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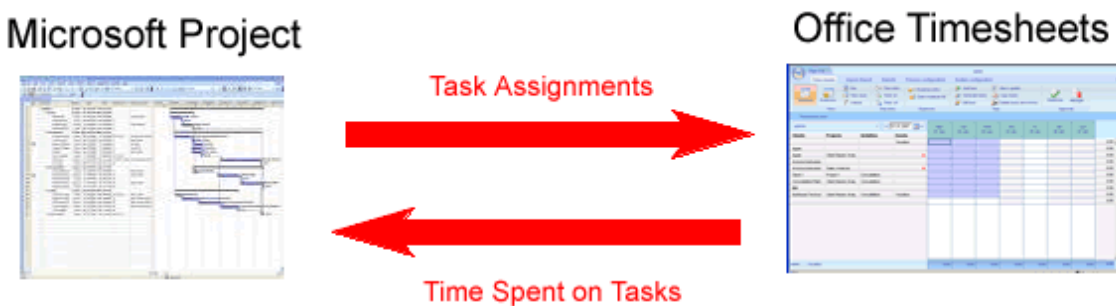
Using the Microsoft Project Link

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Microsoft Project Integration Overview

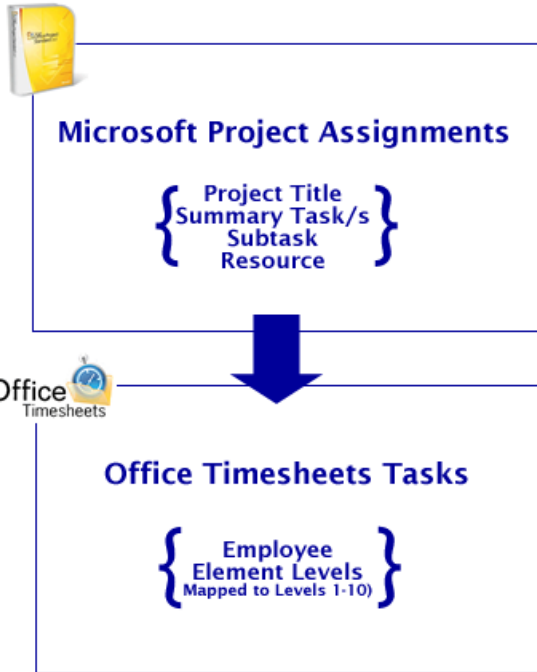
Office Timesheets includes direct two-way integration with Microsoft Project. In summary, Office Timesheet will allow a user to import tasks stored in a Microsoft Project file, populate user's timesheets with their task assignments, and export time spent on these tasks back into the project file to update the project plan with "actuals" (time spent).



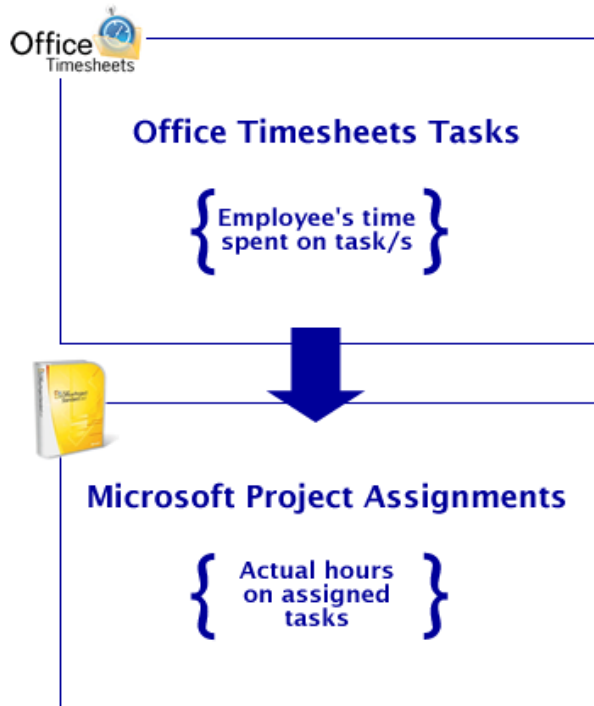
This function (Microsoft Project integration) will allow customers to use best-in-class applications for managing projects: Office Timesheets for time and expense tracking and analysis; and Microsoft Project for project planning scheduling.

Overview: How data is transferred between Office Timesheets and Microsoft Project

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



Time is then recorded by the employee against those tasks, and is then sent back to the Microsoft Project file to update the assignments with Actual Work data recorded from Office Timesheets.

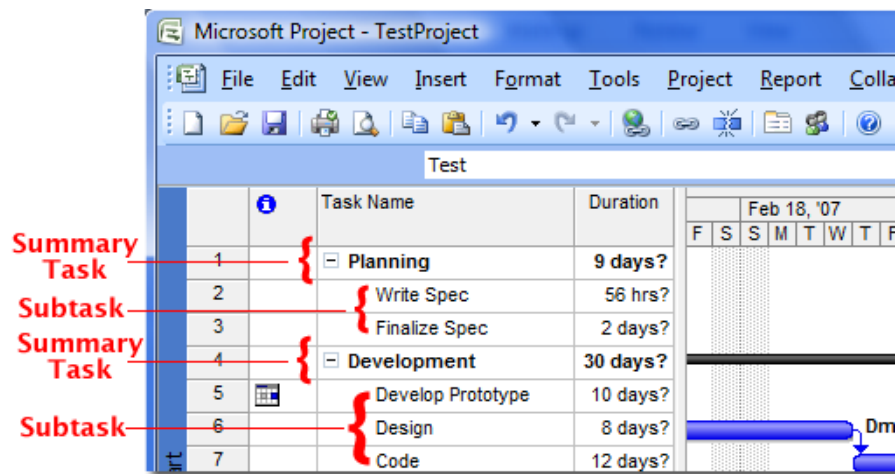


How data is transferred from Microsoft Project to Office Timesheets

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

Understanding Microsoft Project Task Hierarchy

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



Each indent level in the task outline is referred to by Microsoft Project as a “Component Level”. To simplify this concept, we refer to each indent level simply as Indent 1, Indent 2, Indent 3, and so on.

Understanding Office Timesheets' Task Hierarchy

Office Timesheets uses a similar type of hierarchical relationship for structuring tasks called Element Levels. However, the element hierarchy within Office Timesheets is not freeform as it is in Microsoft Project. Office Timesheets' task hierarchy is defined by its Element Level structure, which can include a total of 12 tracking levels. The Office Timesheets administrator is responsible for defining the number of levels in which will be tracked, each level's name, and the hierarchy (or order) of those Elements Levels.

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

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

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

Office Timesheets	Microsoft Project
Client/Cost Center	No Mapping
Project/Job	Project
Phase	Indent 1
Sub-Task/Activity	Indent 2
Level 5	No Mapping
Level 6	No Mapping
Level 7	No Mapping
Level 8	No Mapping
Level 9	No Mapping
Level 10	No Mapping

In fact, you can have two or more project files with different task hierarchies and still map them properly to Office Timesheets as templates can be created to map each Microsoft Project file separately.

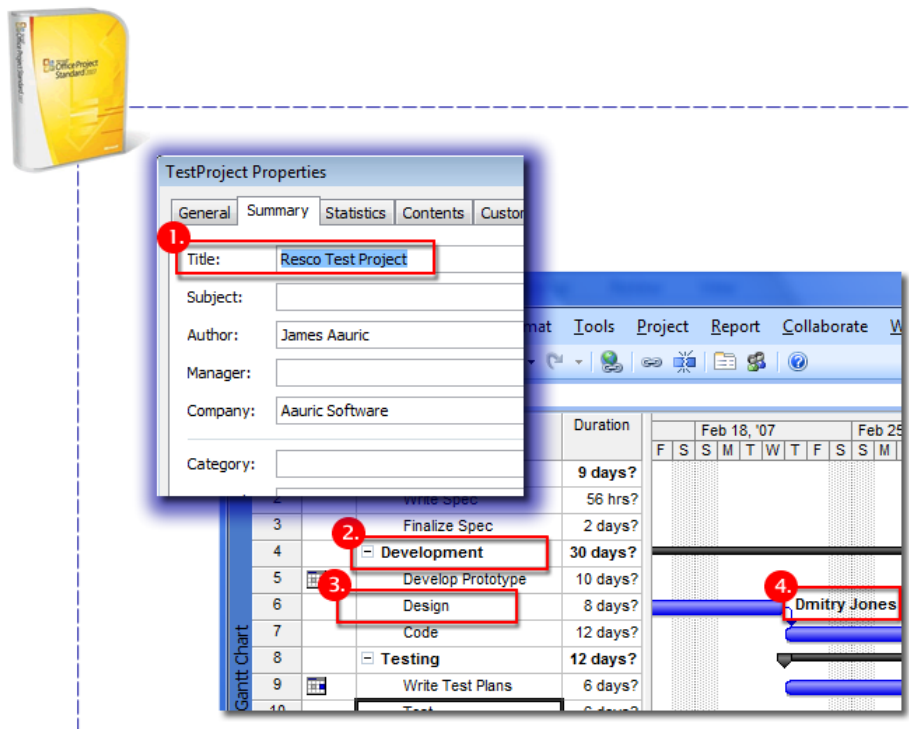
Based on the mapping shown in the previous screenshots, task data from the specified Microsoft Project file will link up the following way:

<u>Microsoft Project</u>	<u>Office Timesheets</u>
	Client*
Project Name	Project
Indent 1	Phase
Indent 2	Activity

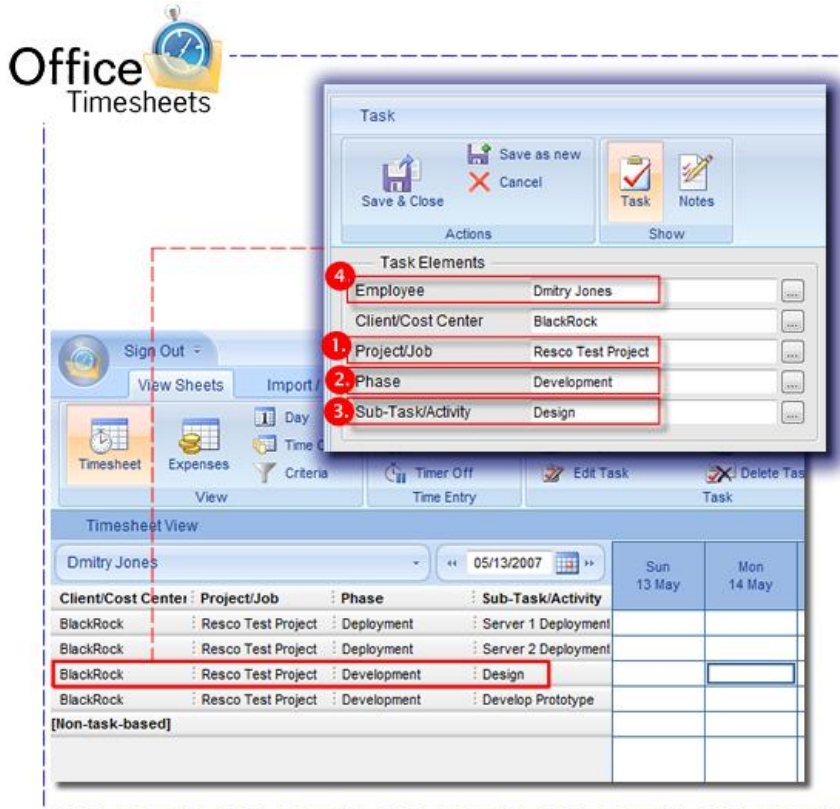
*You can choose not map any data to a particular level with Office Timesheets by choosing the option “No Mapping”. This is explained in more detail in the section “Using the Microsoft Project Link”.

The image below visually depicts how data, based on your mapping preferences, is extracted from Microsoft Project to create a task on any employee’s timesheet within Office Timesheets...

Data from Microsoft Project...



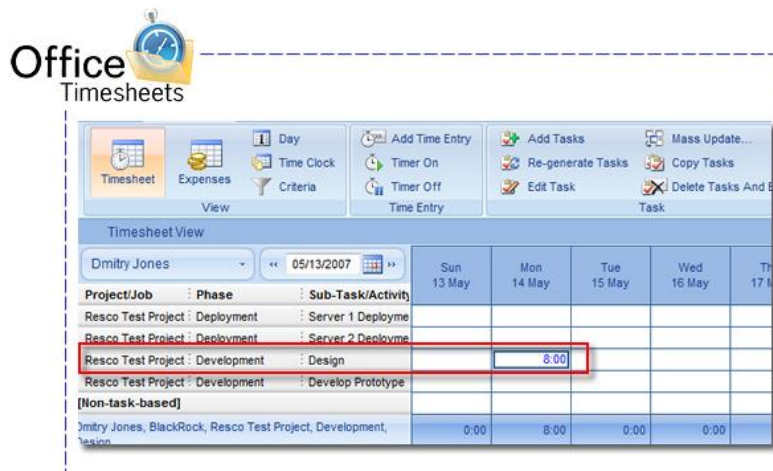
To Office Timesheets...



How data is transferred back to Microsoft Project from Office Timesheets

When an employee (resource) has entered time against task assignments in Microsoft Project that appear in their timesheet, Office Timesheets can send this data back to Microsoft Project to update your project file with actual hours. This allows the project management team to see the actual progress of their project plan and compare it with the original schedule. Office Timesheets can send actual hours data back to your project file as often and as many times as you wish.

The employee enters time in Office Timesheets against the assigned task from Microsoft project...



The employee's time entries update the task's Actual Work field in Microsoft Project...



The screenshot shows the Microsoft Project software interface with a task list table. The table has columns for Task Name, Resource Names, Start, Finish, Duration, Actual Duration, Work, Actual Work, and % Complete. The 'Actual Work' column for the 'Design' task is highlighted in red.

	Task Name	Resource Names	Start	Finish	Duration	Actual Duration	Work	Actual Work	% Co
4	Development		Mon 1/29/07	Fri 3/9/07	30 days?	1 day	240 hrs	8 hrs	
5	Develop Prototype	Dmitry Jones	Mon 1/29/07	Fri 2/9/07	10 days?	0 days	80 hrs	8 hrs	
6	Design	Dmitry Jones	Mon 2/12/07	Wed 2/21/07	8 days?	1 day	64 hrs	8 hrs	
7	Code	Roman Thompson	Thu 2/22/07	Fri 3/9/07	12 days?	0 days	96 hrs	0 hrs	
8	Testing		Thu 3/23/07	Fri 3/30/07	42 days?	0 days	96 hrs	0 hrs	

Using the Office Timesheets Microsoft Project Link

There are essentially 5 quick steps to initially importing and exporting your data between Office Timesheets and each of your Microsoft Project files. These steps include:

1. Creating an XML data exchange file from your Microsoft Project file.
2. Creating a Microsoft Project Import/Export template for your Microsoft Project file in Office Timesheets.
3. Importing your Project file into Office Timesheets using your corresponding Import/Export template.
4. Exporting data out of Office Timesheets to update your project file using your corresponding Import/Export template.
5. Append and/or merging your Project file with the updated XML data exchange file from Office Timesheets.

Once you have completed steps 1 & 2 for a particular Project file, only step 3, 4, 5 are required for each Import/Export update thereafter. While this may sound like a lot of work, steps 3, 4, and 5, which are required for periodic updates between your project file and Office Timesheets, only take a few seconds each to complete.

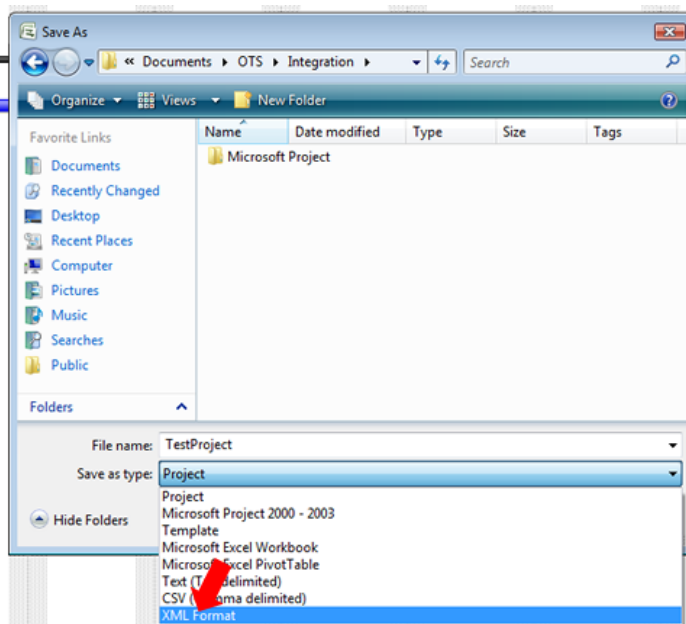
Step by step instructions for each of these 5 steps are listed below...

Step 1: Creating an XML data interchange file from your Microsoft Project file

While there are several methods of integrating applications and data with Microsoft Project, Office Timesheets' Project link uses Microsoft Project's XML data interchange. The Microsoft Project XML data interchange system is preferred because it works across all Microsoft Project platforms (Standard, Professional, Project Server, etc.). The Microsoft Project XML format also offers a number of other advantages over other integration methods according to Microsoft® Corporation such as a much smaller file framework for faster transfer of data, tighter security for transfer of data across the Internet, and more.

To save a project file as XML using Project Professional

1. In Microsoft Project, open the project file you wish to export to Office Timesheets.
2. From the **File** menu, click **Save As**.
3. In the **Save As** dialog box, click the **Save as type** drop down, and select **XML format**, and click **Save**.



Note: Working in Project Server Environment?

If you are working with Project Professional 2007 in a Project Server please refer to the topic "[Creating an XML data interchange file from your Microsoft Project file from a Project Server Environment](#)" for proper instructions and notes.

Step 2: Create Project Import/Export Template

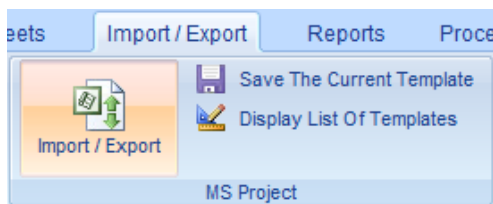
A template is made within Office Timesheets for each Project file you wish to import into Office Timesheets. Each template contains data configuration (mapping) and options for which you wish to adhere to when importing/exporting data between Office Timesheet and the specified Project file.

Once a template is created for a Microsoft Project file; the template, along with your configuration settings, are saved. This allows you to quickly and easily re-open the template for future importing and exporting of data between Office Timesheets and Microsoft Project for the specified Project file.

