Deltek

Deltek People Planner 4.6

Integrations Guide

June 28, 2024

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Contents

Introduction

Note: This document is intended to evolve as types of integrations are added, as technology changes, and as additional information becomes available. As a result, some sections may be in a draft state. Such sections are clearly marked as drafts.

This document describes the integrations that People Planner supports:

- Integration with Maconomy.
- Import from Excel, CSV, SQL Server, and Oracle.
- Integration with Exchange and Outlook.
- Integration with Microsoft Project.
- External Views and the integration with BPM

The intended audience is mostly Technical Consultants who need to know how to:

- Install the software.
- Configure the integrations.
- Troubleshoot any problems.

This document describes both ends of the integrations. It is assumed that the reader knows how to use the People Planner Admin Tool. It is likewise assumed that the reader knows, for example, how to use MConfig to set up system settings in Maconomy.

This document has been updated to People Planner 3.7, but the majority of the text should apply to any version of People Planner.

Terms and Abbreviations

The following table defines some of the central terms used in People Planner.

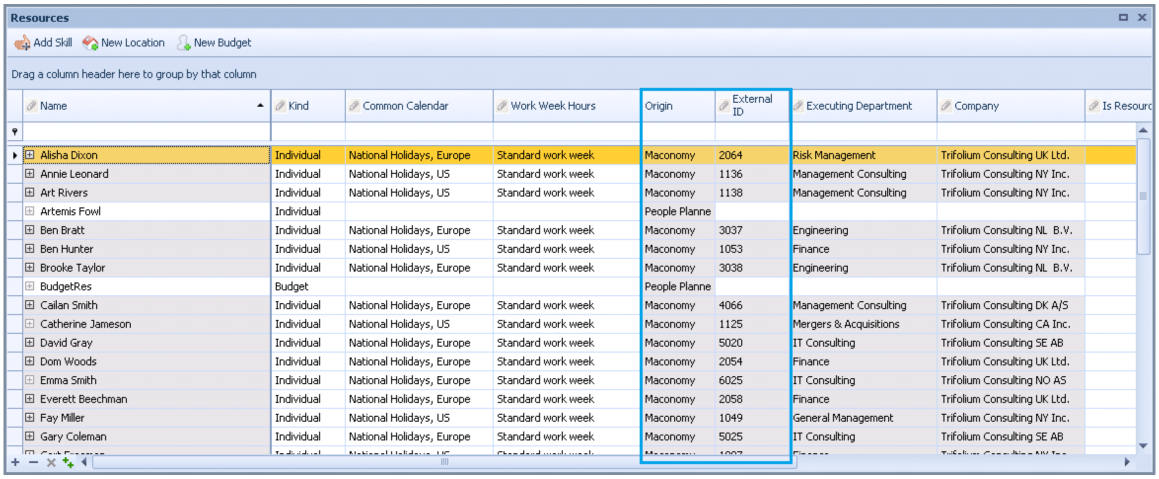
Term	Description
BPM	Deltek Maconomy Business Performance Management, which is a BI (business intelligence) system for analyzing data from Maconomy and People Planner.
Classic Budget	This is one of the two types of budgets in Maconomy; the other is the Matrix Budget. Maconomy has always supported classic budgets, and People Planner has always been able to import them.
ETC	Estimated Time to Complete.
Event	Common term for a project, task, summary, absence, or milestone in People Planner.
IIS	Internet Information Services; Microsoft web server. Used to serve MyPlan, the People Planner Web Component, and the People Planner web services.
Matrix Budget	This is one of the two types of budgets in Maconomy; the other is the Classic Budget. This is a relatively new type of budget in

Term	Description
	Maconomy, and People Planner began providing the ability to import them beginning with version 3.6. See Job with a Matrix Budget for an example.
PG	Project Manager Gantt Chart
RG	Resources Gantt Chart
SSI	Silent Sign-In. This technology is used when MyPlan and the People Planner Web Component are embedded in the Maconomy Work Space Client. This ensures that users are not prompted for login credentials; instead, the Maconomy Coupling Service supplies the login credentials without users having to be aware of this. **Note:** SSI should not be confused with IIS.
WSC	Maconomy Workspace Client.

Origin and External ID

Many of the integrations are about importing data from some external source into People Planner, and it is sometimes important to know where the data originally came from.

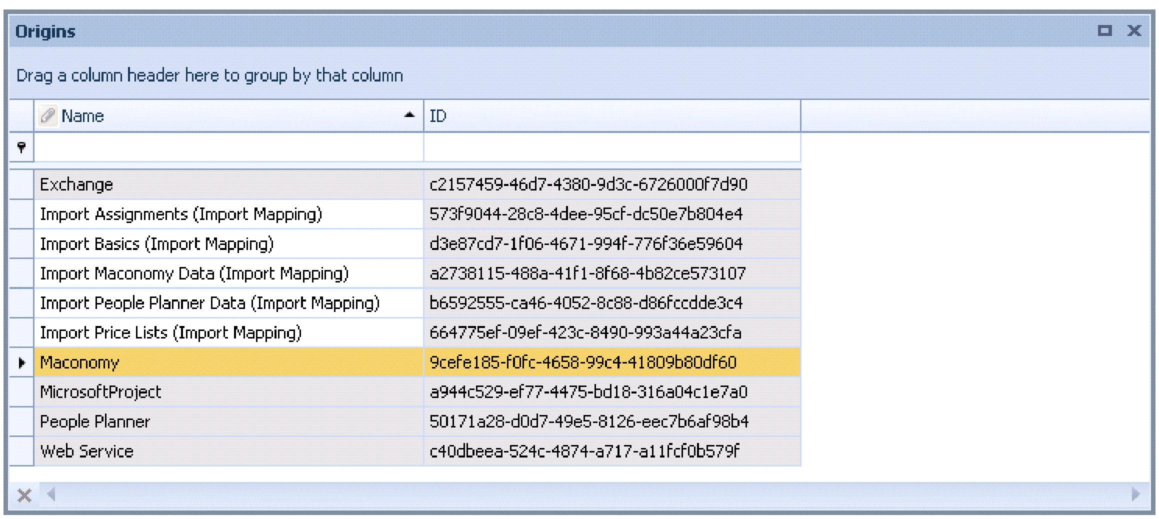
All data in People Planner has an **Origin**, which describes where the data came from. In most views, the user can add the Origin column from the Column Chooser if interested in seeing this.



When the data is from an external source, it also has an **External ID**, which identifies it uniquely in that system. As an example, if the data is a resource that has been imported from Maconomy, the External ID is the Employee number in Maconomy.

> **Note:** As a rule, most data that was imported from Maconomy cannot be edited in People Planner. However, there are some exceptions to this.

You can see the possible origins by navigating to **Views** » **Tasks** » **Origins**.



The most important origins are listed in the following table.

Origin	Description
Exchange	Data from the integration between People Planner and Exchange/Outlook. This data was created in Outlook and then synchronized via Exchange with People Planner.
Import Mapping	Data that has been imported from a file (CSV or Excel), or directly from another database (Oracle or SQL Server). **Note:** Each Import Mapping has its own Origin.
Maconomy	Data that has been imported from Maconomy through either the MaconomyWS or Maconomy RESTful web services.
Microsoft Project	Data from the integration between People Planner and Microsoft Project.
People Planner	Data that has been created directly in People Planner, including the MyPlan web application.
Web Service	Data that has been created by calling the People Planner API[1] web service.

[1] The MaconomySetHalfYearBudget method, specifically.

Tasks

Many—although not all—of the People Planner integrations are built on top of the Task functionality to enable scheduling, for example to make it possible to run an import task on a nightly basis. Before describing the integrations themselves, this section covers Task Specifications and Scheduled Tasks.

> **Note:** The Delete old log entries task, introduced in People Planner 3.6.1, also uses a Task Specification, even though it is not an integration.

The following table lists the integrations that use Tasks.

External System	Integration	Uses Tasks?	For More Information
Maconomy	Import of Master Data	Yes	Import Master Data from Maconomy
	Import of Projects	Yes	Import Projects from Maconomy
	Export of Favorites	Yes	Export Favorites to Maconomy
	Import of Absences	Yes	Import Absences from Maconomy to People Planner
	Import of Actuals	Yes	Import Actuals from Maconomy
	Export of ETCs	No. Maconomy calls the People Planner API web service directly to get the ETCs.	Export ETCs to Maconomy
	MyPlan embedded	No. No data is transferred between Maconomy and People Planner.	MyPlan
	People Planner Web Component embedded	No. No data is transferred between Maconomy and People Planner.	People Planner Assistant
Files	Import from Excel and CSV	Yes, but this also relies on some external mechanism to populate the files and place them where People	Import Data from Excel, CSV, SQL Server, and Oracle

External System	Integration	Uses Tasks?	For More Information
		Planner can find them.	
Databases	Import from SQL Server and Oracle	Yes	Import Data from Excel, CSV, SQL Server, and Oracle
Exchange/Outlook	Synchronization of bookings and to-do's	Yes	Import Data from Excel, CSV, SQL Server, and Oracle
Microsoft Project	Import and Export	No. Only manual import and export are possible.	Import Data from Excel, CSV, SQL Server, and Oracle
BPM	External Views	Yes. For keeping the DayIntervalEntry table updated.	External Views and the Integration with Maconomy BPM

Any import in People Planner that relies on the Task functionality must start with a Task Specification.

Note: In most cases, the Task Specification is the lowest level, but in some—for example, import from Excel/CSV/SQL Server/Oracle—it builds on top of an even lower level in the form of an Import Mapping. See Import Mappings.

A special type of Task Specification—the Batch Task Specification—can be used to bundle several Task Specifications as a package, where they are then executed one by one.

You can use a scheduled task to schedule on top of the (Batch) Task Specification, thereby enabling People Planner to run the task at preset times.

When importing data, you have at least the following options for importing data:

1. Manual import from the Task Specification — Executed by the People Planner Windows application.
2. Manual import from the Scheduled Task — Scheduled using the Scheduled Task view in the People Planner Windows application and executed by the People Planner Service.
3. Automated import from the Scheduled Task —Scheduled using the Scheduled Task view in the People Planner Windows application and executed by the People Planner Service.

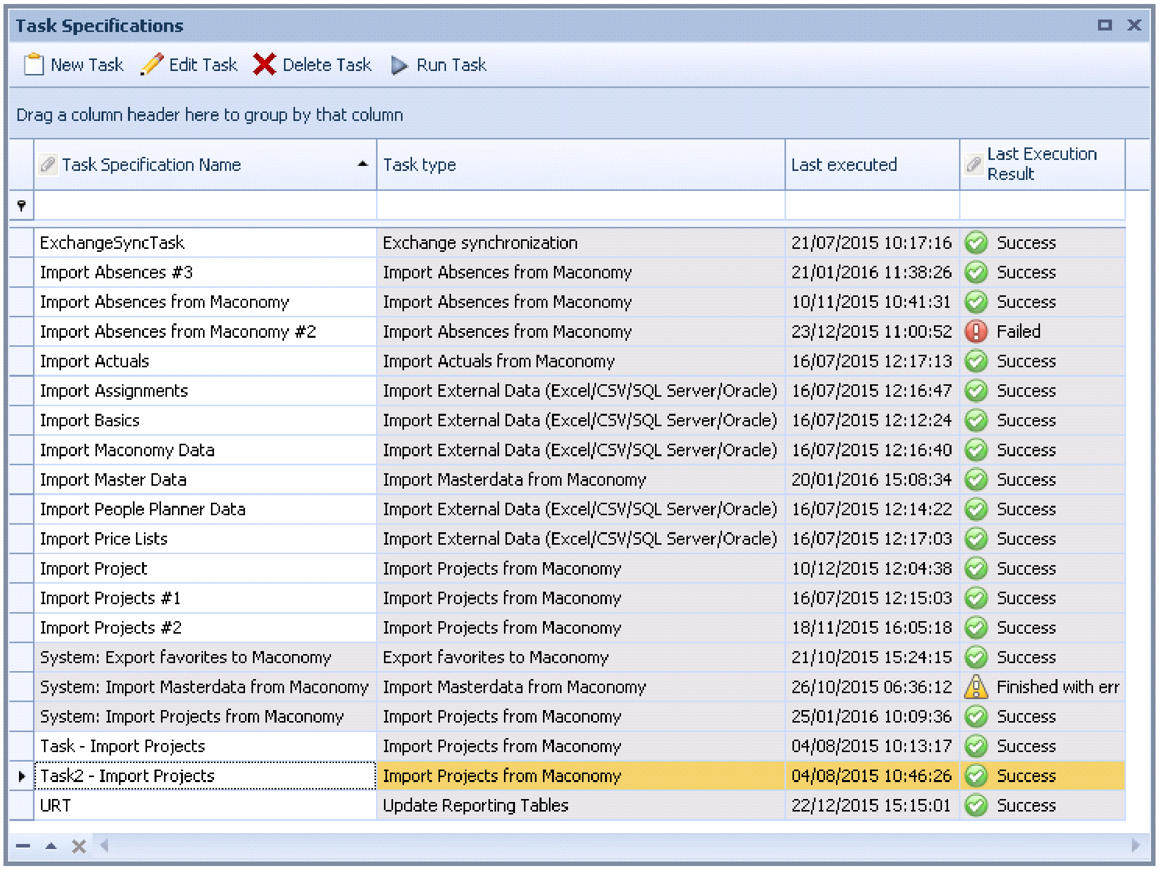
Note: In the cases where the Task Specification builds on top of an Import Mapping, the data can also be imported manually directly from the Import Mapping.

As described previously, either the People Planner Windows application or the People Planner Service performs the import. The following sections use the term "People Planner" when it is not important which one it happens to be.

Task Specifications

The Task Specification is the motor for (almost) all imports of data. The term "Task Specification" is often shortened to just "Task."

You can see the current Task Specifications by navigating to the Task Specifications view via **Views » Tasks » Task Specifications**.



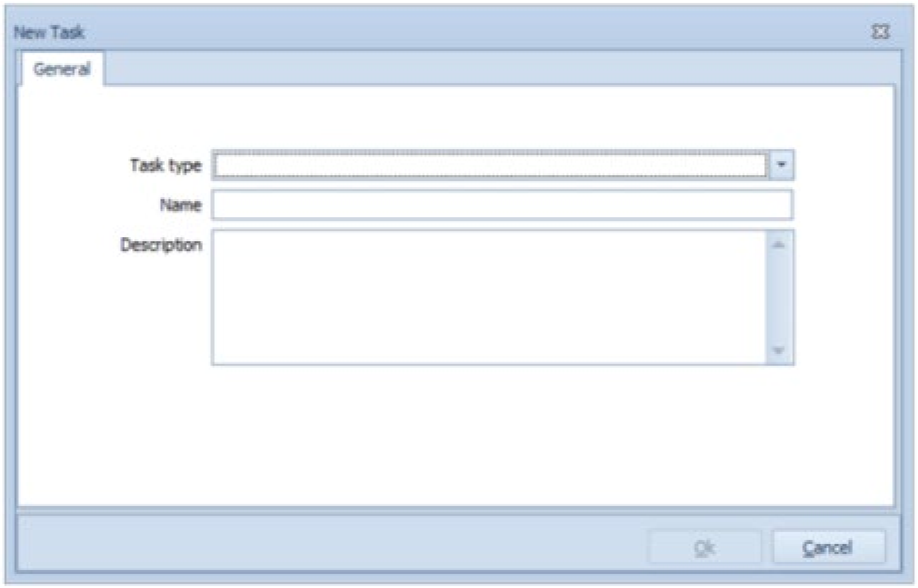
Task Specification Name	Task type	Last executed	Last Execution Result
ExchangeSyncTask	Exchange synchronization	21/07/2015 10:17:16	Success
Import Absences #3	Import Absences from Maconomy	21/01/2016 11:38:26	Success
Import Absences from Maconomy	Import Absences from Maconomy	10/11/2015 10:41:31	Success
Import Absences from Maconomy #2	Import Absences from Maconomy	23/12/2015 11:00:52	Failed
Import Actuals	Import Actuals from Maconomy	16/07/2015 12:17:13	Success
Import Assignments	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:16:47	Success
Import Basics	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:12:24	Success
Import Maconomy Data	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:16:40	Success
Import Master Data	Import Masterdata from Maconomy	20/01/2016 15:08:34	Success
Import People Planner Data	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:14:22	Success
Import Price Lists	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:17:03	Success
Import Project	Import Projects from Maconomy	10/12/2015 12:04:38	Success
Import Projects #1	Import Projects from Maconomy	16/07/2015 12:15:03	Success
Import Projects #2	Import Projects from Maconomy	18/11/2015 16:05:18	Success
System: Export favorites to Maconomy	Export favorites to Maconomy	21/10/2015 15:24:15	Success
System: Import Masterdata from Maconomy	Import Masterdata from Maconomy	26/10/2015 06:36:12	Finished with err
System: Import Projects from Maconomy	Import Projects from Maconomy	25/01/2016 10:09:36	Success
Task - Import Projects	Import Projects from Maconomy	04/08/2015 10:13:17	Success
Task2 - Import Projects	Import Projects from Maconomy	04/08/2015 10:46:26	Success
URT	Update Reporting Tables	22/12/2015 15:15:01	Success

At the top of this view are three buttons to maintain Task Specifications (**New Task**, **Edit Task**, and **Delete Task**) and a button to execute a task (**Run Task**).

Button	Description
New Task	Click to create a Task Specification.
Edit Task	Select one of the existing Task Specifications and click the **Edit** button to edit an existing task.
Delete Task	Select one of the existing Task Specifications and click the **Delete** button to delete the selected Task Specification(s). A confirmation message prompts you to accept or cancel the deletion. **Note:** You cannot delete a Task Specification if it is currently used in a scheduled task. If it has ever been used to import data, its log is also deleted.
Run Task	Click to immediately execute the task directly from the People Planner application. **Note:** You can execute any of the non-system Task Specifications (defined by its Task Type and Parameters) with this option. However, you can only execute System Task Specifications using the ribbon buttons. See System Task Specification.

Create a Task Specification

To create a Task Specification, click the **New Task** button. This opens the New Task view. In this view, you start by selecting the type of task and giving it a descriptive text. You can also add a description of what the task does.



When creating a Task Specification, you can choose from the following task types.

Task Type	Description	For More Information
Batch Task Specification	Bundles together one or more Task Specifications and runs them in sequence, starting the next one when the previous one has finished.	Batch Task Specifications
Delete old log entries	Cleans up the log table by deleting very old log entries. Introduced in People Planner 3.6.1.	Delete Old Log Entries
Exchange Synchronization	Synchronizes bookings and to do's with Exchange and Outlook.	Integration between People Planner and Exchange/Outlook
Export Favorites to Maconomy	Tells Maconomy to create favorites for those resources that have bookings in People Planner.	Export Favorites to Maconomy
Import Absences from Maconomy[2]	Imports absences from Maconomy.	Import Absences from Maconomy to People Planner
Import Actuals from Maconomy	Imports actuals from Maconomy, such as time registrations.	Import Actuals from Maconomy
Import External Data (Excel/CSV/SQL Server/Oracle)	Imports data from an external source such as an Excel or CSV file, or directly from a database such as SQL Server or Oracle.	Import Data from Excel, CSV, SQL Server, and Oracle
Import Incremental Actuals from Maconomy	Imports only actual registrations that were changed or added since the last incremental import.	Import Actuals from Maconomy
Import Master Data from Maconomy	Imports master data from Maconomy	Import Master Data from Maconomy
Import Projects[3] from Maconomy	Imports and updates projects from Maconomy.	Import Projects from Maconomy

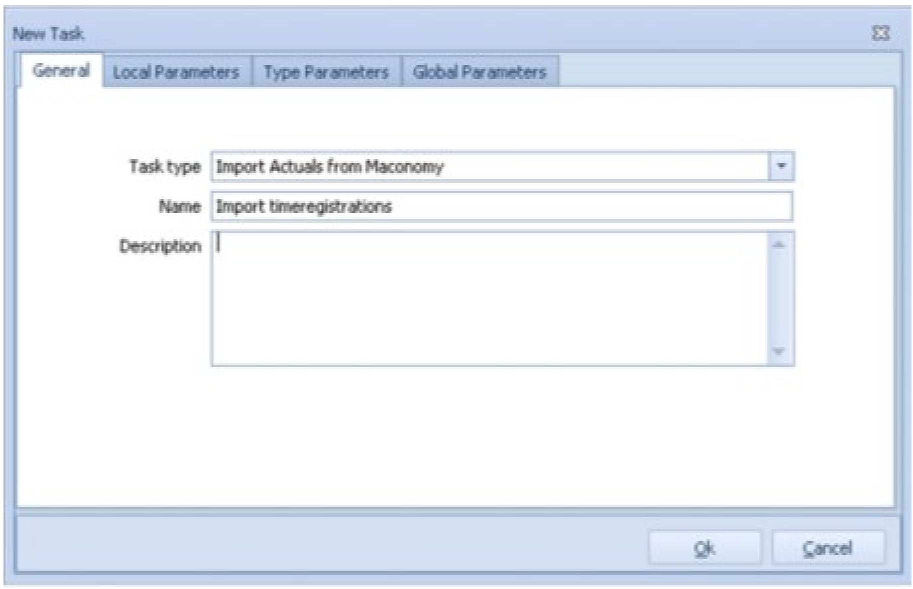
[2] The Import Absences from Maconomy task type was added in People Planner 3.6.
[3] Maconomy uses the term "job," rather than project.

Task Type	Description	For More Information
Update Reporting Tables		[External Views and the Integration with Maconomy BPM]()

The Task Specification holds information about how the task should be executed and has various parameters that determine how data should be handled during the execution. A Task Specification consists of the following components.

Task Specification = Task Type + Local Parameters + Type Parameters + Global Parameters

When you have selected a Task Type, the New Task view updates itself to show these as new tabs. Depending on the exact Task Type, all or only some of the tabs are available.



Parameter	Description
Global Parameters	These settings include items such as the Maconomy URL and Maconomy credentials, and are shared among all of the types of Task Specifications. Global parameters are set using the Admin Tool.
(Task) Type Parameters	These settings apply to a Task Type and are used for all tasks of the specified type. Task Type Parameters are set using the Admin Tool.
Local Parameters	These settings apply to a specific Task Specification and can be set in the People Planner application. The number and type of task parameters depend on the Task Type. For some Task Types (such as the Task Types of the Maconomy Imports), default values can be set for Local Parameters, yet still be changed from within the People Planner application. For the other Task Types, there are no default values, and the values must be set when defining the Task Specification in the People Planner application.

Note: Only the Task Type and the Local Parameters can be edited from the Task Specification. The Type Parameters and the Global Parameters must be edited from the People Planner Admin Tool instead. When the tabs are included in the New Task view it is only for information.

The options in the Local Parameters tab are covered under the individual types of imports later in this section.

Run a Manual Import from a Task Specification

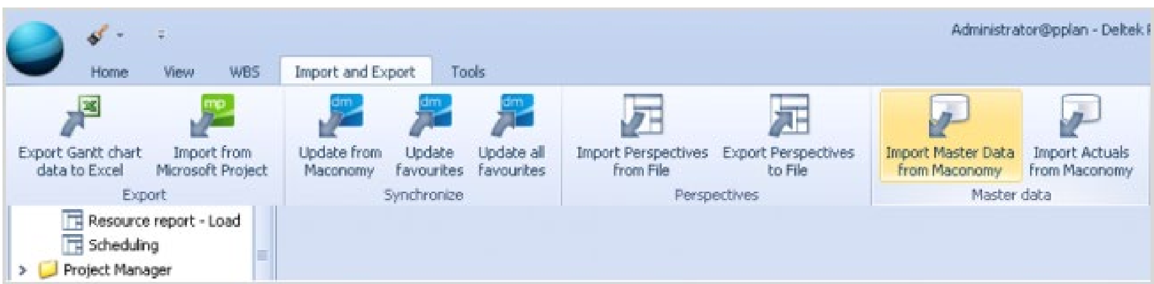
You can run a Task Specification manually.

To run a Task Specification manually:

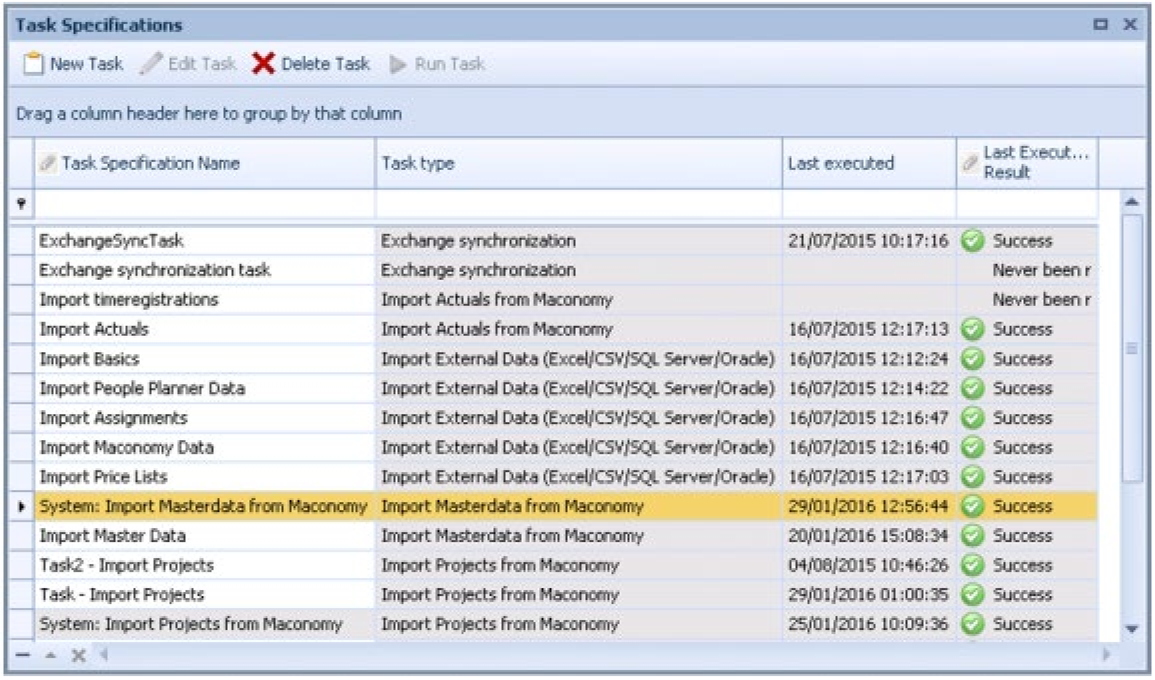
1. Open the Task Specifications view.
2. Select the Task Specification.
3. Click the **Run Task** button.

System Task Specification

You can run some types of imports directly by clicking the **Import Master Data** button on the ribbon.



The first time that you do this, People Planner creates a System Task Specification and then runs that.



Task Specification Name	Task type	Last executed	Last Execut... Result
ExchangeSyncTask	Exchange synchronization	21/07/2015 10:17:16	Success
Exchange synchronization task	Exchange synchronization		Never been r
Import timeregistrations	Import Actuals from Maconomy		Never been r
Import Actuals	Import Actuals from Maconomy	16/07/2015 12:17:13	Success
Import Basics	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:12:24	Success
Import People Planner Data	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:14:22	Success
Import Assignments	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:16:47	Success
Import Maconomy Data	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:16:40	Success
Import Price Lists	Import External Data (Excel/CSV/SQL Server/Oracle)	16/07/2015 12:17:03	Success
System: Import Masterdata from Maconomy	Import Masterdata from Maconomy	29/01/2016 12:56:44	Success
Import Master Data	Import Masterdata from Maconomy	20/01/2016 15:08:34	Success
Task2 - Import Projects	Import Projects from Maconomy	04/08/2015 10:46:26	Success
Task - Import Projects	Import Projects from Maconomy	29/01/2016 01:00:35	Success
System: Import Projects from Maconomy	Import Projects from Maconomy	25/01/2016 10:09:36	Success

A System Task Specification has a few restrictions when compared to Task Specifications that you create yourself:

- It cannot be run manually, except by clicking the original button.
- It cannot be used for defining a scheduled task.

Batch Task Specifications

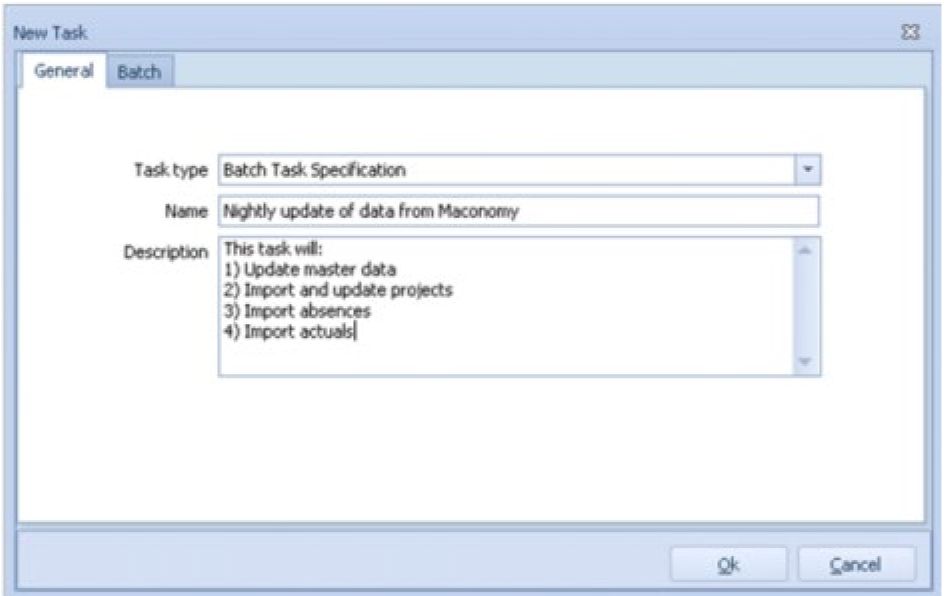
Often you need to run several tasks, one after the other and in a specific order. An example could be to run a nightly set of tasks:

1. Update Master Data from Maconomy
2. Import and update Projects
3. Import Absences
4. Import Actuals

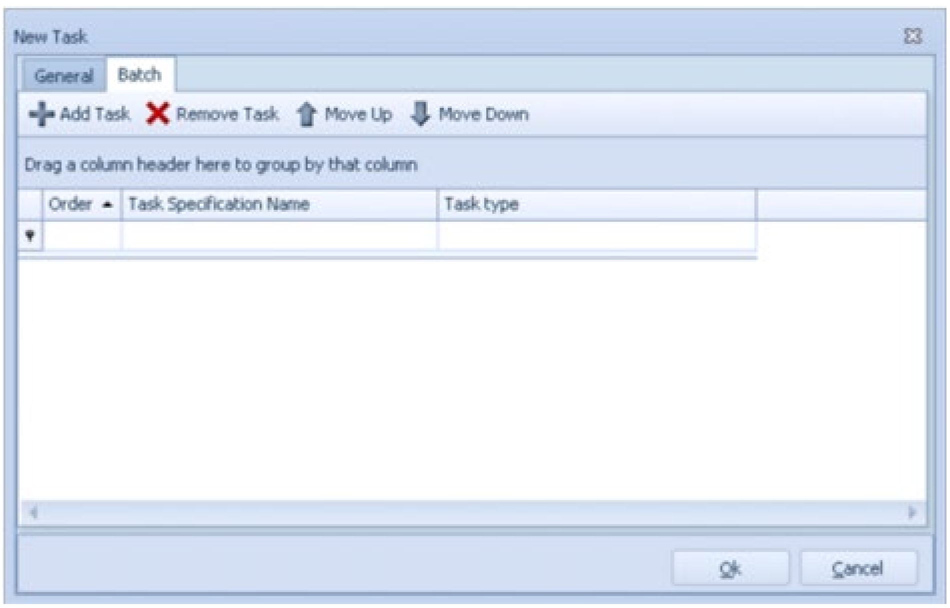
You can achieve this by specifying four Task Specifications, and then four Scheduled Tasks to run them. Often you do not know how long a task will take to complete, and therefore you will need to time your scheduled tasks conservatively to ensure that the previous task has completed well before the next is due to start. The problem with this is that there would then be a long time span between the tasks where the server is idling.

The use of Batch Task Specifications enables you to group Task Specifications and run them in order. If any one of the component Task Specifications in a Batch Task Specification fails, the execution of the Batch Task Specification stops.

You create a batch task in the same way as other Task Specifications and by setting the Task Type to Batch Task Specification.



Give the task a descriptive name, then navigate to the Batch tab to configure which tasks the batch will run.

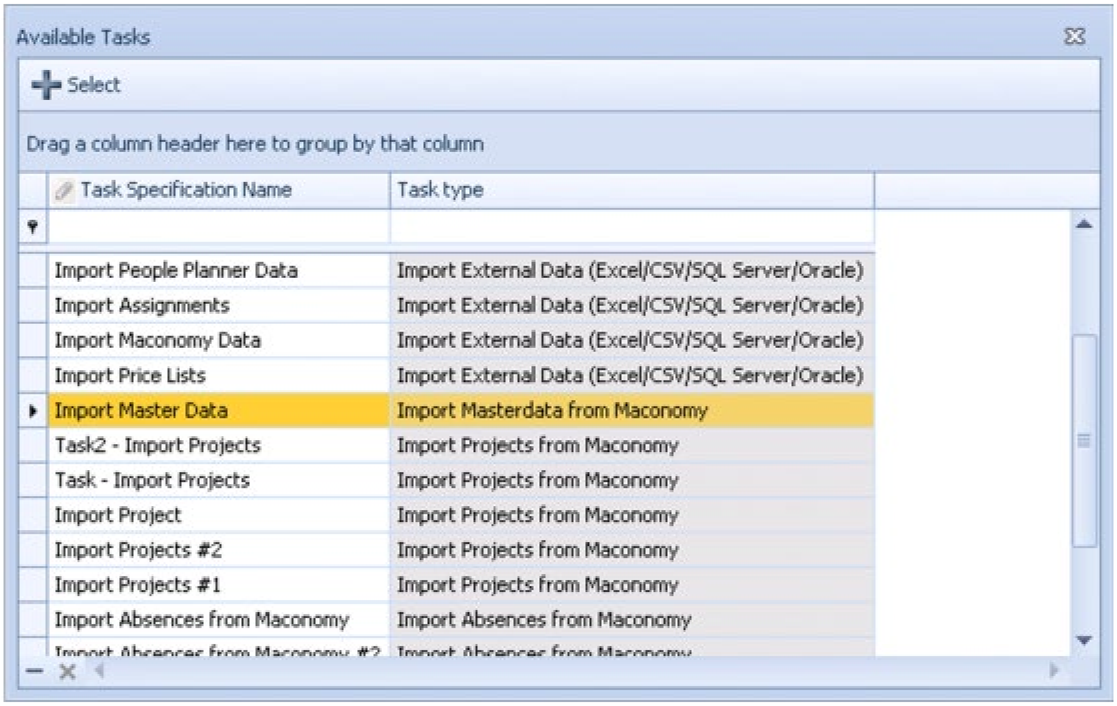


The Batch tab has four buttons at the top. The following table describes them.

Button	Description
Add Task	Click this button to add a new task to the end of the list of tasks currently in the batch.
Remove Task	Select the item that you want to remove and click this button to remove it from the list. The original Task Specification is not deleted; you can add it again if you wish.

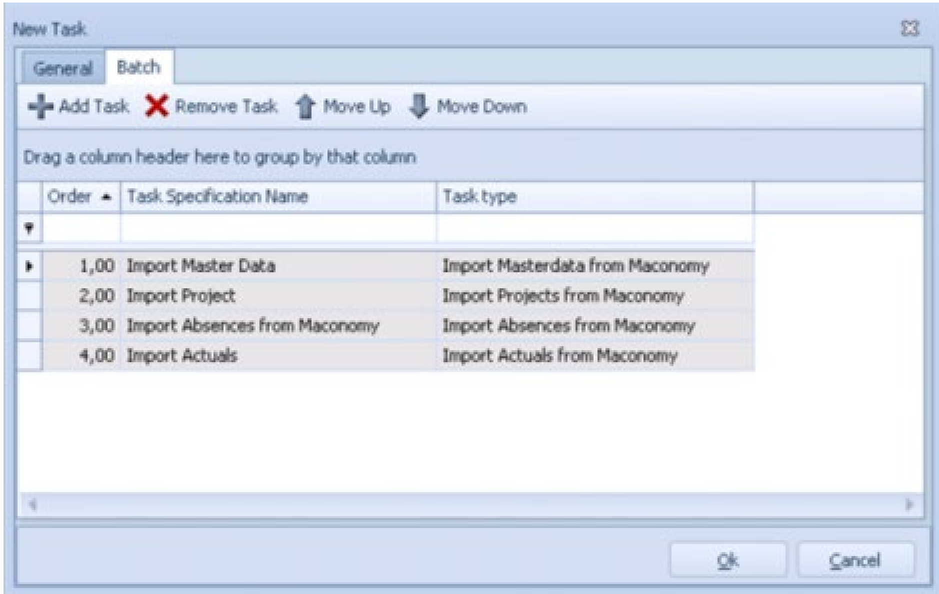
Button	Description
Move Up **Move Down**	The tasks on the list are run from the top to the bottom. To reorder the list, select the item that you want to move up or down, and then click these buttons.

When you click the **Add Task** button, a list of the existing Task Specifications is displayed. Select the one that you want to add, and then click the **Select** button.



Note: < You cannot nest a Batch Task Specification within another Batch Task Specification. The same Task Specification can only appear once in a particular Batch Task Specification.

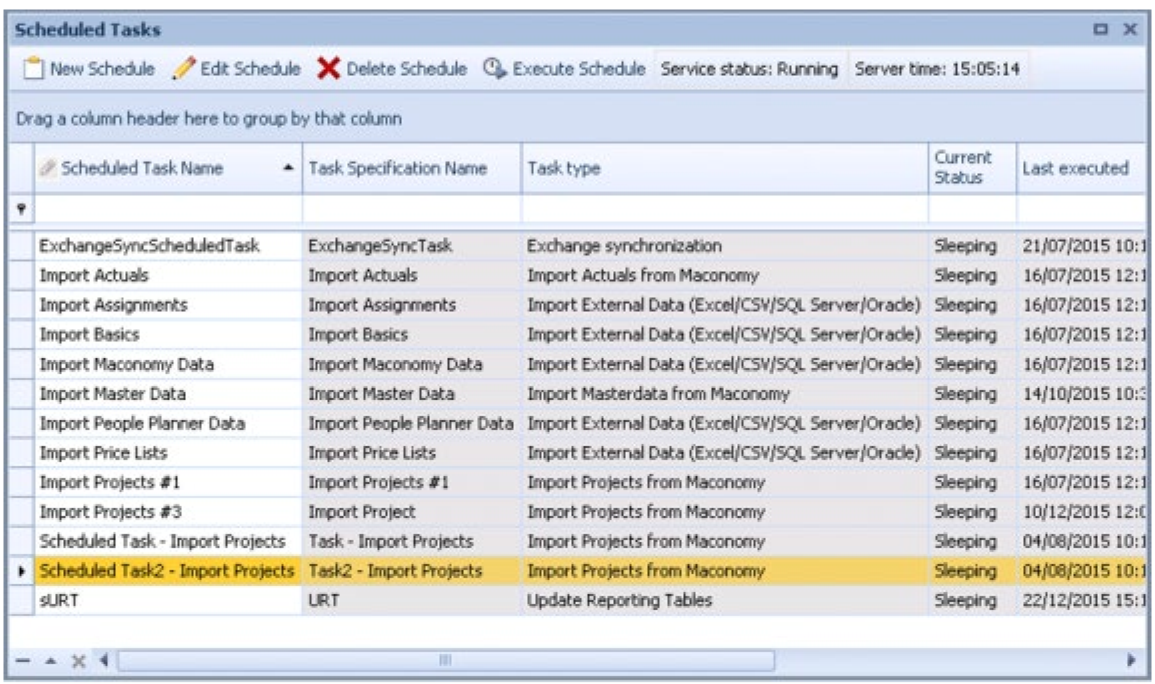
Continue in this way until you have added all of the required Task Specifications.



Scheduled Tasks

A scheduled task adds a scheduling part to a Task Specification. You can run Task Specifications manually. However, if you want to automate a task so that it runs at a set time, such as during the night when the system is otherwise idle, you can create a scheduled task.

You can see the current scheduled tasks by navigating to the Task Specifications view via **Views » Tasks » Scheduled Tasks**.

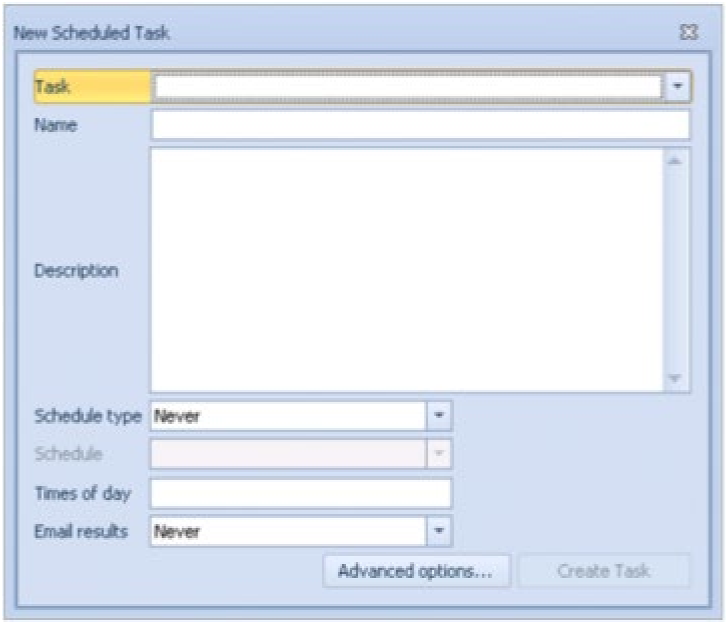


The following buttons are located at the top of this view to maintain scheduled tasks.

Button	Description
New Schedule	Click to schedule a task defined by its Task Specification.
Edit Schedule	Click to edit an existing schedule.
Delete Schedule	Click to delete the selected task schedule(s). A confirmation message allows you to accept or cancel the deletion. **Note:** A scheduled task cannot be deleted if it has ever been used to import data.
Execute Schedule	Click to schedule the task to be run immediately by the People Planner Service.

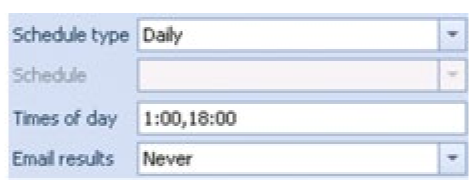
Create a Scheduled Task

To create a scheduled task, click the **New Schedule** button. The New Scheduled Tasks view opens. To begin, select the Task Specification that you want to schedule. You give the schedule a descriptive name, and you can add a description for what the task does.

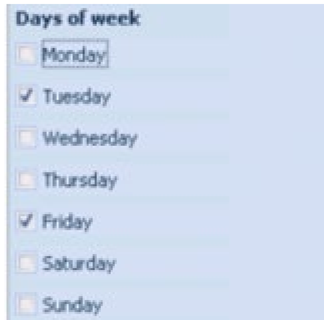


Tip: You can reuse a Task Specification in more than one scheduled task.

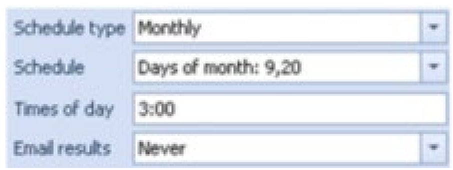
Next, you must select a schedule type that determines when the scheduled task runs.

Schedule Type	Description
Never	Do not run the scheduled task. You can still run the scheduled task manually, but it does not run automatically.
Daily	Run the scheduled task at a preset time every day. You can set more than one time by separating times with commas.  This schedule type is useful for tasks that must run every night.
Weekly	Run the scheduled task on preset days during the week. 

<table>
<tr><th>Schedule Type</th><th>Description</th></tr>
<tr><td></td><td>
Setting the Schedule field value opens a small dialog where you can select one or more days.

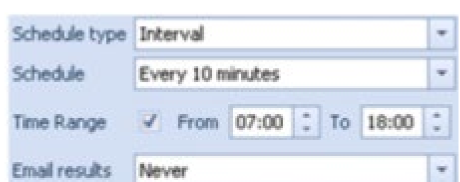


This schedule type is useful for tasks that should be run during the weekend, for example.
</td></tr>
<tr><td>Monthly</td><td>
Run the scheduled task on preset dates during the month.



Setting the Schedule field value opens a small dialog with a calendar.

Last day of month is a special value that varies with the length of the month. If you use this, you do not need to cautiously set the date to “28” if you want the job to run toward the end of every month.
</td></tr>
<tr><td>Interval</td><td>
You can use this schedule type to run a scheduled task frequently to ensure that data in People Planner and Maconomy is in synch.



Beginning with People Planner 3.6, you can set a Time Range value. This example shows a scheduled task that runs every 10 minutes during the working hours (plus a small margin). By not running this scheduled task outside the working hours, this time can
</td></tr>
</table>

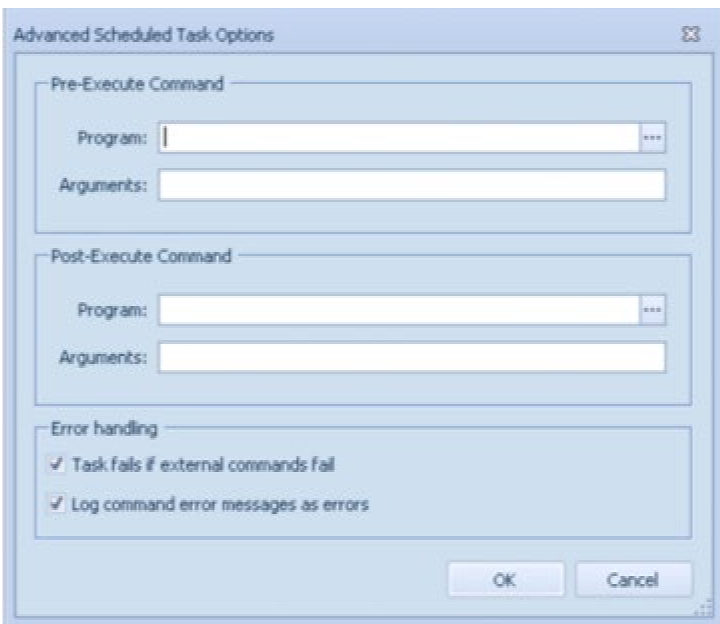
Schedule Type	Description
	instead be used for other maintenance purposes, such as performing backups.

Finally, you can configure when to receive an e-mail whenever a scheduled task has run. See E-Mail Notification when a Scheduled Task Fails for more about this option.

Advanced Options

The capabilities of a scheduled task are defined by the task it belongs to, but sometimes this is not enough. Clicking the **Advanced Options…** button opens a dialog where you can specify external programs to run before and after the scheduled task itself.

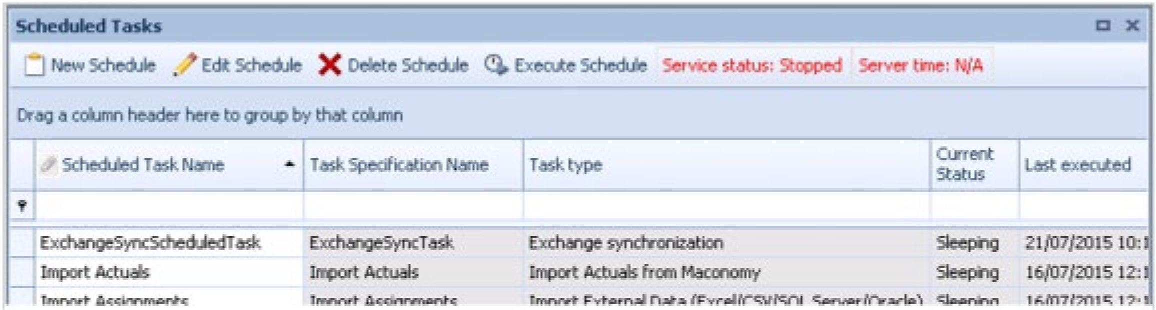
> **Note:** Beginning with Release 3.8.6, the external program must be included in a whitelist of executables that are allowed to run as pre- and post-executables, specified in the People Planner Service configuration file. See the configuration file for details.



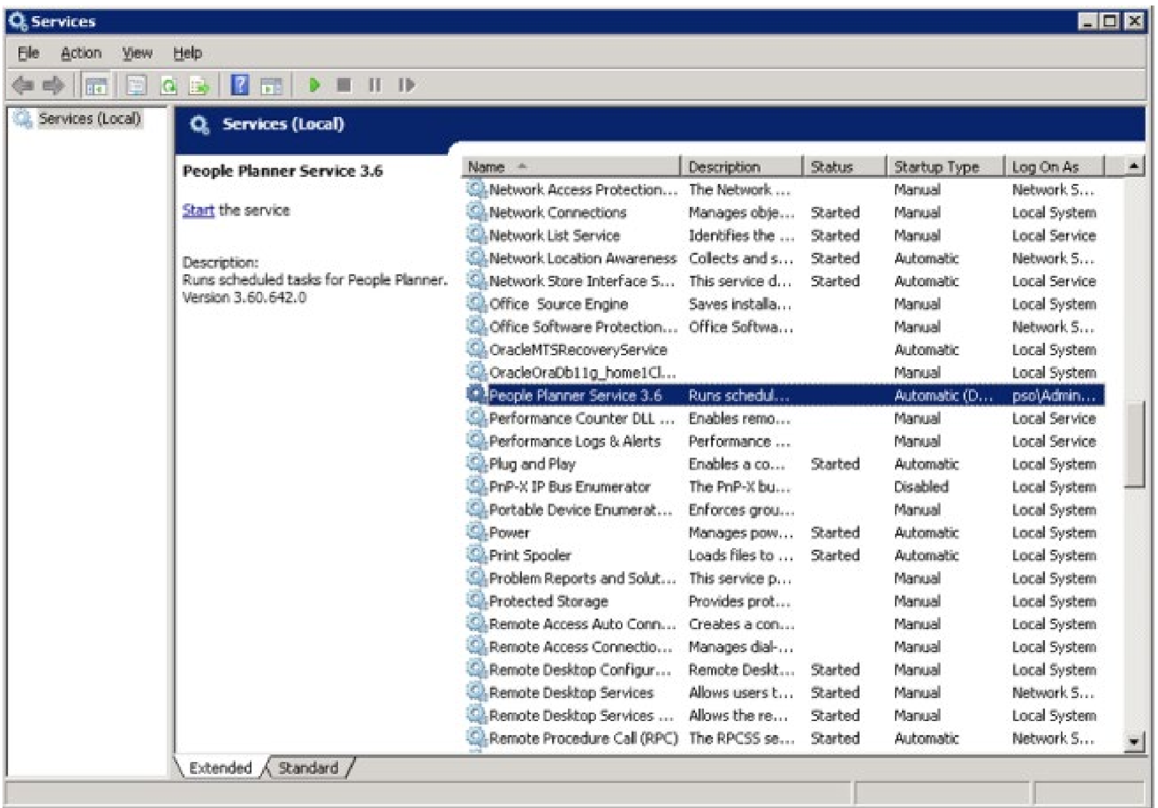
For example, you can use this to run some SQL-statements against the People Planner database or to move some files into their correct place on the file system. However, it is up to you to find or construct such programs.

People Planner Service

The Scheduled Tasks view indicates whether the People Planner Service is running. If this service is not running, People Planner cannot execute the scheduled tasks.



An alternative way to verify if the People Planner Service is running is by checking it directly under services in Windows.



This is also where you restart the People Planner Service if it has stopped.

The People Planner Service is responsible for running scheduled tasks. The following is the general process flow of this service:

1. When a scheduled task is created, it is added as a record in the ScheduledTaskBase table in the People Planner database. This record has a column, NextExecution, which specifies when the scheduled task is scheduled to run the next time.
2. The People Planner Service has a sleep-cycle where it sleeps for 1 minute, and then awakens. When it awakens:
    a. It examines all of the records in the ScheduledTaskBase table and compares the value of the NextExecution against the current time.
    b. If there are any scheduled tasks that should be run, it creates a record—a task execution—in the ScheduledTaskExecution table in the People Planner database.

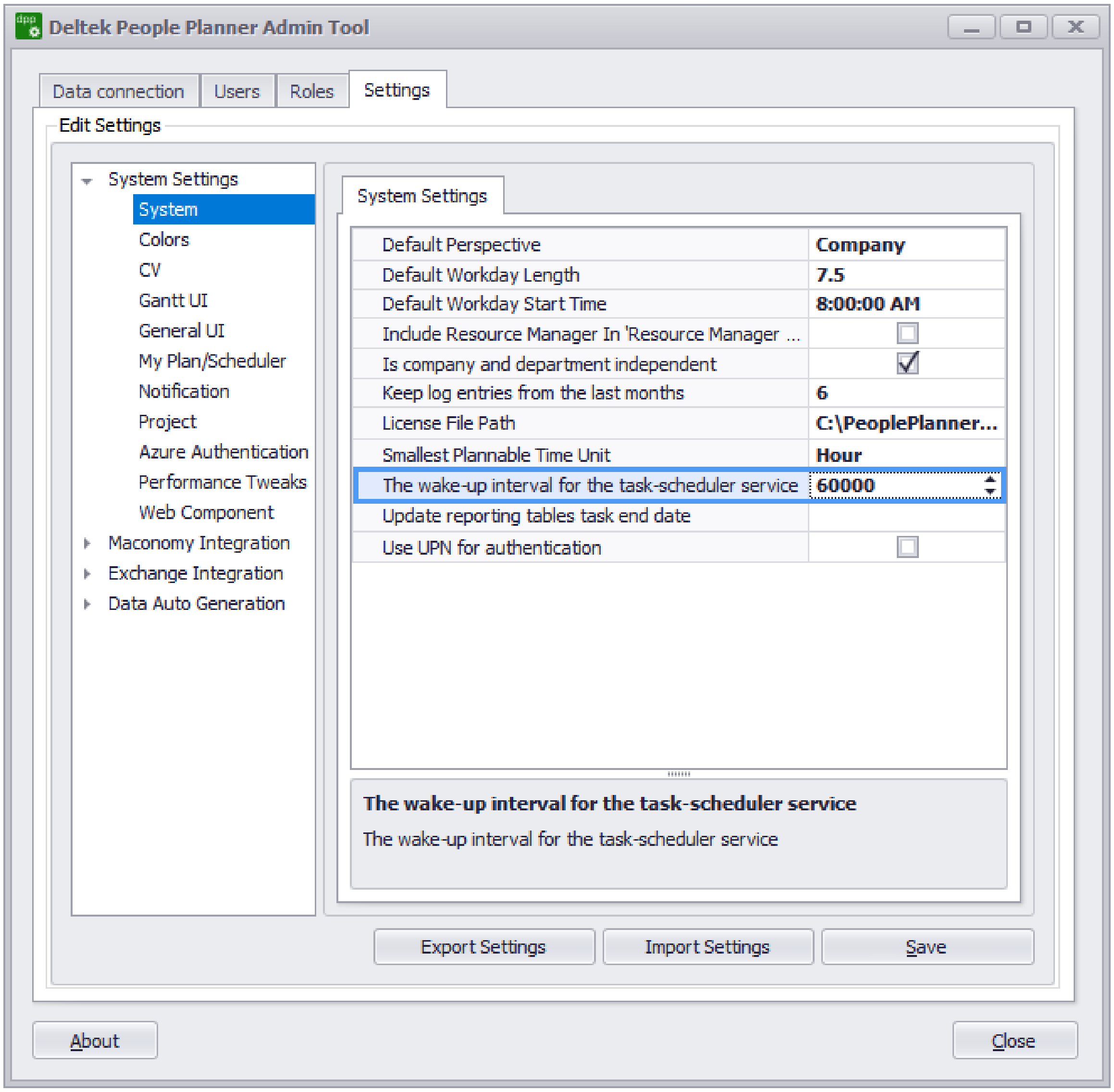
c. It then runs all of the task executions.

d. When a Task-Specification has been run, the Status column is updated with the result of the execution: Failed, Finished with errors, or Passed.

e. Finally, it updates the NextExecution for the scheduled task based on the values under its Schedule Type.

3. When the People Planner Service has run all of the pending tasks, it goes back to sleep.

You can configure the length of the People Planner Service sleep-cycle in the People Planner Admin Tool. The default is 60000, which translates to 60*1000 ms = 60 seconds = 1 minute.



Run a Manual Import from a Scheduled Task

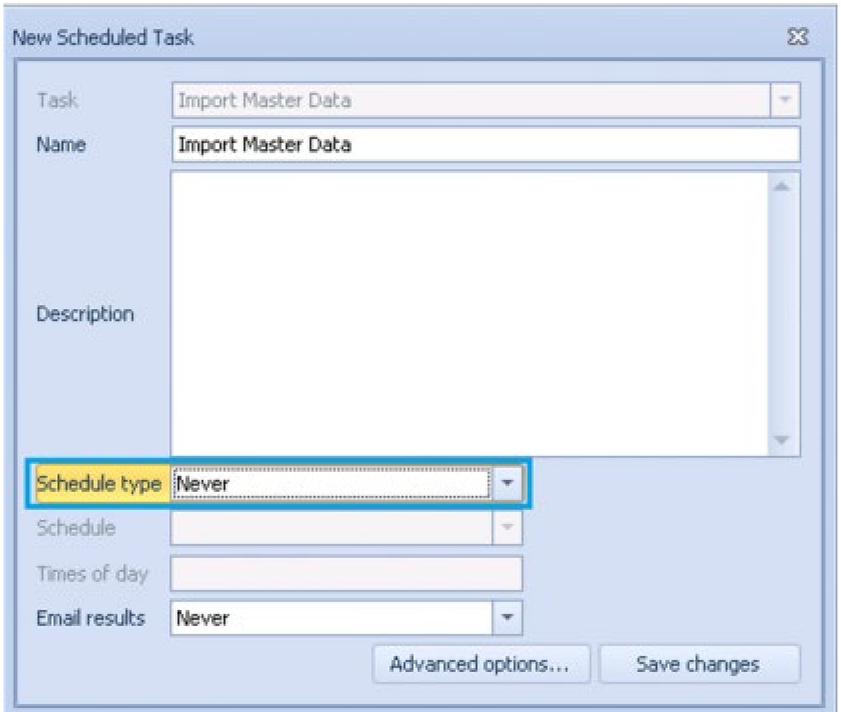
You can run a scheduled task manually by clicking the **Execute Schedule** button.

When you do this, People Planner sets the NextExecution for the scheduled task to “now.” When the People Planner Service awakens, it sees that the scheduled task needs to be run and creates a task execution for this.

Afterwards, the People Planner Service updates the NextExecution for the scheduled task based on the values under its Schedule Type. This might even be "Never."

The value of a manual run is that it runs the scheduled task now instead of forcing you to wait until later. This is useful for things like validating that the scheduled task works correctly, and it enables you to perform troubleshooting if it does not. Alternatively, you can use it to have some data imported right now instead of later.

Troubleshooting: Setting the Schedule type field for a scheduled task to "Never" is particularly useful when combined with doing a manual run.



- The scheduled task runs exactly when you want it; it is not necessary to wait until the next normally scheduled run time.
- It validates whether the People Planner Service can run the import.
- The job only runs once, and you have time to inspect the imported data without worrying that the import will run again in the middle of this.

When you have validated the import, you can then set the Schedule Type to the correct value.

Automated Import from a Scheduled Task

This is the type of scenario for which scheduled tasks are intended.

In this case, it is solely up to the People Planner Service to update the NextExecution for the scheduled tasks.

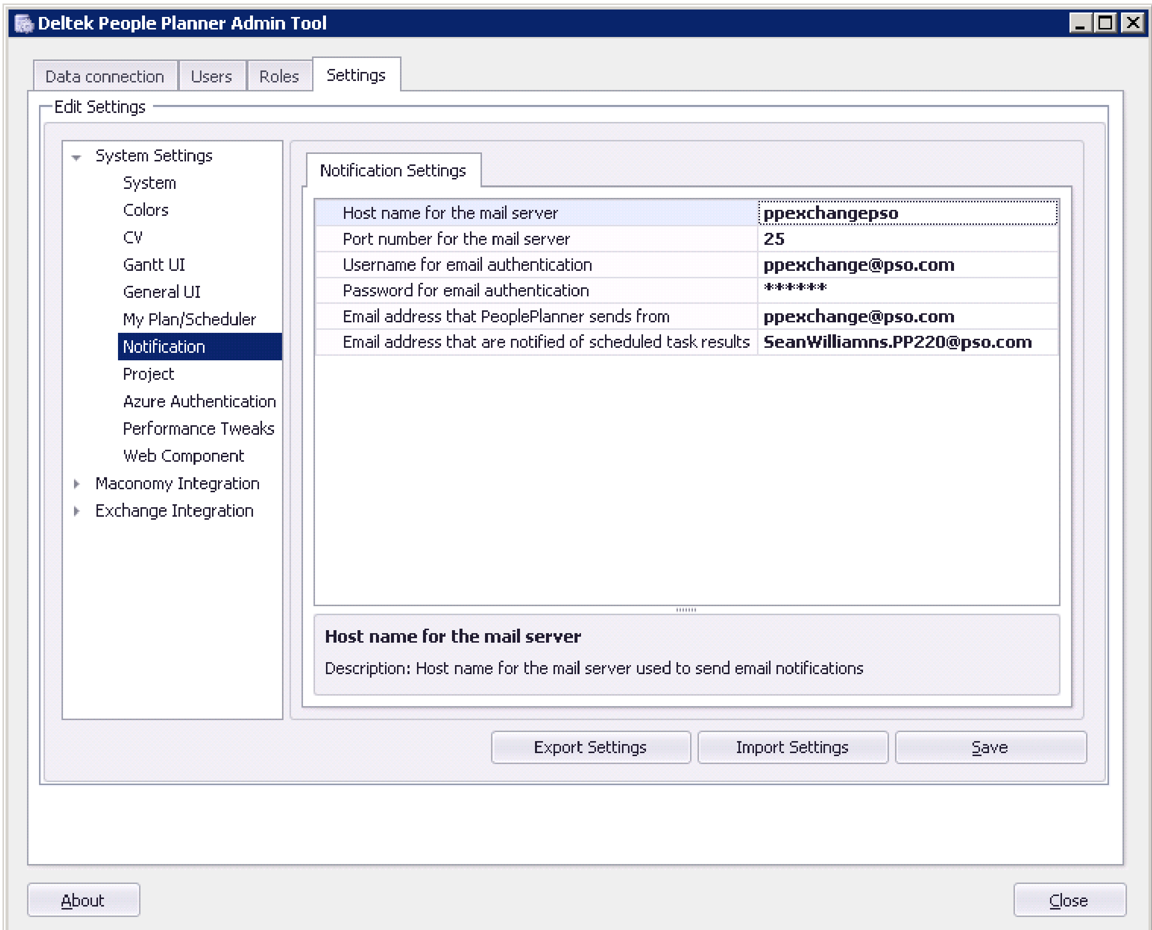
E-Mail Notification when a Scheduled Task Fails

You can configure People Planner to send an e-mail when a scheduled task fails.

To perform the setup to send an e-mail when a scheduled task fails:

1. Open the People Planner Admin Tool.

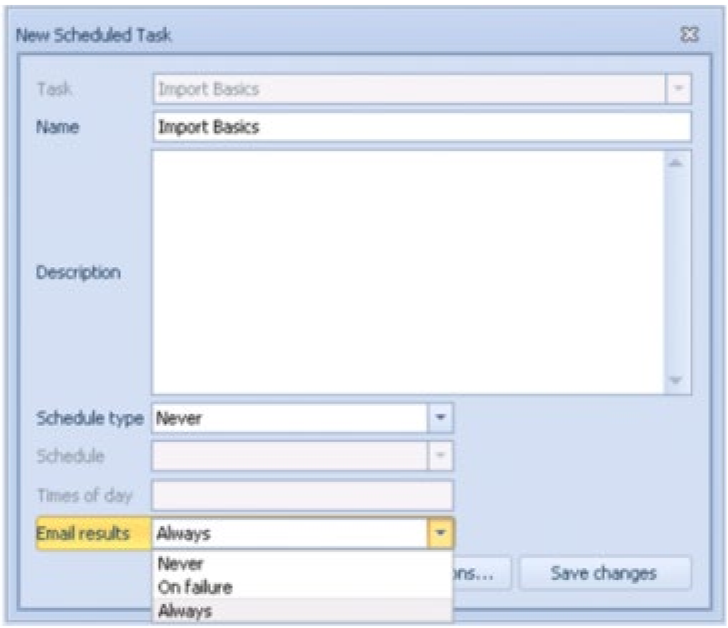
2. Connect to the People Planner database.
3. Navigate to the **Settings** tab.
4. Navigate to **System Settings** » **Notifications**.
5. Fill in the fields and click **Save**.
6. Restart the People Planner service to force it to read the changed settings.



Setting	Description
Host name for the mail server	The name of the mail server that is used to send the mail.
Port number for the mail server	The port-number used on the server. The default is to use the normal SMTP port, 25.
Username for e-mail authentication	Login credentials for the mailbox that is used to send the e-mail.
Password for e-mail authentication	
E-mail address that People Planner sends from	The From address on the e-mail. It is recommended that you set this to a “No reply” e-mail address.

Setting	Description
E-mail address that is notified of scheduled task results	The e-mail address of the user who needs to investigate and resolve any issues with failing scheduled tasks. You can enter multiple addresses separated by semicolons (;).

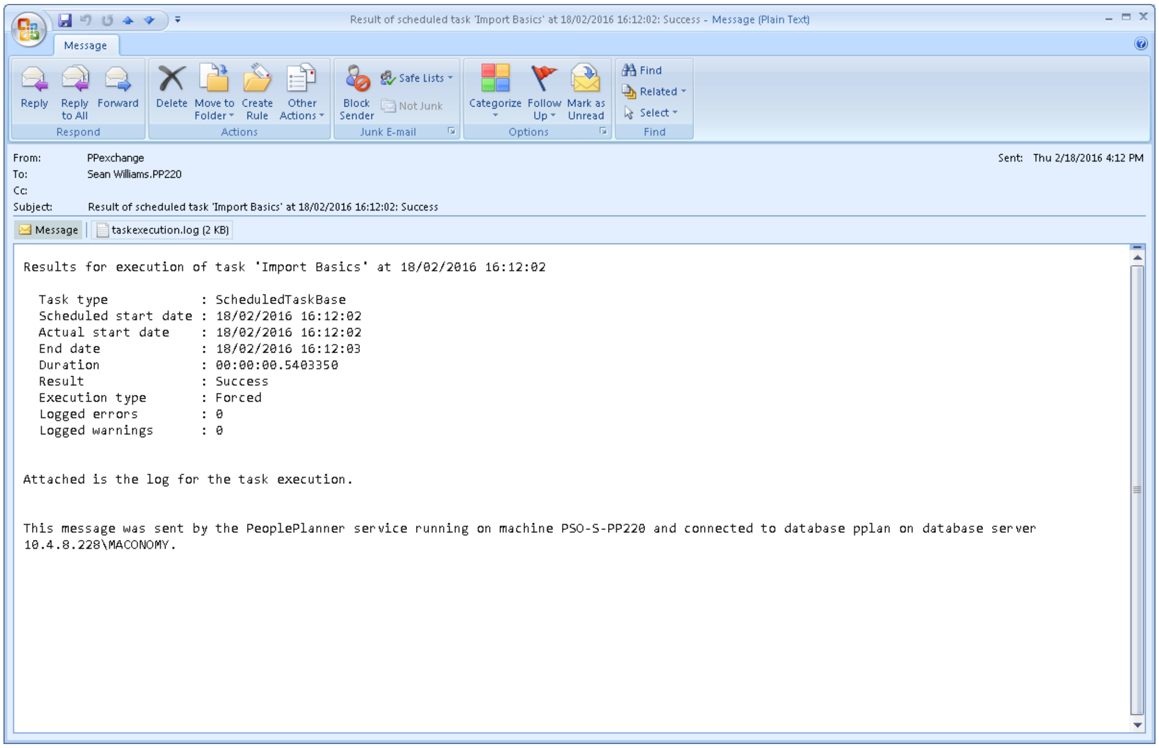
This provides People Planner with the settings for sending e-mails; you must also configure each scheduled task. You do this by selecting an option for the Email results field as shown in the following figure.



