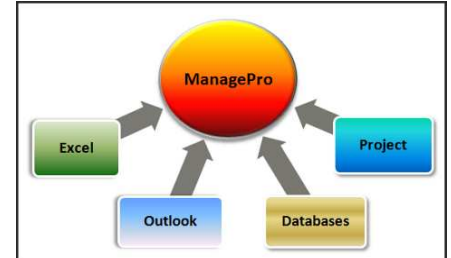


“Pull” Type External Data connections



ManagePro’s External Data Connections provides the capability to pull data from a variety of other programs, including Microsoft Excel files, Project files and databases using Object Database Connectivity (ODBC).

The term “pull data” refers to the ability to pull data from selected fields in MS Excel, MS Project and other databases and insert that data into a specific record’s field in ManagePro. Let’s discuss how to use each of the three External Data Connections, starting with pulling data from Excel.



Pulling Data from Microsoft Excel

In our first example, we’ll perform a data pull from Excel for the purpose of updating forecast information to opportunities in ManagePro. This involves the following steps:

1. Identifying the Excel workbook and worksheet to used for the data pull
 - a. Accessing the Mpro Excel External Connection Option
 - b. Working with the ManagePro Connection Dialog
2. Updating the connection
3. Validating the data pull in Mpro
4. How to pull a Progress Update
5. How to set General Preferences so data from Excel is pulled on start-up

1. Identifying the Excel file and fields: We’ll use the following Excel worksheet in the Quarterly Revenue Planning file. In this example, we’ll pull the data from the Excel columns: Optimistic, Most likely, Pessimistic , and Mean forecast cells into ManagePro fields with the same name.

Opportunity name	Optimistic forecast	Most likely forecast	Pessimistic forecast	Forecast close	Mean forecast
A. Datum Corporation	\$ 150,000	\$ 120,000	\$ 90,000	Q1	\$ 120,000
Adventure Works	\$ 145,200	\$ 122,000	\$ 89,000	Q1	\$ 120,367
Alpine Ski House	\$ 162,500	\$ 120,000	\$ 84,000	Q1	\$ 121,083

Title	Optimistic Forecast	Most likely Forecast	Pessimistic Forecast	Forecast Close	Mean Forecast
Opportunities	0	0	0		0
A. Datum Corporation	150,000	120,000	90,000		120,000
Adventure Works	0	0	0		0
Alpine Ski House	0	0	0		0

1a. Having identified the Excel file, next **access the External Data Connections** by clicking the Synchronization tab in ManagePro



- Click Microsoft Excel from the Synchronization “External Data Connections”>Manage Connections on the Ribbon



- Click Add



1b. **Working with the Excel Connection dialog.** The data entered in the Add/Edit dialog below directs the data pulled from Excel and transferred into MPro. Please take a moment to familiarize yourself with the dialog window below.

ManagePro - Edit Microsoft Excel Connection

Title: My Opps Forecast

Excel Workbook: C:\Documents and Settings\Administrator\Desktop\Quarterly revenue planning1.xls

Create Progress Update

Link to existing Record

Existing Record Settings

Record: Adventure Works

Update only when data has changed in Excel Include in startup update (General Preferences)

Always update

Map Excel Cells to ManagePro Field

Excel Worksheet	Excel Cell	ManagePro Field
Revenue Input	b7	Optimistic Forecast
Revenue Input	c7	
Revenue Input	d7	
Revenue Input	f7	

