

SuiteProjects Pro

Project Connector



4.6

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Project Connector Overview

This guide documents the SuiteProjects Pro Project Connector add-on service and SuiteProjects Pro add-in for Microsoft Project.

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

- The **project plan** represents 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 SuiteProjects Pro or in Microsoft Project, and basic project plan information can be exchanged between the two applications using Project Connector. However, you must control or modify the project plan in either SuiteProjects Pro or Microsoft Project. You cannot control or modify it in both applications. You must choose one or the other as your primary application. Changing elements of the project plan in both applications could lead to irreconcilable discrepancies, and in some cases, 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 this information, you can monitor the progress of the project, calculate what percentage of a task or phase is complete, and determine whether the project is on schedule and within budget. This information is drawn from tools such as the Timesheets application in SuiteProjects Pro, where users enter time worked on each task and project, and the Invoices application, where billable hours for each project are calculated.

Project Connector lets you:

- **Push to SuiteProjects Pro** — Export a project plan from Microsoft Project to SuiteProjects Pro. You can lock the project plan for editing in SuiteProjects Pro after the initial export, if you want to modify the project plan in Microsoft Project going forward and export the changes to update the project in SuiteProjects Pro. Alternatively, leave the project plan unlocked if you want to maintain it in SuiteProjects Pro after the initial export.
- **Pull from SuiteProjects Pro** — Import a project plan from SuiteProjects Pro into Microsoft Project. You can import company and employee schedules along with your project plan information. You can also import planned hours for resources assigned to task, if you use this functionality in SuiteProjects Pro, as work hours in Microsoft Project. You can lock the project plan for editing in SuiteProjects Pro after the initial import, if you want to modify the project plan in Microsoft Project going forward and export the changes to update the project in SuiteProjects Pro. Alternatively, leave the project plan unlocked if you want to with the Microsoft Project project file without it being linked to your project in SuiteProjects Pro.
- **Pull SuiteProjects Pro resources** — Import resource information from SuiteProjects Pro into Microsoft Project. You can import company and employee schedules along with your project plan information. You can then assign the resources imported from SuiteProjects Pro to tasks in your Microsoft Project project plan. Project Connector checks work schedules and verifies that there are no work schedule differences between the two applications when you export a project plan with assigned resources to SuiteProjects Pro.
- **Map Microsoft Project fields to SuiteProjects Pro fields for tasks and phases** — You can map standard and custom fields for tasks to exchange task and phase or summary task information between the two applications when exporting project plan information from Microsoft Project to SuiteProjects Pro or importing it from SuiteProjects Pro into Microsoft Project.
- **Check work schedule conflicts** — Check for resource schedule conflicts between Microsoft Project and SuiteProjects Pro when you export projects from Microsoft Project to SuiteProjects Pro. Discrepancies are itemized and displayed so that you can synchronize your project plans .
- **Update a project in SuiteProjects Pro with changes made in Microsoft Project** — Export changes to your project plan made in Microsoft Project to update a linked (and locked) project in SuiteProjects Pro. Only the project plan and task information is locked for editing in SuiteProjects Pro. Information


about hours worked, approved, and billed for this project is still tracked in SuiteProjects Pro. Refer to [Editing a Project in Microsoft Project](#).

- **Export task dependencies** — Export predecessor information, including the type of predecessor relationship and lag times from your Microsoft Project to SuiteProjects Pro. SuiteProjects Pro supports Microsoft Project predecessors – you can create and edit predecessors in SuiteProjects Pro Task grid.
- **Track time** — Use SuiteProjects Pro to track time against tasks in your project plan. The Timesheets application is typically used by employees to record time worked on each task and project, and by project managers and managers to approve the time submitted by employees. You can import timesheet hours from SuiteProjects Pro into Microsoft Project as actual work hours.

Application Differences

There are fundamental differences between SuiteProjects Pro and Microsoft Project in the way each application handles hours and tasks. The following differences are the most significant:

- **Task type** — Use the fixed units task type in Microsoft Project to ensure compatibility with SuiteProjects Pro. Although Microsoft Project offers other task types, SuiteProjects Pro treats all tasks as fixed units. For example, if you change the percentage of time that a resource is assigned to a task in SuiteProjects Pro, 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 enter planned hours for each resource assigned to a task in SuiteProjects Pro, when you export a project plan from Microsoft Project to SuiteProjects Pro, the task duration is exported as planned hours.
- **Work hours from tasks to planned hours** — If you do not enter planned hours for each resource assigned to a task in SuiteProjects Pro, when you export a project plan from Microsoft Project to SuiteProjects Pro, task work hours are exported as planned hours in SuiteProjects Pro.

 **Note:** To review planned hours for a project in SuiteProjects Pro, go to Projects > Projects > [Select a project], and use one of the options available to review planned hours.

For more information, see [Application Differences](#).

Project Plan Control

Choose to control and maintain the primary project plan in either SuiteProjects Pro or Microsoft Project. Changing elements of the project plan in both applications could lead to irreconcilable discrepancies, and in some cases, duplicated transactional data such as timesheet hours and billable hours. In most cases, such duplicate entries are not possible because project plans can be locked for editing in SuiteProjects Pro and billable hours cannot be exported from Microsoft Project to SuiteProjects Pro. 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 application in SuiteProjects Pro and Microsoft Project using Project Connector.


Document Contents

This guide includes the following sections:

- **Overview** — This section includes a general description, steps for getting started, guidelines to consider when you start using Project Connector, a description of the SuiteProjects Pro add-in menu available in the Add-ins ribbon in Microsoft Project after you install Project Connector, and guidelines for working with project plans in Microsoft Project.
- **Installation** — This section includes steps for installing and uninstalling Project Connector, or updating Project Connector to a new version.
- **Using Project Connector** — This section includes steps for connecting Microsoft Project to your company's SuiteProjects Pro account, importing project plan information from SuiteProjects Pro into Microsoft Project, exporting project plan information from Microsoft Project to SuiteProjects Pro, importing resource information from SuiteProjects Pro into Microsoft Project, mapping task fields in both applications and locking and unlocking projects in SuiteProjects Pro.
- **References** — This section includes an FAQ, information about resource assignment mapping, as well as troubleshooting tips and instructions.

Definitions

- **Pull from SuiteProjects Pro** — refers to a project plan or data imported from SuiteProjects Pro to Microsoft Project.
- **Push to SuiteProjects Pro** — refers to a project plan or data being exported from Microsoft Project to SuiteProjects Pro.
- **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. Your company's SuiteProjects Pro account may use a different term in place of the word "project".
- **Tasks** — refers to the jobs or work packages and activities that make up a project. Your company's SuiteProjects Pro account may use a different term in place of the word "task".

 **Note:** This document aims to describe the functionality of Project Connector and the SuiteProjects Pro add-in for Microsoft Project only. For information about using Microsoft Project, refer to the documentation provided by Microsoft.

Getting Started

If your company has a SuiteProjects Pro account and you have installed Microsoft Project, you can download Project Connector and begin using the two applications together to plan and manage projects. Use the following steps to get started.

Step 1: Download and install Project Connector

Sign in to your SuiteProjects Pro account. Go to Administration > Global Settings > Integration: Add-on services. Locate SuiteProjects Pro Project Connector and download it. For information about installing Project Connector, see [Installing Project Connector](#).

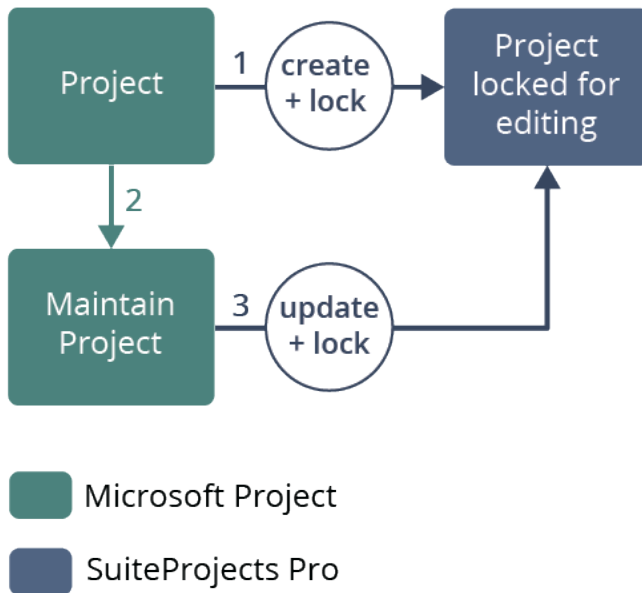
Step 2: Create a project plan

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

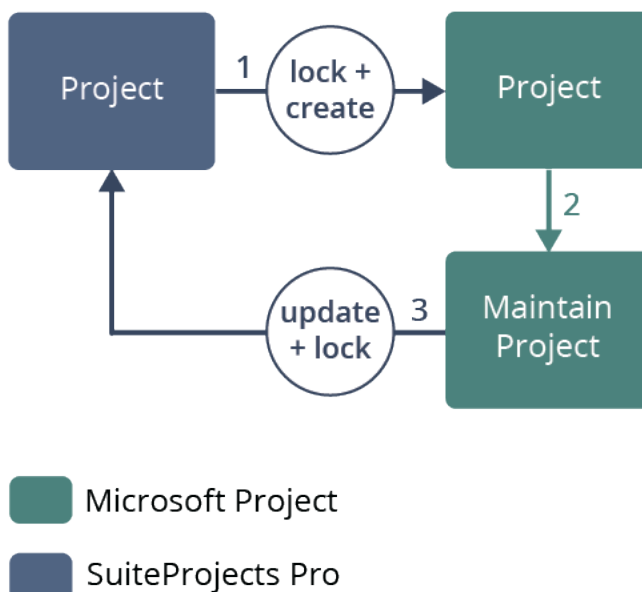
Step 3: Track progress

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

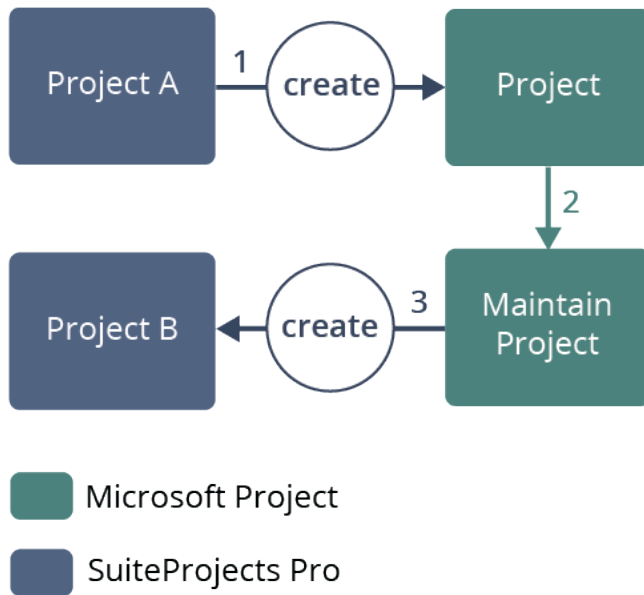
- Create a project plan in Microsoft Project and export it to SuiteProjects Pro. Lock the project plan for editing in SuiteProjects Pro after the initial export, modify the project plan in Microsoft Project going forward and export the changes to update the project in SuiteProjects Pro.