Option	Description
Never	No e-mail is sent. This is the default.
On failure	People Planner sends an e-mail if the scheduled task fails.
Always	People Planner sends an e-mail whenever the scheduled task runs.

Note: It can be problematic to set up the system to send an e-mail every time a scheduled task runs. The risk is that you will overlook it the one time that it fails and you need do something about it. This argues against setting it to Always for all of the scheduled tasks. On the other hand, there should always be at least one scheduled task that always sends an e-mail, to ensure that the system can actually send e-mails when it needs to.

In the preceding example, an e-mail is sent to Sean Williams every time that the scheduled task runs.

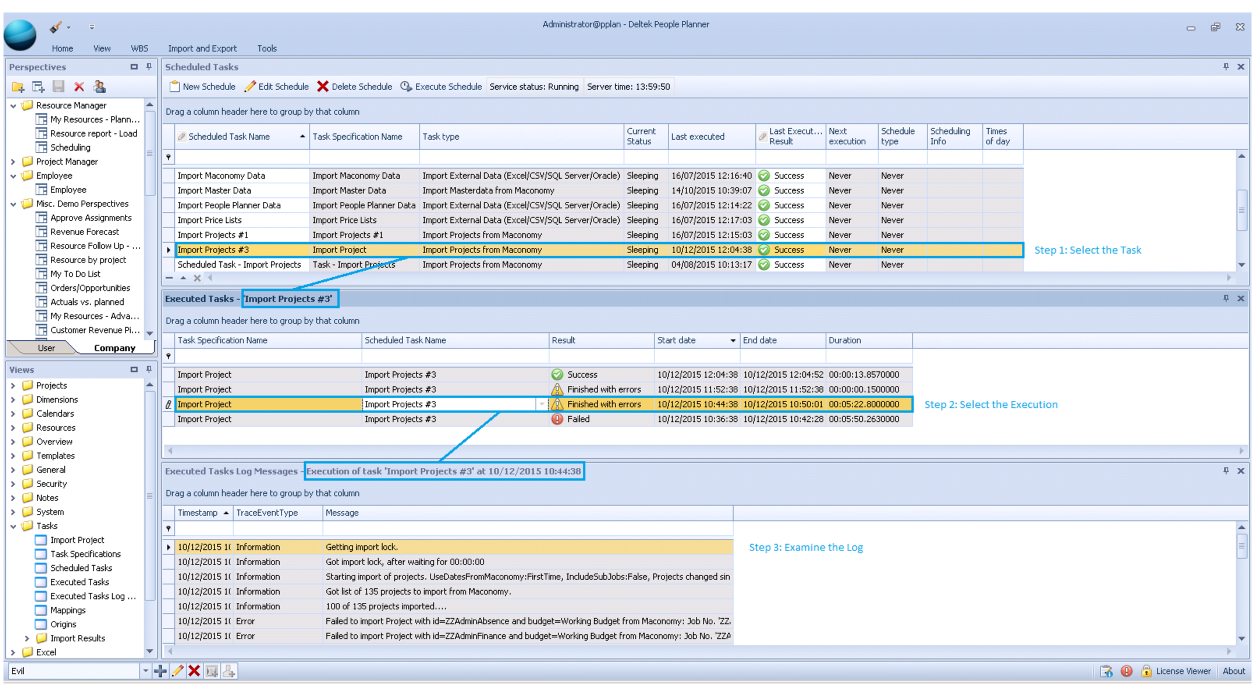


The e-mail provides a summary of the run, and the relevant part of the log is attached.

Execution Logs

Whenever a Task Specification or scheduled task is executed, the result is logged in the Execution Logs.

The following example shows the Scheduled Task view combined with the Executed Task view and the Executed Tasks Log Messages view.



The three views are interconnected:

1. Select the Task Specification / scheduled task in the Task view.

   This causes the Executed Tasks view to be updated with a list of executions for the selected task.

2. Select the execution in the Executed Tasks view.

   This causes the Executed Tasks Log Messages view to be updated with the log for the selected execution.

3. Examine the execution log.

Tip: You should establish a policy of inspecting the logs on a regular schedule. If a problem is allowed to persist for too long, it is usually much more time-consuming to fix it.

Note: The logs are stored in the LogEntry table in the People Planner database. You can consult this table as an alternative to looking in the execution logs.

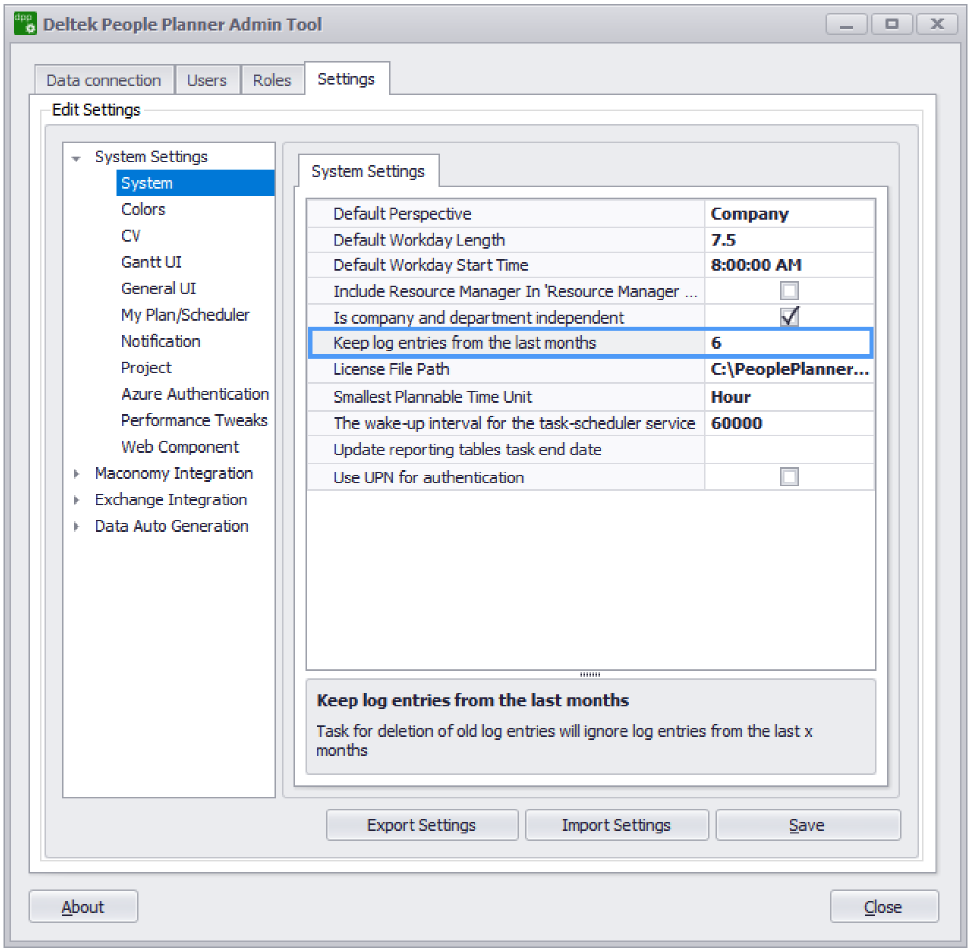
Delete Old Log Entries

People Planner logs it whenever it imports data by running a Task Specification. It also logs when a user deletes resources or events. If these log entries are never deleted, the LogEntry table continues to grow in size. Eventually this becomes a problem.

To solve this, People Planner 3.6.1 introduced the Delete old log entries clean-up task. This task is based on the same Task Specification functionality that is used for importing tasks and is set up in same way.

To configure how far back People Planner should keep its log entries before deleting them:

1. Start the People Planner Admin Tool.
2. Navigate to **System Settings » System**.
3. Set the value of the **Keep log entries from the last months** setting to the appropriate number. This is the number of months back for which you want to retain log entries.



4. Click **Save**.

Log Files

In addition to logging to the database, People Planner also logs to files on the disk. Whereas the execution logs are centered on logging details about the runs, the log files log system information.

Run the Task Specification

You can only do this manually.

When you import data in this way, it is the People Planner Windows application itself that performs the import. The People Planner Windows application therefore logs everything to its own log file. This log file is located in the installation directory for the People Planner Windows application, under Logs:

```
C:\Program Files (x86)\Deltek\People Planner 3.6.1 (406)\Logs
```

Run the Scheduled Task

You can do this either manually or automated, depending on the scheduling.

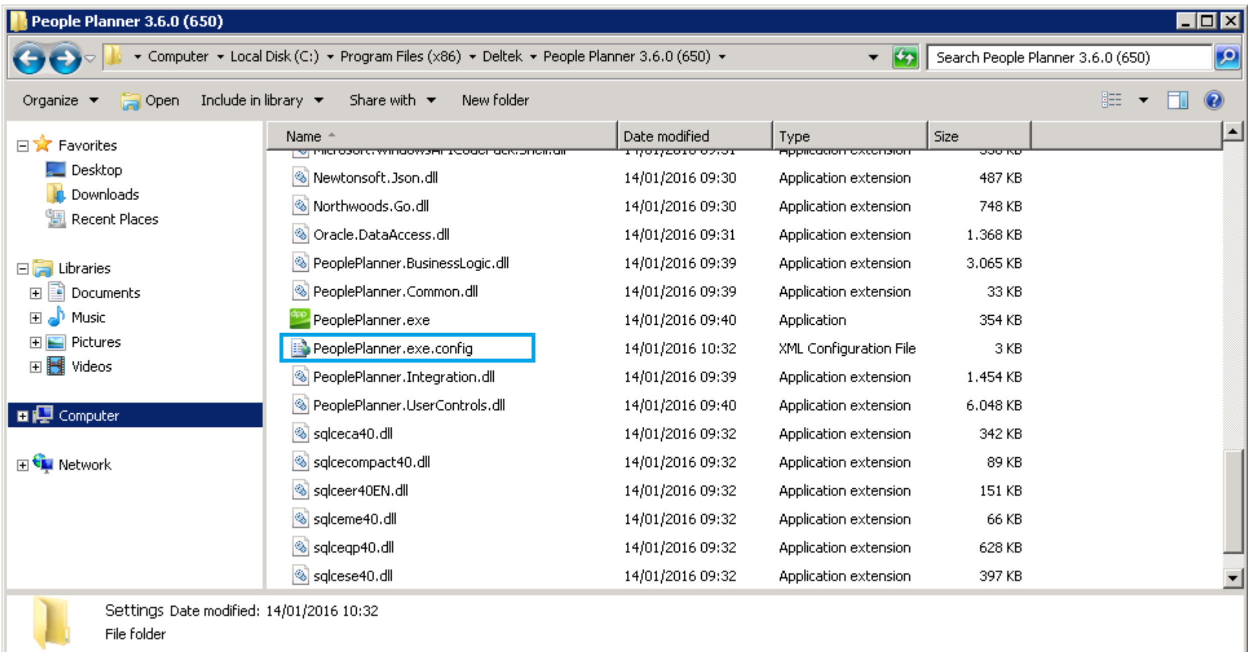
In both cases, it is the People Planner Service that imports the data. The People Planner Service therefore logs everything to its own log file. This log file is located in the installation directory for the People Planner Service, under Logs:

```
C:\Program Files (x86)\Deltek\People Planner Service 3.6\Logs
```

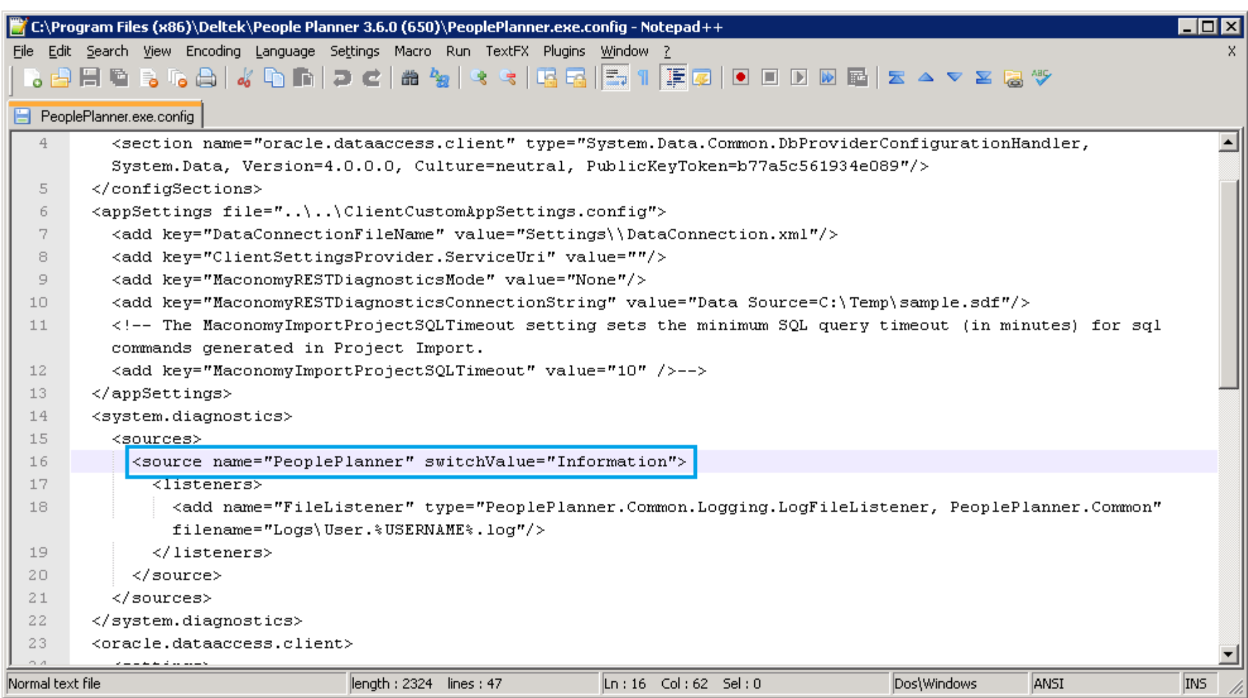
Set the Logging Level

If the default logging does not provide the necessary details, you can instruct People Planner to log more. Edit the config file for either the People Planner Windows application or the People Planner Service, depending on which you are using.

This file is located in the installation directory.



You can edit the config file with any text editor. In the following example, it happens to be Notepad++ but the Notepad that comes with Windows works just fine.



Change the switchValue from "Information" to "Verbose." If you are editing the People Planner Service, you must also restart the service to ensure that it reads the changed configuration details.

Tip: When the problem has been solved, set the value back to "Information" afterwards, or the log file can quickly grow to enormous proportions.

Specify Tasks Using Verbose Logging

You can choose which tasks should use verbose logging upon execution. This is done by enabling the **Force Verbose Logging** local parameter on the task specification. See Tasks for more information about Task Specifications and scheduled tasks.

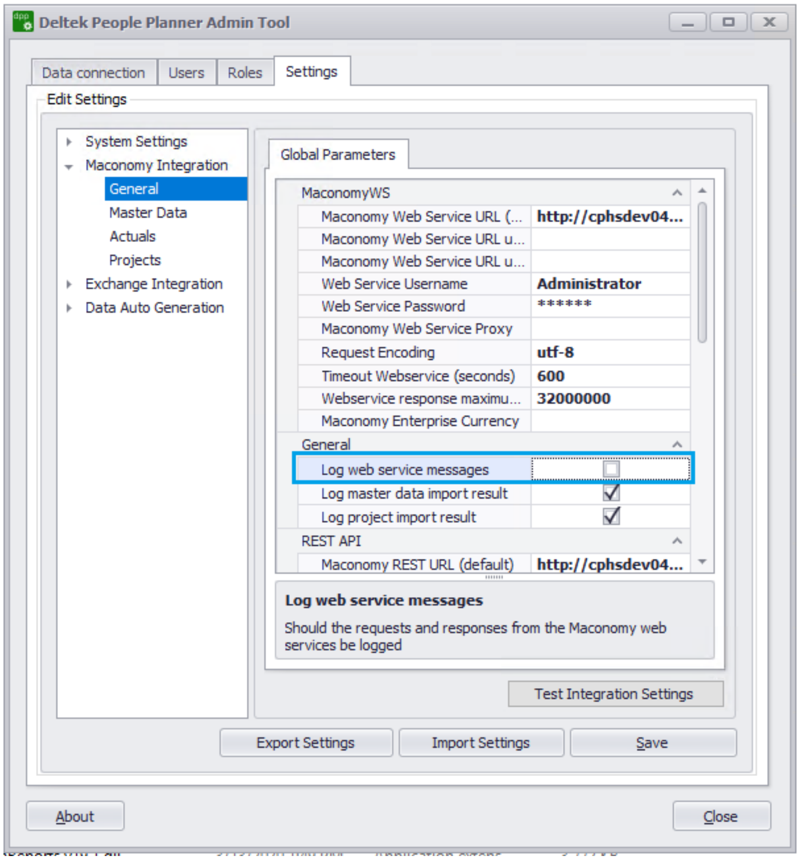
When you enable this parameter on a batch task, all executed tasks in the batch will use verbose logging.

Log Web Service Messages

Normally People Planner only logs a condensed summary of the import. If you need the full history—that is, the actual messages that are passed to and received from Maconomy—you can select the **Log Web Service Messages** checkbox.

Warning: When you are done with your analysis of the problem, you should make sure to deselect the **Log Web Service Messages** checkbox again. You must then restart the People Planner Service to force it to read the changed setting. If you do not do this, the logged messages will very quickly consume a lot of disk space.

You select/deselect this checkbox in the People Planner Admin Tool, where you can find it by navigating to Maconomy Integration **»** General.



When you have selected the checkbox, you must click **Save** and restart the People Planner Service to ensure that it reads the changed setting.

Data-Centric Views

The execution logs concentrate on how the tasks have run and which issues were encountered.

As an alternative to this, People Planner also provides the data-centric views that instead focus on the specific data and its quality. The data-centric views are described with the integration to which they belong.

Updating the data-centric view has a little overhead in performance during the data import. You can disable master data or project data-centric views if you do not use them. Data-centric views for actuals cannot be disabled. See the screenshot above for reference.

Data-Centric View	Description	For More Information
Master Data	What master data was imported, and were there any problems with it?	Data-Centric View for Importing Master Data
Project	Which projects were imported, and were there any problems?	Data-Centric View for Importing Projects
Actuals	Which actuals—that is, time registrations—were imported, and were there any problems?	Data-Centric View for Importing Actuals

Data-Centric View	Description	For More Information
	Note: This is unavailable if you have enabled the **Use REST for Actual Imports** setting.	

Integration between People Planner and Maconomy

The integration between People Planner and Maconomy enables the exchange of data between Maconomy and People Planner. For the most part this data flow goes in the direction from Maconomy to People Planner, but there are a few examples of data moving in the other direction:

- Import master data from Maconomy to People Planner.
- Import projects, including their budgets, from Maconomy to People Planner.
- Push a project, including its budget, from Maconomy to People Planner.
- Export favorites from People Planner to Maconomy.
- Import actuals from Maconomy to People Planner.
- Import absences[4] from Maconomy to People Planner.
- Import ETCs from People Planner to Maconomy.
- Import Periodic Budget from People Planner to Maconomy.

These integrations are described in more detail in Transfer Data between People Planner and Maconomy.

The integration also enables you to embed some of the People Planner web applications in the Maconomy clients:

- MyPlan embedded.
- People Planner Web Component[5].

These integrations are described in more detail in Embedded People Planner Components.

The Software

> **Tip:** See the *Deltek People Planner Technical Installation Guide* for instructions for installing and configuring the People Planner software.

This section lists the People Planner and Maconomy software that is involved in the integration.

People Planner Software

Software	Description
MyPlan	This web application can be embedded in the Maconomy clients. It can also be used directly from a browser.
People Planner Admin Tool	The administrator uses this program to configure People Planner. This document focuses on the

[4] The Absence import was introduced with People Planner 3.6.
[5] The People Planner Web component was introduced with People Planner 3.6, and it has been expanded in People Planner 3.7.

Software	Description
	settings that are relevant for the integration with Maconomy.
People Planner API	Third-party programs that need to integrate with People Planner can use this web service. Maconomy uses it: ▪ When a user pushes a project to People Planner. ▪ For getting ETCs from People Planner. As of People Planner release 3.7, it is also used to get the periodic budget. ▪ When the Maconomy Coupling Service requests an SSI token.
People Planner Windows Application	Among other things, the People Planner Windows application can be used for: ▪ Setting up Task Specifications and Scheduled Tasks. ▪ Running imports manually. ▪ Investigating issues with failing imports.
People Planner Service	This Windows service executes any Scheduled Task according to its predefined schedule. For the integration between People Planner and Maconomy, this means that it: ▪ Calls the MaconomyWS web service. ▪ Calls the Maconomy RESTful web service. Both of these require configuration, which is described in detail later.
People Planner Web Component[4]	This web component can be embedded in the Maconomy Workspace Client (WSC) and the Maconomy web client. In Maconomy, it is called the “People Planner Web Component.” The Web Component cannot be used directly from a browser.

Maconomy Software

Software	Description
Maconomy Coupling Service	Runs as a Windows service on the Windows platform or as a background task[6] on the *NIX platforms. In the integration between People Planner and Maconomy, the Coupling Service is responsible for: ▪ Hosting the Maconomy RESTful web service. ▪ Requesting SSI tokens from People Planner.
Maconomy RESTful Web Service	Third-party programs that need to be integrated[7] with Maconomy can use this web service. People Planner can use it for: • Import of projects and their budgets. • Import of absences. • Import of Customers. • Import of LocalSpecifications4-10 and Specifications4-10.
Maconomy Workspace Client	Although the MyPlan web application can be embedded in all of the Maconomy clients, this document only describes the Maconomy Workspace Client (WSC). The integrations are: ▪ Users can click the **Send to People Planner** button to push the current project and its budget to People Planner. ▪ Users can click the **Update ETC from People Planner** button to import ETCs from People Planner. ▪ Users can click the **Update Resource Allocations from People Planner** button to import the periodic budgets from People Planner. ▪ You can embed MyPlan in this client. ▪ You can embed the People Planner Web Component in this client.
MaconomyWS Web Service	Third-party programs that need to be integrated with Maconomy can use this web service. People Planner uses[8] it for the import of master data, the import of projects and their budgets, the export of favorites, and for the import of actuals.

[6] The Maconomy Coupling Service does not run as a daemon on *NIX.
[7] The Maconomy RESTful web service will eventually replace the older MaconomyWS web service, and the MaconomyWS web service will then be retired from the Maconomy product.
[8] Starting with People Planner 3.6, more and more of these can also be imported using the Maconomy RESTful Web Service.

Other Integrations

As an alternative to using the Maconomy web services for importing data from Maconomy, you have some other options:

- If the Maconomy system can export data in ether Excel or CSV format, you can define Import Mappings to import the data from these files into People Planner.
- Alternatively, you can use Import Mappings to query directly into the Maconomy database—either SQL Server or Oracle.

The first method is probably the more robust with regard to updates of the Maconomy system. If Maconomy changes its database structure, you only need to update the export mechanism as a result.

You can also use these mechanisms to integrate with systems other than Maconomy, such as to import data from an SAP system.

See Import Data from Excel, CSV, SQL Server, and Oracle for a description of Import Mappings.

Core Configuration of the Maconomy Integration

This section describes the basic setup for the two Maconomy web services and for the People Planner components that can be embedded in Maconomy. These are the foundation for the integrations between People Planner and Maconomy.

It is assumed that the software has already been installed. See the *Deltek People Planner Installation Guide* document for details about how to install the software.

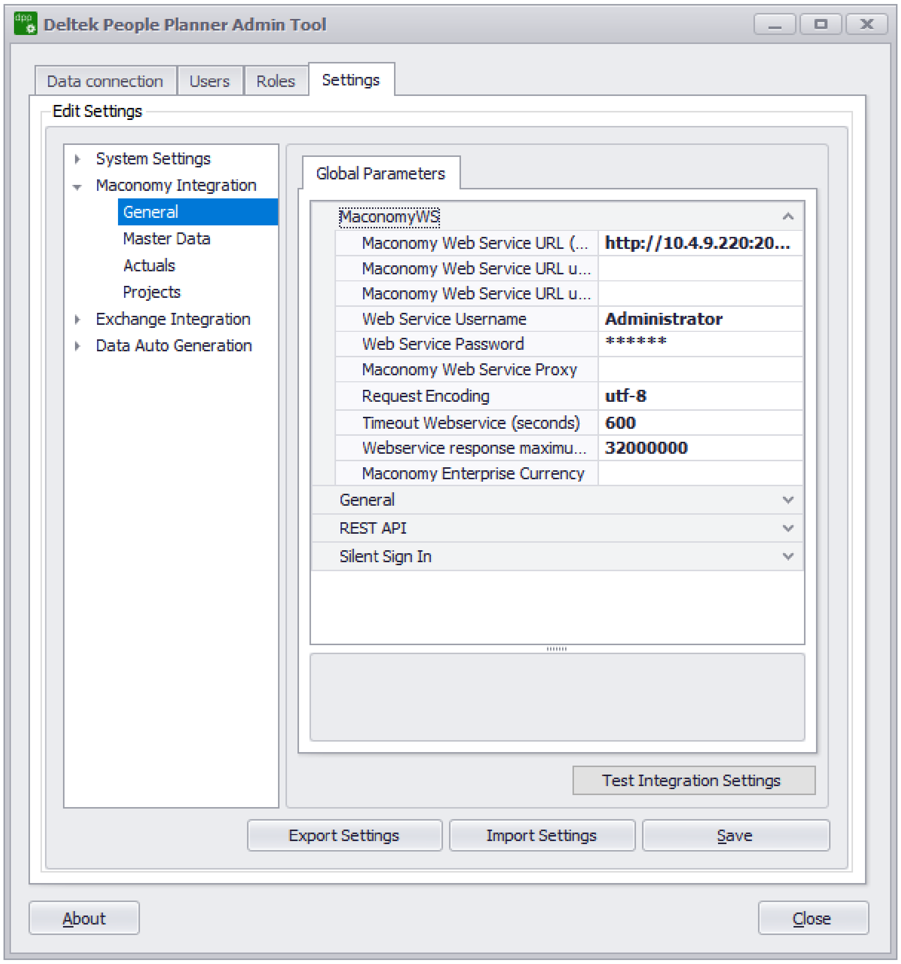
The integrations themselves are described in How the Integrations between People Planner and Maconomy Work.

People Planner Admin Tool

The People Planner settings that relate to the integration with Maconomy are accessible from the People Planner Admin Tool under the Maconomy Integration section.

General Tab

The central settings for how People Planner calls Maconomy are located on the General Parameters tab.



This tab has three sections:

- MScript Web Services
- REST API
- Silent Sign In

The REST API and Silent Sign In sections were introduced in People Planner 3.6.

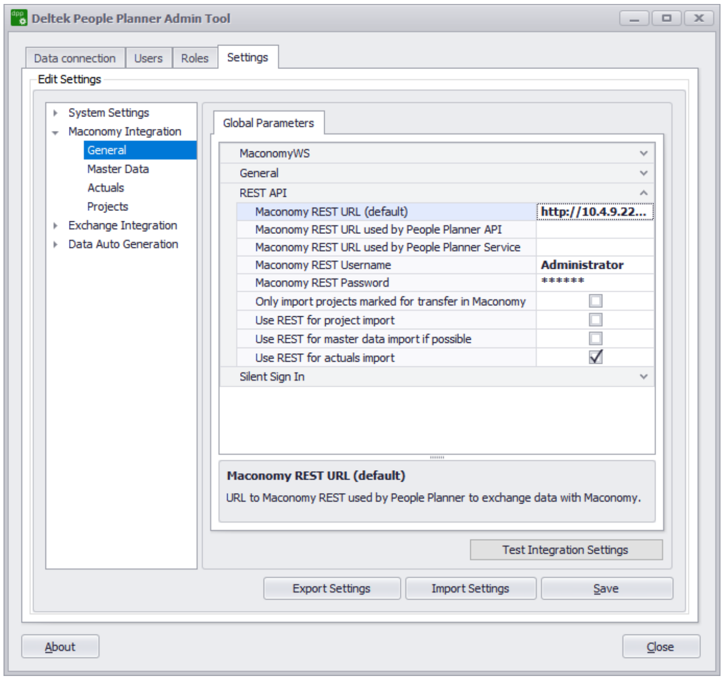
MScript Web Services Section

These are the settings for the MaconomyWS web service. You must provide values for this section even if the Maconomy RESTful web service is the preferred way to import projects. The MaconomyWS web service is still required for other types of imports.

Setting	Notes	For More Information
Maconomy Web Service URL (default)	The URL for the MaconomyWS web service.	MaconomyWS Web Service
Maconomy Web Service URL used by the People Planner API		MaconomyWS Web Service – Alternate URLs
Maconomy Web Service URL used by the scheduling service		MaconomyWS Web Service – Alternate URLs
Web Service Username		MaconomyWS Web Service
Web Service Password		MaconomyWS Web Service
Maconomy Web Service Proxy		
Request Encoding	The default is UTF-8, which supports Unicode. In older setups, it was ISO-8859-1.	Other MaconomyWS Settings
Timeout Webservice (seconds)		Other MaconomyWS Settings
Webservice response maximum size (bytes)		Other MaconomyWS Settings
Maconomy Enterprise Currency		

REST API Section

These are the settings for the Maconomy RESTful web service.



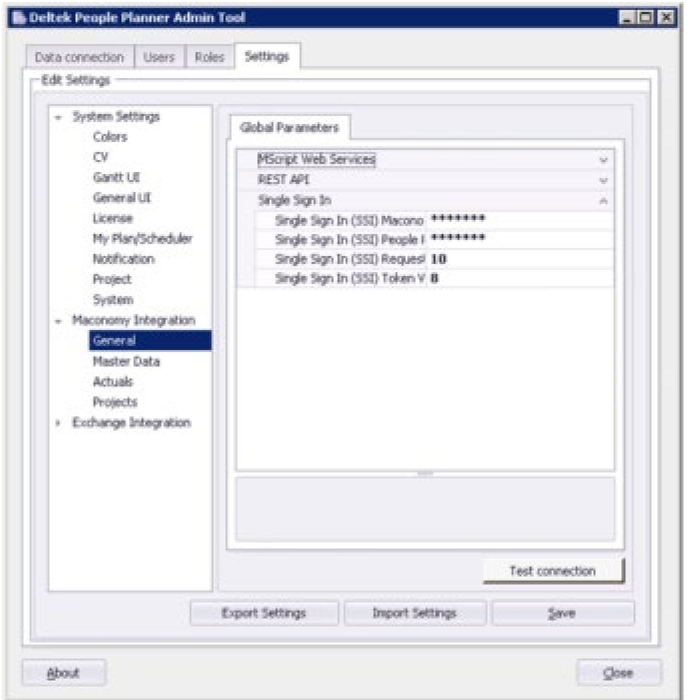
Note: If the URL in this section is left blank, People Planner reverts to using the MaconomyWS Web Service for project import. In addition, items that require Maconomy RESTful, such as importing calendars or absences, are not supported.

Setting	Notes	For More Information
Maconomy REST URL (default)	The URL for the Maconomy RESTful web service.	Maconomy RESTful Web Service
Maconomy REST URL used by the People Planner API		Maconomy RESTful Web Service – Alternative URLs
Maconomy REST URL used by the People Planner Service		Maconomy RESTful Web Service – Alternative URLs
Maconomy REST Username	Usually the same username that is used for the MaconomyWS web service.	Maconomy RESTful Web Service
Maconomy REST Password	Usually the same password that is used for the MaconomyWS web service.	Maconomy RESTful Web Service
Only import projects marked for transfer in Maconomy		Import Projects on the People Planner Side
Use REST for project import	If the REST settings have been provided, the project	

Setting	Notes	For More Information
	import by default switches from using the MaconomyWS web service to the Maconomy REST web service. If you still want to use MaconomyWS, you can deselect this checkbox. The RESTful web service is still used for absence import. A possible reason for wanting to use MaconomyWS for the project import is that you need the support of I-files. This setting was introduced in People Planner 3.6.1.	
Use REST for Master Data import if possible	Historically, Master Data has been imported using the MaconomyWS web service. However, you can also import some types of Master Data using the Maconomy RESTful web service. This setting controls which web service you want to use.	

Silent Sign In Section

These are the settings for the People Planner side of the Silent Sign In functionality.



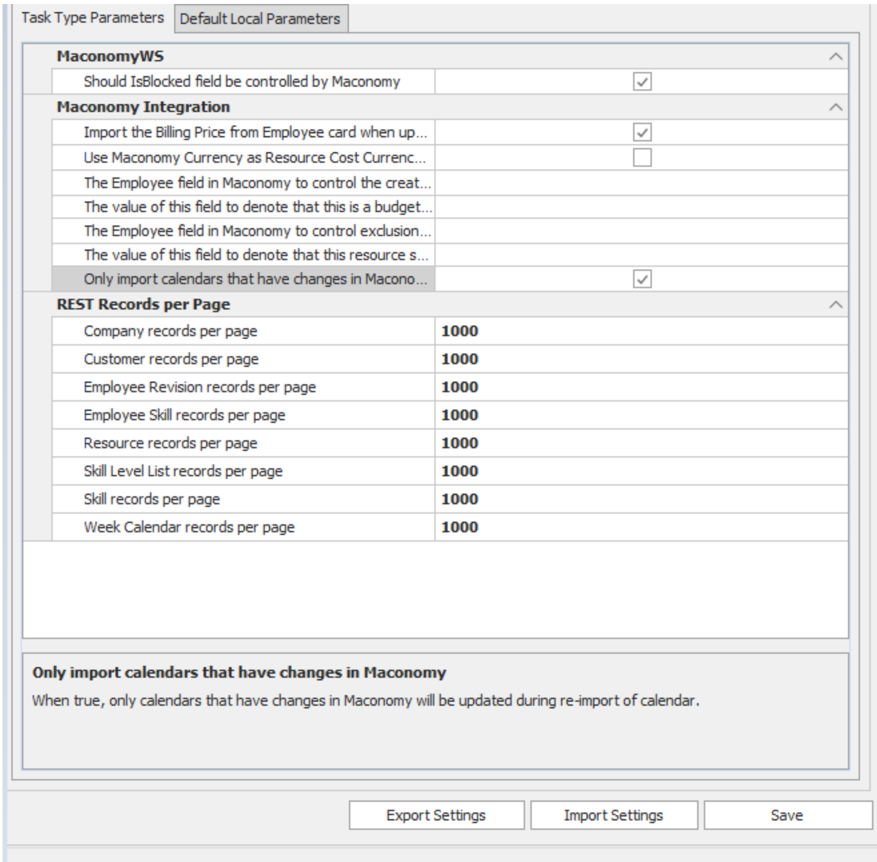
Setting	Notes	For More Information
Silent Sign In (SSI) Maconomy Secret Key	This value must be the same that is configured on the Maconomy end of the integration.	People Planner Silent Sign In
Silent Sign In (SSI) People Planner Secret Key	This value should be different from the Maconomy key.	People Planner Silent Sign In
Silent Sign In (SSI) Request Window in Seconds		People Planner Silent Sign In
Silent Sign In (SSI) Token Validity in Hours		People Planner Silent Sign In

Master Data Tab

This tab has two subtabs:

- **Task Type Parameters** — This tab describes how to import the master data.
- **Default Local Parameters** — This tab describes which master data should be imported.

Task Type Parameters Tab



Setting	For More Information
Maconomy WS	
Should IsBlocked field be controlled by Maconomy	Task Type Parameters Tab
Maconomy Integration	
Import the Billing Price from Employ card when updating Master data	
Use Maconomy Currency as Resource Cost Currency in People Planner	
The Employee field in Maconomy to control the creation of budget resources in People Planner.	
The value of this field to denote that this is a budget resource.	

Setting	For More Information
The Employee field in Maconomy to control exclusion of this resource from calendar integration.	
The value of this field to denote that this resource should be excluded (from calendar integration)	
Only import calendars that have changes in Maconomy	
REST records per Page	
Company records per page	
Customer records per page	
Employee Revision records per page	
Employee Skill records per page	
Resource records per page	
Skill Level List records per page	
Skill records per page	
Week Calendar records per page	

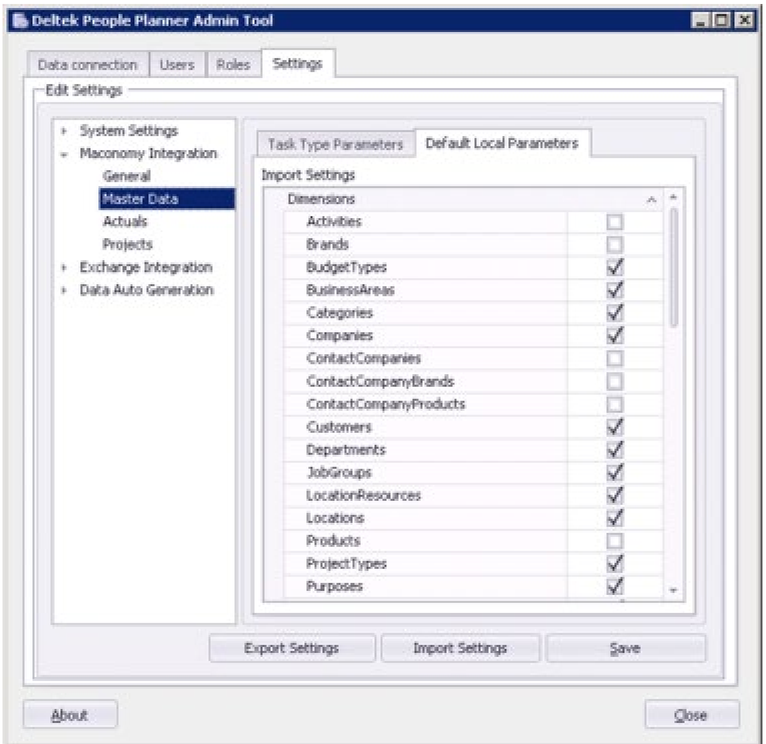
Default Local Parameters Tab

This tab lists which master data should be imported by default. Each of the actual Task Specifications can define a different set of master data to import.

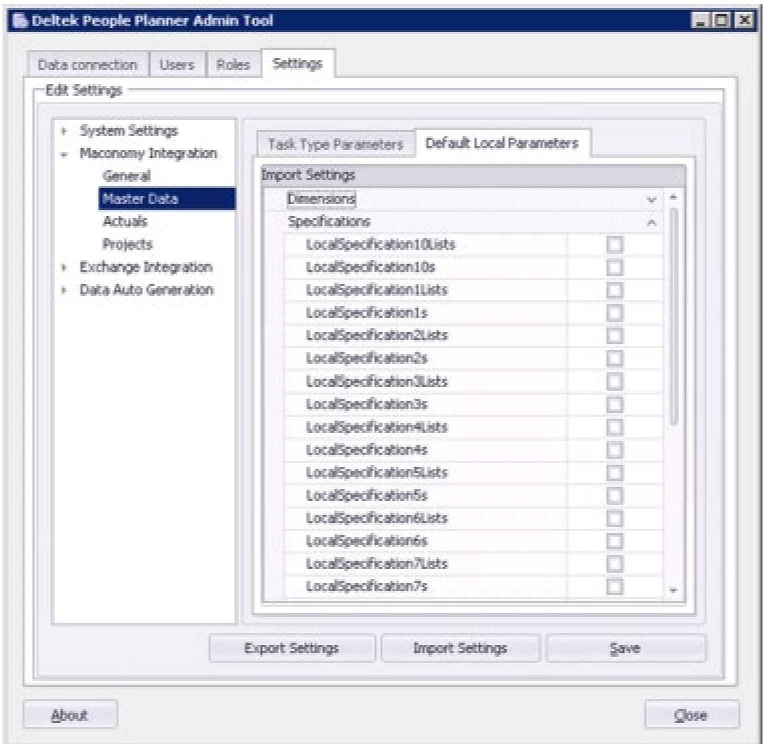
The tab is divided into these subsections:

- Dimensions
- Specifications
- REST filters

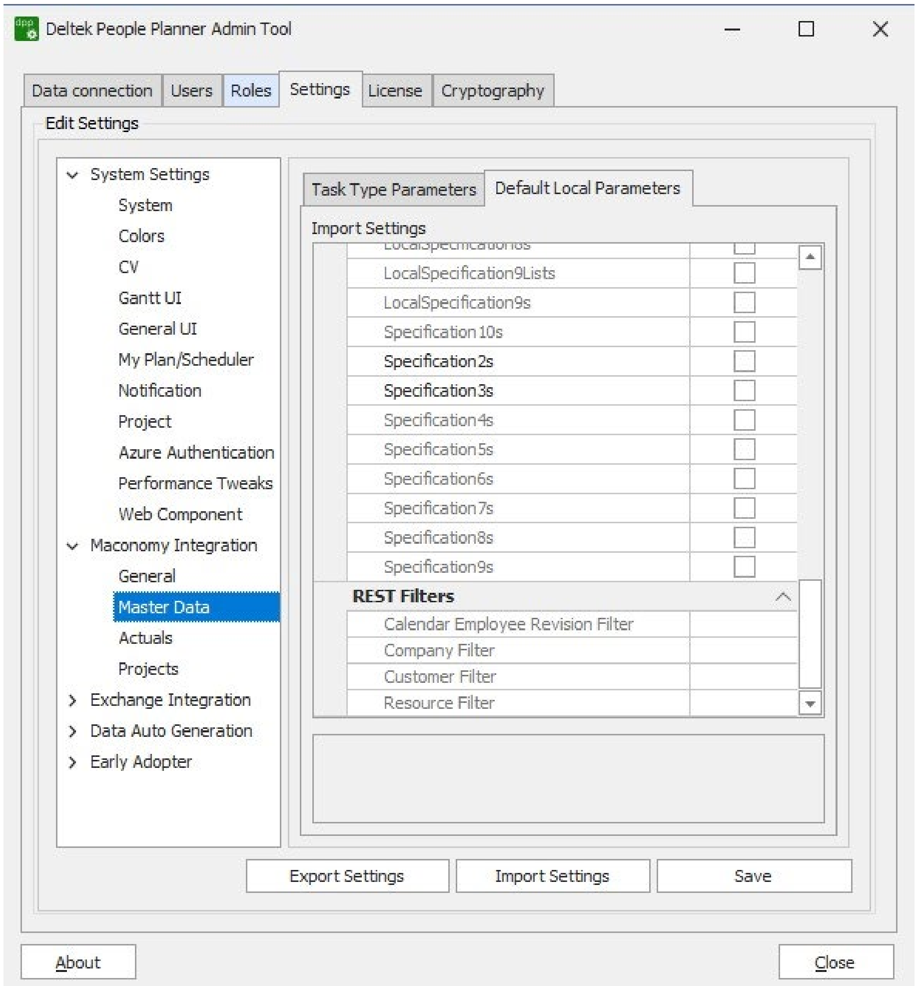
The division is merely to better organize the master data. There are no other differences between the sections; they are all master data.



The Specification section lists all of the possible LocalSpecifications, 1-10, and the possible Specifications, 2-10.



Note: If you have not configured for using REST, LocalSpecification4-10 and Specification4-10 are disabled. If you have configured for using REST, but the version is not at least that of Maconomy 2.4, they are also disabled.

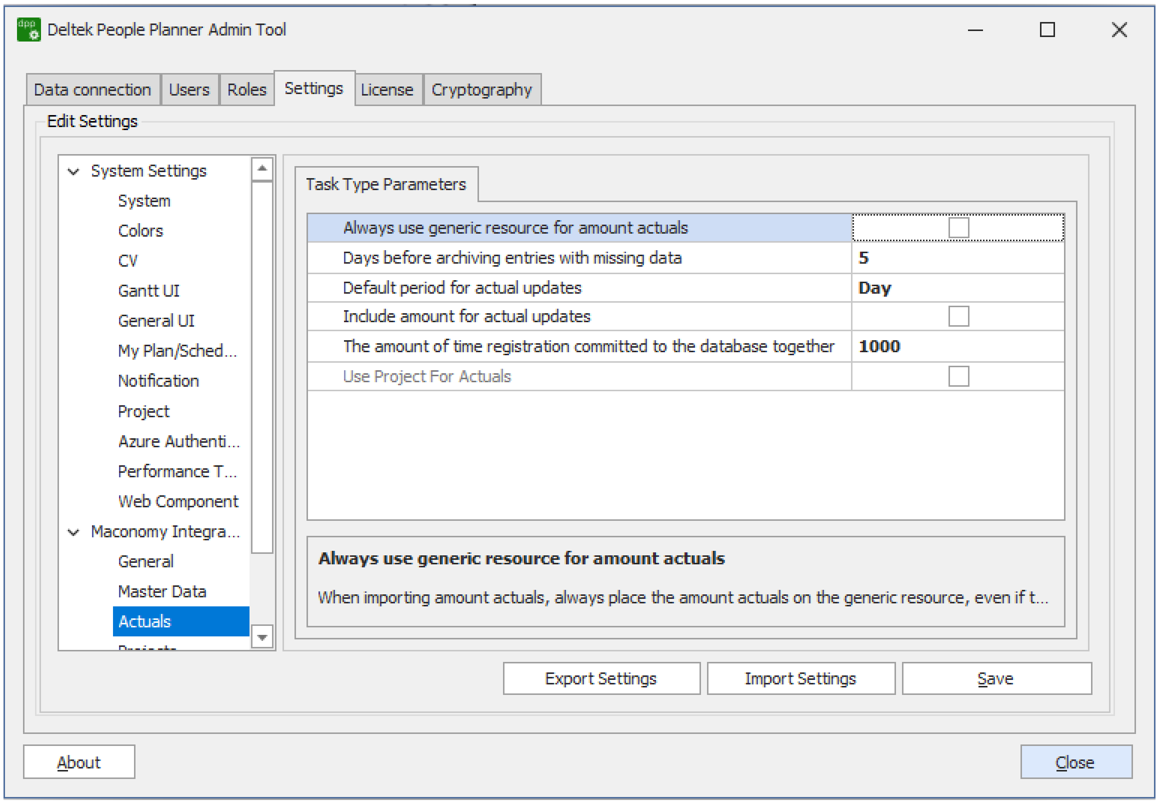


The REST filters section lists all the records you can import to People Planner. You can create a custom filter for the data imported from Maconomy by specifying how many records per filter should be received from Maconomy during an import. By default, the number of records that can be imported per page is 1000.

See Import Master Data from Maconomy for a description of the types of master data.

Actuals Tab

Actuals is another name for time registrations, that is, “actual values,” as opposed to “planned values.”



For more information about the parameters in this tab, refer to Type Parameters.

Projects Tab

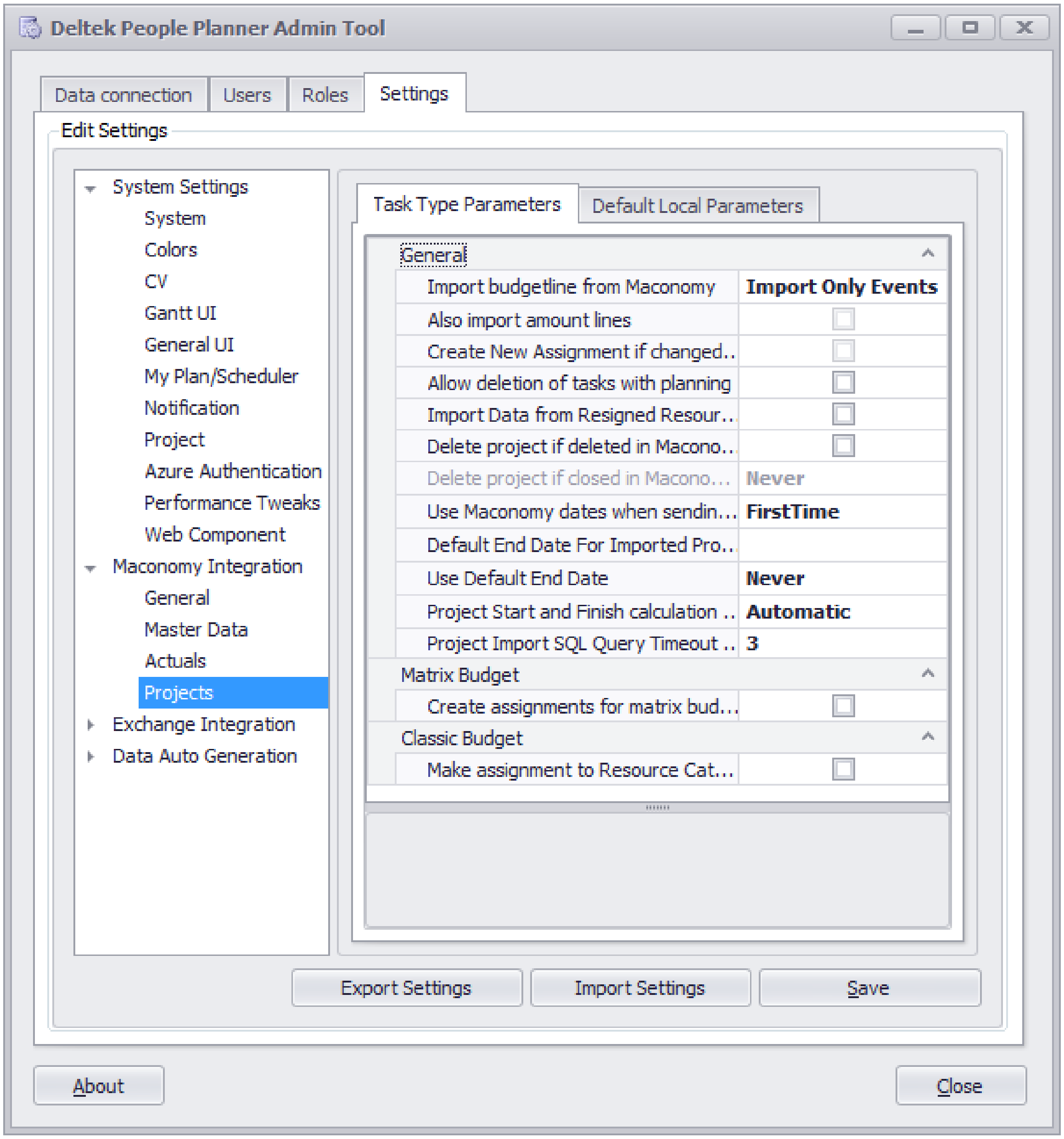
This section contains the settings for how to import projects from Maconomy into People Planner.

It has two sub-tabs:

- **Task Type Parameters** — General settings for how to import the projects.
- **Default Local Parameters** — These parameters are used for suggesting default values when importing projects manually.

Task Type Parameters Tab

This tab is divided into two sections, General and Classic Budget.



The General section applies to the import of both Classic and Matrix budgets.

General Settings Section

Setting	Notes	For More Information
Import budget line from Maconomy	This setting has three options: ▪ Import Only Events ▪ Import Events and Assignments	Import Events and Assignments
Also Import Amount Lines	You should only select this checkbox if you use Rest for project imports—that is, the checkbox for the setting Maconomy Integration » General » REST API » Use Rest for project import is selected. The default value is that the setting Also Import Amount Lines is not selected.	
Import Required Skills		
Create New Assignment if Employee is changed in Maconomy Budgetline		Import Events and Assignments
Allow deletion of tasks with planning		Import Events and Assignments
Import Data from Resigned Resources		Import Events and Assignments
Delete project if deleted in Maconomy		Import Events and Assignments
Use Maconomy dates when sending projects from the Maconomy Portal	The name of this setting is a bit misleading. This setting is used by the Maconomy API web service when it is requested to import a project from Maconomy; that is, when a user clicks the **Send to People Planner** buttons in any of the Maconomy clients.	Start and Finish Times
Default End Date for Imported Projects		Start and Finish Times
Use Default End Date		Start and Finish Times

Setting	Notes	For More Information
Project Start and Finish calculation on imported projects		Start and Finish Times

Matrix Budget Settings Section

Create assignments for matrix budget with zero hours	If this setting is selected, People Planner creates assignments for all resources, even for those where no hours have been allocated on the budget line. This setting was introduced in People Planner 3.6.1.	

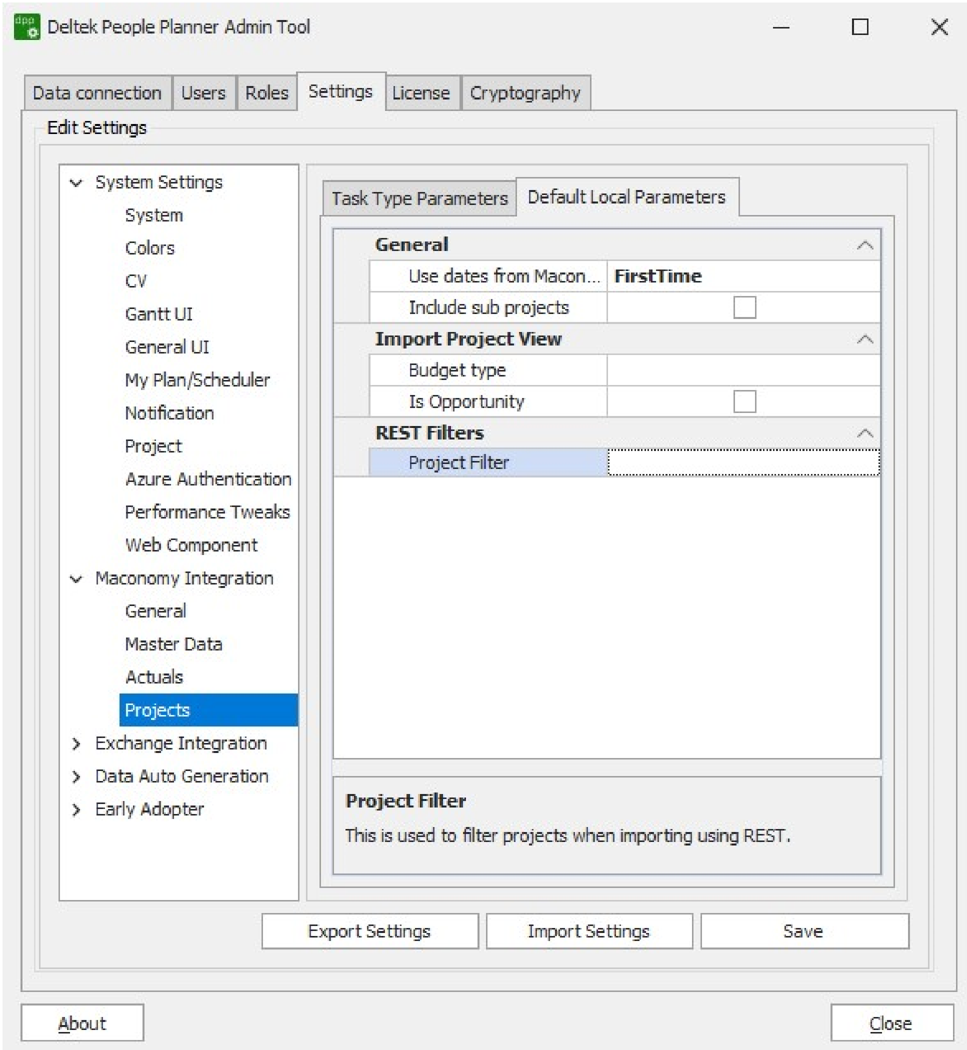
Classic Budget Settings Section

The Classic Budget section is specifically for importing projects with classic budgets. This setting is mainly provided for backward compatibility, to ensure that such budgets can be imported as previously, that is, ignoring employee categories.

Setting	Notes	For More Information
Make assignment to Resource Category	As of People Planner 3.6 you can import employee categories, which become resource categories in People Planner. It has always been possible to assign an employee category to a budget line in Maconomy, but before People Planner 3.6, this was simply ignored. This setting determines whether this behavior should continue.	Import Classic Budget – Employee Categories

Default Local Parameters

This sub-tab determines the default values that are used in the Import Projects dialog and when creating a task for importing projects. You can change them if appropriate.



Setting	Notes	For More Information
General		
Use dates from Maconomy	In People Planner 3.6 this field has changed from a checkbox to a dropdown with three options: ▪ Always ▪ FirstTime ▪ Never	
Include sub projects		
Import Project View		

Setting	Notes	For More Information
Budget type		
Is Opportunity		
REST Filters		
Project filter	Create a custom project filter for the data imported from Maconomy by specifying how many records per filter should be received from Maconomy during an import. By default, the number of records that can be imported per page is 1000.	

Setup

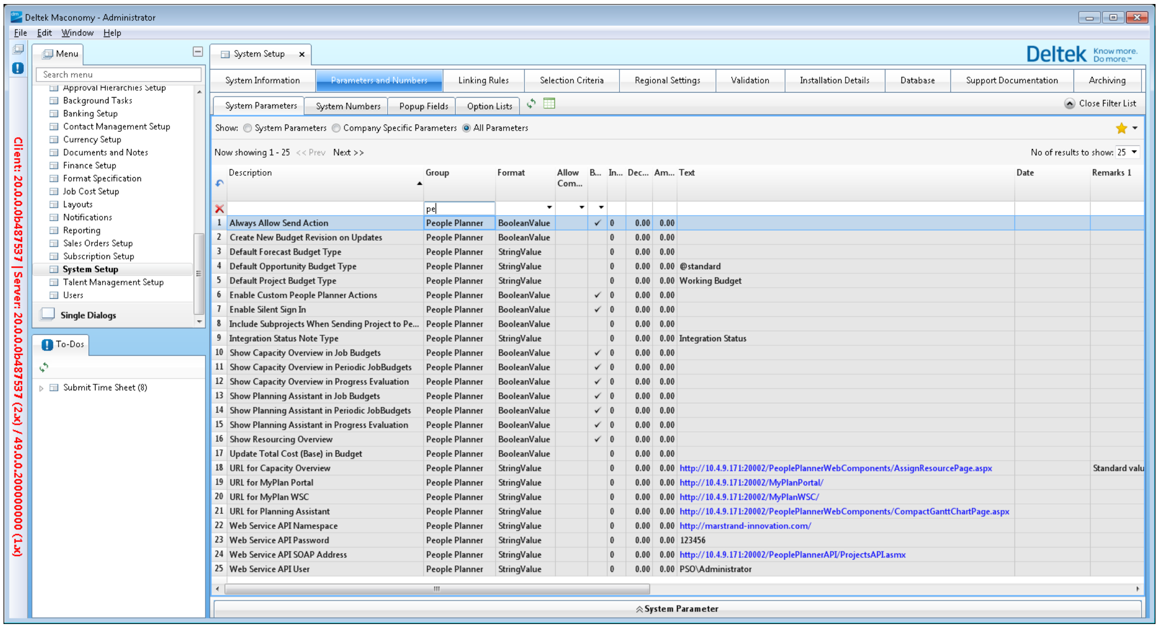
Tip: See the *Deltek People Planner Technical Installation Guide* for a description of how to install and configure the software.

Maconomy System Setup

Most of the Maconomy settings that relate to the integration with People Planner are accessible from the Maconomy Workspace Client when you are logged in as administrator.

To access Maconomy settings that are related to the People Planner integration:

1. Log in to the Maconomy Workspace Client as administrator.
2. Navigate to **Setup » System Setup**.
3. Click on the **Parameters and Numbers** tab.
4. Click on the **System Parameters** sub-tab.
5. In the Group column, filter on **People Planner**.
6. Double-click on a setting to bring up the settings editor.



Note: In older versions of Maconomy, you configured the People Planner parts of Maconomy by editing in various I-files. You can still do this, and such edits will override any edits made to the settings in the Workspace Client. This is something that you need to be aware of when you are updating an older installation. However, for the newer versions of Maconomy, it is recommended that you use the WSC.

The following table describes the available system parameters.

Setting	Notes	For More Information
Always Allow Send Action	If this setting is not selected, the Send to People Planner buttons are disabled when a job has been sent to People Planner; that is, it is not possible to resend a job. In the new versions of Maconomy, this setting is enabled by default. This is a change from previously.	
Create New Budget Revision on Updates		
Default Forecast Budget Type		
Default Opportunity Budget Type		
Default Project Budget Type		Budget Types

Setting	Notes	For More Information
Enable Custom People Planner Actions	This checkbox must be selected for the Send to People Planner buttons to become visible.	
Enable Silent Sign In	This setting must be selected if you want to use People Planner Silent Sign In. **Note:** This setting must also be enabled using MConfig.	People Planner Silent Sign In
Include Subprojects When Sending Project to People Planner		Import Projects using the Import Project View
Integration Status Note Type		
Show Capacity Overview in Job Budgets	This setting determines whether the People Planner Capacity Overview should be shown under Jobs » Budgeting » Budget. This setting was introduced in Maconomy 2.4 but removed again in Maconomy 2.4.4.	People Planner Web Components
Show Capacity Overview in Periodic Job Budget	This setting determines whether the People Planner Capacity Overview should be shown under Jobs » Budgeting » Periodic Budget. This setting was introduced in Maconomy 2.4 but removed again in Maconomy 2.4.4.	People Planner Web Components
Show Capacity Overview in Progress Evaluation	This setting determines whether the People Planner Capacity Overview should be shown under Jobs » Progress Evaluation » Progress Evaluation. This setting was introduced in Maconomy 2.4 but removed again in Maconomy 2.4.4.	People Planner Web Components
Show Planning Assistant in Job Budgets	This setting determines whether the People Planner Planning Assistant should be shown under Jobs » Budgeting » Budget. This setting was introduced in Maconomy 2.4.	People Planner Web Components
Show Planning Assistant in Period Job Budgets	This setting determines whether the People Planner Planning Assistant should be shown under Jobs » Budgeting » Periodic Budget. This setting was introduced in Maconomy 2.4.	People Planner Web Components

Setting	Notes	For More Information
Show Planning Assistant in Progress Evaluation	This setting determines whether the People Planner Planning Assistant should be shown under Jobs » Progress Evaluation » Progress Evaluation. This setting was introduced in Maconomy 2.4.	People Planner Web Components
Show Resourcing Overview	This setting determines whether the People Planner Resourcing Overview Assistant should be shown under Jobs » Resourcing » Resourcing Overview. If you do not select this setting, the Resourcing tab is not shown. This setting was introduced in Maconomy 2.4.	People Planner Web Components
Update Total Cost (Base) in Budget		
URL for Capacity Overview	The URL of the People Planner Capacity Overview page. The general form is: `http://<server>:<port>/PeoplePlannerWebComponents/AssignResourcePage.aspx` This setting was introduced in Maconomy 2.4 but removed again in Maconomy 2.4.4.	People Planner Web Components
URL for MyPlan Portal	The URL of the MyPlan web page. This is specifically intended for embedding MyPlan in the Maconomy Portal. The general form is: `http://<server>:<port>/MyPlanPortal/` This setting is available only when using Maconomy 2.5.4 and older versions. **Note:** MyPlan in the Maconomy Portal is deprecated in People Planner 4.3. This will be removed altogether in People Planner 4.4. Currently, the Maconomy Portal is available only when using Maconomy 2.5.x and older versions.	People Planner MyPlan
URL for MyPlan WSC	The URL of the MyPlan web page. This is specifically intended for embedding MyPlan in the WSC. The general form is: `http://<server>:<port>/MyPlanWSC/` This URL changed as of People Planner 3.6.1. Previously, it was simply MyPlan. **Note:** If you update a Maconomy system, you must change this value.	People Planner MyPlan

Setting	Notes	For More Information
URL for Planning Assistant	The URL of the People Planner Web Component. The general form is: `http://<server>:<port> /PeoplePlannerWebComponents /CompactGanttChartPage.aspx` This setting was introduced in Maconomy 2.2.2.	People Planner Web Components

Web Service API Namespace	From People Planner version 3.9 and newer you should set this to:
	`http://peopleplanner.deltek.com/api/`
	`This is also the default for Maconomy version 2.5 and newer.`
		People Planner API Web Service

Web Service API Password		People Planner API Web Service
Web Service API SOAP Address	The URL for the People Planner API web service. The general form is: `http://<server>:<port> /PeoplePlannerAPI /ProjectsAPI.asmx`	People Planner API Web Service
Web Service API User		People Planner API Web Service

Maconomy Web Services

When People Planner exchanges data with Maconomy, it uses one or both of the Maconomy web services:

- MaconomyWS Web Service.
- Maconomy RESTful Web Service.

People Planner 3.5 added support for using the Maconomy RESTful web service. However, this was merely a port of the existing project import functionality to the new platform. People Planner 3.6 expanded on this with support for importing Maconomy matrix budgets and importing absences.

Maconomy RESTful vs. MaconomyWS Web Service

Historically the integration between People Planner and Maconomy has been based on the MaconomyWS Web Service. New integrations—for example, importing matrix budgets or importing absences in People Planner 3.6—will be based on the new Maconomy RESTful Web Service. Existing integrations will still be based on MaconomyWS until such time that it is decided to expend the effort to port them to using Maconomy RESTful.

The following table describes the support matrix as of People Planner 3.6.

Import	MaconomyWS Web Service	Maconomy RESTful Web Service
Importing master data, for example, customers, resources, and users	Required	Partially supported
Importing master data: LocalSpecifications1-3 and Specifications2-3	Required	Not supported
Importing master data: LocalSpecifications4-10 and Specifications4-10	Not supported	Required
Importing projects with classic budgets	Supported (fallback)	Supported (preferred)
Importing projects with matrix budgets	Not supported	Required
Importing actuals	Supported (fallback)	Supported (Time Registration account and Registered Cost (Amount) account only)
Importing absences	Not supported	Required
Importing calendars	Not supported	Required

When the People Planner administrator configures the integration with Maconomy, the settings for where People Planner should find the Maconomy web services are critical.

Setting	Must Be Set?
Settings for the MaconomyWS web service	Mandatory. The integration does not work without it.
Settings for the Maconomy RESTful web service	Optional. However, you will not be able to leverage the new features without it.

- If the MaconomyWS web service URL *is not provided*, the integration with Maconomy does not work at all.
- If the Maconomy RESTful web service URL *is not provided*, the integration with Maconomy still works; however, the new integrations do not work.
- If the Maconomy RESTful web service URL *has been provided*, the new integrations work. Additionally, some of the existing integrations move from using the MaconomyWS web service to using the Maconomy RESTful web service.

I-Files

A well-established way to customize the MaconomyWS web service is to edit its I-files. See Import Projects using the Import Project View for an example of this.

The Maconomy RESTful web service does not have I-files. As a result, choosing between using the MaconomyWS or the Maconomy RESTful web service is also a choice of whether to be able to use I-files for customization.

Tip: You can create customizations to Maconomy using the Extension Framework and expose these extensions via the Maconomy RESTful Web Service. However, People Planner cannot be configured for calling these, and therefore this is not a solution.

You can configure project import (starting from People Planner 3.6) and actuals import (starting from People Planner 3.9) to use the Maconomy RESTful web service. The project import and actuals import can use either the Maconomy RESTful Web Service or the MaconomyWS. The project import and actuals import are the only import functionalities that can use either of these services. Every other type of import must use the MaconomyWS, even if a URL for the Maconomy RESTful Web Service has been provided. Therefore, it is only the edits to the JobBudgets.I file that are in question.

Note: The absence import also uses the Maconomy RESTful Web Service, but since this import has never been possible with the MaconomyWS Web Service, there are no I-files to consider in this case.

Warning: If you are updating an existing People Planner installation, and you want to start using the Maconomy RESTful Web Service, you should consider the I files. If the current project import or actuals import depends on customization in the JobBudgets.I file, its behavior might change with the move to REST.

The I-files have always been outside of the scope of the People Planner product, but since People Planner bases all new integrations with Maconomy on the Maconomy RESTful web service, it possible that some of the I-file customizations will be represented as settings in the People Planner Admin Tool. See Import Projects using the Import Project View for an example of this.

MaconomyWS Web Service

Tip: See the *Deltek People Planner Technical Installation Guide* for a description of how to install and configure the MaconomyWS Web Service.

Before People Planner version 3.5, all imports of data from Maconomy went through the MaconomyWS web service.

In People Planner 3.5, the RESTful web service was supported for the first time, and it was made possible to import Maconomy Classical Budgets using either MaconomyWS or Maconomy RESTful. All other types of data import required MaconomyWS.

Although the support of RESTful was expanded as of People Planner 3.6, it is still a requirement to use the MaconomyWS web service for all imports other than projects and absences.