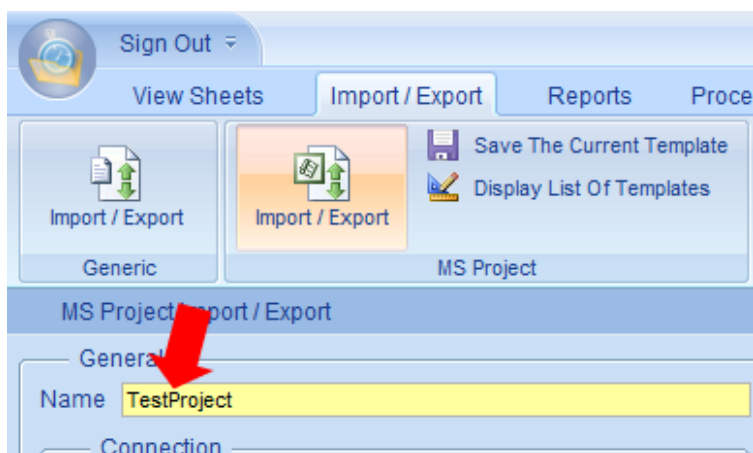
This is the file in which Office Timesheets will access when importing task assignments, and export actual hours data back into the Microsoft Project file.

To create a Project Import/Export template

1. In Office Timesheets, click on the Import/Export.
2. From within the Import/Export tab, click on the Import/Export icon in the Microsoft Project ribbon group.



3. From the General form group, type in the name of your project file. This must be the exact name of the XML file in which you saved. For example, if you saved your file as TestProject.xml you would type in **TestProject** in the name field (see illustration below).



4. In the Options form group, click on Adhere to Project Plan's Task Constraints and/or the Adhere to Project Plan's Task Dependencies checkbox/es if wish you use these options.

 **Note:**

Adhere to Project Plan's Task Constraints – choose this option if you wish to apply the task constraints set within your Project file with the task you import into Office Timesheets.

When you set a start or finish date for a task in Project, this means that you do not want that task to start or finish any earlier than that date. Constraints are applied to your tasks to impose restrictions on the way that the task's start and finish dates are calculated.

Office Timesheets can apply these constraints to imported task by setting the task's start and end date so that they are only shown on the employee's timesheet during the start and end date period. When the employee views the timesheet outside of this start and end date range the task will not appear on the timesheet, and thus time cannot be entered for the task outside of the start and end date.

If this option is not selected, Office Timesheets will ignore the Project file's task constraints and the tasks will appear on the employee's timesheet throughout all dates.

Adhere to Project Plan's Task Dependencies – choose this option if a task's start date is dependent on the start and/or finish of another task within your Project file, and you wish to adhere to these dependencies within Office Timesheets upon importing the Project file.

If this option is selected, Office Timesheets will not import those tasks that have dependencies and or not set to start. However, if this option is not selected, Office Timesheet will import the Project file's task regardless of their status with regards to task dependencies.

5. From the **Mapping** form group, map your project file's hierarchical structure to your Office Timesheets task element structure by selecting a Microsoft Project level (or field) to match up with your Office Timesheets' element levels.

 **Note: Mapping**

Office Timesheets' Project Link offers a great deal of flexibility with its built-in field mapping. Because your Office Timesheets' task tracking hierarchy is fully customizable and many people organize Microsoft Project plans differently the mapping feature allows you configure both systems as they were originally intended.

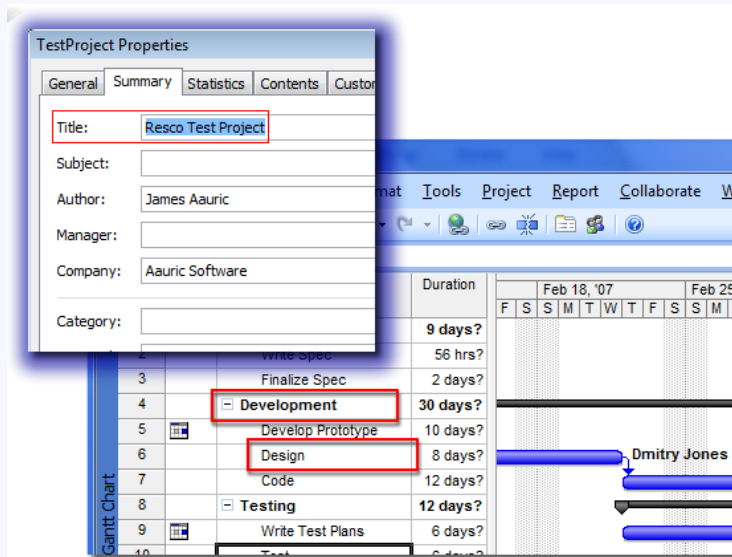
To map your Project file's structure to Office Timesheets' simply match the corresponding Project level/field with each of your Office Timesheets element levels. When mapping to an Office Timesheets element level from Project you have the following options:

- **Project** – if your Project file only contains one (1) project plan, then use this selection to map your Microsoft Project plan's name (Title) to the Element Level in Office Timesheets that stores Project and/or Job names. If your Project Plan contains multiple Projects then each project name is likely to be store and Project's highest Summary Task level (Indent 1) and you would need to map accordingly (thus, you would not use the "Project"

selection, but rather the "Indent 1" selection.

- **Indent (1 – 9)** – relates to your Project files task hierarchy start with the highest summary level (1) to the lowest sub-task level (2-9).
- **No Mapping** – choose this selection for an Office Timesheets element level if there is no corresponding equivalent in your Project file's task hierarchy. When you choose the No Mapping selection you have the option setting an element item for the Non-Mapped level.

In the example below we have Project plan that is broken down into a simple, but common task hierarchy for Project with phase as a summary task at the highest indent level (1) and a subtask at the lowest indent level (2). The name of the project plan for this particular Project file is stored in the **Title** field in the Project plan's **Properties (File | Properties)**.



Our task element hierarchy within Office Timesheets is as follows:

Level 1 = Client/Cost Center

Level 2 = Project/Job

Level 3 = Phase

Level 4 = Activity

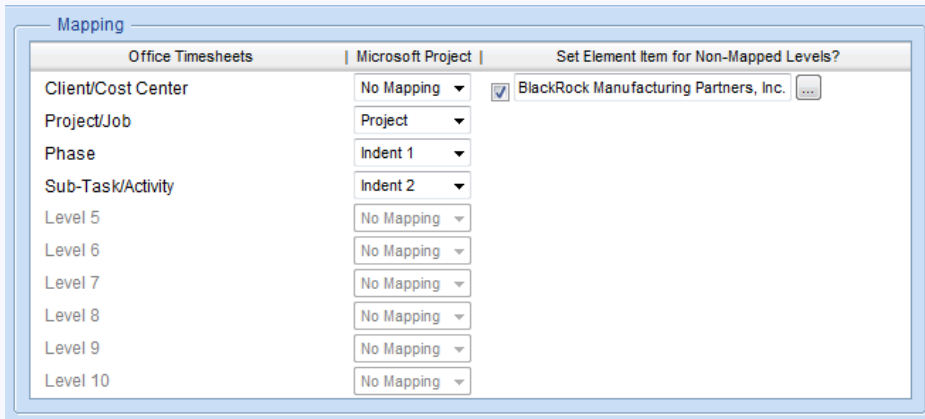
Starting with our first Element level, **Client Cost Center**, we have not corresponding field within our project plan. Therefore, we select No Mapping for this particular field within Office Timesheets. However, we do know that this project applies to a particular client that is stored within our Office Timesheets' database; so we select the checkbox and choose the client name "BlackRock Manufacturing Partners, Inc." under the **Set Element Item for Non-Mapped Levels?** column (refer to screenshot below).

Next, we select **Project** to correspond with the **Project/Job** element level within Office Timesheets (see screenshot below). This gets the project name from the Project file's **Project Properties** dialog **Title** field.

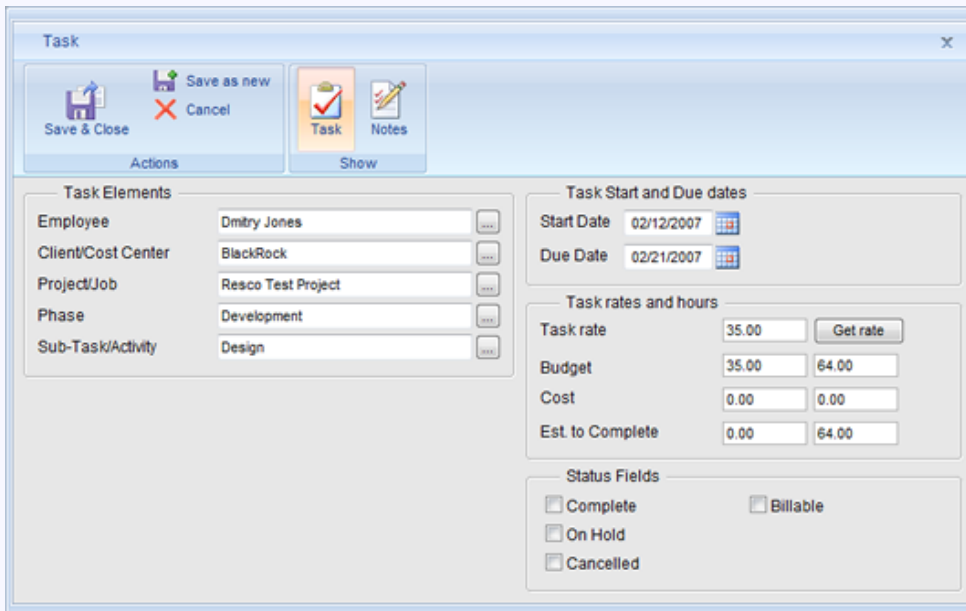
Next, we select **Indent 1** to correspond with the Phase element level within Office Timesheets (see screenshot below).