Optimistic Forecast: useenum10

Original Due: originaldue

Pessimistic Forec...: useenum12

Add Delete

6. Add new rows as needed

1. Enter Connection Name

2. Navigate to the Excel file location

3. Choose to pull the data as either a progress update (to the results field) or a link to an existing record

4. Select the ManagePro record to be updated and update logic

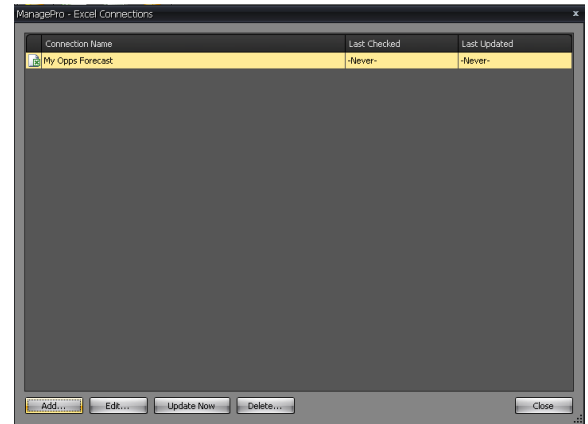
5. Select the Excel Worksheet and map each cell being pulled from to the desired ManagePro field

Update Logic Definitions:

1. **Update only when data has changed in Excel:** Only updates when data is changed in Excel and the Synchronization Update All option has been selected.
2. **Always Update:** Choose this option if you want an update Always, regardless if the data in the Excel fields has changed since the last pull. This option is designed for cases when you want a progress update for example although data has not changed; let’s say you want progress updates every quarter, regardless of whether or not the data has changed. If this is the case, you would select “Always Update”.
3. **Include in start-up update (General Preferences):** Choose this option if you want Mpro to update whatever data pulls you have specified when starting ManagePro – versus when you manually elect to pull the data by clicking on Update Now or Update All on the Ribbon .

- Once you have complete the mapping click OK

2. **Updating the Connection:** Click **Update Now** to pull the data just from your Excel connections to ManagePro, or alternatively select the Update All option to pull data from all of the connection strings you have established (eg. With Excel, Project and SQL).



3. **Validate the data pull from Excel to Mpro:** Back in ManagePro, click the Refresh button found on the Ribbon control.



button found

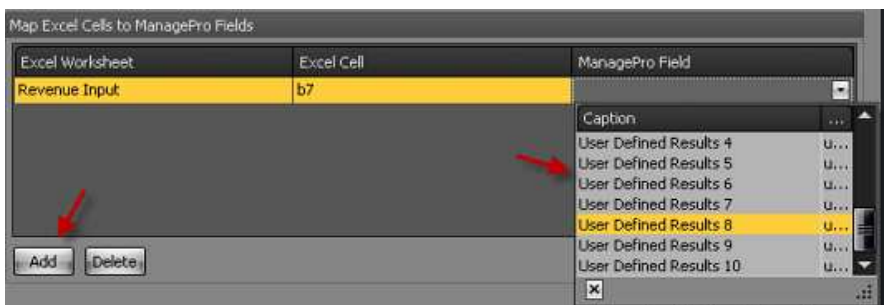
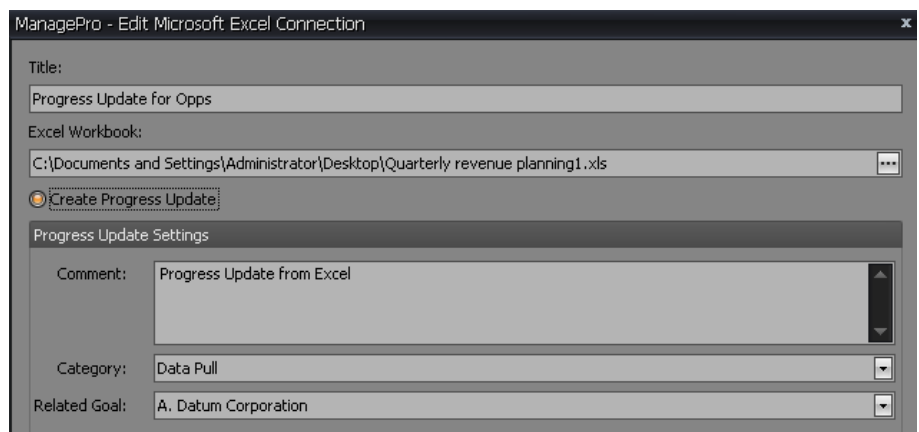
- The data pulled from Excel is displayed in ManagePro.