People Planner can use the MaconomyWS web service to:

- Import master data.
- Import projects and their budgets—classic budget only.
- Export favorites.
- Import actuals—that is, time registrations.

People Planner cannot use the MaconomyWS web service to:

- Import projects with matrix budgets.
- Import absences.
- Import (Local)Spec4-10.
- Import of calendars.

Instead, it must use the Maconomy RESTful web service for this. See Maconomy RESTful Web Service for a discussion of the Maconomy RESTful web service.

MaconomyWS Web Service – Alternate URLs

The MaconomyWS web service can be called from different People Planner components:

- **The People Planner Windows Application** — When doing a manual import.
- **The People Planner Service** — When running a scheduled task.
- **The People Planner API Web Service** — When a user pushes a project from Maconomy to People Planner.

Because the People Planner components can be installed on different machines—for example, for better performance—it is possible that they might need to call the MaconomyWS web service using different URLs.

If values are provided for the two alternative URL fields:

- Maconomy Web Service URL used by the People Planner API
- Maconomy Web Service URL used by the scheduling service

The People Planner API and the People Planner Service use the alternative URLs. If the fields are left empty, they instead fall back and use the default **Maconomy Web Service URL** setting.

Other MaconomyWS-Related Settings

The central settings that relate to the MaconomyWS Web service are described in the *Deltek People Planner Technical Installation Guide*. This section describes only those additional settings that are not already covered there.

These settings apply to the MaconomyWS web service alone; changing them has no consequences for the Maconomy RESTful web service.

- Request Encoding
- Timeout Webservice (seconds)
- Webservice response maximum size (bytes)

Encoding

In earlier Maconomy versions, the MaconomyWS web service expected requests to be encoded using iso-8859-1. When Maconomy started supporting Unicode—that is, to support alternate alphabets like Cyrillic, Greek, Hebrew, Arabic, Chinese, Japanese, and so on—the MaconomyWS web service was changed to require the utf-8 encoding.

The default in a new People Planner database is to use utf-8. If using Test connection fails, try changing the encoding to iso-8859-1 and test the connection again.

Timeout Webservice

This setting is set to 600 seconds, equaling 10 minutes. If the MaconomyWS web service does not reply within this time limit—for example, because the response is too big or because the network has a long latency—the request times out.

You can set this value to a smaller or larger value if required.

Webservice Response Maximum Size

This is the maximum size of the data that MaconomyWS is allowed to return. If the reply is larger than this size, you can change this setting. As a result, more memory is set aside for the reply.

Timeout of the MaconomyWS Web Service

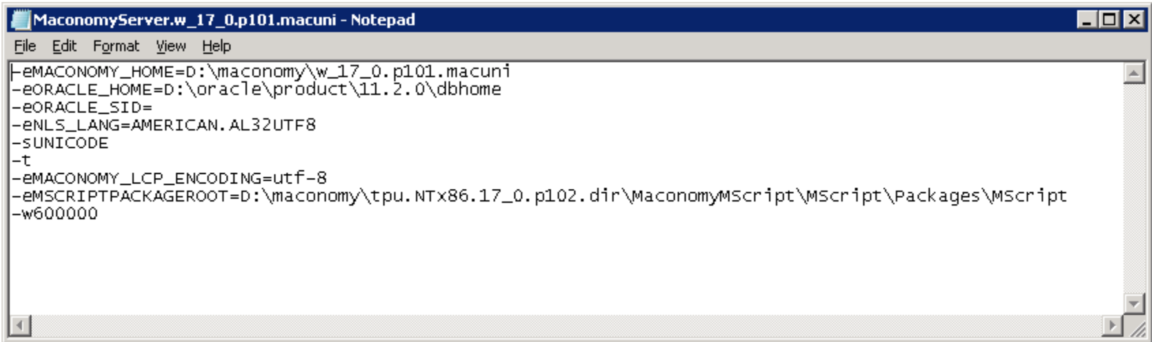
The **Timeout Webservice** setting controls how long People Planner waits before it considers the connection to MaconomyWS to have timed out.

However, Maconomy also has its own timeout. By default the MaconomyWS web service times out if it has not been able to complete its reply to a request within two minutes. This can happen if the request results in a large amount of data, that is, too much for Maconomy to handle within this time limit.

The timeout can be controlled through the w-parameter in the MaconomyServer.XXXX.I file. “W” means “wait.” You can find this file in the $MaconomyHome/IniFiles/ folder; it is named something like the following:

```
MaconomyServer.w_17_0.p101.macuni.I
```

You can edit this file with any text editor, such as Notepad. Add a line to the end with the new **w** setting, as shown in the following example.




```
-eMACONOMY_HOME=D:\maconomy\w_17_0.p101.macuni
-eORACLE_HOME=D:\oracle\product\11.2.0\dbhome
-eORACLE_SID=
-eNLS_LANG=AMERICAN.AL32UTF8
-SUNICODE
-t
-eMACONOMY_LCP_ENCODING=utf-8
-eMSCRIPTPACKAGEROOT=D:\maconomy\tpu.NTx86.17_0.p102.dir\MaconomyMScript\MScript\Packages\MScript
-w600000
```

The value is in milliseconds. In the preceding example, the **w** is set to 600.000 ms = 10 minutes,

After adding this, you must restart the Maconomy services for it to load the new value.

Maconomy RESTful Web Service

Tip: See the *Deltek People Planner Technical Installation Guide* for a description of how to install and configure the Maconomy RESTful Web Service.

Starting with Maconomy 2.2, an alternative is available to MaconomyWS: the Maconomy RESTful web service.

Warning: People Planner requires a Maconomy version equal to or later than Maconomy 2.2.2 to use the Maconomy RESTful Web Service.

People Planner can use the Maconomy RESTful web service to:

- Import projects and their budgets, both classic budgets and matrix budgets.
- Import absences.
- Import (Local)Spec4-10.

People Planner *cannot* use Maconomy RESTful web service to:

- Import master data.
- Export favorites.
- Import actuals, that is, time registrations.

Instead, it must use the MaconomyWS web service for this. See MaconomyWS Web Service for a description of the MaconomyWS web service.

Maconomy RESTful Web Service – Alternative URLs

You can call the Maconomy RESTful web service from several People Planner components:

- **The People Planner Windows Application** — When doing a manual import.
- **The People Planner Service** — When running a scheduled task.
- **The People Planner API Web Service** — When a user pushes a project from Maconomy to People Planner.

Because you can install the People Planner components on different computers—for example, for better performance—they might need to call the Maconomy RESTful web service using different URLs.

If values are provided for the two alternative URL fields:

- Maconomy Web Service URL used by the People Planner API
- Maconomy Web Service URL used by the scheduling service

The People Planner API and the People Planner Service use the alternative URLs. If you leave these fields empty, they use the default **Maconomy REST URL** setting.

People Planner Web Suite

In addition to the People Planner Windows application, the People Planner program suite includes several web programs. For the integration between People Planner and Maconomy, the following are the relevant ones:

- People Planner API web service
- People Planner MyPlan web page
- People Planner Web Components web page

The People Planner Silent Sign In functionality is used with the embedded People Planner web pages, and is also described in this section.

People Planner API Web Service

> **Tip:** See the *Deltek People Planner Technical Installation Guide* for a description of how to install and configure the people planner API Web Service.

When Maconomy needs to call People Planner, it calls the People Planner API web service. Maconomy uses the People Planner API web service to:

- Push a project to People Planner.
- Import ETCs from People Planner.
- Import the Periodic Budget.
- Request SSI tokens.

People Planner Silent Sign In

> **Tip:** See the *Deltek People Planner Technical Installation Guide* for a description of how to install and configure the People Planner SSI functionality.

It has long been possible to embed the MyPlan web application in the Maconomy clients. However, when users navigated to where MyPlan was embedded, they were prompted for an extra login. This happened regardless of users already being logged in to the Maconomy client.

The Silent Sign In functionality removes the need for this extra login prompt. Instead, the Maconomy Workspace client uses the existing login to Maconomy to do a login to People Planner as well. This login is “silent” in the sense that users simply see MyPlan open.

SSI is used by:

- MyPlan

- The People Planner Web Component

The People Planner SSI must be configured on both the People Planner and the Maconomy sides. On the Maconomy side, it must be enabled in both MConfig and the WSC.

> **Note:** Sometimes you see the term **Single Sign In** used. This is not the correct name. Although the figures in this document show the wrong term being used, the text refers to them by the correct name.

> **Warning:** People Planner Silent Sign In requires People Planner 3.6 or later and Maconomy 2.2.2 or 2.3 and later.

Choosing whether to Use SSI

Silent Sign In became supported with People Planner 3.6. Setting up a system for using SSI solved the problem of the unwanted login prompt in the Maconomy Workspace Client (WSC). However, it came with its own price.

Running MyPlan directly from the browser requires Windows Authentication, and running it embedded in WSC requires Anonymous Authentication to enable the use of SSI. Because you cannot configure MyPlan to use both authentication modes, it became a question of choosing between either the standalone MyPlan or the embedded MyPlan.

> **Note:** Beginning with People Planner 3.6.1, MyPlan also supports Azure Authentication as an alternative to Windows Authentication. For more information about this, see the *Deltek People Planner Administration Guide.*
>
> Azure Authentication is deprecated in 4.3. In a future version, this will be removed altogether.

The installation is split into the following web sites:

- MyPlan — Use this web site directly from a browser.
- MyPlanWSC — Use this web site embedded in the Maconomy Workspace Client.
- MyPlanPortal — Use this web site embedded in the Maconomy Portal.

  > **Note:** MyPlan in the Maconomy Portal is deprecated in People Planner 4.3. This will be removed altogether in People Planner 4.4.
  >
  > Currently, the Maconomy Portal is available only when using Maconomy 2.5.x and older versions.

Each web site supports having its own authentication scheme. This solves the problem of having to choose between how users must work with MyPlan.

As a result, there is no longer any argument against choosing to use MyPlan with SSI:

- MyPlan — Configure this web site for Windows Authentication.
- MyPlanWSC — Configure this web site for Anonymous Authentication and SSI.

How People Planner SSI Works

When a user logs in to the Maconomy Workspace Client and navigates to one of the pages where People Planner is embedded, the WSC asks People Planner for an SSI token. It then uses this token to do a login to People Planner.

1. The user logs in to the WSC.
2. The user navigates to a page where either MyPlan or the People Planner Web Component is embedded.
3. The Maconomy Coupling Service asks the People Planner API web service for an SSI token.
   a. It sends a request with information about the user to the People Planner API.
   b. The request is encrypted with the Maconomy Secret Key to prevent snooping by any third parties.
4. The People Planner API constructs an SSI token and returns it to the Maconomy Coupling Service.
   a. People Planner first decrypts the request for an SSI token.
   b. It then validates the user against its own list of valid users.
   c. If the user is allowed to log in to People Planner, an SSI token is created.
   d. The reply is encrypted with the People Planner Secret Key to prevent snooping by third parties.
   e. The encrypted reply is finally returned to Maconomy.
   f. The SSI token is valid for a specific number of hours—configurable in People Planner—after which it must then be renewed by Maconomy.
5. The WSC appends the SSI token to all calls to MyPlan or the People Planner Web Component.
   a. Maconomy does not know the People Planner Secret Key, and cannot decrypt the SSI token. It simply appends the token as-is to the calls.
6. When the user navigates to where MyPlan or the People Planner Web Component is embedded, MyPlan or the People Planner Web Component validates the SSI token and logs the user in.
   a. The SSI token is decrypted using the People Planner Secret Key.
   b. It then validates the user against its own list of valid users.
   c. If the user is a valid People Planner user, the user is then logged in to MyPlan or the People Planner Web Component.
   d. If the token is too old, it is rejected, and the user is not logged in. It is Maconomy's responsibility to know when the SSI token must be renewed.

MyPlan

In People Planner 3.6, to use People Planner SSI, you needed to change the authentication of MyPlan from Windows Authentication to Anonymous Authentication. From People Planner 3.6.1 this is no longer necessary.

> **Note:** If you made this change in People Planner 3.6, you must revert to Windows Authentication in People Planner 3.6.1 or newer.

The installation is split into the following web sites:

- MyPlan — Use this web site directly from a browser; this is the standalone web site.
- MyPlanWSC — Use this web site embedded in the Maconomy Workspace Client.

- MyPlanPortal — Use this web site embedded in the Maconomy Portal.

> **Note:** MyPlan in the Maconomy Portal is deprecated in People Planner 4.3. This will be removed altogether in People Planner 4.4.
>
> Currently, the Maconomy Portal is available only when using Maconomy 2.5.x and older versions.

You can configure each of these to use its own authentication scheme. You should use MyPlanWSC for embedding in the Maconomy Workspace Client; you should configure it for Anonymous Authentication, but this is its default setup in any case.

Running MyPlan directly from a browser still uses the MyPlan website; you should configure it for Windows Authentication.

People Planner Web Component

The People Planner Web Component also requires Anonymous Authentication, but this is its default setup in any case.

User Credentials

For SSI to work, Maconomy must present People Planner with a set of credentials that People Planner recognizes. This is usually not an issue because People Planner imports the credentials as part of importing users from Maconomy in the first place. See Import Master Data from Maconomy.

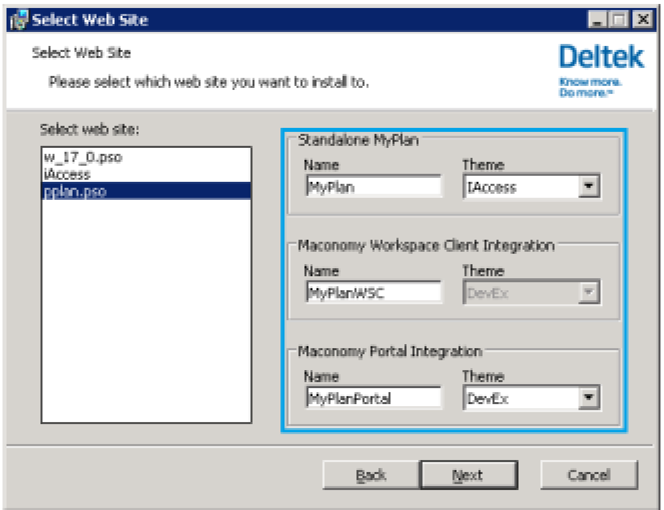
People Planner MyPlan

> **Tip:** See the *Deltek People Planner Technical Installation Guide* for a description of how to embed MyPlan in the Maconomy WSC.

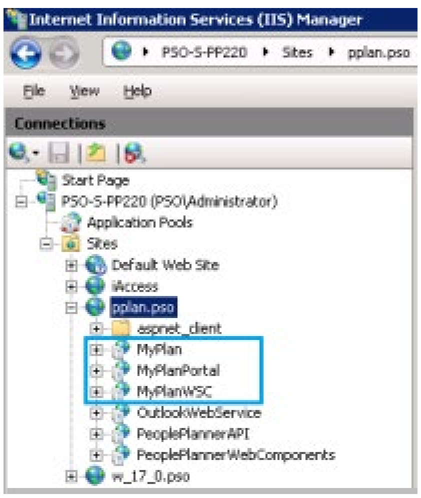
You can run MyPlan directly in a browser. Alternatively, you can embed it in the Maconomy clients.

Before People Planner 3.6.1, this could pose you with a dilemma because you had to choose between the two models. Running MyPlan directly from the browser required that you set it up for Windows Authentication. Running it embedded in the WSC required that you set it up for Anonymous Authentication. Unfortunately, you could not configure MyPlan for both types of authentication at the same time.

As of People Planner 3.6.1, the installation of MyPlan is divided into three parts.



You install the MyPlan software only once, but it is accessed for the three web sites, each with its own configuration.



Each of the web sites is dedicated to a specific usage.

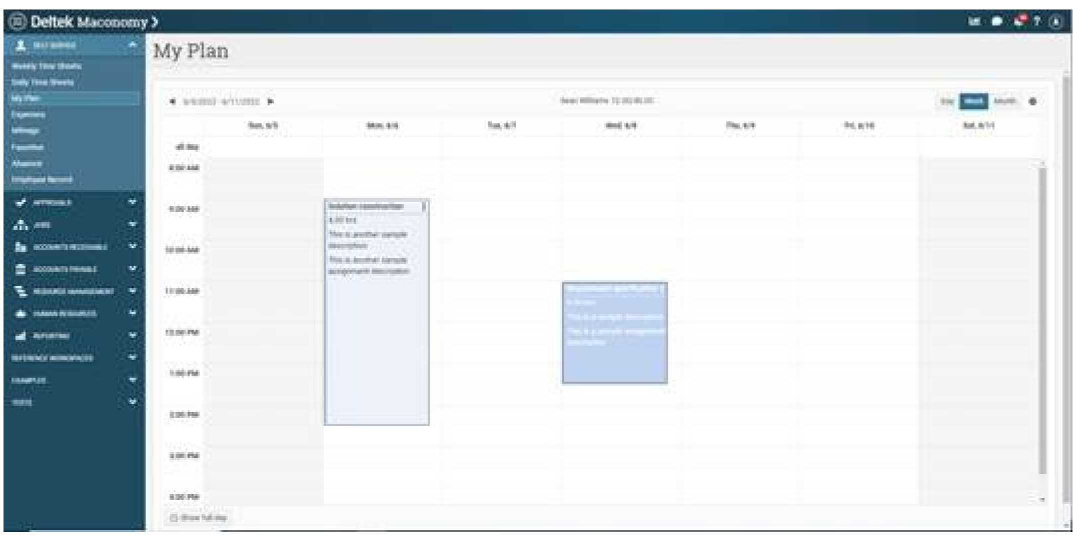
- MyPlan — Use this web site directly from a browser; this is the standalone web site.
- MyPlanWSC — Use this web site embedded in the Maconomy Workspace Client.
- MyPlanPortal — Use this web site embedded in the Maconomy Portal.

> **Note:** MyPlan in the Maconomy Portal is deprecated in 4.3. With People Planner 4.4, this will be removed altogether.
>
> Currently, the Maconomy Portal is available only when using Maconomy 2.5.x and older versions.

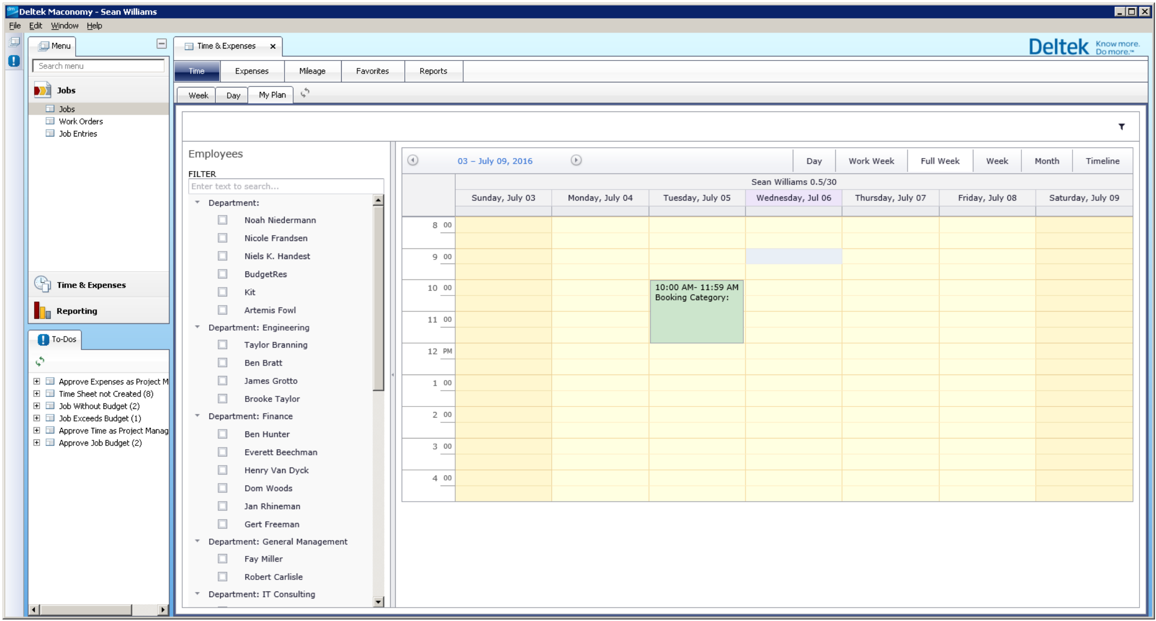
There are two important benefits of this split:

- You can configure each of the web sites to use its own type of authentication. For example, you can configure MyPlan for Windows Authentication and configure MyPlanWSC for Anonymous Authentication. It is thus no longer a choice between whether users should use MyPlan directly from a browser or embedded in the WSC.
- You can configure each of the web sites to use its own theme. This enables you to give MyPlan the Maconomy web client theme and MyPlanWSC the theme that is more neutral for being embedded in the WSC.

The following figure shows an example of MyPlan running directly from the browser and using the Maconomy web client theme.



The following figure shows MyPlan running embedded in WSC and using the DevEx theme that blends in with the WSC.



Note: In Maconomy 2.2.2 and later, it is recommended that you use MyPlan with SSI. See People Planner Silent Sign In for more information about how to set up SSI.

People Planner Web Components

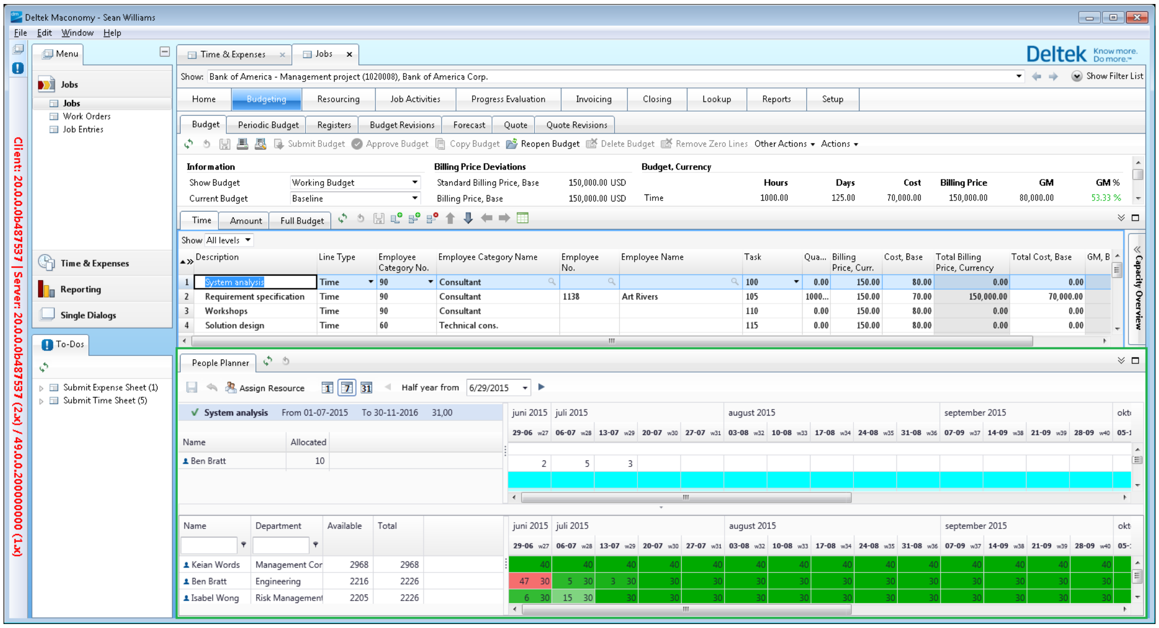
Tip: See the *Deltek People Planner Technical Installation Guide* for a description of how to embed the People Planner Web Components in the Maconomy WSC.

The People Planner Web Components was introduced in People Planner 3.6 and significantly expanded in People Planner 3.7 with support in Maconomy 2.4. It is specifically designed to run embedded in the WSC, but unlike MyPlan, you cannot run it directly from a browser.

The installer for the People Planner Web Components installs two web components. Together they make up the People Planner Web Components:

- Resourcing Overview, Budgeting Assistant, and Progress Evaluation Assistant – PMViewPage.aspx
- Resource Management – RMViewPage.asmx

The Planning Assistant shows you which employees have been assigned on each budget line, and for how many hours of work.



How the Integrations between People Planner and Maconomy Work

This section describes how the integrations work, and how to modify the behavior by changing the settings in the People Planner Admin Tool. A few tweaks also require work on the Maconomy side. For information about how to configure the web services, see Core Configuration of the Maconomy Integration.

The integration can be divided into two main types.

- The data transfers:
  - Importing master data from Maconomy to People Planner.
  - Importing projects, including budgets, from Maconomy to People Planner.
    - In Maconomy: Pushing a project from Maconomy to People Planner.
    - In People Planner: Importing one or more projects from Maconomy to People Planner.
  - Exporting favorites from People Planner to Maconomy.
  - Importing actuals—that is, time registrations—from Maconomy to People Planner.
  - Importing absences from Maconomy to People Planner.
  - Exporting ETCs from People Planner to Maconomy.
  - Exporting Periodic Budget from People Planner to Maconomy.
- The embedded People Planner components:
  - MyPlan.
  - People Planner Web Components.

Transfer Data between People Planner and Maconomy

You can import data from Maconomy to People Planner, either manually or automatically, by using tasks or Scheduled Tasks.

Consultants usually create and configure the Task Specifications and Scheduled Tasks as part of setting up the integration between People Planner and Maconomy.

There is an implicit order to how the data flows between Maconomy and People Planner. The subsections of this section have been arranged to reflect this.

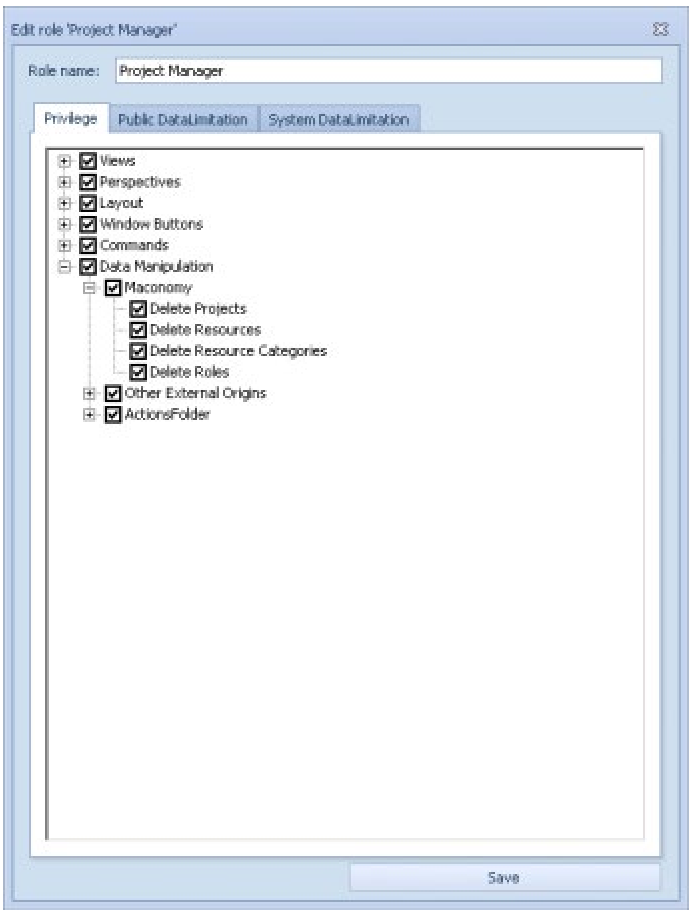
Import/Export	The Flow	For More Information
Import Master Data	Almost anything in People Planner involves master data to some degree.	Import Master Data from Maconomy
Import Calendars	Calendars are a part of Master Data, and they are imported along with the resources. With the calendars, you can see the capacities of the resources before booking them.	Import Calendars from Maconomy
Import Projects	▪ When the master data has been imported, you can import projects from Maconomy. ▪ When the projects have been imported into People Planner, you can then assign resources to the projects and start doing planning on projects.	Import Projects from Maconomy
Export Favorites	When resources have been booked on tasks, they eventually start working on them. To ease their time registration in Maconomy, People Planner can create the appropriate favorites.	Export Favorites to Maconomy
Import Absences	When employees put in a request for vacation or leave, these numbers can be imported into People Planner, and are reflected in the capacities of resources. This helps to avoid bookings of resources who are on vacation.	Import Absences from Maconomy to People Planner
Import Actuals	When employees have made their time registrations in Maconomy, People Planner can then import that data. This enables you to compare the original planning with the actual numbers from the project.	Import Actuals from Maconomy
Export ETCs	The planning numbers can be imported from People Planner into Maconomy and be used to provide	Export ETCs to Maconomy

Import/Export	The Flow	For More Information
	Estimates to Completion (ETC) numbers on a job.	
Export Resource Allocations	The planning numbers can be summarized on month-basis and be imported into Maconomy as the periodic budget.	Export Resource Allocations to Maconomy

Privileges for Preventing Deletion

Data that has been imported from Maconomy can be protected against deletion in People Planner.

This is controlled through the roles in People Planner; the privileges are found under Data Manipulation » Maconomy.



The available privileges are described in the following table.

Privilege	Description
Delete Projects	The user cannot delete a project or task that was imported from Maconomy
Delete Resources	The user cannot delete resources that were imported from Maconomy.

Privilege	Description
Delete Resource Categories	The user cannot delete resource categories that were imported from Maconomy.
Delete Roles	The user cannot delete a user group that was imported from Maconomy into People Planner as a role.

Import Master Data from Maconomy

Master data is the most basic data in People Planner and includes some very important data. The master data is often vital to other types of imports; for example, projects cannot be imported if the customers have not already been imported.

Usually the master data is defined in Maconomy and then imported into People Planner. This section describes how to do this.

For information about how the individual types of master data are mapped between Maconomy and People Planner, see Master Data Mapping.

Basics of Master Data Import

With a few exceptions, the imported master data is located in one of the views under Views » Dimensions.

The following table describes the most important master data and any rules that you should be aware of.

Name	Description
Activities	
Brands	Maconomy no longer supports brands.
BudgetTypes	People Planner must have imported the budget types from Maconomy before any projects can be imported.
BusinessAreas	
Calendar	Introduced in People Planner 3.8. Fixed Working Hours Calendars and Week Calendars are imported form Maconomy and translated to Work Week Hours Calendars and Common Calendars.
Companies	It is mandatory[9] to select a company when creating a project. You can create companies in People Planner, but when a project is imported from

[9] If the **Are Customer and Company mandatory fields in a Project** system setting has been deselected, these two types of master data can be omitted.

Name	Description
	Maconomy, the company must also have been imported from Maconomy.
ContactCompanies	
ContactCompanyBrands	
ContactCompanyProducts	
Customers	It is mandatory[9] to select a customer when creating a project. You can create customers in People Planner, but when a project is imported from Maconomy, the customer must also have been imported from Maconomy. Beginning with People Planner 3.8.5, you can choose between importing Customers using either the MaconomyWS Web service or using the Maconomy RESTful Web service.
Departments	Departments are imported as executing departments in People Planner.
JobGroups	
LocalSpecification#Lists	With People Planner 3.7, the import of LocalSpecifications and LocalSpecificationLists is expanded from 1-3 to 1-10.
LocalSpecification#s	
LocationResources	
Locations	
Products	Maconomy no longer supports products.
ResourceCategories	People Planner imports employee categories in Maconomy as resource categories. It has always been possible to import employee categories, but with the support for matrix budget beginning with People Planner 3.6 this has become more important.
Resources	

Name	Description
Roles	Without at least one associated role, a user is not allowed to log in to People Planner. **Note:** It is the groups in Maconomy that are imported as roles into People Planner. Although Maconomy 2.3 introduced a roles concept in Maconomy, these cannot be imported into People Planner.
SkillAssociations	
SkillLevels	
SkillLists	
Skills	
Specification#s	With People Planner version 3.7, the import of specifications is expanded from 2-3 to 2-10.
UserRoles	This is the relation between users and their roles. If it is not imported, the users do not have any roles and can therefore not log in to People Planner.
Users	A user is required to log in to People Planner. Users can be added to People Planner via the People Planner Admin Tool; they can be added in the users view, or they can be imported from Maconomy.

Customers

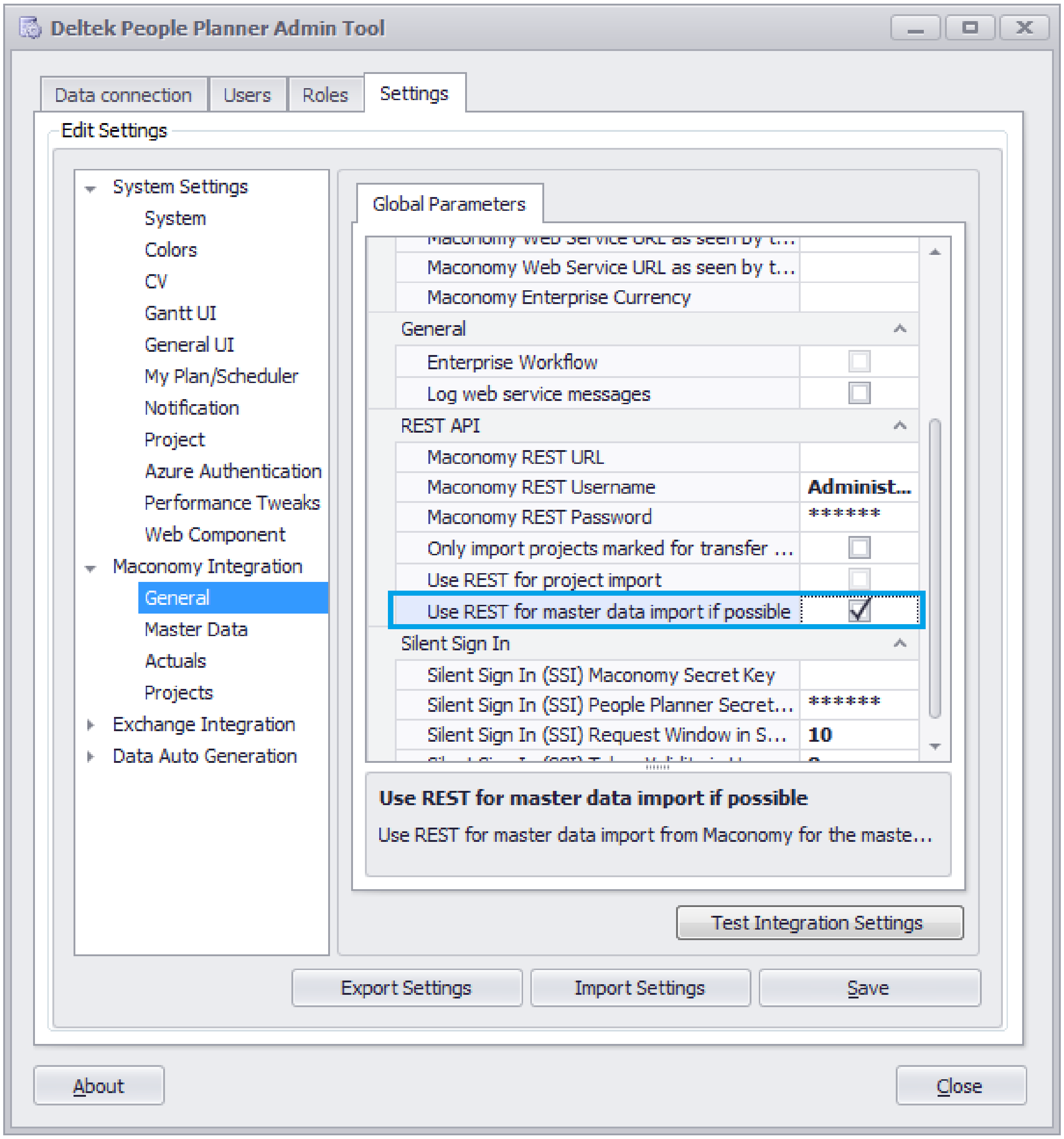
Customers are included in the master data that is imported using the MaconomyWS Web service.

Beginning with People Planner 3.8.5, you can choose to use the RESTful Web service to import Customers instead. This is an advantage if there are many Customers on the system—that is, too many for the MaconomyWS Web service to handle it. The disadvantage is that the Maconomy RESTful Web service cannot be configured using .I-files.

To control whether to continue using the MaconomyWS Web service or move to use the Maconomy RESTful Web service to import Customers, a new setting was added to the People Planner Admin Tool.

You can find this setting via: **Maconomy Integration » General » Use REST for master data import if possible.**

This setting only controls how Customers are imported.



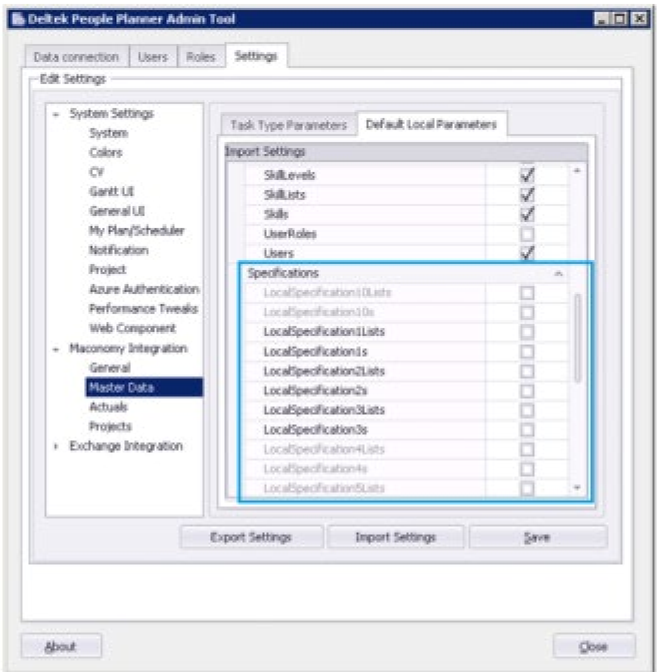
LocalSpecification4-10 and Specification4-10

Beginning with People Planner 3.7, the import of LocalSpecifications and Specifications has been expanded to include LocalSpecifications4-10 and Specifications4-10:

- The import of the original LocalSpecifications1-3 and Specifications2-3 uses the MaconomyWS web service.
- The import of the new dimensions, LocalSpecifications4-10 and Specifications4-10, uses the Maconomy RESTful web service.

Note: The import of LocalSpecifications4-10 and Specifications 4-10 requires Maconomy 2.4 or newer. These settings are disabled if the Maconomy installation is older than this.

You can configure which of the LocalSpecifications and Specifications should be imported by default in the People Planner Admin Tool. You can find them under Settings » Maconomy Integration » Master Data, in the Specifications subsection.



You can add the new LocalSpecifications and Specifications as columns in the Resources view, the Companies view, and in the PG.

For resources and companies, this has been implemented through an addition to the MaconomyWS web service. For events, you are required to import the projects through REST. This means that, if you have configured the URL for the Maconomy RESTful web service, but you have deselected the Use REST for Project Import checkbox, the new dimensions are imported, but they are not linked to the projects and tasks during project import.

Users

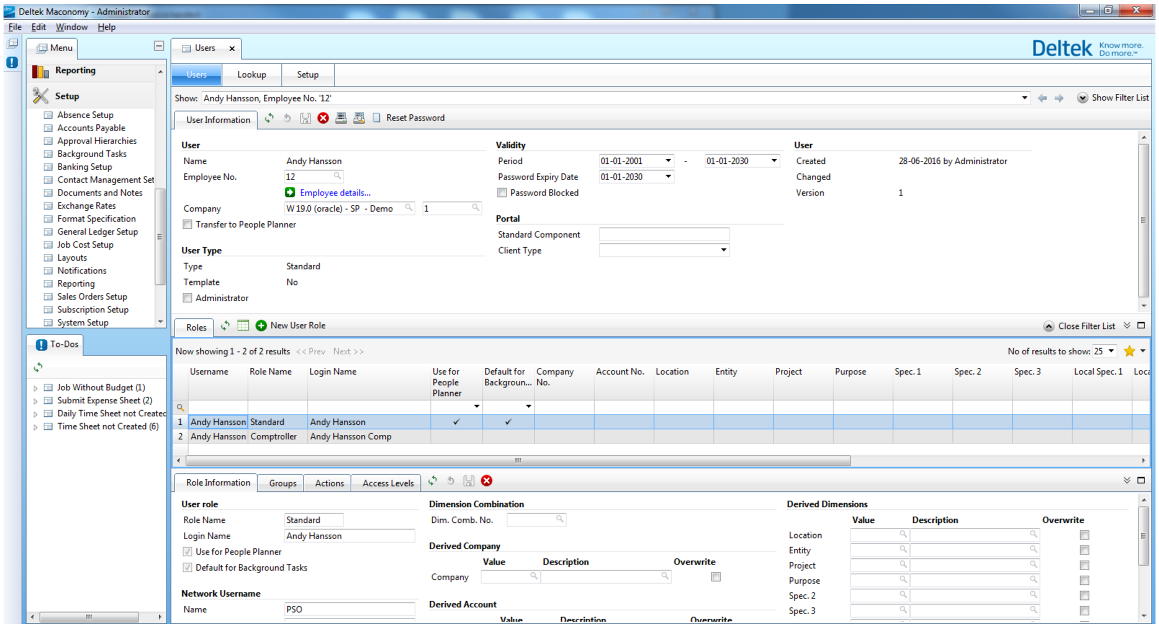
Users in Maconomy are imported as users in People Planner; if you have a Maconomy login, you also have a People Planner login.

Maconomy 2.3 introduced the concept of user roles.

> **Note:** User roles are not imported into People Planner. Although People Planner also has a concept of roles, and they—to some extent—can be imported from Maconomy, they are in reality imported from a different concept, called User Groups, in Maconomy.

In Maconomy, a user can have one or more roles. Each role is targeted for a specific type of work, and the user must log in as the role he or she needs for the task at hand.

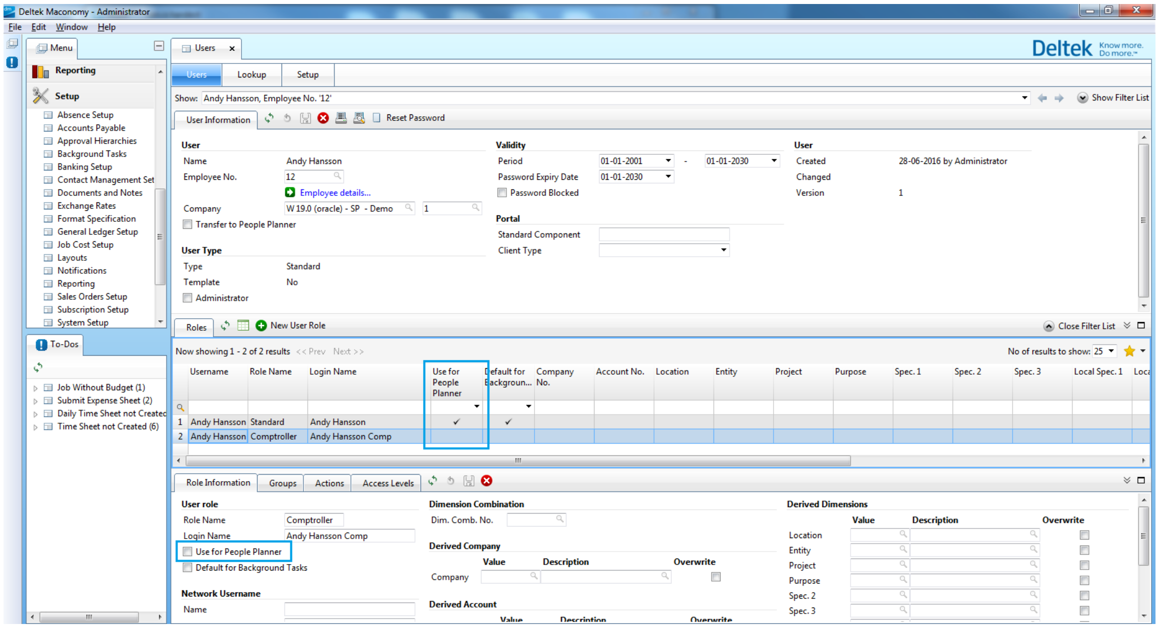
The following figure shows the user Andy Hanson. Andy has two roles, Standard and Comptroller, and he can switch between those when logging in.



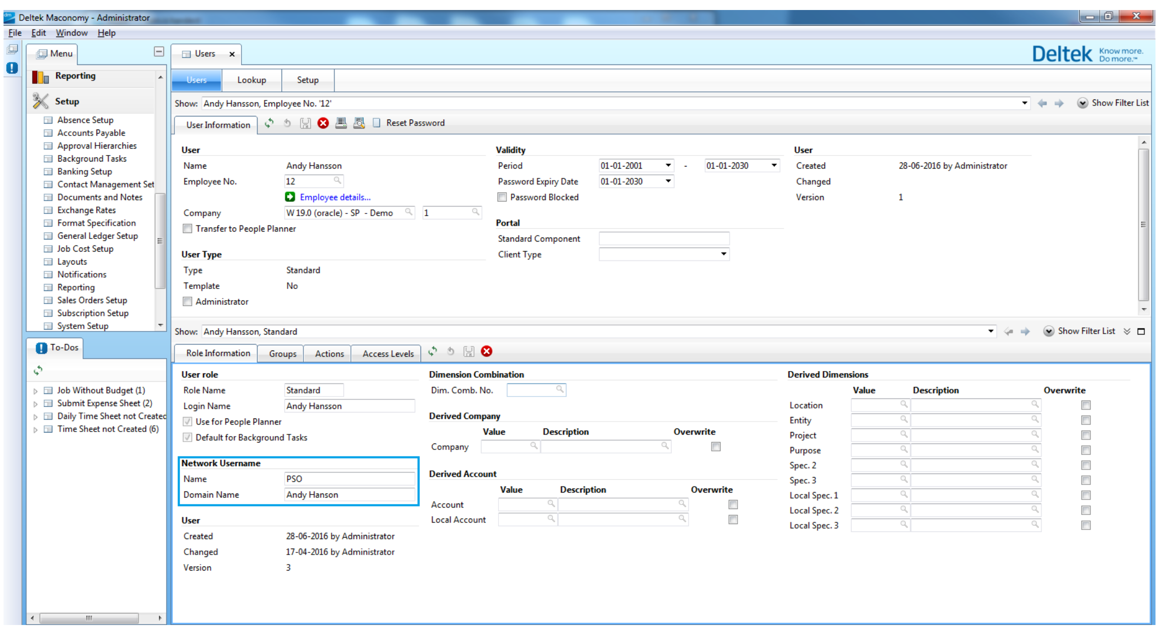
The Standard role is marked as Use for People Planner. Only one of the roles can be marked as Use for People Planner.

To choose another of the roles to use for People Planner:

1. Select the role.
2. Select the **Use for People Planner** checkbox.



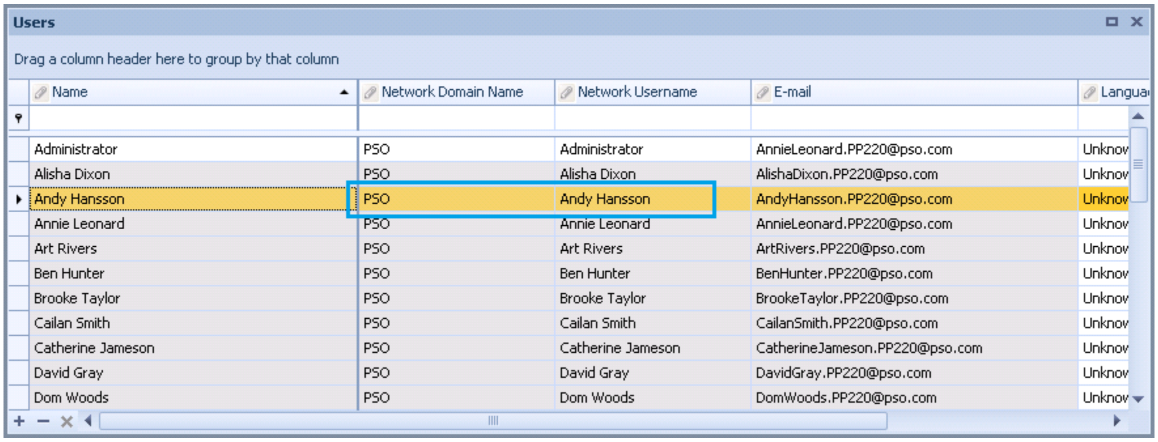
When People Planner imports users from Maconomy, part of this import is the Network Username.



Note: If you are running in a single-computer setup, the **Domain Name** field in the preceding figure can alternatively be set to the name of, or reference to, the local computer.

Different roles can have different values for the Network Username. This results in an ambiguity when People Planner imports users—which one should it use? This ambiguity is exactly the issue that the **Use for People Planner** setting resolves; only the Network Username of this role is imported into People Planner.

The Network Username from Maconomy is imported into People Planner in the two columns Network Domain Name and Network Username in Users.



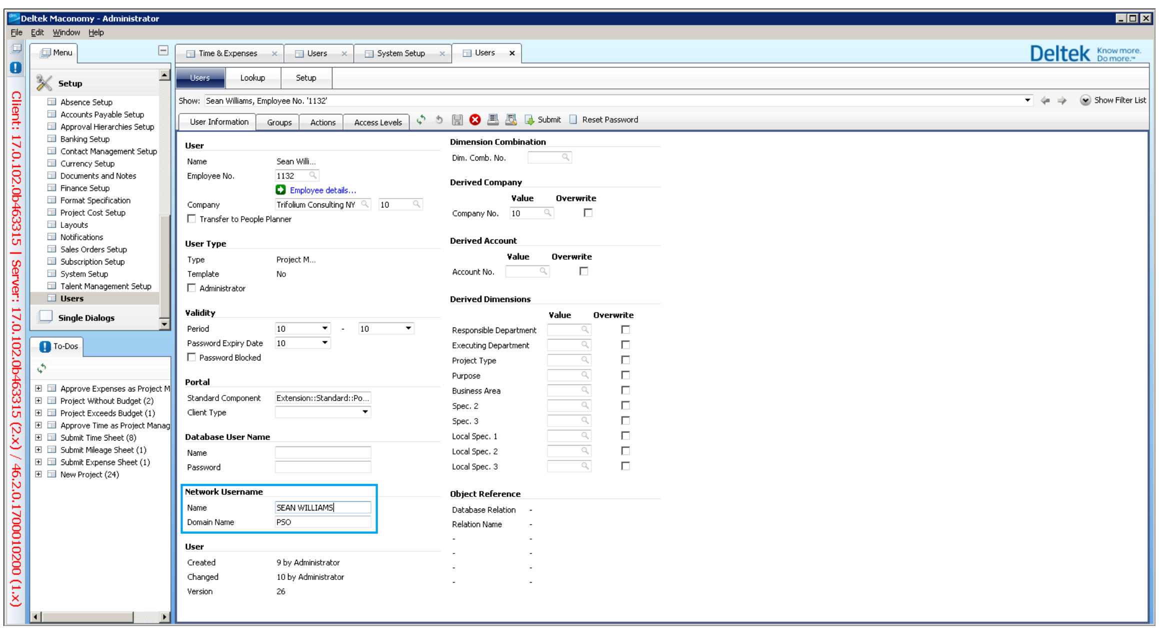
Users

Drag a column header here to group by that column

Name	Network Domain Name	Network Username	E-mail	Langua
Administrator	PSO	Administrator	AnnieLeonard.PP220@pso.com	Unknov
Alisha Dixon	PSO	Alisha Dixon	AlishaDixon.PP220@pso.com	Unknov
Andy Hansson	PSO	Andy Hansson	AndyHansson.PP220@pso.com	Unknov
Annie Leonard	PSO	Annie Leonard	AnnieLeonard.PP220@pso.com	Unknov
Art Rivers	PSO	Art Rivers	ArtRivers.PP220@pso.com	Unknov
Ben Hunter	PSO	Ben Hunter	BenHunter.PP220@pso.com	Unknov
Brooke Taylor	PSO	Brooke Taylor	BrookeTaylor.PP220@pso.com	Unknov
Cailan Smith	PSO	Cailan Smith	CailanSmith.PP220@pso.com	Unknov
Catherine Jameson	PSO	Catherine Jameson	CatherineJameson.PP220@pso.com	Unknov
David Gray	PSO	David Gray	DavidGray.PP220@pso.com	Unknov
Dom Woods	PSO	Dom Woods	DomWoods.PP220@pso.com	Unknov

Note: If Maconomy has been configured to use Silent Sign In with People Planner, only the role that is marked as Use for People Planner can access the embedded MyPlan or People Planner Web Component. If the user is logged in with a different role, Maconomy attempts to get an SSI token for the user, but presents People Planner with a Network Username that People Planner does not recognize.

Before Maconomy 2.3, user roles did not exist. Instead, the Network Username was a property directly on the user.



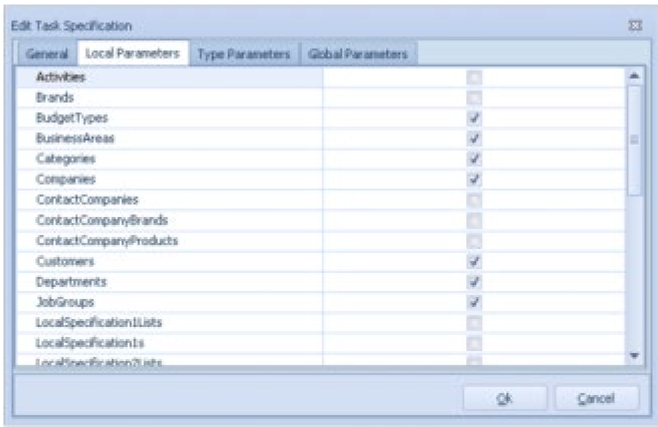
Note: In the PSO demo systems, the Network Username fields are empty for all users. Instead, the MaconomyWS Web Service has been customized to “cheat” and fill in these fields from a different source. As a result, the SSI does not work in the PSO demo systems before you manually enter the missing Network Username under the relevant demo users.

Import Master Data Using a Task

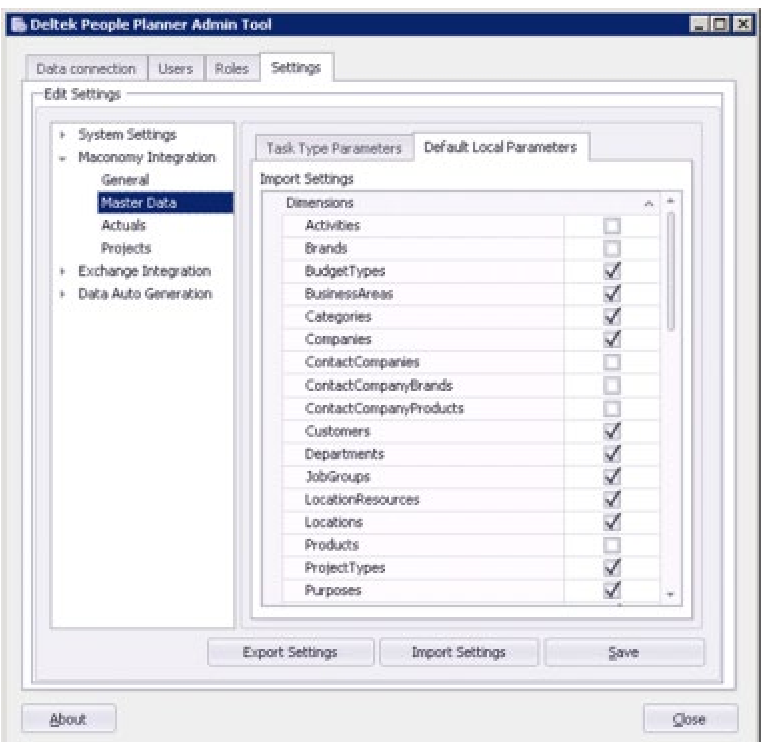
You can import Master Data by creating a Task Specification. See Tasks for more information about Task Specifications and Scheduled Tasks.

Local Parameters

The Local Parameters tab of the Task Specification determines which of the master data is imported. In the following example, some of the master data is marked to be imported, while other data has been omitted.



The system settings in the People Planner Admin Tool serve as the default selection when you create a Task Specification.



Tip: Existing Task Specifications are not changed if you edit the settings in the Admin Tool; instead, you can modify them by editing them directly in the Task Specification. This makes it possible to have several Task Specifications that import different master data. You can then create Scheduled Tasks that run often or not as often, depending on how frequently the specific master data is being changed in Maconomy.

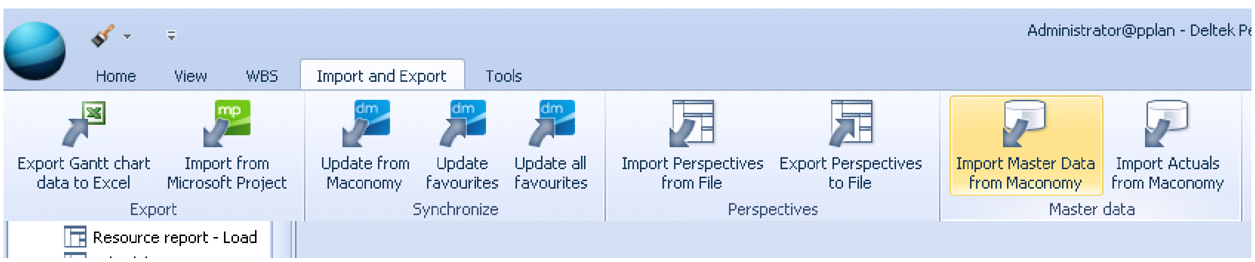
Task Type Parameters

You can only set the settings in the Type Parameters tab from the People Planner Admin Tool, and they are universal for all tasks to import Master Data.

Should IsBlocked field be controlled by Maconomy — When a user is blocked in Maconomy—that is, the user is not allowed to log in to Maconomy—and this setting is selected, the user and the associated resource are also blocked in People Planner.

Import Master Data using the Ribbon

You can also import master data directly by clicking the **Import Master Data from Maconomy** button in the Ribbon.



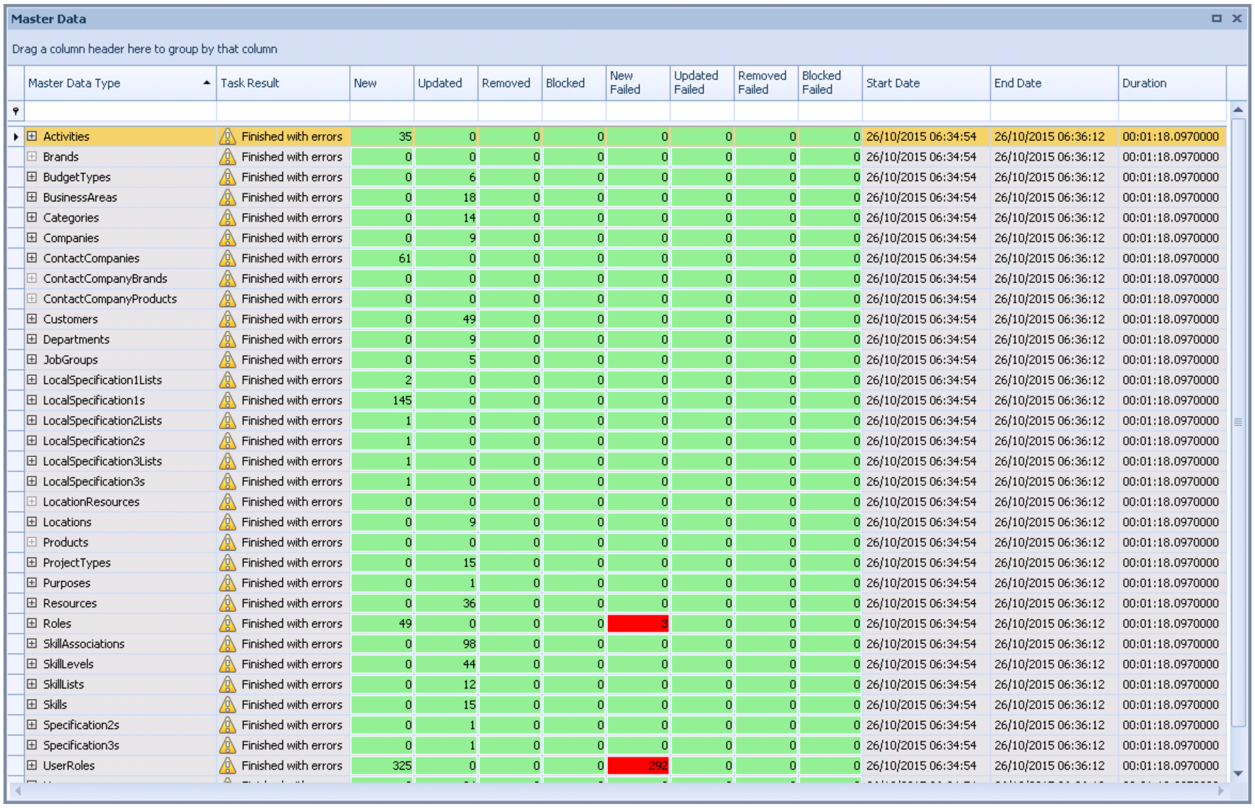
You are first asked to select which Master data to import before the import is executed.

When you import Master Data in this way, People Planner creates a System Task Specification and runs that. See System Task Specification.

Data-Centric View for Importing Master Data

The data-centric view for Master Data import summarizes what master data was imported and whether there were any problems.

This view is located at **Views** » **Tasks** » **Import Results** » **Master Data**.

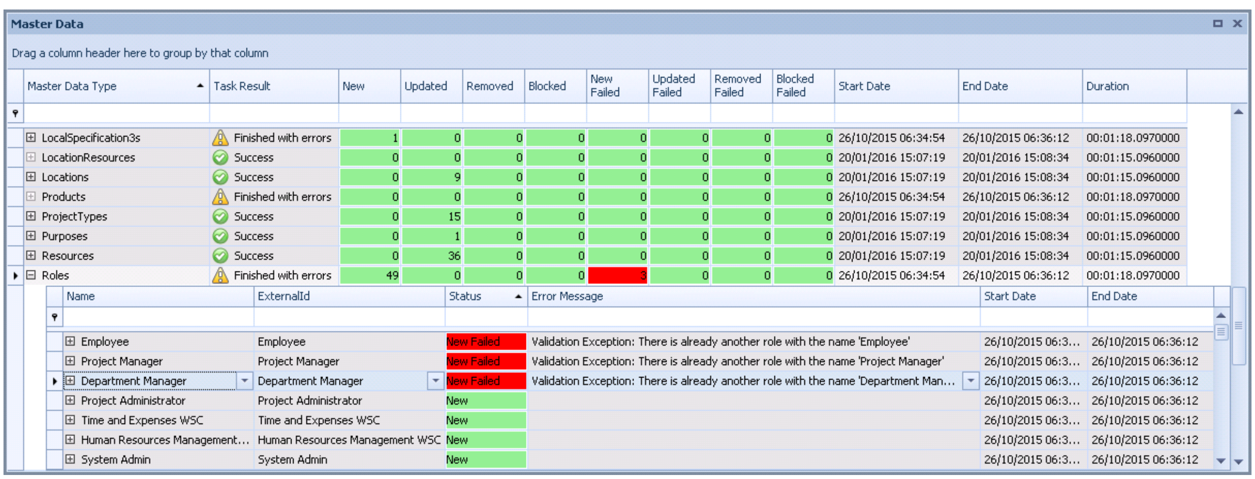


Master Data

Drag a column header here to group by that column

Master Data Type	Task Result	New	Updated	Removed	Blocked	New Failed	Updated Failed	Removed Failed	Blocked Failed	Start Date	End Date	Duration
Activities	Finished with errors	35	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Brands	Finished with errors	0	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
BudgetTypes	Finished with errors	0	6	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
BusinessAreas	Finished with errors	0	18	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Categories	Finished with errors	0	14	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Companies	Finished with errors	0	9	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
ContactCompanies	Finished with errors	61	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
ContactCompanyBrands	Finished with errors	0	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
ContactCompanyProducts	Finished with errors	0	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Customers	Finished with errors	0	49	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Departments	Finished with errors	0	9	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
JobGroups	Finished with errors	0	5	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocalSpecification1Lists	Finished with errors	2	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocalSpecification1s	Finished with errors	145	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocalSpecification2Lists	Finished with errors	1	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocalSpecification2s	Finished with errors	1	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocalSpecification3Lists	Finished with errors	1	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocalSpecification3s	Finished with errors	1	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocationResources	Finished with errors	0	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Locations	Finished with errors	0	9	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Products	Finished with errors	0	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
ProjectTypes	Finished with errors	0	15	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Purposes	Finished with errors	0	1	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Resources	Finished with errors	0	36	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Roles	Finished with errors	49	0	0	0	3	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
SkillAssociations	Finished with errors	0	98	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
SkillLevels	Finished with errors	0	44	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
SkillLists	Finished with errors	0	12	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Skills	Finished with errors	0	15	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Specification2s	Finished with errors	0	1	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
Specification3s	Finished with errors	0	1	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
UserRoles	Finished with errors	325	0	0	0	292	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000

You can examine errors by expanding individual rows.



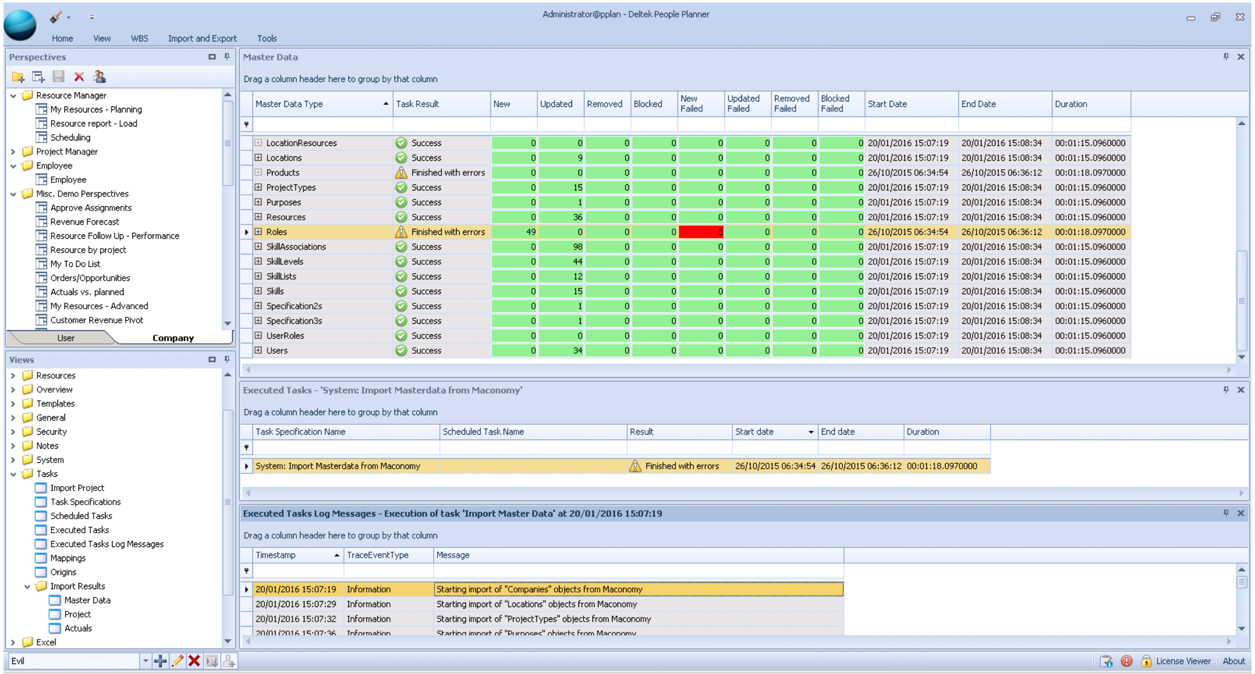
Master Data

Drag a column header here to group by that column

Master Data Type	Task Result	New	Updated	Removed	Blocked	New Failed	Updated Failed	Removed Failed	Blocked Failed	Start Date	End Date	Duration
LocalSpecification3s	Finished with errors	1	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
LocationResources	Success	0	0	0	0	0	0	0	0	20/01/2016 15:07:19	20/01/2016 15:08:34	00:01:15.0960000
Locations	Success	0	9	0	0	0	0	0	0	20/01/2016 15:07:19	20/01/2016 15:08:34	00:01:15.0960000
Products	Finished with errors	0	0	0	0	0	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000
ProjectTypes	Success	0	15	0	0	0	0	0	0	20/01/2016 15:07:19	20/01/2016 15:08:34	00:01:15.0960000
Purposes	Success	0	1	0	0	0	0	0	0	20/01/2016 15:07:19	20/01/2016 15:08:34	00:01:15.0960000
Resources	Success	0	36	0	0	0	0	0	0	20/01/2016 15:07:19	20/01/2016 15:08:34	00:01:15.0960000
Roles	Finished with errors	49	0	0	0	3	0	0	0	26/10/2015 06:34:54	26/10/2015 06:36:12	00:01:18.0970000

Name	ExternalId	Status	Error Message	Start Date	End Date
Employee	Employee	New Failed	Validation Exception: There is already another role with the name 'Employee'	26/10/2015 06:3...	26/10/2015 06:36:12
Project Manager	Project Manager	New Failed	Validation Exception: There is already another role with the name 'Project Manager'	26/10/2015 06:3...	26/10/2015 06:36:12
Department Manager	Department Manager	New Failed	Validation Exception: There is already another role with the name 'Department Man...	26/10/2015 06:3...	26/10/2015 06:36:12
Project Administrator	Project Administrator	New		26/10/2015 06:3...	26/10/2015 06:36:12
Time and Expenses WSC	Time and Expenses WSC	New		26/10/2015 06:3...	26/10/2015 06:36:12
Human Resources Management...	Human Resources Management WSC	New		26/10/2015 06:3...	26/10/2015 06:36:12
System Admin	System Admin	New		26/10/2015 06:3...	26/10/2015 06:36:12

You can combine the data-centric view with the execution log views in much the same way as for scheduled tasks (see Execution Logs).