Finally, we select **Indent 2** to correspond with the **Sub-Task/Activity** level within Office Timesheets

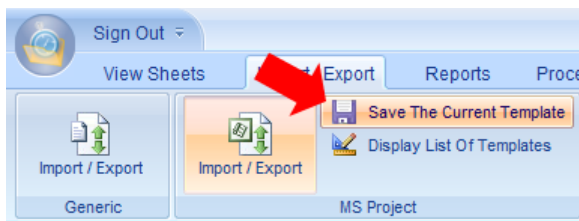
(see screenshot below).



The sample task (shown in screenshots above) when using the example mapping (shown in screenshot above) will appear in Office Timesheets as follows...

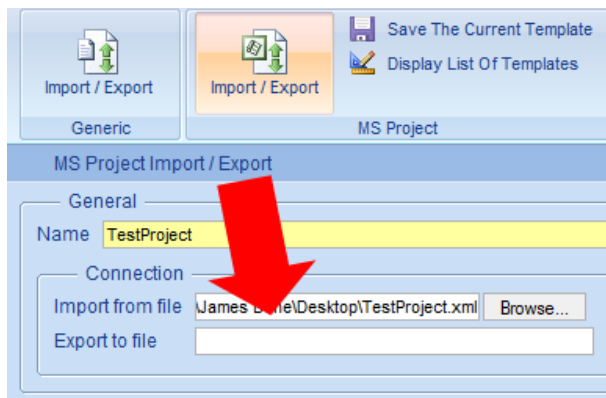


6. Finally, save your Project Import/Export template by clicking the **Save The Current Template** icon in the **MS Project** ribbon group...

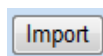


Step 3: Import your Project File

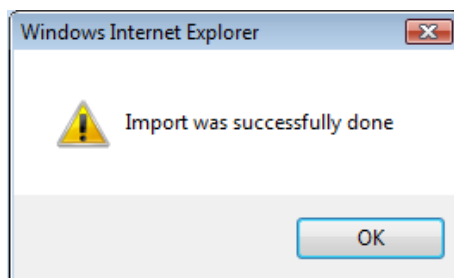
1. In Office Timesheets, click on the **Import/Export** tab.
2. From within the **Import/Export** tab, click on the **Import/Export** icon in the **MS Project** ribbon group.
3. From the **MS Project** ribbon group, click on the **Display List of Templates** icon;
4. From the **Import/Export Templates List** dialog box, select the template that corresponds with the **Project** file that you wish to import, and click **Load**.
5. Click the Browse button next to the Import field in the **Connection** form group; select the XML interchange file that you created earlier from Microsoft Project (see example in screenshot below).



6. Click the Import button...



A dialog will appear to notify of a successful import; click **OK**.



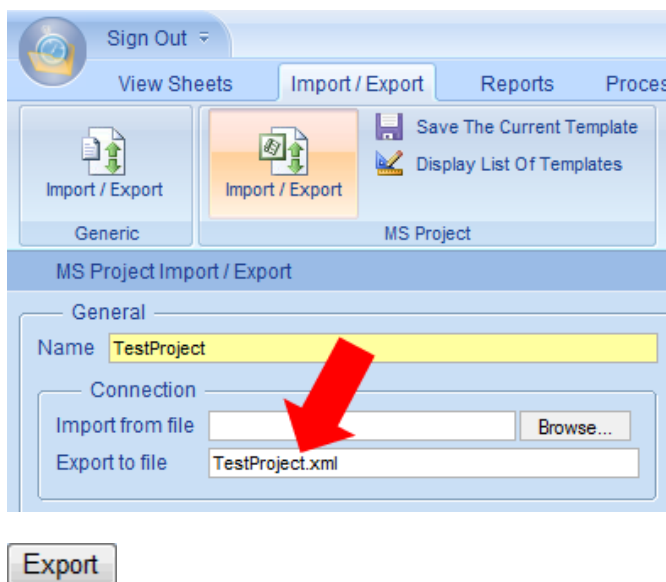
Step 4: Export Actual Hours Data from Office Timesheets back to your Project Plan

Once employees have entered time against their task assignment in Office Timesheets (that were imported from Microsoft Project) you can import them back into Microsoft Project at any time, and as many times as you wish.

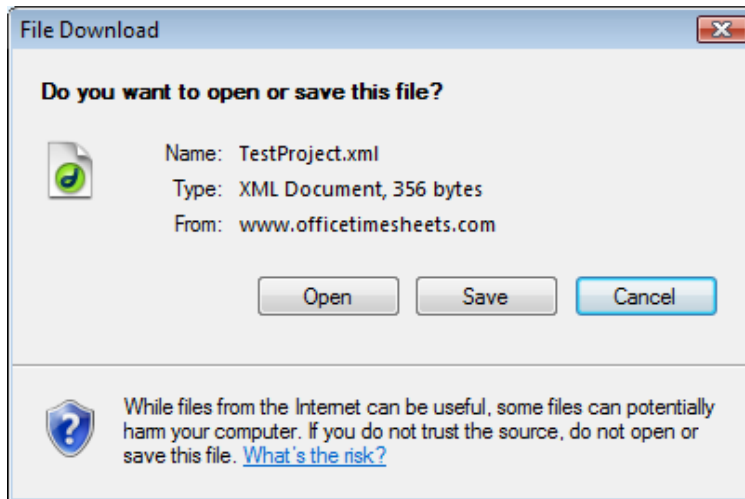
To import actual hours data from Office Timesheets back to your project follow the steps A & B below..

To export the project file's actual hour data from Office Timesheets...

1. In Office Timesheets, click on the **Import/Export** tab.
2. From within the **Import/Export** tab, click on the **Import/Export** icon in the **MS Project** ribbon group.
3. From the **MS Project** ribbon group, click on the **Display List of Templates** icon;
4. From the **Import/Export Templates List** dialog box, select the template that corresponds with the **Project** file that you wish to import, and click **Load**.
5. Under the **Connection** form group, type in the name of the file you wish to create to update your corresponding Project file followed by **.xml** in the **Export to file** field, and click **Export...**



6. From the File Download dialog box, click the Save button and save the file.



7. From the **Download Complete** dialog box, click **Close**.

Step 5: Append your Project file with the updated XML data exchange file from Office Timesheets

1. Open the Microsoft Project plan wish to update from Office Timesheets in its native file format.
2. Next, from Microsoft Project, on the **File** menu, click **Open**. In the **Open** dialog box, select an option in the **Look in:** pane that is displayed on the left of the **Open** dialog box (for example, **My Documents**), and browse to the location of the XML file you want to open.

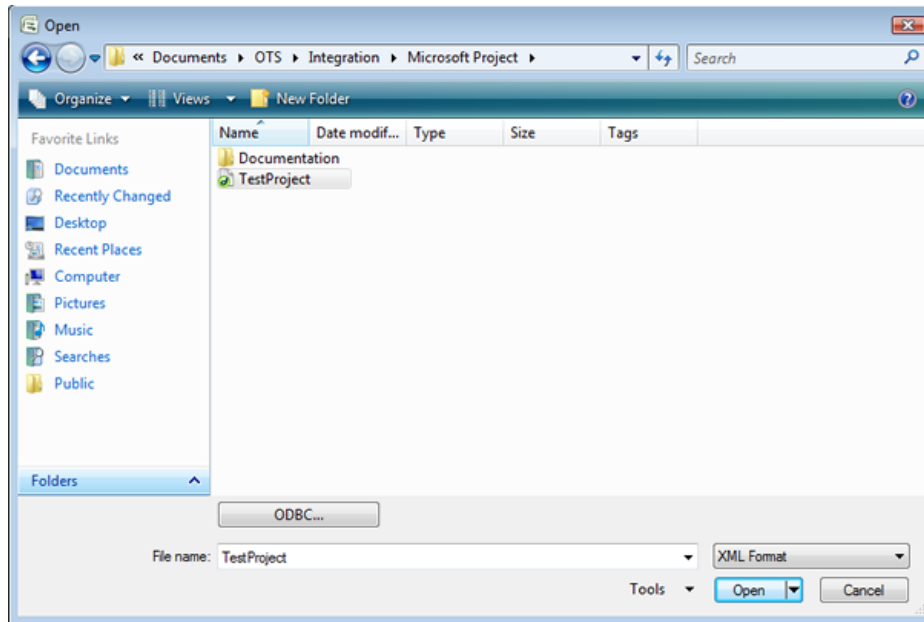
 **Note:**

You must manually select **XML Format (*.xml)** or **All Files (*.*)** in the **Files of type** list to display XML files in the **Open** dialog box. Figure 3 shows the Open dialog box in Project Professional.



