



Projects Connector



4.5

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Projects Connector Overview

This guide documents the Projects Connector application.

OpenAir provides Projects Connector as a tool for exchanging project plan information between the Projects module and Microsoft Project. There are two key parts to setting up this relationship: the project plan and project tracking. Each is explained as follows.

- **Project plan** — concerns the overall structure and scope of the project, such as what tasks need to be accomplished by whom and when. It can be set up either in OpenAir or in Microsoft Project, and basic plan data can be exchanged between the two applications using Projects Connector. Ultimately, however, you must control or modify the project plan in either OpenAir or Microsoft Project, but not both. One or the other needs to be the "primary" since changing elements of the project plan in both applications can lead to irreconcilable discrepancies, and in some instances, duplicated transactional data.
- **Project tracking** — relies on user-input data, such as the hours each resource works on a task and assigned time associated with the project. Using these data, you can monitor the progress of the project, calculate what percentage of a task or phase is complete, and determine whether or not the project is on schedule and within budget. These data are drawn from tools such as OpenAir's Timesheets module, in which users enter the time they spend working on one or more specified projects and from OpenAir's Invoices module, in which a project's billable hours are calculated.

Projects Connector is flexible and provides multiple uses as listed below.

Push to OpenAir — Push a Microsoft Project plan to OpenAir. Lock the project when you push it and continue to update it in Microsoft Project. Alternatively, do not lock it when you push it to maintain the project in OpenAir.

Pull from OpenAir — Pull a project from OpenAir and make modifications in Microsoft Project. Company schedules and resource schedules are maintained. If the setting for user level planned hours is enabled in OpenAir, the hours are set as work hours in Microsoft Project. Lock the project in OpenAir when you pull it so you can push it back after you make changes in Microsoft Project. Alternatively, do not lock the project in OpenAir when you pull it into Microsoft Project. (You can still push it back to OpenAir as a new project or just work with a disconnected Microsoft Project file.)

Pull OpenAir resources — Pull OpenAir resources so that they are available in Microsoft Project. Company schedules and resource schedules are maintained. Assign OpenAir users to tasks in the Microsoft Project plan. Projects Connector checks schedules and verifies that there are no schedule differences when you push a project with assigned resources to OpenAir.

Map additional Microsoft Project task fields to OpenAir task fields and task and phase custom fields — Create custom fields in Microsoft Project and map them to OpenAir Fields before you push projects to OpenAir. Update custom field data in your Microsoft Project and the information and values transfer to the project in OpenAir. You can also map any Microsoft Project task or summary task field to an OpenAir custom task or phase field.

Schedule conflict checking — Check for resource schedule conflicts between Microsoft Project and OpenAir when you push projects to OpenAir. Discrepancies are itemized and displayed so plans can be synchronized.

Update a project in OpenAir from Microsoft Project revisions — Push Microsoft Project revisions to a locked project in OpenAir to update the project in OpenAir. OpenAir continues to collect information about hours worked, approved, and billed for that project. Refer to [Editing a Project in Microsoft Project](#).

Predecessor relationships — Push lag times and different predecessor relationships from your Microsoft Project plan to OpenAir. OpenAir supports Microsoft Project predecessors and you can create and edit them in the OpenAir Task grid. For example, use FS or Finish-to-Start, SS or Start-to-Start, FF or Finish-to-Finish, and SF or Start-to-Finish.

Time tracking — Use the OpenAir time tracking ability to log time against tasks in a project plan. OpenAir users' timesheets record time worked on tasks and assignments and time approved.

Actual hours worked — When you pull OpenAir timesheet hours to Microsoft Project, they can optionally become Actual Work hours.

Application Differences

There are fundamental differences between OpenAir and Microsoft Project in the way they each handle hours and tasks. These are reviewed in detail in a separate chapter on [Application Differences](#), but the following are most significant.

Task type — Use Microsoft Project's fixed units task type to ensure compatibility with OpenAir. Although Microsoft Project offers other task types, OpenAir treats all tasks as fixed units. For example, if you change the percentage of time a resource is assigned to a task in OpenAir, the duration is recalculated. The same recalculation occurs when you change fixed units in Microsoft Project.

Duration of tasks to duration of tasks — If you do not have the internal setting "Input planned hours for each user assigned to the task" enabled, when you push a Microsoft Project plan to OpenAir, duration of tasks becomes planned hours. To review a project's planned hours, navigate to Projects, select the project and use one of the options available to review planned hours.

Work hours from tasks to planned hours — If you have the internal setting "Input planned hours for each user assigned to the task" enabled, when you push a Microsoft Project plan to OpenAir, task work hours become planned hours in OpenAir. To review a project's planned hours, navigate to Projects, select the project and use one of the options available to review planned hours.

Project Plan Control

It is helpful to choose to control and maintain the primary project plan in either OpenAir or Microsoft Project. Changing elements of a project plan in both OpenAir and Microsoft Project can lead to irreconcilable discrepancies, and in some instances, duplicated transactional data such as timesheet hours and billable hours. In most cases, such duplicate entries are not possible because projects can be locked for editing in OpenAir and billable hours cannot be pushed into OpenAir from your Microsoft Project plan. To control a project using Microsoft Project, refer to the guidelines for [Editing a Project in Microsoft Project](#).

Target Audience

This document is intended for users who are authorized to exchange data between the Projects module in OpenAir and Microsoft Project using Projects Connector.

Document Contents


The following provides a brief description of what's included in this document.

- **Introduction** — includes introductory material and procedures for getting started. There are things to think about and do as you begin using Projects Connector. It also includes a description of the OpenAir toolbar that is added to the Microsoft Project toolbar when you install Projects Connector and tips on editing a project in Microsoft Project.
- **Installation** — includes steps for installing Projects Connector, installing a new version, and uninstalling the software.

- **Using Projects Connector** — Includes procedures for account settings, pulling project information from OpenAir into Microsoft Project, pushing Microsoft Project files to projects in OpenAir, pulling resource information from OpenAir in to Microsoft Project, and locking and unlocking projects in OpenAir.
- **References** — Includes frequently asked questions and answers, an explanation of resource assignment mapping, troubleshooting tips and instructions, and copyright material.

Definitions

- **Pull from OpenAir** — refers to a project plan or data being transferred from OpenAir to Microsoft Project.
- **Push to OpenAir** — refers to a project plan or data being transferred from Microsoft Project to OpenAir.
- **Project** — refers to all of the components that describe work to be accomplished such as what will be done, when, by whom, and at what cost. Since OpenAir terminology can be tailored by each company, your OpenAir account may use a different term in place of the word project such as case, job, or assignment.
- **Tasks** — refers to the jobs or work packages and activities that comprise a project. Since OpenAir terminology can be tailored by each company, your OpenAir account may use a different term in place of the word task.

 **Note:** It is beyond the scope of this document to provide procedures for using Microsoft Project. Refer to Microsoft Project documentation for more information.

Getting Started

With an account in OpenAir and Microsoft Project software installed, you can download Projects Connector and begin using them together to plan and manage projects. Perform the following steps.

Step 1: Download Projects Connector

Sign in to your OpenAir account. Go to Administration > Global Settings > Integration: Add-on services. Locate OpenAir Projects Connector and download it. Refer to [Installing Projects Connector](#) for more information.

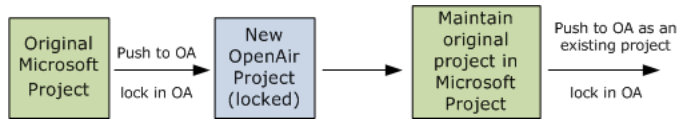
Step 2: Set up a project plan

Identify the tasks that need to be accomplished, when, and by whom. You can do this in either the Projects module in OpenAir or Microsoft Project.

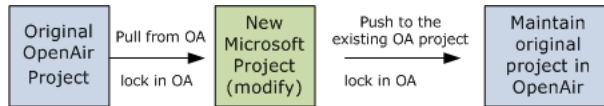
Step 3: Track progress

Track progress on an ongoing basis. Modify the project plan in OpenAir or Microsoft Project. There are different methods you can use.

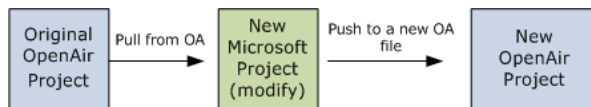
- Establish a project in Microsoft Project and push it to OpenAir. Lock it in OpenAir and continue to modify it in Microsoft Project. When updated, push it as an existing project to OpenAir.



- Establish a project in OpenAir and pull it into Microsoft Project. Lock it when you pull it, make modifications to it in Microsoft Project, and push the updated project back to OpenAir.



- Establish a project in OpenAir and pull it into Microsoft Project to use as a base for a new project. Do not lock it when you pull it and modify it in Microsoft Project. Push it to OpenAir as a new project.



You can exchange information between software products and use OpenAir resources and timekeeping capabilities. The following information may help you decide when you want to lock a project in OpenAir.

Action	Enables you to...
Push and Lock Microsoft Project to OpenAir	View project information in OpenAir, but not edit it. Hours worked, approved, and billed for that project are registered in OpenAir as usual, but you must make project plan changes to the name, planned hours, tasks, and assignments by modifying the project in Microsoft Project and pushing it to OpenAir. Locking the project ensures you can continue to push it from Microsoft Project to OpenAir.
Push and Do Not Lock Microsoft Project to OpenAir	Edit project information in OpenAir. Hours worked, approved, and billed for that project are registered in OpenAir as usual, and you can make project plan changes to the project name, planned hours, tasks, and assignments in OpenAir. You can pull the project to Microsoft Project as a new project to review progress.
<p>Note: If a project is pushed to OpenAir as Not Locked, a Microsoft Project file cannot be used subsequently to make changes to the originally created project in OpenAir.</p>	
Push into an empty project in OpenAir	Push existing Microsoft Project to empty unlocked project in OpenAir. (Empty projects in OpenAir do not have tasks or phases.)
Pull Project from OpenAir and Lock the OpenAir Project	Edit project information in newly pulled Microsoft Project, and since you locked the project in OpenAir, you can push updates back to the original project in OpenAir. You can view project information in OpenAir, but not edit it there until you unlock it.
<p>Note: You can pull any project from OpenAir into Microsoft Project, but only unlocked projects in OpenAir can be locked and linked to the newly created Microsoft Project file.</p>	

Step 4: Exchange project plan information

Use Projects Connector to enter account settings, pull resources, and push or pull a project. Refer to the following procedures.

- [Account Settings](#)

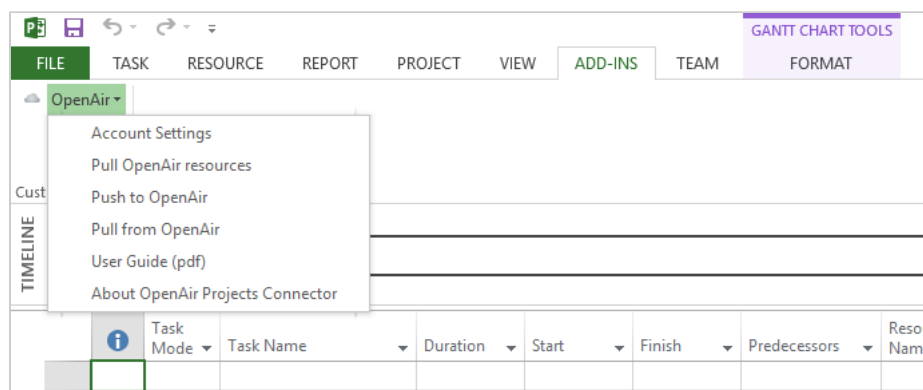
- Pull OpenAir Resources
- Map OpenAir Fields
- Push Microsoft Project file to a New Project in OpenAir
- Push Microsoft Project File to an Existing Project in OpenAir
- Push Microsoft Project File to a Project in OpenAir With Booked Users
- Pull a Project from OpenAir in to Microsoft Project
- Editing a Project in Microsoft Project

Note: When a new version of Projects Connector becomes available, you will be prompted to download it. Refer to [Installing a New Version](#) for more information.

OpenAir Toolbar

Once you install Projects Connector, the OpenAir Toolbar is added to the Microsoft Project application.

Click the OpenAir ToolBar to display the list of tasks you can perform using Projects Connector. Refer to the example and descriptions that follow.



Each option launches a window that helps you perform a task.

- **Account Settings** — Use this option to enter account information and establish a connection to your OpenAir account. Once connected, you have access to your OpenAir project information and resources information.
- **Pull OpenAir resources** — Use this option to pull or copy OpenAir resources into Microsoft Project. You can use these resources as you build your project plan in Microsoft Project and map them to OpenAir users when you push a project to OpenAir.
- **Push to OpenAir** — Use this option to push a project from Microsoft Project to the Projects module in OpenAir. Map Microsoft Project resources to OpenAir users, change priority levels, and map Microsoft task fields to OpenAir task or custom fields. Indicate whether you are locking the OpenAir project for future editing in Microsoft Project and if you are importing it to an existing project.
- **Pull from OpenAir** — Use this option to pull a project from OpenAir into Microsoft Project. Remember, a new project file is established in Microsoft Project even if you have an existing project file that corresponds to the project you are pulling. You can change priority levels and select settings to export actual work hours, although we recommended you do this with caution. Refer to [Pull a Project from OpenAir in to Microsoft Project](#) for more information. Indicate whether you are locking the project in OpenAir, which is recommended, so you can push it to the same project after editing it in Microsoft Project. You are also prompted to export OpenAir schedule information. We recommend this since it ensures an accurate timeline in Microsoft Project.