Import Calendars from Maconomy

With People Planner 3.8 and newer, you can import current calendars from Maconomy into People Planner. Prior to 3.8.6, People Planner only supported a single calendar per resource, and the import imported the current calendar revision.

Beginning with version 3.8.6, People Planner imports fixed work-week hours from Maconomy for all revisions and supports change of Work Week Hours over time in People Planner.

The calendars are imported as a step in the import of Master Data, but this import is described here because of the added complexity.

For an alternative way to import calendars, using an import mapping, see Import Calendars.

Calendars

Both People Planner and Maconomy have calendars. However, they do not work in exactly the same manner in the two systems. The calendar import attempts to translate Maconomy's calendars into People Planner's calendars in the best possible way, given the complication that they are not 100% compatible.

An additional consideration is the performance of calendars in People Planner; because of this, the calendar import attempts to reuse the imported calendars as much as possible, both to minimize the memory usage and to speed up calendar-related calculations, such as calculating the capacity of the resources.

To understand how the calendars are imported into People Planner, you must first understand how the two systems implement their calendars.

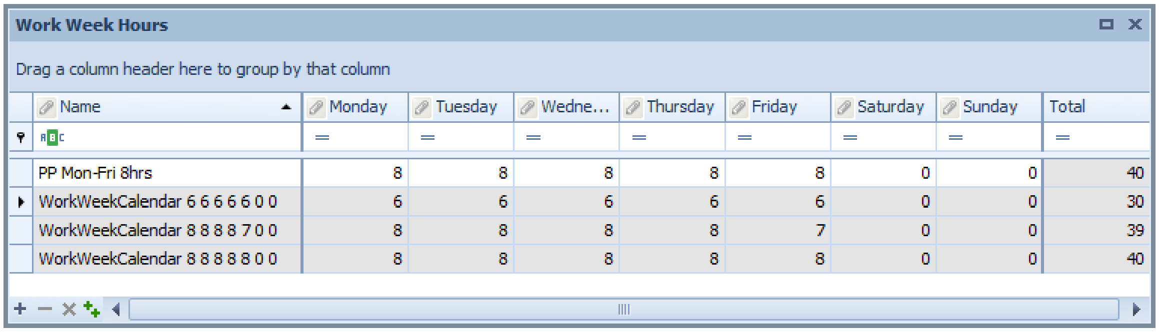
Calendars in People Planner

People Planner operates with three types of calendars:

- Work Week Hours Calendars

- Common Calendars
- Individual Calendars or Resource Calendars

The **Work Week Hours Calendars** describe how many working hours there are on each of the seven days in the week.

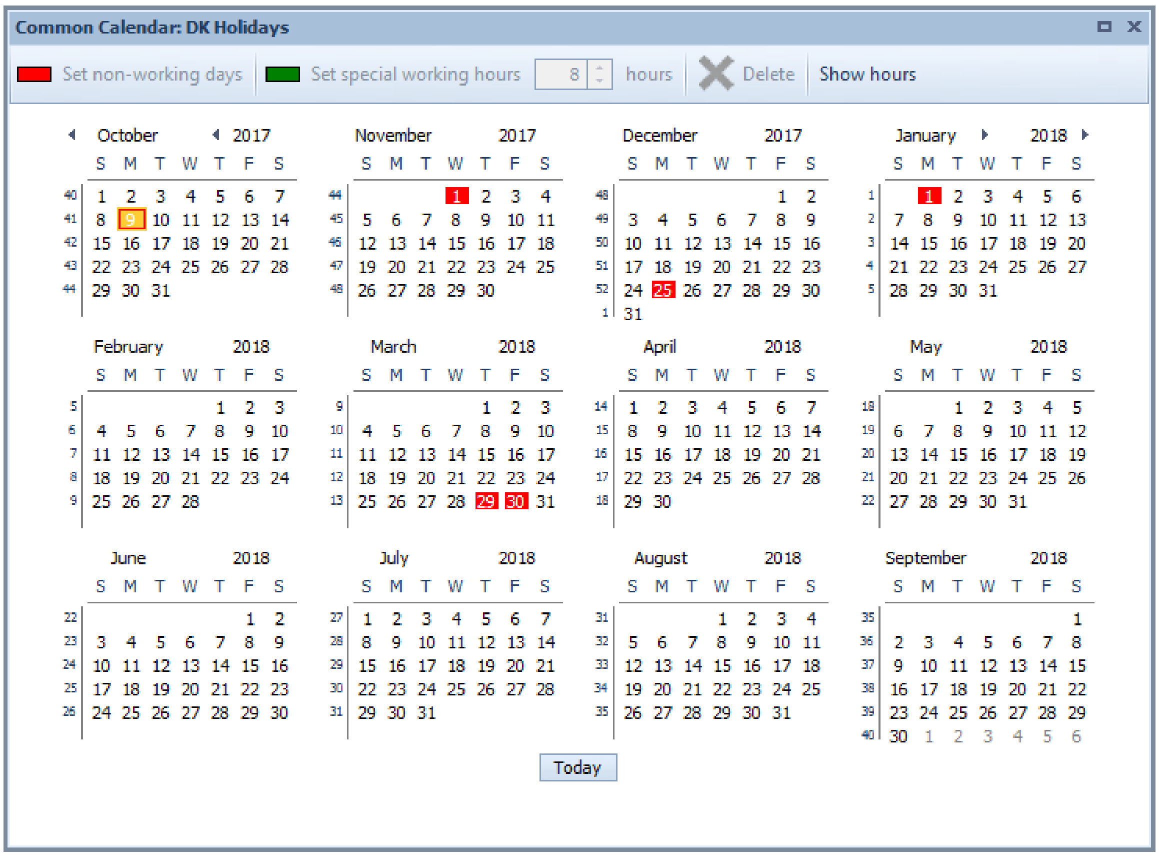


Work Week Hours

Drag a column header here to group by that column

Name	Monday	Tuesday	Wedne...	Thursday	Friday	Saturday	Sunday	Total
PP Mon-Fri 8hrs	8	8	8	8	8	0	0	40
WorkWeekCalendar 6 6 6 6 6 0 0	6	6	6	6	6	0	0	30
WorkWeekCalendar 8 8 8 8 7 0 0	8	8	8	8	7	0	0	39
WorkWeekCalendar 8 8 8 8 8 0 0	8	8	8	8	8	0	0	40

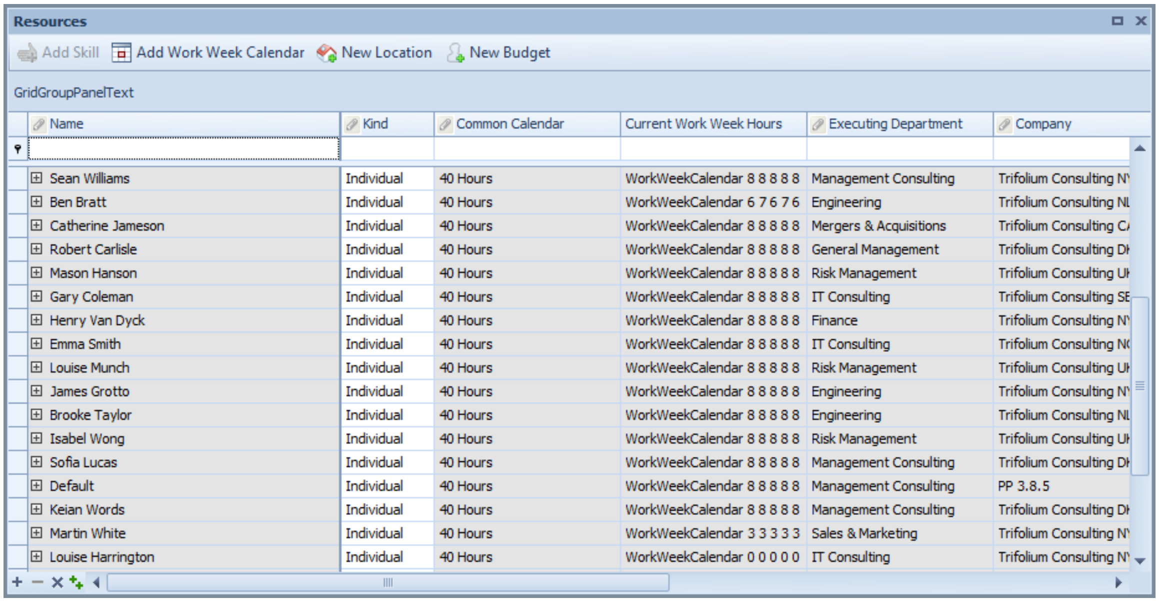
The **Common Calendars** contain the national holidays. Each is an ongoing calendar with the option to add an entry per date—either as a **non-working** day or as a **special-working-hours** day, for example, where half the day is off.



The Common Calendars do not need to mark the weekends as non-working days because this is already covered by the Work Week Hours Calendars.

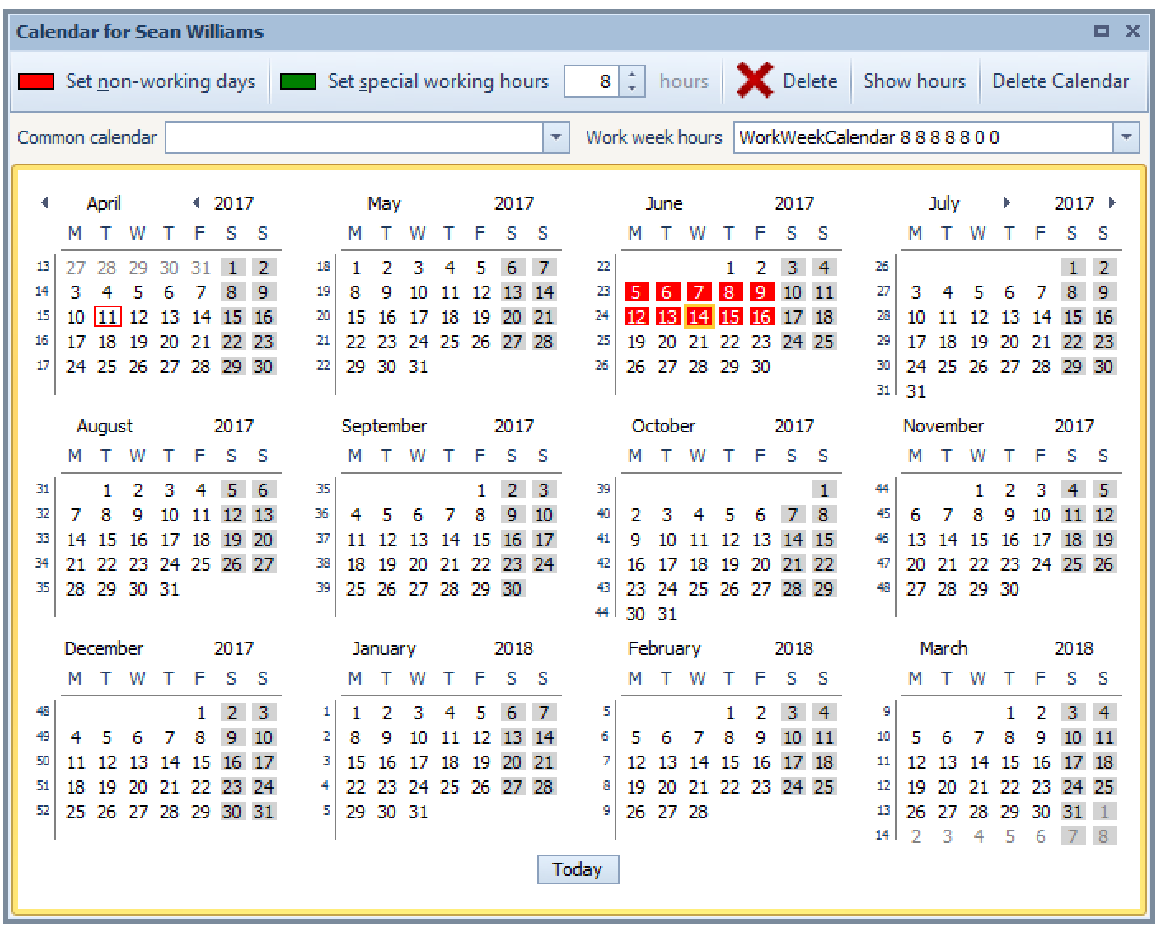
Note: For performance considerations, you should actively avoid having entries in the Common Calendars that are not strictly required—for example, avoid having entries for weekends.

In People Planner, the Work Week Calendars and the Common Calendars can be shared among many resources.



Name	Kind	Common Calendar	Current Work Week Hours	Executing Department	Company
Sean Williams	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Management Consulting	Trifolium Consulting N'
Ben Bratt	Individual	40 Hours	WorkWeekCalendar 6 7 6 7 6	Engineering	Trifolium Consulting NI
Catherine Jameson	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Mergers & Acquisitions	Trifolium Consulting C/
Robert Carlisle	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	General Management	Trifolium Consulting DI
Mason Hanson	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Risk Management	Trifolium Consulting UI
Gary Coleman	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	IT Consulting	Trifolium Consulting SE
Henry Van Dyck	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Finance	Trifolium Consulting N'
Emma Smith	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	IT Consulting	Trifolium Consulting N(
Louise Munch	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Risk Management	Trifolium Consulting UI
James Grotto	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Engineering	Trifolium Consulting N'
Brooke Taylor	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Engineering	Trifolium Consulting NI
Isabel Wong	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Risk Management	Trifolium Consulting UI
Sofia Lucas	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Management Consulting	Trifolium Consulting DI
Default	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Management Consulting	PP 3.8.5
Keian Words	Individual	40 Hours	WorkWeekCalendar 8 8 8 8 8	Management Consulting	Trifolium Consulting DI
Martin White	Individual	40 Hours	WorkWeekCalendar 3 3 3 3 3	Sales & Marketing	Trifolium Consulting N'
Louise Harrington	Individual	40 Hours	WorkWeekCalendar 0 0 0 0 0	IT Consulting	Trifolium Consulting N'

Each resource can also have an **Individual Calendar**, where you can note special days off for the resource, such as maternity leave. Individual Calendars are unique and cannot be shared among resources, but otherwise, they function exactly as the Common Calendars.



> **Note:** An alternative to using Individual Calendars is to book the resource on an Absence task. This performs better, and you should avoid using Individual Calendars if possible.

When calculating the working hours (capacity) of a resource on a given date, the three calendars are prioritized and combined as follows. The calculation depends on whether the Common Calendar has its origin in Maconomy or not.

When the common calendar does not have its origin in Maconomy:

1. If the Individual Calendar exists and has an entry for the date, this entry is used.
2. Otherwise, if the resource has a Common Calendar, and it has an entry for the date, this entry is used.
3. Otherwise, if the resource has a Work Week Hours calendar, and it has an entry for the date, this entry is used.

If the Common Calendar has its origin in Maconomy, the prioritization is a little different to make the integration better:

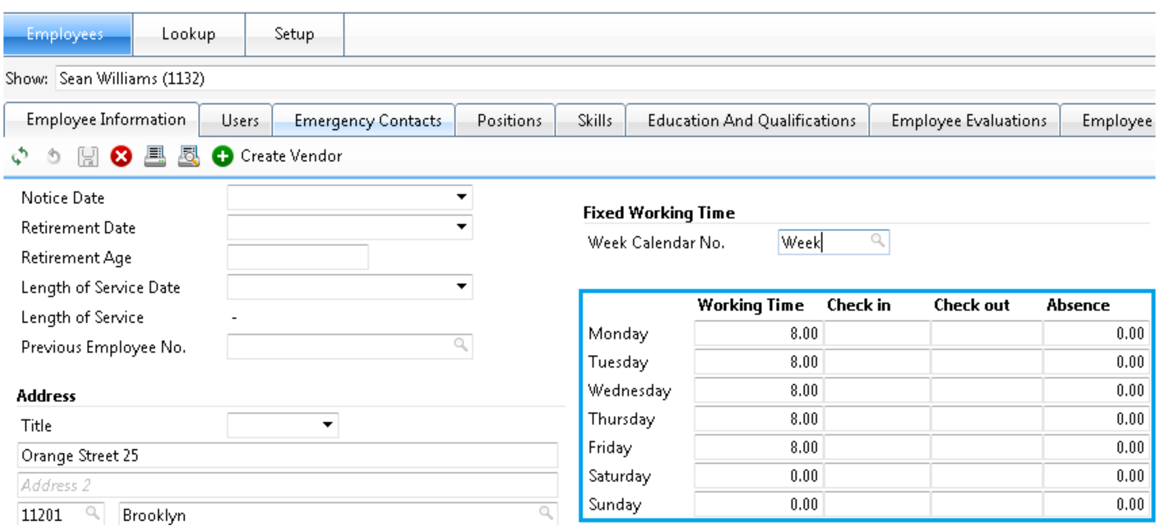
1. If the Individual Calendar exists and has an entry for the date, this entry is used.
2. Otherwise, if the resource has a Common Calendar but no Work Week Hours calendar, and it has an entry for the date, this entry is used.
3. Otherwise, if the resource has a Work Week Hours calendar, but no Common Calendar, and it has an entry for the date, this entry is used.
4. If the resource has both a Common Calendar and a Work Week Hours calendar, the lowest value for the two calendars is used.

Calendars in Maconomy

Maconomy uses two types of calendars:

- Fixed Working Time Calendars
- Week Calendars

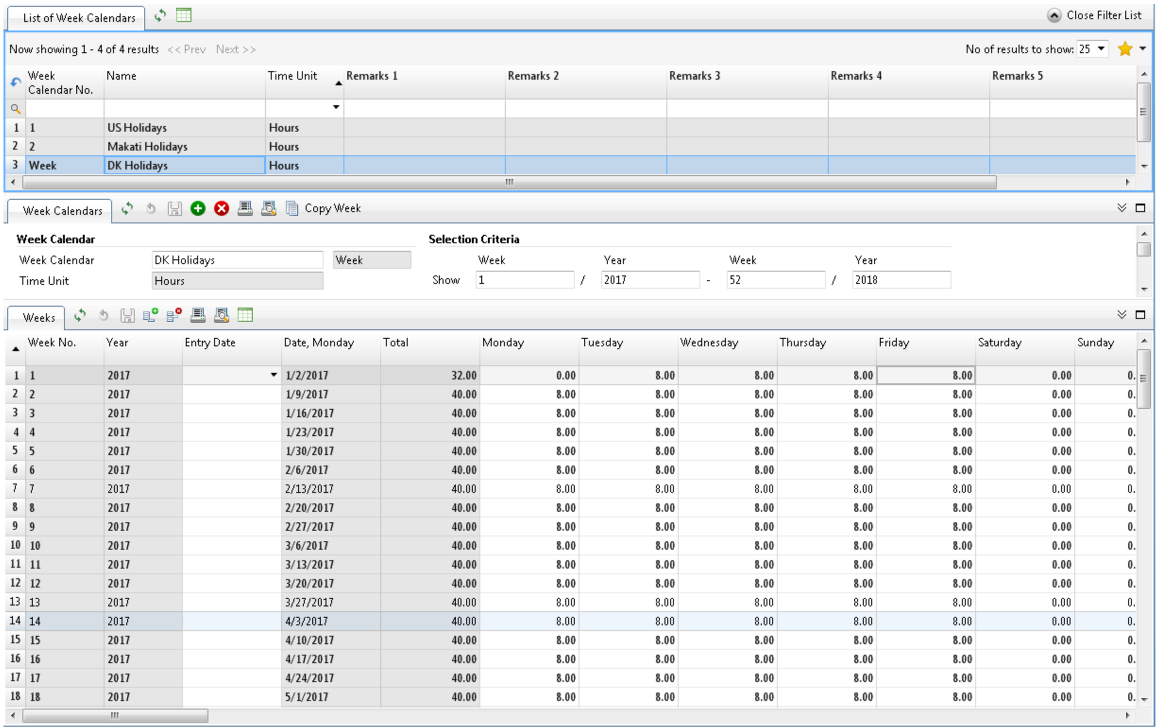
The **Fixed Working Time Calendars** describe how many working hours there are on each of the seven days in the week.



In contrast to the Work Week Hours Calendars in People Planner, the Maconomy Fixed Working Hours Calendar is not shared among employees—that is, each employee has his or her own

Fixed Working Time Calendar.

The **Week Calendars** contain the national holidays. Each is an ongoing calendar with an entry for each date.



Just as it was the case for the Common Calendars in People Planner, the Maconomy Week Calendars can be shared among multiple employees in Maconomy.

When calculating the working hours (capacity) of an employee on a given date, the two calendars are compared, and the capacity is calculated as the lowest value from the two calendars (similar to how the calculation is done in People Planner if the Common Calendar has its origin in Maconomy).

> **Note:** Maconomy also has the concept of a **Holiday Calendar**, but that calendar is not used in the calculation of working hours for employees. Instead, the Holiday Calendar is used to calculate the correct payment day for bills that are sent out in the region or country.

Mapping Calendars from Maconomy to People Planner

In Maconomy, the calendars can change with time; the Fixed Working Hours of an employee can change, and which Week Calendar the employee has assigned can change. Only the change of Fixed Working Hours is supported in People Planner; if you change the Week Calendars there, these changes are also applied globally—that is, the changes are also applied to the past.

Because of this, each execution of the calendar import only looks at the current Week Calendar.

The calendar import creates both Work Week Hours Calendars and Common Calendars in People Planner, but it does not create any Individual Calendars.

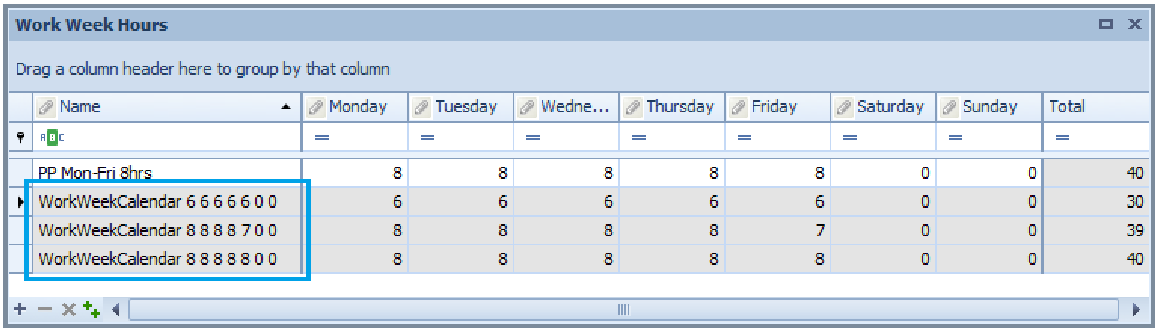
Mapping the Fixed Working Hours Calendars

Calendars are imported as a part of the Master Data import, and at the point where the employees in Maconomy are imported as resources into People Planner.

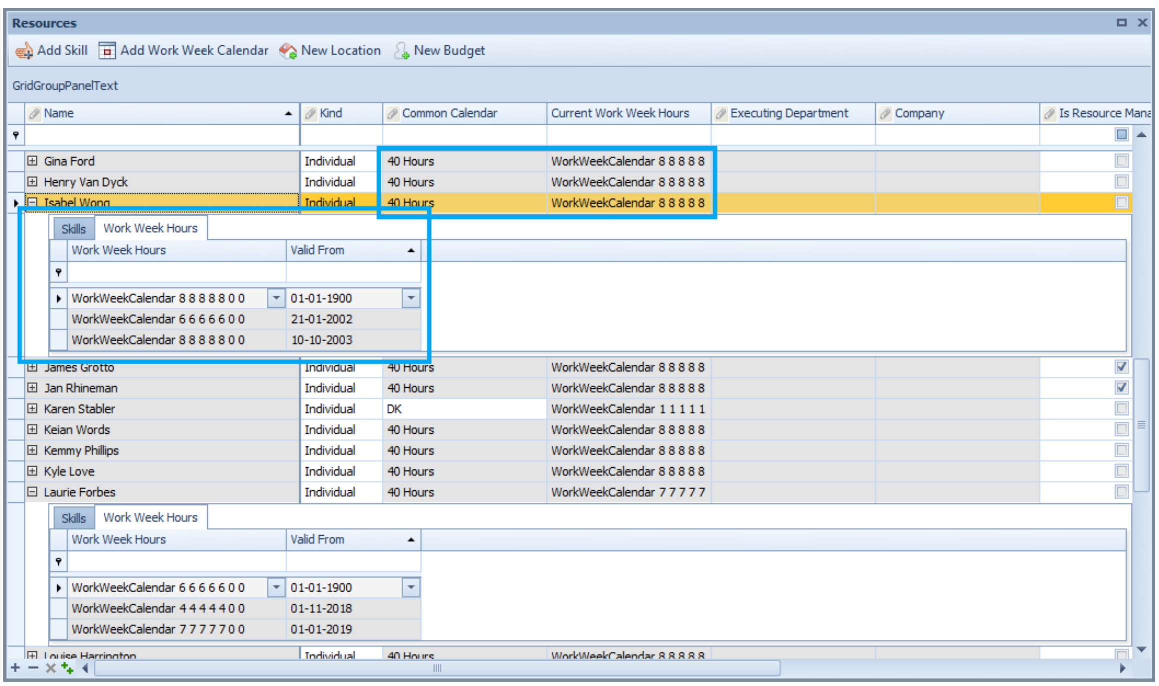
For each employee, the hours of the Fixed Working Hours Calendar are compared to People Planner's list of Work Week Hours Calendars:

- If People Planner already has a Work Week Hours Calendar that matches the hours of the Fixed Working Hours Calendar, this Work Week Hours Calendar is assigned to the resource with a valid from date matching the revision start from Maconomy.
- If People Planner does not have a Work Week Hours Calendar that matches, one is created, and this Work Week Hours Calendar is then assigned to the resource with a valid from date matching the revision start from Maconomy.

People Planner names the imported Work Week Hours Calendars according to the number of hours that they list.



Assigned to the resources, the calendars might look like the following example.



Understanding the Valid From Date

Each resource can have a list of Work Week calendars. Each of those Work Week calendars has a Valid From date, but no “valid until” date. You can think of the Valid From date as the start date of a calendar. Each Work Week calendar is used starting with its Valid From date, and until the Valid From date of the next Work Week calendar sequentially, in date order. When you import calendars, a resource might get multiple calendars, each with a different Valid From date.

The following shows an example.

Calendar 1	Calendar 2	Calendar 3
Valid From 01/01/2019	**Valid From 05/01/2019**	**Valid From 11/01/2019**
Working 5 days, 8 hours per day	Working 4 days, 7 hours per day	Working 5 days, 7 hours per day

Calendar 1 is used from 1/1/2019 until 5/1/2019
Calendar 2 is used from 5/1/2019 until 11/1/2019
Calendar 3 is used from 11/1/2019

Mapping the Week Calendars

When all employees and their Fixed Working Hours Calendars have been imported into People Planner, and a list of Work Week Hours Calendars has been created and assigned to the resources, the calendar import imports the Week Calendars and creates a list of Common Calendars as described in the following.

For each Week Calendar, People Planner first compares the Work Week Hours Calendars of all of the employees who share this Week Calendar. Based on this, People Planner calculates the maximum numbers of working hours for each weekday. Because the Work Week Hours calendar can change over time for all resources, the maximum number of hours is calculated for each period between changes of Work Week Hours calendars.

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
Employee1	8	8	8	8	7	0	0
Employee2	6	6	6	6	6	0	0
Employee3	8	8	8	8	0	0	0
Employee4	8	8	8	8	7	0	0
Employee5	8	8	8	8	7	0	0
Maximum	8	8	8	8	7	0	0

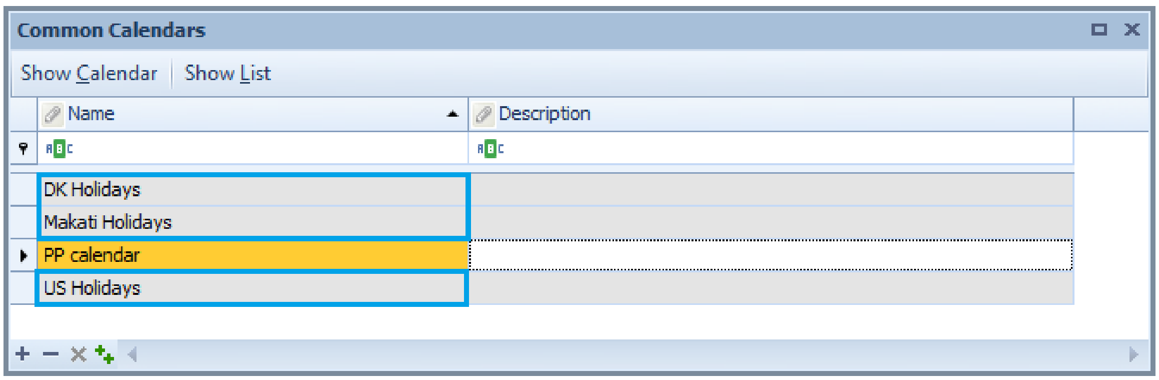
The maximums are then compared to the Week Calendar, and a Common Calendar is created from this:

- If the number of working hours in the Week Calendar is greater than or the same as the maximum, no entry is added to the Common Calendar.
- If the number of working hours in the Week Calendar is less than the maximum, an entry is added in the Common Calendar.

Example

	M	T	W	T	F	S	S	M	T	W	T	F	S	S	M	T	W	T	F	S	S
Work Week Hour Maximum	8	8	8	8	8	0	0	8	8	8	8	7	0	0	8	8	8	8	7	0	0
Week Calendar	8	8	8	8	8	0	0	8	4	8	8	7	0	0	8	8	0	8	8	0	0
Common Calendar	-	-	-	-	-	-	-	-	4	-	-	-	-	-	-	-	0	-	-	-	-

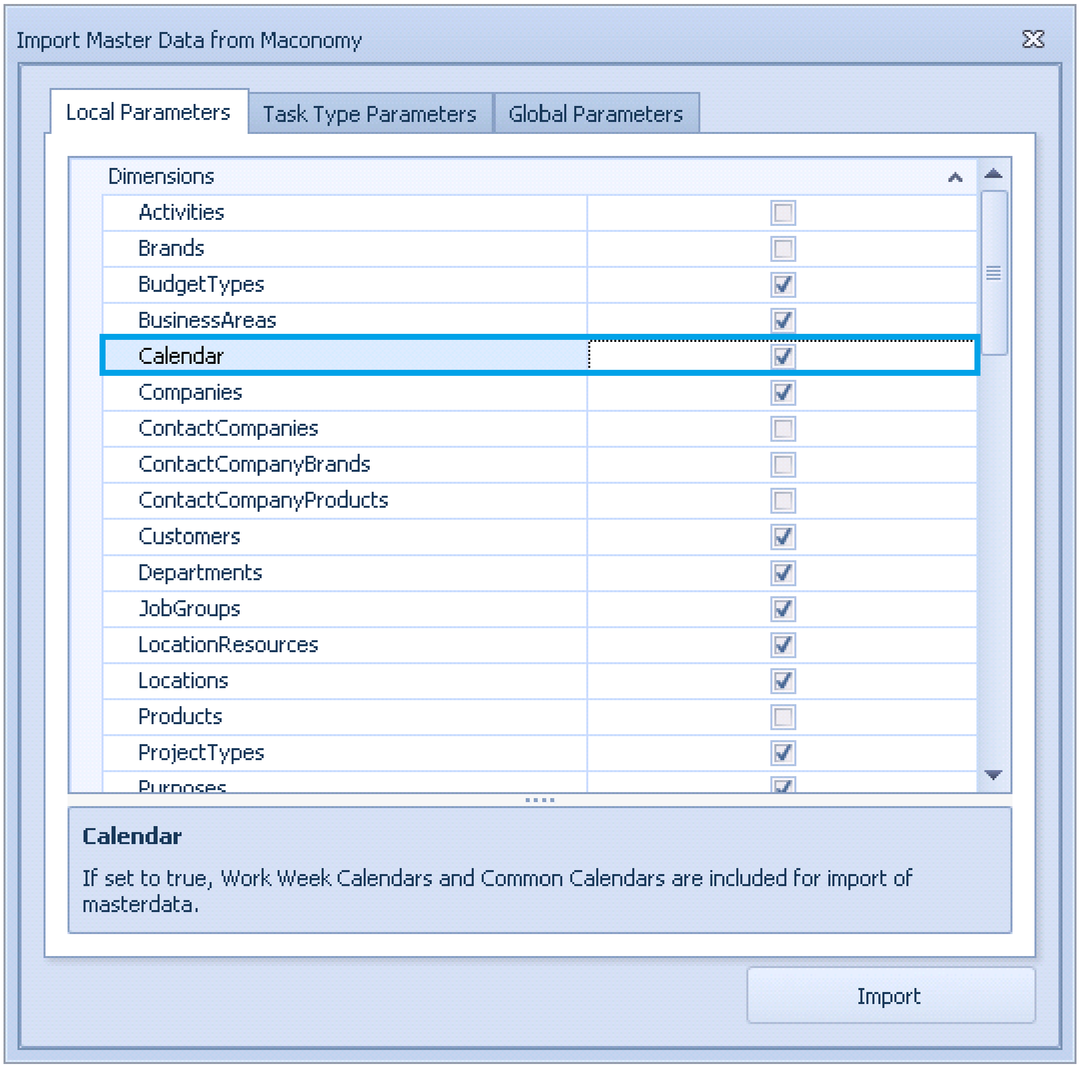
The imported Common Calendars get their names from Maconomy.



Import Calendars using a Task

The calendars are imported as an integral part of the Master Data import, and they are handled through Task Specifications and Scheduled Tasks, which are described elsewhere.

A **Calendar** checkbox was added as of People Planner 3.8. If you update to People Planner 3.8 from an older version, this checkbox is disabled. This is to ensure backward compatibility and that the system does not suddenly begin to import calendars.



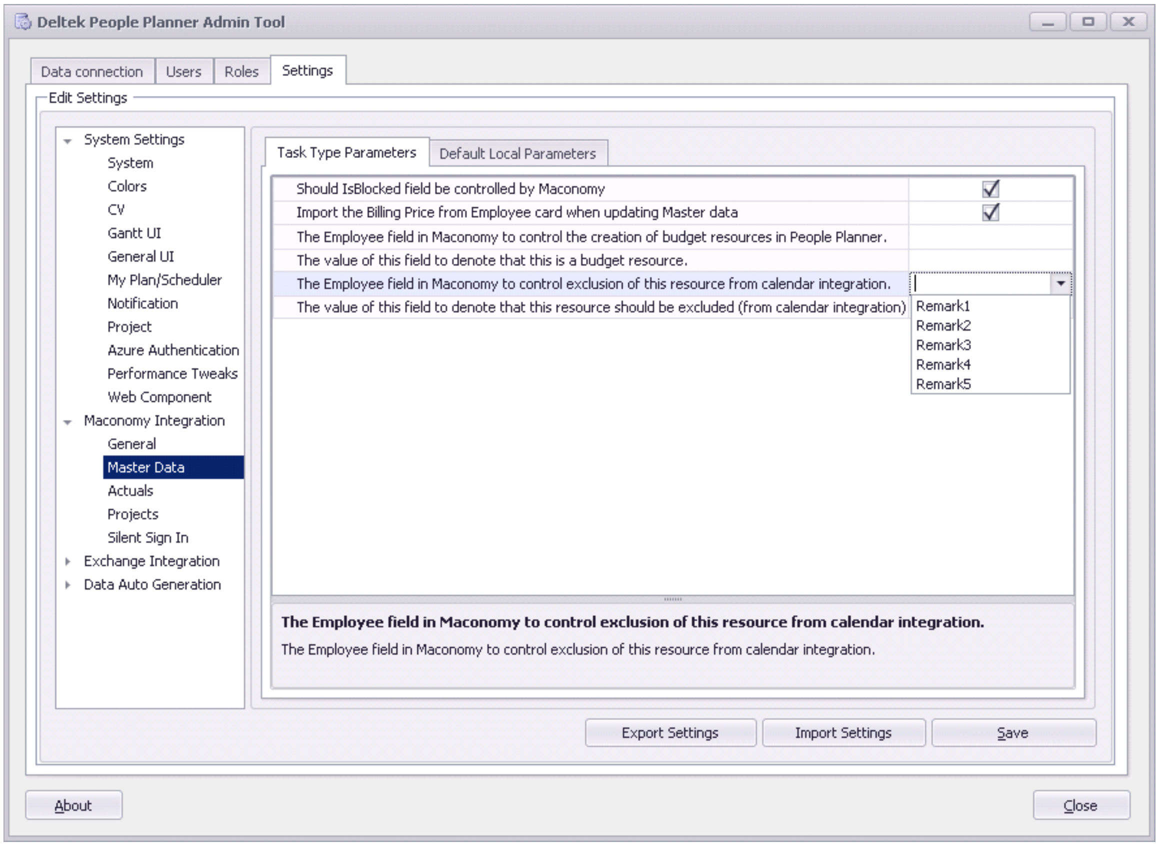
The calendar import uses the Maconomy RESTful web service, and it requires the Employee Card in version 20.0.0 or newer. This means that the URL for the Maconomy RESTful web service must be configured, and that it is Maconomy 2.4 or newer.

Local Parameters

You can exclude employees from the calendar import:

1. Run the **People Planner Admin Tool.**
2. Load the **DataConnection.xml file** and connect to the People Planner database.
3. Click the **Settings** tab.

4. Navigate to **Maconomy Integration » Master Data**.



5. Set the **Employee Field in Maconomy…** field to one of the values **Remark1** through **Remark5**.
6. Enter a short text of your choice in the **Value of this Field…** field.
7. In Maconomy, set the value of the employee's **Remark1** through **Remark5** according to whether the employees' calendars should be imported.

> **Note:** This check is case-sensitive.
>
> For example, if you choose to use the Remark2 field for this purpose, and you set the value of the Remark2 field in Maconomy to "exclude calendar" or "Exclude Calendar," you must use the same casing in People Planner (see step 6).
>
> If you enter "Exclude Calendar" in the People Planner Admin Tool, but use "exclude calendar" in Maconomy, the calendars will be imported, because the check is case-sensitive and sees those two values as non-matching.

Import Projects from Maconomy

You can import projects into People Planner in two ways, depending on which end of the integration it is initiated from:

- **Import from People Planner** — See Import Projects on the People Planner Side.
- **Push from Maconomy** — See Push a Job on the Maconomy Side.

The latter is really just the first in disguise, and therefore almost all of the following holds true for both cases.

The project import uses either the MaconomyWS Web Service or the Maconomy RESTful web service to do the actual import. See Maconomy RESTful vs. MaconomyWS Web Service for a description of this.

For more information about how the individual fields of a job/project or its budget lines are mapped between Maconomy and People Planner, see Project Import Mapping.

Basics of Project Import

The following table describes the Maconomy concepts and how they are imported into People Planner.

Maconomy	People Planner
Job, project, or engagement, depending on the Maconomy solution.	Imported as a project event in People Planner, such as the "green Gantt bar."
Budget, consisting of budget lines.	Budget lines are imported as task events in People Planner, usually as a task or a summary.
Maconomy distinguishes between the job and its budget.	People Planner treats the project event and all of its children as a single entity.
A job can have several budgets, for example, Baseline and Working Budget.	Only one budget can be imported into People Planner. If you want to import a different budget, you first need to delete the existing project in People Planner. See Budget Types.
A budget can be of two kinds, classic budget and matrix budget.	People Planner has always been able to import classic budgets; beginning with release 3.6, People Planner can also import matrix budgets. See Import Classic and Matrix Budgets.
You can assign employees and employee categories on a budget line.	Depending on the People Planner settings, this can be imported as resource and resource category assignments on the event that corresponds to the budget line. See Import Events and Assignments.

Import Budget Lines

You import a job plus one of its budgets into People Planner as a project. Each budget line of the budget is imported as an event in People Planner. The Line Type of the budget line determines which Kind of event it becomes:

Line Type of Budget Line in Maconomy	Kind of Event in People Planner
The project	Is imported as an event of Kind = Project
Budget line with line type “Time”	Is imported as an event of Kind = Task
Budget line with line type “Sum/Text”	Is imported as an event of Kind = Summary
Budget line with line type “Amount” or “Outlay”	Is imported as an event of Kind = Amount (if you have enabled Amount lines import)

Note: These rules might result in an imported project that would not be possible to create directly in People Planner, such as a project that contains a summary event without any child task events.

Customer and Company

People Planner has a setting, **Are Customer and Company Mandatory Fields on a Project**: When this setting is selected, you receive an error message if you attempt to create a project and you have not filled in each of the customer and company fields. This setting is selected by default.

The setting applies both when you create a project directly in People Planner, and when you import projects, for example, from Maconomy.

You normally import customers and companies from Maconomy through the Master Data import. However, sometimes a customer has been created in the Maconomy system after the Master Data was last imported into People Planner, and as a result, that customer does not exist in the People Planner system yet.

If you import a project from Maconomy, and the company or customer does not already exist in the People Planner database, they are imported automatically.

Note: Before People Planner 3.8.6, the import failed with an error message. To fix this problem, you were required to run the Master Data import manually to get the update list of customers and companies into People Planner.

Import Classic and Matrix Budgets

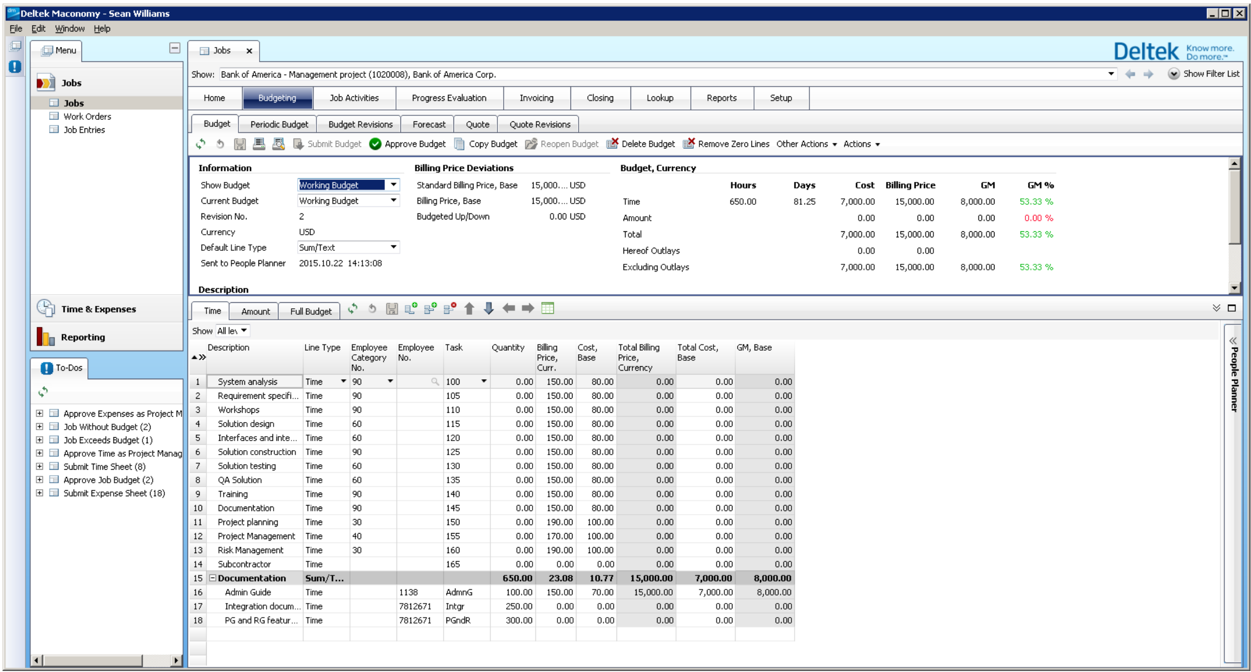
Maconomy has two kinds of budgets, classic budgets and matrix budgets.

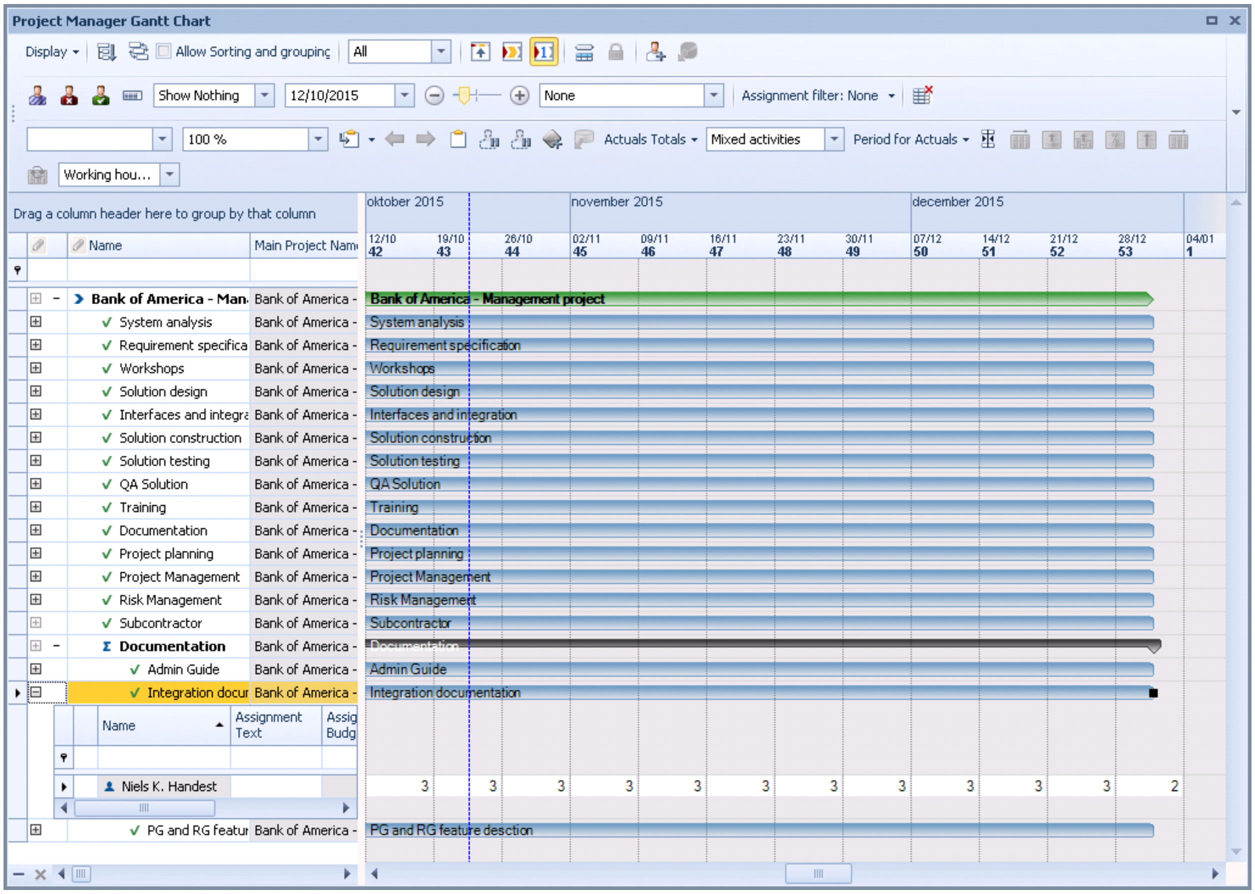
The main difference between these is how many employees can be assigned on a budget line. In a classic budget, only one employee and only one employee category can be assigned. In a matrix budget, you can create assignments that total a maximum of 50 items. That is, you can create a list of employees, employee categories, or combinations thereof that can be a maximum of 50 items long. You can see an example of this in the four columns that are added in the figure in Job with a Matrix Budget.

It has always been possible to import classic budgets from Maconomy. Beginning with People Planner 3.6 and forward it is also possible to import jobs with matrix budgets.

Job with a Classic Budget

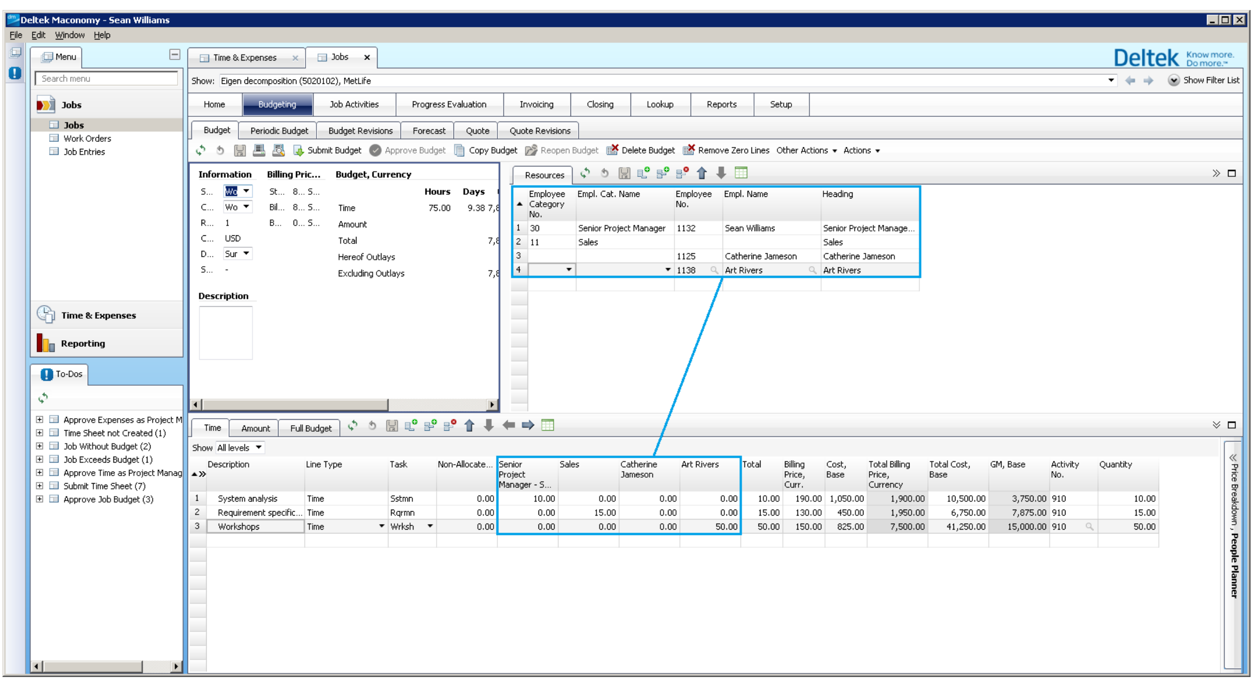
The following example shows a job and its working budget—in this case a classic budget—and how they are imported into People Planner. The second example also shows how assignments are imported if People Planner is configured to import them.

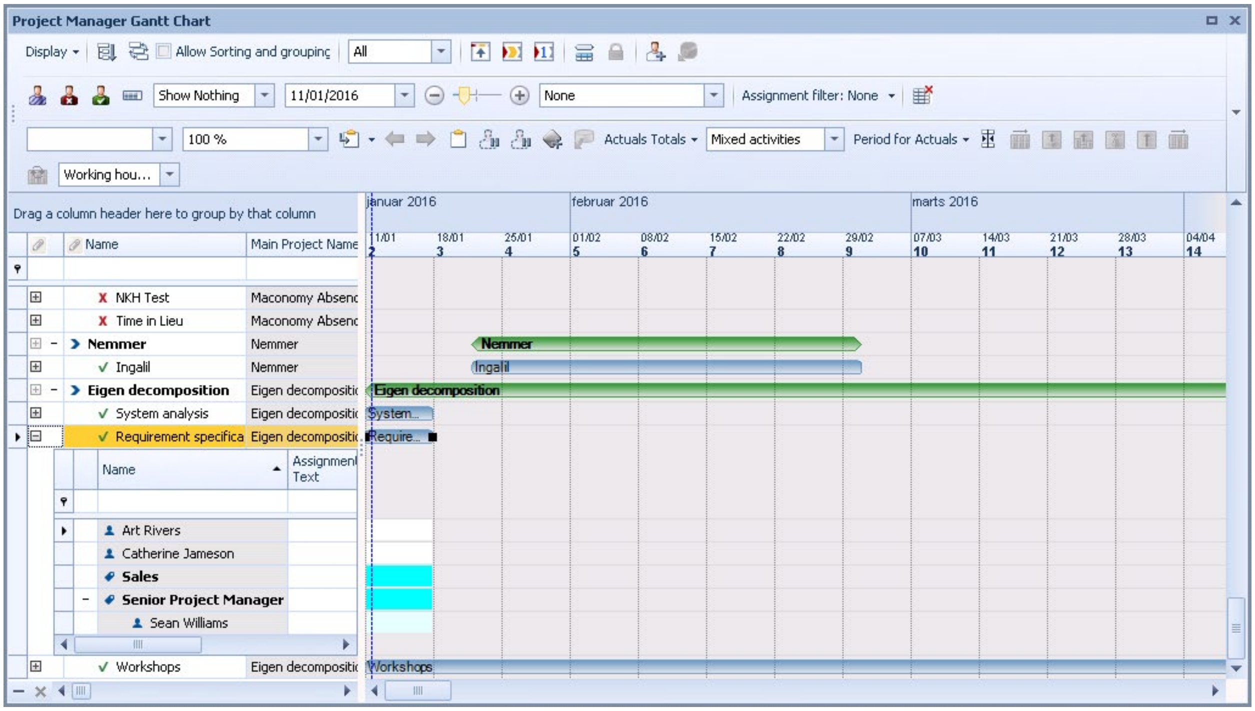




Job with a Matrix Budget

The following example shows a job and its working budget—in this case a matrix budget—and how they are imported into People Planner. The second example also shows how assignments are imported if People Planner is configured to import them.





The matrix budget has four assignments in Maconomy.

1. Senior Project Manager + Sean Williams
2. Sales
3. Catherine Jameson
4. Art Rivers

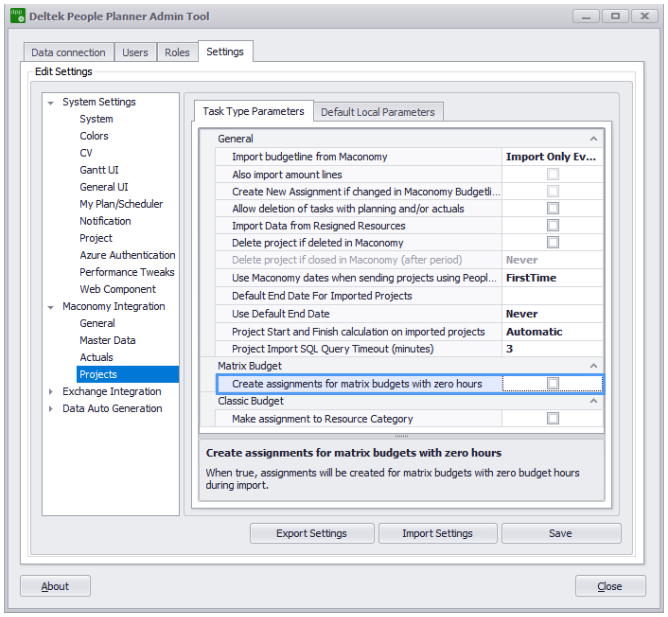
In People Planner, this becomes four assignments and one sub-assignment:

1. Art Rivers
2. Catherine Jameson
3. Sales
4. Senior Project Manager
    a. Sean Williams

The ability to assign resource categories—Sales and Senior Project Manager—to a task was introduced in People Planner 3.6. It was mainly added to support the import of matrix budgets, but it is also useful in its own right.

In People Planner 3.6, all assignments are imported, regardless of whether or not they have a budget in Maconomy. In the preceding example, Art Rivers does not have any hours on the Requirements Specification budget line.

People Planner 3.6.1 introduced the setting **Create assignments for matrix budget with zero hours**. This is set in the People Planner Admin Tool under Maconomy Integration » Projects » Matrix Budget.



Option	Description
Selected	Assignments are created in People Planner for all of the combinations of employees and employee categories and budget lines, including the cases where no hours have been allocated on the budget. **Note:** If the system was updated from People Planner 3.6, this setting is selected for backward compatibility.
Not Selected	Assignments are only created in People Planner when hours have been allocated for an employee or employee category on a budget line. This is the default for a new system.

Import Classic Budget – Employee Categories

Beginning with People Planner 3.6, you can assign resource categories on events. This has possible consequences for how a classic budget is imported.

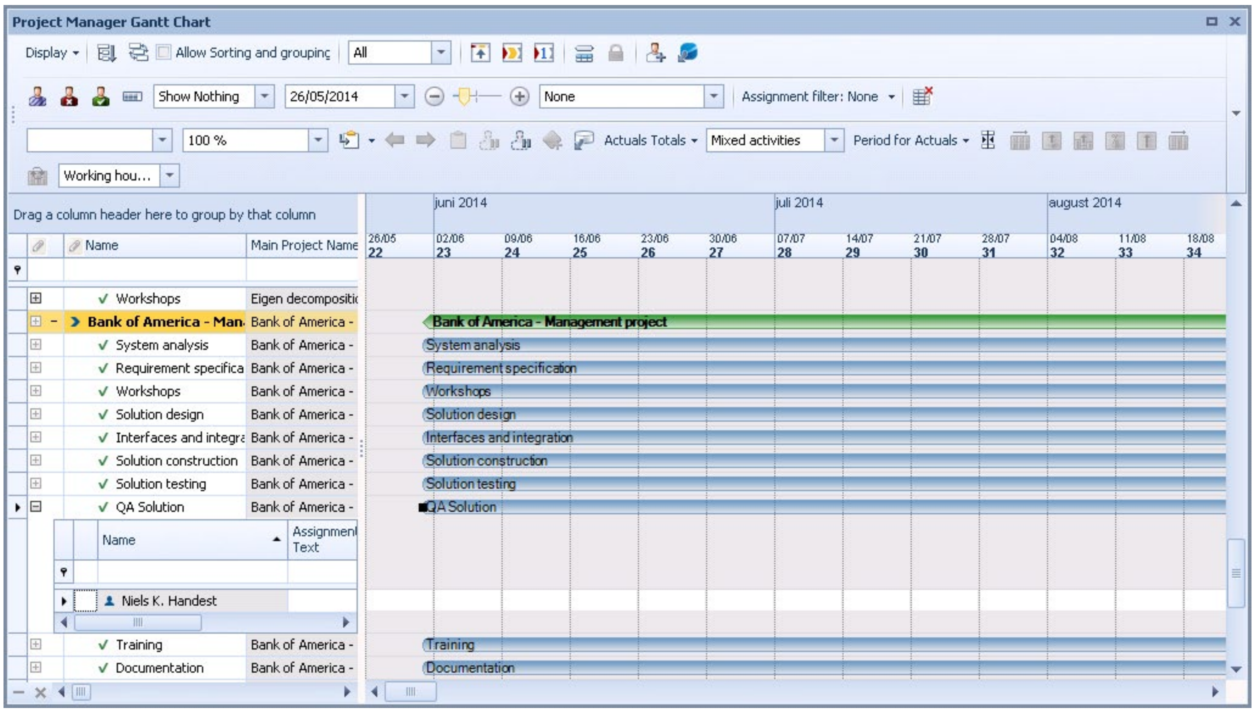
In Maconomy, you have always been able to have both an employee and an employee category on a budget line.

Time | Amount | Full Budget

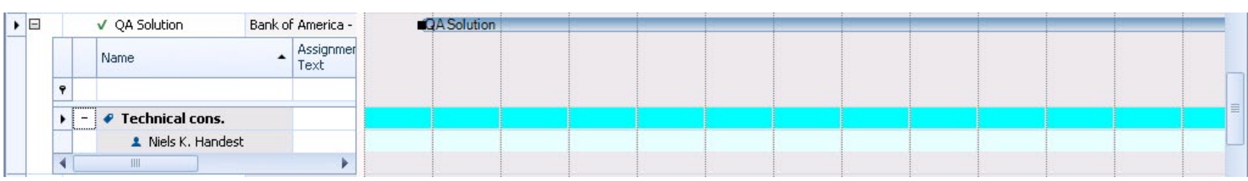
Show

	Description	Line Type	Employee Category No.	Employee No.	Activity No.	Task	Quantity	Billing Price, Curr.	Cost, Base	Total Billing Price, Currency	Total Cost, Base	GM, Base
5	Interfaces and integ...	Time	60		100	120	0.00	150.00	80.00	0.00	0.00	0.00
6	Solution construction	Time	90		100	125	0.00	150.00	80.00	0.00	0.00	0.00
7	Solution testing	Time	60		100	130	0.00	150.00	80.00	0.00	0.00	0.00
8	QA Solution	Time	60	78126...	100	135	1000.00	150.00	80.00	150,000.00	80,000.00	70,000.00
9	Training	Time	90		100	140	0.00	150.00	80.00	0.00	0.00	0.00
10	Documentation	Time	90		100	145	0.00	150.00	80.00	0.00	0.00	0.00
11	Project planning	Time	30		100	150	0.00	190.00	100.00	0.00	0.00	0.00
12	Project Management	Time	40		100	155	0.00	170.00	100.00	0.00	0.00	0.00
13	Risk Management	Time	30		100	160	0.00	190.00	100.00	0.00	0.00	0.00
14	Subcontractor	Time			100	165	0.00	0.00	0.00	0.00	0.00	0.00
15	**Documentation**	**Sum/Text**					**650.00**	**23.08**	**10.77**	**15,000.00**	**7,000.00**	**8,000.00**
16	Admin Guide	Time		1138	910	AdmnG	100.00	150.00	70.00	15,000.00	7,000.00	8,000.00
17	Integration docum...	Time		7812671	910	Intgr	250.00	0.00	0.00	0.00	0.00	0.00

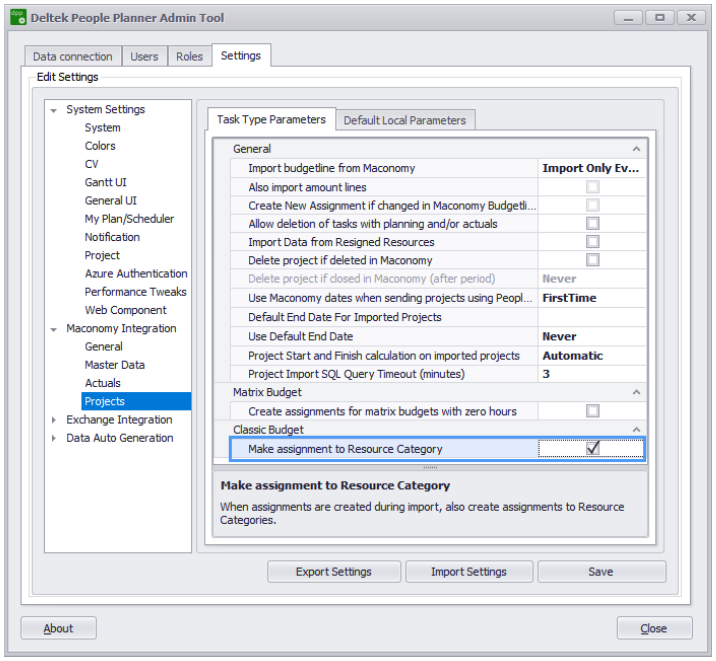
Before People Planner 3.6, this was always imported as a single resource assignment, and any resource category was simply ignored.



Beginning with People Planner 3.6, another option is available, that is, to have the resource category imported.



To ensure backward compatibility, and to give you a choice between the two methods, the **Make assignment to Resource Category** setting was introduced in People Planner 3.6.



If this setting is not selected, classic budgets are imported the old way.

> **Note:** This setting only affects classic budgets. Matrix budgets are always imported with resource categories.

Resource Categories

Employee Categories in Maconomy are called Resource Categories in People Planner.

Importing matrix budgets also imports assignments on employee categories. Importing classic budgets may or may not, depending on the **Make assignment to Resource Category** setting. You can also assign resource categories on a task directly in People Planner.

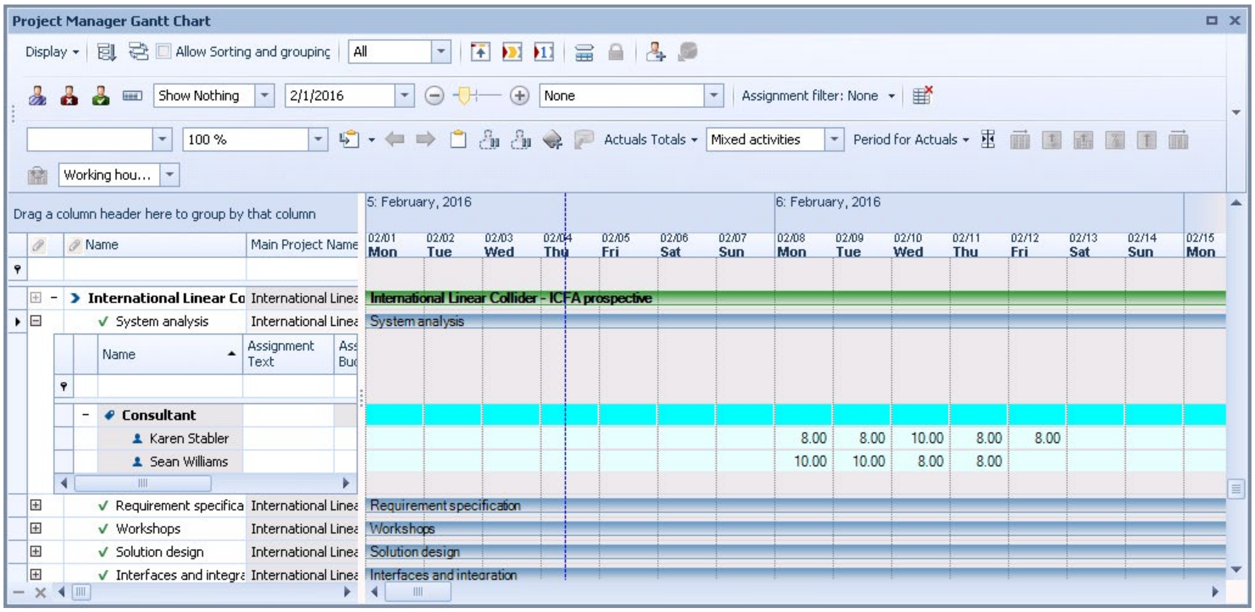
A resource category is not a dummy resource, such as a People Planners Draft resource:

- You cannot book hours directly on the resource category.
- You can later replace it with just one resource, as long as the category assignment does not contain any sub-assignment.

Instead, the intent is that you assign resources on the resource category. These are called sub-assignments. You can then book on these sub-assigned resources instead.

For example:

1. You have assigned the resource category of Consultant on a task.
2. Later you decide that you will use the two consultants Sean Williams and Karen Stabler on the task, and you then sub-assign these two resources on the Consultant resource category.
3. You can then start planning on the resources.