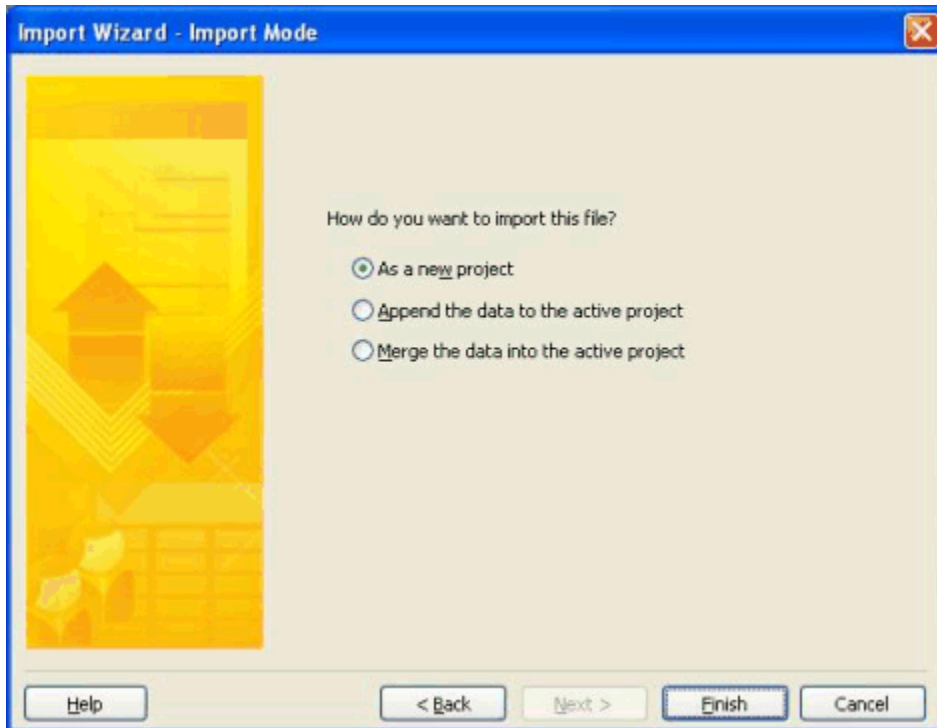
3. Select the XML file you want to open, and click the **Open** button. You can also simply double-click the XML file.

Figure 3. Open Dialog Box



4. The **Import Wizard** starts (Figure 4).

Figure 4. Import Wizard



Select how you want to import the XML file, and then click **Finish**:

- **As a new project** Creates a new project from the XML file.
- **Append the data to the active project** Appends the project data in the XML file to the existing project that is currently active in Project Professional.

When Project 2007 appends XML data to an existing project, the unique ID of the appended summary task is incremented from 0 to the next available integer. For example, if the project to which you are appending XML data has three tasks with the unique IDs 1, 2, and 3, the appended summary task is given the unique ID of 4. Project then increments the unique IDs of all tasks in the appended project. Using the same example, tasks 1 and 2 of the appended project are assigned the next available unique IDs, 5 and 6.

 **Note:**

This process can disassociate assignments, tasks, resources, and cross-project links from original data. To help ensure that data is not disassociated, separate this data into its smallest possible component: a task, a resource, an assignment, and so on, before appending.

- **Merge the data into the active project** Merges the project data in the XML file into the project that is currently active in Project Professional.

When Project 2007 merges XML data to an existing project, tasks in the project file that are currently active in Project Professional are overwritten by tasks in the XML file that share the same unique ID.

 **Note:**

Use caution when merging a XML data into an active project, as this process can result in data loss.

Details of data transfer between Microsoft Project and Office Timesheets

The information below details how data is transferred from Microsoft Project to Office Timesheets; and back from Office Timesheets to Microsoft Project.

Microsoft Project Assignments = Office Timesheets Tasks

The definition of task in Office Timesheets is slightly different than the definition of a task in Microsoft Project. A task in Office Timesheets is the combination of an employee + one (1) or more element items (Client, Project, Activity, etc.). Thus, within Office Timesheets, a task cannot exist without an employee.

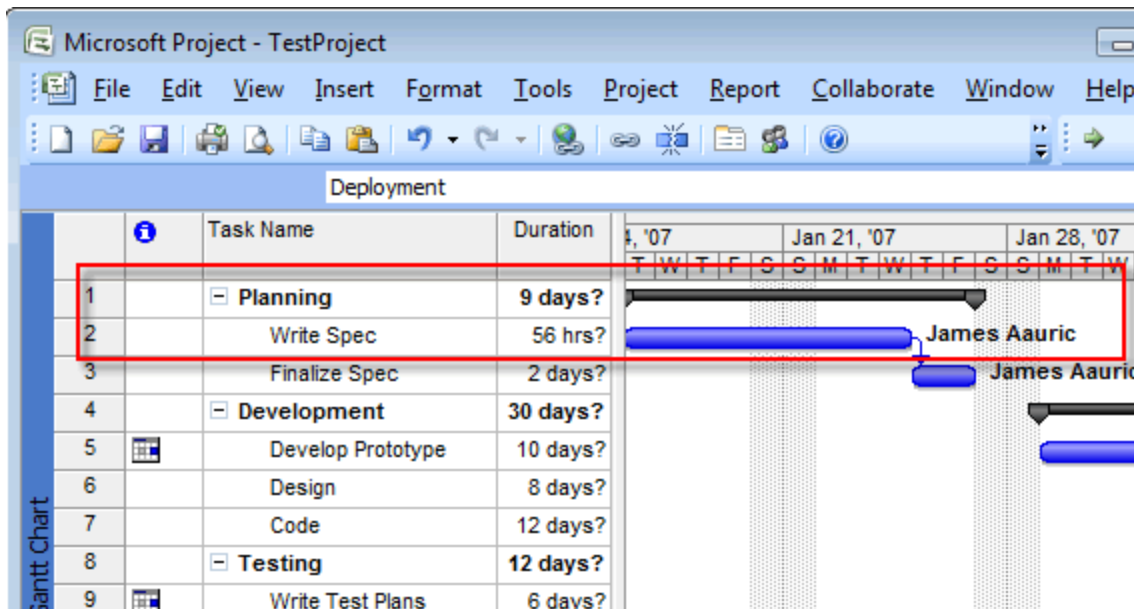
A task in Microsoft Project does not include a resource (employee). However, when one or more resources are assigned to a specified task within Microsoft Project, it becomes an “assignment” or “task assignment”.

Tasks, by themselves, within a Microsoft Project plan will not import into Office Timesheets. Only task assignments within a linked Microsoft Project plan are imported into Office Timesheets.

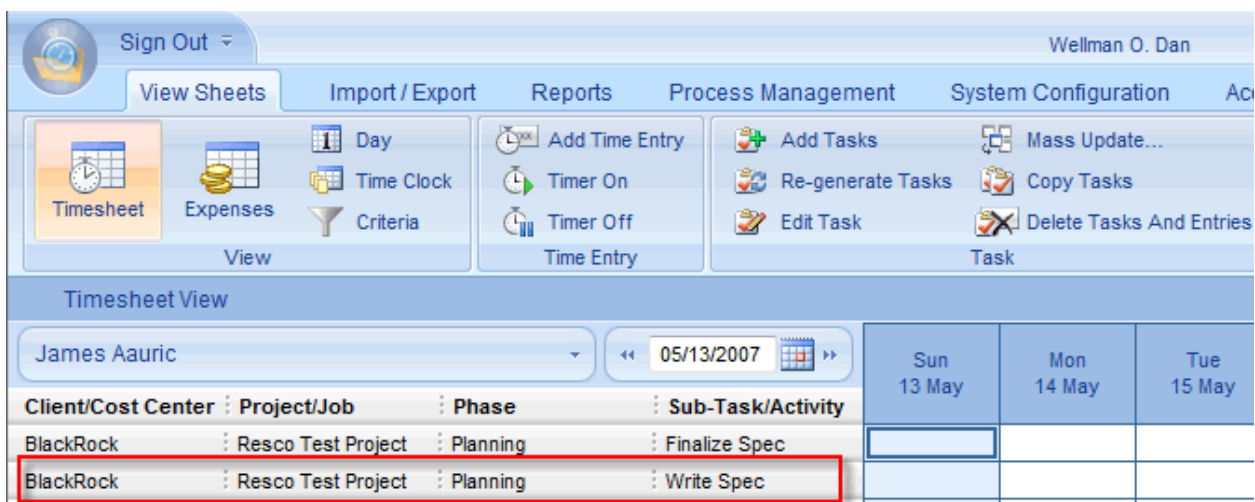
Imported Task Data from Microsoft Project

Several things happen when a task assignment from Microsoft Project is imported into Office Timesheets. The core records that are linked up between Microsoft Project and Office Timesheets are tasks. When Office Timesheets imports a task assignment from Microsoft Project, tasks from the Project file are created in the appropriate employee’s timesheet.

For example, a task in Microsoft Project may look like this:



And, when imported into Office Timesheets, the Employee might see the assigned task from the Project file like this...



When viewing the task's full details in the Task dialog box within Office Timesheets you'll also notice additional data that transfers from Microsoft Project such as:

- Start Date – the task's Start Date from Microsoft Project is imported into the task's **Start Date** field within Office Timesheets.
- End Date – the task's End Date from Microsoft Project is imported into the task's **End Date** field within Office Timesheets.
- Employee Rate – the Standard hourly rate of the Resource within Microsoft Project file is written to the **Task rate** field in Office Timesheets.
- Work – the amount of work to which the resource is assigned within Microsoft Project is written to the task's **Budget Hours** field in Office Timesheets.

