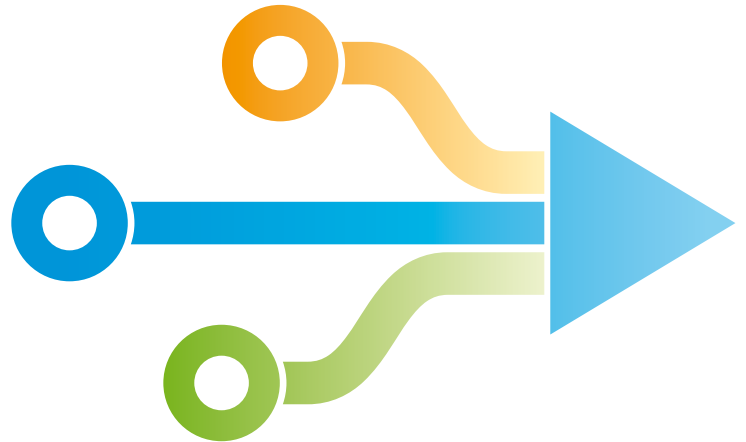


EASY PROJECT *INTEGRATION* HANDBOOK

How to integrate and migrate data from
third-party systems to Easy Project

2020





Strength of Integration

Nowadays, system integration is more important than ever. Many companies manage different areas of their business, such as project management, finance, development or CRM, in several systems at the same time.

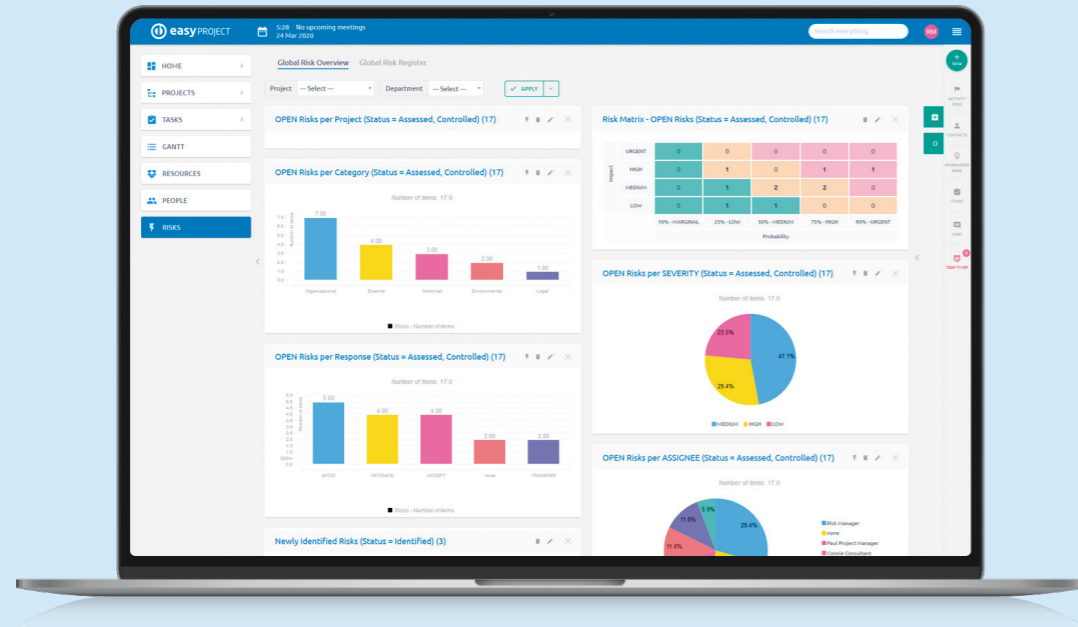
According to Gartner (April 2018) Magic Quadrant research about Enterprise Agile Planning Tools, if your system has strong integration capability and includes a RESTful integration API, ***you will be the leader in the market*** and your system will be usable for 50 % clients for more than three years.

Easy Project offers a complete solution for integration and data migration from third-party systems. The system is ready to be connected with more than 1,000 apps using Zapier, synchronized with Rest API and to have data imported or exported.

This Easy Integration Handbook brings you more information on easy integrations with third parties software. Choose the right ***technology***, define ***workflow***, implement and evaluate a ***price***.