Note: In Maconomy, there are restrictions on which employee categories and employees can be combined. In People Planner, there are no such restrictions.

Import Events and Assignments

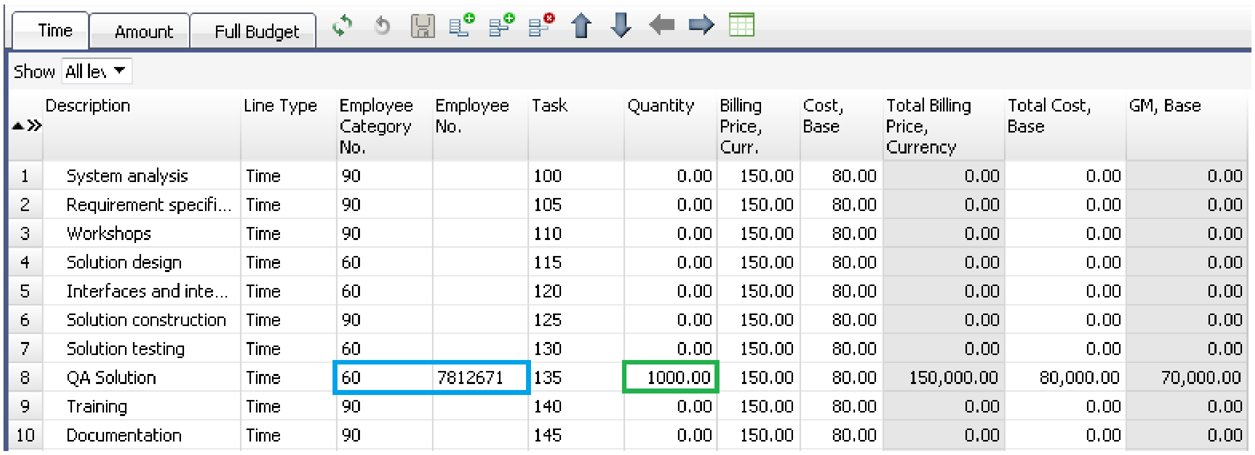
The setting **Import budgetline from Maconomy** determines whether and how assignments are imported. It has two options.

Option	Description
Import Only Events	▪ Each budget line in Maconomy is imported as an event into People Planner. ▪ Even though the budget line has been assigned one or more employees and employee categories, these are not imported into People Planner.
Import Events and Assignments	▪ Each budget line in Maconomy is imported as an event into People Planner. ▪ If the budget line has been assigned one or more employees and employee categories, these are imported as assignments on the tasks in People Planner.

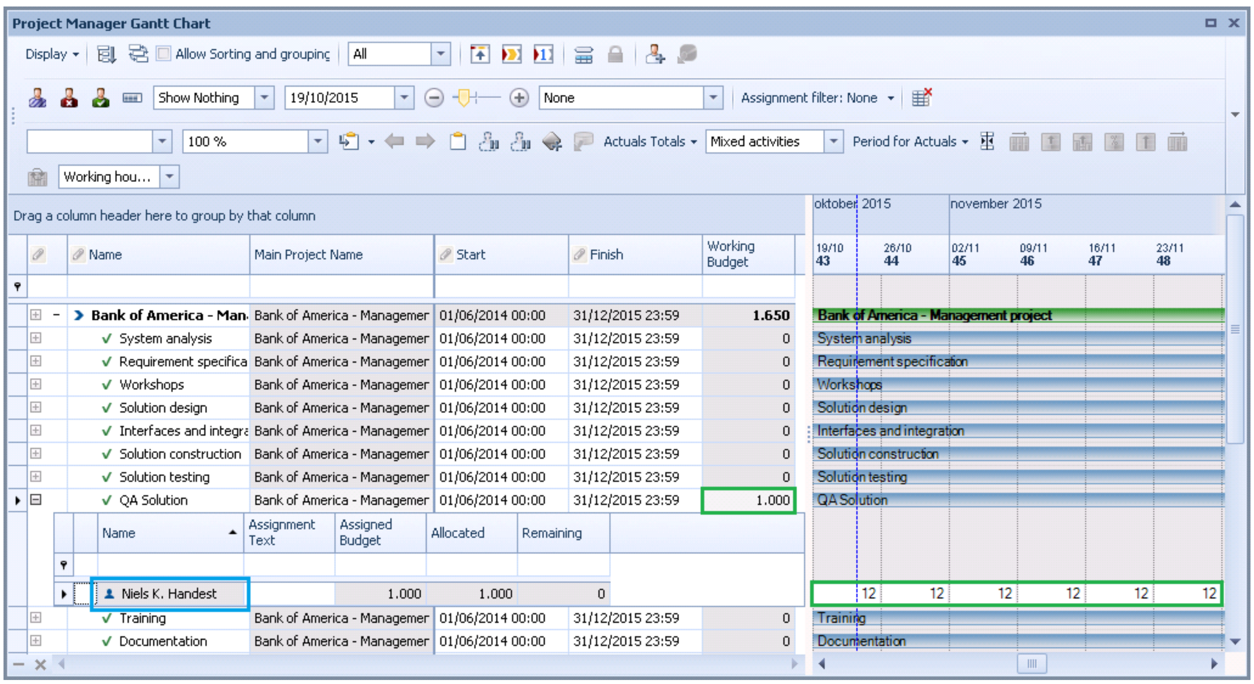
If you use the People Planner Web Components, it is recommended that you set it to Import Events and Assignments. See People Planner Assistant.

How Budgeted Hours are Imported

The next two examples illustrate how the quantity is converted into bookings.



	Description	Line Type	Employee Category No.	Employee No.	Task	Quantity	Billing Price, Curr.	Cost, Base	Total Billing Price, Currency	Total Cost, Base	GM, Base
1	System analysis	Time	90		100	0.00	150.00	80.00	0.00	0.00	0.00
2	Requirement specifi...	Time	90		105	0.00	150.00	80.00	0.00	0.00	0.00
3	Workshops	Time	90		110	0.00	150.00	80.00	0.00	0.00	0.00
4	Solution design	Time	60		115	0.00	150.00	80.00	0.00	0.00	0.00
5	Interfaces and inte...	Time	60		120	0.00	150.00	80.00	0.00	0.00	0.00
6	Solution construction	Time	90		125	0.00	150.00	80.00	0.00	0.00	0.00
7	Solution testing	Time	60		130	0.00	150.00	80.00	0.00	0.00	0.00
8	QA Solution	Time	60	7812671	135	1000.00	150.00	80.00	150,000.00	80,000.00	70,000.00
9	Training	Time	90		140	0.00	150.00	80.00	0.00	0.00	0.00
10	Documentation	Time	90		145	0.00	150.00	80.00	0.00	0.00	0.00



Name	Main Project Name	Start	Finish	Working Budget
Bank of America - Man...	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	1.650
System analysis	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Requirement specifica	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Workshops	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Solution design	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Interfaces and integra	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Solution construction	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Solution testing	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
QA Solution	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	1.000
Training	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0
Documentation	Bank of America - Managemer	01/06/2014 00:00	31/12/2015 23:59	0

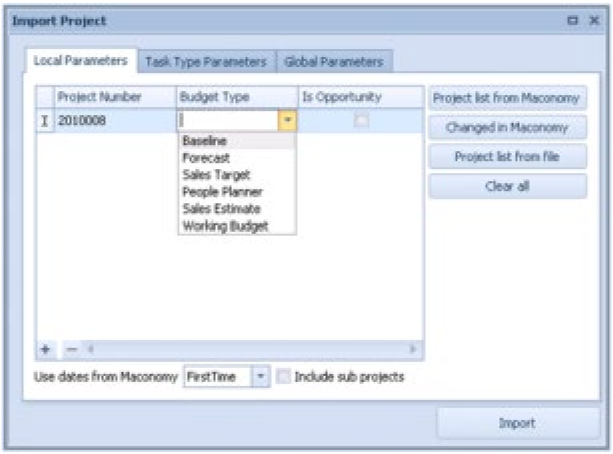
Name	Assignment Text	Assigned Budget	Allocated	Remaining	19/10 43	26/10 44	02/11 45	09/11 46	16/11 47	23/11 48
Niels K. Handest		1.000	1.000	0	12	12	12	12	12	12

In this example, the 1,000 hours are spread evenly over the duration of the project.

Budget Types

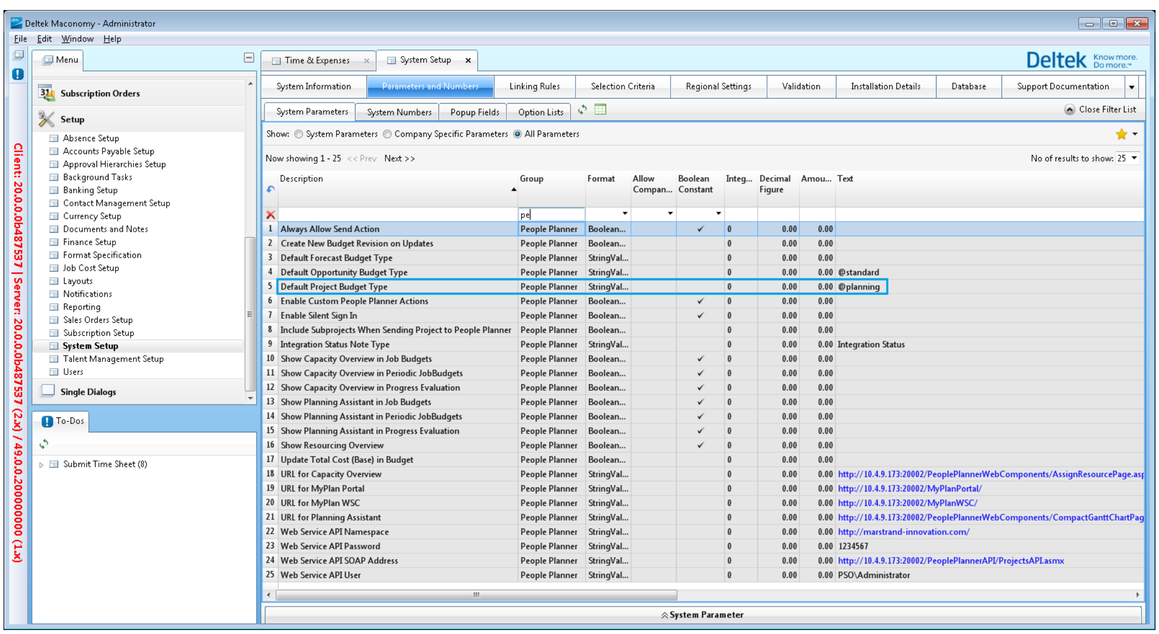
A job can have several budgets in Maconomy, such as Baseline, Working Budget, and so on, but People Planner can only import one of these. So which one is it?

If you do a manual import directly from People Planner, you can choose which budget to import, as the following example (using the Import Project view) shows.



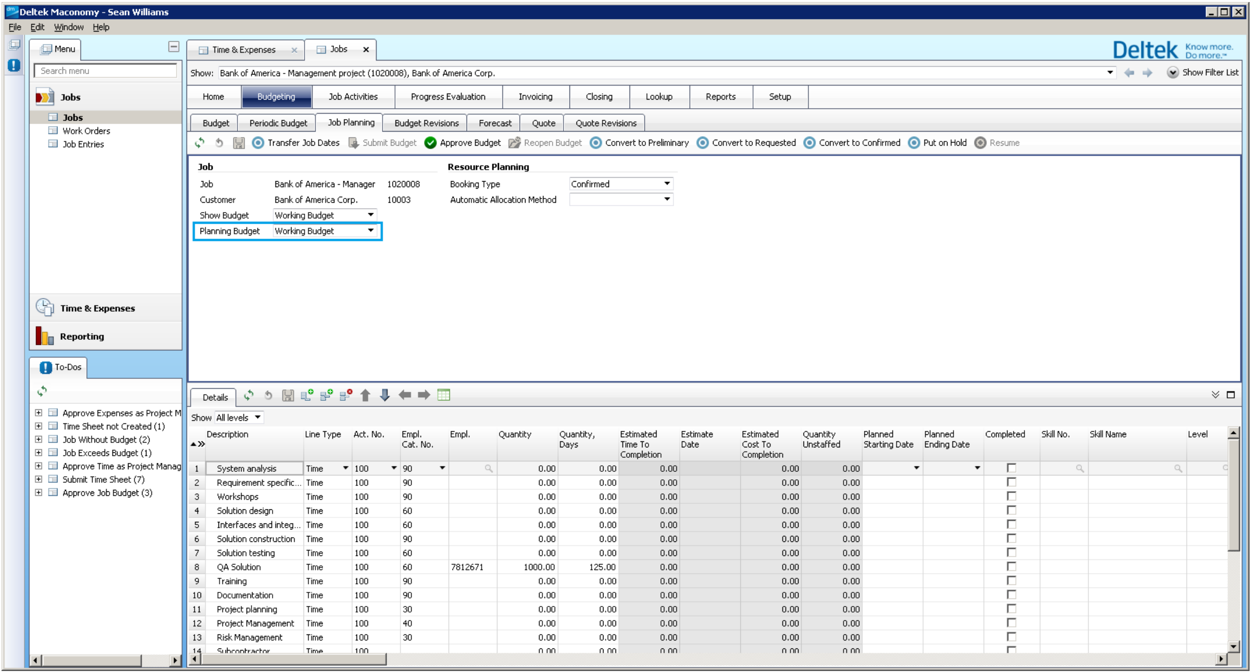
When a budget has been imported into People Planner, you cannot change it to another; you will get the same budget the next time that you update the project. The only way to get another budget is to delete the project in People Planner—losing any previous planning—and then import the project with another budget.

When you leave it to Maconomy to select the budget type—such as when you do not use the Import Project view—the **Default Project Budget Type** setting controls this.



You can set this setting to point to either the current planning budget—that is, to "@planning"—or to a specific budget, such as "Working Budget."

The planning budget is one of the available budgets. Usually, it is the original template job that determines which one it will be. You can select a different one under the Job Planning tab.



In some installations, the Job Planning tab is not available. To configure it to be visible, you must set the **UseJobPlanning** setting to true. You do this in the configuration file for the Deltek Coupling Service, couplingconfiguration.mcsl.xml, as the following example illustrates.

```xml
<Binding namespace="solutionconfiguration">
  <Fields>
    <Field name="UseJobPlanning" value="true" />
    <Field name="ShowJobCardInJobHome" value="false" />
    <Field name="UseJobPhases" value="false" />
    <Field name="UseJobEvents" value="false" />
    <Field name="UseJobQuotes" value="true" />
    <Field name="UseJobForecasting" value="true" />
    <Field name="UsePeriodicJobBudgets" value="true" />
    <Field name="UseJobProgress" value="true" />
    <Field name="ShowJobEmployeesInJobHome" value="false" />
            <Field name="ShowJobNumberWithJobName" value="false" />
    <Field name="UseCustomerTaxReturns" value="false" />
  </Fields>
</Binding>
```

The WSC comes with a set of Maconomy-configurations. These can be overruled by a solution (such as PSO or MCS), and this can again be overruled by a customization. It is important to edit the correct configuration, or it can be overruled by one of the others.

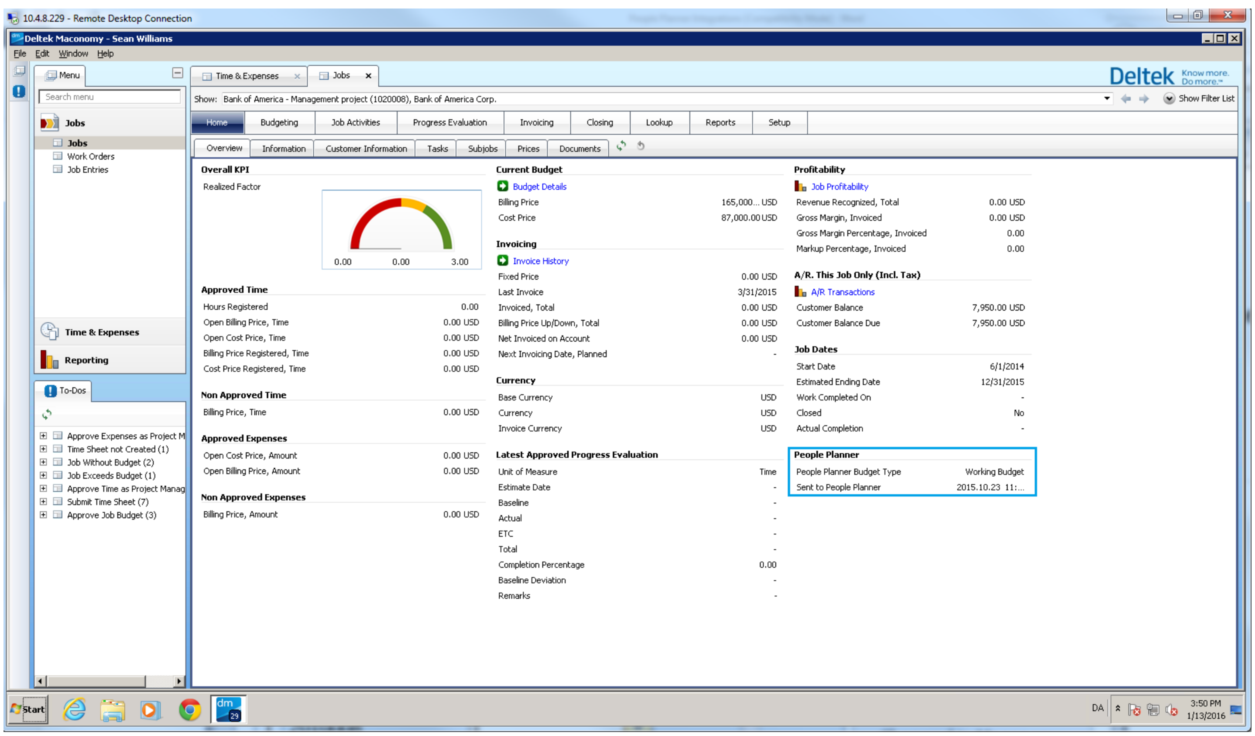
For the file, it is placed in one of the following paths.

Path	Layer
`C:\maconomy\<application name>\MaconomyDir\Definitions`	Maconomy configuration
`C:\maconomy\<application name>\CustomizationDir\Solution\Definitions`	Solution
`C:\maconomy\<application name>\CustomizationDir\Custom\Definitions`	Customization

Any changes should preferably be done as a customization.

1. Take the version of the file that is the active one, that is, it overrules the others.
2. Copy it to the Custom directory. You should create this directory if it does not already exist.
3. Edit the file.
4. Restart the coupling service.

Maconomy keeps track of which budget was sent to People Planner.



Actuals

For a comprehensive discussion of Import of Actuals, see Import Actuals from Maconomy. This section is a short description of how actuals relate to the budget.

Maconomy Time Registrations (Import Actuals in People Planner) are mapped to a specific budget in Maconomy before they are transferred to People Planner. The budget type used in this mapping is the same as specified for the project import described previously. This ensures that when actuals are imported they appear on the corresponding assignment in People Planner.

However, if a project is manually imported from People Planner using a different budget type (than the one specified in Maconomy), *the imported actuals are shown on the project level in People Planner (and not on the individual assignments)*. This is because there is a mismatch in the budget types that are used for importing the project and mapping the time registrations.

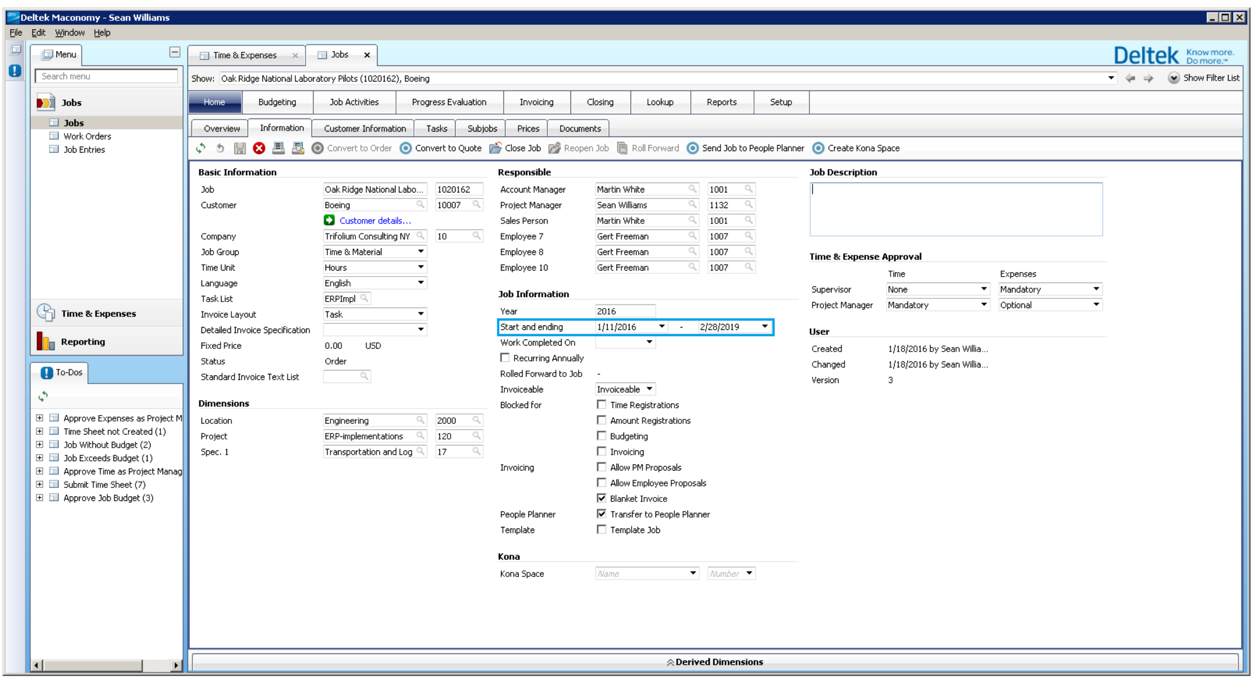
Start and Finish Times

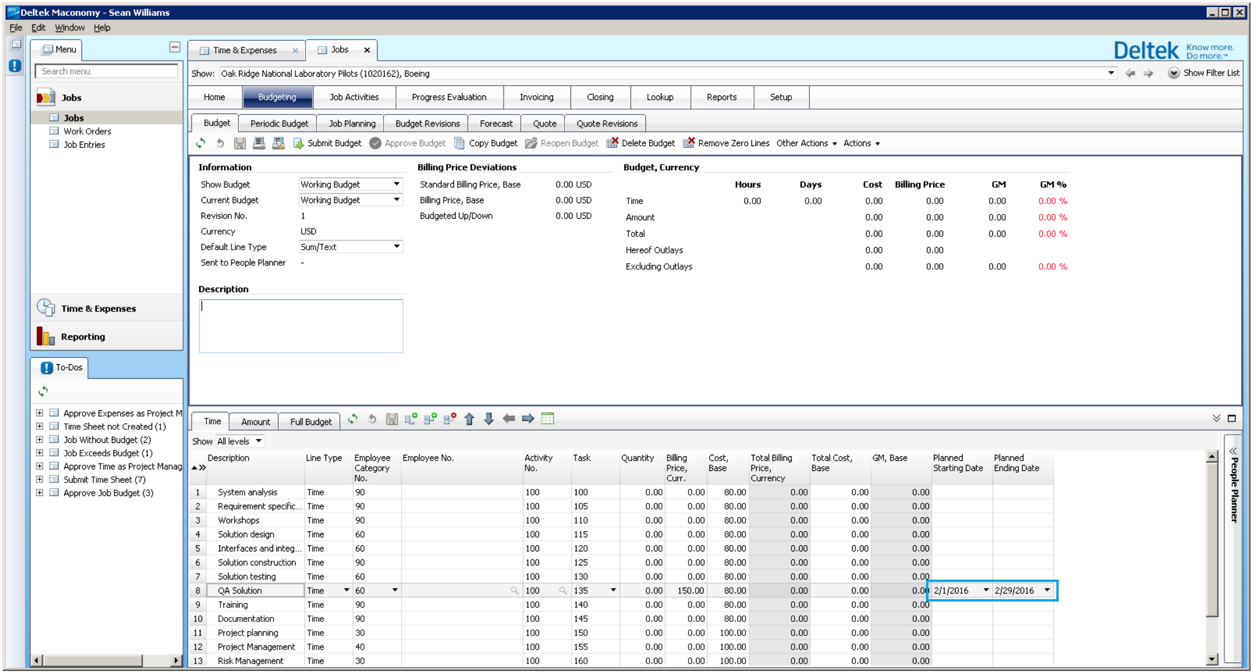
There are two basic strategies for handling the start and finish times on projects during project imports:

- Let Maconomy handle the start and finish times, and simply import these into People Planner.
- Disregard any times from Maconomy, and let People Planner handle the start and finish times.

Depending on how you want to work with Maconomy, you might want to control the times in Maconomy, or you might leave them blank and instead edit the times in People Planner.

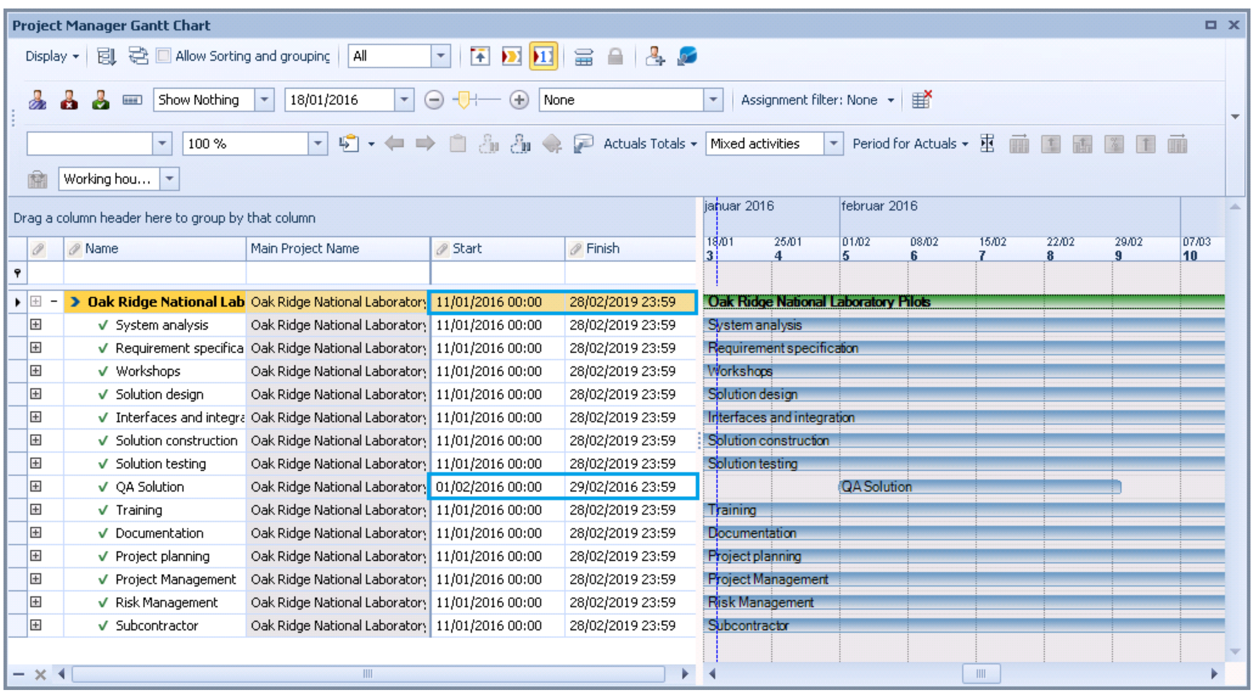
The following two figures show how to set the start and finish times on a job, and directly on a budget line in Maconomy.



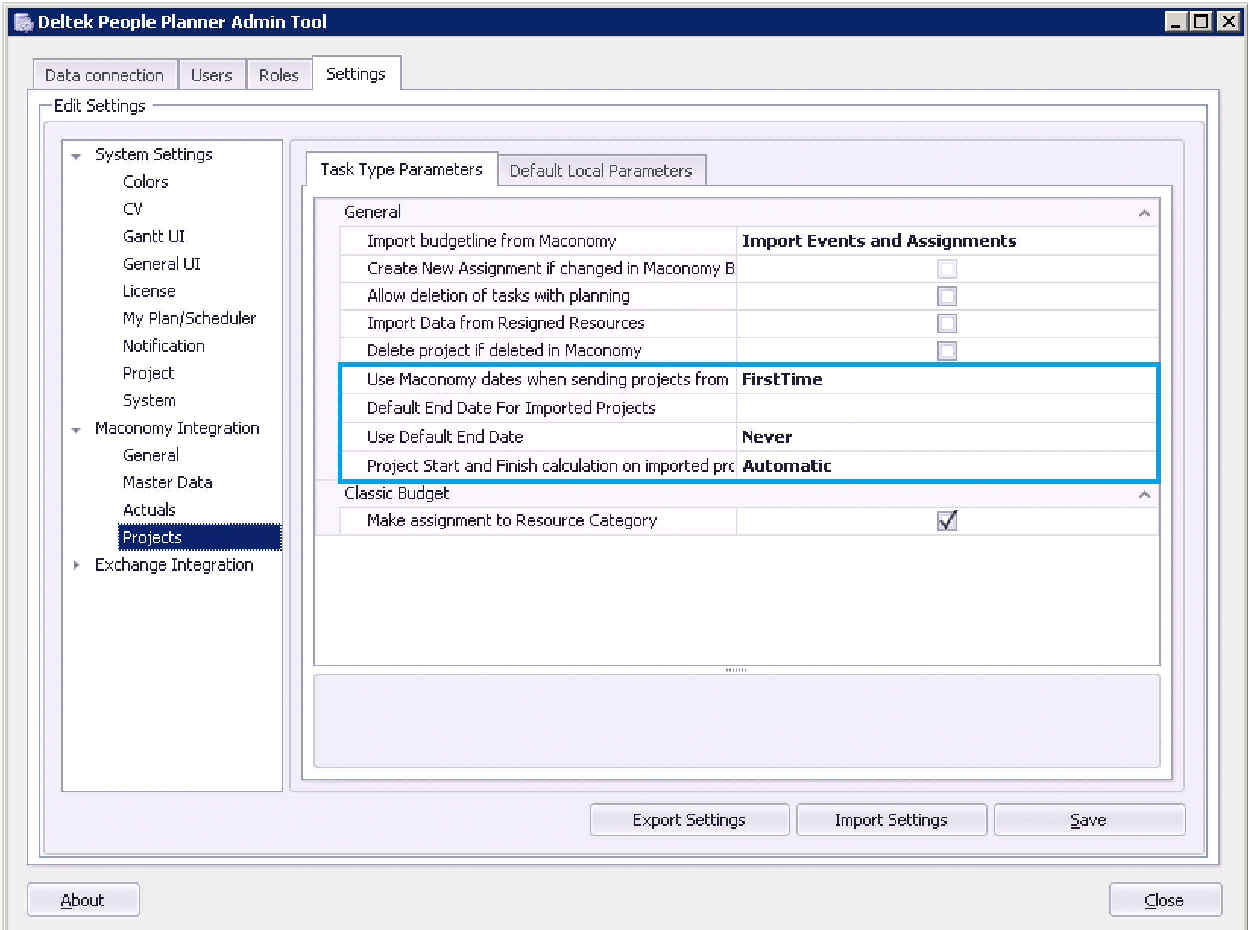


Note: Unlike with People Planner, it is not mandatory to provide these values in Maconomy.

When imported into People Planner, this project would look like the following figure.



The following settings in the People Planner Admin Tool control how the Maconomy start and finish times are handled when importing a job into People Planner.



The first setting, **Use Maconomy dates …**, controls when the import looks for the dates in Maconomy. The following table describes this setting's options.

Option	Description
Never	Dates are handled in People Planner alone. Any dates that come from Maconomy are ignored. For a description of how People Planner determines the start and finish times, see the description that follows this table.
FirstTime	▪ When a project is first imported from Maconomy, any start and finish times from Maconomy are used to set the times in People Planner. ▪ When a project is later updated, People Planner disregards any discrepancies between the times in Maconomy and those in People Planner. 1. This allows you to edit the times in People Planner without worrying that they will later be overwritten with the times from Maconomy. 2. It also means that even if the times are changed in Maconomy, they will not be updated in People Planner.

Option	Description
	Note: If the project is deleted in People Planner, the next import will treat it as if the project is being imported for the first time.
Always	When a project is imported in People Planner, whether it is for the first time or it is an update, People Planner uses the start and finish times from Maconomy to set the times for the project in People Planner.

Note: If People Planner expects to get the start and finish times from Maconomy, and it does not get them, it falls back to using the default start and finish times.

People Planner has its own system for suggesting start or finish times. The easiest way to illustrate how this works is to look at project creation. When a project is created in People Planner, a default start or finish time is suggested:

- The default start time is always "Monday of the current week." If a project is created on Friday 01/15 2015 at 03:35 PM, the default start time is set to Monday 01/11 2015 at 00:00 AM.
- The default finish time is "Sunday of the current week," and in this example it would be Sunday 01/17 2015 at 23:59 PM.

Note: People Planner follows the European standard, where the week starts on Monday.

The project import follows the same system: When People Planner does not have the start or finish time for an imported project—for example, if the times were not entered in Maconomy or People Planner is configured to disregard times from Maconomy—it falls back to its own system of defining the default times.

However, whereas the default start time is always dynamically calculated—that is, it depends on the current week—the default finish time can be either dynamically calculated or it can be a static preset value.

- **Dynamic default finish-time** — The finish time is calculated to be the end of the current week, that is, the week when the project import happens to run.
- **Static default finish-time** — The finish time is set to a configurable preset value, such as 01/01 – 3000.

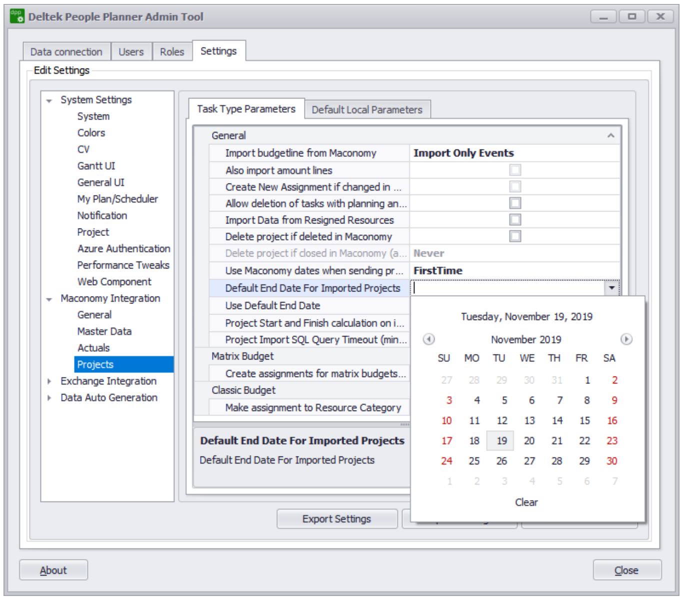
Note: When using a static default finish date, this is usually set to a distant future date. This is because the option is intended for the case where projects should run "forever."

The setting **Use Default End Date** determines when to apply the dynamic default finish date and when to apply the static default finish date instead.

Option	Description
Never	Use the People Planner dynamic default date.
When There Is No Maconomy Date	Use the People Planner static default date where the finish date has not been set in Maconomy.

Option	Description
Always	Use the People Planner static default date, even if the finish date has been set in Maconomy, and even if the date from Maconomy is not used.

The **Default End Date For Imported Projects** setting controls the value of the static default finish time.



The following table summarizes these rules.

Use Dates from Maconomy	Use Default End Dates	First Import?	Result
Never	Never	Yes	Start = Parent new? Monday : Parent.Start Finish = Parent new? Sunday : Parent.Finish
	When no Dates in Maconomy		Start = Parent new? Monday : Parent.Start Finish = Parent new? Default : Parent.Finish
	Always		Start = Parent new? Monday : Parent.Start Finish = Default
	–	No	Start = Do not change Finish = Do not change
First Time	Never	Yes	Start = Mac.Start? Mac.Start : Monday Finish = Mac.Finish? Mac.Finish : Sunday
	When no dates in Maconomy		Start = Mac.Start? Mac.Start : Monday Finish = Mac.Finish? Mac.Finish : Default

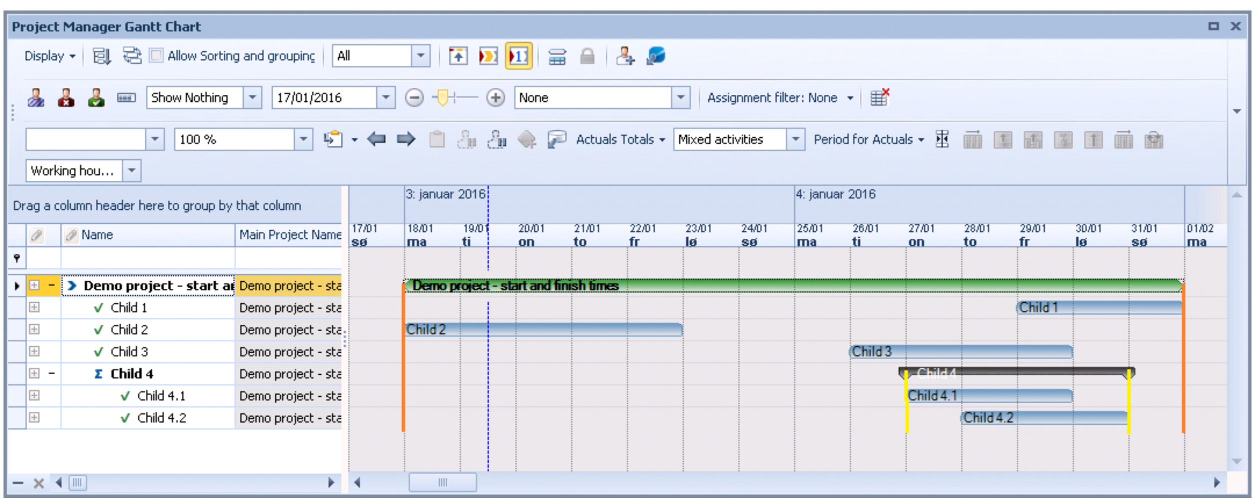
Use Dates from Maconomy	Use Default End Dates	First Import?	Result
	Always		Start = Mac.Start? Mac.Start : Monday Finish = Default
	–	No	Start = Do not change Finish = Do not change
Always	Never	Yes / No	Start = Mac.Start? Mac.Start : Monday Finish = Mac.Finish? Mac.Finish : Sunday
	When no dates in Maconomy		Start = Mac.Start? Mac.Start : Monday Finish = Mac.Finish? Mac.Finish : Default
	Always		Start = Mac.Start? Mac.Start : Monday Finish = Default

Explanation:

- The shortened form “Question? Value1 : Value2” should be read as follows: “If the answer to the Question is yes, then use Value1, else use Value2.”
- “Monday” and “Sunday” mean that the start and finish times are created dynamically.
- “Default” means that the finish time is chosen to be the static default finish time.
- “Parent new” refers to whether the parent was created as part of the import. For a job, the parent is the main project (if any). For a budget line the parent is either the job or another budget line.
- “Mac.Start” and “Mac.Finish” refer to whether the start or finish time was set in Maconomy.

In People Planner, there are usually strict rules for how the start and finish times of a parent event relate to the start and finish times of its children:

- The start time of an event is equal to the earliest start time of any of its children.
- The finish time of an event is equal to the latest finish time of any of its children.



In Maconomy, there are no such rules, and this can cause a conflict during project import. The setting **Project Start and Finish calculation on imported projects** determines how to resolve this.

Option	Description
None	People Planner uses the start and finish times from the import, even if these break People Planner's own rules for start and finish times.
Automatic	People Planner starts with the start and finish times from the import. If these are in violation of People Planner's own rules, they are adjusted to fit. This means that the parents are resized to fit, based on their children's start and finish times.

Grouping

A budget in Maconomy can end up having many budget lines. It is not necessarily the same detail level that you would want to plan on in People Planner.

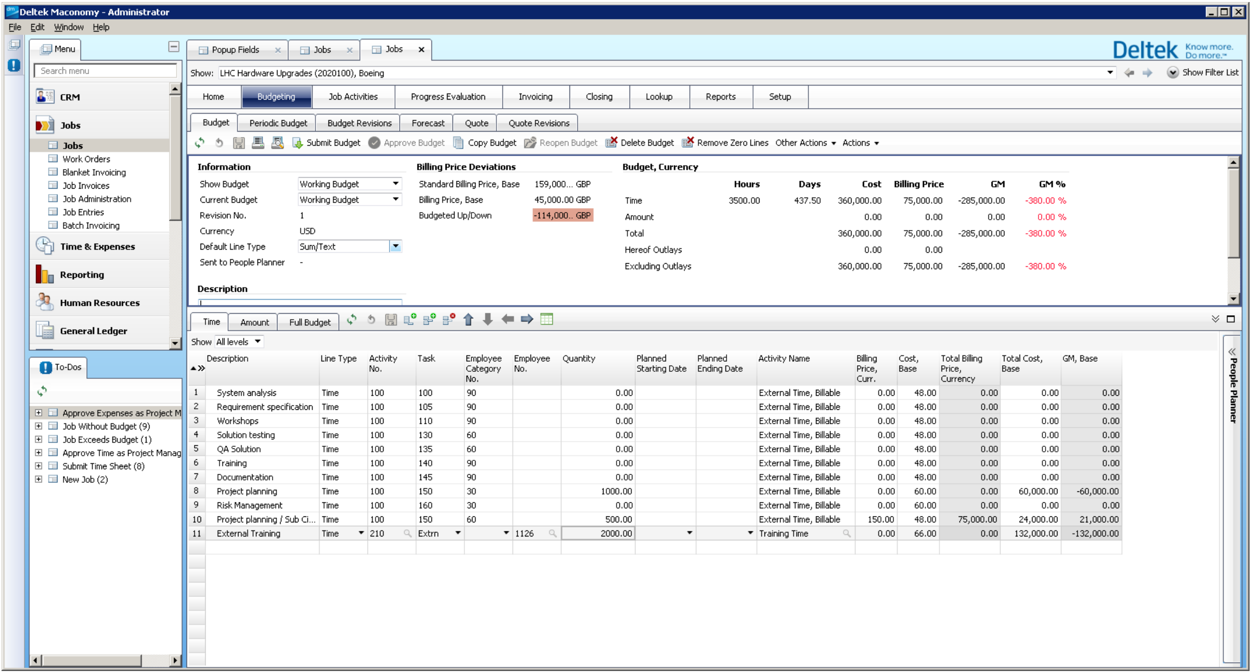
Grouping gives you the option to organize budget lines when they are imported into People Planner. Grouping can group budget lines depending on the Activity and Task. You can use the options that the following table describes.

Grouping	Description
No Grouping	Budget lines are not grouped. Each budget line is imported into People Planner as an individual task.
Grouping with Activity and Task	Lowest level of grouping. Budget lines with the same Activity and the same Task are grouped together as a single task when imported into People Planner.
Group with Activity	Highest level of grouping. Budget lines with the same Activity are grouped together as a single task when imported into People Planner.

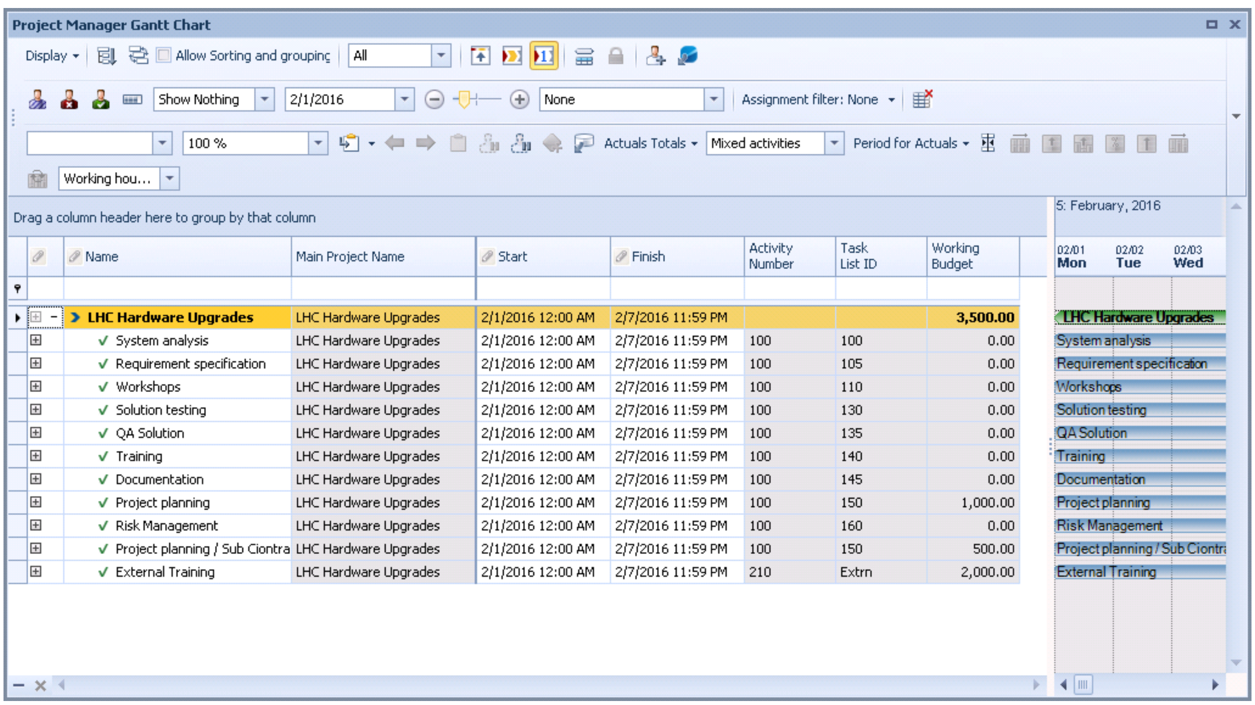
Examples of Grouping

In the following example, the job contains 11 budget lines:

- The first 10 budget lines have the same Activity No. and the eleventh has a different one.
- Two budget lines, numbers 8 and 10, have the same Task in addition to the same Activity.

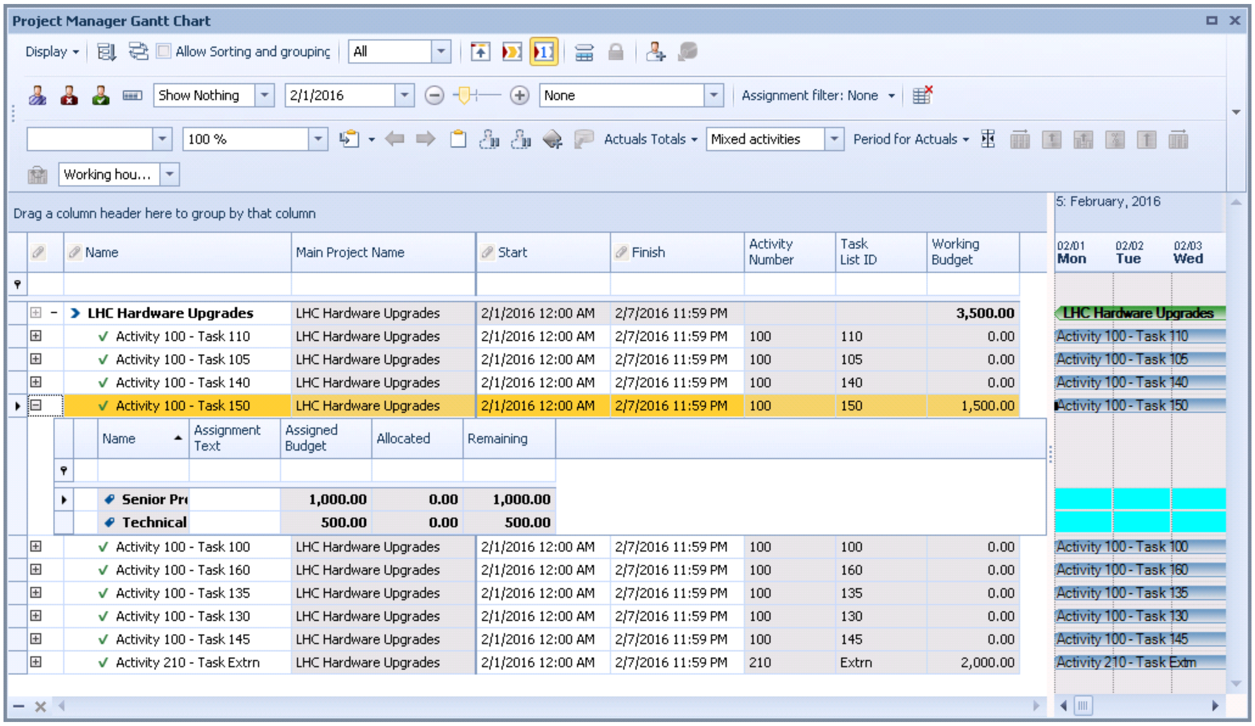


The following is an example of No Grouping. No budget lines are grouped together.



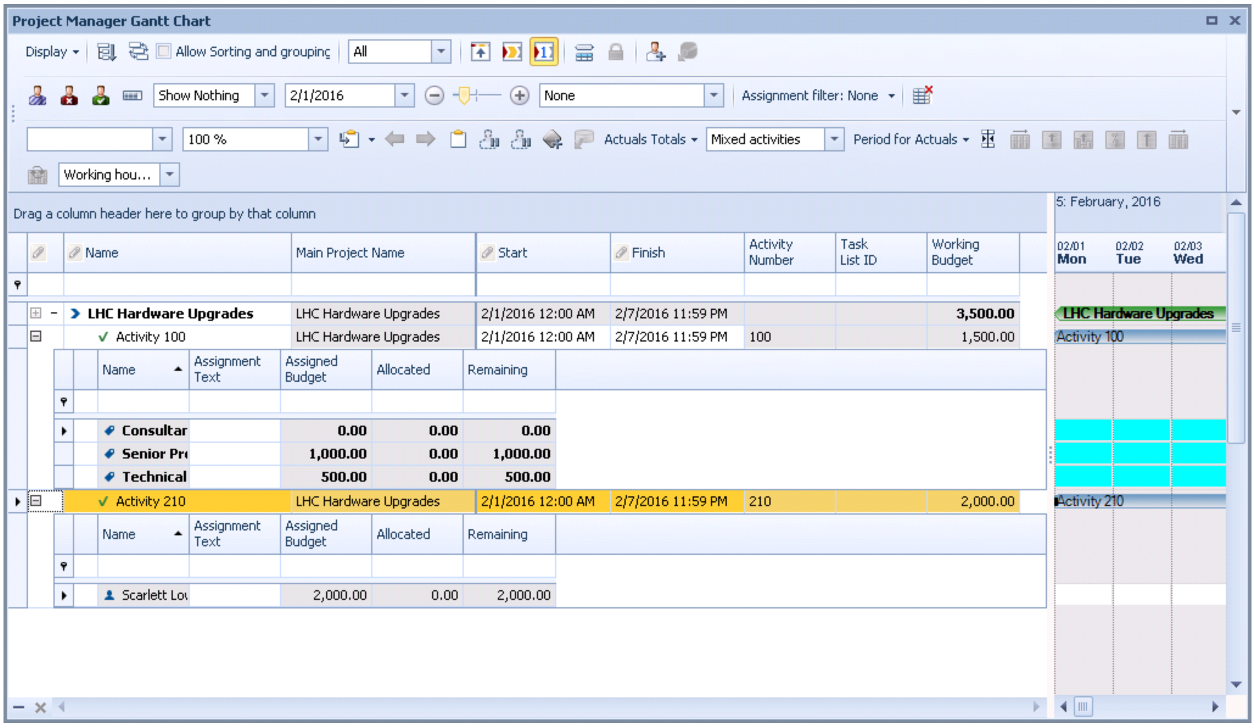
The following is an example of Group with Activity and Task.

- The two budget lines, 8 and 10, are grouped together. Their individual budgeted hours are summed together in the Working Budget column.
- The tasks are named according to the Activity and Task.


Project Manager Gantt Chart
Display
Allow Sorting and grouping
All
Show Nothing
2/1/2016
None
Assignment filter: None
100 %
Actuals Totals
Mixed activities
Period for Actuals
Working hou...
Drag a column header here to group by that column
5: February, 2016
Name
Main Project Name
Start
Finish
Activity Number
Task List ID
Working Budget
02/01 Mon
02/02 Tue
02/03 Wed
LHC Hardware Upgrades
LHC Hardware Upgrades
2/1/2016 12:00 AM
2/7/2016 11:59 PM
3,500.00
Activity 100 - Task 110
Activity 100 - Task 105
Activity 100 - Task 140
Activity 100 - Task 150
100
150
1,500.00
Name
Assignment Text
Assigned Budget
Allocated
Remaining
Senior Pr
1,000.00
0.00
1,000.00
Technical
500.00
0.00
500.00
Activity 100 - Task 100
Activity 100 - Task 160
Activity 100 - Task 135
Activity 100 - Task 130
Activity 100 - Task 145
Activity 210 - Task Extrn
210
Extrn
2,000.00

The following is an example of Group with Activity.

- All of the budget lines with Activity 100 are grouped together. The same is true of other Activities. The individual budgeted hours are summed together in the Working Budget column.
- The tasks are named according to the Activity.



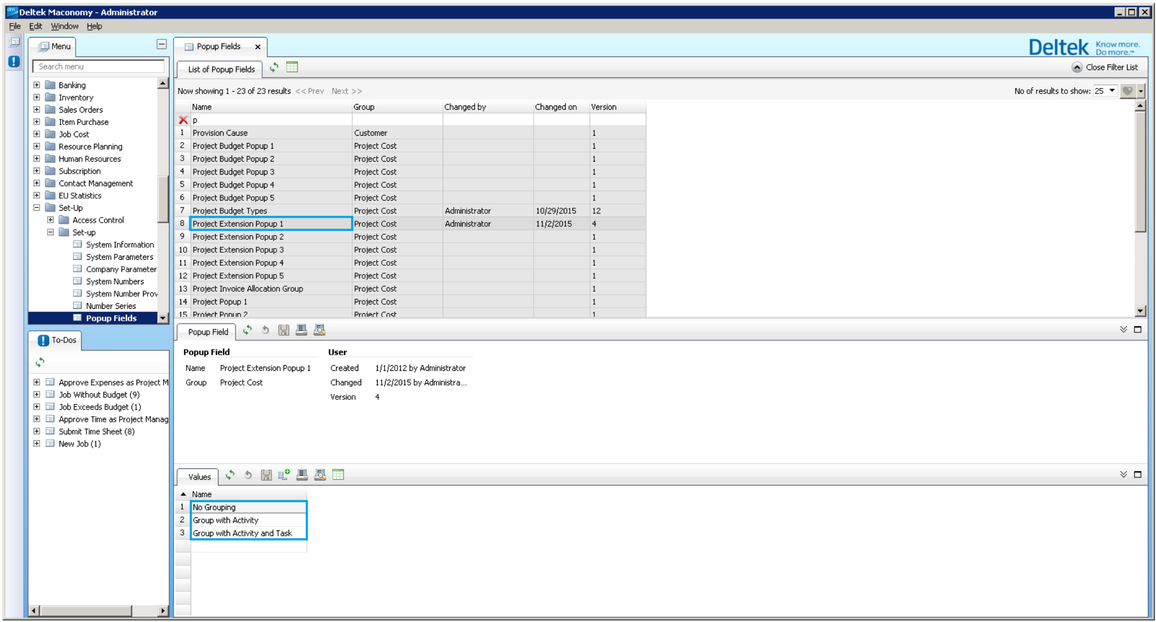
Setup

No configuration is necessary in People Planner; it is all set up in Maconomy.

To set up grouping:

1. Log in to the Maconomy Workspace Client as administrator.
2. Navigate to **Single Dialogs » Set-Up » Set-Up » Popup Fields**.
3. Locate the **Project Extension Popup 1**.

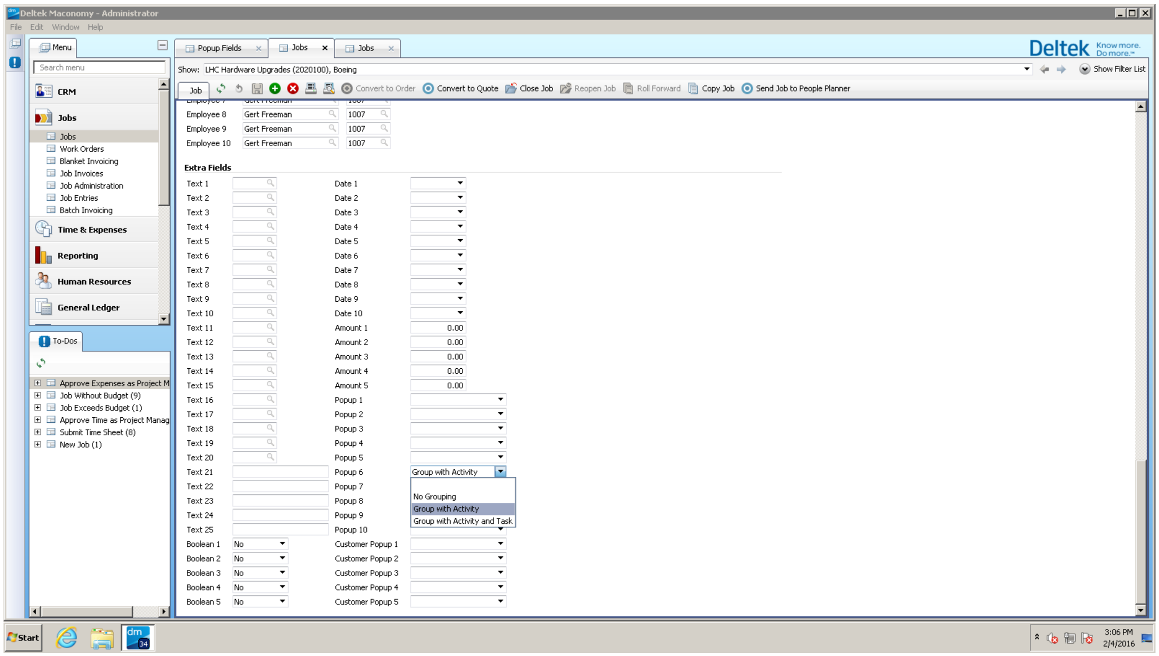
4. Edit this pop-up, and add the following values in the following order:
   a. **No Grouping**
   b. **Group with Activity**
   c. **Group with Activity and Task**



Next, you must choose one of these for the job you want grouped during import:

1. Log in to the Maconomy Workspace Client as administrator.
2. Navigate to **Single Dialogs » Job Cost » Creation » Jobs**.
3. Select the job.
4. Edit the **Popup 6** field, and select the appropriate grouping.

5. Import the job into People Planner.

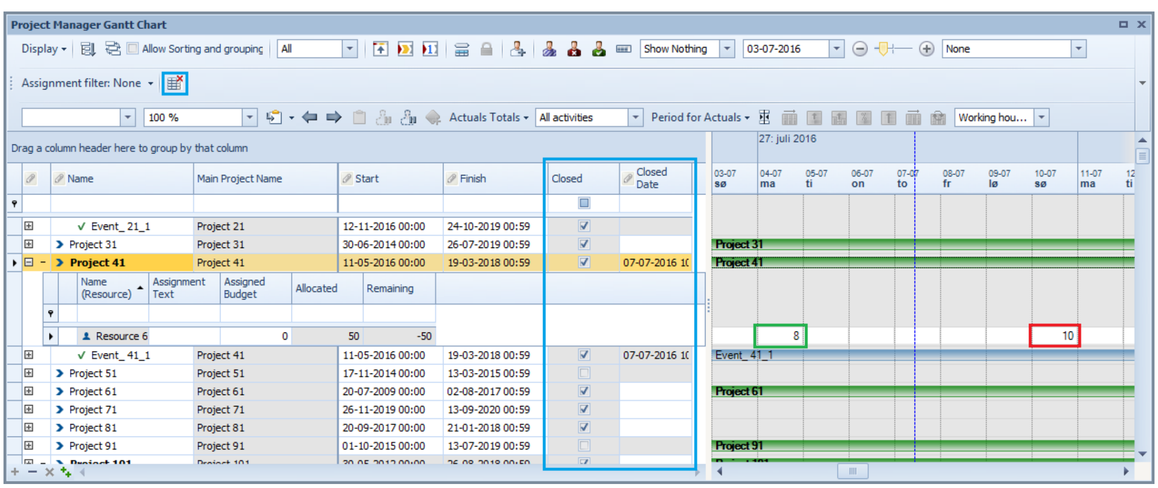


Of course, the last part is not an option for the normal Maconomy user. Instead, you do either of the following:

- Customize the WSC by adding the **Popup 6** field in the job window. This enables a user to actively select a grouping. In this case, you should rename the pop-up to something like “Grouping in People Planner.”
- Set the value in the job templates. In this way all jobs that are created from a template inherit a specific grouping.

Automatic Settle

You cannot perform planning on a closed project; that is, you cannot add new events, assign resources, or book them. However, there might still be remaining planning left on the project at the time that it is closed.

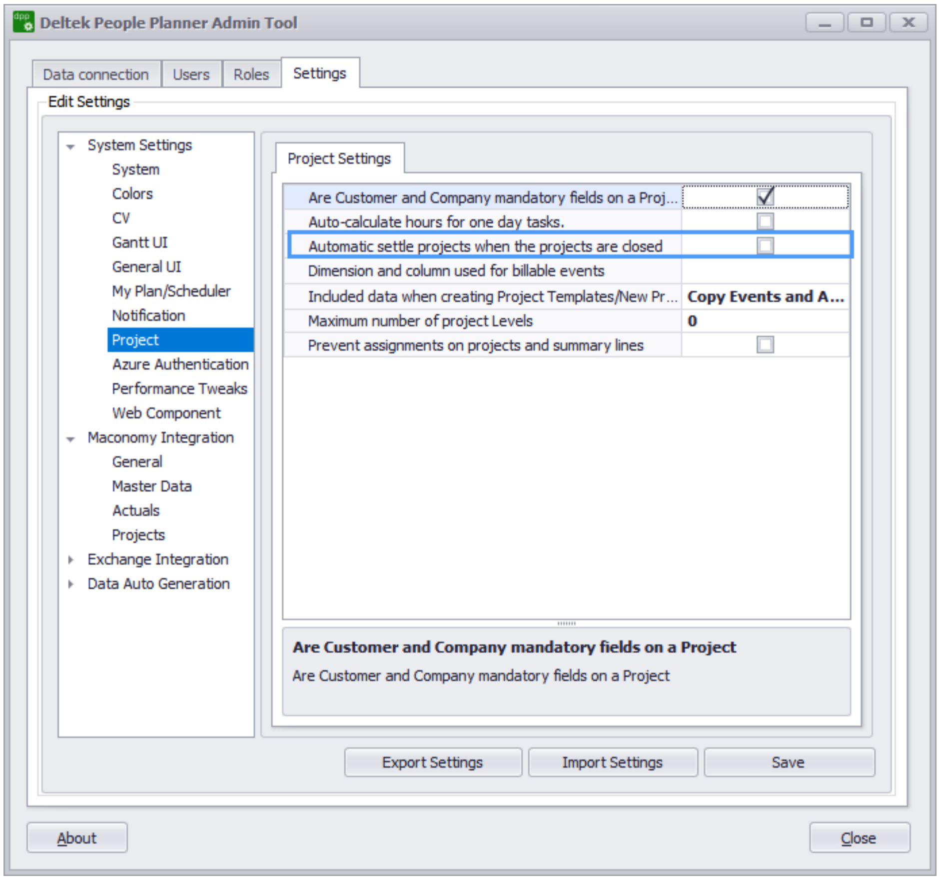


To remove remaining planning that is left on the project:

1. Edit the date in the **Closed Date** column to the correct date.
2. Click the **Settle Project** button.

This is a manual process; it works best if you close the project manually and then settle it. It does not work as well when the project is closed as part of the nightly project import from Maconomy.

People Planner 3.6.1 introduced the setting **Automatic settle projects when the project is closed**. You set it in the People Planner Admin Tool under **System Settings » Projects**.

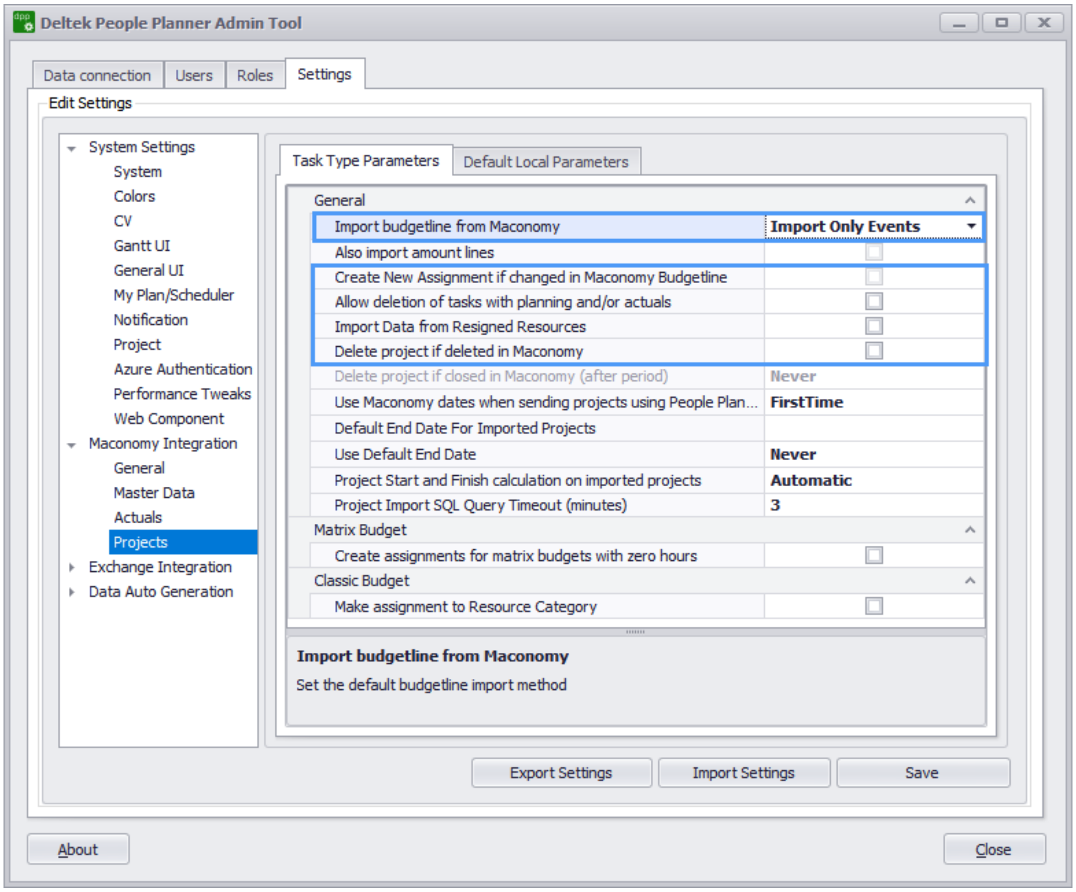


Option	Description
Selected	When a project is closed, it is automatically settled, as well. This happens regardless of how the project is closed—that is, if it is done manually or as a step in the project import.
Not Selected	The project is not settled when the project is closed. You can still settle the project manually.

Note: When you close a project manually, you can edit the Closed Date before you settle the project. This is not an option when you use the auto settle functionality. The Closed Date is set to the current time, and the settle function is invoked. Although you can still edit the Closed Date and resettle the project, bookings that were deleted as a result of the first settle are gone.

Conflicts during Import and Reimport

Maconomy allows users to edit a project after it has been imported into People Planner. If the project is later reimported into People Planner this can result in possible conflicts that must be resolved. People Planner has a few settings that control this.



Conflict #1: What should the resolution be if resources have been reassigned since the previous import?

1. A job + budget—with an assigned resource—is imported into People Planner.
2. A user starts to do planning in People Planner and makes some bookings on the assignment.
3. Later, a user changes the assigned resource in Maconomy to another.
4. The project is then updated (re-imported) into People Planner.