- Estimate to Complete – or remaining duration of work the resource is assigned within Microsoft Project is written the task’s **Est. to Complete** field in Office Timesheets.

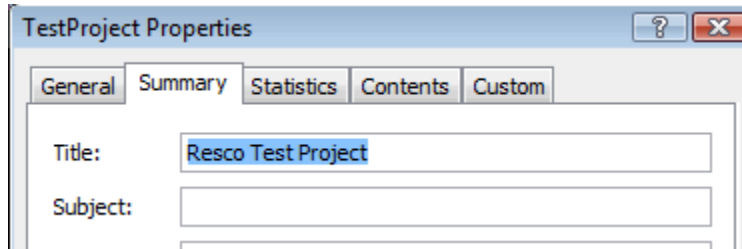
Element Items Created in Office Timesheets upon Import of a Project file

Each name at each component level (indent) for assigned tasks (assigned to a resource) in the Microsoft Project file is created as an Element Item within Office Timesheets at its mapped Element Level.

Project Name – if your Project file contains only one project (some Project files can contain multiple projects), then the way to map your Project name is to use “**Project**” selection (see illustration **A**). When using the **Project** selection in Office Timesheets’ Microsoft Project Import/Export mapping template editor, n Office Timesheets gets the project’s name from the **Title** field in the Microsoft Project file’s **Proprieties** (see illustration **B**).

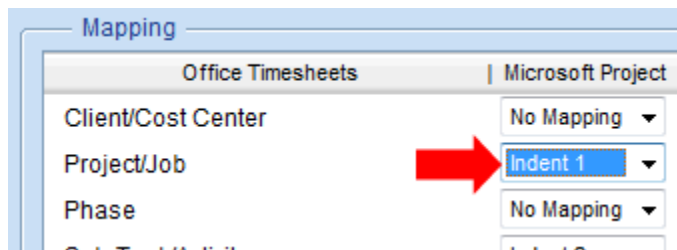
Illustration A

Illustration B

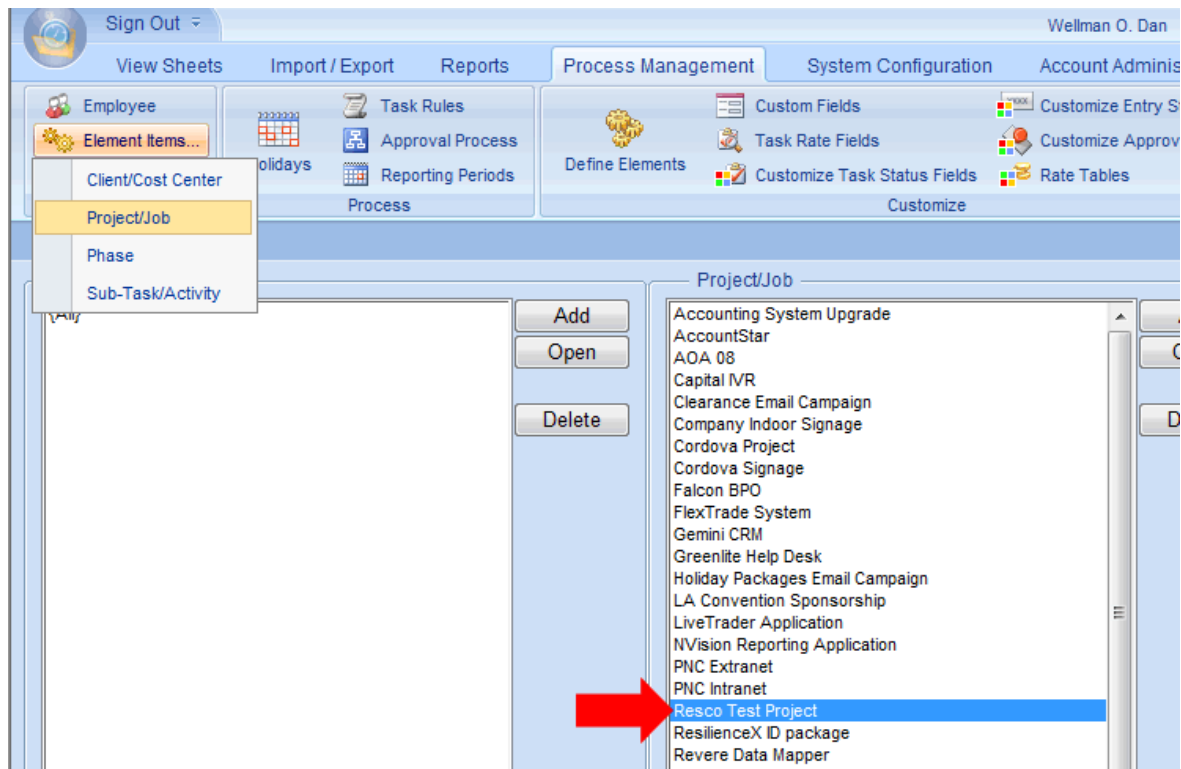


If your project file contains more than one project (multiple projects), each project name is stored at the first Indent Level within the Microsoft Project XML data interchange file. Thus, you would map the Component Level (Indent 1) to your Project level within Office Timesheets (see illustration C).

Illustration C

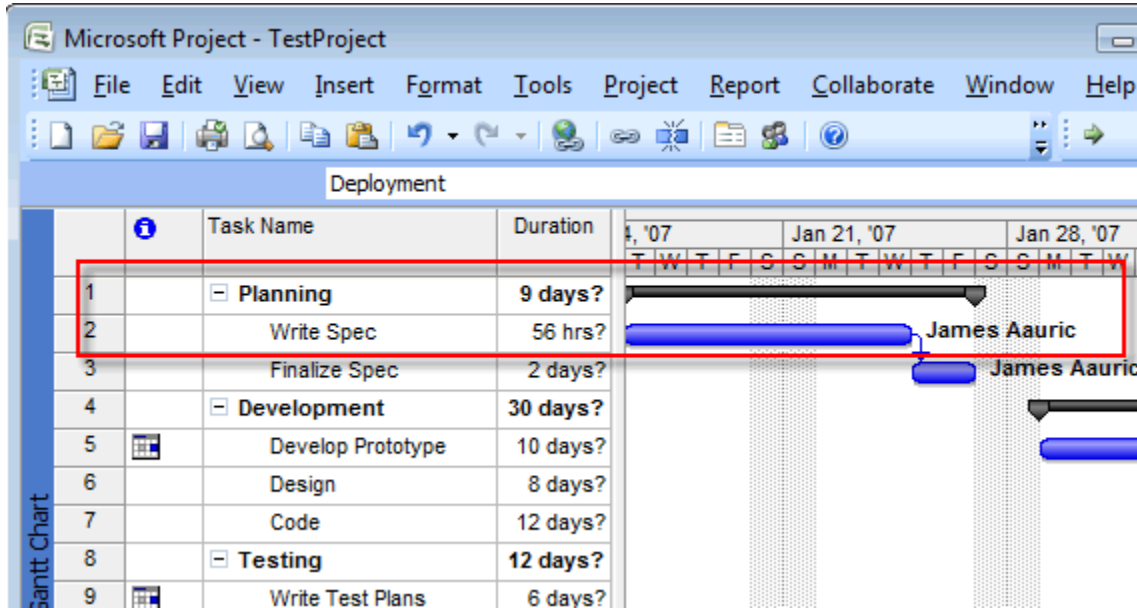


Thus, if you choose to map the project name to Office Timesheets upon import, and have the project name show in the employee's task list as a part of their task, you would map the project name to the corresponding element level in Office Timesheets in one of the two ways shown below. Upon importing a Microsoft Project file, each project name is created as an Element item within Office Timesheets at the Element Level in which you've mapped it to.

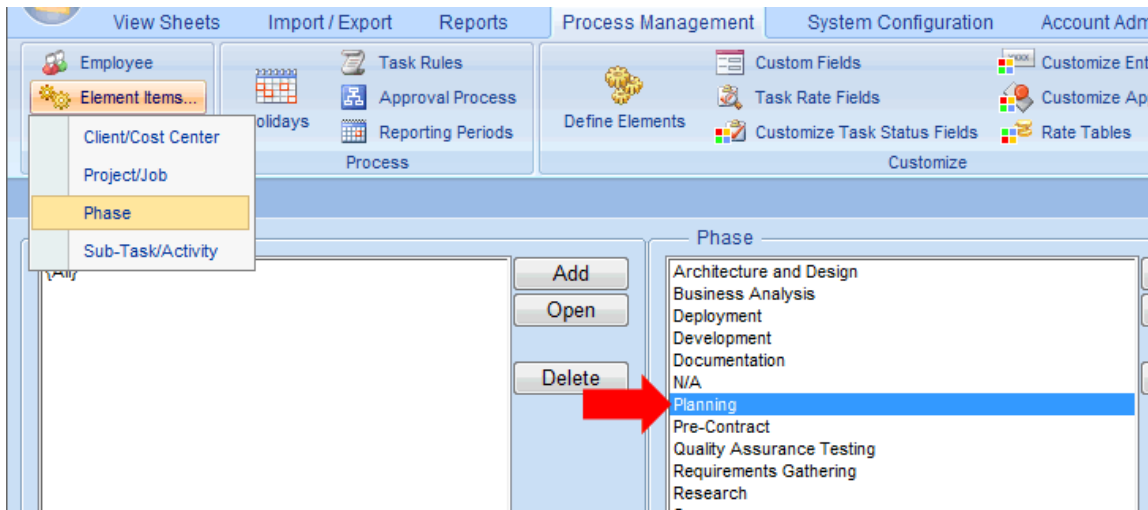


Microsoft Project Component Levels (Indents) – each name created at each Indent Level in your Microsoft Project file can be mapped to an Element Level within Office Timesheets. The names at each component level (Indent) within your Project file that is mapped to Office Timesheets will be written to the corresponding Office Timesheets Element Level Item List. For example, we've mapped the Microsoft Project file's first component level (Indent 1) to the third element level (Phase) within Office Timesheets and you can see that the name Planning has been added to the **Phase** Element Level Item List.

