



Reported Time Import – Antura Integration Standard

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Background

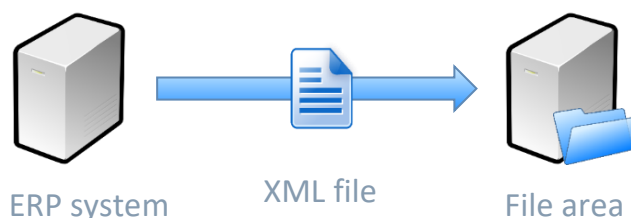
Since 2017, Antura has been offering its customers to import reported time into Antura using Antura Integration Standard. Integration Standard are a kind of add-on products that are continuously updated, in a similar way to Antura, where customers who license them can choose when they want to upgrade to a new version. Unlike custom integrations, Antura Integration Standard are offered to the entire Antura customer base and thus also driven forward by the same.

Technical description

Data is transferred from the customer's ERP system to Antura via XML files. The files have a fixed format that is described in this document. The file is delivered to a file area which Antura monitors. Antura will read the file(s) that is available each day. The file must be uploaded to the file area before a specific time each day to be imported. The time is configurable in the configuration file. By default, the import starts at 01:00 every night.

Files can either be uploaded manually or automatically to the file area. Multiple files per day is supported but it is usually unnecessary as the integrations include a step to clear previously imported time (see more under the section Deletion Strategy).

In the case where Antura is hosted by Antura, an FTPS (or SFTP) account is set up to enable customer access to the file area.



The customer decides how extensive the export file should be, i.e. how far back in time that time should be imported. However, Antura does not recommend that the file contain more than three historical periods (three months).

File format

The input to the imports is read from **XML files**. Antura provides the customer with XML examples and associated XSD files. XSD customization is not allowed.

The names of the files do not matter; as long as the files follow the current XSD for integration, and use "UTF-8" as character encoding.

The file should be delivered to Antura according to the following example (.xml):

```
<?xml version="1.0" encoding="UTF-8"?>
<timeReportImportFile>
```

```

<timeReportItems>
<timeReportItem>
  <userLogin>johnDoe</userLogin>
  <projectNumber>12345</projectNumber>
  <taskReferenceKey/>
  <taskReferenceValue/>
  <date>2016-10-01</date>
  <reportedHours>6.9</reportedHours>
  <internalComment>Finished important proposal from home on a saturday</internalComment>
  <externalComment>This is an external comment</externalComment>
  <customFields>
    <customField>
      <key>Object No</key>
      <value>A</value>
    </customField>
  </customFields>
</timeReportItem>

<timeReportItem>
  <userLogin>johnDoe</userLogin>
  <projectNumber>12345</projectNumber>
  <taskReferenceKey/>
  <taskReferenceValue/>
  <date>2016-10-03</date>
  <reportedHours>7.75</reportedHours>
  <internalComment/>
  <externalComment/>
  <customFields>
    <customField>
      <key>Object No</key>
      <value>B</value>
    </customField>
  </customFields>
</timeReportItem>
</timeReportItems>
</timeReportImportFile>

```

Comment: Each time report item should start with <timeReportItem> and end with </timeReportItem>.

Mapping fields in the file

XML file field	Customer system	Fields in Antura	Example	Mandatory	Comment
userLogin			johnDoe	Yes	Username in Antura
projectNumber			ABC123	Yes	Project number in Antura
taskReferenceKey				No	Name of the task property that is used in task matching
taskReferenceValue				No	Task reference in Antura. E.g. 1102 is always Pre-study. The task code is specified per phase, which together with project number becomes a unique combination.
date			2016-11-25	Yes	YYYY-MM-DD Date per day, on which time has been reported.
reportedHours			4.5	Yes	Total hours for the day and (possibly) specified task. Entered with a maximum of two decimal places, where "comma" is a decimal separator. The value "4.5" means 4 hours and 30 minutes. Negative values are allowed. The number of hours per activity and day must not exceed 999. Decimal (hrs)
internalComment				No	Internal comment

externalComment	No	External comment
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Table 1: Mapping fields in the file.

Project matching

Reported time is linked to projects through one of the following matches (set as configuration) when imported:

Project number (standard)

Matching is done against the project number specified in the project number field in Antura. Matching is not case-sensitive (makes no difference between upper- and lower-case letters).

Multiple project numbers

Corresponding to "Project number (default)" above but with the difference that several project numbers can be specified with semicolon (;) as separator. For example, "87236; 12378; 9872".

Project property

Matching is done against a custom project property.

Task reference

Matching is done against the task reference (*taskReferenceKey* and *taskReferenceValue*) and then uses the project to which that task belongs.

Time is only imported if the time can be linked to exactly one project. In case no project is found, or several projects refer to the same project number, the time is not imported, and an error is reported (see *Error handling* below).

TaskID

If information regarding WBS structure and tasks have been exported from Antura to a separate system for time reporting, the import can be configured to match a unique Task in Antura. TaskID is to be sent in the field *taskReferenceValue* in the .XML import file.

Task matching

Time can be added at any level in the WBS tree¹. This is controlled by the *taskReferenceKey* and *taskReferenceValue* fields.

¹ Time reporting needs to be enabled for the current WBS element in Antura.

User identifier

The identification of users to whom the reported time belongs is done through the username and must therefore be the same in the XLM file as in Antura.

By default, users who are marked as "deleted" in Antura but exist in the file will not have their time reports cleared (see *Deletion strategy* below) and will also not have new time imported. There is an option to import time for users marked as "deleted," which is configurable in a configuration file.

In the event that deleted users are present in the file, errors will be reported back (see *Error Handling* below), provided that you have not modified the configuration file to import time reports for users marked as "deleted". The username is case insensitive.

Imported time

Time will be imported and made available in all reports and views showing reported time in any way.

After each imported time entry for a user and a project, the reported time for that project and the user is locked.

Technical note: The imported time will be locked automatically per user and project via a time report lock, which means locking a user's time on a certain project up to a certain date. Prerequisite is that the system setting "Use lock of time reporting" is activated.

For each project, which is matched with reported time, the integration will automatically make the project global/tasks reportable to "Everyone". It is a setting for time reporting in the project, which is a condition that time can be imported into the project, regardless of whether the resource is active/inactive user or added as a member/resource in the project.

Management of reported time actual

In the event that there is an active cost integration that includes an cost actual for the time reported in the ERP system, measures must be taken to avoid duplicated cost actual for resources.

Antura can, when applying hourly rates, also generate a corresponding cost actual, calculated on the number of hours and the stated hourly rate in the system. In order to avoid generating "double" reported time cost actual (in the case of cost actual for resource hours being imported), the standard hourly rate for the resource needs to be set to "SEK 0". It is suggested that this is done by setting "Hour price 1" for the resources to "0 SEK" and marked as default. In the follow-up and actual views, the user selects "Actual: Standard". The corresponding choice should be made by the user for calculation and calculation/comparisons in follow-up views, e.g. "Estimate: Hour rate 2" or "Estimate: Role".

Deletion strategies

Before the import of an import file begins, previously imported hours are cleared based on one of the following deletion strategies. The deletion is done to include changes that have occurred for previously imported hours. Therefore, the file must contain all transactions from the earliest date in the file to the current date for the hours to be complete.

From the earliest date in file per resource (standard)

In order to achieve a correct reflection between the ERP system and Antura, (parts of) the previously imported times will be purged to deal with any changes in the business system. The purge is done for imported time reports from the earliest date from the entries in the import file up to the current date, grouped by resource. What the grouping of resources means is explained in the example below.

Example: A file is created on November 25 (2016-11-25) containing a time report for resource X with dates from 1st of September (2016-09-01). Then previously imported time reports will be purged from 1st of September to 25th of November for Resource X. This requires that the import file contains all time reports from 1st of September to 25th of November from Resource X in order for the content to be complete.

From the earliest date in file per resource and task property

The deletion is done from the earliest date in the import file per resource and task property. The task property value needs to be unique in Antura. Preferably used in combination with the project matching logic *task matching*.

From the earliest date in file

The deletion is done from the earliest date in the import file for all resources.

Note! The deletion is done for all resources in Antura, not just the resources in the new file.

Error management

In connection with an import, the following reports can be sent. The reports are sent to one or more predefined email addresses.

Reconciliation report

The reconciliation report shows the total amount of hours imported and the total amount of hours in the file.

Error report

The error report shows project numbers for the projects found in the import file, but which could not be matched with existing projects in Antura.

This report is only sent if errors occur.

Error report for unexpected errors

If an unexpected error occurs during the import, it will be interrupted. The time that has been imported will remain imported and the items that have not yet been imported will not be read again from the file.

The mail sent contains no details. Troubleshooting takes place with Antura's support.

This mail is sent, for example, if the format of the import file is not correct, if any required fields are missing, or if other unexpected errors occur.

Configuration

Comments	Value
One or more email address that will be recipient for reports, separate email with semicolon	
First line in email reports	CUSTOMER NAME [Test]
Send email report even if no errors occurred	True/False
Language for email reports (English: true, Swedish: false)	True/False
Culture to use when parsing decimal amounts ("en-US" for dot decimal separator or "sv-SE" for comma decimal separator)	en-US/sv-SE
Format to use when parsing dates	yyyy-MM-dd
Lock time after import	True/False
Send time after import	True/False
Global fallback is when reported time falls on Global time instead of matching task	True/False
Import time for users marked as "deleted" Default false	True/False
How to perform project mapping? ProjectNumberCaseInsensitive (default), DelimiterSeparatedMultipleProjectNumbers, OnlyProjectProperty,	ProjectNumberCaseInsensitive (default)

ProjectNumberAndProjectProperty FromTaskReference	
Deletion strategy (PerUserAndMinDate (Default), PerGlobalMinDateInFile or PerUserAndTaskReferenceAndM inDate)	PerUserAndMinDate (Default)
Optional configuration	
Encoding for import files (default UTF-8)	
When using OnlyProjectProperty as project mapping strategy, this specifies the key of the customFiled that holds project property NAME to use for mapping	
When using OnlyProjectProperty as project mapping strategy, this specifies the key of the customFiled that holds project property VALUE to use for mapping	

Prerequisites (for internal installation)

For internal installation

- The folder where the import file is to be read must exist and be configured during installation.
- The folder where the import file is to be read must be unique and not used by any other import.
- The system account (application pool user) running Antura must have write permissions in the folder where the import file is added.

Other

- The import file will be archived after the completed import.
- The integration is built against the latest available version of Antura when the development starts.