In this scenario, what should happen to the original assignment and the bookings? As a rule, such bookings are never deleted because they represent planning that should be preserved, unless the project manager deliberately chooses to discard it.

The setting **Create New Assignment if Employee is changed in Maconomy Budgetline** controls this.

Option	Description
Selected	▪ The old assignment is kept in People Planner, and a new assignment of the new employee is added. ▪ Any bookings made on the assignment, and made in People Planner, are kept on the old assignment.
Not Selected	▪ The old assignment is deleted, and an assignment of the new employee is created instead. ▪ Any bookings made on the assignment, and made in People Planner, are moved to the new assignment.

In a sense, the difference between the two options is whether People Planner plays it safe or tries to handle the change in a smart way.

Conflict #2: What should the resolution be if a budget line has been deleted since the previous import?

1. A job + budget—with an assigned resource on one of its budget lines—is imported into People Planner.
2. A user starts to do planning in People Planner and makes some bookings on the assignment.
3. Later, a user deletes the budget line in Maconomy.
4. The import runs again, and the project is updated in People Planner.

> **Note:** There may not necessarily have been an assigned resource to begin with. Alternatively, the resource could have been assigned in People Planner and bookings made on that assignment.

In this scenario, what should happen to the original task and the bookings?

The **Allow deletion of tasks with planning** setting controls this.

Option	Description
Selected	The task, including all of the planning, is deleted in People Planner, unless the task's line contains time registrations (from an actual import), in which case it is not deleted.
Not Selected	The task remains in People Planner, even though the original budget line does not exist in Maconomy anymore.

Conflict #3: What should the resolution be if a resource has resigned since the previous import?

1. In Maconomy:
    a. The employee is assigned to a budget line.
    b. The employee's Termination Date is set.
2. The project is imported into People Planner after the employee's Termination Date has passed.

An employee's Termination Date is imported into People Planner as the Employment End date on the resource. When the date has passed, you can assign the resource as long as the employment time overlaps with the time span to which the task/project is assigned. If you make a booking after the employment end date, you receive a warning. It can therefore be argued that it does not make sense for the import to assign the resource in the task.

The **Import Data from Resigned Resources** setting controls this.

Option	Description
Selected	The resource is assigned on the event.
Not Selected	The resource is not assigned on the event in People Planner.

Conflict #4: What should the resolution be if the project[10] has been deleted in Maconomy?

1. A job + budget is imported into People Planner.
2. A user starts to do planning in People Planner and makes some assignments and bookings.
3. Later, a user deletes the job in Maconomy.
4. The import runs again, and the project is updated in People Planner.

Should the project be deleted in People Planner, including all planning?

The **Delete project if deleted in Maconomy** setting controls this.

Option	Description
Selected	The project is deleted in People Planner the next time that the project is updated, or if the task for "Delete the deleted projects" is run.
Not Selected	▪ If a project has been imported from Maconomy into People Planner, and it is later deleted in Maconomy, it is not deleted in People Planner with the next import. ▪ The decision whether to delete the project in People Planner, and what to do with all of the planning, is left to the project owner.

Import Projects on the People Planner Side

You can import projects into People Planner on the People Planner side of the integration, or you can push them to People Planner on the Maconomy side. This section describes the first method. For the second method, see Push a Job on the Maconomy Side.

> **Note:** Depending on the configuration, importing projects uses either the MaconomyWS Web Service or the Maconomy RESTful Web Service. This section uses the term "Maconomy web service" to mean the relevant one. See Maconomy RESTful vs. MaconomyWS Web Service.

Projects can be imported manually or automated.

- Manual:
  - Use the Import Project view.

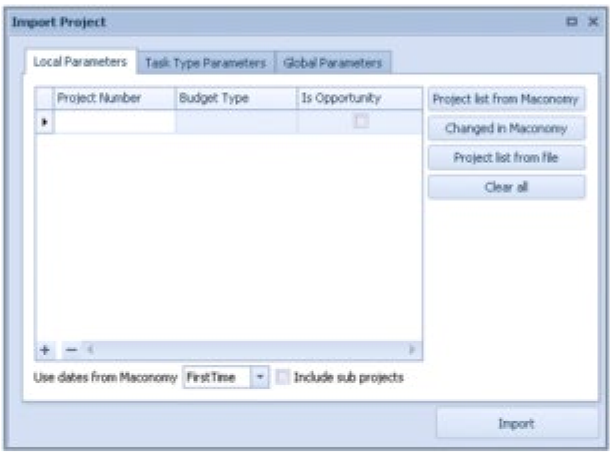
[10] Maconomy uses the term "job," rather than "project."

- Run the Task Specification manually.
- Run the Scheduled Task manually.
- (Update only) Select the project in the Project Managers Gantt Chart (PG) and click the **Update from Maconomy** button in the Ribbon.
- (Update only) Select the project in the Project Managers Gantt Chart (PG) and click the **Update from Maconomy** button in the PG.

- Automated:
  - Run the scheduled task according to its schedule.

Import Projects using the Import Project View

You can use the Import Project view to import a project directly.

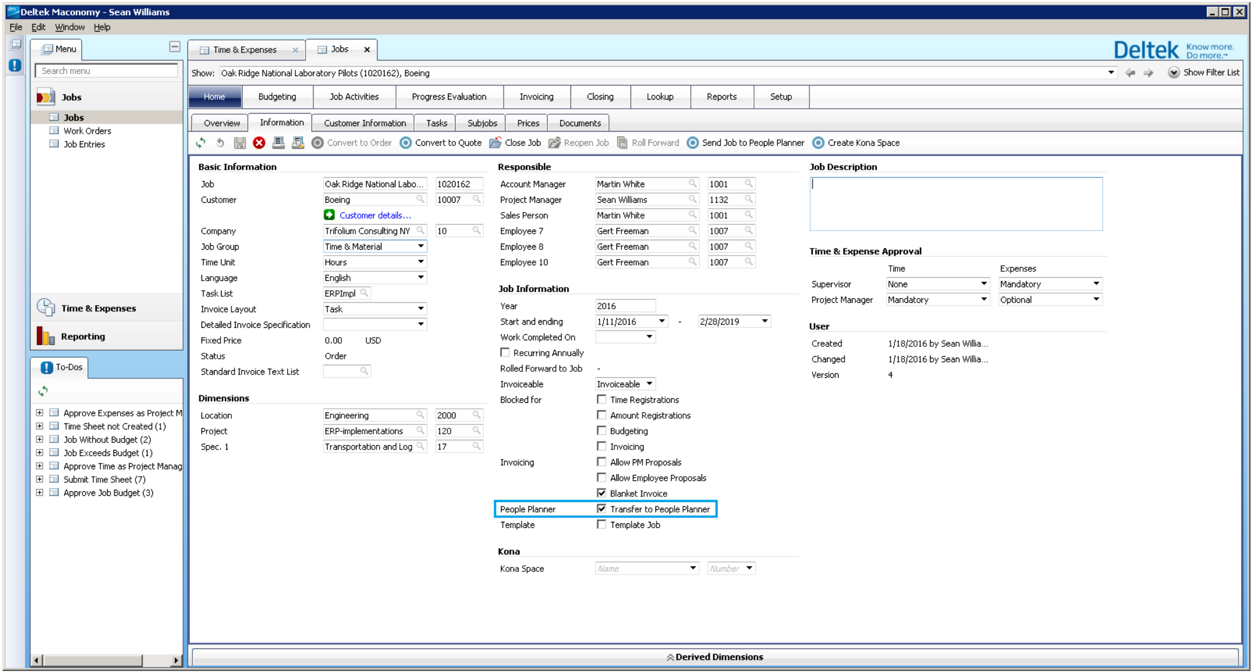


Provide a specific project number and click the **Import** button. This method works if you know the job number in advance. Alternatively, click one of the buttons that are described in the following table to get a list of choices.

Button	Description
Project list from Maconomy	Maconomy returns a list of all of the jobs in Maconomy. **Note:** You can adjust this list according to which jobs have the Transfer to People Planner field selected.
Changed in Maconomy	You are prompted for a date. Maconomy then returns a list of all of the jobs that have been changed in Maconomy since this date. This also includes any jobs that have been created. **Note:** You can adjust this list according to which jobs have the Transfer to People Planner field selected.

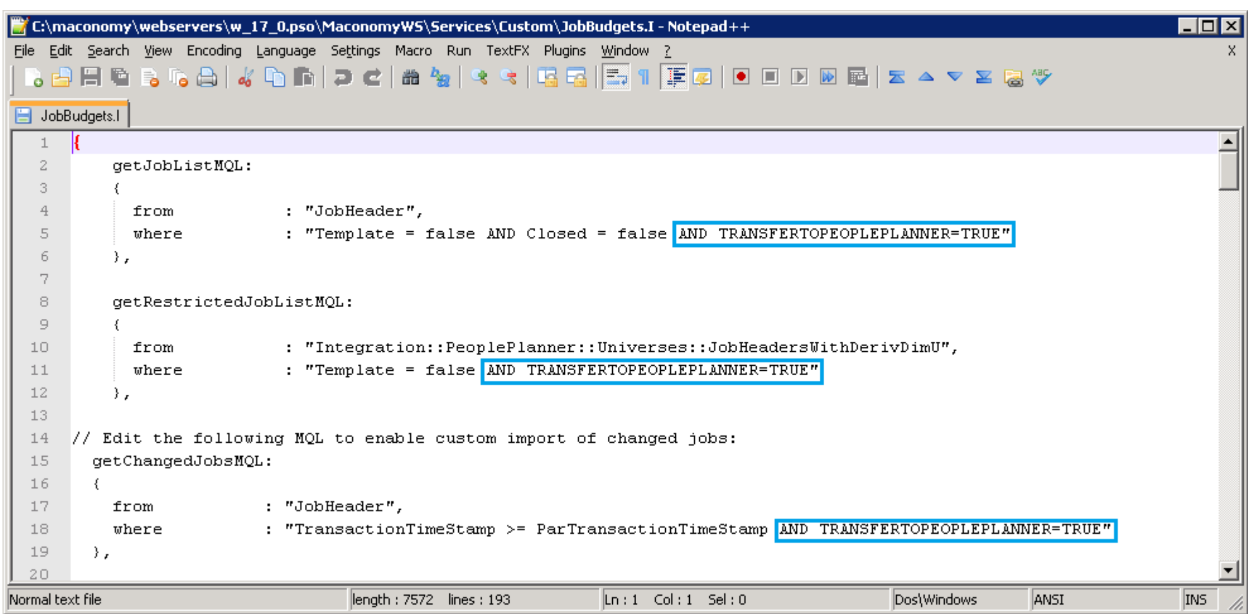
Project list from file	You are prompted for a file. People Planner reads the file and displays any jobs listed in the file. This file contains information in the format *project number*, *project name*, *project description*, *budget type*, *isOpportunity*—for example:
	
	`S-00044, “First Project”, “”. Working Budget, false`
	`B-34001, “An opportunity”, “”`
	
	This file must of course be created in some way, such as by extracting a list of jobs directly from the Maconomy database.

A job in Maconomy can be marked as Transfer to People Planner.



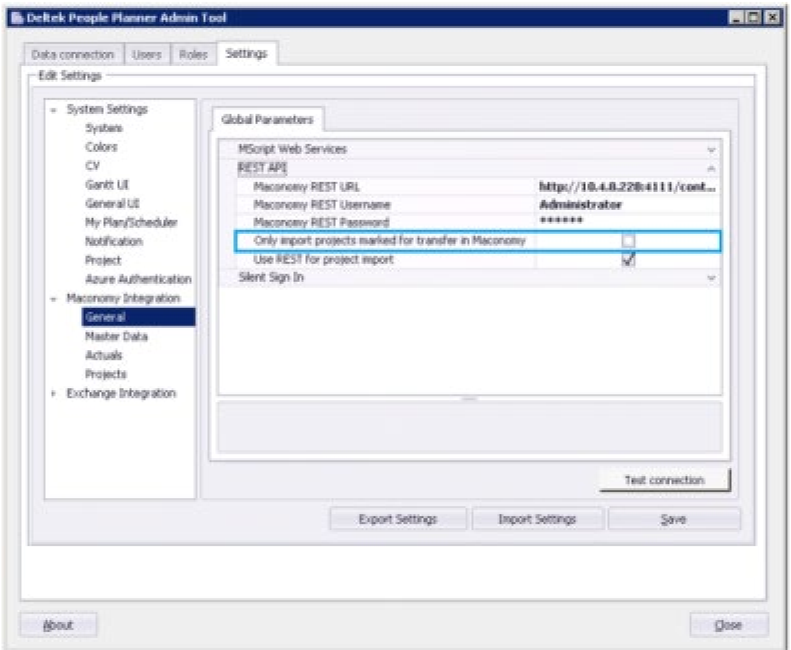
Depending on whether it is the MaconomyWS or the Maconomy RESTful web service that does the actual import, this selection is honored differently.

> **Note:** For MaconomyWS it is controlled by the JobBudgets.I file. Changes to this behavior should be done as a Maconomy customization.

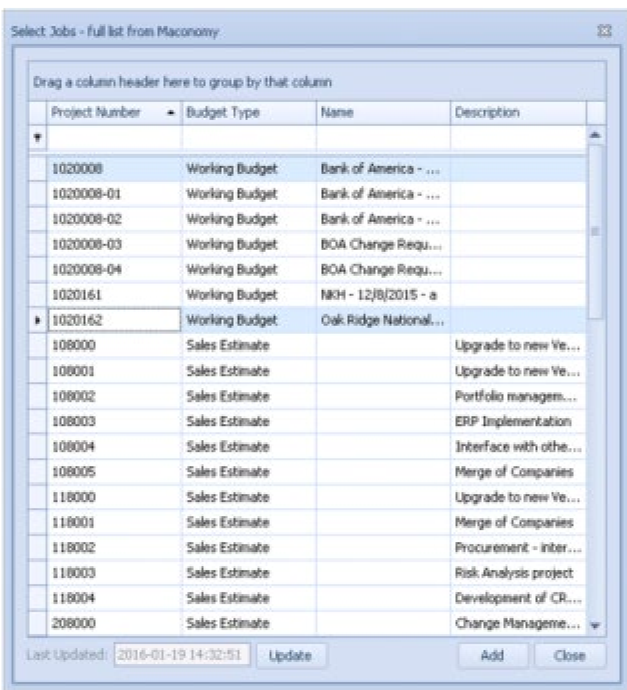



```
{
    getJobListMQL:
    {
      from            : "JobHeader",
      where           : "Template = false AND Closed = false AND TRANSFERTOPEOPLEPLANNER=TRUE"
    },

    getRestrictedJobListMQL:
    {
      from            : "Integration::PeoplePlanner::Universes::JobHeadersWithDerivDimU",
      where           : "Template = false AND TRANSFERTOPEOPLEPLANNER=TRUE"
    },

// Edit the following MQL to enable custom import of changed jobs:
  getChangedJobsMQL:
  {
    from            : "JobHeader",
    where           : "TransactionTimeStamp >= ParTransactionTimeStamp AND TRANSFERTOPEOPLEPLANNER=TRUE"
  },
```

The Maconomy RESTful web service does not support I-files; instead, it is controlled by a setting in the People Planner Admin Tool.

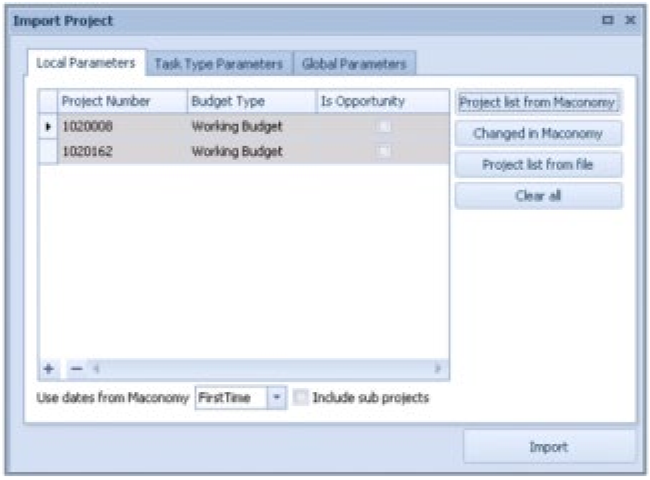


The list of jobs is shown in the Select Jobs view.



The Select Jobs view offers filtering and sorting on individual columns. You select one or more jobs from the list and click the **Add** button to add the jobs to the list in the Project Import view. Finally, you close the view by clicking the **Close** button.

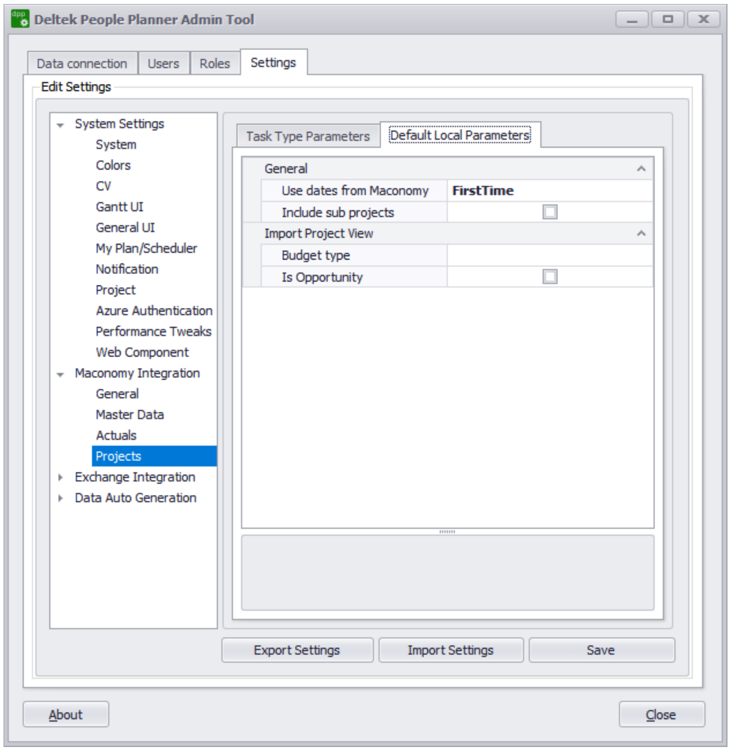
The selected jobs are added to the list in the Import Project view.



To import the selected project(s):

1. Set the **Use dates from Maconomy** control to determine how dates are handled. See Start and Finish Times for a detailed description.
2. Select the **Include sub projects** checkbox to determine if sub-projects should also be imported, even if they are not added to the list. In the preceding example, the four subprojects with job numbers 1020008-01, -02, -03, and -04 would also be imported.
3. Click the **Import** button to import the projects into People Planner.

Tip: When you open the Import Project view, some fields already have some preset values. These values are controlled from the People Planner Admin Tool. If you often find that you want to change the preset values in the Import Project view to something different, you can instead change the defaults in the Admin Tool.

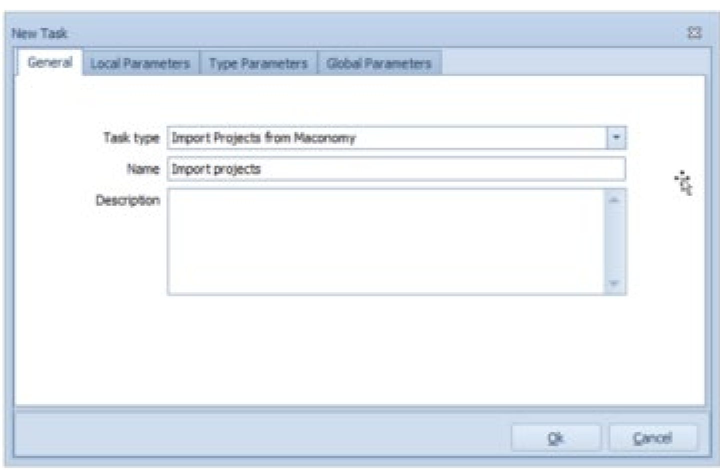


Note: When you import projects directly from the Import Project view, People Planner creates a System Task Specification and runs that. See System Task Specification.

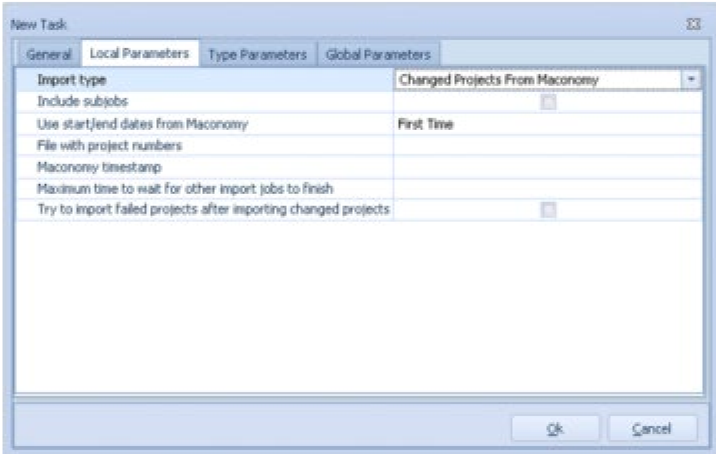
Import Projects using a Task

Although using the Import Project view is one way to import one or more projects, it is much more useful to base project imports on a Task Specification.

The Task Specification should be of task type Import Project from Maconomy and should be given a descriptive name.



The Local Parameters tab provides options for configuring the task specification.



> **Note:** The remaining two tabs, Type Parameters and Global Parameters, provide a view of some of the relevant project import settings from the people Planner Admin Tool. However, since they cannot be edited in the Task Specification, they are not shown here.

The Local Parameters tab contains the following settings.

Setting	Notes	For More Information
Import type	This setting has the following options: ▪ All Projects In People Planner ▪ Changed Projects From Maconomy ▪ File With Project Numbers If the Task Specification is intended for use with a scheduled task that updates People Planner with jobs from Maconomy evenly night, select Changed Projects …	See in this section under the subsection about using the Import Project view.
File with project numbers	Use this setting only when the import type is File with Project Numbers, in which case it is required.	
Maconomy timestamp	Use this setting if Import Types has been set to Changed Projects From Maconomy. Set this to an initial value to determine the how far back People Planner should look for changed projects. Whenever the Task Specification is executed, the value is updated with the execution time.	
Include subprojects		

Setting	Notes	For More Information
Use start/end dates from Maconomy		Start and Finish Times
Maximum time to wait for other import jobs to finish		
Try to import failed projects after importing changed projects	If, for some reason, a job cannot be imported, it is marked as a failure in the project import. This setting determines whether the project should try to reimport all failed jobs at the end of the import. This handles the cases where the job cannot be imported because, for example, Maconomy has a lock on it; when the lock is later released by Maconomy the project is then imported. However, this setting does not provide any guarantee that a failing project is ever imported. Therefore, the execution log for the Task Specification should always be inspected on a regular basis.	

Tip: When you create a Task Specification to import projects, it has some preset values under the Local Parameters tab. These defaults are controlled from the People Planner Admin Tool. If you often find that you want to change the preset values on the Local Parameters tab to something different, you can instead change the defaults in the Admin Tool.

When you have created a task specification you can either run this directly, or you can build a scheduled task on top of it and run this instead. See Tasks for how to do this.

Update a Project using the Ribbon

If a project has already been imported into People Planner, and you suspect that it has been updated in Maconomy, you can update it directly from the Ribbon.

1. Open the Project Manager Gantt chart.
2. Select the project that you want to update.
3. Navigate to **Ribbon » Import and Export**.
4. Click the **Update from Maconomy** button.

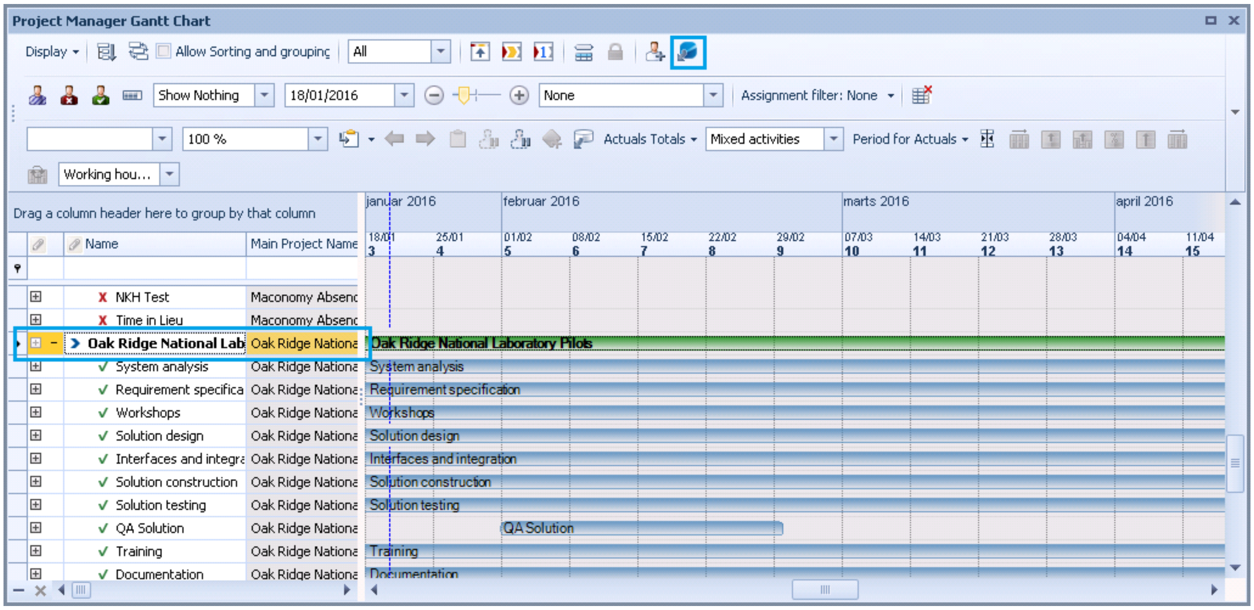
When you import projects in this way, People Planner creates a System Task Specification and runs that. See System Task Specification.

Update a Project using the PG

A more direct alternative to using the Ribbon is to click the same button in the Project Manager Gantt (PG) chart.

If a project has already been imported into People Planner, and you suspect that it has been updated in Maconomy, you can update it directly from the PG.

1. Open the Project Manager Gantt chart.
2. Select the project that you want to update.
3. Click the **Update from Maconomy** button.



When you import projects in this way, People Planner creates a System Task Specification and runs that. See [System Task Specification](#).

Push a Job on the Maconomy Side

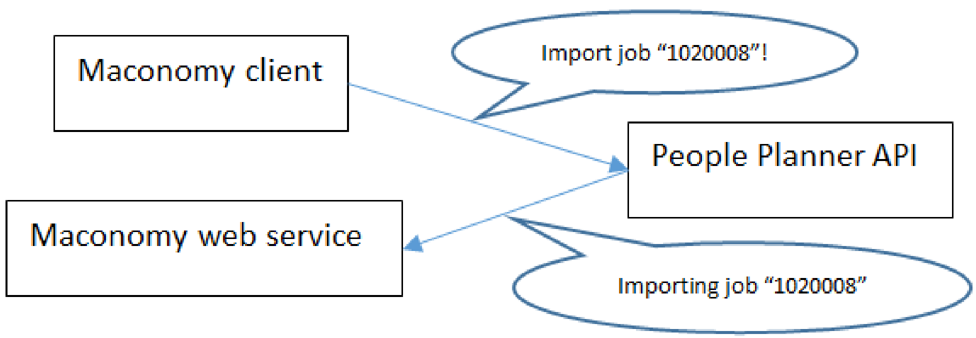
You can import projects into People Planner on the People Planner side of the integration, or you can push them to People Planner on the Maconomy side. This section describes the second method. For the first method, see Import Projects on the People Planner Side.

> **Note:** Depending on the configuration, the import of projects uses either the MaconomyWS Web Service or the Maconomy RESTful Web Service. This section uses the term "Maconomy web service" to mean the relevant one. See Maconomy RESTful vs. MaconomyWS Web Service.

Sending a job from Maconomy is often described as a "push" because a user experiences it as if the project is sent from Maconomy to People Planner. However, a more accurate name would be "Request to Import"; what happens is that Maconomy calls People Planner with the project number and asks People Planner to import the project, which People Planner then does.

This means that the Request-to-Import is actually a two-step workflow under the hood.

1. The Maconomy client calls the People Planner API web service with a job number.
2. The People Planner API calls back to the Maconomy web service and imports the job with the specified job number.



Troubleshooting

If the push project fails, it is good idea to test each of these steps individually.

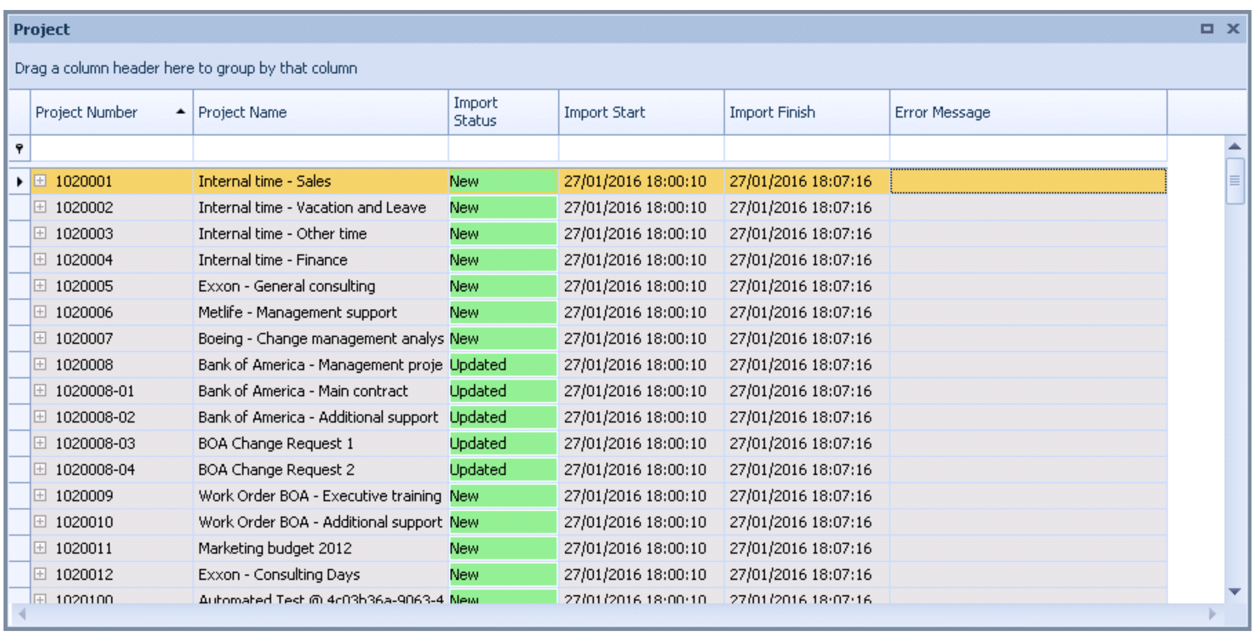
Step	Answer	Cause
Can People Planner import a project from Maconomy?	No	The problem is most likely to be found in how the People Planner ⇔ Maconomy integration has been configured. Things to examine: ▪ Use the People Planner Admin Tool to test the connection. ▪ Examine the log file of the People Planner Windows application. Examine the log of the Maconomy web service.
	Yes	Continue with the next step.

Step	Answer	Cause
Can the WSC push a job to Maconomy?	No	The problem is most likely to be found in how Maconomy calls the People Planner API. Things to examine: ▪ Does Maconomy have the correct URL and credentials for calling the People Planner API web service? ▪ Is the People Planner API configured correctly? 1. Is its dataConnection.xml file correct? 2. Is it configured to use Anonymous Authentication? 3. Is it configured to use a user that exists in the People Planner database? ▪ Examine the IIS log: Does the People Planner API get called, and which status code does it respond with? The status code should be 200. Examine the log of the People Planner API.

Data-Centric View for Importing Projects

The data-centric view for project import summarizes which projects have been imported and whether there were any problems.

This view is located at **Views » Tasks » Import Results » Project**.



Project

Drag a column header here to group by that column

Project Number	Project Name	Import Status	Import Start	Import Finish	Error Message
1020001	Internal time - Sales	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020002	Internal time - Vacation and Leave	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020003	Internal time - Other time	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020004	Internal time - Finance	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020005	Exxon - General consulting	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020006	Metlife - Management support	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020007	Boeing - Change management analys	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020008	Bank of America - Management proje	Updated	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020008-01	Bank of America - Main contract	Updated	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020008-02	Bank of America - Additional support	Updated	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020008-03	BOA Change Request 1	Updated	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020008-04	BOA Change Request 2	Updated	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020009	Work Order BOA - Executive training	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020010	Work Order BOA - Additional support	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020011	Marketing budget 2012	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020012	Exxon - Consulting Days	New	27/01/2016 18:00:10	27/01/2016 18:07:16	
1020100	Automated Test @ 4c03b36a-9063-4	New	27/01/2016 18:00:10	27/01/2016 18:07:16	

You can combine the data-centric view with the execution log views in much the same way as for scheduled tasks.

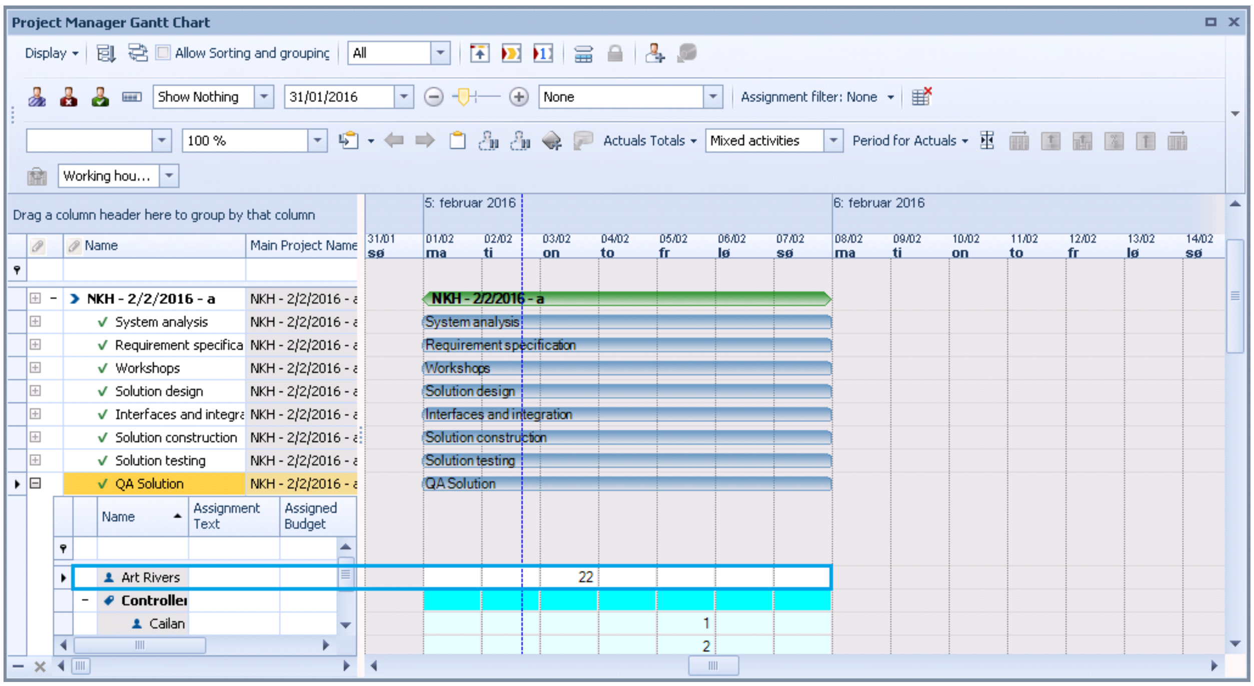
Export Favorites to Maconomy

The term Export Favorites to Maconomy is a bit of a misnomer; People Planner does not actually have any favorites that it can export.

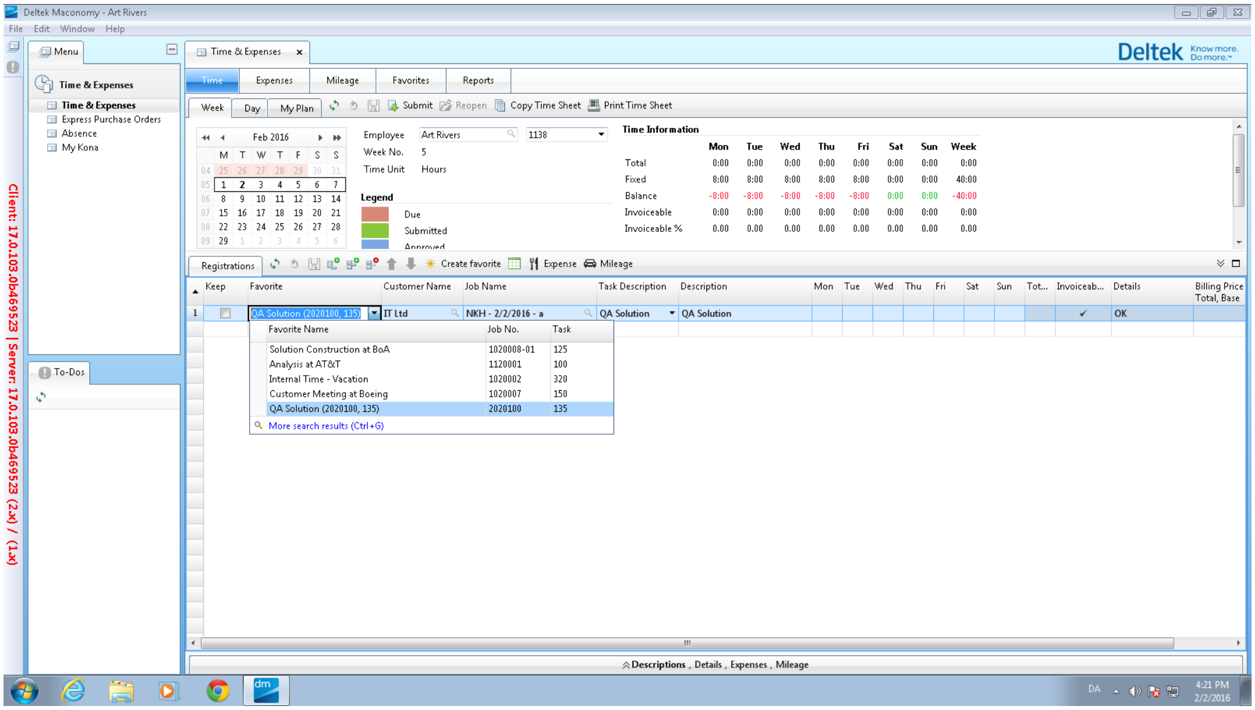
What happens is this:

1. A job—with a budget and assigned resources, such as Art Rivers, on some of the budget lines—is imported into People Planner.
2. As part of the planning on the project, the project manager starts to make bookings for Art Rivers.
3. As soon as there are bookings, it is relatively safe to assume that Art Rivers will start working on the project at some point.
4. This means that Art Rivers will need to do time registrations.

To facilitate this, People Planner can call the MaconomyWS web service and instruct it to create a favorite for Art Rivers. In the following example, Art Rivers has been booked on the QA Solution task.



The following figure shows the favorite in the WSC.



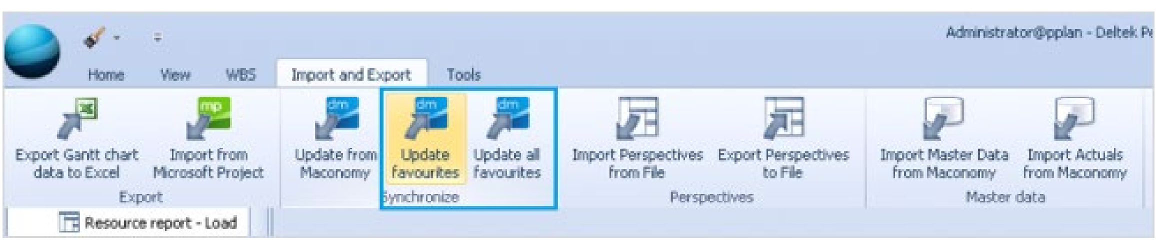
Export Favorites using a Task

You can export favorites by creating a Task Specification. See Tasks for more information about Task Specifications and scheduled tasks.

There are no extra Local Parameters to be set up for this type of Task Specification.

Export Favorites using the Ribbon

You can export Favorites from the Ribbon.



There are two variants for this.

Button	Description
Update favorites	In this scenario, you have the PG open, and have selected a project. When you click the button, the favorites for this project alone are updated in Maconomy.
Update all favorites	In this scenario, the favorites for all projects are updated in People Planner.

Import Absences from Maconomy to People Planner

This functionality is based on the same Task Specification functionality that is used for other imports from Maconomy and should be familiar to you if you have worked with this.

This functionality has the following special requirements:

- You must use People Planner 3.6 or newer.
- You must use Maconomy 2.2.2 or newer.
- It uses the Maconomy RESTful web service for the import.

In this integration, absences are administrated in Maconomy and then imported into People Planner, for example, by a scheduled task that runs every night.

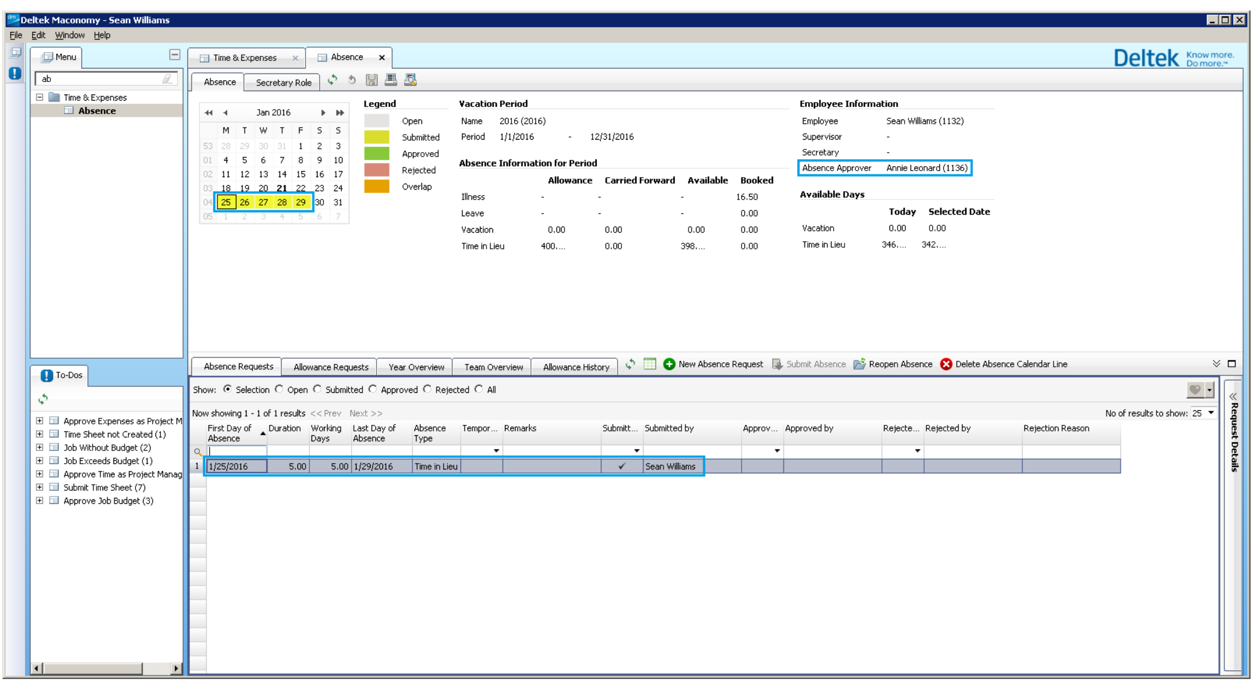
Unlike other the types of imports, there is no special section in the People Planner Admin Tool for the Absences import.

> **Note:** People Planner has always supported creating absences directly from the People Planner Windows application or from the MyPlan web application. It continues to do so. However, there was no option for exporting such absences from People Planner to Maconomy.

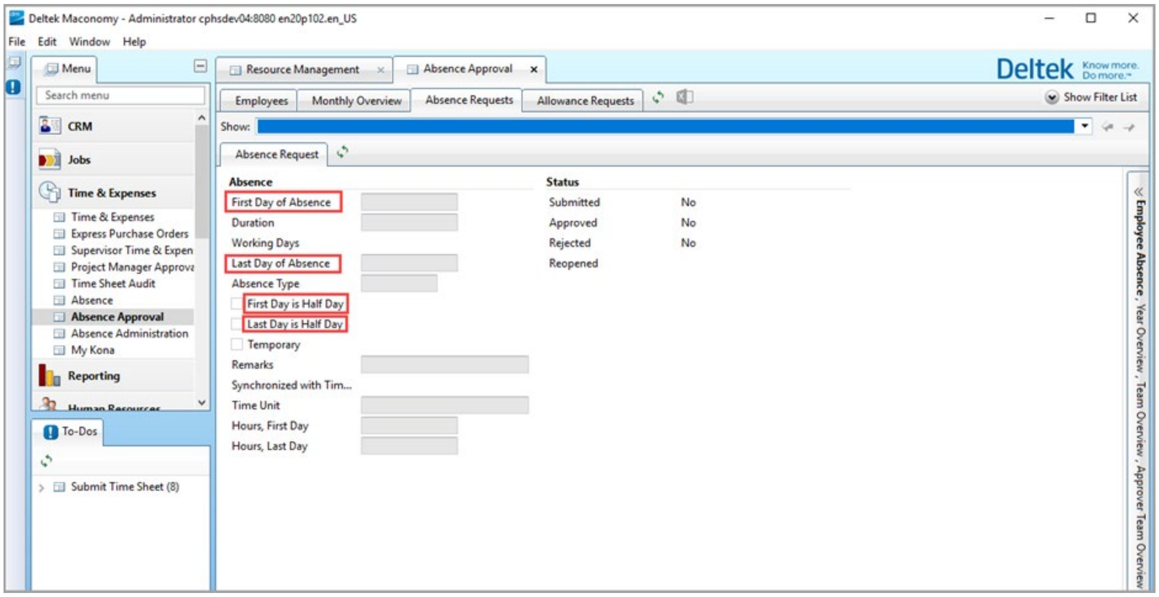
Basics of Absences Import

A user requests an absence in Maconomy. The absence is maintained in Maconomy, and the numbers are imported into People Planner to assist with planning, for example, to avoid booking resources when they are on vacation.

In the following example, Sean Williams has requested Time in Lieu absence in the week 01/25 – 01/29. The absence has been submitted, but has not yet been approved by Annie Leonard, his Absence Approver.



Annie Leonard must approve Sean Williams's absence request before it is imported into People Planner.



People Planner does not support the Maconomy fields Time Unit, Hours, First Day and Hours, Last Day. During an import from Maconomy, these fields are ignored.

The fields Duration and Working Days (shown in the preceding figure) do not affect bookings that are made in People Planner. They are only used to log warnings in the log file if a mismatch occurs.

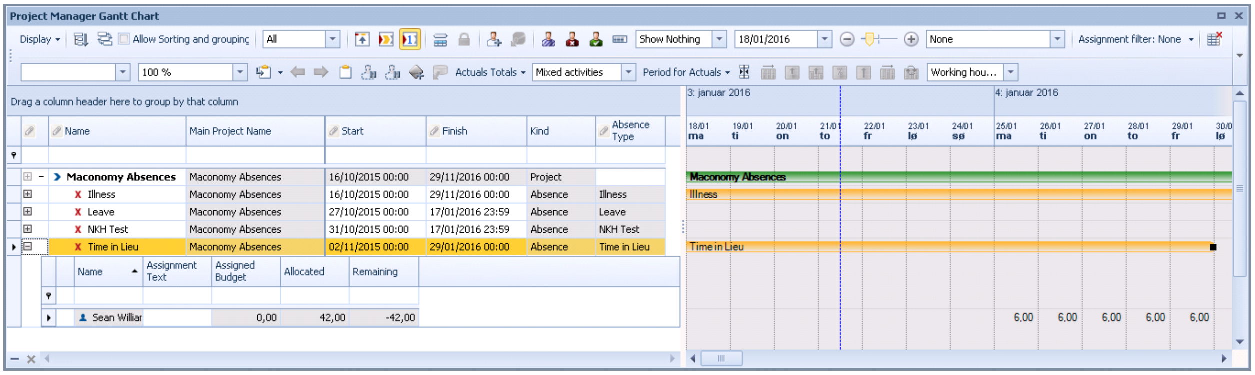
In People Planner an absence booking is based on only the following fields (highlighted in the preceding figure):

- First Day of Absence
- Last Day of Absence
- First Day is Half Day
- Last Day is Half Day

in combination with the resource calendar in People Planner.

> **Note:** People Planner does not import absences from Maconomy unless they have been approved. This does not depend on the absence type; for example, absences due to Illness must still be approved before they are imported into People Planner.

Absences in Maconomy are imported into a special project in People Planner named Maconomy Absence**s**. If the project does not exist, People Planner automatically creates it.



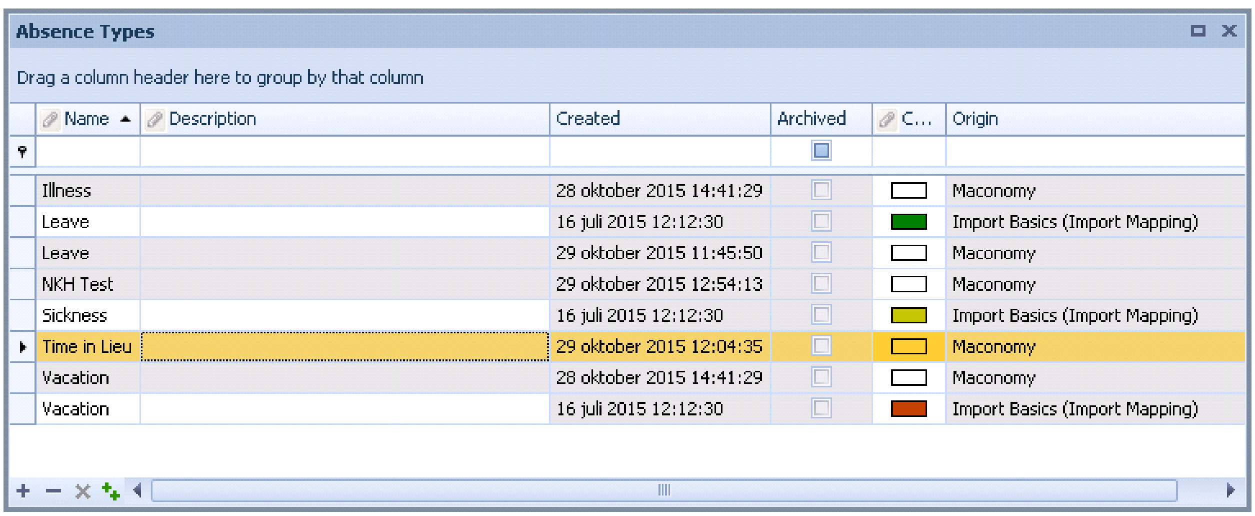
Each absence-type from Maconomy is represented as an event on the absence project:

- The name of the event is the same as the Absence Type.
- The event is of Kind = Absence.
- The Absence Type of the event is the same as the Absence Type in Maconomy.

If the Absence Type does not already exist in People Planner—for example, if a new Absence Type has been added in Maconomy since the last Absence-import—it is automatically created.

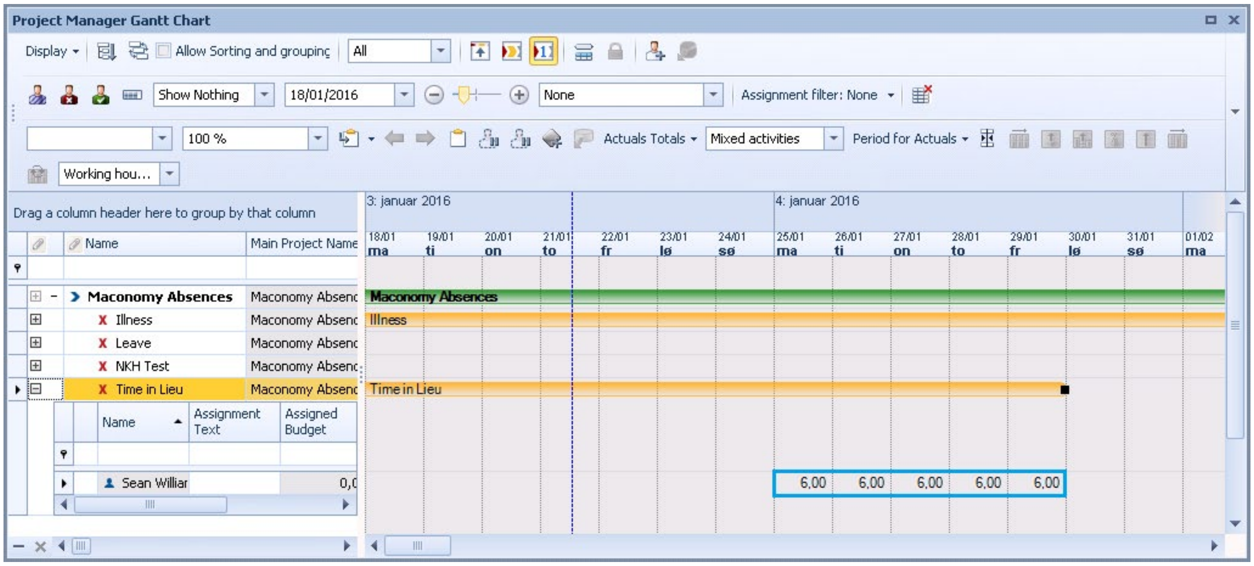
Note: Importing the absence types themselves is an integrated part of the Import Absences functionality; absence types are not imported as part of the master data import.

You can find the available Absence Types at **Views » Projects » Parameters » Absence Types**.



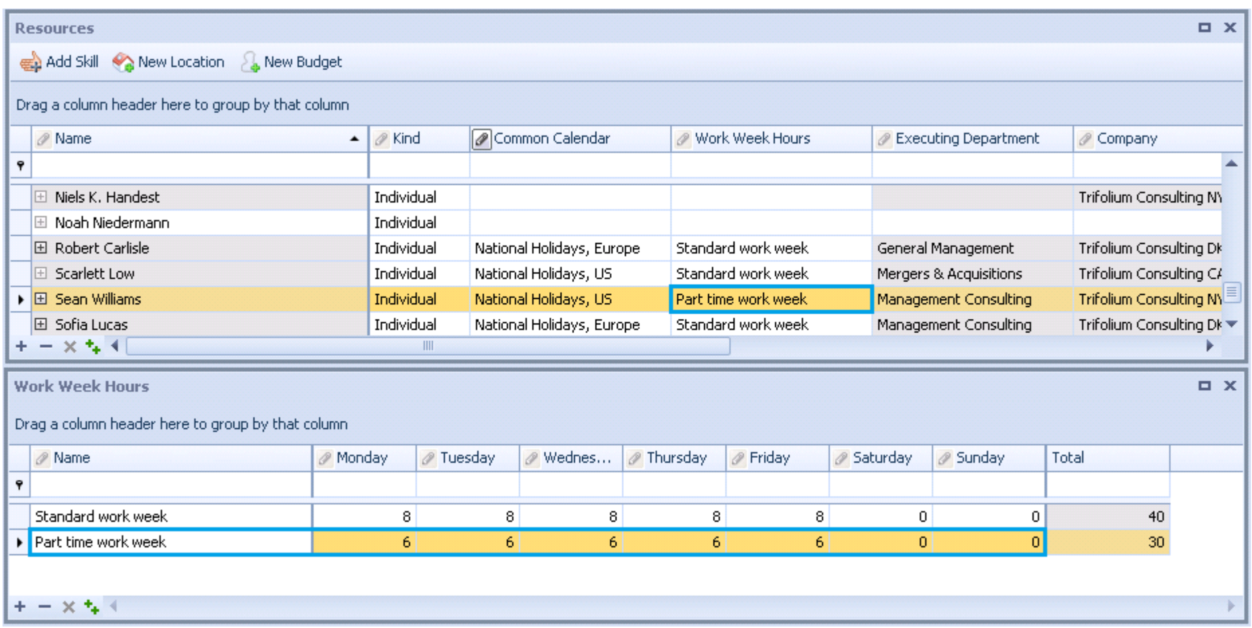
Name	Description	Created	Archived	C...	Origin
Illness		28 oktober 2015 14:41:29			Maconomy
Leave		16 juli 2015 12:12:30			Import Basics (Import Mapping)
Leave		29 oktober 2015 11:45:50			Maconomy
NKH Test		29 oktober 2015 12:54:13			Maconomy
Sickness		16 juli 2015 12:12:30			Import Basics (Import Mapping)
Time in Lieu		29 oktober 2015 12:04:35			Maconomy
Vacation		28 oktober 2015 14:41:29			Maconomy
Vacation		16 juli 2015 12:12:30			Import Basics (Import Mapping)

Sean Williams's absence request is represented as bookings on the relevant absence event.



In Maconomy, the granularity of an absence is for either a half or a full day; it cannot be for only one hour, for example. When the absences are imported into People Planner, a "half-day" and a "full day" absence are translated into a number of hours according to how many hours the resource has in his or her calendar.

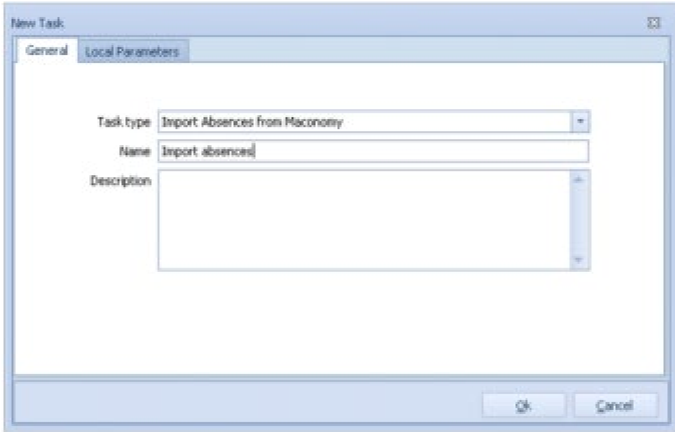
In the example, Sean Williams has a 6-hour workday week, and his absence in Maconomy is for 5 full days. He is therefore booked for 5 times 6 hours in People Planner.



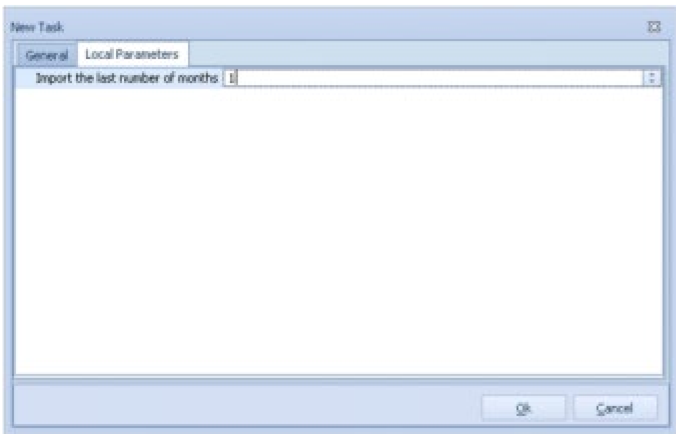
Import Absences using a Task

Absences can be imported by creating a Task Specification. See Tasks for more information about Task Specifications and scheduled tasks.

A new Task Type was added in People Planner 3.6.



A single setting is available under the Local Parameters tab.

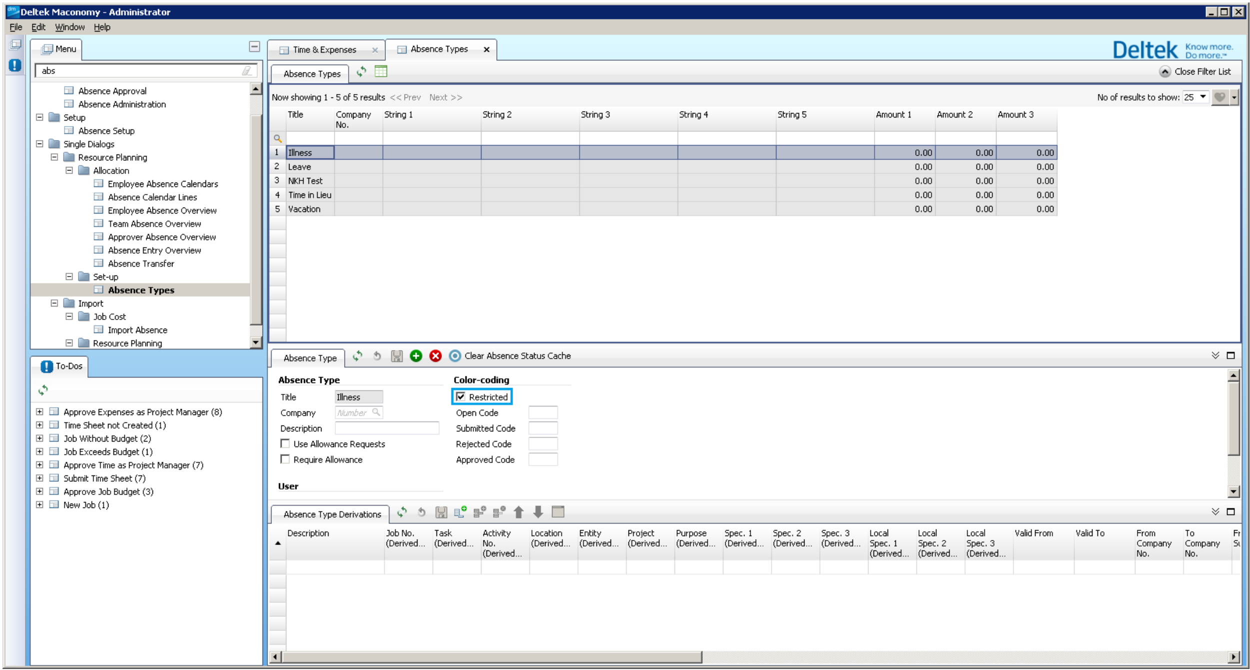


The **Import the last number of months** setting determines from how far back into the past absences are to be imported. When importing absences, People Planner starts by deleting any existing absences back to this date, before importing all absences, including all of the future ones. This ensures that People Planner is kept updated even if an existing absence request has later been deleted in Maconomy.

Data Limitation on Assignments

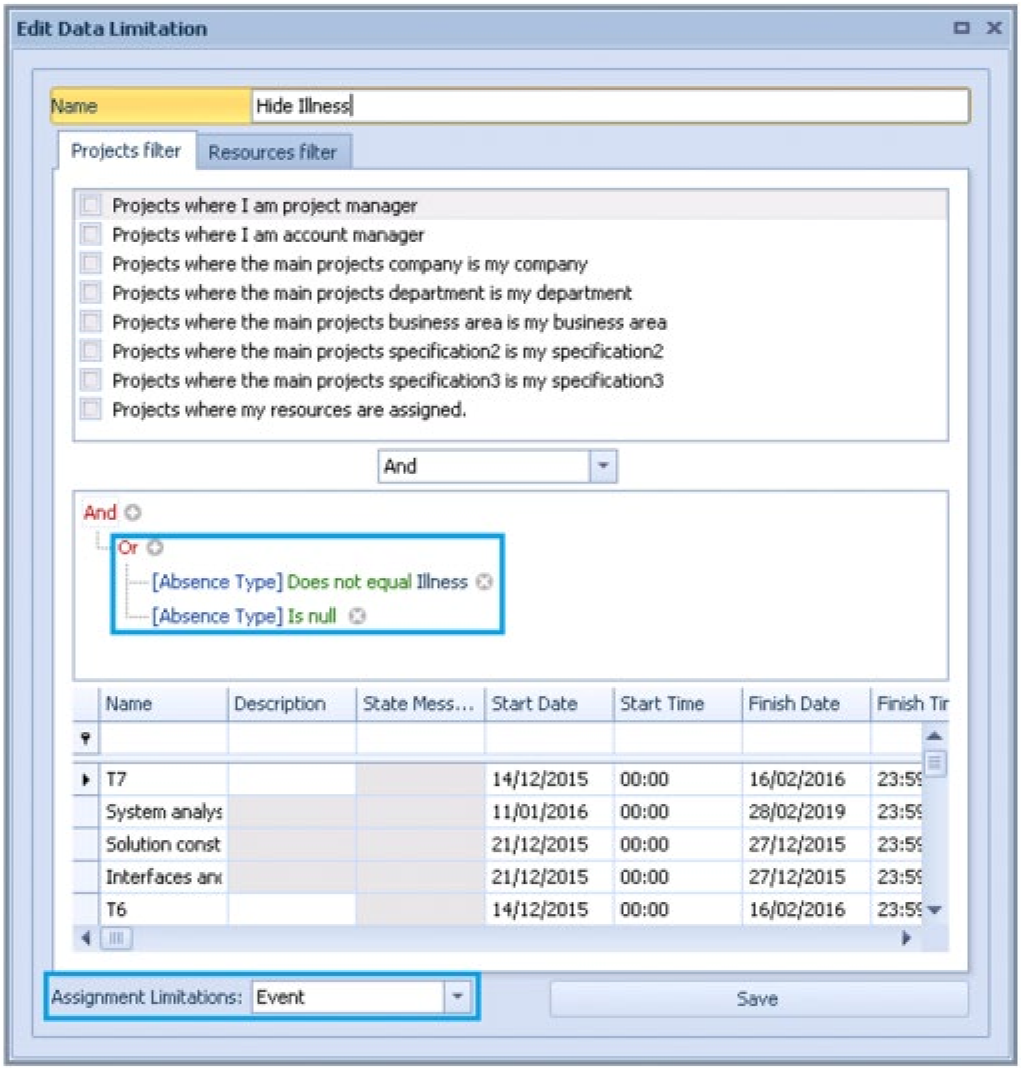
There are usually regulatory requirements on which absences the users are allowed to see; for example, it is probably not allowed for just anyone to see if Sean Williams is sick.

In Maconomy, this is controlled by selecting the Restricted checkbox on the Absence Type.



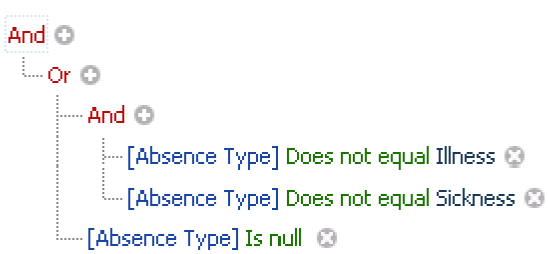
In People Planner, this is handled by creating a data limitation and assigning this to all of the user roles. Those roles that need access to the information, such as the HR department, do not get the data limitation.

The following data limitation accomplishes this.



The middle part defines an expression that hides any events that have the Absence Type = Illness.

If you need to hide more than one absence type, you can add each one as a separate *and* clause.



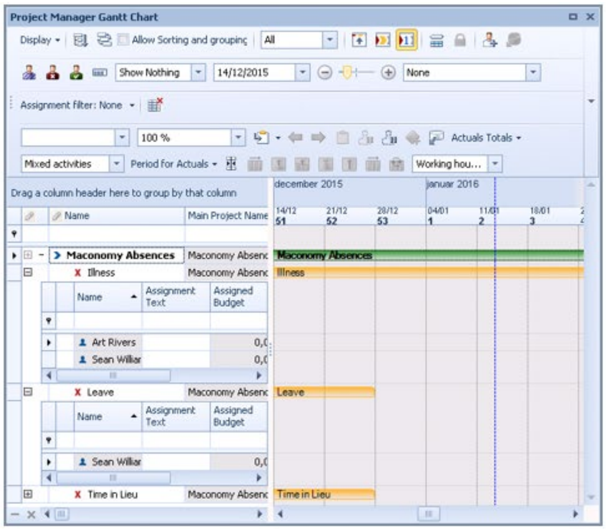
Warning: If you do not add the “Is null” clause, People Planner does not show the events that do not have an absence type at all. That is, it does not show most of the events that make up the projects.