- **User Guide (pdf)** — Opens a browser with the Projects Connector documentation in PDF format.
- **About OpenAir Projects Connector** — Use this option to review information about OpenAir Projects Connector such as the version and to launch a log file that captures your operations. If you are experiencing a problem, refer to [Frequently Asked Questions](#) and [Troubleshooting](#).

Editing a Project in Microsoft Project

There are several guidelines for editing a project in Microsoft Project and exchanging the information with OpenAir.

- **Server use** — Always use the same OpenAir server after editing a project. While you may have a test account and a production account, push or pull the OpenAir project to or from that same server account after editing. Never update projects and push and pull them across multiple OpenAir servers because each server may assign a different internal ID to the same task.
- **Drag and drop** — Always use drag and drop when editing tasks in Microsoft Project. If you cut and paste tasks from one place to another in a project, the information OpenAir uses to identify a task can become corrupted.
- **Copy and paste** — It is a limitation of Projects Connector that when you copy and paste tasks from another project, you may get an error message in OpenAir. We recommend that you if you copy and paste tasks from one project to another, do not paste into the initial phase on the project list. Create a new phase and paste into that one. See [FAQ: Push and Pull Projects](#)
- **Fixed units task type** — Remember that OpenAir treats all task types as fixed units task types. So, to maintain project compatibility, we recommend using only the fixed units task type. Refer to [Application Differences](#) for more information.
- **Deleting a task** — Ensure that a task does not have OpenAir transactions associated with it before you delete it in Microsoft Project. If OpenAir does not allow you to delete a task, do not do it in Microsoft Project. While the task will be removed from the Microsoft Project file, it cannot be removed from OpenAir due to its association with invoicing, billing, or timesheets.
- **No overwrite** — Create a new project file when you pull a project from OpenAir to Microsoft Project. Do not overwrite an existing project file. When the file in OpenAir is locked, the new project file is automatically associated with the project it was pulled from in OpenAir. Make changes in Microsoft Project and push it back to the same project in OpenAir.

Installation

This chapter includes procedures for installing Projects Connector, installing a new version, and uninstalling Projects Connector.

- [System Requirements](#)
- [Installing Projects Connector](#)
- [Installing a New Version](#)
- [Uninstalling Projects Connector](#)

System Requirements

Projects Connector 4.4 or above requires:

- Microsoft Windows 8.1 or Microsoft Windows 10
- Microsoft Project 2013 (32/64 bit), Microsoft Project 2016 (32/64 bit) or Microsoft Project 2019 (32/64 bit)



Important: Older versions of Microsoft Windows and Microsoft Project are no longer supported. This includes:

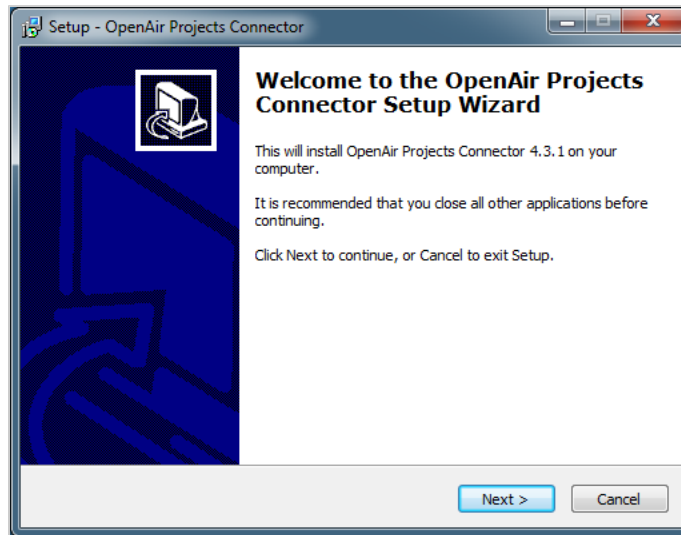
- Microsoft Windows XP, Microsoft Windows Vista and Microsoft Windows 7
- Microsoft Project 2002, Microsoft Project 2003, Microsoft Project 2007 and Microsoft Project 2010

Installing Projects Connector

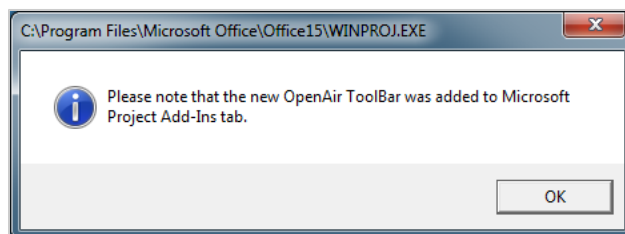
To exchange project information between the Projects module and Microsoft Project, install Microsoft project and then install the Projects Connector. The OpenAir toolbar is added to the Microsoft Project toolbar.

To download and install Projects Connector:

1. Sign in to your OpenAir account. Go to Administration > Global Settings > Account > Integration: Add-on services. Locate Projects Connector.
2. Click the **Download** link.
3. Click **Save File** and specify a location.
When download is complete, the download complete message displays.
4. Locate **OpenAirProject.exe** and double-click on it.
A security warning may appear. Accept the program.
The **Setup - OpenAir Projects Connector** screen appears.



5. Click **Next**.
The **License Agreement** appears.
6. Click the **I accept the agreement** radio button.
7. Click **Next**.
The **Select Destination Location** window appears. Accept the location or change it.
8. Click **Next**.
The **Ready to Install** screen appears, showing the Destination location and Additional tasks, if there are any.
9. Click **Install**.
An information window with README.TXT appears.
10. Read the document and click **Next**.
The **Completing the OpenAir Projects Connector Setup Wizard** window appears.
11. Click **Finish**.
An OpenAir dropdown list is added to the Microsoft Project toolbar. A message will appear when you open Microsoft Project, confirming that the OpenAir ToolBar was added.



Installing a New Version


When using Projects Connector with Microsoft Project, you are prompted to download a new version when it becomes available. We recommend that you upgrade and take advantage of the new features, software fixes, and product enhancements.

To install a new version:

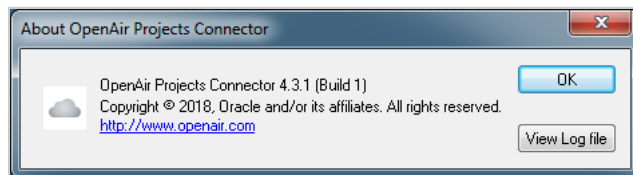
1. Open the Microsoft Project software.
2. Click the OpenAir dropdown list, select Account Settings, and connect to your OpenAir account. Refer to [Account Settings](#) for more information.
3. Click the OpenAir dropdown list and select any of the actions such as Pull OpenAir resources, Push to OpenAir, or Pull from OpenAir.
(If you are not using the latest version of Projects Connector, a window appears asking you to download the latest version.)
4. Click Yes to continue.

Note: If you had been using an older version of Projects Connector, you may receive a message indicating that the standalone Wizard mode is no longer supported. Instead, we request that you use the OpenAir toolbar within Microsoft Project and need to uninstall the previous version. Click Yes to continue.

1

5. When the setup window displays, click Next to continue.
You may be prompted to exit Microsoft Project.
6. Click OK and exit Microsoft Project before continuing.
Refer to [Installing Projects Connector](#) for more information about the Setup Wizard and installation. When installation is complete, readme.txt displays and lists the most recent fixes and enhancements.
7. Open Microsoft Project software. To verify that it is updated, click  and click **About OpenAir Projects Connector**.

The **About OpenAir Projects Connector** window appears, listing the version number.

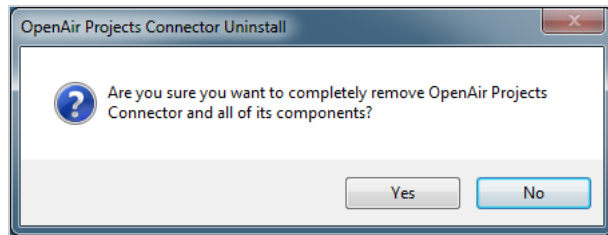


Uninstalling Projects Connector

When a new version of Projects Connector is available, you do not need to uninstall the version you are using. Simply download the new version and the functionality updates. However, if you will no longer be using Projects Connector, you may want to uninstall it.

To uninstall Project Connector:

1. Go to the Windows Start menu.
2. Select Settings > Control Panel and click Programs and Features.
A list of the programs on your computer displays.
3. Double-click OpenAir Projects Connector [version number].
4. Click Uninstall.
A prompt displays to verify the action.



5. Click Yes.

The OpenAir toolbar no longer appears on the Microsoft Project toolbar.

Note: If you receive a message that some components can only be removed manually, click OK. Navigate to where your Projects Connector files are located and manually remove any folders and their contents.

Using Projects Connector

You can use Projects Connector to exchange project and resource information between Microsoft Project and OpenAir and to lock and unlock projects in OpenAir. Refer to the following procedures.

- [Account Settings](#)
- [Pull OpenAir Resources](#)
- [Push Microsoft Project file to a New Project in OpenAir](#)
- [Push Microsoft Project File to an Existing Project in OpenAir](#)
- [Push Microsoft Project File to a Project in OpenAir With Booked Users](#)
- [Pull a Project from OpenAir in to Microsoft Project](#)
- [Map OpenAir Fields](#)
- [Unlock a Project in OpenAir](#)
- [Lock a Project in OpenAir](#)
- [Installing a New Version](#)



Warning: When editing a file in Microsoft Project:

- Use Drag and Drop to move tasks from one area to another. DO NOT USE cut and paste.
- Do not delete a task in a Microsoft Project file that has OpenAir transactions.
- Do not pull a project from one OpenAir server and then subsequently push it to a different OpenAir server. Always work with the same OpenAir server.

Account Settings

Before you can exchange information between Microsoft Project and OpenAir, you need to sign in to your OpenAir account. The Account Settings window launches from the OpenAir toolbar.

To access your OpenAir account:

1. Click the OpenAir toolbar and select Account Settings.
The **Please enter your OpenAir account information** window appears.

2. **Server** — Enter the URL for your OpenAir Account. The server URL includes the domain name your OpenAir account <account-domain>. For more information about your account-specific domain name, see the help topic [Your Account URLs](#).
3. Click **OK**. In most cases, Account ID is left blank.

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You are connected to your OpenAir account.

Note: This connection remains active while Microsoft Project is open and you can perform multiple tasks. When you close Microsoft Project and re-open it, you must reenter your password unless you checked the Remember Password check box.

Pull OpenAir Resources

Many companies use OpenAir for keeping track of resources and timesheet hours. You can pull OpenAir resource information, including company and resources schedules, into a Microsoft Project Resources files. This provides an easy way to assign OpenAir resources to tasks in a Microsoft Project plan.

Note: The following procedure is not used when your OpenAir company settings require that only "booked users" or "booked users or all users if none are booked" are available for assignment. In that situation, you pull available resources when you push a Microsoft Project plan to OpenAir.

To pull OpenAir resources:

1. Open Microsoft Project software.
2. Click the OpenAir ToolBar, select Account Settings, and enter your OpenAir account information.

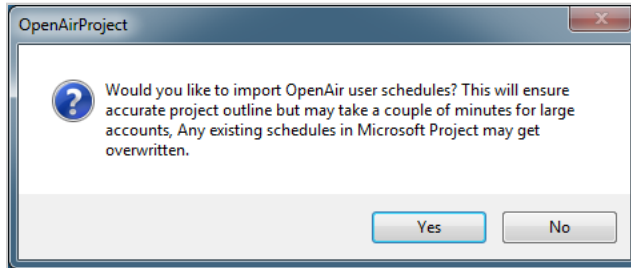
Refer to [Account Settings](#) for more information.

3. Click the OpenAir ToolBar and select Pull OpenAir resources.

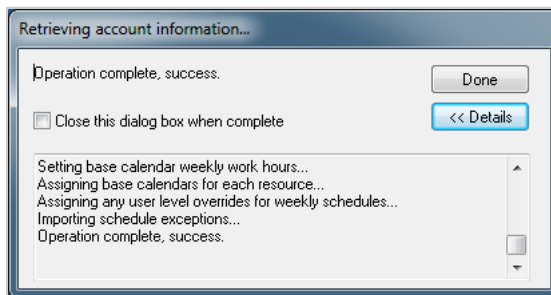
If your OpenAir account is configured to filter OpenAir resources based on booking status, the following message appears.

- Your OpenAir account is configured to filter OpenAir resources based on their booking status. When you push a Microsoft Project to OpenAir, you will be given an option to populate Microsoft Project resources based on their booking status in OpenAir.

If your account is not configured to filter OpenAir resources based on booking status, the following prompt displays.