Microsoft Project: Indent 1 = Planning

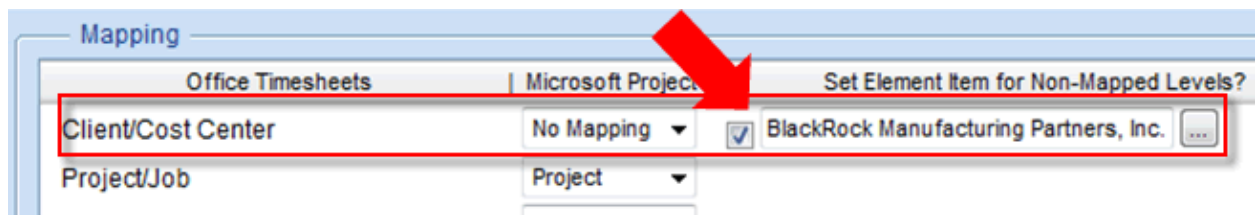


Office Timesheets: Creates Element Item (Planning) at mapped Element Level (Phase)

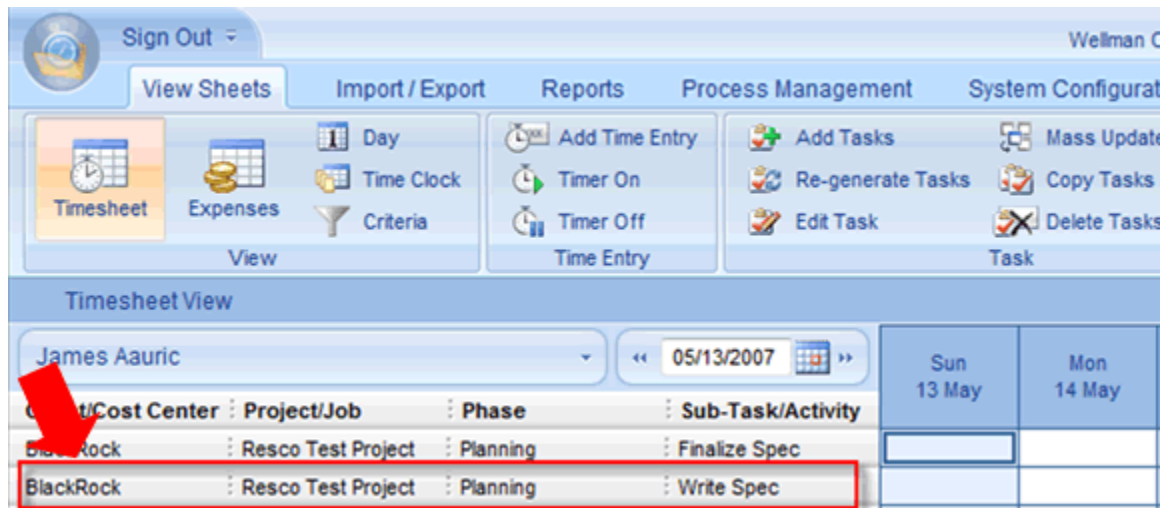


However, this only applies to Component Names of tasks within your Project file that are a part of task assignments. Those names within your project file that are a part of tasks that do not contain resource assignments will not be imported into Office Timesheets.

Non-Mapped Element Levels – when mapping your Microsoft Project file’s tasks hierarchy to your Office Timesheets task hierarchy you also have the option “No Mapping” for particular Office Timesheet Element Levels. When the option **No Mapping** is selected, a new option appears: “**Set Element Item for Non-Mapped Levels?**” If this option is selected, you can then choose to an element item at the selected element level to appear as part of the assigned tasks that imported to employee’s timesheets when importing a project file. For example, in the images below the Client/Cost Center level has no project file data mapped to it. However, the client “BlackRock Manufacturing Partners, Inc.” is selected in the Set Element Item for Non-Mapped Levels field...



When tasks from the Project file are imported into Office Timesheets they will show on the employee’s timesheet augmented with the selected client name...



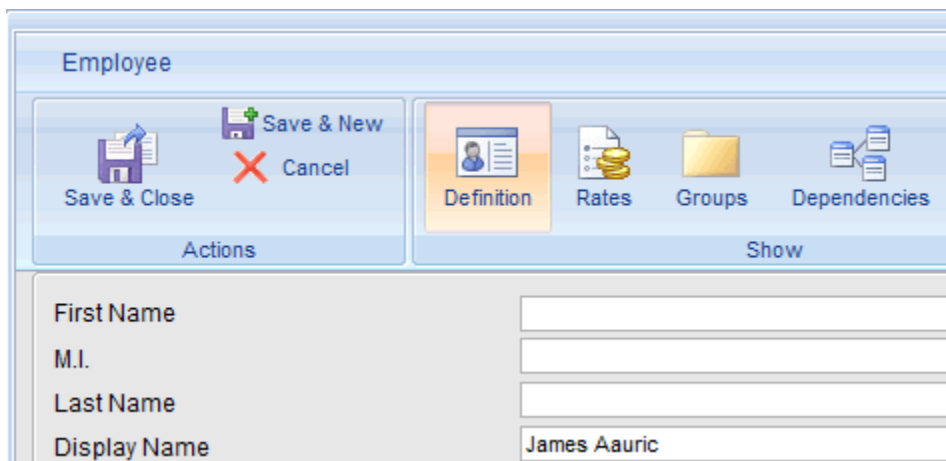
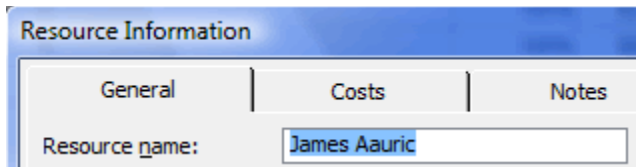
Resource Data

The equivalent of a task within Office Timesheets in Microsoft Project is a task assignment. When Office Timesheets and Microsoft Project are linked together, all task assignments within a Project file are imported into Office Timesheets. The first thing that happens upon import is the creation of Resources from Microsoft Project within Office Timesheets. For example, let’s say you have a Project file with 3 resources: John, Kelly, and Thomas. Upon import, Office Timesheets will add these three resource

names to its Employee item list if they do not already exist. If the resource name exists, the Microsoft Project link will ignore adding the resource as an employee in Office Timesheets.

Because Office Timesheets employee records contain different fields than a Microsoft Project Resource Information record, Office Timesheets simply looks to match up the most logical fields when querying Office Timesheets to see if there is an existing Employee record that matches a Resource within Microsoft Project, or in where a resource name from Microsoft Project is created inside of Office Timesheets. A good case in point is that within Microsoft Project the resource name is held within a single field. However, Office Timesheets includes four fields for holding employee name information: First Name, M.I., Last Name, and Display Name.

Because the Employee **Display Name** field is a single field, this is the field in which Office Timesheets' Microsoft Project link uses to determine if a resource from a Microsoft Project task assignment exists within Office Timesheets or not. If an employee's Display Name field within Office Timesheets does not match that of an existing resource within your Microsoft Project file, it will be created as a new employee within Office Timesheets. A new employee record will be created in Office Timesheets with the resource name as the Employee's Display Name. This new employee record will not contain any information within the First Name, M.I., and Last Name fields (**see the screenshots below for an illustration**).



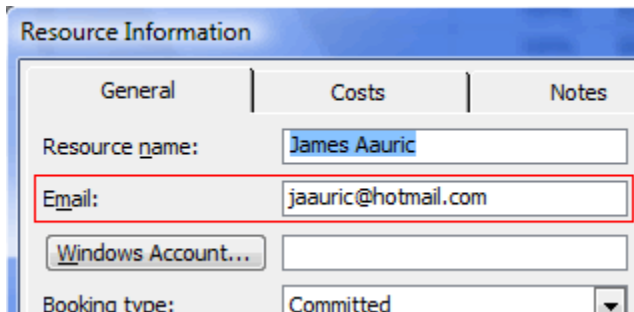
To make any further edits to the one of these types of records you must add a First Name and Last Name to the Employee record within Office Timesheets.

Other Employee Information that is transferred to Office Timesheets during import from Microsoft Project

Additional information from the Resource record is also written to Office Timesheets upon import from Microsoft Project. This data includes:

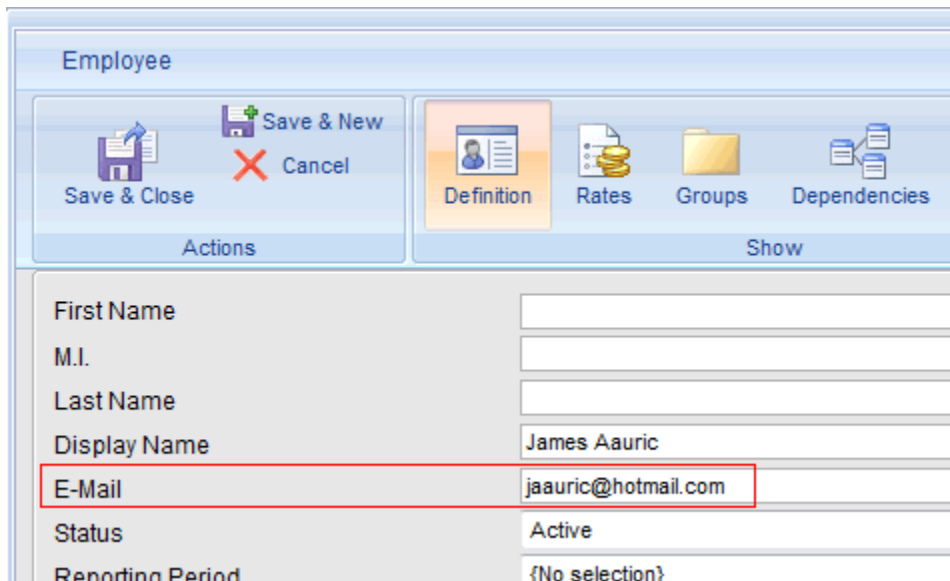
- **Email Address** – if the Resource record contains an email address it will be written to Office Timesheets from Microsoft Project upon import (see illustrations below).

Email address of Resource within Microsoft Project file...



The screenshot shows the 'Resource Information' dialog box with the 'General' tab active. The 'Email' field is highlighted with a red border and contains the text 'jaauric@hotmail.com'. Other fields include 'Resource name' (James Aauric), 'Windows Account...', and 'Booking type' (Committed).

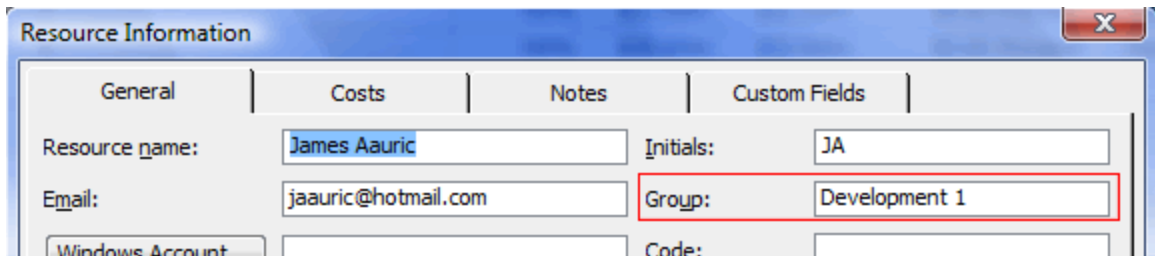
Written to Employee E-mail field in Office Timesheets...



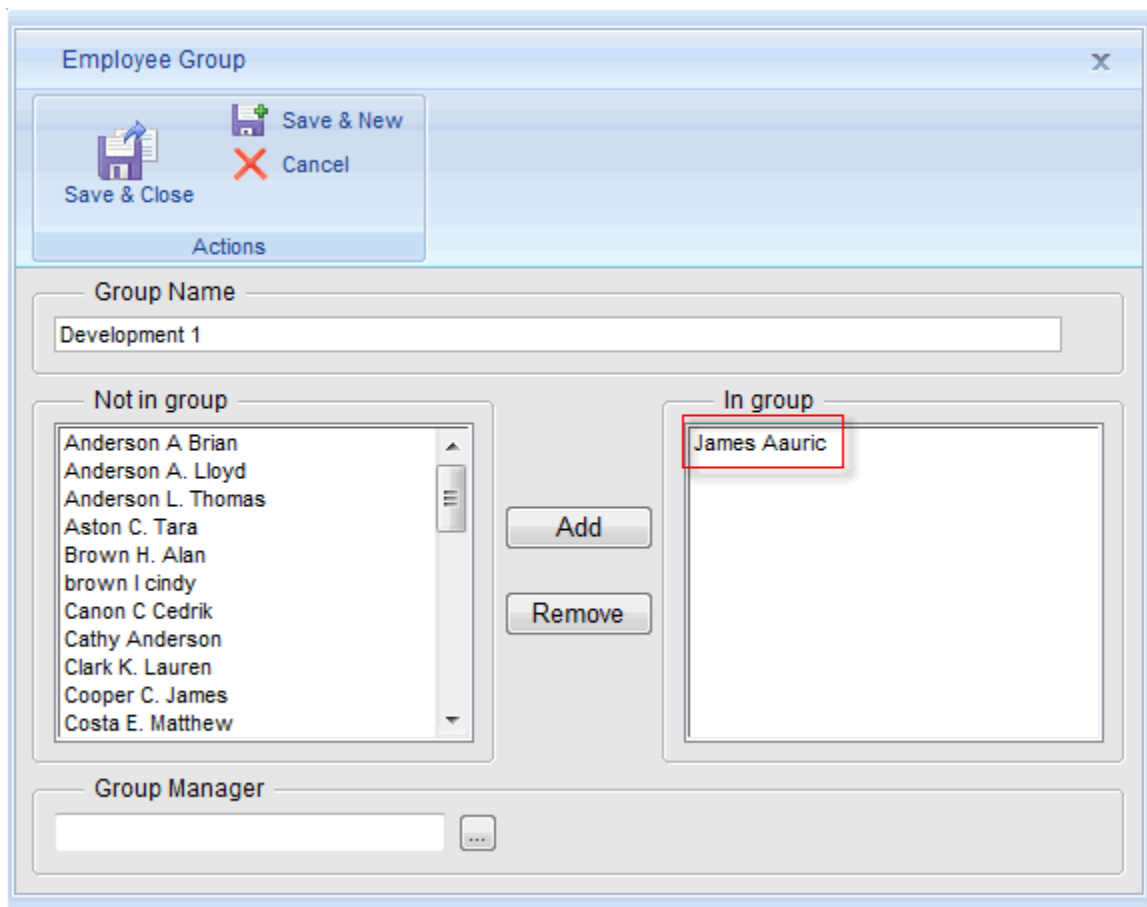
The screenshot shows the 'Employee' form in Office Timesheets. The 'E-Mail' field is highlighted with a red border and contains the text 'jaauric@hotmail.com'. Other fields include 'First Name', 'M.I.', 'Last Name', 'Display Name' (James Aauric), 'Status' (Active), and 'Reporting Period' ({No selection}).

- **Group** – if a resource is assigned to a Group within a Microsoft Project file, the name of the Group will be imported into Office Timesheets as an Employee Group if it does not already exist; and the Employee will be assigned to that Employee Group.

Group assignment of resource within Microsoft Project...



Group assignment of Employee within Office Timesheets...



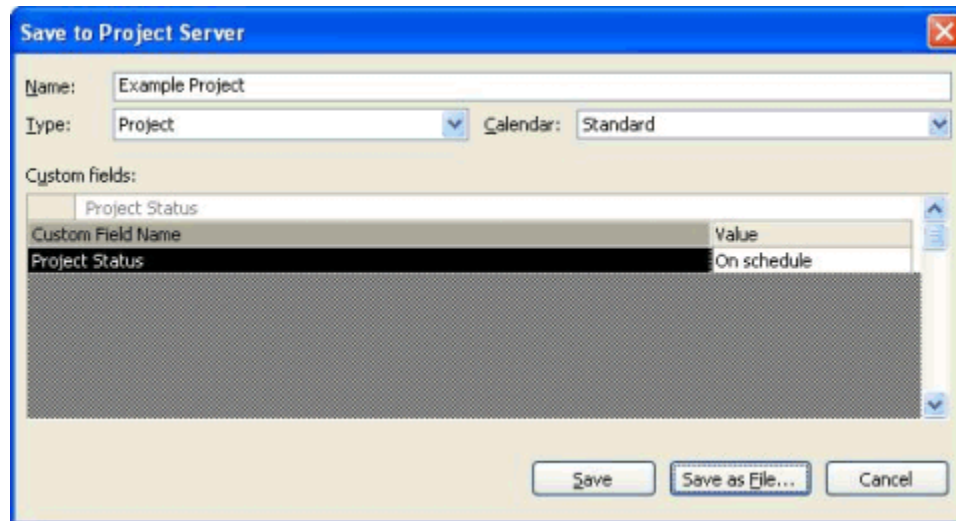
Creating an XML data interchange file from your Microsoft Project file in a Project Server Environment

When working in a Project Server environment, creating an XML data interchange file contains different steps. Follow the steps below if you are working in a Project Server environment:

1. In Project Professional, on the **File** menu, click **Save As**.

2. In the **Save to Project Server** dialog box (Figure 1), click **Save as File**.

Figure 1. Save to Project Server dialog box



3. In the **Save As File** dialog box, you can save the file with only the currently loaded enterprise items, or with all enterprise items. Selecting the option to save only the currently loaded enterprise items can result in a smaller file depending on the configuration of your project.

After you select an option, click **OK**.

Figure 2. Save As File dialog box



4. In the **Save As** dialog box, browse to the location where you want to save the file.

In the **Save as type** list, manually select **XML Format (*.xml)**, and then click **Save**. If you do not select the *.xml option, the project is saved using the default Project file format (.mpp).