	Title	Optimistic Forecast	Most likely Forecast	Pessimistic Forecast	Forecast Close	Mean Forecast
	Opportunities	0	0	0		0
	A. Datum Corporation	150,000	120,000	90,000		120,000
	Adventure Works	0	0	0		0
	Alpine Ski House	0	0	0		0

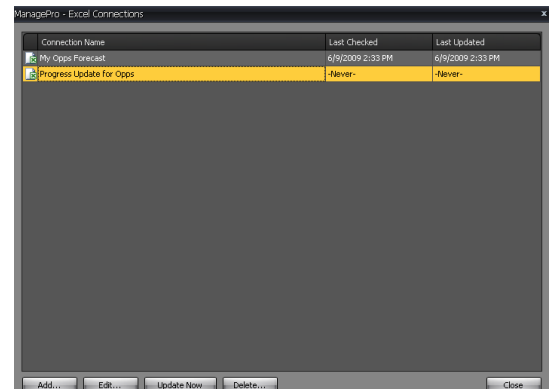
4. **How to Pull Data as a Progress Update:** To add the pulled Data as a Progress Update access the Excel External Data Option found on the Synchronization Tab

- Click the Add button on the ManagePro Excel connection Window

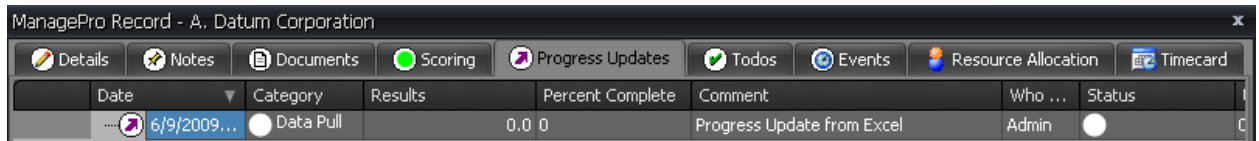
- Enter the Data applicable in the ManagePro Excel Connection Window. In the example below we have added a progress update that will be linked to the data pull performed above.
- Enter the Title
- Navigate to the Excel file path
- Check the Create Progress Update option
- Enter a comment that you would like inserted with each data pull (ex. “Progress Update from Excel”)
- Select a Category if applicable. Note: in the example below we created a category type of Data Pull in ManagePro and then selected that for the category
- Select the ManagePro related goal to which the progress update should be updated.
- Map the fields in Excel to the desired Progress Update fields.



4a. Once the Excel connection information is entered, click OK which will display the Connections Window, and then click “Update Now”



4b. Back in ManagePro click the Refresh button on the Ribbon, and validate the Progress Update has been pulled by navigating to the related goal you mapped in step 4 above.



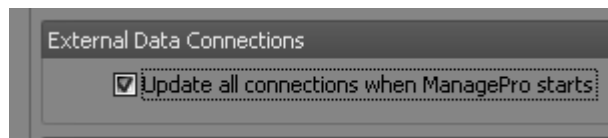
Date	Category	Results	Percent Complete	Comment	Who ...	Status
6/9/2009...	Data Pull	0.0	0	Progress Update from Excel	Admin	

5. If you wish ManagePro to pull data automatically, you can enable that process within the Preferences/General Preferences area.

- Navigate to the Program Button>General Preferences>General Tab



- Check the Update all connections when ManagePro starts.



Note: This will make the initial startup of ManagePro a little longer, as it searches for and completes all the data pulls upon startup.