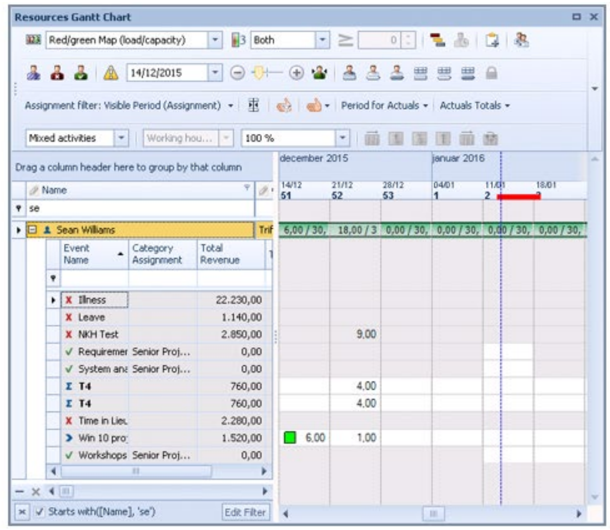
The Assignment Limitations part was introduced in People Planner 3.6. Before 3.6, you could not use a data limitation to filter on assignments.

The following set of figures shows the PG and RG when the data limitation is not hiding assignments on Illness.

On the left side, the PG shows the Illness event and shows that Art Rivers and Sean Williams are both booked on it.

On the right side, the RG shows that Sean Williams is assigned on Illness.

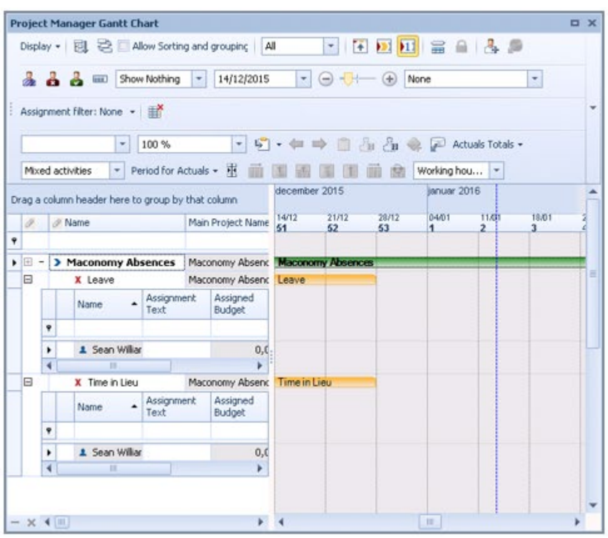


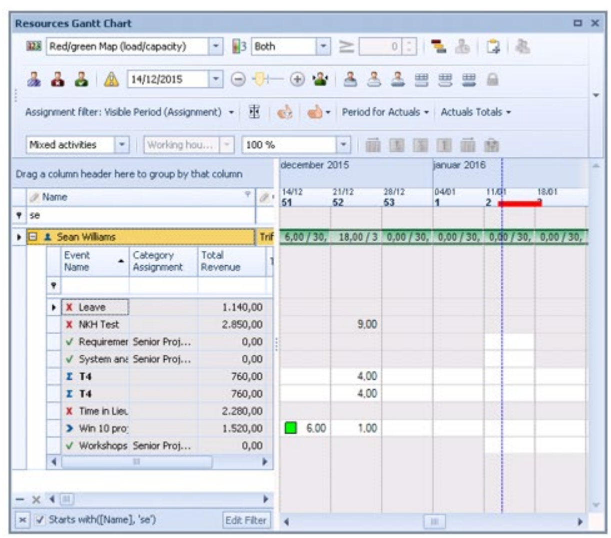


The next set of figures shows the same data, but this time the data limitation is hiding any hints of the Illness absence.

On the left side, the PG does not show the Illness absence, and with it the two assignments of Art Rivers and Sean Williams.

On the right side, the RG does not show that Sean Williams is assigned on Illness:





Data-Centric View for Importing Absences

People Planner does not have a data-centric view for the absence import.

Import Actuals from Maconomy

This integration imports actuals from Maconomy into People Planner. An important example of actuals is time registrations.

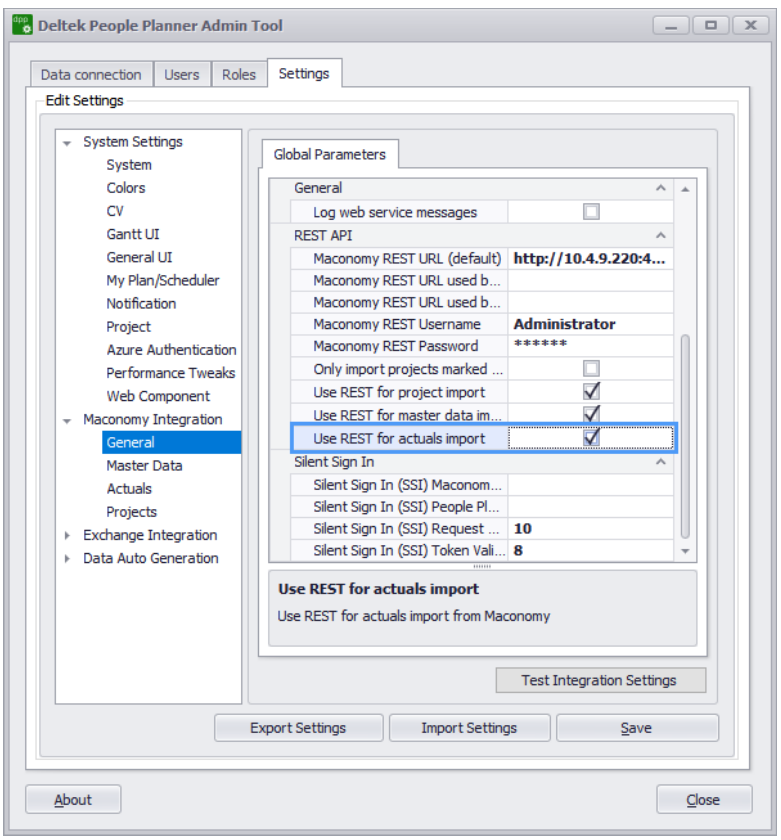
The term “actuals” refers to the fact that these are the “actual values,” as opposed to the planning values; the bookings are the planned hours, and time registrations are the actual hours spent on a project. By importing the actuals, you can compare your planning with how the project ended up looking.

People Planner provides two Task Specifications to support the import of actuals:

- **Import Actuals from Maconomy** – Import actuals for an entire project, or specify a period for which they should be imported.
- **Import Incremental Actuals from Maconomy** – Import only new and modified actuals.

The import actuals uses either the MaconomyWS Web Service or the Maconomy RESTful Web Service to do the actual import. See Maconomy RESTful vs. MaconomyWS Web Service for a description of this.

You select the web service to use in the Admin Tool.



In People Planner 4.5, an early adopter feature to import all actuals for a specific project is available. To use this feature, select the **Enable button for project specific actuals import** in the Admin Tool. This setting can be found in Early Adopter » Actuals Import. When this setting is enabled, you can add the **Import Actuals** button to the Web Components toolbar by selecting it in the Available Toolbar Controls.

> **Note:** You can only import events that are projects and have been imported from Maconomy. This functionality is disabled if the selected event is a non-project, closed, or read-only.

Attention: Early adopter features should only be used under specific direction from Deltek.

Actuals Accounts

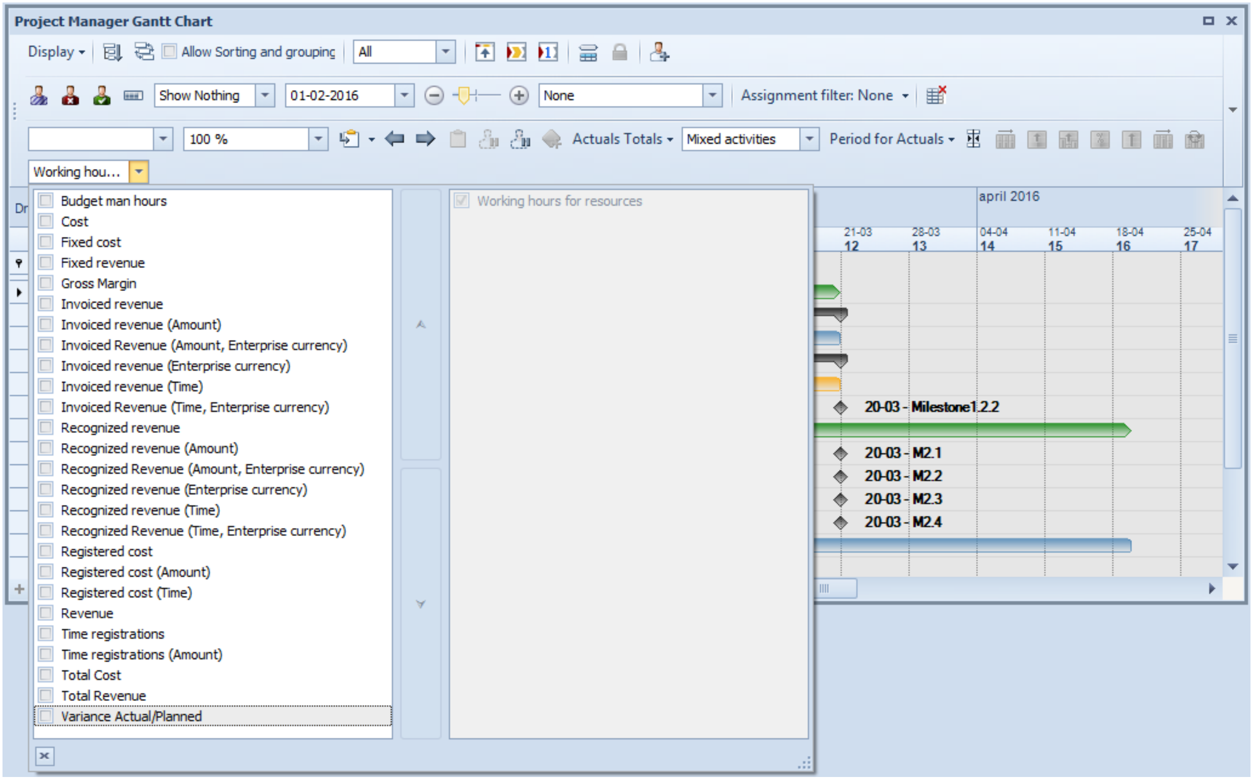
Time registrations are just one type of actuals. The import of actuals imports numbers from Maconomy into the following accounts in People Planner: The following table describes the supported actuals account.

Actuals Account	MaconomyWS Web Service	Maconomy RESTful Web Service
Invoiced Revenue (Amount)	Supported	Not supported
Invoiced Revenue (Amount, Enterprise Currency)	Supported	Not supported
Invoiced Revenue (Time)	Supported	Not supported
Invoiced Revenue (Time, Enterprise Currency)	Supported	Not supported
Recognized Revenue (Amount)	Supported	Not supported
Recognized Revenue (Amount, Enterprise Currency)	Supported	Not supported
Recognized Revenue (Time)	Supported	Not supported
Recognized Revenue (Time, Enterprise Currency)	Supported	Not supported
Registered Cost (Amount)	Supported	Supported
Registered Cost (Time)	Supported	Not supported
Time Registrations	Supported	Supported
Time Registrations (Amount)	Supported	Not supported

Note: When you import actuals using MaconomyWS Web Service, and you change the setting to use Maconomy RESTful Web Service, all of the non-supported actuals accounts on Maconomy RESTful Web Service are deleted on first import.

Conflicts during Import

To see the individual numbers in People Planner you must add the accounts. The following figure shows this in the Project Manager Gantt chart.



Some of the accounts come in triples, for example:

- Recognized Revenue (Amount, Enterprise Currency)
- Recognized Revenue (Time, Enterprise Currency)
- Recognized Revenue (Enterprise Currency)

In these cases, the third account is the calculation of the sum of the other two accounts:

$$\begin{aligned} &Recognized\ Revenue\ (Enterprise\ Currency) \\ &\qquad = Recognized\ Revenue\ (Amount, Enterprise\ Currency) \\ &\qquad + Recognized\ Revenue\ (Time, Enterprise\ Currency) \end{aligned}$$

The summary account is not imported as a separate account.

Mapping Actuals to People Planner Projects

When People Planner requests Actuals (for example, time registrations), Maconomy maps the values to a project, task, and resource. In addition to the values, the data that is returned from Maconomy includes the following:

- EventID (FirstInstanceKey)
- ResourceID (EmployeeNumber)
- JobId (JobNumber)

For example, if a designer named Emma has registered 40 hours on the Tower Bridge project, and there is no budget line for Emma on that project, but there is a general budget line for Designers, Maconomy maps Emma’s work to that budget line. However, if later a specific budget line is added to the Tower Bridge project for Emma, a subsequent import of actuals will map Emma's work to that new budget line, because that would be a better match.

When People Planner receives the values from Maconomy, the following rules apply:

- If the EventID exists in People Planner—for example, from a previous project import—the actuals are added to an assignment between this event and the resource specified by the ResourceID.
- If the EventId does not exist in People Planner (or is empty), the actuals are added to an assignment between the project specified by JobId and the resource specified by the ResourceId.
- If the ProjectId does not exist in People Planner—for example, no project import has been executed
  - Import of actuals using MaconomyWS Web Service: the actuals are added to an assignment between the resource specified by the ResourceID and the general "project for actuals" that is automatically created.
  - Import of actuals using Maconomy RESTful Web Service: the actuals are ignored and not imported to People Planner.

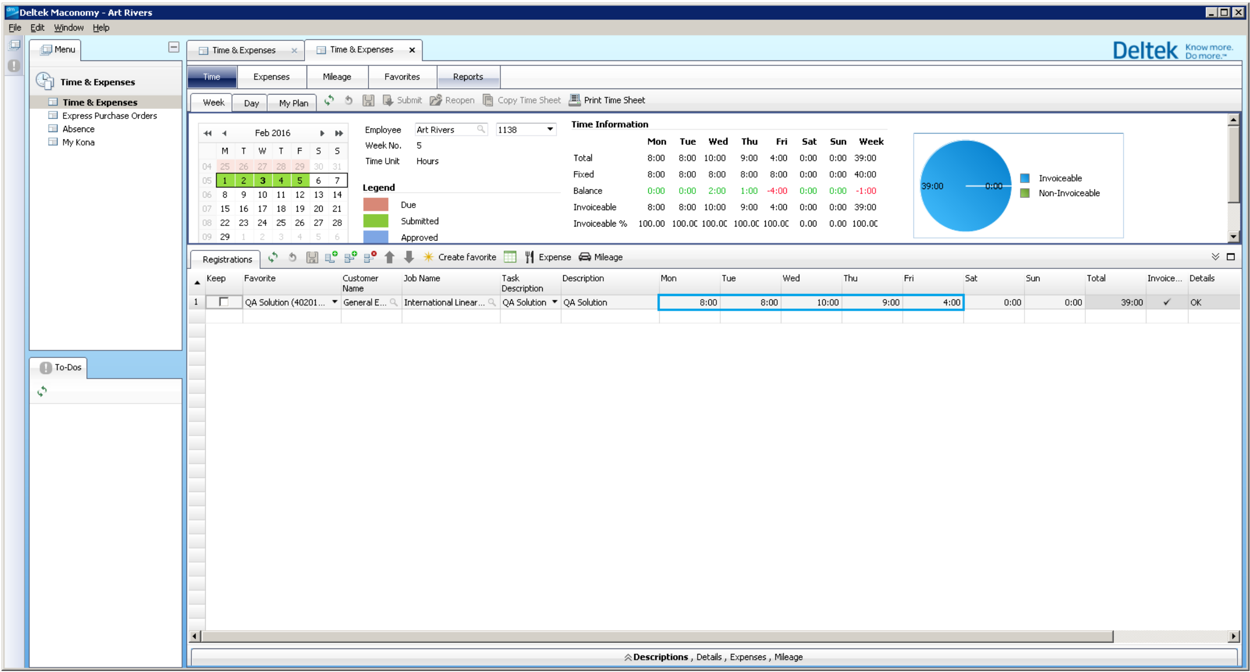
In the preceding list, if the specified assignment does not exist, it is automatically created, and if the ResourceID does not match a resource in People Planner—for example, no master data import has been executed since the resource was added to Maconomy—the general resource "resource for actuals" is used. For detailed examples see Conflicts during Import.

> **Note:** When importing actuals, all previously imported actuals for the same period are deleted; however, assignments previously created automatically (see the preceding description) by the import **are not deleted**.

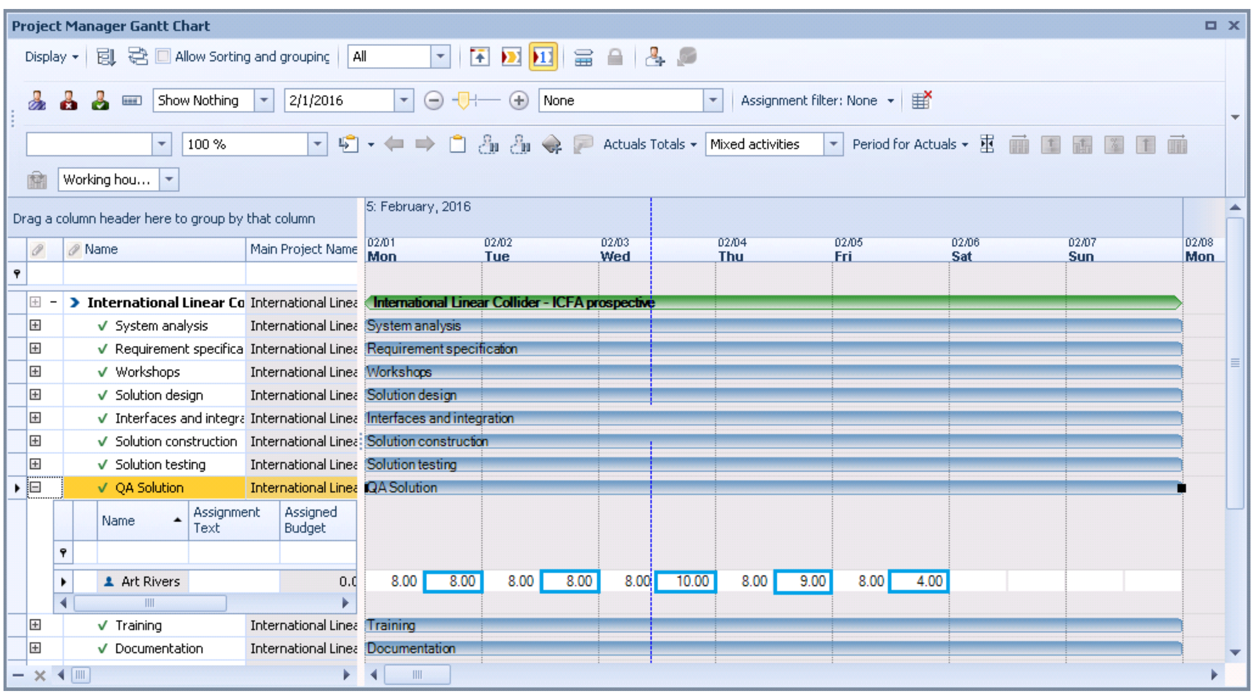
Conflicts during Import

When actuals are imported, People Planner tries to match them with where they have been registered.

In the following example, Art Rivers has registered hours on the QE Solution budget line on the job International Linear Collider – ICFA prospective.



The actuals are not imported into People Planner until both the Project Manager and Art Rivers' Resource Manager have approved[11] them. The following figure shows the PG with two accounts added, Working hours for resources (that is, the booked hours) and Time registrations. Art Rivers' time registrations are imported in the latter.



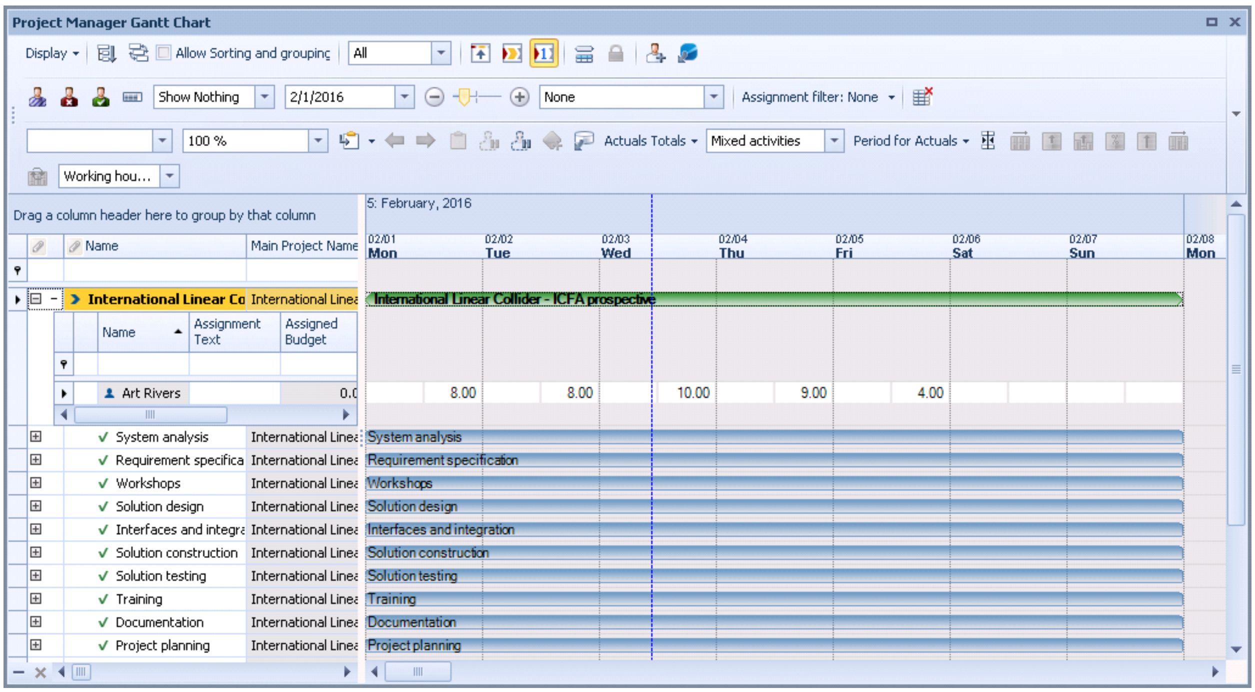
[11] The actual then also need to be posted, but Maconomy can be configured to post any approved actuals automatically, and will probably have been so. If not, this must be done manually.

In Maconomy, the actuals are associated with one of the budget lines. The budget lines are imported into People Planner as tasks. Normally the actuals are imported on these tasks, but sometimes this is not possible.

Conflict #1: The budget line was not imported into People Planner. This can happen if:

- A different budget has been imported (see Budget Types).
- The budget line has been added in Maconomy, but the job has not been reimported into People Planner.

In either case, People Planner adds the actuals directly on the project. In the following figure, the QA Solution task is missing, and therefore the time registrations are imported on the project level instead. If the resource is not already assigned directly on the project (not usually the case for a job imported from Maconomy) it is assigned.



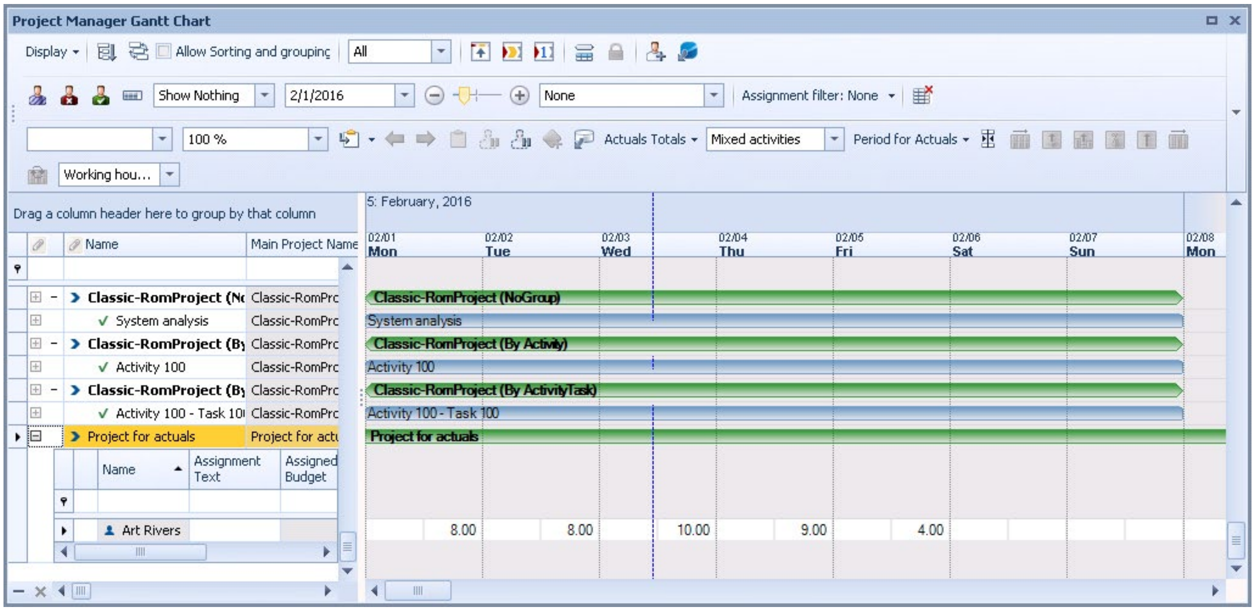
Resolution

When the budgetline has been imported, and the Import of Actuals has run again, the actuals are placed at the correct budgetline.

Conflict #2a: The job has not been imported into People Planner.

Variant a: The Actuals-import is using MaconomyWS Web Service, and the **Use Project For Actuals** checkbox is selected in the Admin Tool.

In this case, it is not even possible to place the hours directly in the project level. Instead, a special project is created, Project for actuals, and the actuals are placed there.



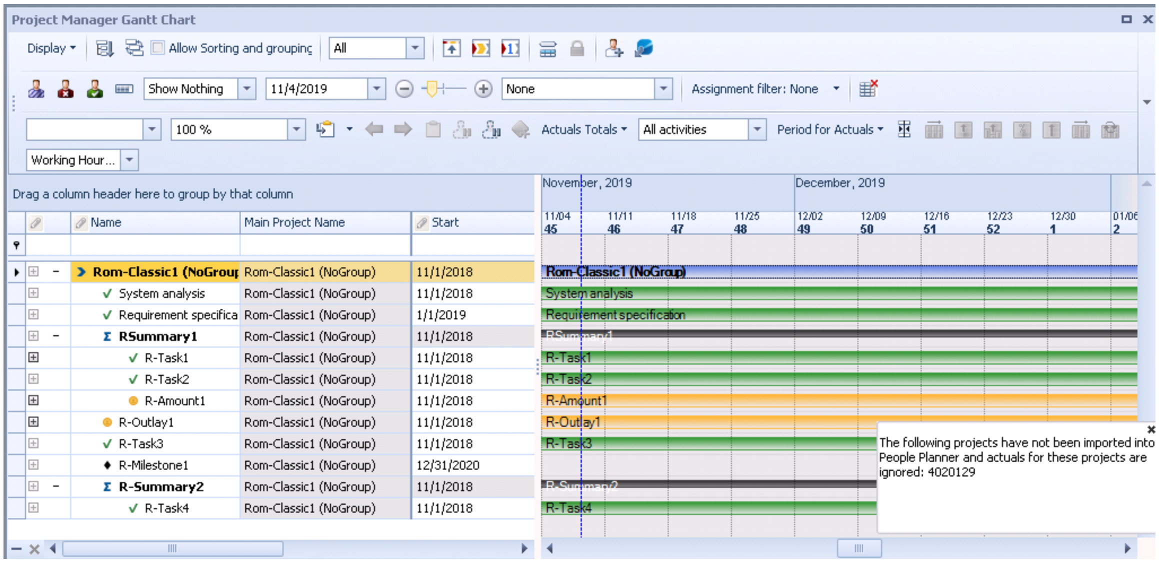
Resolution

When the job has been imported, and the Import of Actuals has run again using MaconomyWS Web Service, the actuals are placed at the correct job.

When Project for Actuals exists and the job is still not imported into People Planner, and Import of Actuals runs again using Maconomy RESTful Web Service, all actuals from “Project for Actuals” are deleted and the actuals are not imported into People Planner.

When the **Use Project for Actuals** checkbox is not selected:

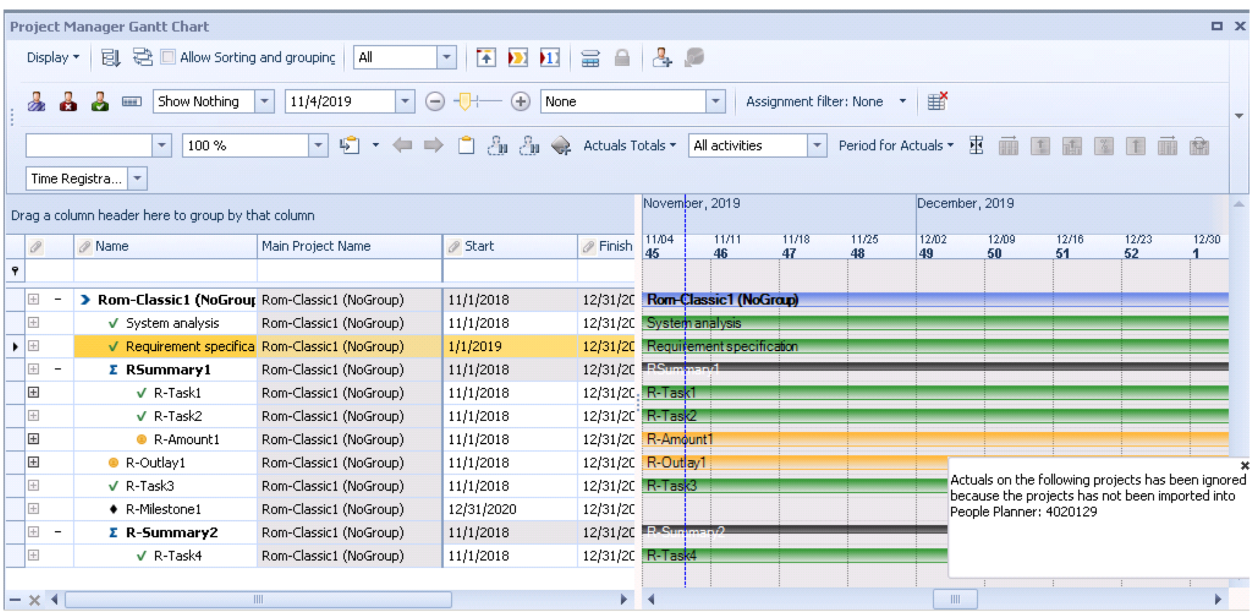
In this case, the actuals are ignored and not imported into People Planner. A notification message is displayed that includes the list of jobs that do not exist in People Planner that have actuals to be imported.



Conflict #2b: The job has not been imported into People Planner

Variant b: Import actuals uses Maconomy RESTful Web Service

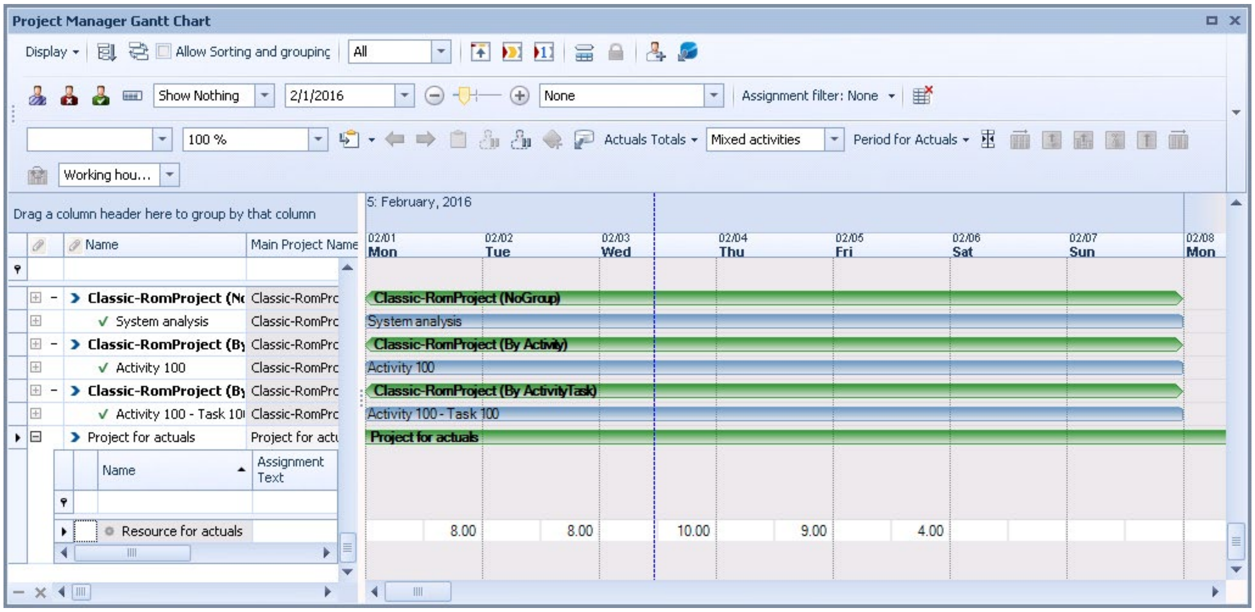
In this case, the actuals are ignored and not imported into People Planner. A notification message is displayed that includes the list of jobs that do not exist in People Planner that have actuals to be imported. "Project for Actuals" is not supported on Maconomy RESTful Web Service.



Conflict #3: The resource does not exist in People Planner.

People Planner imports actuals even if the resource does not exist in People Planner. This can happen if the Master Data import has not imported the resource yet.

In this case, a special resource, Resource for actuals, is created, and the actuals are placed there.



When the resource has been imported, and the Import of Actuals has run again, the actuals are placed at the correct location.

Import Actuals using a Task

You can import actuals by creating a Task Specification. See Tasks for more information about Task Specifications and scheduled tasks.

Warning: Edits in the I files can override the settings covered in the following subsections.

For example, if you do not want to import Amount Actuals, and you have deselected the Include Amount for Actual Updates checkbox, the import might actually perform better if the Amount Actuals were filtered away already in the I file instead.

Thus, if a setting does not do what you expect it to do, this might be caused by some code in the I file that is countering it.

People Planner provides two Task Specifications to supports the import of actuals:

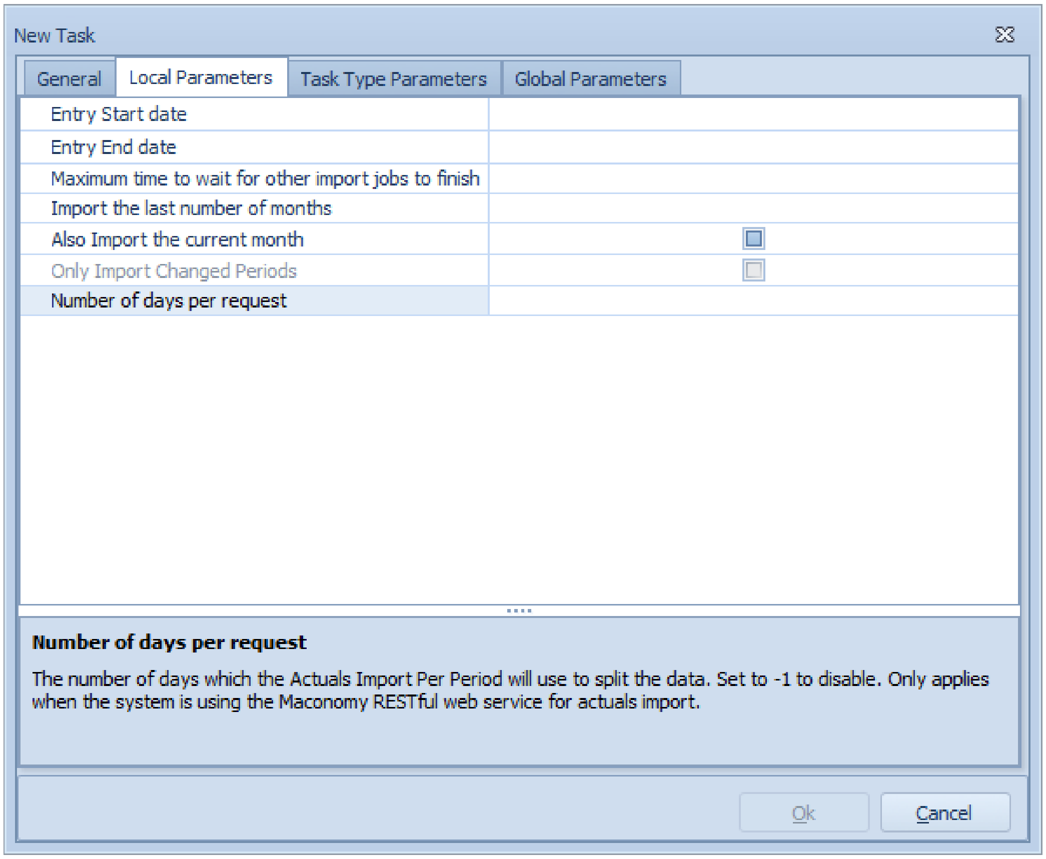
- Import Actuals from Maconomy
- Import Incremental Actuals from Maconomy

You can choose to import all actuals for a project, actuals for a specified period, or do an incremental import. When running an incremental import, the integration takes only actuals that were changed or added since the last incremental import.

To run an incremental import, create a task specification using the **Import Incremental Actuals from Maconomy** task type. For more information about this, refer to Create a Task Specification.

Local Parameters

When setting up the Task Specification, your primary concern is defining the period for which the actuals should be imported. The settings for this are located under Local Parameters.

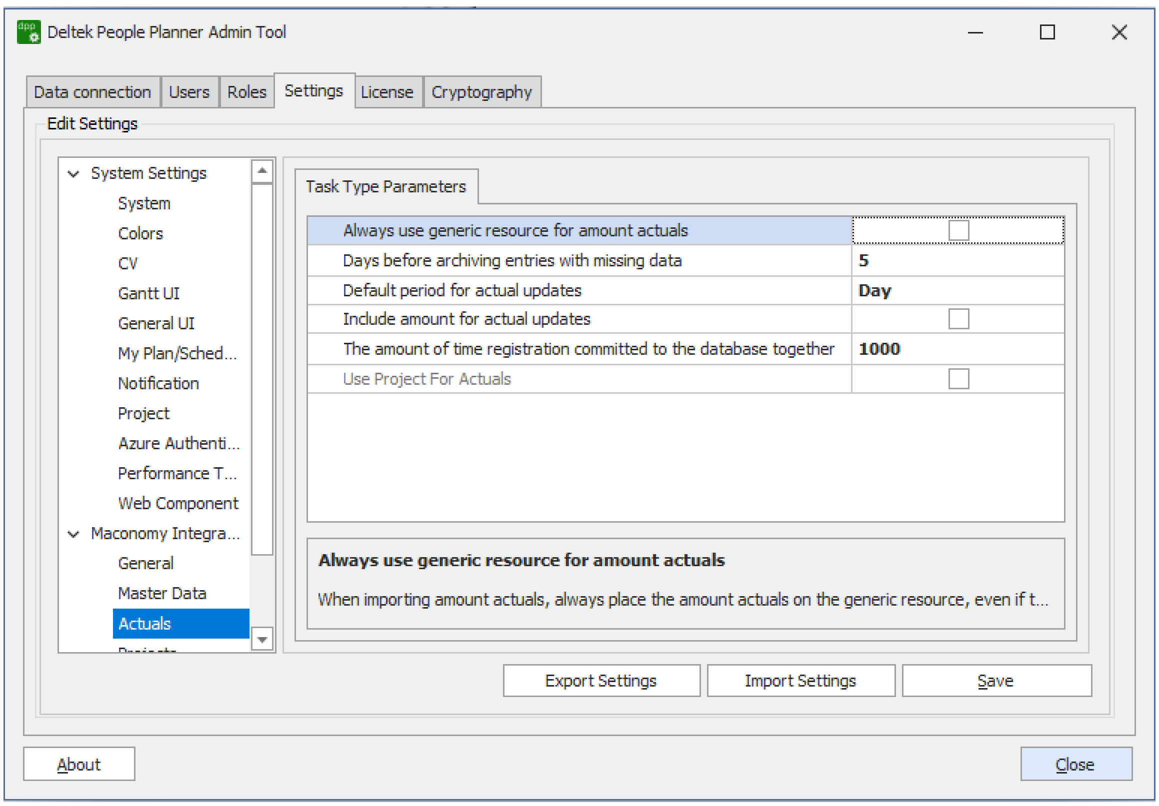


Setting	Description
Maximum time to wait for other import jobs to finish	
Entry Start date	Use the Start date and End date if you want to import the time registrations from a specific period These settings are for special situations, and a normal setup would be to use the two months settings instead to define a time span that is automatically updated as time evolves.
Entry End date	
Import the last number of months	▪ The **Import the last number of months** setting determines how many months back into the past should be imported. The current month is not included in this. ▪ Select the Also import the current month checkbox if you also want to include time registrations from the current month.
Also import the current month	

Setting	Description
Last Import transaction timestamp overlap	Specify how many hours should overlap from the previous incremental import.
Last Import transaction timestamp	This setting shows the date and time of the previous incremental import. It is automatically updated when running the incremental import. You only need to set this when a new incremental task specification is created. The data and time in this setting refers to the Maconomy transaction timestamp.

Type Parameters

There are also a few Type Parameters to consider. You can only edit these from the People Planner Admin Tool.

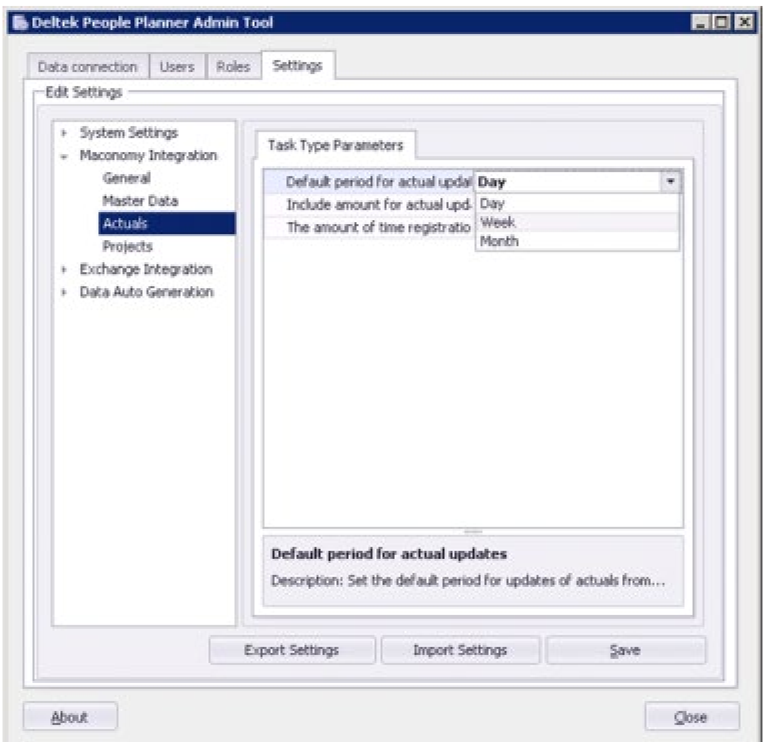


Setting	Description
Always use generic resource for amount actuals	If this checkbox is selected: When importing amount actuals, always place the amount actuals on the generic resource, even if the employee/resource exists in People Planner.
Days before archiving entries with missing data	Set the number of days from which records from the **ActualsRegistrationEntryForUpdate** table should be transferred to the **ActualsRegistrationEntryForUpdateArchive** table.
Default period of actual updates	This is the granularity of the imported actuals. See the following. **Note:** You cannot change the granularity changed for different task specifications, therefore it is a bit misleading to call it the "default …"
Include amount for actual updates	If this checkbox is selected, both the Time and Amount variants of the Actuals accounts are imported (see Actuals Accounts). If the checkbox is not selected, only the Time variants of the Actuals accounts are imported.
The amount of time registration committed to the database together	To optimize the import, People Planner imports the actuals in batches, and processes them before moving on to the next batch. This setting determines the size of a batch, and the default is to treat 1000 actuals at a time.
Use Project for Actuals	When a job that has actuals has not been imported into People Planner: If this checkbox is selected, a special project is created, Project for Actuals, and the actuals are placed there. If this checkbox is not selected, the actuals are ignored and not imported into People Planner. This parameter is only enabled when import actuals uses MaconomyWS Web Service.

You can import actuals with three possible granularities.

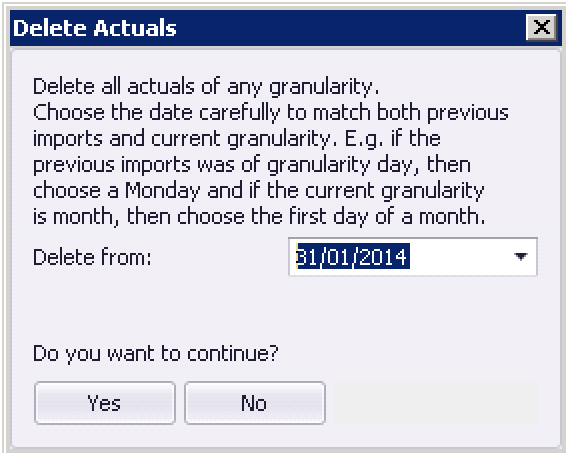
Granularity	Description
Day	Each time registration in Maconomy is stored as a single entry in the People Planner database. This gives the most accurate resolution, but it can tax the People Planner database.
Week	All of the time registrations within each week are summed together and are stored in the People Planner database as a single entry.
Month	All of the time registrations within each month are summed together and are stored in the People Planner database as a single entry. This gives the least accurate resolution, but saves space in the database.

You can edit the granularity in the Admin Tool.



If you do this, and there are already some actuals in the database, People Planner must do a general cleanup to avoid overlapping actuals when it imports them the next time that it is set to import actuals—now with the new granularity.

There is no need to delete old actuals if you do not plan to reimport actuals from that far back anyway, and the Admin Tool therefore asks you how far back to delete.



Import Actuals using the Ribbon

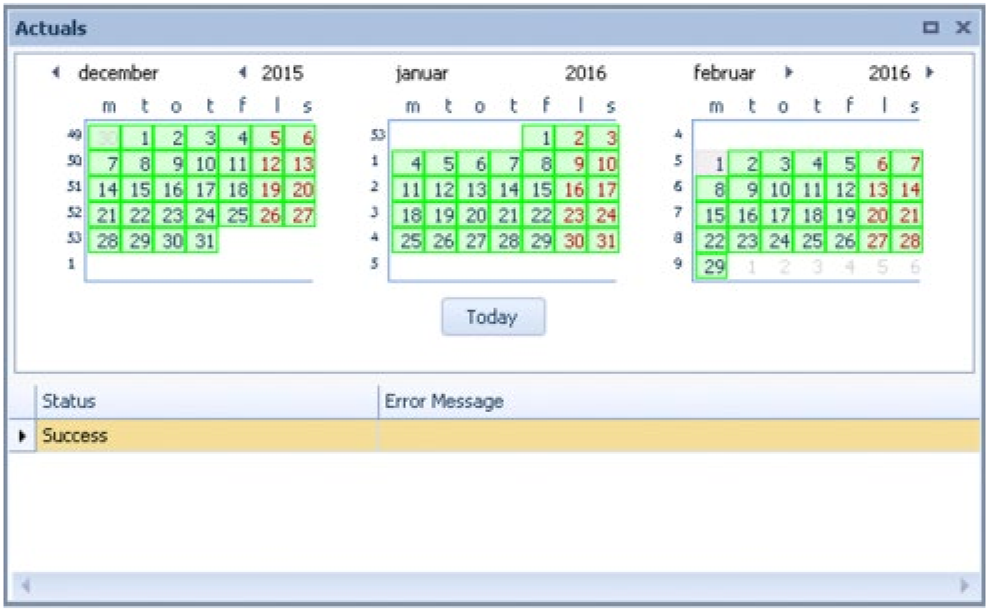
You can also import actuals directly from the Ribbon.

When you import actuals in this way, People Planner creates a System Task Specification and runs that. See System Task Specification.

Data-Centric View for Importing Actuals

The data-centric view for Actuals Import summarizes which actuals have been imported and whether there were any problems.

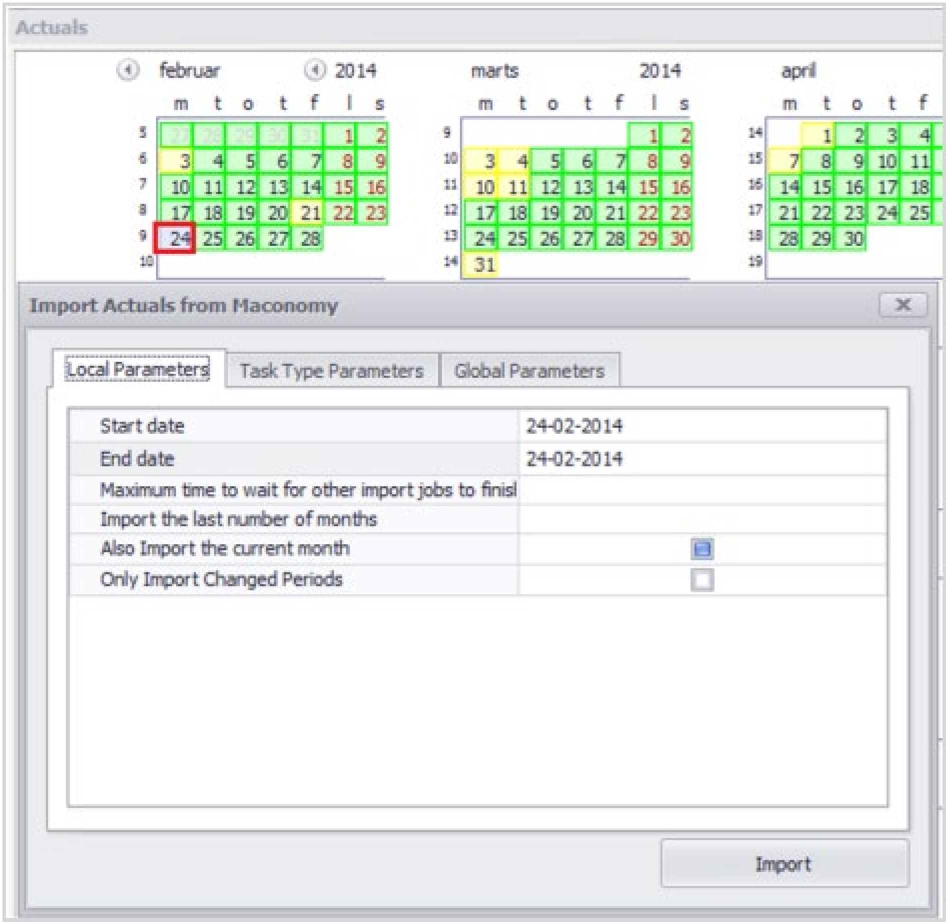
This view is located at **Views » Tasks » Import Results » Actuals**.



You can combine the data-centric view with the execution log views in much the same way as for scheduled tasks.

Re-Import Actuals via Double-Click

You can re-import actuals for a period by double-clicking on an entry in the calendar, as shown in the following figure.



Export ETCs to Maconomy

Estimated Time to Complete (ETC) is an estimate for how long a given project will take to complete.

As opposed to the other integrations that are described in this section, this integration is not based on Task Specifications, and as a consequence it cannot be automated.

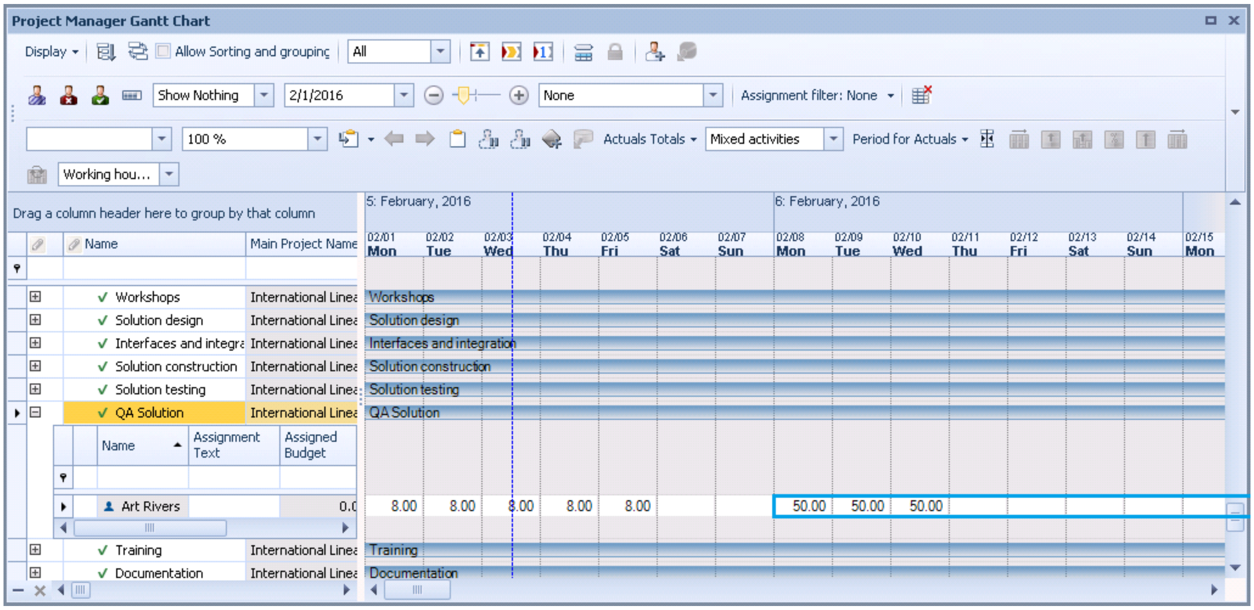
The ETC is imported into Maconomy, but it is based on planning in People Planner; for example, if there are 150 hours planned on the project in People Planner, the ETC is 150 hours. The ETCs are calculated based on a cut-off date that you specify; bookings before this date are not included in the ETC.

To import ETCs into the Maconomy Workspace Client from People Planner:

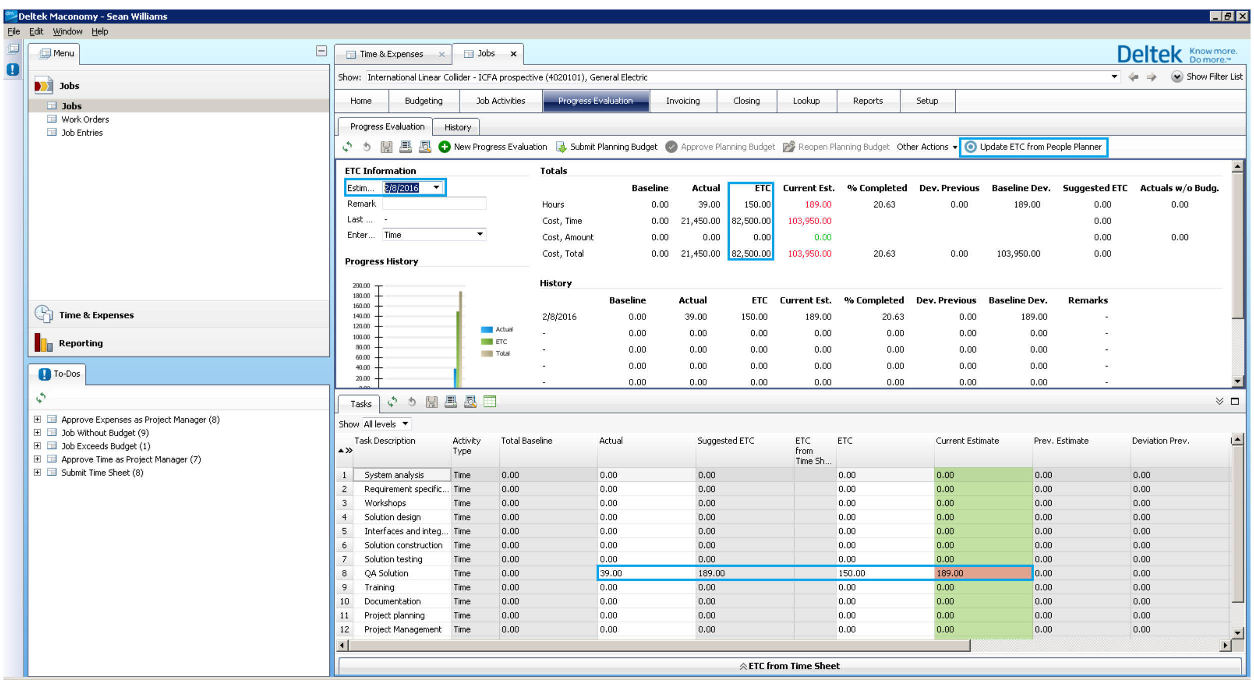
1. Navigate to a job/project/engagement.
2. Open the **Progress Evaluation** tab.
3. Open the **Progress Evaluation** sub-tab.
4. Select an **Estimate Date**—this is the cut-off date.
5. Click the **Update ETC from People Planner** button.

The Maconomy Coupling Service then calls the People Planner API to get the ETCs from People Planner.

In the following example, the selected cut-off date is 02/08. There are 150 hours planned on the project after this date. For ease of demonstration, they are all booked on the same resource.



This is then imported into Maconomy.



There are two ETC columns, one at the top summing up of all budget lines, and one at the bottom indicating the values for the individual tasks.

- The ETC is the 150 hours.
- The ETCs are added with the time registrations from before the cut-off date to form the Current Estimate.

Troubleshooting the Import of ETCs from Maconomy

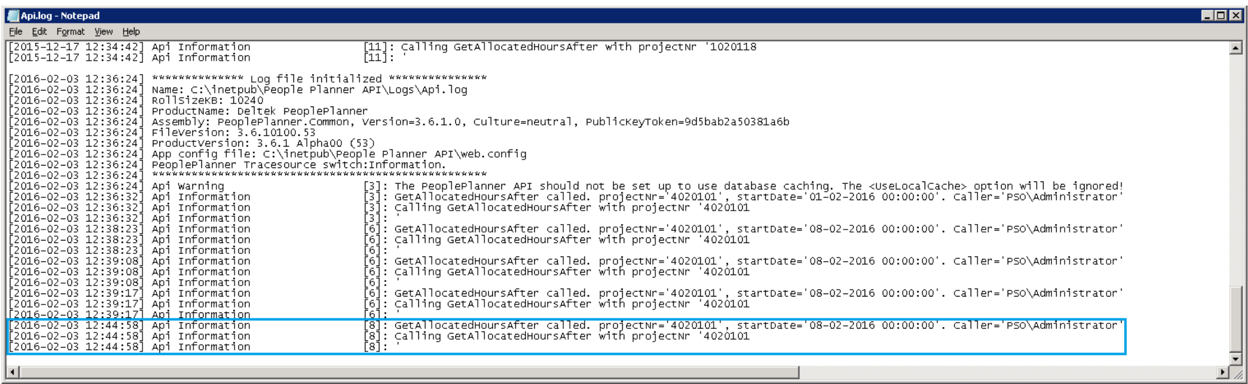
The Import of ETCs uses the People Planner API web service. If there are any problems, this is where you should start troubleshooting.

- Investigate whether the People Planner API has been installed correctly; for example, is the DataConnection.xml file correct?
- Investigate whether the People Planner API URL has been configured correctly in the WSC.
- Investigate the IIS log. Is the People Planner API being called when you click the **Update ETC from People Planner** button?
- Investigate the log file for the People Planner API.

The People Planner API logs everything to its own log file. This log file is located in the installation directory for the People Planner Windows application, under Logs:

`C:\inetpub\People Planner API\Logs`

The log contains other information in addition to the calls to get the ETCs. What you should look for is calls to the GetAllocatedHoursAfter method.



```
Api.log - Notepad
File Edit Format View Help
[2015-12-17 12:34:42] Api Information            [11]: Calling GetAllocatedHoursAfter with projectNr '1020118
[2015-12-17 12:34:42] Api Information            [11]: '

[2016-02-03 12:36:24] *************** Log file initialized ****************
[2016-02-03 12:36:24] Name: C:\inetpub\People Planner API\Logs\Api.log
[2016-02-03 12:36:24] RollSizeKB: 10240
[2016-02-03 12:36:24] ProductName: Deltek PeoplePlanner
[2016-02-03 12:36:24] Assembly: PeoplePlanner.Common, Version=3.6.1.0, Culture=neutral, PublicKeyToken=9d5bab2a50381a6b
[2016-02-03 12:36:24] FileVersion: 3.6.10100.53
[2016-02-03 12:36:24] ProductVersion: 3.6.1 Alpha00 (53)
[2016-02-03 12:36:24] App config file: C:\inetpub\People Planner API\web.config
[2016-02-03 12:36:24] PeoplePlanner Tracesource switch:Information.
[2016-02-03 12:36:24] ****************************************************
[2016-02-03 12:36:24] Api Warning                [3]: The PeoplePlanner API should not be set up to use database caching. The <UseLocalCache> option will be ignored!
[2016-02-03 12:36:32] Api Information            [3]: GetAllocatedHoursAfter called. projectNr='4020101', startDate='01-02-2016 00:00:00'. Caller='PSO\Administrator'
[2016-02-03 12:36:32] Api Information            [3]: Calling GetAllocatedHoursAfter with projectNr '4020101
[2016-02-03 12:36:32] Api Information            [3]: '
[2016-02-03 12:38:23] Api Information            [6]: GetAllocatedHoursAfter called. projectNr='4020101', startDate='08-02-2016 00:00:00'. Caller='PSO\Administrator'
[2016-02-03 12:38:23] Api Information            [6]: Calling GetAllocatedHoursAfter with projectNr '4020101
[2016-02-03 12:38:23] Api Information            [6]: '
[2016-02-03 12:39:08] Api Information            [6]: GetAllocatedHoursAfter called. projectNr='4020101', startDate='08-02-2016 00:00:00'. Caller='PSO\Administrator'
[2016-02-03 12:39:08] Api Information            [6]: Calling GetAllocatedHoursAfter with projectNr '4020101
[2016-02-03 12:39:08] Api Information            [6]: '
[2016-02-03 12:39:17] Api Information            [6]: GetAllocatedHoursAfter called. projectNr='4020101', startDate='08-02-2016 00:00:00'. Caller='PSO\Administrator'
[2016-02-03 12:39:17] Api Information            [6]: Calling GetAllocatedHoursAfter with projectNr '4020101
[2016-02-03 12:39:17] Api Information            [6]: '
[2016-02-03 12:44:58] Api Information            [8]: GetAllocatedHoursAfter called. projectNr='4020101', startDate='08-02-2016 00:00:00'. Caller='PSO\Administrator'
[2016-02-03 12:44:58] Api Information            [8]: Calling GetAllocatedHoursAfter with projectNr '4020101
[2016-02-03 12:44:58] Api Information            [8]: '
```

You can set the logging level of the People Planner API to get more information. See Set the Logging Level for a description of this. If you do this, you should remember to set the loggingLevel back to Information after you have finished troubleshooting the problem. If you do not do this, the log files will grow to be very large.

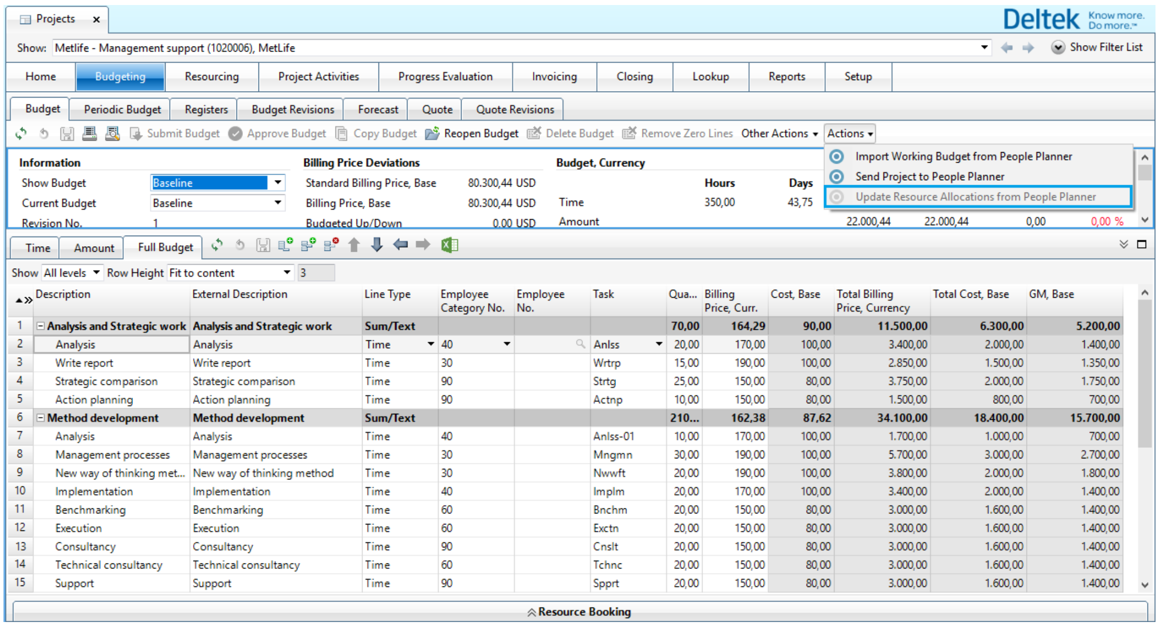
Export Resource Allocations to Maconomy

A Periodic Job Budget is a budget that is divided into months. The numbers for each month need not be the same.

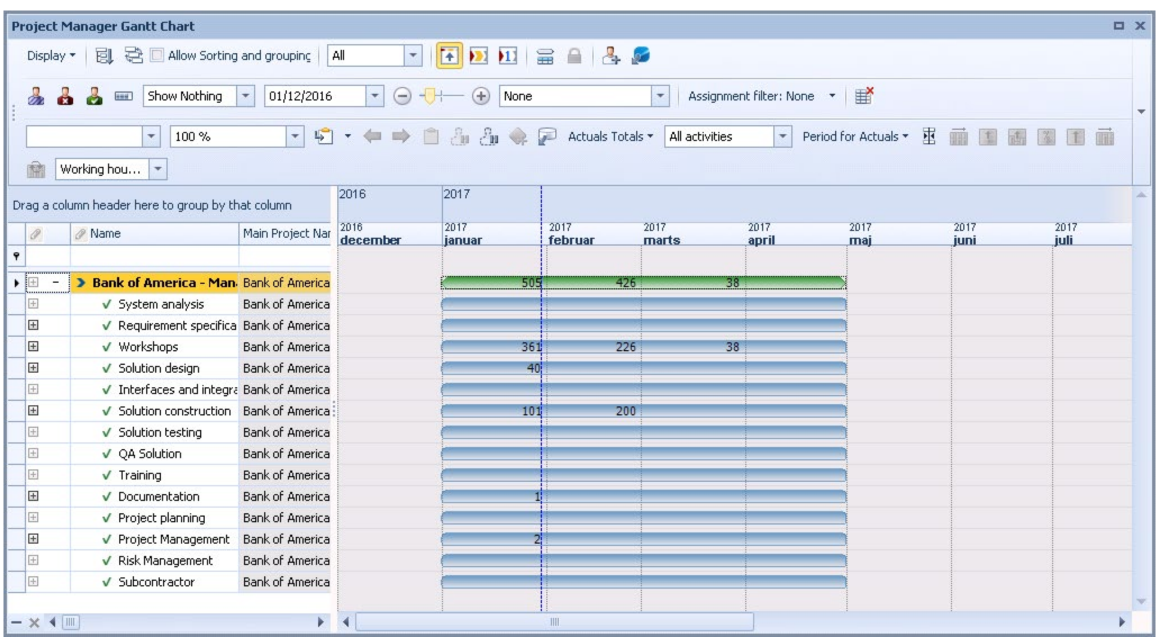
You can import the Resource Allocations from People Planner by using the **Update Resource Allocations from People Planner** button.

To update Resource Allocations from People Planner:

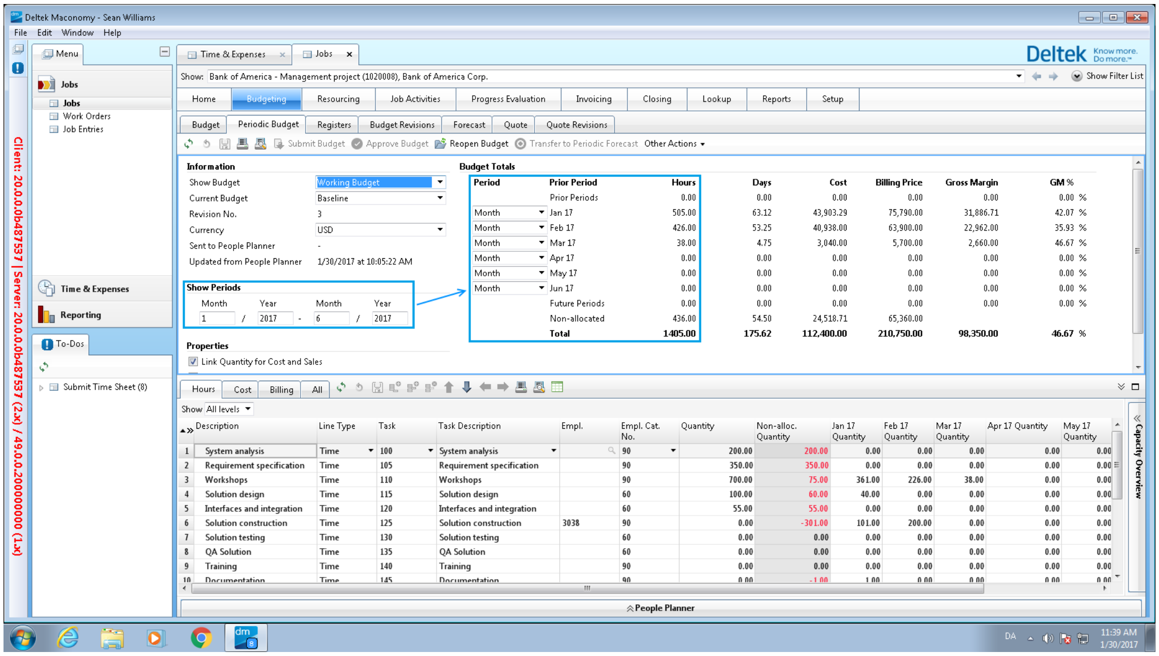
1. Open the WSC.
2. Open the Jobs workspace.
3. Select the job by double-clicking it in the Job List.
4. Click the **Budgeting** tab, and then click the **Periodic Budget** sub-tab.
5. Click the **Other Actions** menu and choose **Update Resource Allocations from People Planner**.



The import runs. The result is based on the bookings in People Planner.



These are imported and summed on a monthly basis and displayed in the Hours column. The columns Days, Cost, Billing Price, Gross Margin, and Gross Margin % are based on the numbers in the Hours column; for example, days are calculated as 8 hours to a day. This is configurable in Maconomy.



You can use Show Period to determine which months you want to see. If there are bookings before or after the selected period, these are summed under **Prior Periods** and **Future Periods**, respectively.

The non-allocated hours are the hours from the full budget that have not yet been booked.

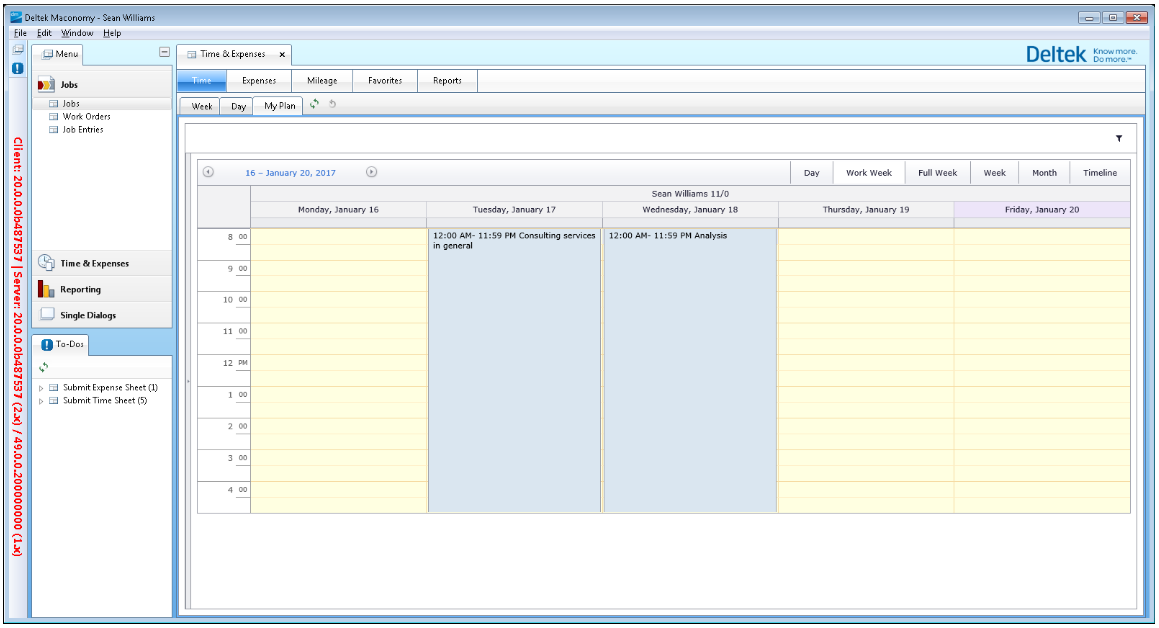
People Planner Embedded in the Maconomy Workspace Client

Both the MyPlan and the People Planner Web Components (the Components) are described in detail in the *Deltek People Planner Web Components Guide*. They are only covered briefly here for completeness.

When you log in to the Maconomy Workspace Client (WSC), you select a user role. The embedded People Planner components are only shown if you log in as the role that is selected as Use for People Planner. See Basics of Master Data Import for details.

MyPlan

There is not much interaction between MyPlan and the Maconomy Workspace client. The WSC embeds the MyPlan web application, but that is the extent of the interaction.



MyPlan installs the following web sites:

- MyPlan
- MyPlanWSC

MyPlanPortal

> **Note:** The MyPlanWSC web site is intended to be embedded in the WSC. If the Maconomy installation was configured for an older version of People Planner, it still points to the MyPlan web site; you must therefore reconfigure it to use the new web site. See People Planner MyPlan.

People Planner Web Components

The People Planner Web Component is specifically designed to be embedded in the Maconomy Workspace Client (WSC).

> **Note:** Although you can start the People Planner Web Components (the Component) directly in a browser, you cannot use it from a browser.

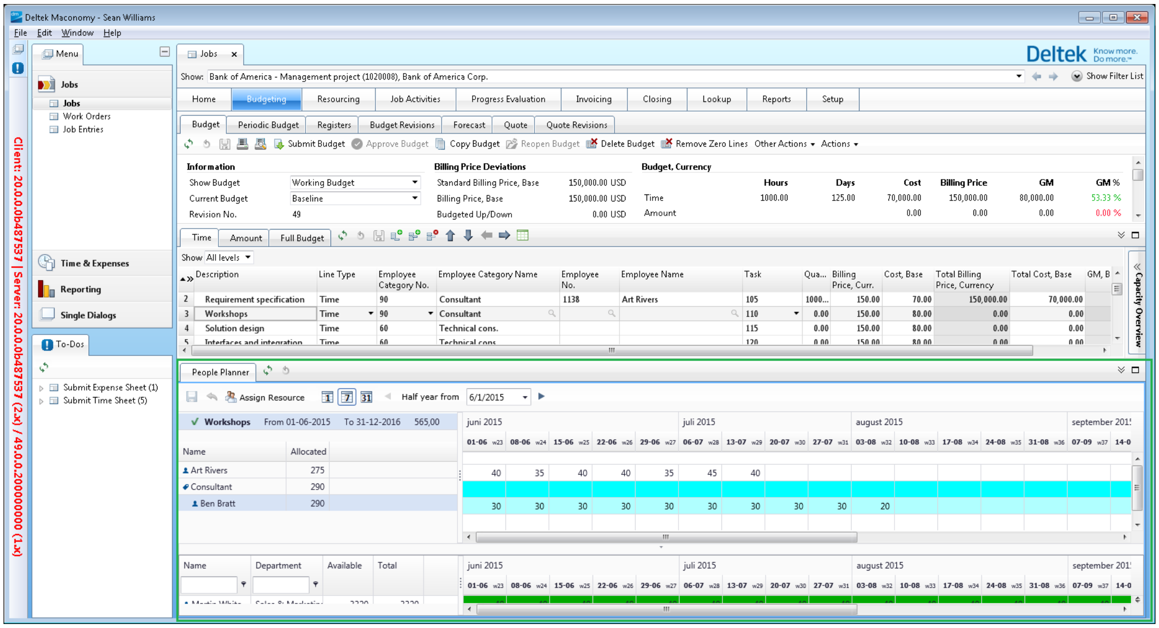
You can embed the Component in several different places in the Maconomy WSC:

- Budgeting Assistant
- Progress Evaluation Assistant
- Resourcing Overview
- Resource Management
- Resource Plans

Resource Management was introduced in People Planner 3.8. The the Resourcing Overview were introduced with People Planner 3.7 and expanded in 3.8. The Budgeting Assistant was introduced with People Planner 3.6, but was further expanded upon in People Planner 3.7 and 3.8.

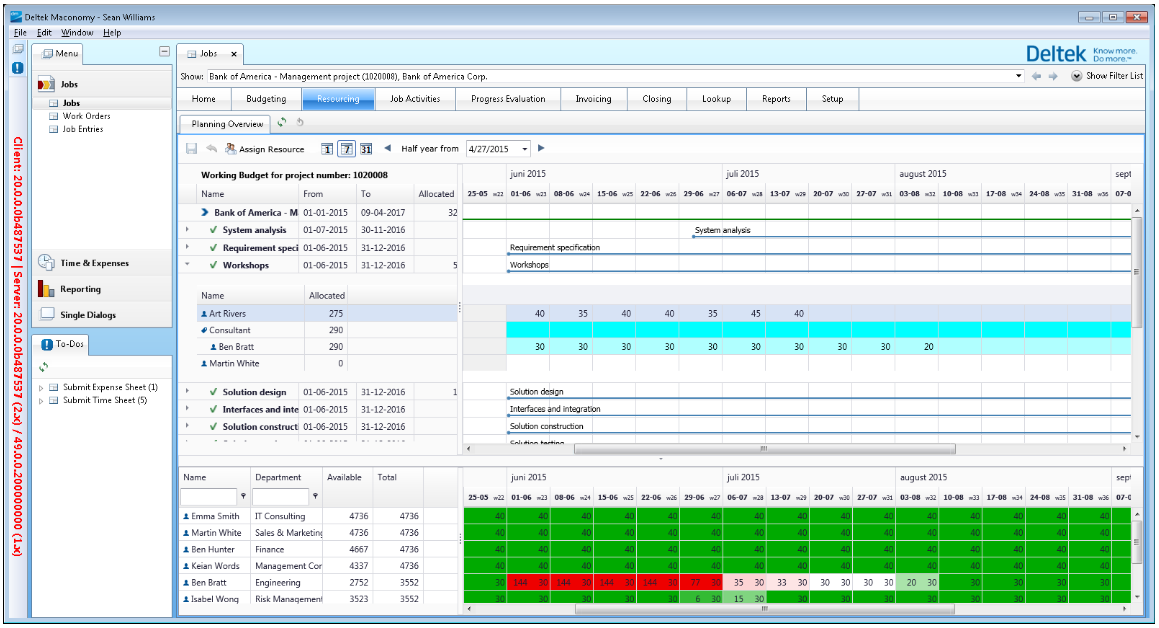
Tip: For a full description of the People Planner Web Components, see the *Deltek People Planner Web Components Guide*.

In Maconomy 2.4, the Web Component can be embedded in different locations; the following figure shows the **Budgeting Assistant** embedded in the Jobs workspace under the Budgeting tab.

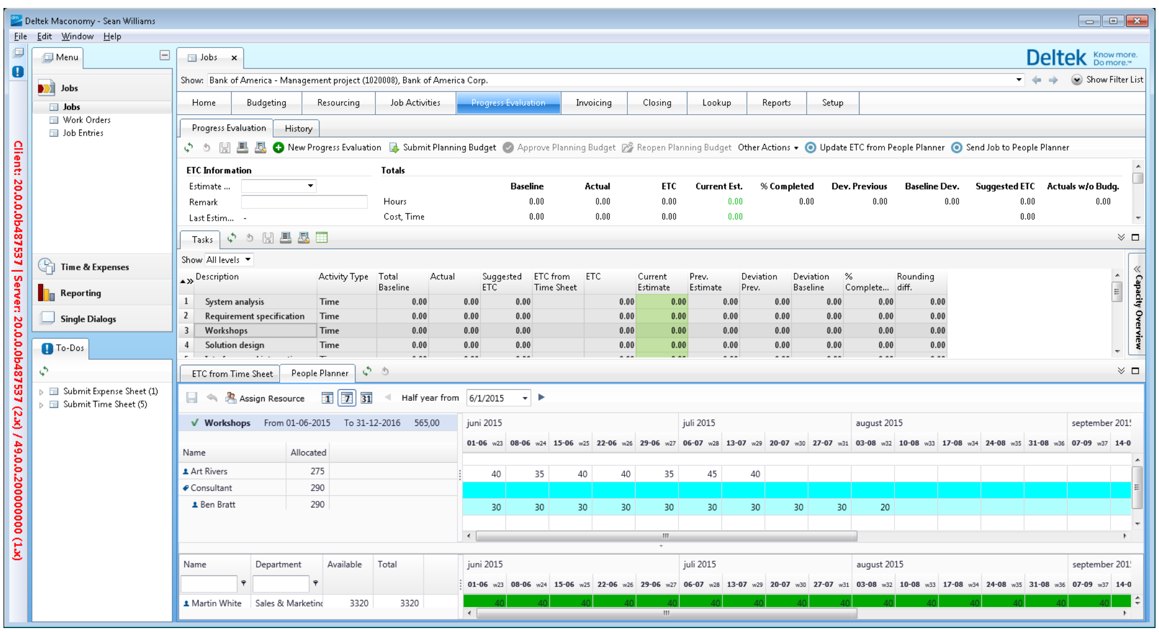


From the Budgeting Assistant, you can assign employees on tasks, and you can then allocate hours for them to work on those tasks.

The focus of the Budgeting Assistant is a single job, and from that, you can select a budget line and see the planning for this. In comparison, the **Resourcing Overview** shows the full job.



The **Progress Evaluation Assistant** is very similar to the Budgeting Assistant.



Workflow between the WSC and the People Planner Web Component

To use the People Planner Web Component, you must first make sure that the job has been sent from Maconomy to People Planner. You can wait for People Planner's scheduled import to do this, or you can force it by clicking the **Send Job to People Planner** button in the WSC.

When the job and its working budget have been sent to People Planner, they become accessible in the People Planner Web Component. From there you can:

- Assign a resource—that is, an employee—to a task.
- Assign a resource category—that is, an employee category—to a task.

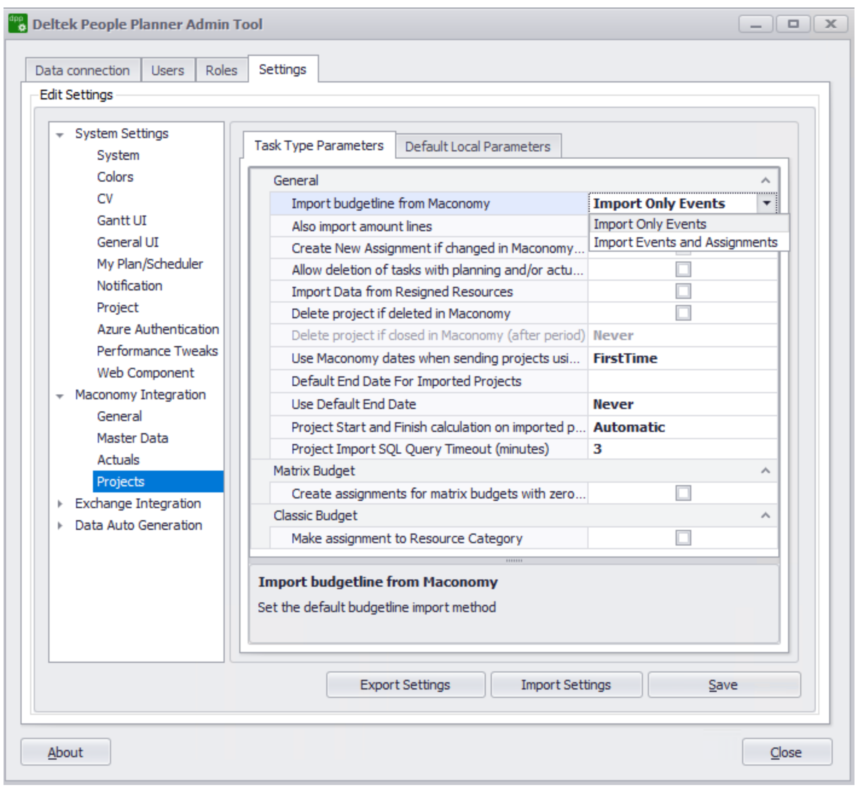
- Sub-assign a resource on a resource category assignment.
- Book a resource for hours on a task.

> **Note:** The **Send Job to People Planner** functionality also automatically transfers the customer and company for a project if they are marked mandatory in People Planner, and they have not already been imported to People Planner as part of a Master Data import.

Assignments

To configure People Planner to create assignments when it imports projects:

1. Load the **People Planner Admin Tool**.
2. Load the **DataConnection.xml file** and connect to the People Planner database.
3. Click on the **Settings** tab.
4. Navigate to **Maconomy Integration » Projects**.
5. Click on the **Task Type Parameters** tab.
6. Under General, choose **Import Events and Assignments** from the drop-down list for **Import budgetline from Maconomy**.



7. Click **Save**.

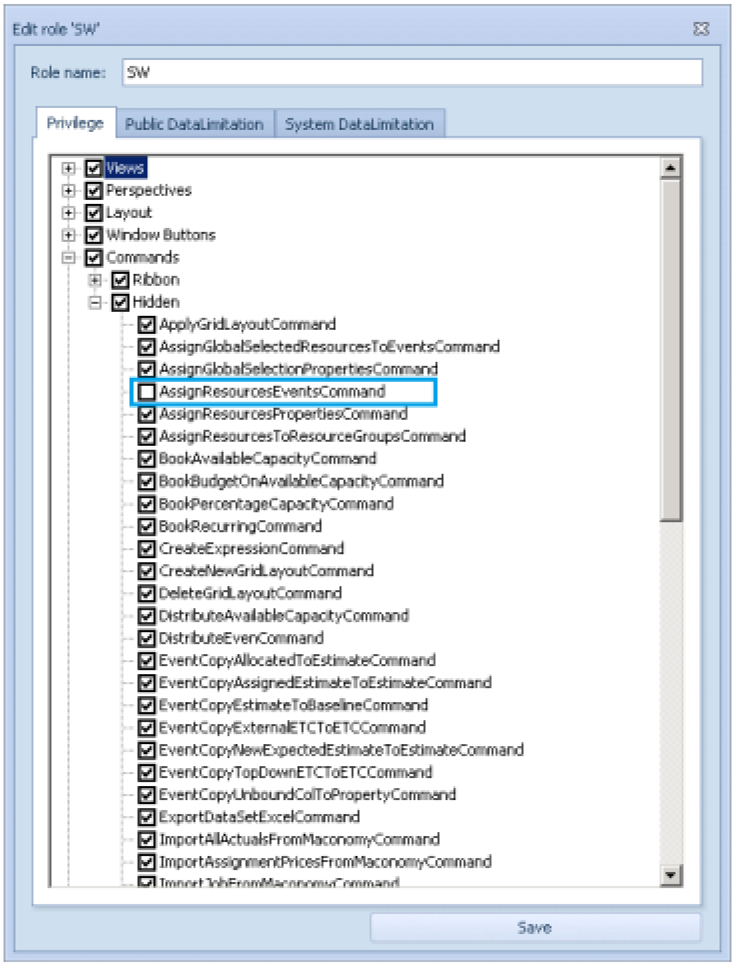
Bookings

Bookings do not have an equivalent in Maconomy; thus they can only be created through the People Planner Web Component or in MyPlan, or even in the People Planner application itself. Bookings are not controlled by the Enterprise Workflow setting, only assignments.

Creating the bookings can be considered to be doing the planning on how to use the budgeted hours. Conversely, you can update the budgets later based on how the bookings look. For this you can use the **Update ETC from People Planner** button. Beginning with Maconomy 2.4, you can also use the **Update Resource Allocations from People Planner** button.

Privileges

People Planner provides three privileges to control whether a user is allowed to perform certain actions from the People Planner Web Component. These privileges are controlled through the roles system in People Planner.



These privileges are described in the following table.

Privilege	Path	Description
Assign Resources	Commands » Hidden » AssignResourceEventsCommand	This privilege determines whether a user is allowed to assign resources on a task from the People Planner Web Component. If a user does not have this privilege, the Assign Resource button is not available.
Release Resource	Commands » Hidden » ReleaseResourceCommand	This privilege determines whether a user is allowed to remove a resource from a task. If a user does not have this

Privilege	Path	Description
		privilege, the Unassign Resource menu item is disabled.
Edit Bookings	Data Manipulation » ActionsFolder » Edit Working Hours for Resource Posts	This privilege determines whether a user is allowed to create, modify, or remove bookings in the People Planner Web Component. If a user does not have this privilege, all of the booking cells are disabled. The Book Recurring button is likewise disabled.

The People Planner Web Component is not the WSC

Although the People Planner Web Component is embedded in the WSC, it is important to understand that they are two different applications with separate databases. This means that the Assistants may not always be in sync with the WSC.

- The web components are shown in the WSC, even if the job has not been sent to People Planner. The web components will not show anything.
- The Budgeting Assistant does not show anything if you have selected a different budget than the one that was sent to People Planner.
- The web components cannot show budget lines that have been added since the job was last updated in People Planner.
- The web components cannot show tasks that exist only in People Planner.

For tasks that are shown in the People Planner Assistants, you can do the following:

- You can assign resources on the task. The Assistants list all resources, including those that only exist in People Planner.
- You can assign resource categories on the task.
- You can sub-assign resources on a resource category. In Maconomy, there are some restrictions on which employees can be combined with which employee categories; this restriction does not exist in the Assistants.
- You can create bookings on the resources, but not on the resource categories.

Import Start and Finish Times

One of the purposes of the People Planner Web Component is to avoid having to open the People Planner Windows application unless needed for very special functionalities.

There might not have been a huge praxis to have start and finish times on the jobs and budget lines in Maconomy, but unless you want to start the People Planner Windows application simply to maintain these for the project and its tasks, you should—and the integration should be configured to import these. If you do not do this, the imported projects end up having a default duration of one week, and they would not be usable for doing any planning.

To maintain the times in Maconomy:

- There should be start and finish times in the job.
- There should be start and finish times on the individual budget lines.

In addition, the Project Import task should be configured to always import the Maconomy dates.

With this, you can change the start and finish times on the budget line, and the next time that the Project Import runs, the start and finish times are updated in the People Planner Web Component.

See Start and Finish Times for more details on how start and finish dates are imported into People Planner.

Import Assignments

The **Import Budgetline from Maconomy** setting determines how People Planner imports budget lines with assignments. If you want to use the People Planner Web Component to make bookings, set this setting to the Import Events and Assignments option:

- Any assignments that you make in the budget line are imported into People Planner and are, therefore, included on the task shown in the People Planner Web Component.
- The import does not try to create bookings based on the budget; this is, instead, left to you to do in the People Planner Web Component.

See Import Events and Assignments for more details about this setting.

Synchronization between Maconomy and the People Planner Web Suite

When you work in the embedded People Planner software—either MyPlan or the People Planner Web Component—you are actually working with data in the People Planner database. This may cause some confusion because you tend to interpret what you see from a Maconomy perspective.

The typical data flow runs from Maconomy to People Planner, and this means that it is typically People Planner that is lagging behind, for example:

1. You have a job open in Maconomy and are working with the budget.
2. At the same time, the People Planner Web Component is also open, and you are assigning resources and creating bookings on the project.
3. You then add a new budget line in Maconomy.
   - This budget line does not automatically appear in the People Planner Web Component.
   - The budget lines only appear in the People Planner Web Component after the budget has been reimported into People Planner.

Troubleshooting Tools

This section provides some general troubleshooting advice if something goes wrong.

Check the People Planner or Maconomy Software

- Is the software installed and configured correctly?
- Is the DataConnection.xml file correct?
- Are the settings correct?

Check the IIS Log

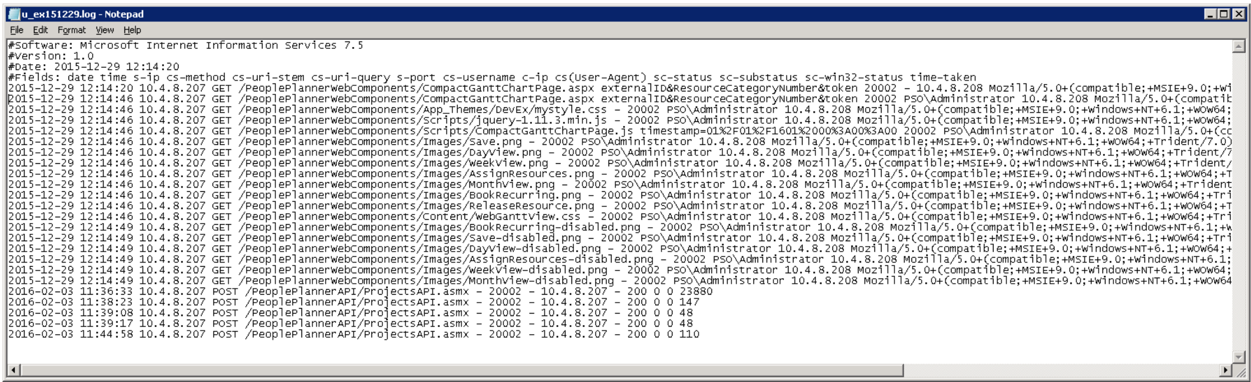
All of the integrations involve a web server. The integration first calls the web server, and the web server then passes the call through to the web page or web service in question.

This means that all calls are first registered in the log file for the web server. If this goes well—usually seen as a status code 200 in the log—the call is passed through to the People Planner software. Only then is it also logged there.

For an IIS web server, the log is placed in:

`C:\inetpub\logs\LogFiles`

You can then open the log file in a normal text editor.



u_ex151229.log - Notepad

File Edit Format View Help

```
#Software: Microsoft Internet Information Services 7.5
#Version: 1.0
#Date: 2015-12-29 12:14:20
#Fields: date time s-ip cs-method cs-uri-stem cs-uri-query s-port cs-username c-ip cs(User-Agent) sc-status sc-substatus sc-win32-status time-taken
2015-12-29 12:14:20 10.4.8.207 GET /PeoplePlannerWebComponents/CompactGanttChartPage.aspx externalID&ResourceCategoryNumber&token 20002 - 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Wi
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/CompactGanttChartPage.aspx externalID&ResourceCategoryNumber&token 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatib
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/App_Themes/DevEx/mystyle.css - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Scripts/jquery-1.11.3.min.js - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Scripts/CompactGanttChartPage.js timestamp=01%2F01%2F1601%2000%3A00%3A00 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(cc
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/Save.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Trident/7.0)
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/DayView.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Trident/7
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/WeekView.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Trident/
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/AssignResources.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+T
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/MonthView.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Trident
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/BookRecurring.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Tri
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Images/ReleaseResource.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+T
2015-12-29 12:14:46 10.4.8.207 GET /PeoplePlannerWebComponents/Content/WebGanttView.css - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Tri
2015-12-29 12:14:49 10.4.8.207 GET /PeoplePlannerWebComponents/Images/BookRecurring-disabled.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+W
2015-12-29 12:14:49 10.4.8.207 GET /PeoplePlannerWebComponents/Images/Save-disabled.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+Tri
2015-12-29 12:14:49 10.4.8.207 GET /PeoplePlannerWebComponents/Images/DayView-disabled.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;+
2015-12-29 12:14:49 10.4.8.207 GET /PeoplePlannerWebComponents/Images/AssignResources-disabled.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;
2015-12-29 12:14:49 10.4.8.207 GET /PeoplePlannerWebComponents/Images/WeekView-disabled.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64;
2015-12-29 12:14:49 10.4.8.207 GET /PeoplePlannerWebComponents/Images/MonthView-disabled.png - 20002 PSO\Administrator 10.4.8.208 Mozilla/5.0+(compatible;+MSIE+9.0;+Windows+NT+6.1;+WOW64
2016-02-03 11:36:33 10.4.8.207 POST /PeoplePlannerAPI/ProjectsAPI.asmx - 20002 - 10.4.8.207 - 200 0 0 23880
2016-02-03 11:38:23 10.4.8.207 POST /PeoplePlannerAPI/ProjectsAPI.asmx - 20002 - 10.4.8.207 - 200 0 0 147
2016-02-03 11:39:08 10.4.8.207 POST /PeoplePlannerAPI/ProjectsAPI.asmx - 20002 - 10.4.8.207 - 200 0 0 48
2016-02-03 11:39:17 10.4.8.207 POST /PeoplePlannerAPI/ProjectsAPI.asmx - 20002 - 10.4.8.207 - 200 0 0 48
2016-02-03 11:44:58 10.4.8.207 POST /PeoplePlannerAPI/ProjectsAPI.asmx - 20002 - 10.4.8.207 - 200 0 0 110
```

The preceding figure shows some calls to the People Planner Components (that is, the People Planner Web Component), as well as some calls to the People Planner API. All of the calls have status code 200 (the fourth number from the end of each line), and this means that the problem is not in the web server.

Other typical status codes include:

- **401** — Authentication problems
- **404** — The page was not found
- **500** — The software failed in some way

> **Tip:** The web server does not necessarily write to the log right away; you may therefore miss some of the calls that you expect to see there. In this case, you can force IIS to flush all pending log entries to the log file.
>
> Open a command prompt, and type the following command:
>
> `netsh http flush logbuffer`

People Planner Logs

If the web server's own log shows that the problem was not there, you can consult the log files of the People Planner software (the Maconomy case is covered in the following section).

To inspect the correct log, you must understand which part is involved in the integration that you are currently troubleshooting.

Scenario	People Planner Software
Running an import by clicking one of the buttons in the Ribbon or the PG.	People Planner Windows application
Running an import by executing a Task Specification manually	People Planner Windows application

Scenario	People Planner Software
Running an import by executing a scheduled task, either manually or according to its schedule	People Planner Service
Pushing a project from Maconomy	People Planner API web service
Importing ETCs into Maconomy	People Planner API web service
Importing Periodic Budgets into Maconomy.	People Planner API web service
Silent Sign In	People Planner API web service
MyPlan (embedded in the WSC)	MyPlan
People Planner Web Component	People Planner Web Components

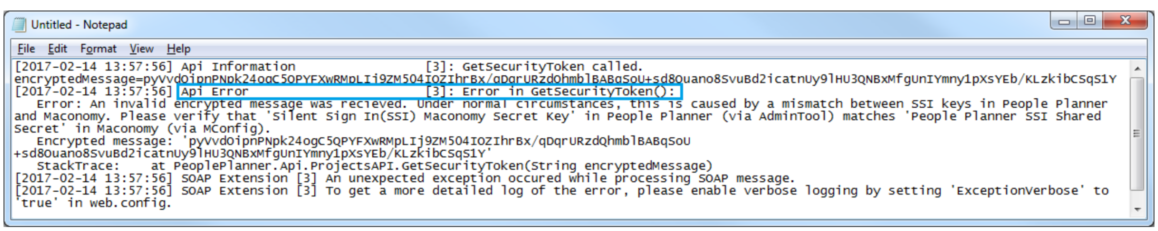
If you are not satisfied with the amount of logging, you can set the loggingLevel to “Verbose.” See Set the Logging Level for a description of this.

The People Planner API Log

The People Planner-related buttons in the WSC and the People Planner Silent Signing functionality depend on the People Planner API web service. If they fail, it is therefore useful to look at the People Planner API web service log file, which is located at:

```
C:\inetpub\People Planner API\Logs\Api.log
```

The following figure shows a case where Maconomy failed to get an SSI token from People Planner.

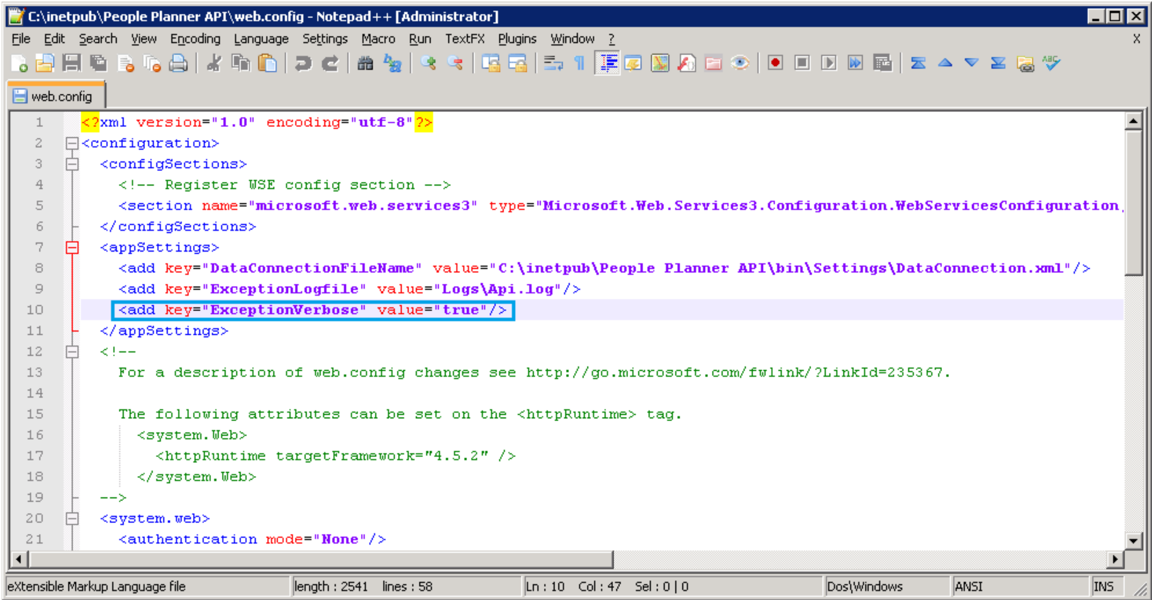


```
Untitled - Notepad
File Edit Format View Help
[2017-02-14 13:57:56] Api Information                 [3]: GetSecurityToken called.
encryptedMessage=pyVvdOipnPNpk24ogC5QPYFXwRMpLIj9ZM504IOZIhrBx/qDqrURzdQhmblBABqSoU+sd8Ouano8SvuBd2icatnUy9lHU3QNBxMfgUnIYmny1pXsYEb/KLzkibCSqS1Y
[2017-02-14 13:57:56] Api Error                       [3]: Error in GetSecurityToken():
   Error: An invalid encrypted message was recieved. Under normal circumstances, this is caused by a mismatch between SSI keys in People Planner
and Maconomy. Please verify that 'Silent Sign In(SSI) Maconomy Secret Key' in People Planner (via AdminTool) matches 'People Planner SSI Shared
Secret' in Maconomy (via MConfig).
   Encrypted message: 'pyVvdOipnPNpk24ogC5QPYFXwRMpLIj9ZM504IOZIhrBx/qDqrURzdQhmblBABqSoU
+sd8Ouano8SvuBd2icatnUy9lHU3QNBxMfgUnIYmny1pXsYEb/KLzkibCSqS1Y'
   StackTrace:    at PeoplePlanner.Api.ProjectsAPI.GetSecurityToken(String encryptedMessage)
[2017-02-14 13:57:56] SOAP Extension [3] An unexpected exception occured while processing SOAP message.
[2017-02-14 13:57:56] SOAP Extension [3] To get a more detailed log of the error, please enable verbose logging by setting 'ExceptionVerbose' to
'true' in web.config.
```

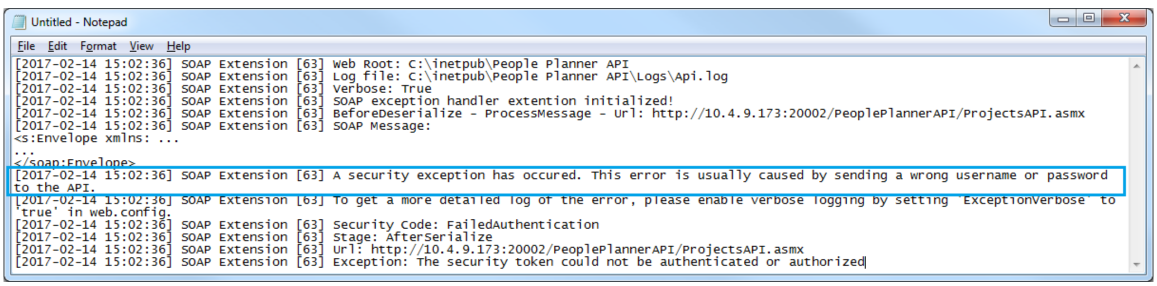
According to the error message, the most likely cause is that the **Silent Sign In (SSI) Maconomy Secret Key** in People Planner does not match the **People Planner SSI Shared Secret** in Maconomy.

As described in the previous section, if you are not satisfied with the amount of logging, you can set the loggingLevel to Verbose.

However, sometimes the problem is on a very fundamental level, for example, when the Web Service API Password is not configured to the correct one in Maconomy. In this case, it is the call itself that fails, before it ever gets to the People Planner API. To log this type of error, you must enable verbose logging of SOAP-related errors. You do this by editing the web.config file and setting ExceptionVerbose to “true.”



When ExceptionVerbose is set to “true,” the People Planner API log reports a security exception if the password is wrong.



Tip: Remember to set ExceptionVerbose back to “false” afterward.

Maconomy Logs

You can also consult the Maconomy's log files.

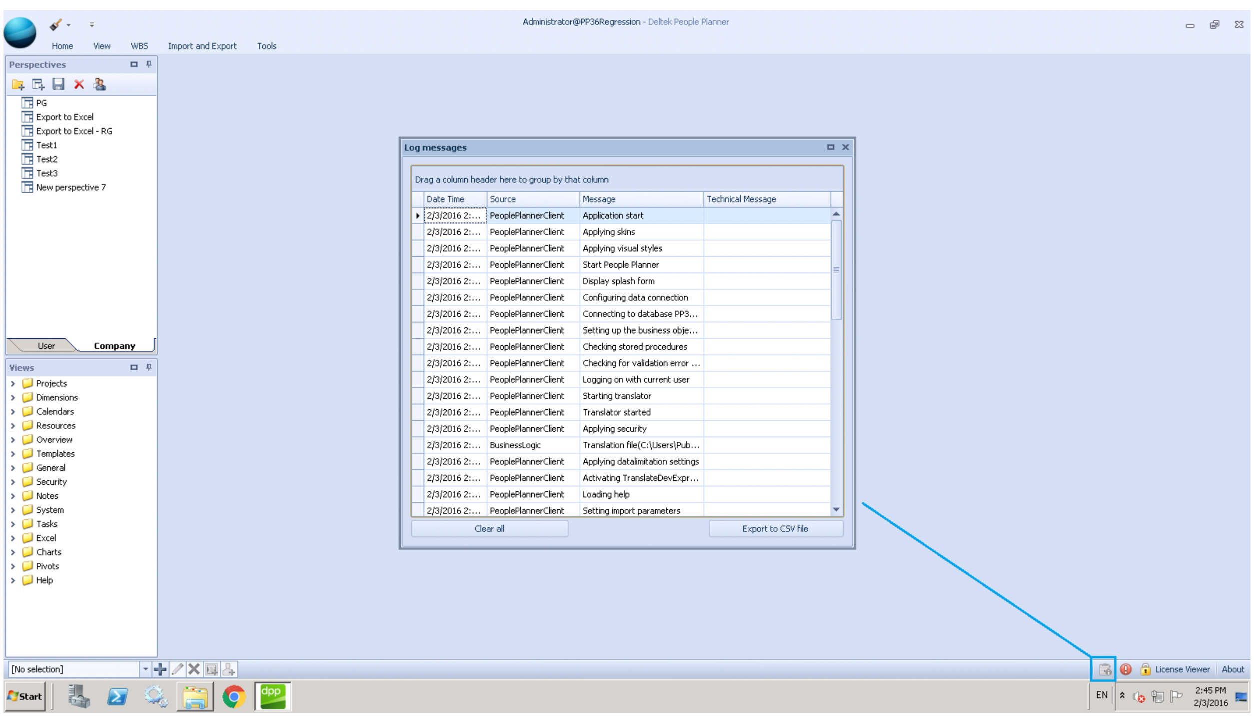
To inspect the correct log, you must understand which part is involved in the integration that you are currently troubleshooting.

Scenario	Maconomy Software
Importing data from Maconomy, except for projects or absences	MaconomyWS web service
Importing projects from Maconomy Importing actuals from Maconomy	Depending on the configuration in People Planner: ▪ MaconomyWS web service ▪ Deltek Coupling Service (hosts the Maconomy RESTful web service)
Importing absences from Maconomy	Deltek Coupling Service (hosts the Maconomy RESTful web service)

Logging in the People Planner Windows Application

When you start the People Planner Windows application, it starts logging. You can open this log by clicking the small log button in the lower-right corner; the Log Messages view opens.

The following figure shows the result of an Import of Master Data.



This log only contains log messages from the People Planner application itself. If the import is done through the People Planner service—for example, because you are running the import as a Scheduled Task—it is not logged here.

When the People Planner application is closed, this log is cleared. The log entries are still saved in the execution logs.

Execution Logs

When you have verified that the software is functioning correctly, you can investigate the execution logs.

Data-Centric Views

As an alternative to the execution logs, you can also consult the data-centric views for the most important imports:

- Import of Master Data
- Import of Projects
- Import of Actuals

See the individual sections for descriptions of these views.

Fiddler

If you are permitted to install third-party software on your system, you can download and install Fiddler from Telerik software:

`http://www.telerik.com/fiddler`

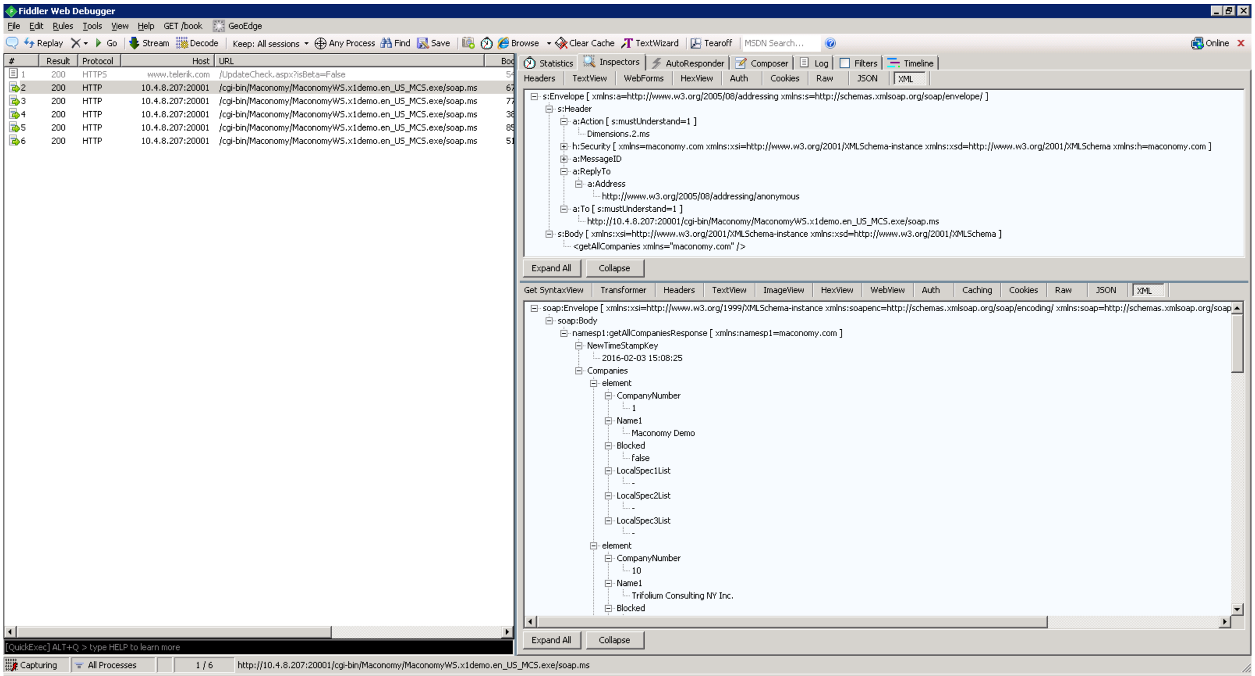
This tool is free, and can be used to inspect HTTP traffic. Using Fiddler, you can inspect what is called and how Maconomy replies.

The Fiddler GUI is divided into three parts:

- The calls in a list on the left side.
- The individual requests (calls) on the right side in the top pane.
- The individual replies on the right side in the bottom pane.

The following example is from an Import of Master Data. It shows:

- The MaconomyWS web service is called 5 times. Each call is a success with status code 200.
- The first is a call to Dimensions.2.ms—one of the methods in MaconomyWS—and the call is to getAllCompanies, specifically.
- Maconomy replies with a list of companies, where the first is named Maconomy Demo.



Note: Fiddler can only be used to inspect traffic that comes directly from the People Planner web application; it does not intercept traffic from the People Planner Service.

Import Data from Excel, CSV, SQL Server, and Oracle

One of the task types in People Planner is the **Import External Data (Excel/CSV/SQL Server/Oracle)** task type.

With this task type, you can import data from an external source. The supported sources are:

- An Excel file, which can contain one or more worksheets.
- A CSV file.
- An SQL Server database.
- An Oracle database.

This task type can be used as a supplement to the existing Maconomy integration, or it can be used to build an integration to a third-party system, such as a SAP system.

> **Note:** You can only use this to import data into People Planner. If you need to export data from People Planner to a third-party system, you should use the **External Views** instead.

When setting up such a task, you start by defining an **Import Mapping**. The purpose of an Import Mapping is to act as a translator between the data formats of the external source and those of the internal People Planner tables.

When you have defined the Import Mapping, you can use it to define the Task Specification, and you can add a Scheduled Task on top of that to provide automated execution:

Import Mapping → Task Specification → Scheduled Task

A Word of Caution

Import Mappings import external data almost directly into the tables in the People Planner database. In certain cases, an Import Mapping may partially bypass the normal business logic built into the People Planner application. This can result in the creation of data structures that would not normally be possible—or at least are highly unusual—and in a way that results in People Planner not performing very well.

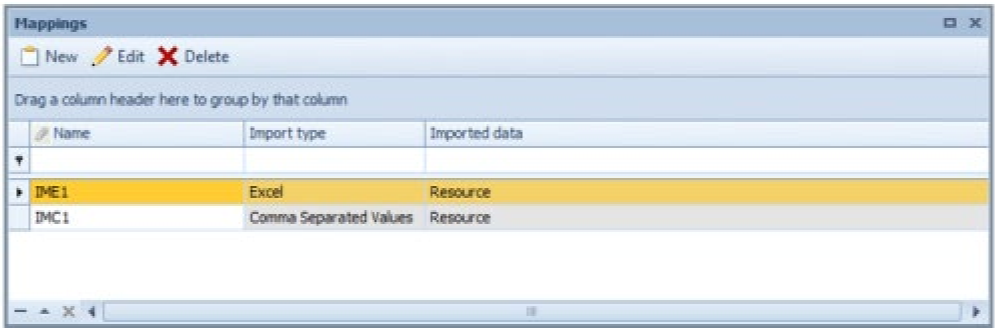
As with any powerful tool, the Import Mapping requires expert knowledge of how to use it properly, or it can result in unforeseen issues. In the case of Import Mappings, some extra knowledge about the business logic of People Planner is certainly required.

To put it in another way: Just because your import mapping seems to be working, this is not a guarantee that it works well.

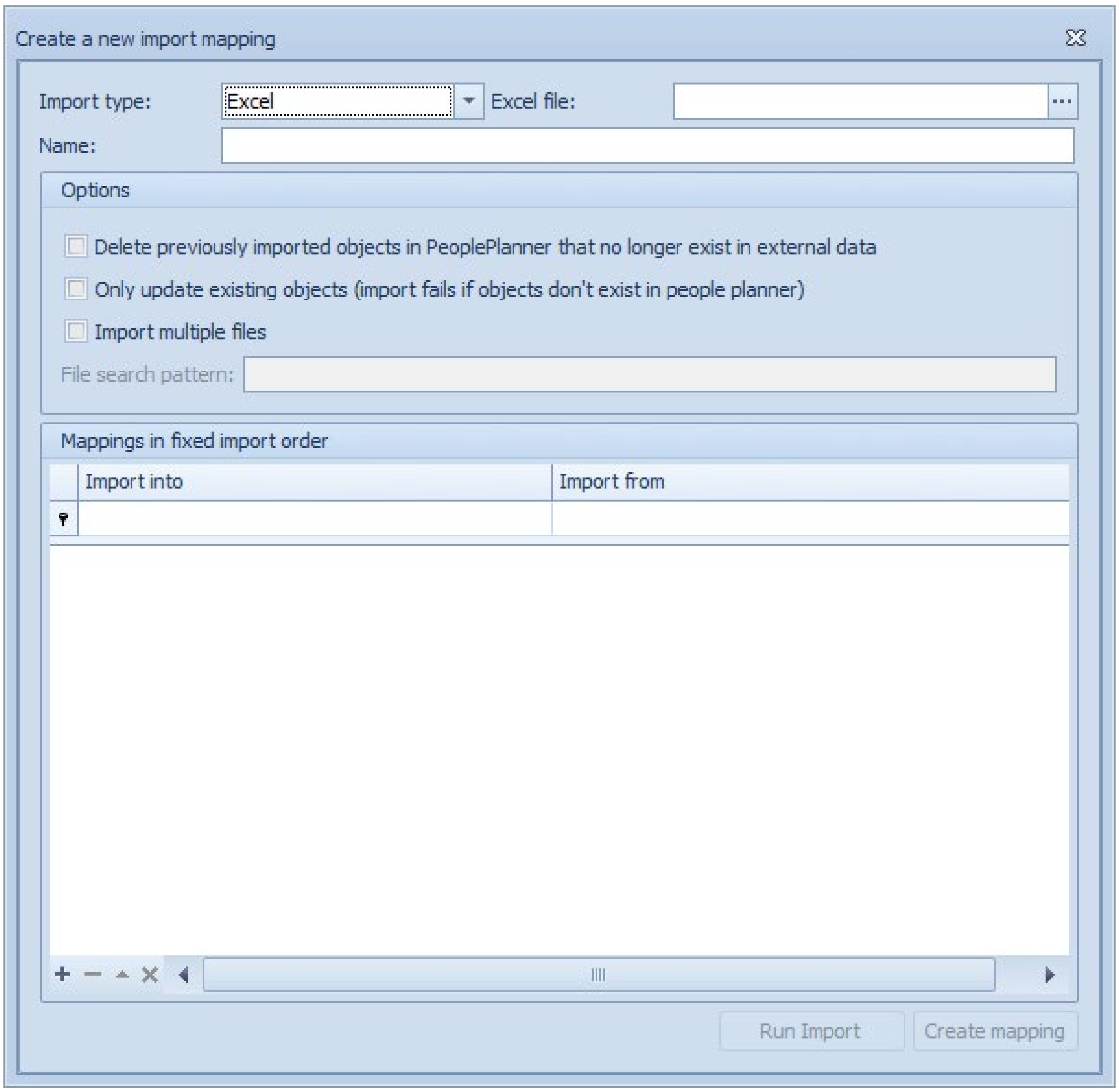
Create an Import Mapping

To create an Import Mapping:

1. Navigate to **Views » Tasks » Mappings**.



2. Click the **New** button.



From this point on, the steps depend on which kind of **Import Type** you want.

The available Import Types are described in the following table.

Import Type	Description
Excel	The import data is stored as an Excel file and on one or more worksheets. Both of the old .xls and the newer .xlsx formats are supported.
CSV File	The import data is stored in a comma-separated file.
SQL Server	The import data is stored in an SQL Server database. This can be in the same SQL Server that People Planner uses for its own database, or it can be in a different SQL Server.
Oracle	The import data is stored in an Oracle database. This can be the Oracle[12] database that Maconomy is using for its database. **Note:** Import from Oracle is only supported on 32-bit systems.

Import Excel and CSV Files

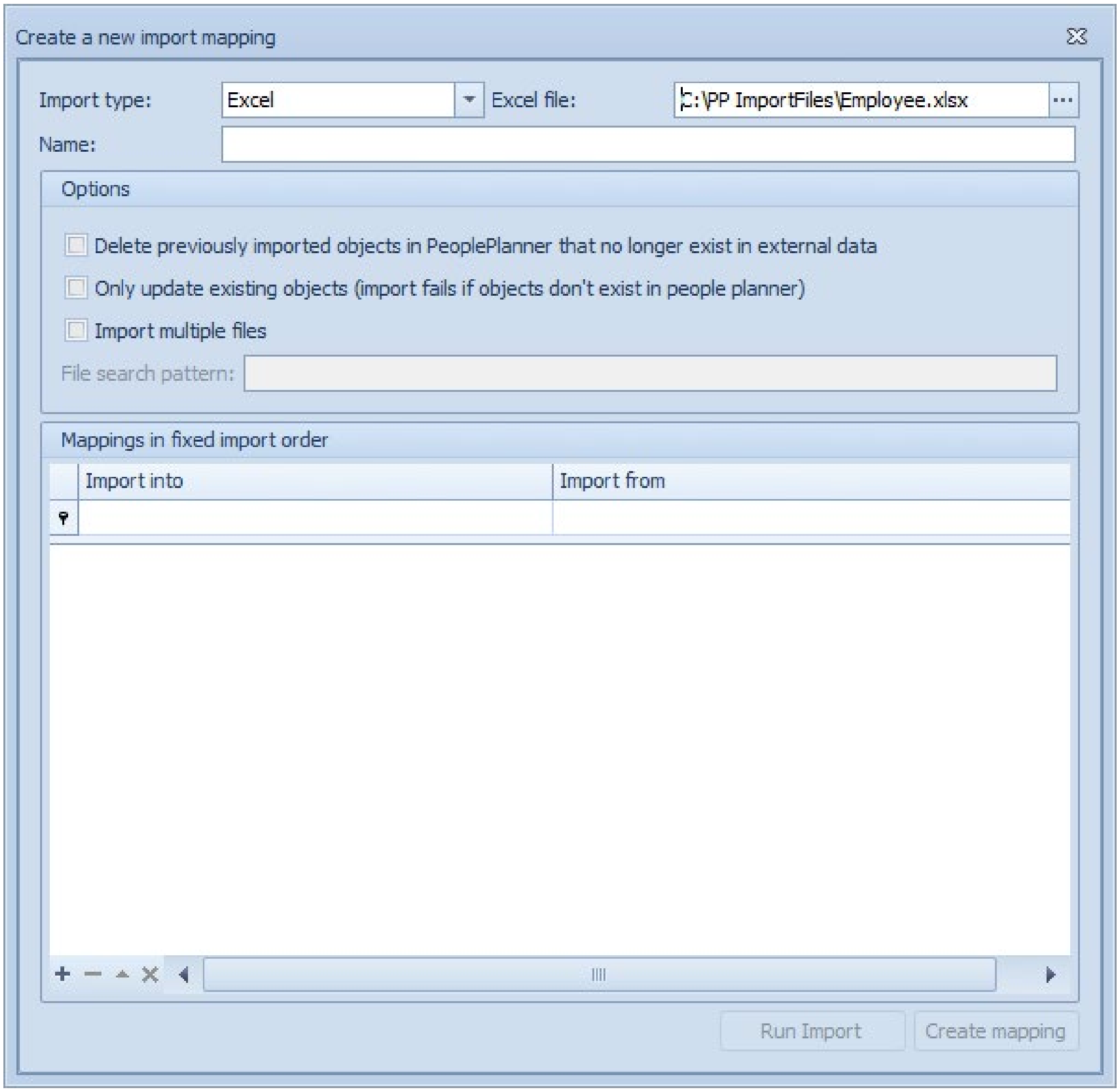
When the import is from Excel-files or CSV-files, you can choose between either importing a specific file, or importing all matching files in a specific folder.

To create an import-mapping, People Planner must have an initial file to learn the expected format from.

To select a file to import:

1. Click the Browse button at the end of the **Excel file** field.
2. Select the file that you want to import.

[12] Maconomy also supports using SQL Server as an alternative to Oracle.



You can now create the import-mapping as described in Import from an Excel File and Import from a CSV File.

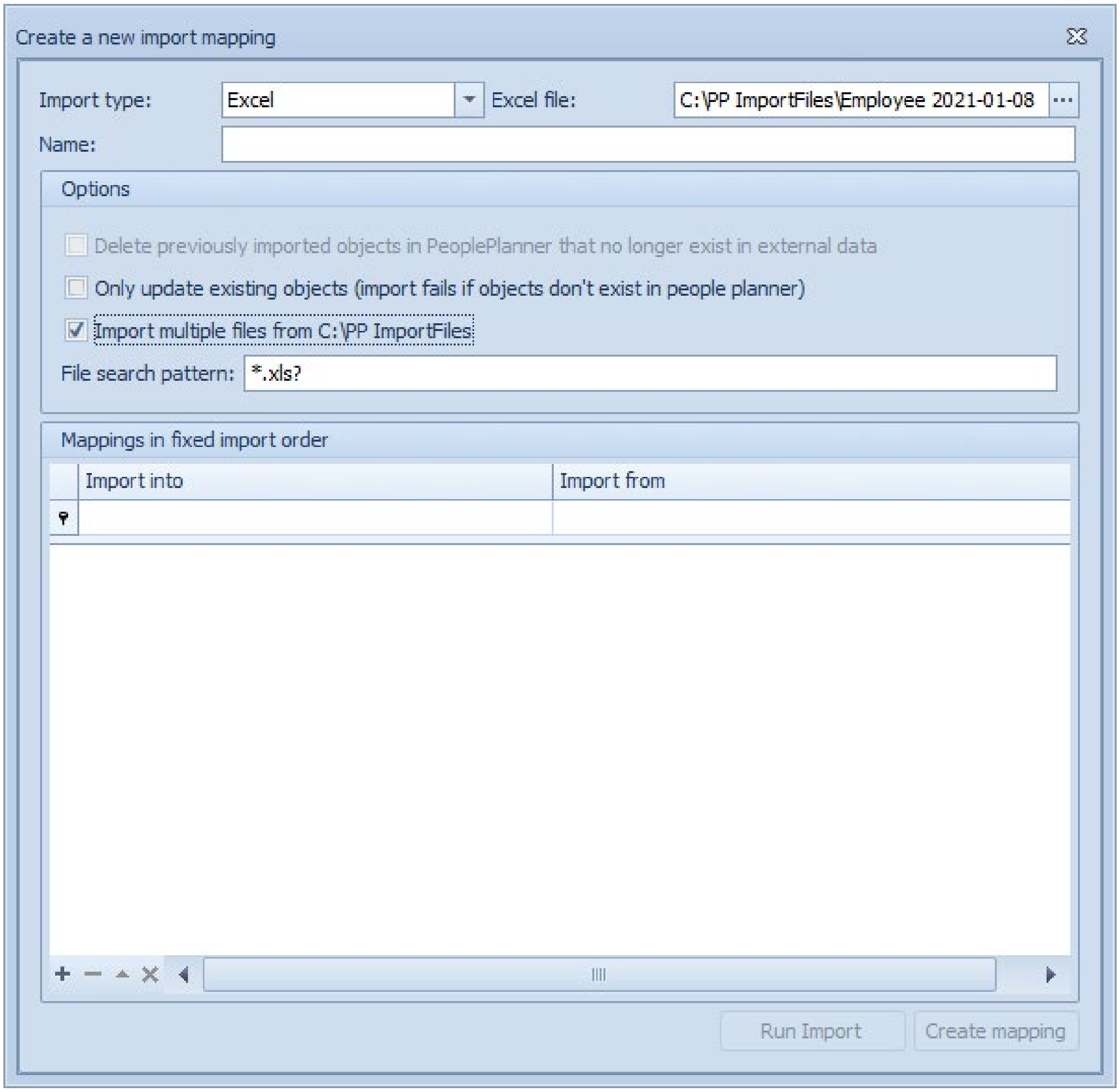
If this is all you do, when the import runs, it looks for a file by the exact name and path and import the data from that. To import new data, you overwrite the existing file with a file with the new data and run the import again.

For this to work, it is important that the new file always have exactly the same name and location.

If however, your file has a name that changes, for example, because the filename includes a timestamp that indicates when it was created, you can instead choose to keep the directory-name constant and then import all the files from the folder.

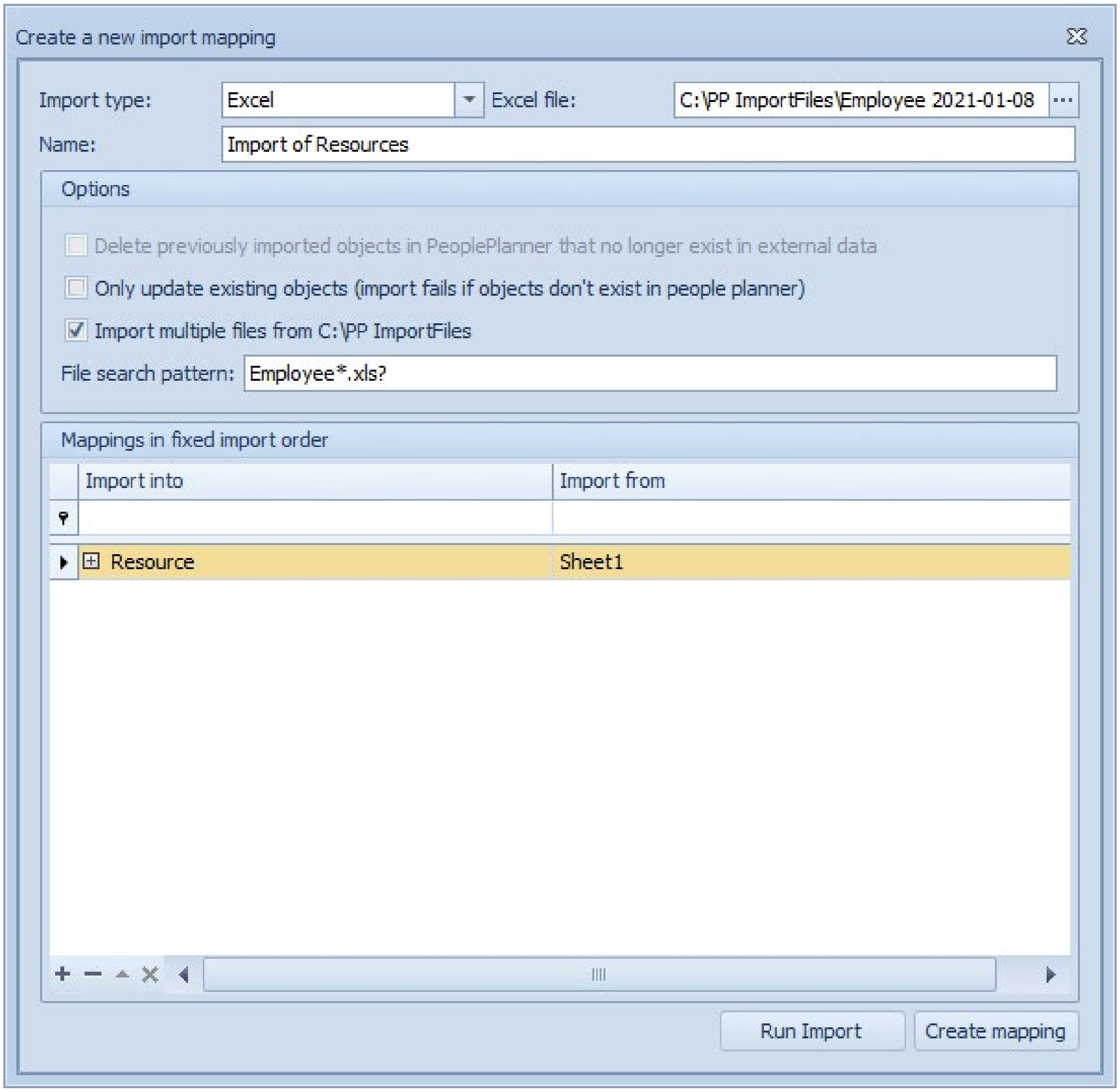
To indicate that you want to import all files from a specific folder:

1. Select the **Import Multiple Files** checkbox.
2. In the **File Search Pattern** field, enter a file-mask for the files you want to import.



The format of all the imported files must be the same as the file that is used to define the import-mapping. You can have files for different import-mappings in the same folder, but then you must distinguish between them in the **File Search Pattern**.

For example, if you are defining an import mapping to import resources, you can specify that you are only interested in the files where the name is prefixed with “Employee”:



If the folder contains more than one file that fulfils your File Search Pattern, they are imported in the order of the oldest file first.

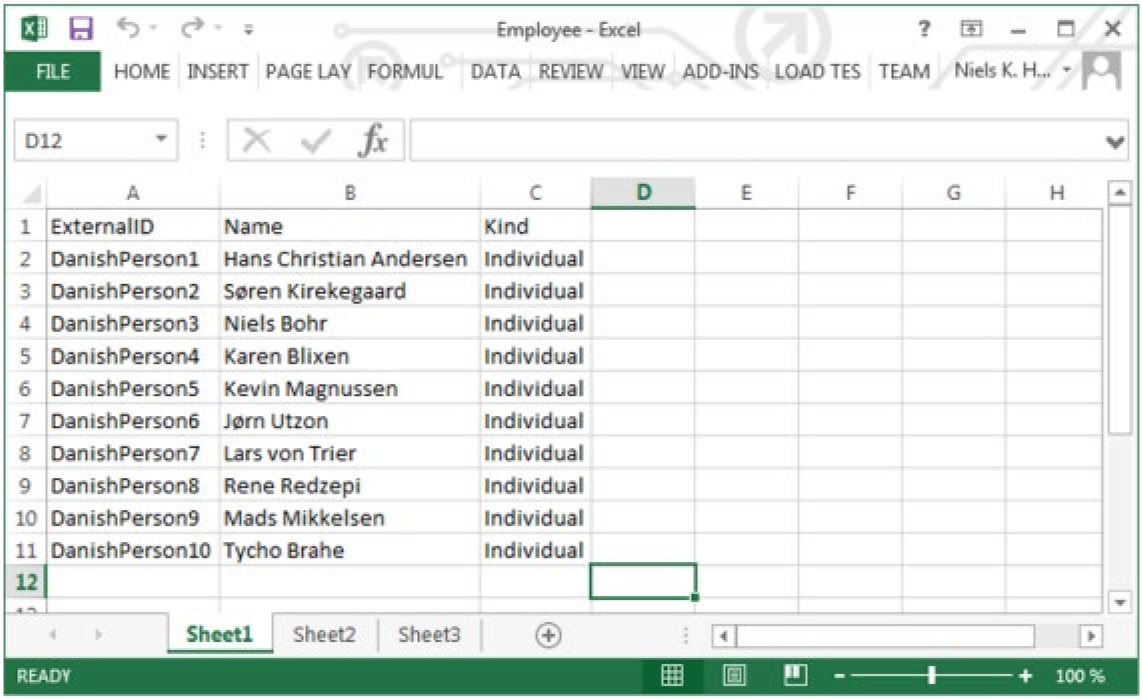
Note: When you define the task specification on top of the import mapping, you can specify that files to be imported shall be moved out of the folder and into a different folder. This way you are sure that the import will not import the file more than once. See Task Specification.

Import from an Excel File

The following is based on an example where you are creating an Import Mapping that imports employees. The data is stored in a file called Employees.xlsx, and after the import it is visible in the Resources view as Kind = Individual.

Note: People Planner provides the option to export a Gantt Chart, such as the Project Managers Gantt Chart, to Excel. