

# OUTLOOK / PREP INTEGRATION

## Via Microsoft Exchange



### PROJECTS

eBanking

Manufacturing

Imagine ... you have scheduled your Dynamics SL Project with PREP, assigning and scheduling Resources in the process. Wouldn't it be great if those Resources could see their assignments in Microsoft Outlook? Now you can ... with *Outlook/PREP Integration (OPI)*!

## Designed For Microsoft Dynamics SL™ Project Management & Accounting

### Related modules:

- Microsoft Dynamics SL Project Series
- Microsoft Outlook
- Sandler•Kahne's Project Resource Estimating & Planning (PREP)

A joint venture of  
Sandler•Kahne Software  
&  
Plumline Solutions

### The Challenge

Whether you're a professional services company, a specialty contractor, a project-driven manufacturer, or any other project-driven company where resource scheduling is important, chances are you have a few crucial challenges in common:

- Monitoring backlog
- Monitoring Planned Resource Utilization
- Assigning & Scheduling Resources on Projects
- Communicating Schedules to those Resources
- Responding to Schedule Changes

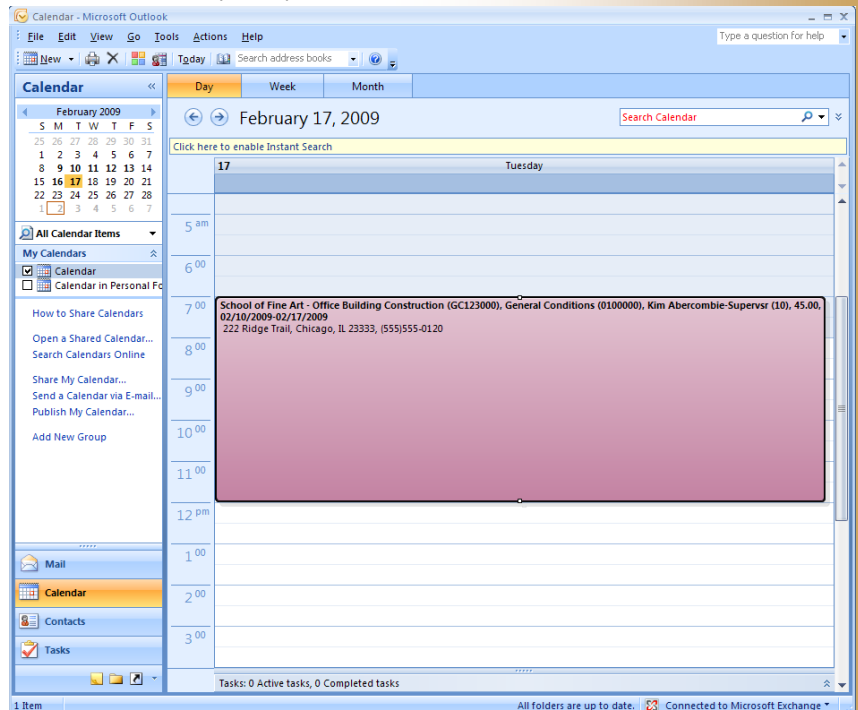
*Project Resource Estimating & Scheduling (PREP)* can help you with the first three bullets. *OPI* can help you with the remaining two.

### Resource's Schedule in Outlook

Of course, the goal is to make it easy for your personnel to see their assignments in Outlook and easily make a change. The adjacent screen shows a sample assignment that was generated by PREP. If the Resource has an un-scheduled conflict and wishes to move that assignment to different day, they can do so and PREP will be automatically updated via Exchange.

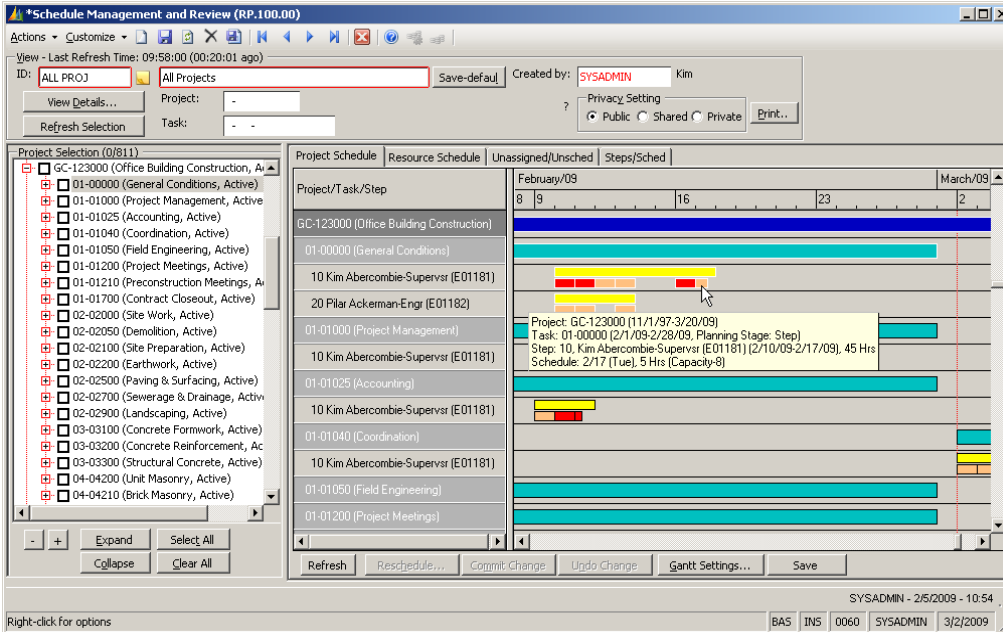
Any changes made by the Resource can either be *automatically* re-integrated with the central PREP calendar, or passed thru an *optional approval* process. Your choice depends on your business requirements.

For indirect time, such as personal time off, company events, etc., simply originate the schedule in Outlook and let Exchange automatically update the central PREP calendar ... no extra effort by the user. This makes it much easier for your Resource managers to have a handle on just what Resources are available, under-utilized, or overloaded. Each type of indirect time has its own Outlook category and can have its own color code.



## Direct Time Originates in PREP

The assignments that show up in the MS Outlook calendar were a result of scheduling activity in PREP. An alternative to MS Project Server, PREP allows you to schedule Resources directly to your Dynamics SL Project. The following screen shows a View in PREP's *Schedule Management and Review* that is highlighting Kim Abercrombie's assignment to a Dynamics SL Project & Task. The tooltip is showing that Kim is scheduled to work 5 of the 45 hours on 2/17. That's the specific assignment that is illustrated in the MS Outlook screenshot on the previous page.



With *Outlook Integration*, any of your Resources can be designated as an Outlook user.

BUSINESS ISSUES	HOW THIS FLEXIBLE PRODUCT CAN HELP
If I've assigned time to my consultant, I want them to be able to change the day, but get approval first.	<b>Activate Approval Requirement</b> On a Resource-by-Resource basis, you can require that changes that a Resource makes to their direct work schedule in Outlook are routed thru an approval process for acceptance or rejection.
If I reject a schedule change request, can I include a note?	<b>Yes!</b> The approver can include a note describing why a change request was rejected.
I only want some of our MS Outlook users to be scheduled by PREP.	<b>Licensed Users.</b> <i>Outlook/PREP Integration (OPI)</i> users are sold in 50-user packs. You can freely assign selected SL Resources to be scheduled by PREP and published to MS Outlook.
Can we run multiple companies, each with their own Exchange Server?	<b>Multiple Exchange Servers.</b> <i>OPI</i> can integrate with as many Exchange Servers as you have configured. Each Resource is configured to an Exchange Server and Active Directory user.
How do I post my indirect time to a Project/Task in PREP?	<b>Outlook Category Mapping.</b> <i>OPI</i> has a system-level mapping for Outlook categories, which can be modified by Resource. This allows different resource classes to have their indirect time (e.g. vacation, etc.) uniquely directed.

## Prerequisites:

Microsoft Outlook 2003, 2007  
Microsoft Exchange 2003, 2007

Microsoft Dynamics SL  
Project Controller

Sandler•Kahne Software  
Project Resource Estimating  
& Planning (PREP)

Available on these Microsoft  
Dynamics SL versions:

**7.0FP, 7.0, v6.x**



**SANDLER • KAHNE  
SOFTWARE**

7731 Tuckerman Lane, #120  
Potomac, MD 20854

Voice: (301)963-7300 x117

Fax: (301)560-4984

Email: [sales@sksoft.com](mailto:sales@sksoft.com)

Web: [www.sksoft.com](http://www.sksoft.com)

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