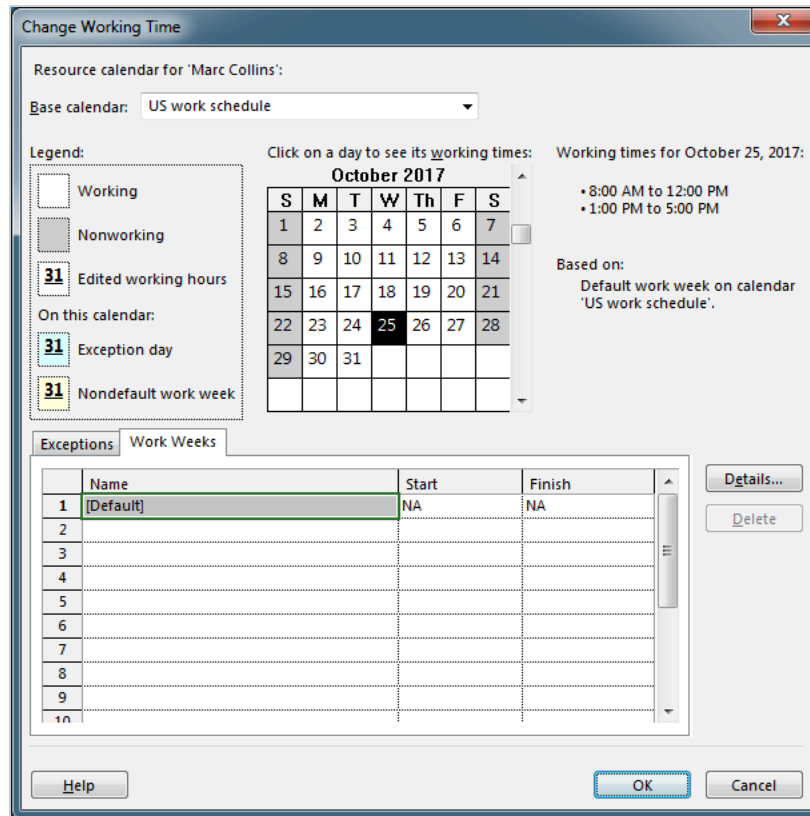


4. Click Yes (recommended). OpenAir company schedules and resource schedules are maintained when you pull them into Microsoft Project.
5. Retrieving account information window displays and provides status of the operation.



6. Click Done or select the check box to Close this dialog box when complete and it closes automatically. OpenAir user information was downloaded and is now available in Microsoft Project Resources.
7. To view resources in Microsoft Project, click View and select Resource Sheet.

The resources you've pulled in from OpenAir display. To check schedules, right click on a Resource Name and click Information. Then, click the Change Working Time button.



Push Microsoft Project file to a New Project in OpenAir

You can create a new project in OpenAir by pushing a Microsoft Project file into OpenAir. This allows you to work in Microsoft Project, set up your timeline, assign users to tasks, set up custom fields and map them to OpenAir custom fields, check schedules, push the project into OpenAir, and maintain it in either OpenAir or Microsoft Project.

To create a new project in OpenAir from a Microsoft Project file:

1. Open the Microsoft Project file you wish to push to OpenAir.
2. Click the OpenAir ToolBar, select Account Settings, and enter your OpenAir account information. Refer to [Account Settings](#) for more information.
3. Click the OpenAir ToolBar and select Push to OpenAir. Retrieving account information window displays. Click Done or it closes automatically. OpenAir Import Settings window displays.

Note: Note: Clear check boxes if selected from previous task.

OpenAir Import Settings

Enter the name of OpenAir Project to be created:
Altima Technologies - Integration

Please select a OpenAir client:
[Select...] Refresh

Please select a OpenAir project stage:
Administrative

Map OpenAir and Microsoft Project resources

Microsoft Project Resource	OpenAir Employee
Analyst	Analyst
Bill Carr	Bill Carr
Bill Humber	Bill Humber
Brian Dates	Brian Dates
Client	Client

Lock OpenAir project. (Future edits in MS Project) Advanced...

Import to existing OpenAir project

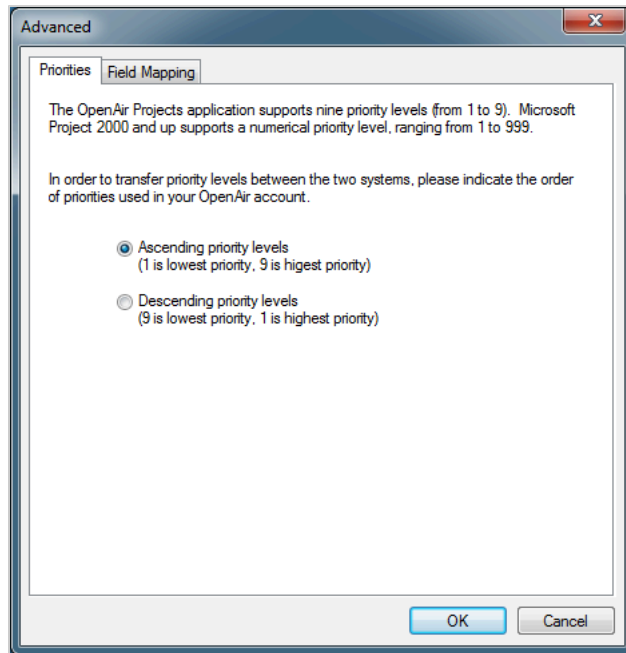
Check Schedules Cancel OK

Note: If your OpenAir company settings allow assignment of only booked users, refer to [Push Microsoft Project File to a Project in OpenAir With Booked Users](#). If your OpenAir company settings allow assignment of only booked users or all if none are booked, you are prompted to populate available resources in Microsoft Project. Click Yes to continue.

4. The name of the Microsoft Project file displays as the project in OpenAir to be created. Accept this name or change it.
5. Select an OpenAir customer using the drop-down list.
6. Select an OpenAir stage using the drop-down list.
7. Ensure Microsoft Project Resource names are mapped to the correct OpenAir User. To change a name, click on the OpenAir User name and a drop-down list displays OpenAir users. Mapping is automatic if the names match.

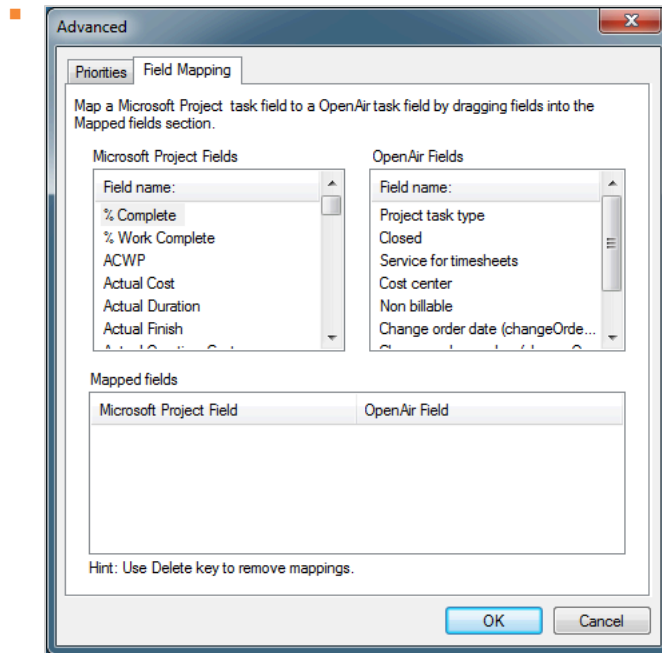
For information about how mapping works, refer to [Resource Assignment Mapping](#).

8. To change priority levels, click Advanced and select the Priorities tab. Select the option that indicates how priority levels are used in your OpenAir account. Ascending priority levels is the default.



9. To map OpenAir custom fields to Microsoft Project Fields, click Advanced and select the Field Mapping tab. Once mapped for a project, custom fields are populated automatically in OpenAir with data from corresponding fields in the Microsoft Project file. For help on field mapping, refer to [Map OpenAir Fields](#).

- i **Note:** You can map Microsoft Project built-in task-related fields such as WBS, as well as custom fields you create, to specific OpenAir fields. You could create a custom field in OpenAir to hold the built-in Microsoft WBS code.
- Once custom fields have been created in either Microsoft Project or in OpenAir, drag the Microsoft Project Fields into the Mapped fields section and then drag a corresponding OpenAir field, placing it to the right.
- When finished with all mapping, click OK. Refer to the following example.

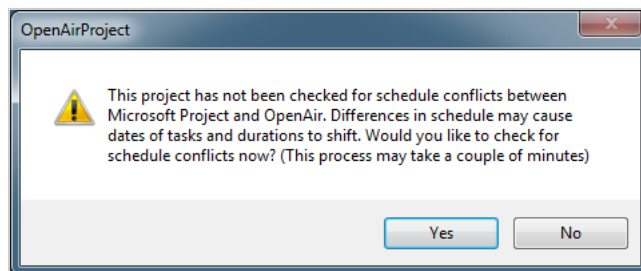


10. To lock the file in OpenAir, select the check box to Lock OpenAir project. (Future edits in MS Project).

Note: If you want to update the plan in Microsoft Project, lock the project in OpenAir. You will be able to view all project information in OpenAir, and hours worked, approved, and billed will calculate in OpenAir for the locked project. After you update project timeline and task information in Microsoft Project, you push it back to OpenAir to keep them in sync.

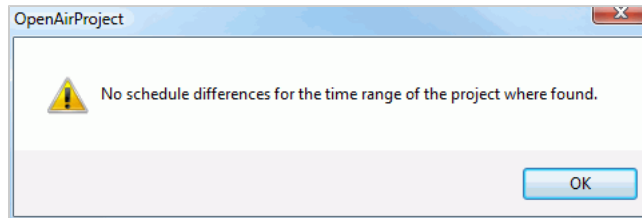
11. Do not select the check box to Import to existing project in OpenAir since you are creating a new project in OpenAir. For instructions on working with an existing project, refer to [Push Microsoft Project File to an Existing Project in OpenAir](#).
12. Click Check Schedules.

If you do not click Check Schedules, the following prompt displays.



13. Click Yes to check schedules (recommended) or No.

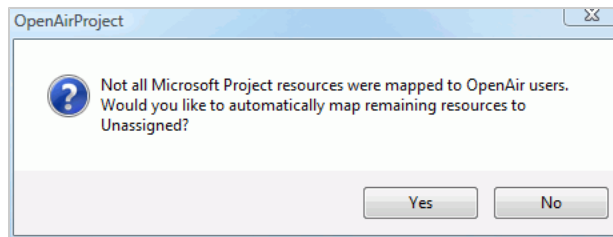
The following message displays when there are no schedule differences. If there are differences, a schedule exception message displays.



14. Click OK.

The Microsoft project is pushed to OpenAir. Click Done or it closes automatically.

Note: If you did not map all resources, a prompt displays.

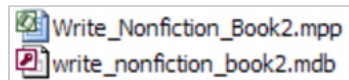


Click Yes to map users to Unassigned or No and then go back and map the unassigned users. If you click Yes, you are prompted to check again for schedule conflicts.

15. Click Done or it closes automatically.

The Microsoft Project file has been pushed to OpenAir. Notice that an additional file has been added to your Microsoft Project directory with an .mdb extension.

Important: You must keep the Microsoft Project .mpp file in the same directory as the .mdb file to be able to push an updated project file to OpenAir.



Push Microsoft Project File to an Existing Project in OpenAir

You can push a Microsoft Project file to a locked project or an empty (a project with no tasks or phases) in OpenAir. This allows you to edit the project file in Microsoft Project and then push the updates to OpenAir while using OpenAir's capability to keep track of hours worked, approved, and billed for that project.

Important: Always use drag and drop when editing a Microsoft Project file, and never delete a task from Microsoft Project that has OpenAir transactions associated with it.

To push a Microsoft Project file to a locked or empty project in OpenAir:

1. Open the Microsoft Project file you wish to push to OpenAir.
2. Click the OpenAir ToolBar, select Account Settings, and enter your OpenAir account information. Refer to [Account Settings](#) for more information.

3. Click the OpenAir ToolBar and select Push to OpenAir.

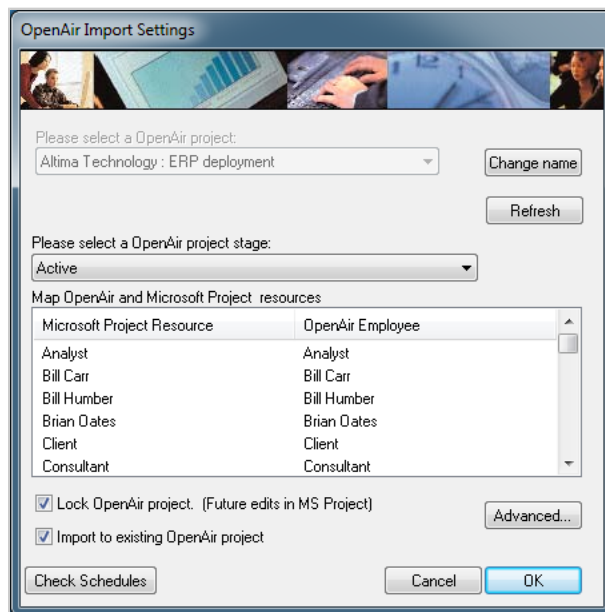
Retrieving account information window displays.

OpenAir Import Settings window displays with settings from the previous task.

Note: Depending on your OpenAir company settings for filtering resources based on booking status, a prompt may display asking if you would like to populate available resources in Microsoft Project. Click Yes to have booked users available as resources in Microsoft Project.

4. Select the check box to Import to existing OpenAir project.

The name of the customer and project display in gray color when the check box is selected to Import to existing OpenAir project. The file name is the Microsoft Project file name that was originally pushed to OpenAir.

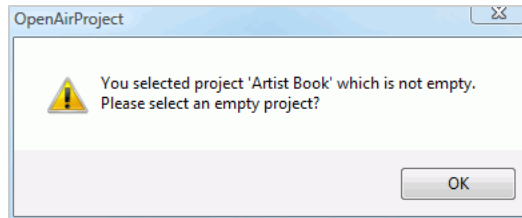


5. Select the check box to Lock OpenAir project. (Future edits in MS Project). This ensures you can maintain the project in Microsoft Project and push updates to OpenAir.
6. Change any resource mapping or advanced settings. Refer to [Push Microsoft Project file to a New Project in OpenAir](#) for information on mapping OpenAir and Microsoft Project resources and advanced settings.
7. Click Check Schedules.

The following message displays when there are no schedule differences. If there are differences, a schedule exception message displays.



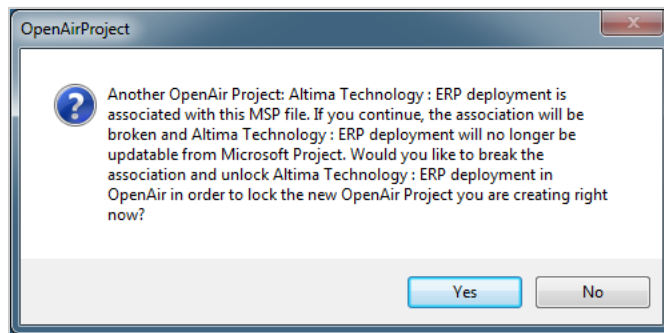
8. Click OK. If you attempt to import an unlinked Microsoft Project to a project in OpenAir that is not empty (has no tasks or phases), a message displays.



9. Click OK to close the message.

Note: If you want to update this unlocked project in OpenAir, you need to pull a new copy of it into Microsoft Project and lock the project in OpenAir when you pull it into Microsoft Project. Once you have updated that file, you can push it to the same project file in OpenAir. Refer to [Pull a Project from OpenAir in to Microsoft Project](#).

10. If you do not select the check box to Import to an existing OpenAir project but select Lock OpenAir project, a message displays warning you that the association between the Microsoft Project file created with the existing project in OpenAir will be broken and no longer usable.



11. Click No to maintain the association between the Microsoft Project file and existing project file. If you want to push it and create a new file, click Yes.

Push Microsoft Project File to a Project in OpenAir With Booked Users

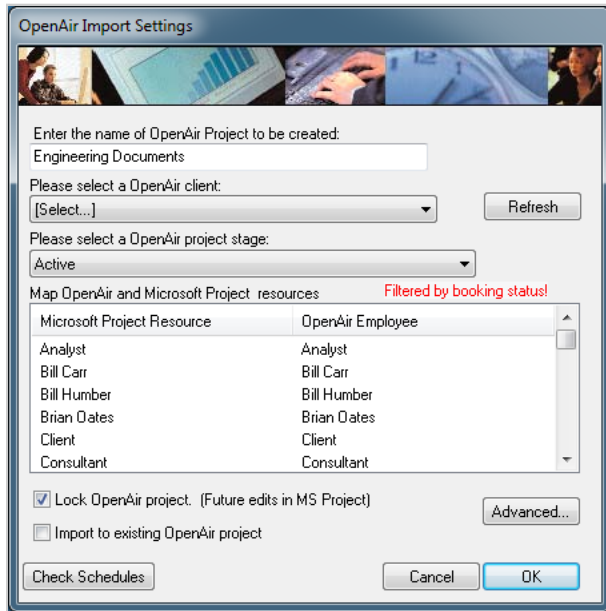
This procedure addresses creating and assigning resources to a new project in OpenAir when your OpenAir company settings require that only booked resources are available for assignment.

While the procedure is similar to pushing an Microsoft Project file to OpenAir, the work flow is somewhat different. An extra step ensures that only booked OpenAir resources are assigned to tasks. Once the project is established and resources are assigned to tasks, you can maintain it in either OpenAir or Microsoft Project.

To create a new project in OpenAir and assign booked resources:

1. Open the Microsoft Project file you wish to push to OpenAir.
2. Click the OpenAir ToolBar , select Account Settings, and enter your OpenAir account information. Refer to [Account Settings](#) for more information.
3. Click the OpenAir ToolBar and select Push to OpenAir. Retrieving account information window displays.

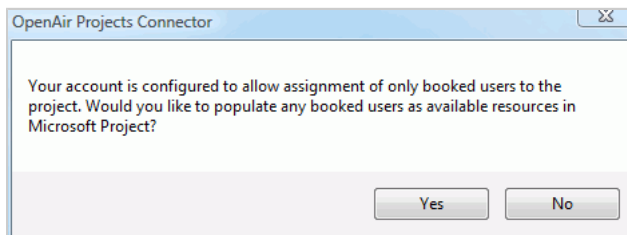
OpenAir Import Settings window displays. Clear check boxes if checked from previous task.



Note: Because OpenAir company settings allow only booked users to be available for assignment to a project, “Filtered by booking status!” appears on the OpenAir Import Settings window.

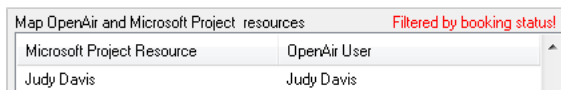
4. Make changes as necessary to OpenAir project to be created, OpenAir client, and OpenAir project stage.
5. Select the check box to Lock OpenAir project.
6. Click OK to push the project to OpenAir.
7. Sign in to OpenAir and follow the procedure to create bookings for the selected resources. Click Save. Once resources are booked in OpenAir, they are available in Microsoft Project.
8. Return to Microsoft Project. Click the OpenAir ToolBar and select Push to OpenAir. Ensure the check box is selected to Import to existing OpenAir project.

The following prompt displays.



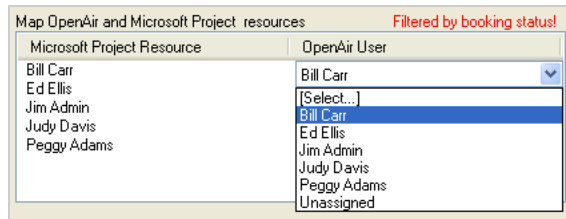
9. Click Yes.

The OpenAir Import Settings window displays Microsoft Project Resources and OpenAir Users that are booked and available for assignment.



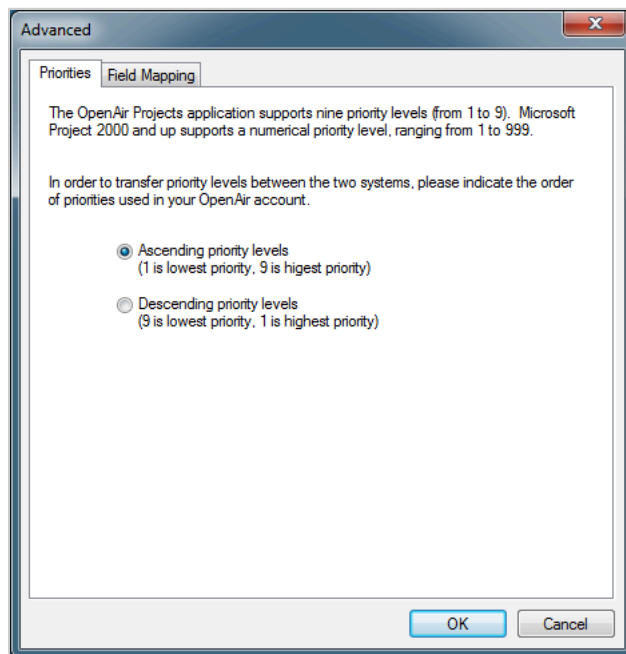
Note: You can assign resources to tasks in Microsoft Project. Simply cancel, assign resources, and push the project again. Ultimately, when the OpenAir company settings allow only booked users to be available for assignment to a project, bookings also need to be created in OpenAir.

- To change the mapping of a Microsoft Project Resource name to a different OpenAir User, click on the OpenAir User name and a drop-down list of booked users available for assignment displays. Mapping is automatic if the names match.

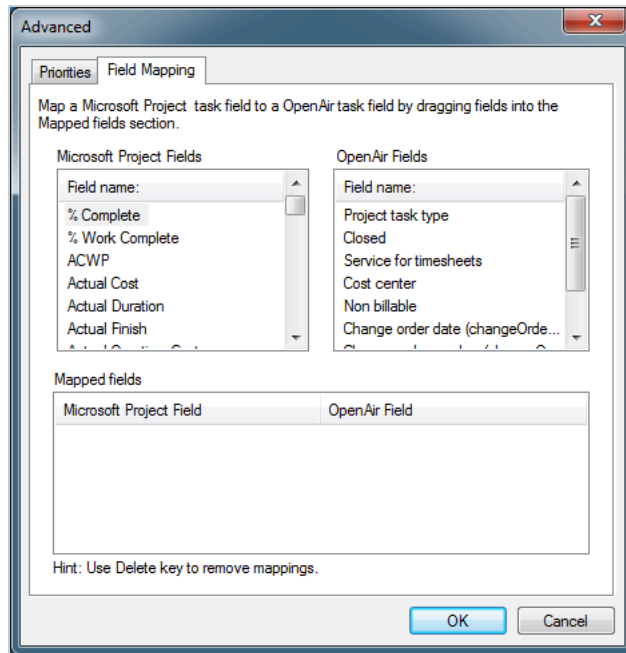


For information about how mapping works, refer to [Resource Assignment Mapping](#).

- To change priority levels, click Advanced and select the Priorities tab. Select the option that indicates how priority levels are used in your OpenAir account. Ascending priority levels is the default.

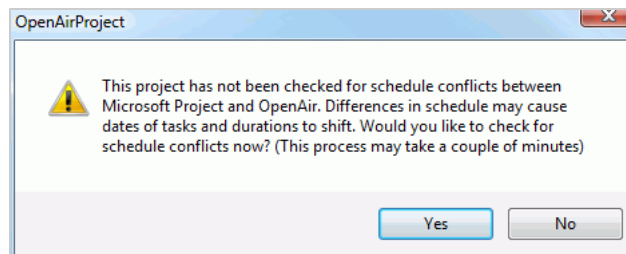


- To map OpenAir custom fields to Microsoft Project Fields, click Advanced and select the Field Mapping tab. Once mapped for a project, custom fields are populated automatically in OpenAir with data from corresponding fields in the Microsoft Project file. Refer to [Map OpenAir Fields](#). Once custom fields have been created in either Microsoft Project or in OpenAir, drag the Microsoft Project Fields into the Mapped fields section and then drag a corresponding OpenAir field, placing it to the right. When finished with all mapping, click OK. Refer to the following example.

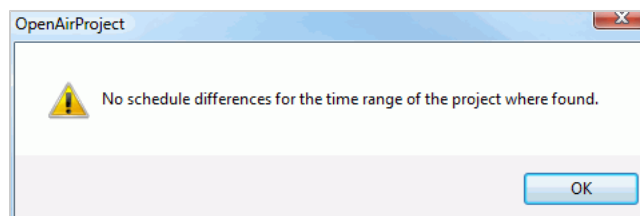


Note: You can map Microsoft Project built-in task-related fields such as WBS, as well as custom fields you create, to specific OpenAir fields. You could create a custom field in OpenAir to hold the built-in Microsoft WBS code.

13. Select the check box to Lock OpenAir project. (Future edits in MS Project) if you want to update the plan in Microsoft Project.
14. Select the check box to Import to existing OpenAir project since the project has been pushed to OpenAir.
 1. Click Check Schedules. If you do not click Check Schedules, the following prompt displays.



2. Click Yes to check schedules (recommended) or No. The following message displays when there are no schedule differences. If there are differences, a schedule exception message displays.



15. Click OK.

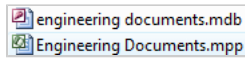
The Microsoft project is pushed to OpenAir.

16. Click Done or it closes automatically.

The Microsoft Project file has been pushed to OpenAir. Notice that an additional file has been added to your Microsoft Project directory with an .mdb extension.



Important: You must keep the Microsoft Project .mpp file in the same directory as the .mdb file to be able to push an updated project file to OpenAir.



Pull a Project from OpenAir in to Microsoft Project

When you pull a project from OpenAir to Microsoft Project, a new project file is created. Do not overwrite an existing project file. When the file in OpenAir is locked, the new file created from the pull procedure is automatically associated with the project it was pulled from in OpenAir. You can make changes to it and push it back to OpenAir. You can also choose to pull only the resources that are assigned to the project.

To pull a project from OpenAir into a new Microsoft Project:

1. Open Microsoft Project software.
2. Click the OpenAir ToolBar , select Account Settings, and enter your OpenAir account information. Refer to [Account Settings](#) for more information.

3. Click the OpenAir ToolBar and select Pull from OpenAir.

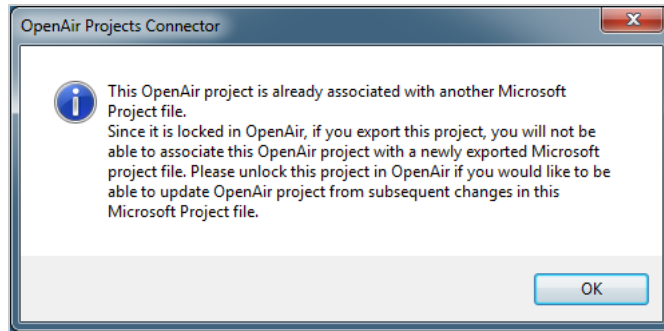
A blank Microsoft Project file is opened. Retrieving account information window displays and provides status of the operation. Click Details if you do not wish to display operation information.

4. Click Done or select the check box to Close this dialog box when complete and it closes automatically. OpenAir Export Settings window displays. It displays the selection from the previous task or Select if you've just launched Microsoft Project software.



5. Select a project using the drop-down list. These are the projects in your OpenAir account.

Note: If you select a project that is locked in OpenAir and already associated with another Microsoft Project file, the following message displays.



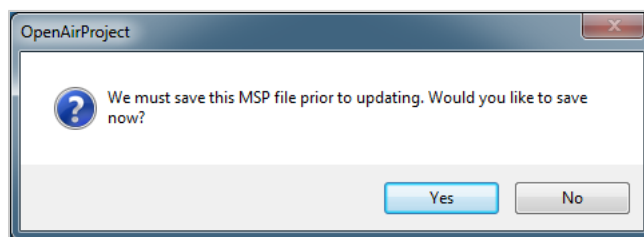
- Click OK. Your choices are to select another project, [Unlock a Project in OpenAir](#) before you pull it, or continue to pull it even though it is locked.

Note: If you unlock it in OpenAir, repeat the procedure. Click the OpenAir ToolBar, select Pull from OpenAir, and select the project you want to pull from OpenAir .

If you do not unlock it first and continue to pull it to Microsoft Project even though it is associated with another Microsoft Project file, you will not be able to lock again and push it back to the same project in OpenAir.

- Select the check box if you want to Lock this project in OpenAir after exporting to allow re-importing back into OpenAir from Microsoft Project.
- If you need to alter advanced options, click Advanced and refer to [Pull from OpenAir Advanced Options](#). From this tab, you can set priority levels to be ascending or descending, change the settings for handling the export of timesheet hours, and limit the number of resources pulled to those specifically assigned to the project you are pulling.
- Click OK.

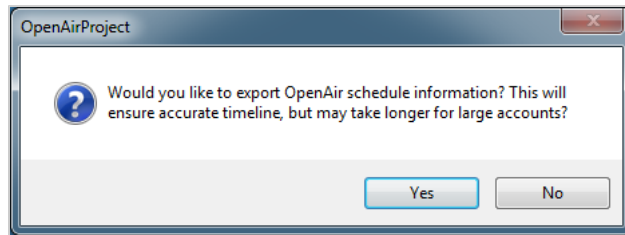
A prompt displays to give the file you are pulling a filename.



- Click Yes and type a file name, and click Save. If you originally pushed the project to OpenAir, do not overwrite the original Microsoft Project file name.

Note: **NEVER** overwrite or save over the original Microsoft Project file! Your data will be corrupted and the file will become unusable. Refer to [Frequently Asked Questions](#) for more information. Since you are pulling the project from OpenAir, it will automatically be associated with the Microsoft Project file unless you did not lock the project when you began pulling it. The connector catches this condition and will not allow you to damage your projects in OpenAir.

- You are prompted to export OpenAir schedule information. This is recommended as it ensures an accurate timeline. Click Yes.



The project is pulled from OpenAir and displays in the Microsoft Project file.

Pull from OpenAir Advanced Options

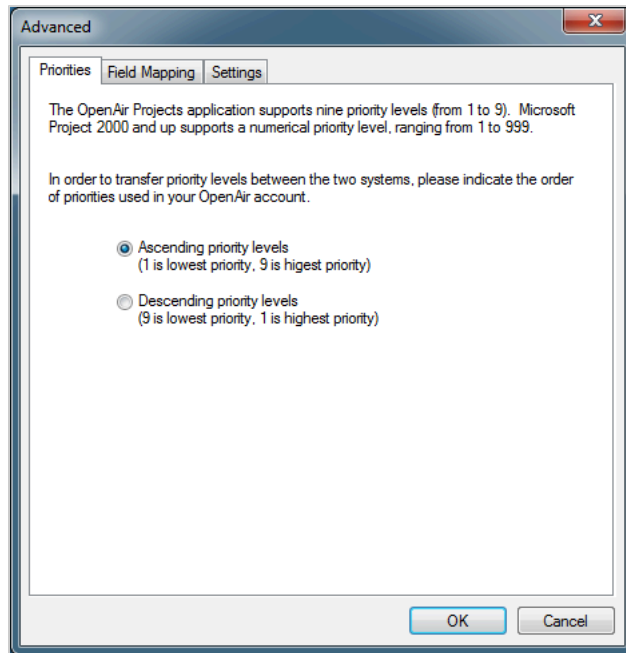
This information supports the Advanced functionality associated with [Pull a Project from OpenAir in to Microsoft Project](#). It includes changing priority levels and settings for handling timesheet hours. You can also choose to export only assigned OpenAir resources when you pull a project from OpenAir into Microsoft Project.

To change priorities or settings:

1. Click Advanced on the OpenAir Export Settings window.

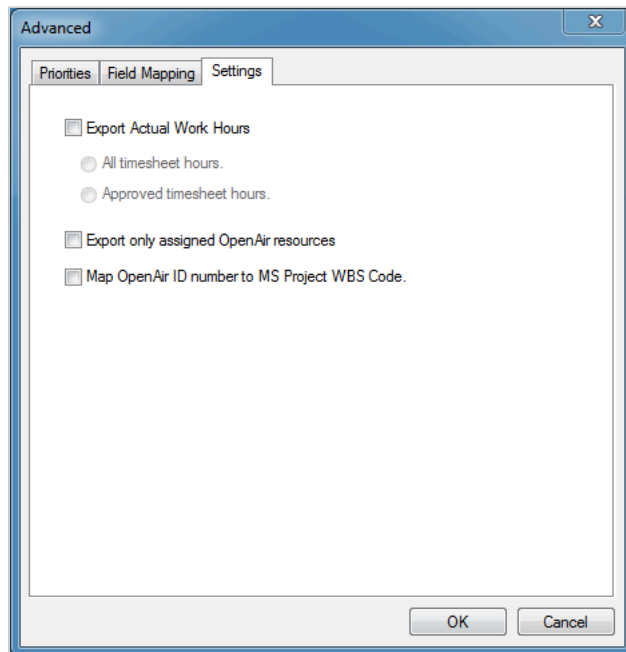


2. To change priority levels, select the Priorities tab. Select the option that indicates how priority levels are used in your OpenAir account. Ascending priority levels is the default.



- To specify how to export resources and hours as well as mapping the OpenAir ID to the Microsoft Project WBS Code, select the Settings tab.

The settings window displays.



- To export only assigned OpenAir resources, select the check box Export only assigned OpenAir resources.

Only the resources assigned in the project are exported to Microsoft Project.

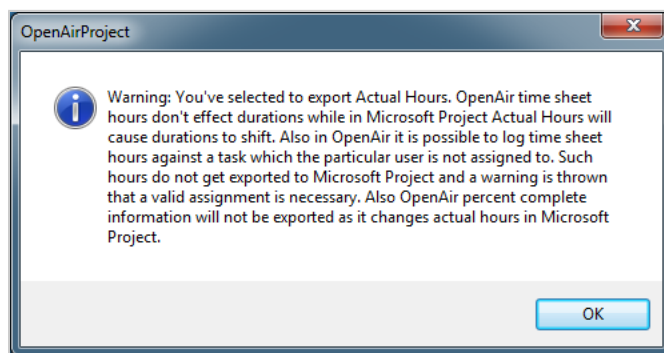
- To export OpenAir timesheet hours into Microsoft Project as actual work hours, select the check box Export Actual Work Hours.

By default, Export Actual Work Hours is not selected when this window displays.

Note: Keep in mind that when you export worked hours from OpenAir to Microsoft Project actual work, the OpenAir worked hours cause durations to shift in Microsoft Project. The results may be confusing. In OpenAir, worked hours do not affect the duration, but in Microsoft Project, actual work hours are automatically considered part of work hours and these affect duration changes. There could also be a situation where in OpenAir, users log time against a task they are not assigned to. When the project is pulled into Microsoft Project, those hours are not exported since they are not against an assigned task and a warning is issued. Finally, OpenAir percent complete information is also not pulled since it changes actual work in Microsoft Project, and subsequently causes durations to change.

- If you want to continue, select either the Approved timesheet hours or All timesheet hours option. Click OK.

A Warning message displays.



- To continue, click OK or to cancel out of the window.
- To map the OpenAir ID number to the Microsoft Project WBS code, select the check box and click OK.

Note: This feature only works when pulling a project from OpenAir into Microsoft Project file. Please note that when the Microsoft Project file is pushed back into OpenAir, the OpenAir ID number will be overwritten with the Microsoft Project sequence number of the task. We recommend saving the Microsoft Project WBS code into a project task custom field as described in the next section. See [Map OpenAir Fields](#).

- To continue pulling a project from OpenAir into Microsoft Project, refer back to the [Pull a Project from OpenAir in to Microsoft Project](#) procedure.

Map OpenAir Fields

When you push Microsoft Project files to OpenAir, you can map Microsoft Project built-in task-related fields such as WBS, as well as custom fields you create, to specific OpenAir fields. OpenAir fields available automatically include the terminology, settings, and custom fields your company uses. All of these fields display in the Field Mapping window.

To map OpenAir fields, create custom fields in Microsoft Project, apply them in your Microsoft Project plan, and then map them to OpenAir fields when you push the project to OpenAir. You only do this once since Projects Connector remembers the mapping.

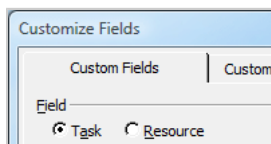
Note: When you create the custom fields in Microsoft Project, make sure they are identical to the terminology used in OpenAir. If you copy a project that has custom fields, they also copy into the new project.

It is useful to map three specific OpenAir fields: Closed task, Project task type, and Activity for timesheets. Each is defined as follows.

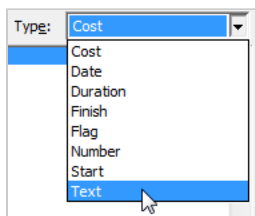
OpenAir Fields	OpenAir Field Selections
Closed task	1 = closed and 0 = open
Project task type	Task Type A, Task Type B, and Task Type C
Activity for timesheets	Data Analysis, Implementation, Planning, Proj Mgmt, Research, and Training

To create custom fields in Microsoft Project and map them to OpenAir Fields:

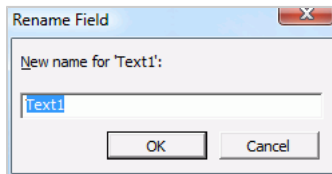
1. In Microsoft Project, click on Tools and select Customize and the Fields option.
Customize Fields window displays.
2. Click the Custom Fields tab and select the Task option.



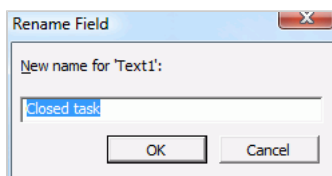
3. Use the Type drop-down list and select Text.
A list of Text[#] custom fields displays with an available one highlighted.



4. Click Rename.
Rename window displays.

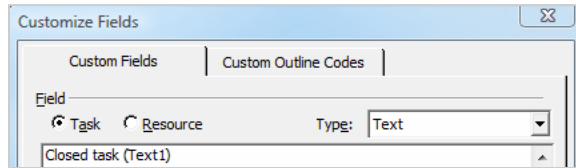


5. Type the new name and click OK. In this example, we are going to create a custom field for Closed task.



- Click OK.

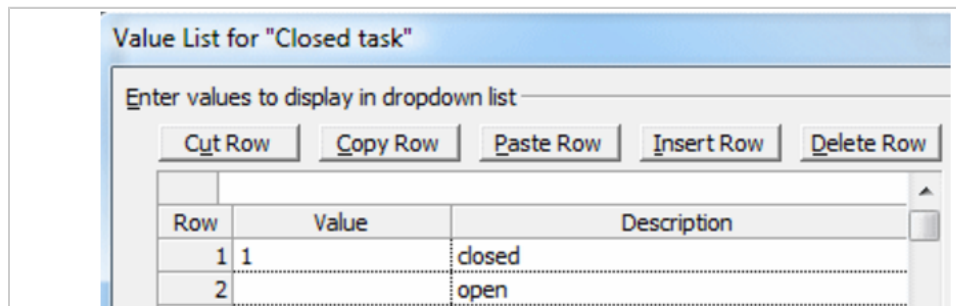
The new name displays in the list with the old name in parenthesis.



- Click Value List to assign OpenAir values.

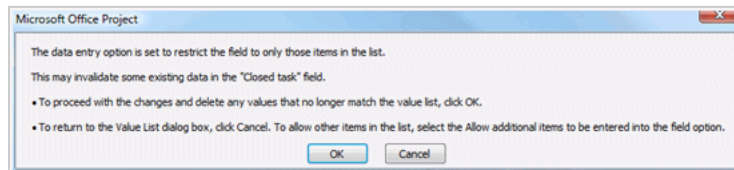
Value List for the custom field you are creating displays.

- Type information for the Value and Description fields. In this example, we type 1 for closed and leave it blank for open, which correlates to a zero in OpenAir.



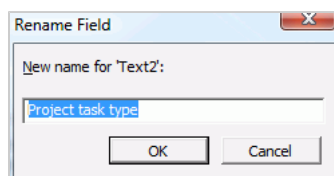
- Click OK.

The following message displays.

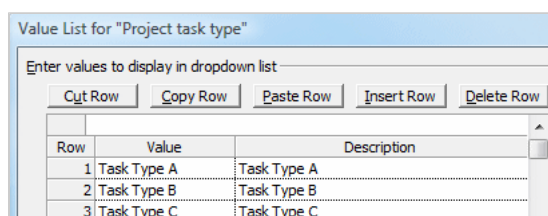


- Click OK to accept the condition.

- Create another custom field for Project task type. Select the next Text[#] available and click Rename. Type Project task type and click OK.

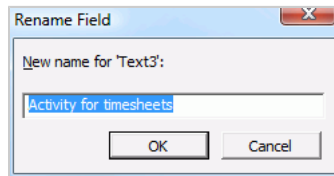


- Click Value List and enter the OpenAir values. Refer to the following example.

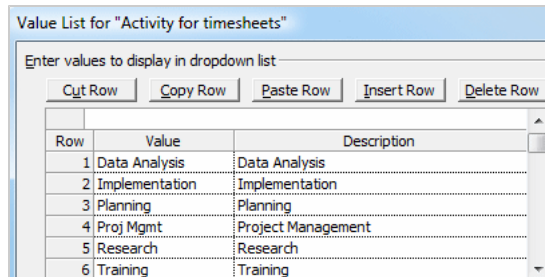


- Click OK and click OK again.

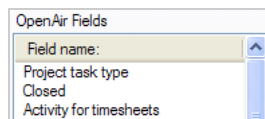
14. Create another custom field for Activity for timesheets. Select the next Text[#] available and click Rename. Type Activity for timesheets and click OK.



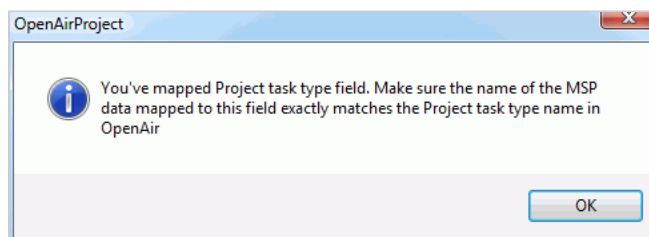
15. Click Value List and enter the OpenAir values. Refer to the following example.



16. Click OK and click OK again. Continue adding custom fields or click OK to exit the window.
17. When you select Push to OpenAir, click Advanced and select the Field Mapping tab. The custom fields you entered display under OpenAir Fields.



18. To map the custom fields to Microsoft Project Fields, locate them in the Microsoft Project Fields list and drag them to the Mapped fields section below. Drag the corresponding OpenAir field. Each time you map a field, a confirmation message displays.

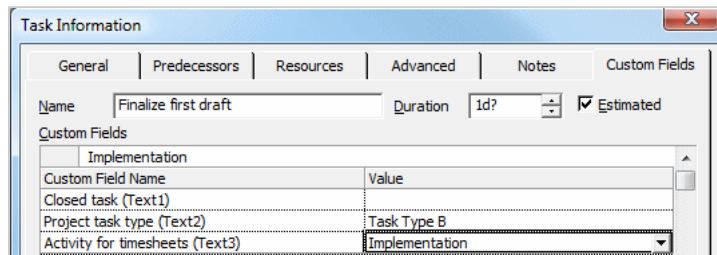


This is the result.

Microsoft Project Field	OpenAir Field
Project task type (Text2)	Project task type
Closed task (Text1)	Closed
Activity for timesheets (Text3)	Activity for timesheets

Continue mapping fields or click OK and finish completing the Push to OpenAir. Refer to [Push Microsoft Project file to a New Project in OpenAir](#) for more information.

Note: To apply custom fields to a task in your Microsoft Project plan, open the Task Information window and click the Custom Fields tab. Use the drop-down lists under value to select the value that applies to the task. Refer to the following example.



Unlock a Project in OpenAir

A locked project can be unlocked in OpenAir with functionality provided by an internal switch. When the switch is enabled, a link displays in hints for the Properties form (new UI) or the Edit project form. Or, when a project in OpenAir is linked to a Microsoft Project file, you can re-run Projects Connector.

To unlock a project in OpenAir:

1. [Creating a Support Case](#) and request that the following switch be enabled: Enable unlocking of projects (locked by OpenAir Projects Connector).

Once enabled, when you edit the project, tips in the project Properties form displays the following message for users with required role privileges.

You cannot modify some of the fields on this screen because this project was locked by OpenAir Projects Connector. [Click here to unlock.](#) (This project will no longer be linked with a MSP file and subsequent MSP updates would not be possible if it is unlocked).

For non-administrator roles, the following role setting also must be enabled: Unlock projects (locked by OpenAir Projects Connector).

2. To unlock a project, select the **Click here** link.

The project is unlocked in OpenAir.

OR

Re-run Projects Connector when a project in OpenAir is linked to a Microsoft Project file. Select the check box to Import to existing project in OpenAir. Do not select the check box to Lock OpenAir project. The project is unlocked in OpenAir.

Note: Once the project is unlocked, pull it from OpenAir using the [Pull a Project from OpenAir in to Microsoft Project](#) procedure. However, to be able to push the updated Microsoft Project file back to the same project in OpenAir, select the option to lock the project in OpenAir.

Lock a Project in OpenAir

You can lock a project in OpenAir when you push it from Microsoft Project to OpenAir or when you pull it from OpenAir in to Microsoft Project. If you lock a project in OpenAir, you can modify it in Microsoft

Project and push the updated file back to the same project in OpenAir. If you do not lock it, you cannot push it to the same project, pushing it to OpenAir creates a new project.

To lock a project:

1. **Push Microsoft Project File:** Ensure that you select the check box Lock OpenAir project. (Future edits in MS Project) when following the procedures to [Push Microsoft Project File to an Existing Project in OpenAir](#) and to [Push Microsoft Project file to a New Project in OpenAir](#).

OpenAir Import Settings

Enter the name of OpenAir Project to be created:
Altima Technologies: ERP Integration

Please select a OpenAir client:
[Select...] Refresh

Please select a OpenAir project stage:
Administrative

Map OpenAir and Microsoft Project resources

Microsoft Project Resource	OpenAir Employee
Analyst	Analyst
Bill Carr	Bill Carr
Bill Humber	Bill Humber
Brian Dates	Brian Dates
Client	Client
Consultant	Consultant

Lock OpenAir project. (Future edits in MS Project) Advanced...

Import to existing OpenAir project

Check Schedules Cancel OK

[Pull a Project from OpenAir in to Microsoft Project:](#) Ensure that you select the check box Lock this project in OpenAir after exporting to allow re-importing back into OpenAir from Microsoft Project when following the procedure to pull a project from OpenAir into Microsoft Project.

OpenAir Export Settings

Please select the OpenAir project you wish to export to a Microsoft Project file.

Please select a OpenAir project
Altima Technology : SRP deployment

Lock this project in OpenAir after exporting to allow re-importing back from MSP

Advanced... Cancel OK

Application Differences

There are fundamental differences between OpenAir and Microsoft Project. Projects Connector cannot compensate for these differences, but with a better understanding of how each program works, you can use them together to achieve your goals. Some significant differences exist in hours, task types, effort-driven scheduling, and task constraints.

Hours

Categories of hours and work fields are comparable in each software program. Although they are roughly equivalent, there are some important differences. Below is a table that presents a summary of differences. To review more detailed information on how data are handled by each software program see [Details About Hours](#).

OpenAir	Microsoft Project
Planned hours	Work hours
Worked hours	Actual work
Gap	Remaining work
Overtime work - no built-in OpenAir equivalent	Overtime work
Estimated hours	Estimated hours - No Microsoft Project equivalent
Remaining Hours	Remaining hours - No Microsoft Project equivalent
Billed hours	Billed hours - No Microsoft Project equivalent

Task Types

In Microsoft Project, there are three different task types: fixed units, fixed work, and fixed duration. According to Microsoft Project documentation, the task type determines how units, duration, and work interact as defined in the table that follows.

In a...	If you revise units...	If you revise duration...	If you revise work...
Fixed units task	Duration is recalculated	Work is recalculated	Duration is recalculated
Fixed work task	Duration is recalculated	Units are recalculated	Duration is recalculated
Fixed duration task	Work is recalculated	Work is recalculated	Units are recalculated

In OpenAir, all tasks behave like Microsoft Project fixed units tasks. If you change the units, i.e., the percentage of time a resource is assigned, OpenAir recalculates the duration. While duration cannot be directly changed in OpenAir, if you have an internal setting enabled, you can input planned hours for each user assigned to a task in addition to the percentage of time. This is similar to the adjustments that can be made to a resource's work hours in the Microsoft Project resource usage view.

Effort-Driven Scheduling

In Microsoft Project, after a resource is assigned to a task, the task is scheduled according to the formula $\text{Duration} = \text{Work} / \text{Units}$. For any task, you can choose which piece of the equation Microsoft Project

calculates by setting the task type. When you assign or remove resources from a task, Microsoft Project lengthens or shortens the duration of the task based on the number of resources that are assigned to it. However, Microsoft Project does not change the total work for the task. This is called effort-driven scheduling, and it is the default Microsoft Project uses when resources are assigned to tasks.

In OpenAir, you cannot select whether or not a task is effort-driven. OpenAir operates in one of two ways based on an internal setting: input planned hours for each user assigned to a task.

- If the setting is enabled, OpenAir's behavior is different than Microsoft Project's behavior. Planned hours must be input for each user assigned to a task.
- If the setting is not enabled, OpenAir mirrors Microsoft Project's behavior. They both change the duration of the task when resources are added or removed from the task, but neither change the planned hours or total work for the task.

Task Constraints

There are two switches that govern task constraints in OpenAir: "Enable FNLT (finish no later than) dates for tasks" and "Switch FNLT dates to end dates."

According to Microsoft Project documentation, there are eight Microsoft Project task constraints. They are described in the table that follows.

Type	Name	Description
Flexible	As Late As Possible (ALAP)	Schedules task as late as possible with the task ending before the project ends and without delaying subsequent tasks. This is the default constraint for tasks when you schedule from the project finish date. Do not enter a task start or finish date with this constraint.
Flexible	As Soon As Possible (ASAP)	Schedules task to begin as early as possible. This is the default constraint for tasks when you schedule from the project start date. Do not enter a start or finish date with this constraint.
Semi-Flexible	Start No Earlier Than (SNET)	Schedules task to start on or after a specified date. Use to ensure that a task does not start before a specified date.
Semi-Flexible	Finish No Earlier Than (FNET)	Schedules task to finish on or after a specified date. Use to ensure that a task does not finish before a certain date.
Semi-Flexible	Start No Later Than (SNLT)	Schedules task to start on or before a specified date. Use to ensure that a task does not start after a specified date.
Semi-Flexible	Finish No Later Than (FNLT)	Schedules task to finish on or before a specified date. Use to ensure that a task does not finish after a certain date.
Inflexible	Must Finish On (MFO)	Schedules task to finish on a specified date. Sets the early, scheduled, and late finish dates to the date that you type, and anchors the task in the schedule.
Inflexible	Must Start On (MSO)	Schedules task to start on a specified date. Sets the early, scheduled, and late start dates to the date that you type, and anchors the task in the schedule.

If you manually enter a start date or a finish date for a task, Microsoft Project changes the constraint type for that task to Start No Earlier Than (SNET) or Finish No Earlier Than (FNET). These semi-flexible constraint types force the task to start or end on the specified date, regardless of subsequent changes that would otherwise affect the task's place in the overall project plan.

Details About Hours

OpenAir and Microsoft Project applications both handle hours and work fields. While functionality is comparable, there are some important differences. The following describe those differences in some detail:

- [OpenAir Planned Hours VS. Microsoft Project Work Hours](#)
- [OpenAir Worked Hours VS. Microsoft Project Actual Hours](#)
- [OpenAir Gap Hours VS. Microsoft Project Remaining Work](#)
- [Microsoft Project Overtime Work](#)
- [OpenAir Estimated Hours](#)
- [OpenAir Remaining Hours](#)
- [OpenAir Billed Hours](#)

The following table highlights the areas where differences exist.

OpenAir	Microsoft Project
Planned hours	Work hours
Worked hours	Actual work
Gap	Remaining work
Overtime work - no built-in OpenAir equivalent	Overtime work
Estimated hours	Estimated hours - No Microsoft Project equivalent
Remaining Hours	Remaining hours - No Microsoft Project equivalent
Billed hours	Billed hours - No Microsoft Project equivalent

Each is described in more detail in the following paragraphs.

OpenAir Planned Hours VS. Microsoft Project Work Hours

There are differences in the way OpenAir handles Planned hours versus the way Microsoft Project handles Work hours. The way your OpenAir account is configured is also a factor since internal switches determine how OpenAir handles Planned hours. Review the following descriptions.

Microsoft Project Work Hours

In Microsoft Project, work is a dynamic field that is made up of three more granular fields: actual work, remaining work, and overtime work. A user can edit the work field, changing the amount of work needed to complete a task. When a value is entered in the work field, Microsoft Project automatically divides that work between the assigned resources based on the assignment units. If a user changes any of the fields for actual work, remaining work, or overtime work, the work field is automatically adjusted. Refer to the following examples of a project plan.

Example 1: Project plan before changes are made. No actual work hours have been entered.

Example 2: Project plan after entering 10 hours of actual work for Bill Carr. Notice that while Microsoft Project moves the hours from remaining work to actual work, the number of work hours remains the same.

Example 3: Project plan after entering 40 hours of actual work for Bill Carr, which is 15 hours more than the original number of work hours. Microsoft Project adjusts the total work for the task, and changes the finish date and duration.

OpenAir Planned Hours

Unlike work hours in Microsoft Project, OpenAir planned hours are not dynamic. They do not change automatically because another field has changed. In the previous example, if actual work exceeds work hours, Microsoft Project adjusts the work field. OpenAir does not change the plan if worked hours exceed planned hours. Planned hours in OpenAir act as budget hours for the task. The number of hours logged against the task has no effect on the number of planned hours. While OpenAir gap hours are related to planned hours, the planned hour field is not comprised of other fields as it is in Microsoft Project.

OpenAir can behave like Microsoft Project in one respect if the following internal setting is enabled: Input planned hours for each user assigned to the task. This setting determines how OpenAir distributes planned hours:

- If the setting is enabled, you can distribute planned hours among assigned resources, a level of control similar to that available in the Microsoft Project resource usage view.
- If the setting is not enabled, planned hours are automatically distributed among the assigned resources based upon the percentage of time for which the resources are assigned.

OpenAir Worked Hours VS. Microsoft Project Actual Hours

In Microsoft Project, you can enter hours in the actual work field or let them be calculated automatically when percent complete or percent work complete is entered. Microsoft Project then distributes the actual work automatically to the resources assigned to the task.

In OpenAir, worked hours are hours that users have logged against the task on a timesheet. This is a more precise figure since users have logged the hours they actually worked against the task.

Although worked hours can drive percent complete in OpenAir, and they generally do, percent complete never determines the number of hours worked since these hours come directly from user timesheets.



Note: Worked hours drive percent complete unless the following internal setting is enabled: Update percent complete as approved hours divided by planned hours.

OpenAir Gap Hours VS. Microsoft Project Remaining Work

Gap hours and remaining work hours are nearly identical in Microsoft Project and OpenAir. In Microsoft Project, remaining work equals work minus actual work. In OpenAir, gap hours are planned hours minus worked hours.

However, there is one significant difference. You cannot edit gap hours in OpenAir, but you can edit remaining work in Microsoft Project. Remember, the work field in Microsoft Project is comprised of three fields, including remaining work, and they can all be edited.

Microsoft Project Overtime Work

OpenAir does not have a field for overtime work, and Microsoft Project does. It is one of the three fields that contribute to the work field value.

In OpenAir, you can easily create a calculated field for overtime work and generate the data using OpenAir Report functionality.

OpenAir Estimated Hours

OpenAir has a field for estimated hours, and Microsoft Project does not. Estimated hours are approved hours from timesheets plus hours remaining that are entered by the user in the Timesheets module. This information is not transferred using Projects Connector.

In OpenAir, you can easily generate data for estimated hours using OpenAir Report functionality.

OpenAir Remaining Hours

OpenAir has a field for remaining hours, and Microsoft Project does not. Remaining hours are generally estimated hours minus worked hours. Although, if a user who has worked hours is removed from a task, the remaining hours might not equal estimated hours minus worked hours. This information is not transferred using Projects Connector.

In OpenAir, you can easily generate data for remaining hours using OpenAir Report functionality.

OpenAir Billed Hours

OpenAir has a field for billed hours, and Microsoft Project does not. Billed hours are hours from timebills or charges in the Invoices module and include hours from all timebills, whether they are open or invoiced. This information is not transferred using Projects Connector.

In OpenAir, you can easily generate data for billed hours using OpenAir Report functionality.

References

This section includes reference information on the following:

- [Field Mapping Reference](#) — how fields in one application map to fields in the other application
- [Resource Assignment Mapping](#) — how OpenAir maps Microsoft Project resource assignments
- [Troubleshooting](#) — how to open a support ticket and send a log file to OpenAir Customer Support
- [Frequently Asked Questions](#) — how to find answers to situations that may arise

Field Mapping Reference

The following tables help you understand how fields in one application map to fields in the other application. It presents a guide for mapping fields from Microsoft Project to OpenAir and one for mapping fields from OpenAir to Microsoft Project.

Field From Microsoft Project	To Field in OpenAir
Microsoft Project duration	OpenAir duration
Microsoft Project task ID	OpenAir task ID
Microsoft Project summary task name	OpenAir phase name
Microsoft Project task name	OpenAir task name
Microsoft Project predecessor	OpenAir predecessor
Microsoft Project resource names, % allocation	OpenAir task assignment, including % allocation units
If Microsoft Project % complete has data, Microsoft Project % complete	OpenAir % complete
If Microsoft Project has work and OpenAir internal setting "Input planned hours for each user assigned to the task" is enabled then, Microsoft Project work hours	OpenAir planned hours

Note: OpenAir Start/Finish dates are calculated from the duration by default. Optionally, there is a setting that allows Projects Connector to set OpenAir fixed start/end dates based on Microsoft Project tasks' start/finish date.

Field From OpenAir	To Field in Microsoft Project
OpenAir duration	Microsoft Project duration
OpenAir ID	Microsoft Project ID
OpenAir phase name	Microsoft Project summary task name
OpenAir task name	Microsoft Project task name
OpenAir predecessor	Microsoft Project predecessor
OpenAir resource task assignment and % allocation	Microsoft Project resource names and % allocation units
If OpenAir has % complete data, OpenAir % complete	Microsoft Project % complete

Field From OpenAir	To Field in Microsoft Project
If selected from Advanced > Settings during export from OpenAir, either all timesheet hours or approved timesheet hours (depending on user selection)	Actual work hours in Microsoft Project

Resource Assignment Mapping

OpenAir maps Microsoft Project resource assignments using the following guidelines:

- A Microsoft Project resource name maps to an OpenAir user name. You can make changes to this mapping on the OpenAir Import Settings window before you push a project to OpenAir. Refer to [Push Microsoft Project file to a New Project in OpenAir](#).
- Each task and its duration in a Microsoft Project file convert to a task and task duration in OpenAir. The tasks and planned hours, as well as other pertinent task information, display. To view, select Projects and select a project. Go to Phases/Tasks: Outline information.
- The percentage allocation for each user on a task in Microsoft Project converts to the same percentage assignment for that task in OpenAir. To view, select Projects and select a project. Go to Phases/Tasks: Outline information.
- A user's schedule is adhered to when pushing Microsoft Project tasks. Task duration is distributed according to the OpenAir user's schedule. To view a user's schedule, users with required role privileges navigate to user information. Go to Administration > Global Settings > Users and select a User ID. Click Schedule.
- If your OpenAir company settings allow assignment of only booked users, refer to [Push Microsoft Project File to a Project in OpenAir With Booked Users](#). To view or edit these settings in OpenAir, users with required role privileges navigate settings for Resources. If using the new UI, select Administration > Application Settings > Projects > Other settings. Locate the option selected for Users available for assignment to a project: Booked users, Booked users or all users if none are booked, or All users.

Frequently Asked Questions

Questions may arise as you use Projects Connector. The following topics contain frequently asked questions and their answers.

- [FAQ: Push and Pull Projects](#)
- [FAQ: Locked and Unlocked files](#)
- [FAQ: OpenAir Resources](#)
- [FAQ: Transfer of Planned Hours](#)
- [FAQ: Transfer of Worked Hours](#)
- [FAQ: Date Mismatch between Microsoft Project and OpenAir](#)
- [FAQ: Log File Location](#)

FAQ: Push and Pull Projects

The following are frequently asked questions and their answers about pushing and pulling projects to and from OpenAir.

1. **Are there any do's and don'ts about updating projects in Microsoft Project after you've pulled it? Are there things that should not be modified in the project plan?**

Answer: Yes, be careful of the following:

- Avoid deleting tasks in Microsoft Project. This is especially true for tasks that are already used in OpenAir in any transactions such as timesheets and invoices. The corresponding tasks will not delete in OpenAir, even if they are deleted in Microsoft Project, causing consistency issues.
 - Always keep both the .mdb and .mpp files together in the same directory. If you lose the .mdb file, you will have to switch to maintaining the project in OpenAir. It is the file that helps associate the project in both places.
 - If moving tasks within a project in Microsoft Project, always use drag and drop. Never use cut and paste as OpenAir interprets it as deleting one task and creating another. If the task cannot be deleted, due to transactions, a duplicate task is created and the project is out of sync.
 - Avoid using task types other than fixed units. OpenAir only supports fixed units task types because it recalculates duration based on changes to units or allocation of resources.
 - Never push a file to a different OpenAir server. If using a test environment, lock the file in OpenAir, pull it to Microsoft Project, edit it, and push it back to the same OpenAir server.
2. **I tried to push a file to OpenAir and nothing happened when I clicked on the dialogue box to create the mapping file. Why can't I do this?**

Answer: This could happen if you do not have the privilege to create files at a location where the .mpp file is. Or you may be pointing to this file somewhere on a shared drive, which would not work. Bring the file onto your local machine and push it from there. If it still doesn't work, [Creating a Support Case](#).

3. **I am trying to use Projects Connector to push a project from Microsoft Project to OpenAir. I did it before when we were using a demo account, but cannot get it to work with our real account. What should I do?**

Answer: To use Projects Connector with your real account, change the server in the account settings and enter your account information — See [Account Settings](#) for details. Remember, you must have the required role privileges in OpenAir.

4. **I created a project initially in Microsoft Project, then pushed it into OpenAir. I renamed the project in Microsoft Project and tried to push it into OpenAir, but it didn't work. Why?**

Answer: Projects Connector identifies projects by name and keeps the mapping file with the same name as the .mpp file. Renaming the file in Microsoft Project broke the integration. Try changing the name of the Microsoft Project file back to its original name and then pushing it into OpenAir. If this doesn't work, [Creating a Support Case](#).

5. **Why can't I make changes to the same project plan in both Microsoft Project and the Projects module in OpenAir?**

Answer: The system cannot reconcile changes made to the same data set in two places at the same time. You need to make changes to the Microsoft Project plan and then push it to OpenAir or make changes in OpenAir and then lock the file as you pull it from OpenAir.

6. **If I push a Microsoft Project plan to OpenAir and lock the project, will a different user be able to update the project later?**

Answer: Yes, as long as the following conditions exist:

- The user has the appropriate administrator privileges and access.
- You send that user the .mdb file with the same name as the .mpp file (after the update).
- The other user stores that .mdb file in the same directory as the .mpp file.

If both files are stored in the same directory, all authorized users should be able to launch Projects Connector, push the project to an existing project in OpenAir, and proceed with the update. Never update the same project in OpenAir from multiple versions of Microsoft Project files. This will create corruption of data.

7. **I pushed a project to OpenAir and locked it. I asked for a test account and OpenAir copied the files from my production account to that test environment. I updated the project in**

Microsoft Project, and when I pushed it back to OpenAir in my new account, some tasks and dates were changed. Why?

Answer: There are many factors that affect an account. The .mdb file gets populated with new IDs created in the new environment. It is not valid to test across multiple platforms. When using a test account, pull the project from that account, make changes, and push it back to the same account. That is the only valid way to test functionality.

8. If I pull a project plan from OpenAir into Microsoft Project, lock it in OpenAir, save over the original file in Microsoft Project, and then push it back in to OpenAir, what happens? Will any hours that have been approved/worked still map appropriately?

Answer: DO NOT DO THIS! If project-plan.mpp and project-plan.mdb match ,i.e., the names are the same, Projects Connector will not allow you to push this overwritten project into OpenAir. When you overwrite the original project-plan.mpp, tasks are no longer mapped appropriately and the result is that it is now a corrupted project plan. Submitted and approved time may be associated with the wrong task. We recommend that when you pull a project plan from OpenAir and lock it, you then save it as a new filename. Edit that file in Microsoft Project and push it back to the same project in OpenAir.

9. I pushed a Microsoft Project file to a locked project in OpenAir and got the following message. What can I do?

“Microsoft Project file does not match the original file which was used to import this project. This can happen if you overwrite the original .mpp file with a fresh copy. This file can no longer be used to update an existing project in OpenAir.”

Answer: This can happen if the mdb file and the mpp file do not match. This may also happen if the original mpp file was overwritten by a pull of an export which does not re-lock the original project in OpenAir. Finally, if you copied and pasted tasks from another project to this project, you might get this error. As of March 2010, we realize this is a limitation of the integration and may address it the future.

If you receive this error, we suggest the following:

- a. Unlock the original project in OpenAir from the OpenAir UI.
- b. Re-export the project to Microsoft Project. Be sure to lock it in the process.
- c. Make all the changes in Microsoft Project and then push it back into OpenAir.

If you are copying and pasting tasks from one mpp file to another in the future, you can prevent this problem from occurring if you do not paste into the initial phase on the project list. Create a new phase and paste into that one.

In addition, please note that if you send the mpp, mdb and log files (zipped) to OpenAir Customer Support, depending on the exact cause of the problem, Engineering may be able to fix the mpp file to be importable again. However, if the files are mismatched, the Engineering fix may cause corruption.

FAQ: Locked and Unlocked files

The following questions and answers focus on locked and unlocked files in OpenAir.

1. How can I tell whether or not a project is locked in OpenAir?

Answer: Navigate to Projects > Projects and select a Project. Click Edit project. The Edit project form displays and the Project name and Customer fields are bold and not editable. The following message displays in tips: You cannot modify some of the fields on this screen because this project was locked by Projects Connector.

2. I am trying to push a Microsoft Project file to OpenAir, but I'm getting an error message. Why?

Answer: You are trying to push a project plan into an existing project in OpenAir. The project in OpenAir is not locked, and already has phases and tasks created. You can push a project plan from Microsoft Project using Projects Connector into an existing project in OpenAir, but only if:

- the project in OpenAir is empty (i.e., it has no tasks or phases already created), OR
- you have previously locked the project in OpenAir.

Other considerations: If the project has been locked and you are getting this message, it might have been locked by a different user. Remember, the project file (.mpp) and mapping file (.mdb) need to be in the same directory. If the files are on a network, an error might be caused if you do not have necessary permissions on the network, or if network drive connectivity is limited.

3. How do I unlock a project? I locked a project when I pushed it to OpenAir, and now I want to unlock it so I can make changes to it in OpenAir.

Answer: Re-run Projects Connector and select the check box to Import to existing OpenAir project. Do not select the check box to Lock OpenAir project. Because the project in OpenAir is linked to a Microsoft Project file, the project is unlocked and you can edit it in OpenAir.

OR

[Creating a Support Case](#) and request that the following switch be enabled: Enable unlocking of projects (locked by OpenAir Projects Connector). For more information on unlocking a project, refer to [Unlock a Project in OpenAir](#).

4. I locked a project in OpenAir when I pulled it into Microsoft Project. How can I unlock the project now?

Answer: Since you have pulled the project into Microsoft Project, you can push it to OpenAir as unlocked. Refer to the answers above or the procedure to [To unlock a project in OpenAir](#).

5. I pushed a project into OpenAir from Microsoft Project and did not lock the project. Now, I want to modify the project plan in Microsoft Project and update the project in OpenAir using the modified plan. Is there any way I can do that now?

Answer: You can pull the project from OpenAir to Microsoft Project and select the check box to Lock this project in OpenAir after exporting to allow re-importing back into OpenAir from Microsoft Project. After you make changes to this Microsoft Project plan, push it back to OpenAir.

6. I want to push a project plan from Microsoft Project into an existing project in OpenAir. Can I do this?

Answer: Yes, but only if:

- the project in OpenAir is empty, i.e., it has no tasks or phases already created OR
- you have previously locked the project in OpenAir.

7. I locked a project in OpenAir and no longer have the .mpp and .mdb files needed to re-run the Connector to unlock it. Is there any other way to unlock a project in this situation?

Answer: There is a feature that allows users to unlock projects in OpenAir from the OpenAir UI. [Creating a Support Case](#) and request that the following switch be enabled: Enable unlocking of projects (locked by OpenAir Projects Connector). For more information on unlocking a project, refer to [Unlock a Project in OpenAir](#).

8. I locked a project in OpenAir and now I have lost the .mpp or .mdb files needed to do updates. Can I pull the project from OpenAir and lock it, and then create a new .mpp/.mdb pair which I can use to make my changes in Microsoft Project?

Answer: No, you will NOT be able to pull the locked project from OpenAir to Microsoft Project (and lock it) to create a new .mpp/.mdb file pair from which to update the project in OpenAir. You will first have to unlock the project in OpenAir from the user interface. Refer to [Unlock a Project in OpenAir](#) for more information. Make sure you give the file a different name when you pull it and lock it so you can push it from Microsoft Project. Make changes to the new Microsoft Project file and then push it OpenAir.

9. I have created a project in OpenAir. It has tasks and phases, and it is not locked. Can I add new tasks by importing them from Microsoft Project?

Answer: If the project already exists in OpenAir but is not locked, you can try the following workaround to add new tasks from a project in Microsoft Project:

- a. Push the Microsoft Project project plan into OpenAir as a new project.
- b. In OpenAir, navigate to Projects > Projects and select the new project. Click Outline view. Select Create > Phase. Move the tasks that you want to add to the original project in OpenAir into this phase.
- c. Click on the phase. The Edit phase form displays. Scroll down and click on move this phase to another project. The Move phase [phase name] form displays. Select the original project you want to move the phase and its tasks to and click Save.

10. I have a project that was locked in OpenAir, and then I unlocked it using Projects Connector. Can I use Projects Connector again to re-lock the project?

Answer: Yes, but it depends on whether the project is empty.

- If the project is empty, i.e., has no phases or tasks, you can push the Microsoft Project file to the project in OpenAir and select the check box to lock it.
- If the project is not empty, you can pull the project from OpenAir, select the check box to lock it in OpenAir.

FAQ: OpenAir Resources

The following question addresses selecting OpenAir Resources for a project in Microsoft Project.

I pulled resources from OpenAir and want to assign them to a project in Microsoft Project that I am pushing to OpenAir. The list of OpenAir users that displays on the OpenAir Import Settings window does not include all users, only those I manage. How can I get other resources to display so that I can assign them to the project?

Answer: The OpenAir primary filter set for your account controls the names that display in this drop-down list. The user access portion of your primary filter set can be revised to include all users you want to be able to assign to projects. Your account administrator can make this modification. Once the filter set is changed, click the Refresh button on the OpenAir Import Settings window to re-populate the user list. Since Projects Connector caches its lists, refreshing the list displays current account options.

FAQ: Transfer of Planned Hours

The following question addresses the transfer of planned hours.

Does the Projects Connector transfer work hours from Microsoft Project to OpenAir? I pushed a project from Microsoft Project to OpenAir that has work hours entered in Microsoft Project but I don't know where they went.

Answer: As of v2.21 of the Projects Connector, you can [Creating a Support Case](#) and request that the following switch be enabled: Input planned hours for each user assigned to a task. The Projects Connector then imports work hours from Microsoft Project into OpenAir as planned hours assigned to the user. Since Microsoft Project calculates the total task work as the sum of the work that assigned resources are to perform on a task, it is similar enough to how OpenAir calculates the task planned hours as the sum of planned hours assigned to users. Refer to the following examples.

Example 1: Bill Carr has 25 Work hours in Microsoft Project.

Task Name	Work
[-] Sample Schedule	863.8 hrs
[-] Spec. and Design Phase	863.8 hrs
[-] Project Management	149 hrs
Bill Carr	25 hrs

Example 2: Bill Carr has 25 Planned hours in OpenAir.

Assignments

Assigned to	Percent of user's time	Users planned hours
<input style="width: 90%;" type="text" value="Carr, Bill"/>	<input style="width: 80%;" type="text" value="6"/>	<input style="width: 80%;" type="text" value="25"/>

FAQ: Transfer of Worked Hours

The following are frequently asked questions about the transfer of worked hours.

- 1. Does the Projects Connector transfer worked hours from Microsoft Project to OpenAir? I imported a project from Microsoft Project with work hours into OpenAir. In OpenAir, the project plan shows some tasks are XX% complete, but I don't see any worked hours.**

Answer: Work hours in Microsoft Project are not the same as OpenAir worked hours. Microsoft Project Work hours are most similar to planned hours in OpenAir. Refer to [FAQ: Transfer of Planned Hours](#) for more information. If you have entered a percentage of completion on a particular task in Microsoft Project, the Projects Connector brings that figure to OpenAir.

- 2. Does Projects Connector transfer worked hours from OpenAir to Microsoft Project?**

Answer: Beginning with version 2.17, the Projects Connector exports worked hours from OpenAir timesheets to the actual work field in Microsoft Project. Use Advanced > Settings to select either all timesheet hours or approved timesheet hours.

Warning: OpenAir timesheet hours do not affect durations of project tasks while in Microsoft Project actual work hours will cause durations to shift. This is because actual work, along with remaining work and overtime work make up the less granular value of work in Microsoft Project.

Depending on the task type in Microsoft Project, work can affect duration and possibly units. Refer to the following table.

In a...	If you revise units...	If you revise duration...	If you revise work...
Fixed units task	Duration is recalculated	Work is recalculated	Duration is recalculated
Fixed work task	Duration is recalculated	Units are recalculated	Duration is recalculated
Fixed duration task	Work is recalculated	Work is recalculated	Units are recalculated

There could also be a situation where in OpenAir, users log time against a task they are not assigned to. When the project is pulled into Microsoft Project, those hours are not exported since they are not against an assigned task and a warning is issued.

Finally, OpenAir percent complete information is also not pulled since it changes actual work in Microsoft Project, and subsequently causes durations to change.

FAQ: Date Mismatch between Microsoft Project and OpenAir

The following questions and answers focus on date mismatches between Microsoft Project and OpenAir.

1. **I pushed a project from Microsoft Project to OpenAir and some of the tasks display 0 hours in OpenAir. Those same tasks have duration/planned hours in Microsoft Project. Why don't the hours transfer to the project in OpenAir?**

Answer: This happens when your OpenAir account has the setting enabled for "user level planned hours" and you have not assigned users to the project tasks in Microsoft Project. In OpenAir, only tasks that have users assigned can have duration/planned hours that are greater than 0. First, you need to assign users to a task with duration/planned hours. Then, when you push the project to OpenAir, the Microsoft Project hours transfer with the tasks.

2. **I pushed a Microsoft Project file into OpenAir or pulled a project from OpenAir into Microsoft Project, but the task dates shown in the outline view in OpenAir do not match the task dates in the Microsoft Project project plan.**

Answer: Projects Connector takes into account the assigned users schedules in OpenAir. If the users' schedules in OpenAir are different from the users schedules in Microsoft Project, the distribution of hours, the duration, and dates of the tasks will vary accordingly. Please confirm that users schedules are the same in OpenAir and Microsoft Project.

To make the schedules equivalent, maintain resource calendars in OpenAir and use Pull OpenAir resources. If your account only allows booked users to be available for assignment, a message displays. In this case, Projects Connector automatically pulls the schedules of booked resources from OpenAir.

Since mismatches between Microsoft Project calendars and OpenAir schedules can cause inconsistencies between the Microsoft Project and project plans in OpenAir, you should check for conflicts. Click the Check Schedules button before you push a Microsoft Project project plan to OpenAir.

If conflicts are found, Projects Connector displays a list. Refer to the following example.

FAQ: Log File Location

The following question addresses the location of the log file. If you need help from OpenAir Customer Support, [Creating a Support Case](#). You may be asked to locate the log file, zip it, and attach it to an email message.


Where can I find the log file for the Projects Connector?

Answer: The log file is named OpenAirProject.log. It is located in:

- C:\Users\<<Username>\AppData\Roaming\OpenAir\Project64 (64 bit version)
- OR
- C:\Users\<<Username>\AppData\Roaming\OpenAir\Project (32 bit version)

You can also access the log file from within Microsoft Project.

To view the log file:

1. Open Microsoft Project.
2. Go to Add-ins > OpenAir or click  OpenAir in the Custom Toolbars and click **About OpenAir Projects Connector**. The **About OpenAir Projects Connector** window displays.



3. Click **View Log File**.

Troubleshooting

The first step in troubleshooting is to ensure that you have installed the latest version of the Projects Connector so that you have the most recent enhancements, fixes, and features. You are prompted to download a new version when it becomes available. We recommend that you do so. Refer to [Installing a New Version](#) for more information.

If you are experiencing difficulties with Projects Connector or would like to enable an optional feature for your OpenAir account, create a support case. Our Customer Support staff and engineers will work with you to find a solution to your problem. See [Creating a Support Case](#).

Before you create a support case, review [Frequently Asked Questions](#).



Important: Make sure you attach the Projects Connector log file (compressed as a ZIP file) when creating a support case.

To view the log in Microsoft Projects, click the OpenAir toolbar and select About OpenAir Projects Connector, then click **View Log file**.

Creating a Support Case

If you are experiencing difficulties with OpenAir or would like to enable an optional feature, go to SuiteAnswers through the Support page in OpenAir and create a support case.

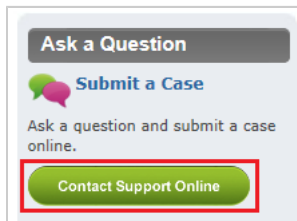
Our support staff and engineers will work with you to find a solution to your problem.

Important: Be sure to review the [Support Usage Best Practice Guidelines](#), [Case Severity Definitions](#) and [Case Resolution Overview](#) before you submit a support case or call the Support team.

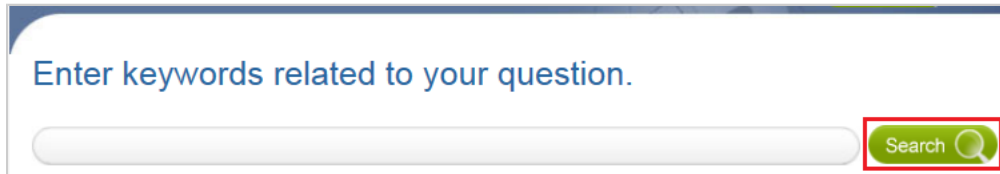
As a part of the support case creation process you will be presented with existing answers that may solve your problem. Take a moment to view the available answers before proceeding to create a support case.

To create a support case:

1. Sign in to your company's OpenAir account and select **Support** from the user menu.
2. Click **Go to SuiteAnswers**.
3. On the SuiteAnswers website, click **Contact Support Online**.

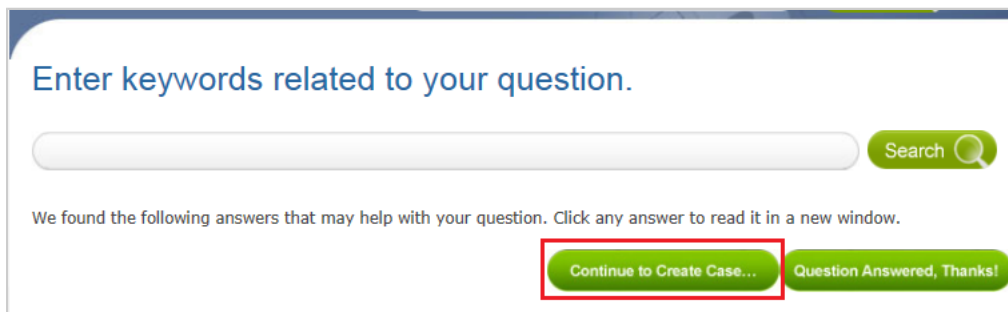


4. Enter keywords corresponding to the question or problem you want to resolve and click **Search**.



Note: If you do not have a question but need a feature enabled, for example, click **Search**.

5. Oftentimes, the answer to your question will be displayed. If you still want to create a support case, click **Continue to Create Case**.



6. Fill out the **Create Case** form and then click **Submit**. You will receive an email confirmation with your support case reference (OpenAir Customer Care #).

Important: Review the **Case severity** definitions and always use the appropriate case severity when submitting a case. See the help topic [Case Severity Definitions](#).

Using the appropriate case severity helps OpenAir Customer Support prioritize between cases. Otherwise, OpenAir Customer Support need to evaluate the true urgency of each case, which slows down the response time to all cases.

Create Case

What would you like to do? *

Case Severity *

You can expand this section to review the description of each Case Severity. If you need to change the Case Severity, please provide specific details regarding the nature of the severity. +

Subject *

Question *

Product Area *

Feature

Attach Document

Email *

Phone (Optional)

Note: An asterisk * indicates a required field.