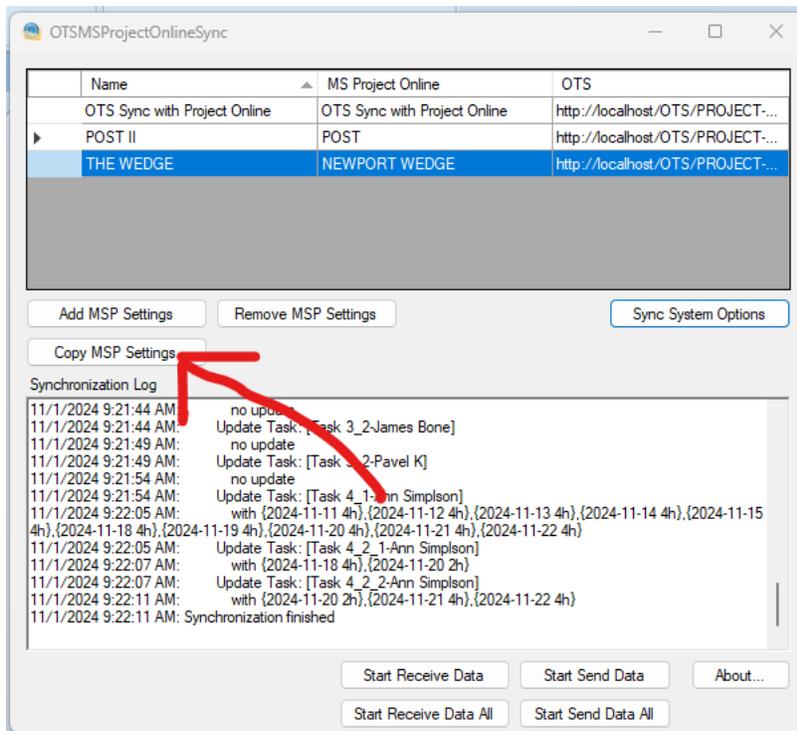
Currently, there are three system-wide sync options that let you determine if certain data elements are written only once; or if they are overwritten with each sync. Below is a description of each of those data elements:

- **Employee Rate** – when checked, each sync will overwrite the employee’s mapped rate in Office Timesheets. Office Timesheets does not send rate data to Microsoft Project. If this setting is unchecked, and an employee’s rate is modified in Office Timesheets, this modified rate will remain in Office Timesheets, and will no longer be modified by the Microsoft Project Online Sync.
- **Email** - when this option is checked, each sync will overwrite the employee’s email address in Office Timesheets. Office Timesheets does not update the email address when syncing back to Project Online. If this setting is unchecked, and an employee’s email address is modified in Office Timesheets, the modified email address will remain in Office Timesheets, and will no longer be modified by the Microsoft Project Online Sync.
- **Time Entries** – when this option is checked Office Timesheets, each sync will overwrite all time entries with the current entries in Office Timesheets.



COPYING SETTINGS FROM OTHER SYNCs

Because each project defined in the Project Online Sync for Office Timesheets app can contain its' own unique sync settings, the sync app gives you the ability copy all the settings from already defined project sync to a new project sync. To copy settings from project's sync to a new project's sync simply highlight project row you wish to copy; and the click on the **Copy MSP Settings** button...



Special Notes Regarding Converting Manually Scheduled Tasks to Auto Scheduled

When the “Convert Manually Scheduled Tasks to Auto Scheduled” setting is checked and the selected project is in **Edit Mode** in Project online, and was not checked in, the sync tool can't do check out the project's data. If this is case, you'll the following message when using the Microsoft Project Online Sync App for Office Timesheets:

Microsoft Project Online Office Timesheets Link

Name	MS Project Online	OTS
POST	POST	http://localhost/OTSAP/OTSDB...
▶ Project 1	OTS Sync with Project Online	http://localhost/OTS_80017

Synchronization Log

```

11/6/2024 5:52:29 PM: [T2-Pavel K]
11/6/2024 5:52:29 PM: [T3-Pavel K]
11/6/2024 5:52:29 PM: [T5-Employee 1]
11/6/2024 5:52:30 PM: [T6-James Bone]
11/6/2024 5:52:30 PM: [T7-James Bone]
11/6/2024 5:52:30 PM: Receive entry data from OTS by batches for 7 task(s)
11/6/2024 5:52:30 PM:   Receiving entry data for 7 task(s)
11/6/2024 5:52:30 PM:   Received entry data for 7 task(s)
11/6/2024 5:52:30 PM: Receiving entry Data from OTS by batch finished
11/6/2024 5:52:30 PM: Update 7 tasks and their entries in the MS Project Online started.
11/6/2024 5:52:35 PM: Update Tasks to Auto Scheduled has failed. Try to Close the project in Project Online and
Check In, then retry sending data.
11/6/2024 5:52:35 PM: Error appeared during update entries in MS Project Online. See error log for more info.

```

To get access to **Draft** tasks you'll first need to "Close" the project...

Close the project.
You will have the option to check the project in if it is currently checked out to you.

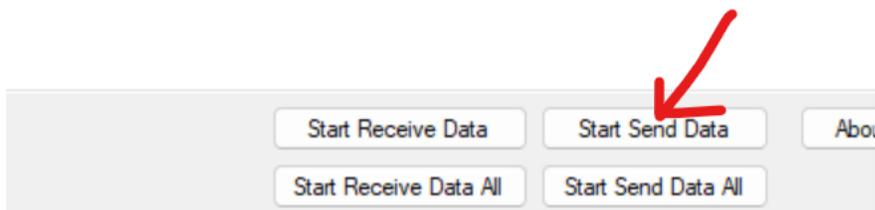
ID ↑	Mode	Task Name	Work	Baseline Work	Work Variance	Actual Work	Remaining Wor	% Work Compl	ST
0		OTs Sync with Project	216h	80h	136h	72h	144h	33%	10
1		T1_1	80h	80h	0h	0h	80h	0%	10
2		T2	16h	0h	16h	0h	16h	0%	10
3		T1	32h	0h	32h	32h	0h	100%	10
4		T2	32h	0h	32h	32h	0h	100%	10
5		T3	32h	0h	32h	32h	0h	100%	10
6		T4	0h	0h	0h	0h	0h	0%	10
7		T5	8h	0h	8h	0h	8h	0%	10
8		T6	40h	0h	40h	0h	40h	0%	10
9		T7	40h	0h	40h	40h	0h	100%	10

If you see this message, you'll need to **Close** and **Check-in** the project...

Close - OTS Sync with Project O...
Check in
Do you want to check your project in?
 Check it in Keep it checked out
OK Cancel

ID ↑	Mode	Task Name	Work	Baseline Work	Work Variance	A	Finish
0		OTs Sync with Project	216h	80h	136h	7	11/8/2024 5:00
1		T1_1	80h	80h	0h	0	10/18/2024 5:00
2		T2	16h	0h	16h	0	10/22/2024 5:00
3		T1	32h	0h	32h	3	10/18/2024 5:0
4		T2	32h	0h	32h	3	10/16/2024 5:0
5		T3	32h	0h	32h	3	10/16/2024 5:00
6		T4	0h	0h	0h	0	10/14/2024 5:00
7		T5	8h	0h	8h	0	10/15/2024 5:00
8		T6	40h	0h	40h	0h	10/29/2024 8:00
9		T7	40h	0h	40h	40h	10/29/2024 8:00

You'll then need to run the Start Data sync process again to complete the sync.



If a task in Project online is in **Manual** mode, then the task will be updated to **Auto scheduled**. You'll see this represented in the sync log as follows:

Microsoft Project Online Office Timesheets Link

Name	MS Project Online	OTS
POST	POST	http://localhost/OTSAP/OTSDB...
Project 1	OTS Sync with Project Online	http://localhost/OTS_80017

Add MSP Settings Remove MSP Settings Sync System Options

Copy MSP Settings

Synchronization Log

```
11/6/2024 5:53:50 PM: Received entry data for 7 task(s)
11/6/2024 5:53:50 PM: Receiving entry Data from OTS by batch finished
11/6/2024 5:53:50 PM: Update 7 tasks and their entries in the MS Project Online started.
11/6/2024 5:53:57 PM: Update Task Mode: [T7-James Bone] to "Auto Scheduled"
11/6/2024 5:54:00 PM: Update Task: [T1_1-Employee 1]
11/6/2024 5:54:02 PM: no update
11/6/2024 5:54:02 PM: Update Task: [T1_1-James Bone]
11/6/2024 5:54:04 PM: no update
11/6/2024 5:54:05 PM: Update Task: [T2-Pavel K]
11/6/2024 5:54:05 PM: no update
11/6/2024 5:54:05 PM: Update Task: [T3-Pavel K]
11/6/2024 5:54:06 PM: no update
11/6/2024 5:54:06 PM: Update Task: [T5-Employee 1]
11/6/2024 5:54:07 PM: no update
```

Start Receive Data Start Send Data About...

Start Receive Data All Start Send Data All

Also, one thing we have noticed, sometimes all buttons in Project Online will be inactive after the Sync app has updated specified tasks to Auto scheduled...

The screenshot shows the Project Online interface with the 'TASK' tab selected. The ribbon includes 'Clipboard', 'Project', 'Editing', and 'Tasks'. The 'Project' group contains 'Edit', 'Save', 'Close', and 'Publish' buttons, which are highlighted with a red box. The 'Editing' group includes 'Set Baseline', 'Manually Schedule', and 'Auto Schedule'. The 'Tasks' group includes 'Insert', 'Delete', 'Add to Timeline', and 'Add to Roadmap'. Below the ribbon, a status bar indicates 'Status: Checked-in Last Modified: 11/6/2024 6:30 PM Version: Published'. The main area shows a Gantt chart for 'OTs Sync with Project Online' with tasks T1 and T2. A table below the Gantt chart provides task details:

ID	Mode	Task Name	Work	Baseline Work	Work Variance
0		OTs Sync with Project Online	216h	80h	136h
1		T1_1	80h	80h	0h
2		T2	16h	0h	16h
3		T1	32h	0h	32h

In this case, you will need to **Check-in** the project here...

The screenshot shows the Project Online interface with the 'PROJECTS' tab selected. The ribbon includes 'Project', 'Navigate', 'Zoom', 'Data', 'Timeline', 'Share', and 'Project Type'. The 'Project' group contains 'New', 'Open', and 'Add SharePoint Sites'. The 'Navigate' group contains 'Build Team', 'Project Permissions', and 'Check in My Projects'. The 'Zoom' group contains 'Zoom In', 'Zoom Out', and 'Scroll to Project'. The 'Data' group contains 'Outline', 'Rollups', 'Filter', and 'Gantt Chart'. The 'Timeline' group contains 'Add Project', 'Add Tasks', and 'Export to Excel'. The 'Share' group contains 'Print', 'Export to Excel', and 'Print'. The 'Project Type' group contains 'Subprojects', 'Time with Date', and 'Change'. Below the ribbon, a status bar indicates 'Create a big picture view of your projects with Roadmap. Visit Project Home to get started on a new roadmap.' The main area shows a Gantt chart for 'NEWPORT WEDGE' with a progress bar at 7%. A table below the Gantt chart provides project details:

Project ID	Project Name
100002	EnterpriseProject_Test
100001	NEWPORT WEDGE
100000	OTs Sync with Project Online
100003	POST
200000	SharePointTaskList_Test

The 'NEWPORT WEDGE' project details are shown in a pop-up window. The 'Check in My Projects' button is highlighted with a red arrow. The 'Check in' button in the pop-up window is also highlighted with a red arrow.