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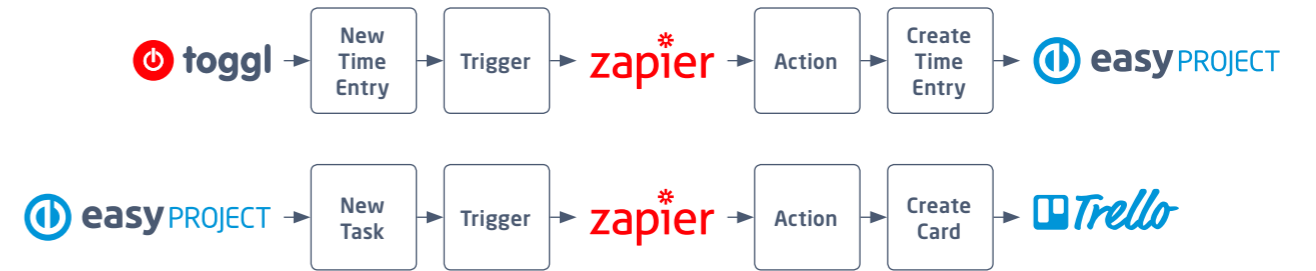
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Technology

1.1 Zapier

Zapier is an integration middleware connecting Rest APIs of more than 1,000 applications. It is possible to develop events to handle a request on API for every application. An event is a Trigger to get new or updated data from the application, an actions create new or update data into the application and Search finds some data in the application. With those events, you can connect and integrate

applications available on Zapier. Easily set up an automated workflow called Zap made of a trigger and an action. When Zap is running and the trigger event happens in one application, Zapier automatically makes the action event in the other application.

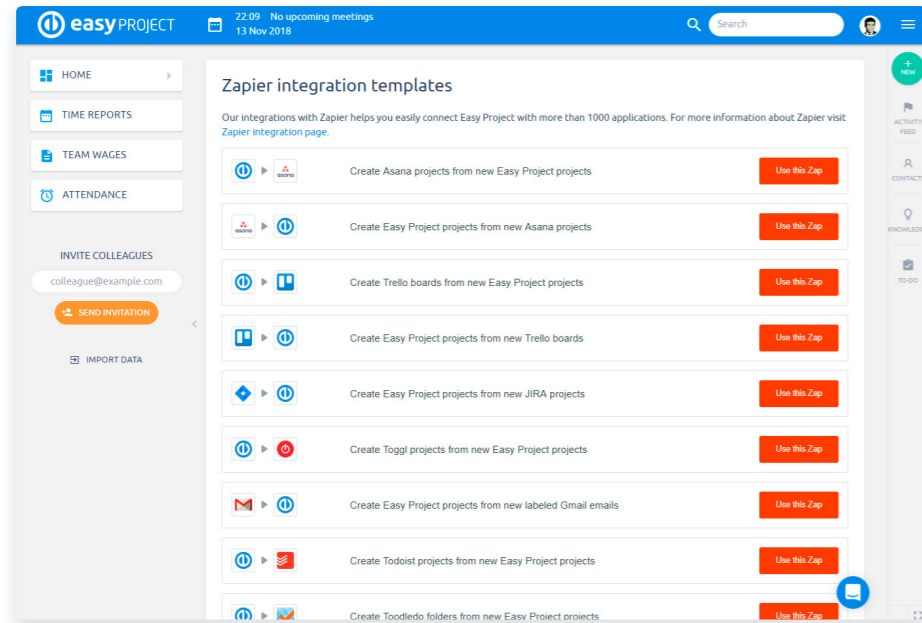


1.1 Zapier

Zapier profile page

Templates

Zapier platform allows creating Zap integrations through templates. Every template defines automated workflow and consist of applications trigger and action, so you can set up Zap integrations by yourself. Just sign up for the account using our Zap templates from **MENU MORE > ADMIN > ZAPIER INTEGRATION** or find more templates on our Zapier profile page (<https://zapier.com/apps/easy-project/integrations>).



1.1 Zapier

Integration benefits

Thanks to Zapier platform you are able to integrate Easy Project with your applications without further development for a particular integration of each application. Events to handle the request on APIs are already developed here. Just integrate application through a step-by-step wizard, everything is connected and handled by Zapier.

This solution is great for middle companies with a need for a quick self-integration through templates and for prototyping complex integration through Rest API. With Zapier tasks history you have a control over all integration logs. Of course, Zapier is middleware service, therefore there is a charge for the data transactions.

1.2 Rest API

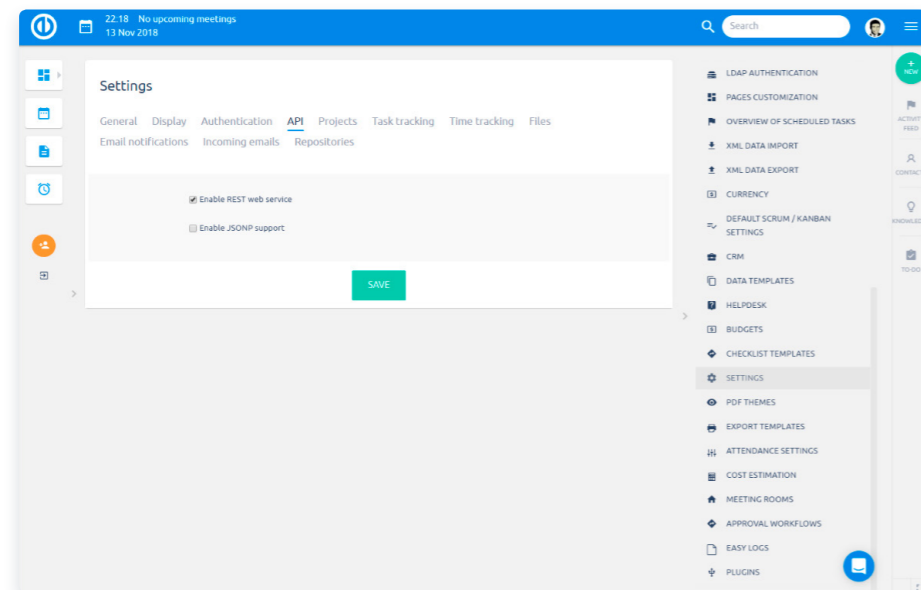
Apiary

Easy Project has a complex Rest API that enables integration with other applications which use Rest API as well. Our API interface provides the following operations: read, create, edit, delete with the following entities:

- Tasks
- Projects
- Project templates
- Time entries
- Users, user groups, user types
- Incomes and expenses (project budgets entities)
- Attendance entries
- Contacts, CRM cases
- Invoices
- Attachments
- Milestones
- Budget sheet

A complete interactive documentation of Easy Project Rest API can be found on Apiary. There should be also developer custom API modification for your needs. Rest API must be turned on in your application. **MENU MORE > ADMIN > SETTING > API.**

Thanks to Rest API, it is possible to integrate Easy Project with other applications through integration middleware that handles requests between applications APIs. If your application is not available on Zapier platform but supports Rest API you can still use Zapier as integration middleware via Zapier webhooks events. The second option is to develop external microservice to handle the request on applications APIs.



Zapier webhooks page

Zapier webhooks

With this built-in Zapier application you are able to create your custom API requests and use it as triggers or actions for Zap integration. Even though your application is not available on Zapier, you can still use the power of Zapier as integration middleware and integrate your applications with Easy Project. Learn more on Zapier webhooks page.

This solution is great for companies using a system which is not on Zapier, but you want to use prepared middleware platform for integration through Rest API. With Zapier you have still control over all integration logs. Service is paid but if your business is dynamic with new workflows, with Zapier you can easily set up new integration without developing, so you definitely save your costs.

External Microservice

In this case, the custom middleware which provides external microservice must be developed. Then a microservice developer is able to set up custom requests to applications APIs and thus connect Easy Project with other application to get integrated.

This solution is great for huge companies using a system which is not on Zapier and integration is complex or the number of a data transaction is really high, but you need pay development or implementation of custom microservice and maintenance or updating.

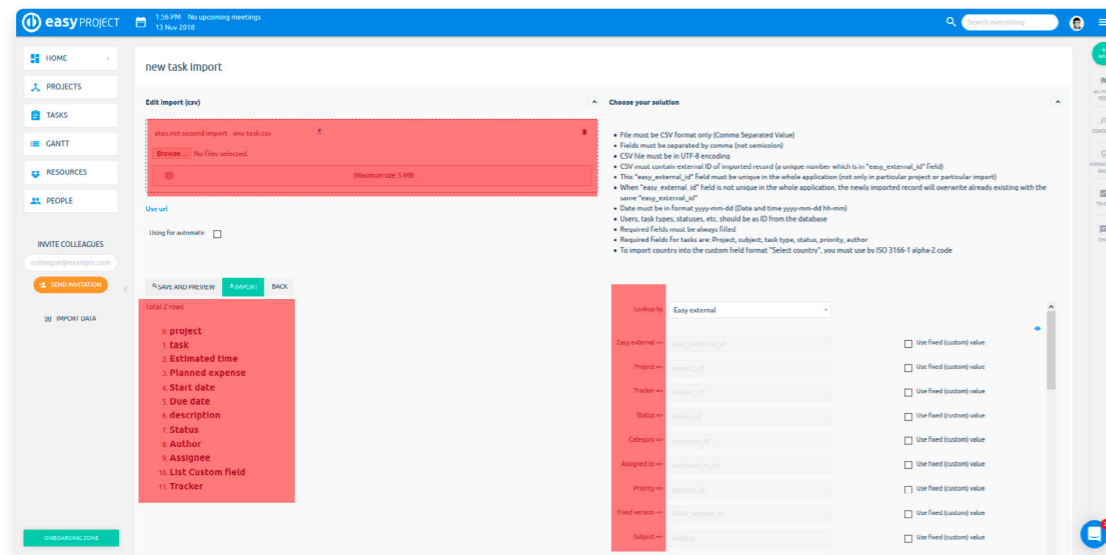
1.3 Automated XML/CSV imports

Easy Project allows custom import interface. This is handy when it is possible to export structure of the data from your system in XML/CSV file. This file should be uploaded to the import interface. Columns from this XML/CSV documents need to be matched with names of Easy Project fields. Importer you can find in **ADMINISTRATION > CUSTOM IMPORTS**.

Easy Project also allows you to update existing entries. Imported entries with ID that already exists in the system are not created again, but they get updated.

Imports and updates can be performed automatically in data batches, if the imported document is accessible on public URL, Easy Projects automated operations (cron) can regularly import the XML/CSV provided on public URL.

This solution is great for companies using systems does not support Rest API but allows XML/CSV export, so there is another way how to get integrated. Easy Project provides XML importer enables you to migrate data in batches and mapped to existing attributes. This solution requires our support services or paid implementation services.



1.4 Standardized imports

If you starting with Easy Project and need to implement your projects and tasks from MS Excel, Jira, MS Project or Asana, you can use standardized imports. Just click on Import data in you application or go to **MENU MORE > ADMIN > STANDARDIZED IMPORTS**.

Microsoft Excel

Import your data into Easy Project directly from a Microsoft Excel file. You can easily migrate entire projects, tasks and sub-tasks in one step, including automatic mapping migrated data to existing attributes in Easy Project. Help: https://yourdomain.easyproject.com/easy_imports/help/excel.

Microsoft Project

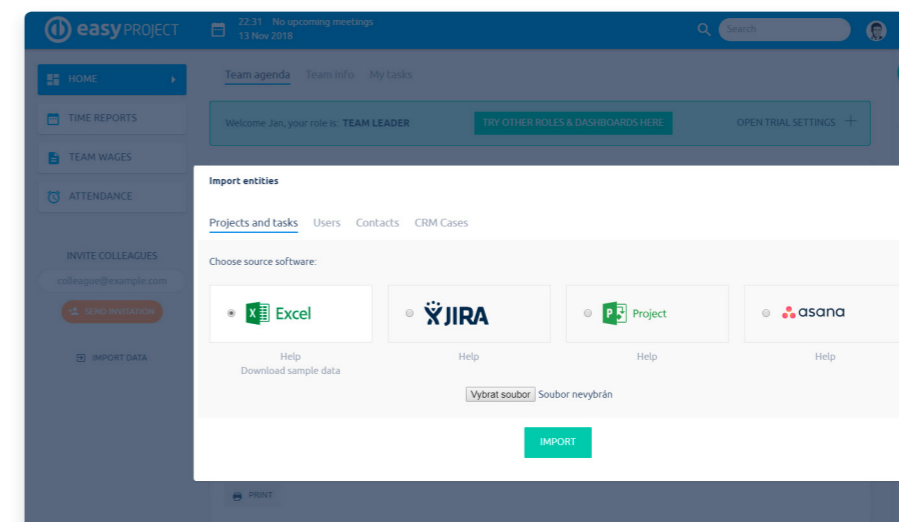
If you used Microsoft Project before going to Easy Project, you probably have a lot of data in need of transfer. You can do it very easily! This tool allows importing projects and tasks created in Microsoft Project into our application. Help: https://yourdomain.easyproject.com/easy_imports/help/ms_project.

Jira

Jira importer is a very useful tool when you are going to convert any data from your existing Jira project system into Easy Project. Just export the relevant data from Jira and then follow our simple instructions for importing the file. Help: https://yourdomain.easyproject.com/easy_imports/help/jira.

Asana

If you want to migrate your projects and tasks from Asana to Easy Project, there is nothing easier than use this importer. First, export the selected data from Asana and then upload the exported data file to our application. Follow a few simple import instructions. Help: https://yourdomain.easyproject.com/easy_imports/help/asana.



1.5 User integration

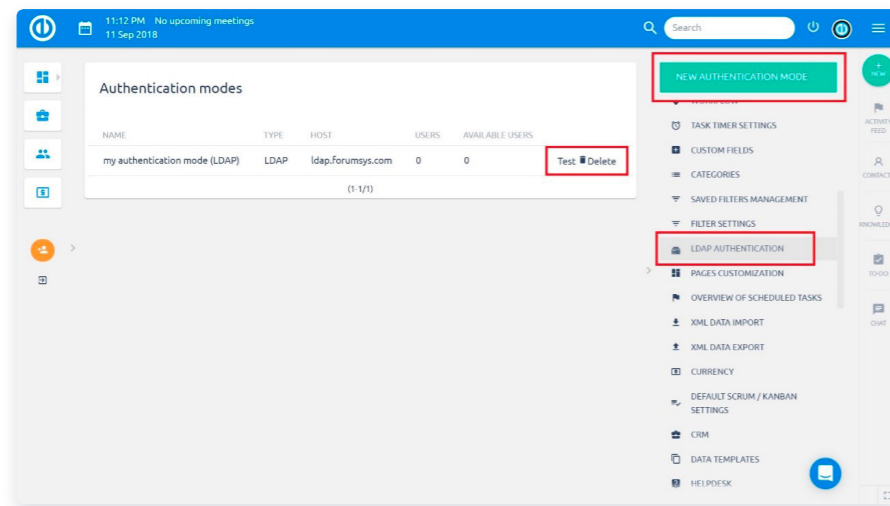
Documentation

LDAP

LDAP (Lightweight Directory Access Protocol) is a software protocol for enabling anyone to locate organizations, individuals and other resources, such as files and devices in a network, whether on the public Internet or on a corporate intranet. LDAP is a „lightweight“ (smaller amount of code) version of Directory Access Protocol (DAP), which is part of X.500, a standard for directory services in a network.

LDAP is lighter because it did not include security features in its initial version. Easy Project natively supports LDAP authentication using one or multiple LDAP directories. The supported directory service types include Active Directory, OpenLDAP, eDirectory, Sun Java System Directory Server as well as other compatible directory services.

More information about setting LDAP authentication to be found in our documentation.



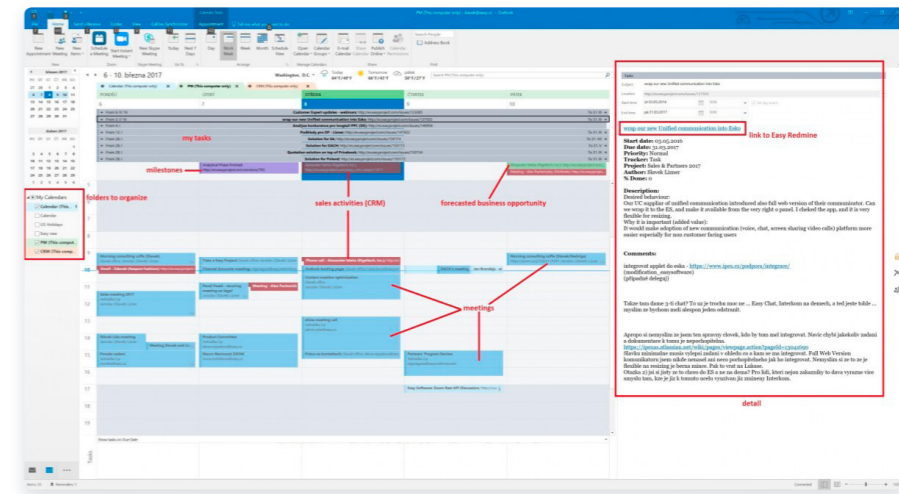
1.6 Outlook & Calendars integration

Documentation

Calendars and contacts synchronization plugin for Microsoft Outlook, which synchronizes events, tasks, CRM data, contacts and other resources between Easy Project and Outlook. Easy Project server uses CalDAV/CardDAV standard, which means that also other compatible apps and devices can be used instead of Outlook such as Mozilla Thunderbird, Apple iOS or Android OS with a sync app installed.

Calendars and contacts synchronization plugin brings a better experience to all Easy Project users, not only to users of Outlook e-mail client. Now, users of all CalDAV compliant calendar apps can experience the same visualization like in Meeting calendar of Easy Project.

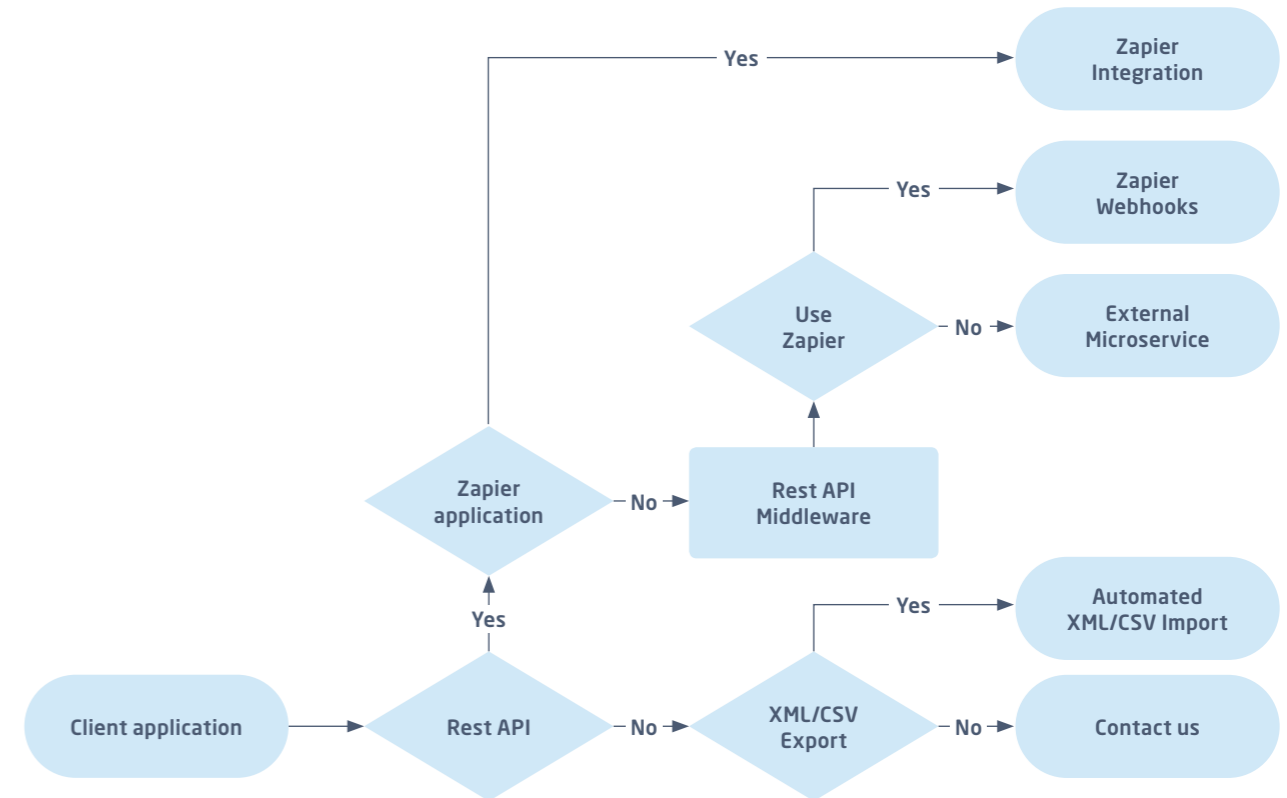
More information about setting calendar integration to be found in our documentation.



Analysis

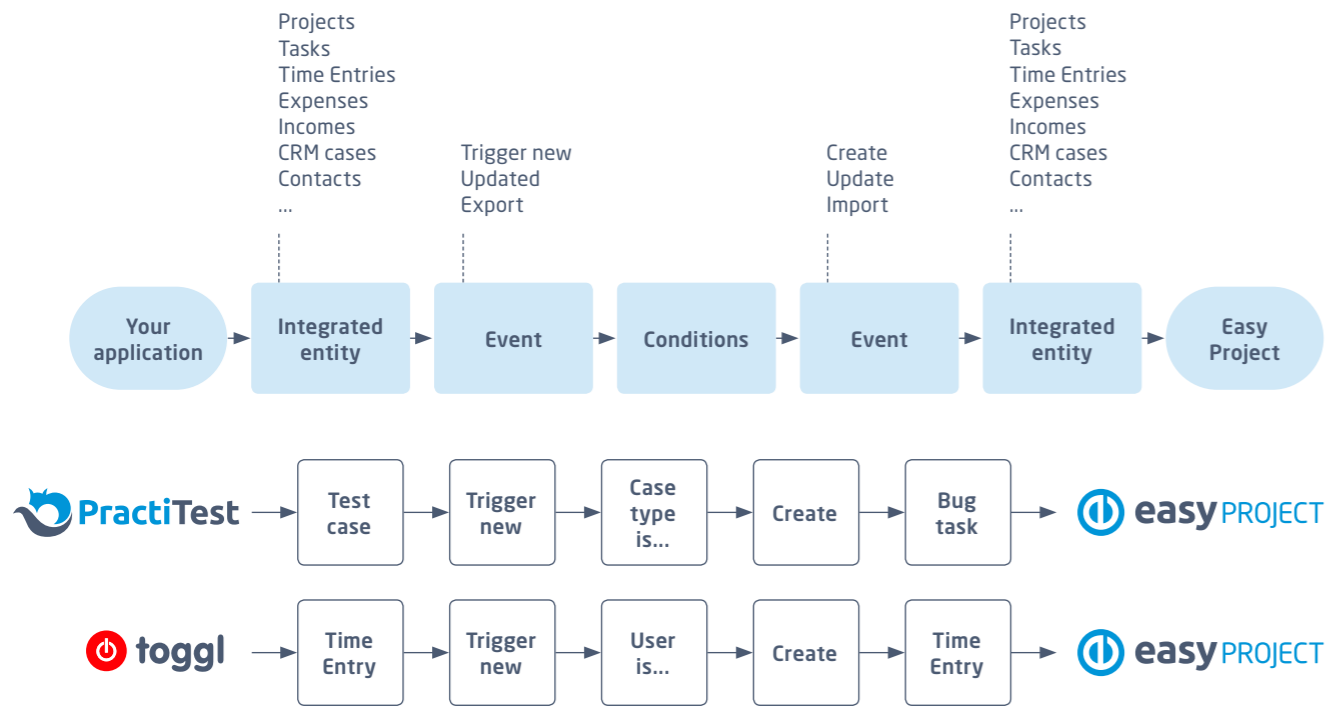
2.1 Choose technology

Easy Project supports all levels of integration technology, but it also depends on clients application. Use the diagram below to choose the right technology for integration.



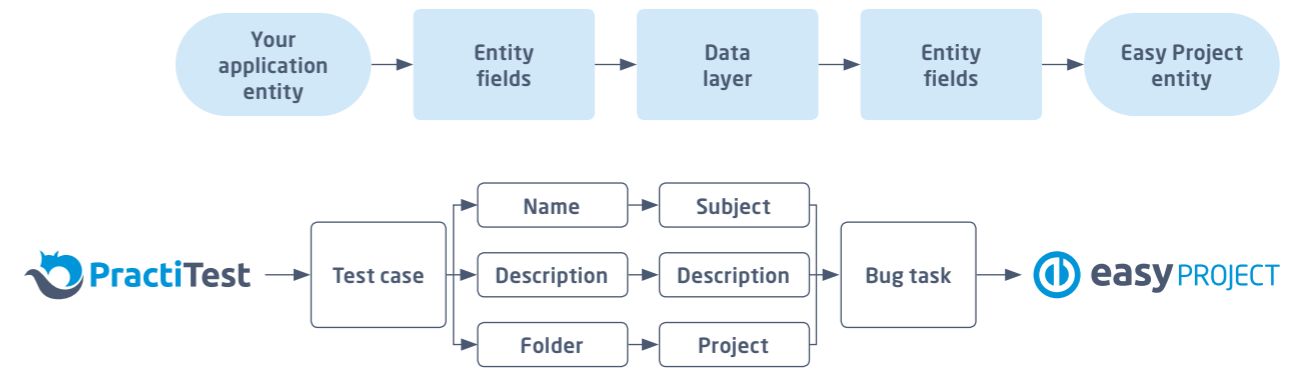
2.2 Define workflows

To implement the right integration, it is necessary to define workflow (data process) for each integrated entity from start application to end application. In the workflow must be defined event (operation) for each entity and possible conditions. Use the diagram and example below to define the right integration workflow.



2.3 Define data layer

Workflow is important for each integration to define the data layer. It is the connection of fields of integrated entities. Through this layer are operated data between integrated applications. Use the diagram and example below to define the right data layer.



2.4 Integration traffic

To define the price for Zapier middleware service, cron jobs setting or implementation is important to analyze the traffic of integration.

Number and types of entities

Integration traffic is determined by entities. Define all types of integrated entities to see how many workflows will be part of the whole integration solution. It is important for a number of Zaps, the complexity of external microservice or number of cron jobs.

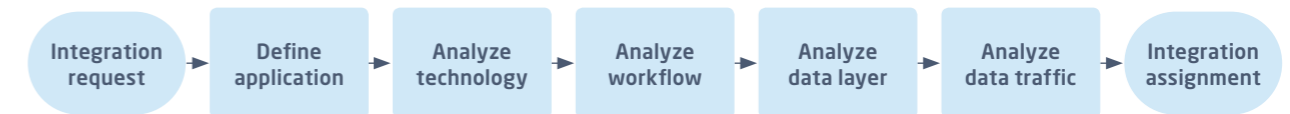
Number of data transactions

A frequency of transferred data for each workflow determines a complete number of data transactions and final price for Zapier service. Some data should be multiplied by the number of users using application.

Implementation

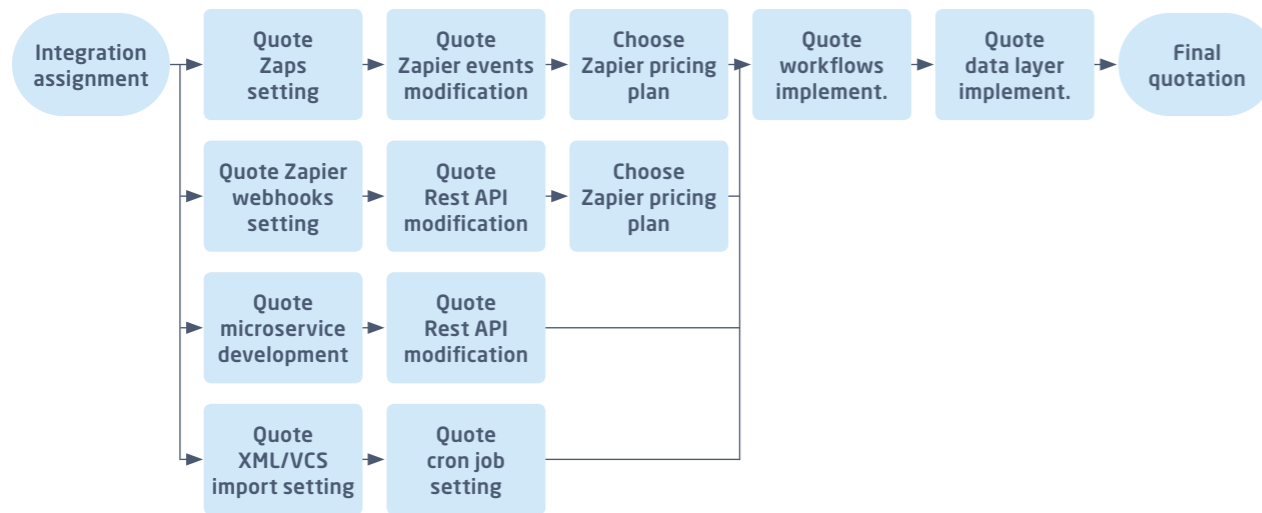
3.1 Analysis process

The first part of implementation is an analysis process which defines Integration assignment. This document is important for quotation of the integration solution and used for the final part of the implementation. To define an Integration assignment, use previous analysis chapter.



3.2 Quotation process

The second part of implementation is quotation process which is based on Integration assignment and defines final quotation for integration solution. After quotation is approved by client final part of implementation could start.



3.3 Implementation process

The final part of implementation is the realization of an integration solution which is based on previous Integration assignment.



Contacts

Client zone



<https://www.easyproject.com/client-zone>

Looking to purchase some extension modules and plugins? Go to your Client zone from web or your EP instance.

In Client zone you can:

- Update your billing information
- Upgrade your subscription plan
- Purchase extension modules and plugins
- Manage your invoices
- Create and view Help Desk Tickets
- Manage your zoom subscription for audio/video meetings

Training center



www.easyproject.com/services/training-center

Take your first steps towards easier project management. Learn about basic Easy Project features and how to apply them.

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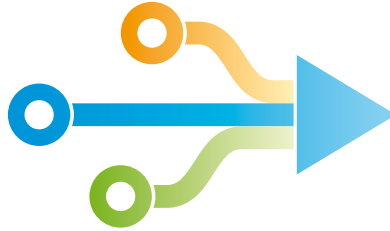
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