Pulling Data from Microsoft Project

In our second example, we'll perform a data pull from MS Project for the purpose of updating forecast information to opportunities in ManagePro. This involves the following steps:

1. Identifying the MS Project file to be used for the data pull
 - a. Accessing the Mpro Ms Project External Connection Option
 - b. Working with the ManagePro Connection Dialog
2. Updating the connection
3. Validating the data pull in Mpro
4. How to pull a Progress Update (see step 4 above)
5. How to set General Preferences so data from MS Project is pulled on start-up (see step 5 above)

1. Identifying the MS Project file and fields: We'll use the following MS Project file (.mpp) to pull the total cost, baseline and actual cost and map them to the ManagePro user-defined number fields.

	Task Name	Fixed Cost	Fixed Cost Accrual	Total Cost	Baseline	Variance	Actual
3	January	\$0.00	Prorated	\$51,840.00	\$52,448.00	(\$608.00)	\$51,840.00

Title	...	User Defined Number 10	User Defined Number 11	User Defined Number 12
2009 Budget	...	\$0	\$0	\$0
January	...	\$51,840	\$52,448	\$51,840
February	...	\$0	\$0	\$0
March	...	\$0	\$0	\$0

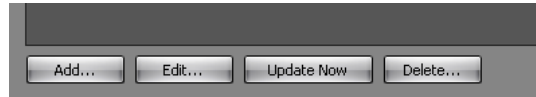
1a. Having identified the MS Project file, next **access the External Data Connections** by clicking the Synchronization tab in ManagePro



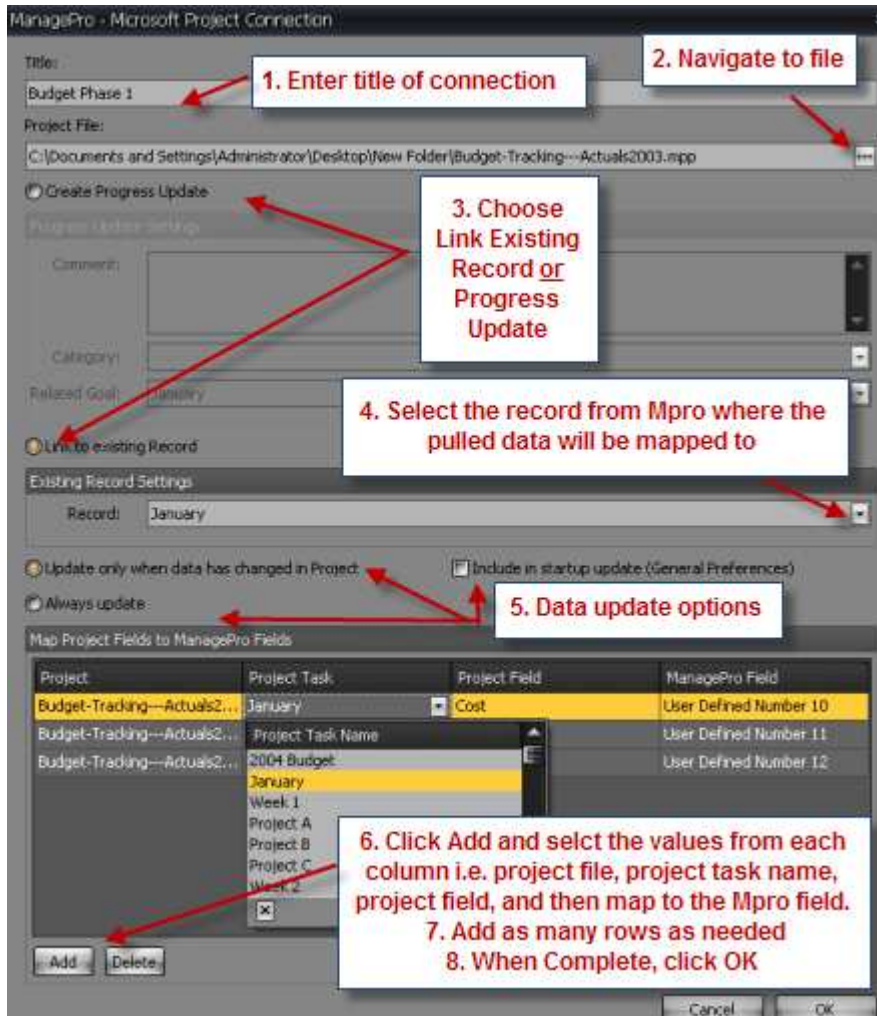
Click Microsoft Project from the Synchronization "External Data Connections">Manage Connections on the Ribbon



Click Add



1b. **Working with the Excel Connection dialog.** The data entered in the Add/Edit dialog below directs the data pulled from Excel and transferred into MPro. Please take a moment to familiarize yourself with the dialog window below



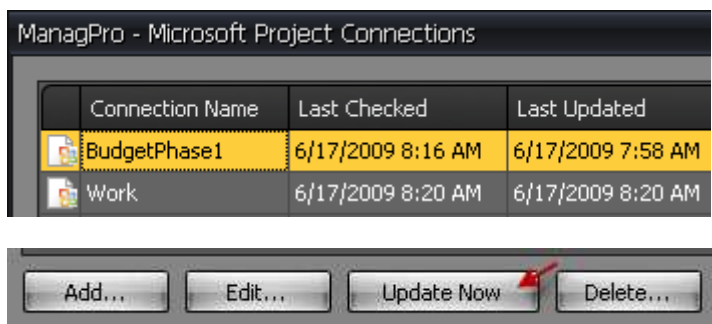
Update Logic Definitions:

1. **Update only when data has changed in Excel:** Only updates when data is changed in Excel and the Synchronization Update All option has been selected.
2. **Always Update:** Choose this option if you want an update “Always”, regardless if the data in the Excel fields has changed since the last pull. This option is designed for cases when you want a progress update for example although data has not changed; let’s say you want progress updates every

quarter, regardless of whether or not the data has changed. If this is the case, you would select “Always Update”.

3. **Include in start-up update (General Preferences):** Choose this option if you want Mpro to update whatever data pulls you have specified when starting ManagePro – versus when you manually elect to pull the data by clicking on Update Now or Update All on the Ribbon .

2. Updating the Connection: Click **Update Now** to pull the data just from your MS Project connections to ManagePro, or alternatively select the Update All option to pull data from all of the connection strings you have established (eg. with Excel, Project and SQL).



3. Validate the data pull from MS Project to Mpro: If necessary, back in ManagePro, click the Refresh button found on the Ribbon control



Results in Mpro. Note: you can rename the user defined number field using Mpro Customization found

Title	...	User Defined Number 10	User Defined Number 11	User Defined Number 12
2009 Budget	...	\$0	\$0	\$0
January	...	\$51,840	\$52,448	\$51,840

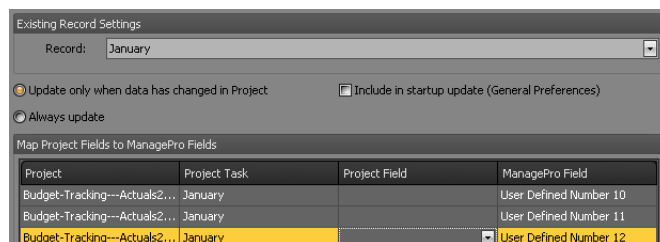
under the Program Button>Customization

4. How to Pull Data as a Progress Update. Please step 4 above for instructions to Pull data as a Progress update.

5. How to set General preferences. Please see step 5 above

Known Issues:

1. NOTE: If you delete or move the .mpp file the field mappings will not be saved! -project files have per-file fields including possibility of custom fields, the code needs to read these from the mpp file in order to display them. The example below shows an instance of an attempt to edit an existing connection and the Project fields are empty.



Pulling Data from Object Database Connectivity (ODBC) data source

Allows the ability to pull one row containing a number of values from any ODBC data source. Each column can then be mapped to a ManagePro field in either a Progress Update or a Goal. Please contact PST at pst@managepro.com or phone 707.487.3000 for an appointment to create your ODBC data source connections.