- Create a project in SuiteProjects Pro and import it into Microsoft Project. Lock the project plan for editing in SuiteProjects Pro after the initial import, modify the project plan in Microsoft Project going forward and export the changes to update the project in SuiteProjects Pro.




- Create a project in SuiteProjects Pro and export it into Microsoft Project to use as a base for a new project plan. Do not lock the project plan for editing in SuiteProjects Pro. Modify the project plan in Microsoft Project and export it to SuiteProjects Pro as a new project.



You can exchange information between the two applications and use SuiteProjects Pro resources and timekeeping capabilities. Use the following information to help you decide whether you want to lock a project in SuiteProjects Pro.

Action	Enables you to...
Export from Microsoft Project to SuiteProjects Pro and lock project in SuiteProjects Pro	View project information in SuiteProjects Pro, but not to edit it. Hours worked, approved, and billed for the project are recorded in SuiteProjects Pro as usual, but you must make project plan changes to the name, planned hours, tasks, and assignments in Microsoft Project first and then export the updated project plan to SuiteProjects Pro. Locking the project ensures that you can continue to export the project plan from Microsoft Project to SuiteProjects Pro.
Export project plan from Microsoft Project to SuiteProjects Pro and do not lock project in SuiteProjects Pro	Edit project information in SuiteProjects Pro. Hours worked, approved, and billed for that project are recorded in SuiteProjects Pro as usual, and you can make project plan changes to the project name, planned hours, tasks, and assignments in SuiteProjects Pro. You can import the project plan to Microsoft Project as a new project file to review progress.
<div style="border: 1px solid #0070C0; padding: 5px;"> <p>Note: If you export a project plan to SuiteProjects Pro but do not lock the project plan for editing in SuiteProjects Pro, you cannot use the Microsoft Project project file to make changes to the project plan in SuiteProjects Pro subsequently.</p> </div>	
Export project plan from Microsoft Project to an empty project in SuiteProjects Pro	Export an existing Microsoft Project project file to an empty and unlocked project in SuiteProjects Pro. An empty project is a project that has no tasks, phases or milestones associated with it.
Import project plan from SuiteProjects Pro into	Edit project information in a project plan newly imported into Microsoft Project, and because the project plan is locked for editing in SuiteProjects Pro, export changes back to the original project in SuiteProjects Pro. You can view project information in SuiteProjects Pro, but not edit it (unless you unlock the project).

Action	Enables you to...
Microsoft Project and lock project in SuiteProjects Pro	 Note: You can import any project plan from SuiteProjects Pro into Microsoft Project, but only unlocked projects in SuiteProjects Pro can be locked and linked to the newly created Microsoft Project project file.

Step 4: Exchange project plan information

Connect Microsoft Project to your company's SuiteProjects Pro account, then use the SuiteProjects Pro add-in to import resource information, and export or import a project. Refer to the following topics:

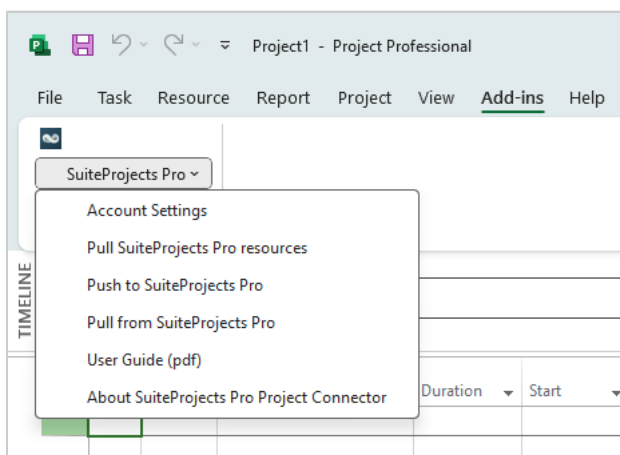
- [Connecting Microsoft Project with Your SuiteProjects Pro Account](#)
- [Importing Resource Information from SuiteProjects Pro into Microsoft Project](#)
- [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#)
- [Importing a Project Plan from SuiteProjects Pro into Microsoft Project](#)
- [Advanced Export and Import Settings](#)
 - [Task Priority Settings](#)
 - [Field Mapping](#)
 - [Other Import Settings](#)
- [Unlocking a Project in SuiteProjects Pro](#)
- [Locking a Project in SuiteProjects Pro](#)

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

SuiteProjects Pro Add-In Menu

After you install Project Connector, the SuiteProjects Pro menu is added to the Add-ins ribbon in Microsoft Project.

Click the SuiteProjects Pro menu to show the list of tasks you can perform using Project Connector.



Each option opens a window to set up the task.

- **Account Settings** — Use this option to connect Microsoft Project to your SuiteProjects Pro account. After you enter your account details, you have access to your SuiteProjects Pro project information and resource information. See [Connecting Microsoft Project with Your SuiteProjects Pro Account](#).
- **Pull SuiteProjects Pro resources** — Use this option to import or copy resource information from SuiteProjects Pro into Microsoft Project. You can then use these resources as you work on your project plan in Microsoft Project and map them to SuiteProjects Pro resources when you export your project plan to SuiteProjects Pro. See [Importing Resource Information from SuiteProjects Pro into Microsoft Project](#).
- **Push to SuiteProjects Pro** — Use this option to export a project plan from Microsoft Project to the Projects application in SuiteProjects Pro. Map resources in Microsoft Project resources to resources in SuiteProjects Pro, change priority level settings, and map Microsoft Project fields to SuiteProjects Pro fields for tasks. Decide whether to lock the project plan information for editing in SuiteProjects Pro and make all future changes to the project plan in Microsoft Project. Choose whether you are importing the project plan to an existing project in SuiteProjects Pro. See [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#).
- **Pull from SuiteProjects Pro** — Use this option to import a project plan from SuiteProjects Pro into Microsoft Project. Remember that a new project file is created in Microsoft Project even there is already a project file linked to the project you are importing. You can change priority level settings, map Microsoft Project fields to SuiteProjects Pro fields for tasks and choose whether to export actual work hours, although you should do this with caution. You should lock the project plan for editing in SuiteProjects Pro, so that you can make changes in Microsoft Project export these changes to update in SuiteProjects Pro. You should also export import work schedule information from SuiteProjects Pro to ensure an accurate timeline in Microsoft Project. See [Importing a Project Plan from SuiteProjects Pro into Microsoft Project](#).
- **User Guide (pdf)** — Opens a browser with the Project Connector documentation in PDF format.
- **About SuiteProjects Pro Project Connector** — View the SuiteProjects Pro Project Connector version and other information. You can use this menu item 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

Review the following guidelines for editing a project in Microsoft Project and exchanging the information with SuiteProjects Pro.

- **Server use** — Always use the same SuiteProjects Pro account and account type after editing a project. While you may have a sandbox account and a production account, export or import the SuiteProjects Pro project to or from the same account after making changes to the project plan. Never make changes to a project plan and export and import this project plan across multiple SuiteProjects Pro accounts of the same or different type because each account 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 SuiteProjects Pro uses to identify a task can become corrupted.
- **Copy and paste** — A known limitation of Project Connector results in a potential error message in SuiteProjects Pro when you copy and paste tasks from another project. If you copy and paste tasks from one project to another, you should not paste into the initial phase on the project list. Create a new phase and paste into that one. See [FAQ: Project Export and Import](#).
- **Fixed units task type** — Remember that SuiteProjects Pro treats all task types as fixed units task types. So, to maintain project compatibility, you should use only the fixed units task type. For more information, see [Application Differences](#).

- **Deleting a task** — Ensure that a task does not have SuiteProjects Pro transactions associated with it before you delete it in Microsoft Project. If SuiteProjects Pro 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 project file, it cannot be removed from SuiteProjects Pro due to its association with invoicing, billing, or timesheets.
- **No overwrite** — Create a new project file when you import a project plan from SuiteProjects Pro into Microsoft Project. Do not overwrite an existing project file. When the file in SuiteProjects Pro is locked, the new project file is automatically associated with the project it was imported from in SuiteProjects Pro. Make changes in Microsoft Project and export it back to the same project in SuiteProjects Pro.

Installation

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

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

System Requirements

Project Connector 4.4 or later version requires:

- Microsoft Windows 10 or 11
- Microsoft Project 2016 (32/64 bit) or Microsoft Project 2019 (32/64 bit)

Installing Project Connector

To exchange project information between the Projects application and Microsoft Project, install Microsoft Project and then install the Project Connector. The SuiteProjects Pro menu is added to the Add-ins ribbon in Microsoft Project.

To download and install Project Connector:

1. Sign in to your SuiteProjects Pro account. Go to Administration > Global Settings > Account > Integration: Add-on services. Locate Project Connector.
2. Click the **Download** link.
3. Click **Save File** and specify a location.
When the download is complete, the download complete message appears.
4. Locate **ProjectConnector.exe** and double-click it.
A security warning may appear. Accept the program.
The Setup – SuiteProjects Pro Project Connector wizard appears.
5. Click **Next**.
6. In the License Agreement step, choose **I accept the agreement** and click **Next**.
7. In the Select Destination Location step, accept the location or change it, and click **Next**.
8. In the Ready to Install step, click **Install**.
The wizard shows the installation progress. When the installation completes, the Information window step appears, showing information about the version of Project Connector you installed (README.TXT file content).
9. Read the document and click **Next**.
The Completing the SuiteProjects Pro Project Connector Setup Wizard step appears.
10. Click **Finish**.
11. Exit and launch Microsoft Project.
The Microsoft Project Add-ins ribbon shows the SuiteProjects Pro menu.

Installing a New Version

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



Important: OpenAir Projects Connector became SuiteProjects Pro Project Connector with version 4.6.0, released on February 19, 2025, following the rebranding of NetSuite OpenAir to NetSuite SuiteProjects Pro. If you are updating Project Connector from version 4.5.1 or earlier, the latest version changes the default location of the installation folder as well as some of the application file locations and names.

After you update Project Connector from version 4.5.1 or earlier to the latest version and you verify that the latest version works as expected, you should delete any remaining files from the following locations:

- OpenAir Projects Connector Program files (typically, C:\Program Files (x86)\OpenAir\Project\ unless you chose a different location during installation).
- OpenAir Projects Connector user application data files (C:\Users\\AppData\Roaming\OpenAir\Project\ and C:\Users\\AppData\Roaming\OpenAir\Project64\, where <username> is your Windows user name).

To install a new version:

1. In Microsoft Project, go to the Add-ins ribbon.
2. Select Account Settings under the SuiteProjects Pro add-in menu and connect to your SuiteProjects Pro account. For more information, see [Connecting Microsoft Project with Your SuiteProjects Pro Account](#).
3. Select any of the Pull SuiteProjects Pro resources, Pull from SuiteProjects Pro or Push to SuiteProjects Pro actions under the SuiteProjects Pro add-in menu.

If you are not using the latest version of Project Connector, a window appears asking you to download the latest version.

4. Click **Yes**.
The setup wizard appears.
5. Click **Next**.
6. A prompt to exit Microsoft Project may appear. If so, exit Microsoft Project then click **OK** to continue.
7. Follow the installation steps. For more information, see [Installing Project Connector](#).

Uninstalling Project Connector

When a new version of Project Connector becomes available, you can install the new version without first uninstalling the version you were previously using. See [Installing a New Version](#).

However, you may want to uninstall Project Connector if you are no longer using it.

Note: OpenAir Projects Connector became SuiteProjects Pro Project Connector with version 4.6.0, released on February 19, 2025, following the rebranding of NetSuite OpenAir to NetSuite SuiteProjects Pro. If Project Connector version 4.5.1 or earlier is installed on your computer, the app name and location paths should read OpenAir instead of SuiteProjectsPro in the following steps.

The following steps are given for Windows 11.

To uninstall Project Connector:

1. On your computer, go to the Windows Start menu > Settings > Apps > Installed Apps.
A list of programs installed on your computer appears.
2. Find SuiteProjects Pro Project Connector in the list.
3. Select **More** and **Uninstall**.
A confirmation dialog appears.
4. Click **Uninstall**.
The SuiteProjects Pro Project Connector Uninstall dialog appears.
5. Click **Yes**.
The SuiteProjects Pro add-in is removed from Microsoft Project. A confirmation dialog appears.
6. Click **OK**.
7. Uninstalling SuiteProjects Pro Project Connector may not remove all related files.
 - To remove project data mapping files, go to the location for your project (MPP) files and delete the associated MDB files manually.
 - To check and remove any remaining program files, go to the program files location (typically, C:\Program Files (x86)\SuiteProjectsPro\Project\ unless you chose a different location during installation) and delete the folder manually.
 - To check and remove any related user application data files, go to C:\Users\\AppData\Roaming\SuiteProjectsPro\, where <username> is your Windows user name, and delete the Project and Project64 folders manually.

Using Project Connector

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

- [Connecting Microsoft Project with Your SuiteProjects Pro Account](#)
- [Importing Resource Information from SuiteProjects Pro into Microsoft Project](#)
- [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#)
- [Importing a Project Plan from SuiteProjects Pro into Microsoft Project](#)
- [Advanced Export and Import Settings](#)
 - [Task Priority Settings](#)
 - [Field Mapping](#)
 - [Other Import Settings](#)
- [Unlocking a Project in SuiteProjects Pro](#)
- [Locking a Project in SuiteProjects Pro](#)



Important: When editing your project sequence in Microsoft Project, remember the following guidelines:

- Always drag to move tasks from one location to another. Never cut and paste.
- Never delete a task if this task has transactions associated with it in SuiteProjects Pro.
- Always import and export a project from Microsoft Project to the same SuiteProjects Pro account in the same environment. Do not import a project from your SuiteProjects Pro production account into Microsoft Project then export it to your sandbox account.

Connecting Microsoft Project with Your SuiteProjects Pro Account

Before you can exchange information between Microsoft Project and SuiteProjects Pro, you need to connect Microsoft Project with your SuiteProjects Pro account.

To connect Microsoft Project with your SuiteProjects Pro account:

1. In Microsoft Project, go to Add-ins and select **Account Settings** under the SuiteProjects Pro add-in menu.
The **Please enter your SuiteProjects Pro account information** window appears.
2. Enter your SuiteProjects Pro **Company ID**, **User ID**, and **Password**.
Check the **Remember password** box to store your SuiteProjects Pro credentials on this computer.
3. **Account URL** — Enter the URL for your SuiteProjects Pro account. For more information about your account URL, see the help topic [Your Account URLs](#).

Note: Usage of the generic domain www.openair.com or www.netsuitesuiteprojectspro.com for integrations and add-on services is no longer supported.

4. Click **OK**.

After you connect Microsoft Project with your SuiteProjects Pro account, the connection remains active while Microsoft Project is open and you can perform multiple tasks. If you close Microsoft Project and reopen it, you need to enter your password again unless you checked the **Remember password** box.

Note: By clicking the **OK** button, you understand and agree that the use of Oracle's application is subject to the [Oracle.com Terms of Use](#). Additional details regarding Oracle's collection and use of your personal information, including information about access, retention, rectification, deletion, security, cross-border transfers and other topics, is available in the [Oracle Privacy Policy](#).

Importing Resource Information from SuiteProjects Pro into Microsoft Project

After you connect Microsoft Project with your SuiteProjects Pro account, you can import SuiteProjects Pro resource information, including company and resources schedules into Microsoft Project. This lets you assign SuiteProjects Pro resources to tasks in your project plans in Microsoft Project.

For more information about connecting Microsoft Project with your SuiteProjects Pro account, see [Connecting Microsoft Project with Your SuiteProjects Pro Account](#).

Depending on your company's SuiteProjects Pro account configuration, some restriction may apply to the resources that you can assign to tasks in a project. You may be able to assign tasks to:

- Any resources that you have access to in SuiteProjects Pro. In this case, you can import resource information from SuiteProjects Pro into Microsoft Project separately from importing or exporting project information. See [Importing Resource Information from SuiteProjects Pro into Microsoft Project When All Resources Are Always Available for Task Assignment](#).
- Resources booked to the project only. In this and the following case, you can only import resource information from SuiteProjects Pro into Microsoft Project when exporting a project plan to an existing project in SuiteProjects Pro or importing a project plan from SuiteProjects Pro. See [Importing Resource Information from SuiteProjects Pro into Microsoft Project When Only Resources Booked to the Project Are Available for Task Assignment](#) and
- Resources booked to the project, or if none are booked to the project, any resources that you have access to in SuiteProjects Pro.

Importing Resource Information from SuiteProjects Pro into Microsoft Project When All Resources Are Always Available for Task Assignment

Use the following steps to import resource information from SuiteProjects Pro into Microsoft Project only if all resources that you have access to are always available for task assignments.

Otherwise, if task assignments are restricted to resources booked to the project, or to resources booked to the project or all resources if none are booked, you can only import resources when you export a project plan from Microsoft Project to SuiteProjects Pro. See [Importing Resource Information from SuiteProjects Pro into Microsoft Project When Only Resources Booked to the Project Are Available for Task Assignment](#).

To import resource information from SuiteProjects Pro into Microsoft Project when all resources are always available for task assignment:

1. In Microsoft Project, go to Add-ins and select **Pull SuiteProjects Pro resources** under the SuiteProjects Pro add-in menu.

A confirmation dialog appears asking if you want to import work schedules from SuiteProjects Pro.

Note: If task assignments are restricted, a message displays to inform you that the operation cannot be completed and that you will be able to import resource information from SuiteProjects Pro when exporting a project plan from Microsoft Project to SuiteProjects Pro.

2. You should import company and resource work schedules from SuiteProjects Pro into Microsoft Project. This will ensure that the project plans you create and update in Microsoft project respect the work schedules and work schedule exceptions that are created and maintained in SuiteProjects Pro. Click **Yes** to do so.

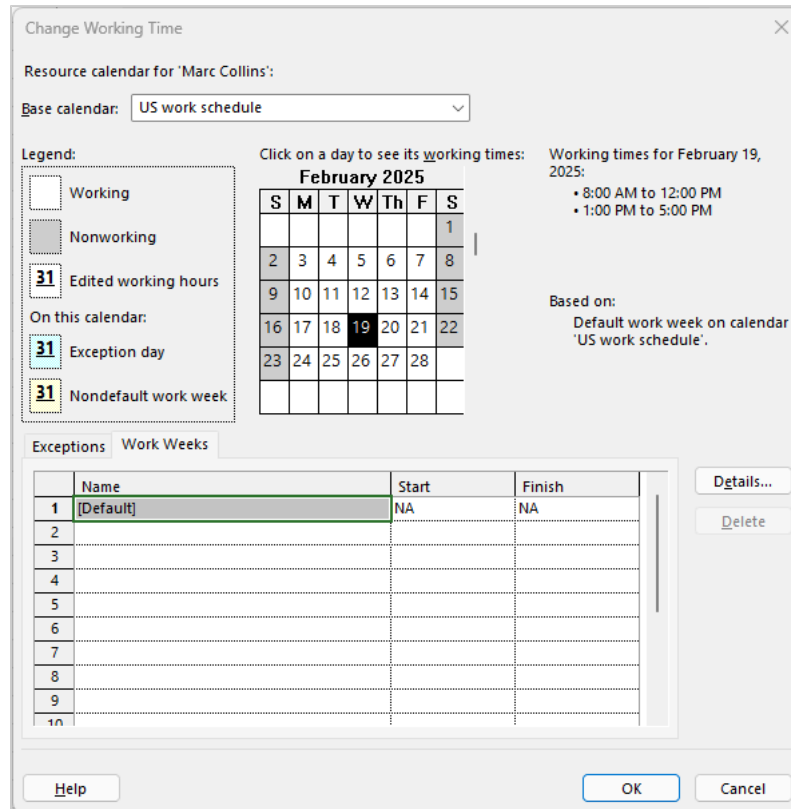
Note: The work schedule import may take a few minutes depending on the size of your company's SuiteProjects Pro account and may overwrite existing resource schedules in Microsoft Project.

You can click **No** to skip the work schedule import.

A window appears showing the progress of the resource information import. To keep the progress status window open after the operation completes, clear the **Close this dialog when completed** box then click **Done** to close it.

3. Verify the resource information import in Microsoft Project. To do so:
 - a. In the Resource ribbon, select **Resource Sheet** from the View dropdown.
The resource sheet appears and shows the resources you have imported from SuiteProjects Pro.
 - b. Right-click a Resource Name and select **Information**.
 - c. Click **Change Working Time**.

The Change working time window appears. Compare the information with the work schedule and schedule exception information from SuiteProjects Pro.



Importing Resource Information from SuiteProjects Pro into Microsoft Project When Only Resources Booked to the Project Are Available for Task Assignment

Use the following steps to import resource information from SuiteProjects Pro into Microsoft Project if only resources booked to the project are available for assignment to tasks in your company's SuiteProjects Pro account.

To import resource information from SuiteProjects Pro into Microsoft Project when only resources booked to the project are available for task assignment:

- Do one of the following:
 - In Microsoft Project, create a project plan and export it to SuiteProjects Pro as a new project. Link the Microsoft Project project file with the project in SuiteProjects Pro by checking the **Lock project plan for editing in SuiteProjects Pro** box. See [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#).
 - In SuiteProjects Pro, create an empty project. "Empty" project refers to a project that has no tasks, phases or milestones associated with it.
- In SuiteProjects Pro, create bookings to the project created in step 1 for the resources selected in your Microsoft Project project plan.
- In Microsoft Project, export your project plan to the existing project created in step 1. See [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#).

If only resources booked to the project are available for task assignments in your company's SuiteProjects Pro account and you are exporting to an existing project, a message appears asking

if you want to import resources booked to the project from SuiteProjects Pro into Microsoft Project. Click **Yes** to import resource information before continuing to set up the export.

Exporting a Project Plan from Microsoft Project to SuiteProjects Pro

After you connect Microsoft Project with your SuiteProjects Pro account, you can export project plans from Microsoft Project to SuiteProjects Pro. You can export task information along with your project schedule and map standard or custom fields in Microsoft Project to standard or custom fields in SuiteProjects Pro

You can:


- Create a project sequence, and assign resources to tasks in Microsoft Project first and then export it to SuiteProjects Pro as a new project (initial export to a new project).


To do so, clear the **Export to an existing project** box when setting up the export.

- Create a project sequence, and assign resources to tasks in Microsoft Project first and then export it to an existing empty project in SuiteProjects Pro (initial export to an empty project). "Empty" project refers to a project that has no tasks, phases or milestones associated with it.

To do so, check the **Export to an existing project** box when setting up the export and be sure to select an empty project to export the information to in SuiteProjects Pro. An empty project is a project that has no tasks, phases or milestones associated with it.

- Update your project sequence, task information and assignments in Microsoft Project and then export the changes to the corresponding project in SuiteProjects Pro, where you can continue to track hours worked, approved and billed. To do so, you must first link the Microsoft Project project file with the project in SuiteProjects Pro by checking the **Lock project plan for editing in SuiteProjects Pro** box when setting up the initial export. This locks the project sequence and task information for editing in SuiteProjects Pro.

 **Note:** To update the existing project sequence and task information of a SuiteProjects Pro project that is not linked to a Microsoft Project project file and not locked for editing in Microsoft Project, you must first import the project from SuiteProjects Pro into Microsoft Project and lock the project for editing in SuiteProjects Pro when setting up the import. See [Importing a Project Plan from SuiteProjects Pro into Microsoft Project](#).

 **Important:** When editing your project sequence in Microsoft Project, always use drag and drop and never delete a task if this task has transactions associated with it in SuiteProjects Pro.

To export a project plan from Microsoft Project to SuiteProjects Pro:

1. In Microsoft Project, go to Add-ins and select **Push to SuiteProjects Pro** under the SuiteProjects Pro add-in menu.

Project Connector retrieves information from your SuiteProjects Pro account. A window appears showing the progress of the operation.

2. To keep the progress status window open after the operation completes, clear the **Close this dialog when completed** box then click **Done** to close it.

The Export To SuiteProjects Pro window appears. If you already worked with the SuiteProjects Pro add-in in the same Microsoft Project session, the window shows settings from the previous operation.

Export To SuiteProjects Pro

Project name
Altima Technology - ERP Integration

Client
Altima Technology

Project stage
Pending

Resource mapping

Microsoft Project Resource	SuiteProjects Pro User
Abby Kwan	Abby Kwan
Adam Minister	Adam Minister
Alex Pimm	Alex Pimm
Alice Sheffield	Alice Sheffield
Analyst	Analyst
Ann Traynor	Ann Traynor
Beth Castle	Beth Castle
Bill Carr	Bill Carr

Lock project plan for editing in SuiteProjects Pro

Export to an existing project

3. Review these settings and change selections and clear boxes as necessary. Some of the settings and the values you select or enter depend on whether you are performing the initial export of a project plan to SuiteProjects Pro as a new project, or to an existing empty project, or if you are updating a project that is locked for editing in SuiteProjects Pro.

	Initial Export		Update
Setting	New SuiteProjects Pro project	Empty SuiteProjects Pro project	Locked SuiteProjects Pro project
Export to an existing project	Clear this box.	Check this box.	Check this box.
Project name (text input) OR Project (dropdown)	Project name – Enter the name of the project to be created in SuiteProjects Pro. By default, the name of the project is sourced from the name of your Microsoft Project project file.	Project – Select a project. The project must be empty, that is, there must be no tasks or phases associated with this project. A message appears advising you to select an empty	Project [Read-only] – The name of the project in SuiteProjects Pro that is linked with the Microsoft Project project file.
Customer	Select the customer associated with the project to be created.	—	—
Project stage	Select the project stage for the project to be created.	Select the project stage for this project.	Select the project stage for this project.
Lock project plan for editing in SuiteProjects Pro	Check this box if you want to link the Microsoft Project project file to the project in SuiteProjects Pro. This will enable you to make future changes to you project plan in Microsoft Project and use the SuiteProjects		Check this box if you want to make future changes to you project plan in Microsoft Project and use the

—	Initial Export		Update
Setting	New SuiteProjects Pro project	Empty SuiteProjects Pro project	Locked SuiteProjects Pro project
	Pro add-in to update the corresponding project in SuiteProjects Pro.		SuiteProjects Pro add-in to update the corresponding project in SuiteProjects Pro.

Note: If the **Lock project plan for editing in SuiteProjects Pro** box is checked and the **Export to an existing project** box is not checked when updating a project in SuiteProjects Pro from Microsoft Project, a message appears warning you that another project in SuiteProjects Pro is already linked to this Microsoft Project project file, and that the previous link between the Microsoft Project file and the project in SuiteProjects Pro will no longer be usable if you continue with the export. You can click **Yes** to continue with the export and create a new link (new MDB file), or click **No** to cancel the export and review your export settings.

4. In the following scenarios, a message appears:
- If only resources booked to the project are available for task assignments in your company's SuiteProjects Pro account and you are exporting to an existing project, the message asks if you want to import resources booked to the project from SuiteProjects Pro into Microsoft Project. In this case, the mention "Filtered by booking status" shows in red color above the resource mapping table.
 - If your company's SuiteProjects Pro account lets you assign any resources to tasks when none are booked to the project and you are exporting the project plan to SuiteProjects Pro as a new project, or you are exporting to an existing project and no resources are booked to that project, the message asks if you want to import all resources that you have access to from SuiteProjects Pro into Microsoft Project.

Click **Yes** to add the SuiteProjects Pro resources as available resources in Microsoft Project, or click **No** to skip the resource information import. See also [Importing Resource Information from SuiteProjects Pro into Microsoft Project](#).

5. Review the mapping of resources between Microsoft Project and SuiteProjects Pro. Ensure that all resources are correctly mapped. The resource mapping is done automatically when resource names match in both applications.


To change a mapped resource, click the name under **SuiteProjects Pro User**. For more information about mapping of resources, see [Resource Assignment Mapping](#).

6. Review and change advanced settings as applicable. See [Advanced Export and Import Settings](#). You typically set the advanced settings one time unless you need to make any change. Project Connector remembers these settings.

You can control the following settings:


- **Priorities** – SuiteProjects Pro and Microsoft Project let you set a priority for each task, which indicates the relative importance given to that task. Equivalent priority levels are set when transferring project plan information between Microsoft Project and SuiteProjects Pro. Priority level indicate the level of importance given to a task relative to other tasks. See [Task Priority Settings](#).
 - **Field mapping** – Map standard or custom fields for tasks in Microsoft Project with the equivalent standard or custom fields in SuiteProjects Pro. Field mapping lets you configure the task information that you want to transfer between SuiteProjects Pro and Microsoft Project. See [Field Mapping](#)
7. Check the **Lock project plan for editing in SuiteProjects Pro** box if you want to link the Microsoft Project project file to the project in SuiteProjects Pro and lock the exported project sequence

and task information for editing in SuiteProjects Pro. If the project plan is locked for editing in SuiteProjects Pro, all future updates to the project sequence and task information must be done in Microsoft Project first, and then exported to SuiteProjects Pro. Locking the project plan in SuiteProjects Pro only locks the project sequence and task information for editing. You can still view all project and task information in SuiteProjects Pro. Hours worked, approved and billed for the locked project are calculated in SuiteProjects Pro.

 **Note:** Account administrators and users with the *Unlock projects (locked by SuiteProjects Pro Project Connector)* role permission can unlock the project for editing in SuiteProjects Pro and unlink the Microsoft Project project file and the project in SuiteProjects Pro. See [Unlocking a Project in SuiteProjects Pro](#).


8. (Optional) Click **Check Schedules**.

After the schedule check completes, a message appears indicating whether there are schedule exceptions.

 **Note:** You should check for differences in work schedules between the two applications as these may cause task dates and duration to change when exporting the project plan to SuiteProjects Pro.

9. Click **OK** to export the project plan to SuiteProjects Pro.

- a. If you did not map all resources, Project Connector can map unmapped resources automatically to unassigned in SuiteProjects Pro. Tasks will not include assignments for unmapped resources in the exported project in SuiteProjects Pro. A message appears. Click **Yes** to continue with the export without the task assignments for unmapped resources, or click **No** to go back to the import settings and review the resource mapping,
- b. If you did not check for differences in work schedules or made any changes to the resource mapping after running the schedule check, a message appears to give you an opportunity to run the schedule check now. Click **Yes** to run the schedule check, or click **No** to skip the check.
- c. A window appears showing the progress of the operation.
- d. Check the **Close this dialog when completed** box to close the window automatically after the operation completes or click **Done** when completed.

 **Important:** When you export a project plan from Microsoft Project to SuiteProjects Pro, Project Connector creates an MDB file in the same directory as your MPP project file. This file holds information about the project plan integration between Microsoft Project and SuiteProjects Pro. You must keep both files in the same directory to be able to export your updated project schedule and task information to SuiteProjects Pro after you make changes in Microsoft Project.

Importing a Project Plan from SuiteProjects Pro into Microsoft Project

After you connect Microsoft Project with your SuiteProjects Pro account, you can import project sequence and task information from SuiteProjects Pro into Microsoft Project as a new project file. You can map standard or custom fields in Microsoft Project to standard or custom fields in SuiteProjects Pro. You can also import resource information for the resources that are assigned to tasks in the project you are importing.

You can then update your project sequence, task information and assignments in Microsoft Project and export the changes to the corresponding project in SuiteProjects Pro, where you can continue to track hours worked, approved and billed. To do so, you must first link the Microsoft Project project file with the project in SuiteProjects Pro by checking the **Lock project plan for editing in SuiteProjects Pro** box when setting up the initial import. This locks the project sequence and task information for editing in SuiteProjects Pro.

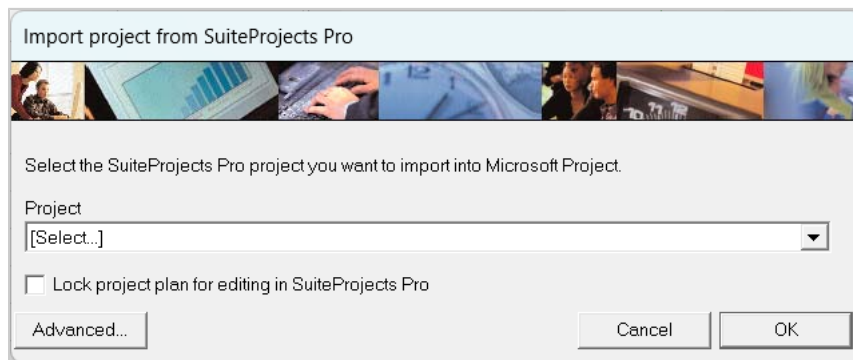
To import a project from SuiteProjects Pro into Microsoft Project:

1. In Microsoft Project, go to Add-ins and select **Pull from SuiteProjects Pro** under the SuiteProjects Pro add-in menu.

A blank project appears. Project Connector retrieves information from your SuiteProjects Pro account. A window appears showing the progress of the operation.

2. To keep the progress status window open after the operation completes, clear the **Close this dialog when completed** box then click **Done** to close it.

The Import Project From SuiteProjects Pro window appears. If you already worked with the SuiteProjects Pro add-in in the same Microsoft Project session, the window shows settings from the previous operation.



3. Select the SuiteProjects Pro project that you want to import.

Note: If the project you select is locked for editing in SuiteProjects Pro, a message appears to inform you that the project is already linked to another Microsoft Project project file. Click **OK** to go back to the import setup window.

You can import a project that is already linked to an existing Microsoft Project project file. However, the import will not replace the existing link. The new project file resulting from this import will not be linked to your project in SuiteProjects Pro and you will not be able to work from this new project file and export changes to update your project in SuiteProjects Pro.

To work from the new project file instead of the already linked project file for future updates:

1. Cancel the current import.
2. Unlock the project for editing in SuiteProjects Pro. See [Unlocking a Project in SuiteProjects Pro](#).
3. Repeat the import.

4. Check the **Lock project plan for editing in SuiteProjects Pro** box if you want to link the Microsoft Project project file to the project in SuiteProjects Pro and lock the imported project sequence and task information for editing in SuiteProjects Pro. If the project plan is locked for editing in SuiteProjects Pro, all future updates to the project sequence and task information must be done in Microsoft Project first, and then exported to SuiteProjects Pro. Locking the project plan in SuiteProjects Pro only locks the project sequence and task information for editing. You can still view all project and task information in SuiteProjects Pro. Hours worked, approved and billed for the locked project are calculated in SuiteProjects Pro.

Note: Account administrators and users with the *Unlock projects (locked by SuiteProjects Pro Project Connector)* role permission can unlock the project for editing in SuiteProjects Pro and unlink the Microsoft Project project file and the project in SuiteProjects Pro. See [Unlocking a Project in SuiteProjects Pro](#).

5. Review and change advanced settings as applicable. See [Advanced Export and Import Settings](#). You typically set the advanced settings one time unless you need to make any change. Project Connector remembers these settings.

You can control the following settings:

- **Priorities** – SuiteProjects Pro and Microsoft Project let you set a priority for each task, which indicates the relative importance given to that task. Equivalent priority levels are set when transferring project plan information between Microsoft Project and SuiteProjects Pro. Priority level indicate the level of importance given to a task relative to other tasks. See [Task Priority Settings](#).
- **Field mapping** – Map standard or custom fields for tasks in Microsoft Project with the equivalent standard or custom fields in SuiteProjects Pro. Field mapping lets you configure the task information that you want to transfer between SuiteProjects Pro and Microsoft Project. See [Field Mapping](#)
- **(Import only) Other import settings** – These additional settings let you control how Project Connector should handle timesheet hours when importing project plan information from

SuiteProjects Pro or whether Project Connector should import all resources or only assigned resources with the project plan information, for example. See [Other Import Settings](#).

6. Click **OK**.

A message appears asking whether you want to save the new project.

7. Click **Yes**. The project must be saved as a Microsoft Project project file before importing information from SuiteProjects Pro.
8. Enter a file name, and click **Save**.



Important: If you are importing a locked project, make sure that you do not save as the existing Microsoft Project project file that is already linked to the project in SuiteProjects Pro. Doing so would damage the linked project file and the project file would become unusable. See also [Frequently Asked Questions](#) for more information.

A message appears asking whether you want to import work schedule information.

9. You should import company and resource work schedules from SuiteProjects Pro into Microsoft Project. This will ensure that the project plans you create and update in Microsoft project respect the work schedules and work schedule exceptions that are created and maintained in SuiteProjects Pro. Click **Yes** to do so.



Note: You can click **No** to skip the work schedule import.

A window appears showing the progress of the operation. To keep the progress status window open after the operation completes, clear the **Close this dialog when completed** box then click **Done** to close it.

Advanced Export and Import Settings

When you export a project plan from Microsoft Project to SuiteProjects Pro or import a project plan from SuiteProjects Pro into a Microsoft Project project file, you can control the following settings:

- **Priorities** – SuiteProjects Pro and Microsoft Project let you set a priority for each task, which indicates the relative importance given to that task. Equivalent priority levels are set when transferring project plan information between Microsoft Project and SuiteProjects Pro. Priority level indicate the level of importance given to a task relative to other tasks. See [Task Priority Settings](#).
- **Field mapping** – Map standard or custom fields for tasks in Microsoft Project with the equivalent standard or custom fields in SuiteProjects Pro. Field mapping lets you configure the task information that you want to transfer between SuiteProjects Pro and Microsoft Project. See [Field Mapping](#)
- **(Import only) Other import settings** – These additional settings let you control how Project Connector should handle timesheet hours when importing project plan information from SuiteProjects Pro or whether Project Connector should import all resources or only assigned resources with the project plan information, for example. See [Other Import Settings](#).

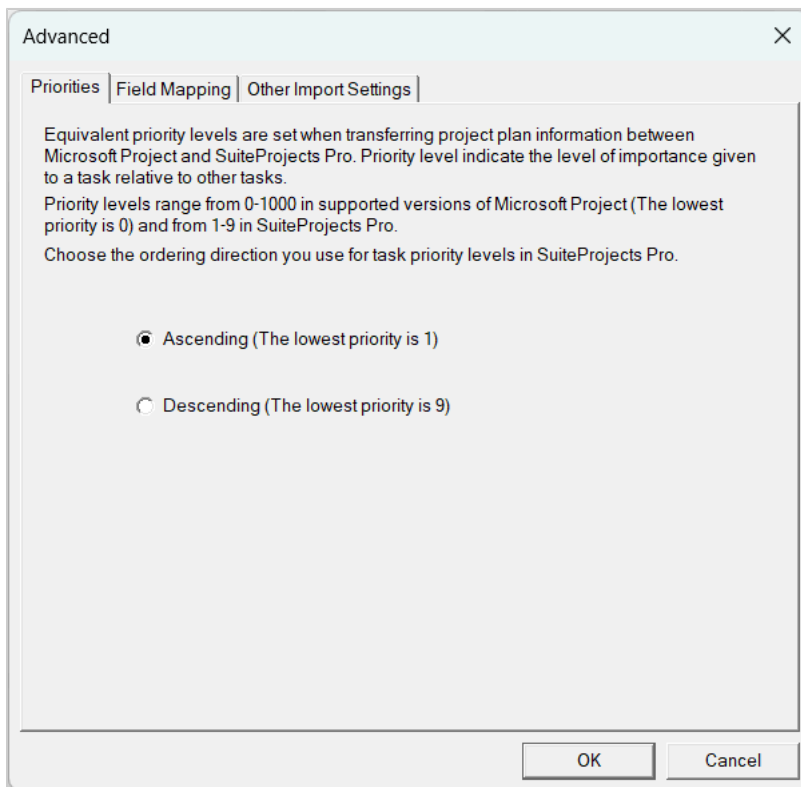
Task Priority Settings

SuiteProjects Pro and Microsoft Project let you set a priority for each task, which indicates the relative importance given to that task. Equivalent priority levels are set when transferring project plan information between Microsoft Project and SuiteProjects Pro. Priority level indicate the level of importance given to a task relative to other tasks. Priority levels range from 0-1000 in supported versions of Microsoft

Project (the lowest priority is 0) and from 1-9 in SuiteProjects Pro. You can choose whether priority levels in SuiteProjects Pro are in ascending order (the lowest priority is 1 – this is the default option) or in descending order (the lowest priority is 9).

To change task priority settings:

1. In the export or import setup window, click **Advanced** then click the Priorities tab.
2. Choose the ordering direction you work with for task priority levels in SuiteProjects Pro.
3. Click **OK**.



Field Mapping

When you export a project plan from Microsoft Project to SuiteProjects Pro, or import a project plan from SuiteProjects Pro into Microsoft Project, you can map standard or custom fields for tasks in Microsoft Project with the equivalent standard or custom fields for tasks in SuiteProjects Pro. Field mapping lets you configure the task information that you want to transfer between SuiteProjects Pro and Microsoft Project.

You only need to map Microsoft Project and SuiteProjects Pro fields one time. Project Connector remembers the field mapping.

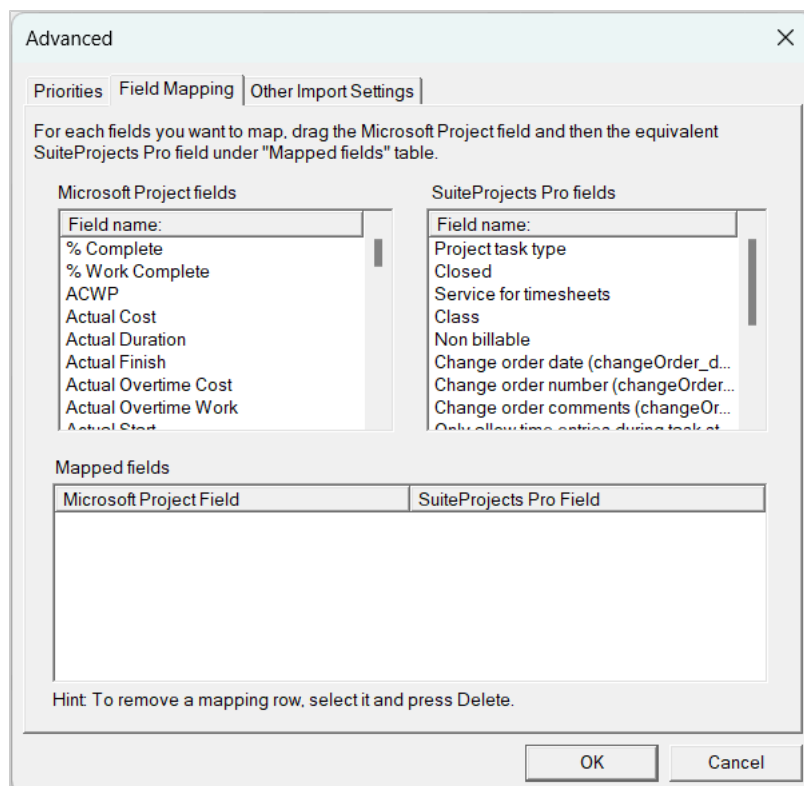
The following custom fields may be useful when using Project Connector:

- In SuiteProjects Pro, create a custom field for tasks to hold the built-in Microsoft WBS code and map it to the Microsoft Project standard field **WBS**. For more information about creating custom fields in SuiteProjects Pro, see the help topic [Creating and Modifying Custom Fields](#).

- In Microsoft Project, create the following custom fields for tasks and populate them in your project plan. You can then map them to the equivalent standard field in SuiteProjects Pro when setting up your import or export. For more information about creating custom fields in Microsoft Project, see [Creating Custom Fields in Microsoft Project](#).
 - **Closed task** – Values in SuiteProjects Pro are either 0 (open task) or 1 (closed task).
 - **Task type** – Values are defined in Administration > Application Settings > Projects > Task types in SuiteProjects Pro. Values in the custom field value list must match exactly the **Name** of the task type as defined in SuiteProjects Pro.
 - **Service** – Values are defined in Administration > Application Settings > Timesheets > Services in SuiteProjects Pro. Values in the custom field value list must match exactly the **Name** of the service as defined in SuiteProjects Pro.

To map Microsoft Project and SuiteProjects Pro fields:

1. In the export or import setup window, click **Advanced** then click the Field Mapping tab.
2. To add a field mapping:
 - a. Drag a **Microsoft Project field** containing the information you want to export into the **Mapped fields** table under the Microsoft Project column.
 - b. Drag the **SuiteProjects Pro field** you want to export this information to into the **Mapped fields** table under the SuiteProjects Pro column.
3. To delete a field mapping:
 - a. Click the row you want to delete in the **Mapped fields** table.
 - b. Press Delete.
4. Click **OK** to save the field mapping and return to the export or import setting window.




Creating Custom Fields in Microsoft Project

Use the following steps to create custom fields in Microsoft Project. These steps are provided for illustration purposes only. For more information about custom fields in Microsoft Project, refer to the vendor documentation.

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


1. In Microsoft Project, click Tools and select Customize, then Fields.
The Customize Fields window appears.
2. In the Custom Fields tab:
 - a. Under **Field**, choose Task.
 - b. Under **Type**, select Text.
A list of Text<#> custom fields appears.
3. Repeat the following for each custom field you want to add:
 - a. Select an available custom field.
 - b. Click **Rename**, enter the new name for the custom field, then click **OK**.
The new name appears in the custom field list with the default custom field name in parenthesis.
 - c. Click **Value List**
The Value List for "<custom field name>" window appears.
 - d. Enter values and descriptions to match the possible values in SuiteProjects Pro under the Value and Description fields. For example, for the **Closed task** custom field enter the following rows:

Row	Value	Description
1	1	Closed
2	<i>blank</i>	Open

 **Note:** Leave the value blank for Open tasks, which corresponds to zero in SuiteProjects Pro.

A message appears to inform you that data entry is limited to the values defined in the value list, and that continuing with this set up will delete any existing values for the custom field that are not in the value list.

- e. If values for the corresponding SuiteProjects Pro field are defined as record names (if you are setting up a custom field to hold task type or service information, for example), verify that all the values in the custom field value list match exactly the names defined in SuiteProjects Pro.
- f. Click **OK**.

 **Note:** When you select the custom field in the Field Mapping tab of the advanced export or import settings window, a message appear to remind you that you need to make sure the values defined in Microsoft Project match the names defined in SuiteProjects Pro.

4. Click **OK**.

To populate custom field values for tasks in Microsoft Project, open the Task Information window and click the Custom Fields tab, then select the value for each custom field as applicable.

Other Import Settings

To change other import settings:

1. In the import setup window, click **Advanced** then click the Settings tab.
2. To import timesheet hours from SuiteProjects Pro into Microsoft Project as actual work hours, check the **Import Actual Work hours from** box (cleared by default), then choose one of the following options:
 - All timesheet hours – Project Connector imports all hours recorded in open, submitted and approved timesheets.
 - Approved timesheet hours – Project Connector imports all hours recorded in approved timesheets only.

Note: Remember the following guidelines:

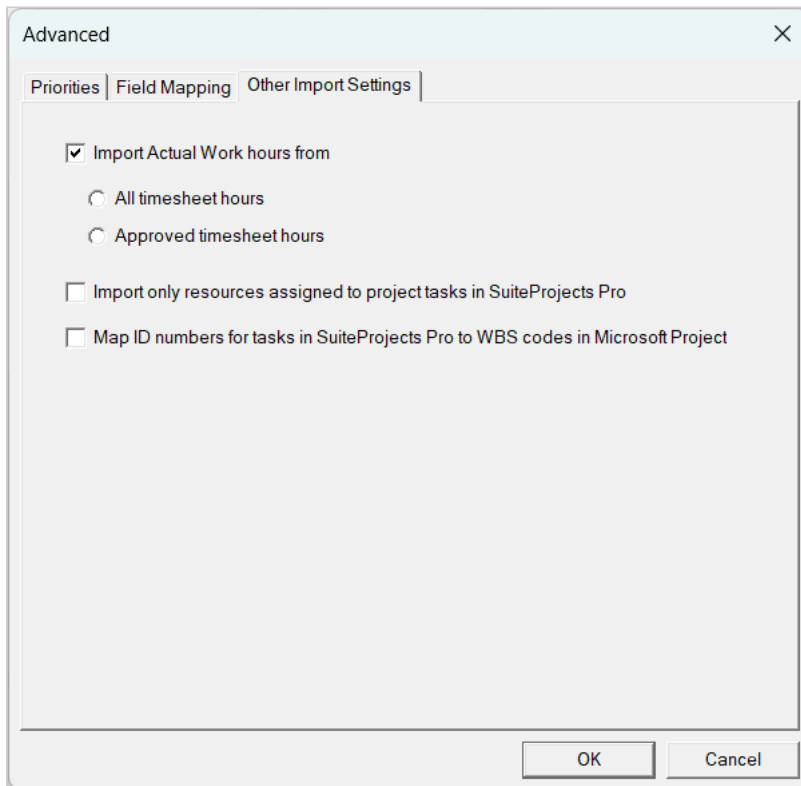
- Importing worked hours from SuiteProjects Pro into Microsoft Project as actual work hours creates a discrepancy in task duration between the two applications. Worked hours from timesheets do not impact task duration in SuiteProjects Pro, whereas Actual Work hours impact Work Hours, which in turn impact task duration in Microsoft Project.
- Depending on the configuration of your company's SuiteProjects Pro account, employees may be able to record time against a task that they are not assigned to. Worked hours against a task are not imported if the resource who recorded these hours in SuiteProjects Pro is not assigned to the task and a warning entry is added to the Project Connector log.
- Percent complete information is not imported from SuiteProjects Pro into Microsoft project. Percent Complete changes impact Actual Work hours in Microsoft Project, which in turn impact task duration.

A message appears if you check the **Import Actual Work hours from** box to remind you of these guideline. Click **OK** to continue.

3. To import only information for resources who are assigned to project tasks in SuiteProjects Pro, check the **Import only resources assigned to project tasks in Suite Projects Pro** box. Otherwise, information for all resources that you have access to will be imported from SuiteProjects Pro into Microsoft Project.
4. To map the task **ID number** in SuiteProjects Pro to the **WBS** field in Microsoft Project, check the **Map ID numbers for tasks in SuiteProjects Pro to WBS codes in Microsoft Project** box.

Note: This mapping only works when importing a project plan from SuiteProjects Pro into Microsoft Project. However, when you export the project plan from Microsoft Project back to SuiteProjects Pro, the task **ID number** will be replaced with the task sequence number in Microsoft Project. To track the WBS code in SuiteProjects Pro, create a custom field for tasks in SuiteProjects Pro and map it to the WBS standard field in Microsoft Project. See [Field Mapping](#).

5. Click **OK**.



Unlocking a Project in SuiteProjects Pro

After you lock project schedule and task information for editing in SuiteProjects Pro you can do one of the following to unlock it:

- If you are an account administrators or have the *Unlock projects (locked by SuiteProjects Pro Project Connector)* role permission, in SuiteProjects Pro, go to the locked project, click the Tips button. The contextual tips mention that some information cannot be modified because the project is locked by Project Connector and includes a link to unlock the project. Click the link to unlock the project.

Note: If the role form does not include the *Unlock projects (locked by SuiteProjects Pro Project Connector)* role permission, contact SuiteProjects Pro Support and request the following configuration setting for your company's SuiteProjects Pro account: Enable unlocking of projects (locked by SuiteProjects Pro Project Connector)

- In Microsoft Project, open the project file linked to the project in SuiteProjects Pro that you want to unlock, export the project plan to SuiteProjects Pro with the **Export to an existing project** box checked and the **Lock project plan for editing in SuiteProjects Pro** box cleared. See [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#).

Note: After the project is unlocked, you can import it from SuiteProjects Pro into Microsoft Project. See [Importing a Project Plan from SuiteProjects Pro into Microsoft Project](#).

Remember that, to be able to update the project in Microsoft Project and export the changes back to the project in SuiteProjects Pro, you must check the **Lock project plan for editing in SuiteProjects Pro** box when setting up the import.

Locking a Project in SuiteProjects Pro

You can lock a project in SuiteProjects Pro when you export it from Microsoft Project to SuiteProjects Pro or when you import it from SuiteProjects Pro into Microsoft Project. If you lock a project in SuiteProjects Pro, you can modify the project plan in Microsoft Project and export the updated project schedule, task and task assignment information back to the linked project in SuiteProjects Pro. If you do not lock the project in SuiteProjects Pro, you cannot export project plan changes to this same project; you can only export the project plan to a new project in SuiteProjects Pro.

To lock a project:

- When exporting a project plan from Microsoft Project to SuiteProjects Pro, make sure that you check the **Lock project plan for editing in SuiteProjects Pro** box when setting up the export. See [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#).
- When importing a project plan from SuiteProjects Pro into Microsoft Project, make sure you check the **Lock project plan for editing in SuiteProjects Pro** box when setting up the import. See [Importing a Project Plan from SuiteProjects Pro into Microsoft Project](#).

Application Differences

There are fundamental differences between SuiteProjects Pro and Microsoft Project. Project Connector cannot compensate for these differences, but with a better understanding of how each application 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 about how data are handled by each software program see [Details About Hours](#).

SuiteProjects Pro	Microsoft Project
Planned hours	Work hours
Worked hours	Actual work
Gap	Remaining work
<i>No standard equivalent in SuiteProjects Pro</i>	Overtime work
Estimated hours	<i>No standard equivalent in Microsoft Project</i>
Remaining Hours	<i>No standard equivalent in Microsoft Project</i>
Billed hours	<i>No standard equivalent in Microsoft Project</i>

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 SuiteProjects Pro, all tasks behave like Microsoft Project fixed units tasks. If you change the units, that is, the percentage of time a resource is assigned, SuiteProjects Pro recalculates the duration. While duration cannot be directly changed in SuiteProjects Pro, 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 SuiteProjects Pro, you cannot select whether a task is effort-driven. SuiteProjects Pro 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, SuiteProjects Pro'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, SuiteProjects Pro 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 account configuration settings that govern task constraints in SuiteProjects Pro: "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 enter a start date or a finish date manually 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 sequence position in the overall project plan.

Details About Hours

SuiteProjects Pro and Microsoft Project applications both handle hours and work fields. While functionality is comparable, there are some important differences.

The following table highlights the areas where differences exist.

SuiteProjects Pro	Microsoft Project
Planned hours	Work hours
Worked hours	Actual work
Gap	Remaining work
<i>No standard equivalent in SuiteProjects Pro</i>	Overtime work
Estimated hours	<i>No standard equivalent in Microsoft Project</i>
Remaining Hours	<i>No standard equivalent in Microsoft Project</i>
Billed hours	<i>No standard equivalent in Microsoft Project</i>

The following describe those differences in some detail:

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

SuiteProjects Pro Planned Hours VS. Microsoft Project Work Hours

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

SuiteProjects Pro Planned Hours

Unlike work hours in Microsoft Project, SuiteProjects Pro 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. SuiteProjects Pro does not change the plan if worked hours exceed planned hours. Planned hours in SuiteProjects Pro act as budget hours for the task. The number of hours logged against the task has no affect on the number of planned hours. While SuiteProjects Pro gap hours are related to planned hours, the planned hour field is not comprised of other fields as it is in Microsoft Project.

SuiteProjects Pro 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 SuiteProjects Pro 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.

SuiteProjects Pro 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 SuiteProjects Pro, 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 worked against the task.

Although worked hours can drive percent complete in SuiteProjects Pro, and they generally do, percent complete never determines the number of hours worked since these hours are sourced 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.

SuiteProjects Pro Gap Hours VS. Microsoft Project Remaining Work

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

However, there is one significant difference. You cannot edit gap hours in SuiteProjects Pro, 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

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

SuiteProjects Pro Estimated Hours

SuiteProjects Pro 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 Project Connector.

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

SuiteProjects Pro Remaining Hours

SuiteProjects Pro 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 Project Connector.

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

SuiteProjects Pro Billed Hours

SuiteProjects Pro has a field for billed hours, and Microsoft Project does not. Billed hours are hours from charges (time bills) in the Invoices module and include hours from all charges (time bills), whether they are open or invoiced. This information is not transferred using Project Connector.

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

References

This section includes reference information about the following:

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

Field Mapping Reference

The following table list field mapping for standard task information between SuiteProjects Pro and Microsoft Project.

SuiteProjects Pro field	Microsoft Project field	Notes
Duration	Duration	In SuiteProjects Pro, the start and finish dates in are calculated based on the duration by default. An optional setting allows Project Connector to set fixed start and end dates in SuiteProjects Pro based on the start and finish dates in Microsoft Project when exporting a project plan from Microsoft Project to SuiteProjects Pro.
ID	ID	—
Phase name	Summary task name	—
Task name	Task name	—
Predecessor	Predecessor	—
Resource task assignment and % allocation	Resource names and % allocation units	—
% complete	% complete	Omitted task percent complete information is not populated in the source application.
<ul style="list-style-type: none"> ■ Planned hours (when exporting from Microsoft Project to SuiteProjects Pro) ■ Total time entered against the task by resources assigned to that task (when importing from SuiteProjects Pro into Microsoft Project) 	Actual work	<ul style="list-style-type: none"> ■ Included on export only if your company's SuiteProjects Pro account is configured to allow planned hours for each resource assigned to a task. ■ Optional on import, depending on the import advanced settings. The total time can be sourced from all timesheets or from approved timesheets only. See Other Import Settings.

Resource Assignment Mapping

SuiteProjects Pro maps Microsoft Project resource assignments using the following guidelines:

- A Microsoft Project resource name maps to a SuiteProjects Pro employee name. You can make changes to this mapping in the export settings when exporting a project to SuiteProjects Pro. See [Exporting a Project Plan from Microsoft Project to SuiteProjects Pro](#).
- Each task and task duration in a Microsoft Project convert to a task and task duration in SuiteProjects Pro. You can view the tasks and planned hours, as well as other pertinent task information in the exported project plan by going to Projects > Projects > [select a project] > Phases/Tasks: Outline in SuiteProjects Pro.
- The percentage allocation for each user on a task in Microsoft Project converts to the same percentage assignment for that task in SuiteProjects Pro. You can view this information by going to Projects > Projects > [select a project] > Phases/Tasks: Outline in SuiteProjects Pro.
- Work schedules are respected when exporting task information from Microsoft Project to SuiteProjects Pro. Task duration is distributed according to the employee's work schedule. To view work schedule information in SuiteProjects Pro, go to Administration > Global Settings > Users > Employees > [Select an employee] > Schedule.
- Your company's SuiteProjects Pro account configuration may restrict who you can assign to a task based on whether the resource is booked to the project. Account administrators control this setting in Administration > Application Settings > Projects > Other settings in SuiteProjects Pro. See [Importing Resource Information from SuiteProjects Pro into Microsoft Project](#).

Frequently Asked Questions

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

- [FAQ: Project Export and Import](#)
- [FAQ: Locked and Unlocked files](#)
- [FAQ: SuiteProjects Pro Resources](#)
- [FAQ: Transfer of Planned Hours](#)
- [FAQ: Transfer of Worked Hours](#)
- [FAQ: Date Mismatch between Microsoft Project and SuiteProjects Pro](#)
- [FAQ: Log File Location](#)

FAQ: Project Export and Import

The following are frequently asked questions and their answers about exporting and importing projects to and from SuiteProjects Pro.

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

Answer: Yes, review the following guidelines:

- Avoid deleting tasks in Microsoft Project. This is especially true for tasks that are already used in SuiteProjects Pro in any transactions such as timesheets and invoices. The corresponding tasks will not delete in SuiteProjects Pro, 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 SuiteProjects Pro. 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 SuiteProjects Pro 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. SuiteProjects Pro only supports fixed units task types because it recalculates duration based on changes to units or allocation of resources.
- Never export a file to a different SuiteProjects Pro server. If using a test environment, lock the file in SuiteProjects Pro, import it into Microsoft Project, edit it, and export it back to the same SuiteProjects Pro server.

2. I tried to export a file to SuiteProjects Pro and nothing occurred 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 export it from there. If it still doesn't work, [Creating a Support Case](#).

3. I am trying to use Project Connector to export a project from Microsoft Project to SuiteProjects Pro. 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 Project Connector with your real account, change the server in the account settings and enter your account information — See [Connecting Microsoft Project with Your SuiteProjects Pro Account](#) for details. Remember, you must have the required role privileges in SuiteProjects Pro.

4. I created a project initially in Microsoft Project, then exported it to SuiteProjects Pro. I renamed the project in Microsoft Project and tried to export it to SuiteProjects Pro, but it didn't work. Why?

Answer: Project 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 exporting it to SuiteProjects Pro. 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 SuiteProjects Pro?

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 export it to SuiteProjects Pro or make changes in SuiteProjects Pro and then lock the file as you import it from SuiteProjects Pro.

6. If I export a Microsoft Project plan to SuiteProjects Pro and lock the project, will a different user be able to update the project later?

Answer: Yes, if 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 Project Connector, export the project to an existing project in SuiteProjects Pro, and proceed with the update. Never update the same project in SuiteProjects Pro from multiple versions of Microsoft Project files. This will create corruption of data.

7. I exported a project to SuiteProjects Pro and locked it. I asked for a test account and SuiteProjects Pro copied the files from my production account to that test environment. I updated the project in Microsoft Project, and when I exported it back to SuiteProjects Pro 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, import the project from that account, make changes, and export it back to the same account. That is the only valid way to test functionality.

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

Answer: You must not do this. If `project-plan.mpp` and `project-plan.mdb` match, that is, the names are the same, Project Connector will not allow you to export this overwritten project to SuiteProjects Pro. 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. When you import a project plan from SuiteProjects Pro and lock it, you should then save it as a new file. Edit that file in Microsoft Project and export it back to the same project in SuiteProjects Pro.

9. **I exported a Microsoft Project file to a locked project in SuiteProjects Pro and got a message that the Microsoft Project file does not match the one used when exporting the project to SuiteProjects Pro. What can I do?**

Answer: This can happen in any of the following scenarios:

- The MDB file and the MPP file do not match.
- The original MPP file was overwritten when importing a project that was originally exported to SuiteProjects Pro as this does not replace the link between the project in SuiteProjects Pro and the original project file.
- You copied and pasted tasks from another project to this project (known limitation).

If you receive this error, you should:

- a. Unlock the original project in SuiteProjects Pro from the SuiteProjects Pro UI.
- b. Import the project again into Microsoft Project. Be sure to lock it in the import settings.
- c. Make all the changes in Microsoft Project and then export it back to SuiteProjects Pro.

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 SuiteProjects Pro Support, depending on the exact cause of the problem, Engineering may be able to fix the MPP file to be exportable 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 SuiteProjects Pro.

1. **How can I tell whether a project is locked in SuiteProjects Pro?**

Answer: Go 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 Project Connector.

2. **I am trying to export a Microsoft Project file to SuiteProjects Pro, but I'm getting an error message. Why?**

Answer: You are trying to export a project plan to an existing project in SuiteProjects Pro. The project in SuiteProjects Pro is not locked, and already has phases and tasks created. You can export a project plan from Microsoft Project using Project Connector to an existing project in

SuiteProjects Pro, but only if the project in SuiteProjects Pro is empty, that is, the project includes no tasks or phases, or you have previously locked the project in SuiteProjects Pro.

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 exported it to SuiteProjects Pro, and now I want to unlock it so I can make changes to it in SuiteProjects Pro.

Answer: Re-run Project Connector and check the **Export to an existing project** box. Do not check the **Lock project plan for editing in SuiteProjects Pro** box. Because the project in SuiteProjects Pro is linked to a Microsoft Project file, the project is unlocked and you can edit it in SuiteProjects Pro.

Alternatively, you can [Creating a Support Case](#) and request that the following setting be enabled: Enable unlocking of projects (locked by SuiteProjects Pro Project Connector). For more information about unlocking a project, refer to [Unlocking a Project in SuiteProjects Pro](#).

4. I locked a project in SuiteProjects Pro when I imported it into Microsoft Project. How can I unlock the project now?

Answer: Since you have imported the project into Microsoft Project, you can export it to SuiteProjects Pro as unlocked. See the answers above or [Unlocking a Project in SuiteProjects Pro](#).

5. I exported a project to SuiteProjects Pro 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 SuiteProjects Pro using the modified plan. Is there any way I can do that now?

Answer: You can import the project from SuiteProjects Pro to Microsoft Project and check the **Lock this project in SuiteProjects Pro after exporting** box to allow exporting back from Microsoft Project to SuiteProjects Pro. After you make changes to this Microsoft Project plan, export it back to SuiteProjects Pro.

6. I want to export a project plan from Microsoft Project to an existing project in SuiteProjects Pro. Can I do this?

Answer: Yes, but only if the project in SuiteProjects Pro is empty, that is, the project has no tasks or phases already created, or you have previously locked the project in SuiteProjects Pro.

7. I locked a project in SuiteProjects Pro 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 SuiteProjects Pro from the SuiteProjects Pro UI. [Creating a Support Case](#) and request that the following setting be enabled: Enable unlocking of projects (locked by SuiteProjects Pro Project Connector). For more information about unlocking a project, refer to [Unlocking a Project in SuiteProjects Pro](#).

8. I locked a project in SuiteProjects Pro and now I have lost the MPP or MDB files needed to do updates. Can I import the project from SuiteProjects Pro 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 import the locked project from SuiteProjects Pro to Microsoft Project (and lock it) to create a new MPP/MDB file pair from which to update the project in SuiteProjects Pro. You will first have to unlock the project in SuiteProjects Pro from the user interface. Refer to [Unlocking a Project in SuiteProjects Pro](#) for more information. Make sure you give the file a different name when you import it and lock it so you can export it from Microsoft Project. Make changes to the new Microsoft Project file and then export it to SuiteProjects Pro.

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

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

- a. Export the Microsoft Project project plan to SuiteProjects Pro as a new project.
 - b. In SuiteProjects Pro, go to Projects > Projects > [select the new project]. Click Outline view. Select Create > Phase. Move the tasks that you want to add to the original project in SuiteProjects Pro 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 SuiteProjects Pro, and then I unlocked it using Project Connector. Can I use Project Connector again to re-lock the project?**

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

- If the project is empty, that is, has no phases or tasks, you can export the Microsoft Project file to the project in SuiteProjects Pro and check the **Lock project plan for editing in SuiteProjects Pro** box.
- If the project is not empty, you can import the project from SuiteProjects Pro, check the **Lock project plan for editing in SuiteProjects Pro** box.

FAQ: SuiteProjects Pro Resources

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

I imported resources from SuiteProjects Pro and want to assign them to a project in Microsoft Project that I am exporting to SuiteProjects Pro. The list of SuiteProjects Pro users that displays on the SuiteProjects Pro export 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 SuiteProjects Pro 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. After the filter set is changed, click the Refresh button on the SuiteProjects Pro export settings window to populate the user list again. Since Project 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 Project Connector transfer work hours from Microsoft Project to SuiteProjects Pro? I exported a project from Microsoft Project to SuiteProjects Pro that has work hours entered in Microsoft Project but I don't know where they went.

Answer: As of v2.21 of the Project Connector, you can [Creating a Support Case](#) and request that the following settings be enabled: Input planned hours for each user assigned to a task. The Project Connector then exports work hours from Microsoft Project to SuiteProjects Pro 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 SuiteProjects Pro calculates the task planned hours as the sum of planned hours assigned to users. Refer to the following examples.

FAQ: Transfer of Worked Hours


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

1. **Does the Project Connector transfer worked hours from Microsoft Project to SuiteProjects Pro? I exported a project from Microsoft Project with work hours into SuiteProjects Pro. In SuiteProjects Pro, 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 SuiteProjects Pro worked hours. Microsoft Project Work hours are most similar to planned hours in SuiteProjects Pro. 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 Project Connector brings that figure to SuiteProjects Pro.

2. **Does Project Connector transfer worked hours from SuiteProjects Pro to Microsoft Project?**

Answer: Beginning with version 2.17, the Project Connector imports worked hours from SuiteProjects Pro timesheets into Microsoft Project as Actual Work hours. Use Advanced > Settings to select either all timesheet hours or approved timesheet hours.

 **Warning:** SuiteProjects Pro 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 SuiteProjects Pro, users log time against a task they are not assigned to. When you import the project from SuiteProjects Pro into Microsoft Project, those hours are not imported since they are not against an assigned task and a warning is issued.

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

FAQ: Date Mismatch between Microsoft Project and SuiteProjects Pro

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

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

Answer: This happens when your SuiteProjects Pro account has the setting enabled for "user level planned hours" and you have not assigned users to the project tasks in Microsoft Project. In SuiteProjects Pro, 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 export the project to SuiteProjects Pro, the Microsoft Project hours transfer with the tasks.

2. **I exported a Microsoft Project file to SuiteProjects Pro or imported a project from SuiteProjects Pro into Microsoft Project, but the task dates shown in the outline view in SuiteProjects Pro do not match the task dates in the Microsoft Project project plan.**

Answer: Project Connector takes into account the assigned users schedules in SuiteProjects Pro. If the users' schedules in SuiteProjects Pro 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 SuiteProjects Pro and Microsoft Project.

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

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

If conflicts are found, Project 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 SuiteProjects Pro 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 Project Connector?

Answer: The log file is named SuiteProjectsProProject.log and is in either of the following locations:

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

To view the log file from Microsoft Project, click SuiteProjects Pro in the Add-ins ribbon and select **About SuiteProjects Pro Project Connector**, then click **View Log File**.

Troubleshooting

The first step in troubleshooting is to ensure that you have installed the latest version of the Project Connector so that you have the most recent enhancements, fixes, and features. You should download new versions when they become available. Project Connector prompts you to download the latest version. Refer to [Installing a New Version](#) for more information.

If you are experiencing difficulties with Project Connector or would like to enable an optional feature for your SuiteProjects Pro 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 Project Connector log file (compressed as a ZIP file) when creating a support case.

To view the log file from Microsoft Project, click SuiteProjects Pro in the Add-ins ribbon and select **About SuiteProjects Pro Project Connector**, then click **View Log File**.

Creating a Support Case

If you are experiencing difficulties with SuiteProjects Pro or would like to enable an optional feature, go to SuiteAnswers through the Support page in SuiteProjects Pro 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 SuiteProjects Pro account.
2. Go to the user menu in the SuiteProjects Pro application. To access the user menu, click your profile pictures or initials in the upper-right corner.
3. Select **Support**.
4. Click **Explore SuiteAnswers**
5. In SuiteAnswers, click **Contact Support** in the top bar.
6. Click **Create Support Case** under Online Support.



Note: Depending on your support services subscription level, you may be able to access Support by phone. In this case, the page lets you select your country and shows a phone number that you can use to access Support by phone. The page also shows your SuiteProjects Pro account ID and your support services subscription level.

The page also includes a link to the SuiteProjects Pro user group. Click **Ask an Expert from the SuiteProjects Pro Support Community** to go to the SuiteProjects Pro user group.

The Create a Support Case page appears.

7. Follow the onscreen instructions to create a Support case:
 - a. Step 1 – Enter a search term to check for existing answers to your query.
The first 5 search results appear. The list shows the number of articles matching your search. Oftentimes, an answer to your query already exists in SuiteAnswers. Review the search results and click **View all search results** to view other search results.
 - b. Step 2 – Click and select the type of case you want to create.
 - c. Step 3 – Choose a case severity. For more information about case severity levels, see the help topic [Case Severity Definitions](#).



Important: Always use the appropriate case severity when submitting a case. Using the appropriate case severity helps SuiteProjects Pro Support prioritize between cases. Otherwise, SuiteProjects Pro Support need to evaluate the true urgency of each case, which slows down the response time to all cases.

- d. Step 4 – Click and select the feature that your query relates to. Click the caret to expand options under each categories in the list. If you want to change the option selected, you need to delete the text first before you can select a different option.

- e. Step 5 – Enter your question or a description of the problem you encountered.
 - f. (Optional) Attach files. Either click and select the files you want to attach or drag the files to the form.
 - g. Enter or verify your email address.
 - h. (Optional) Enter or verify your telephone number, including the country code and without any spaces, if you prefer to be contacted by telephone.
- Do not enter anything into the “Attach Document” field.
 - In the “Email” field, type your email.

Note: Requests to enable or disable account-wide features in SuiteProjects Pro can only be processed when an administrator’s email address is entered in this field.

- In the “Phone (Optional)” field, type a phone number where you can be contacted if you would prefer contacts you by telephone. Please include your country code and enter the number without any spaces.

Note: If you are creating a support case to enable an optional feature controlled by SuiteProjects Pro Support, enter the following details:

- In **Step 2. Click here to select the type of case you'd like to create**, select “Ask a question”.
- In **Step 3. Select a case severity**, select “C3 — How To / Non Urgent questions”.
- In **Step 4. Which Feature does it relate to?**, select “Switch Activation/Deactivation Requests” under the category “SuiteProjects Pro Web Application”.
- In **Step 5. Provide a short summary of your problem/question**, enter the name of the optional feature you want to enable or disable, the type of account (production or sandbox) and the Company ID for the account you want to enable or disable it for.

8. Click **Submit case**.

An email confirmation with your support case reference (SuiteProjects Pro Customer Care #) is sent to your email address.

SuiteProjects Pro Support will contact you to request additional information if necessary or guide you through any steps required to resolve the support case.

Create a Support Case

Step 1. Please enter a search term to check for existing help topics

Attachment drag and drop

Required

▼ **137 Search Result for Your Issue**

- Attachment File Drag and Drop**
Optional Features
- Attachment Viewer and Attachment Thumbnail**
If the Attachment File Drag and Drop optional feature is enabled for your account, SuiteProjects Pro shows the thumbnail images in the attachments drag and drop section on the project, expense report, and receipt properties forms.
- Global**
"Assigned to" Column Filter in Task List
- Release History**
Updated
- Unable to Drag and Drop Bookings in the Resource Planner**
Product.

[View All Search Results](#)

Step 2. Click here to select the type of case you'd like to create

Ask a Question

Required

Step 3. Select a Case Severity

C1 - Critical / Business Down

C2 - Urgent

C3 - How-to / Non-urgent Questions

C4 - Enhancement / Non-tech Support

Show/Hide case severity descriptions

Required

Step 4. Which Feature does it relate to?

Switch Activation/Deactivation Requests

Required

Step 5. Provide a short summary of your problem/question

Please enable the Attachment File Drag and Drop feature on our account (123456 CompanyID).

Required

Attach Files

Select a file or drag it here (max. 10MB)

+

Email address

marc@example.com

Required

Enter Contact Number (inc. country code)

[Submit Case](#)

Please do not include any sensitive information in this form or in any subsequent case communication.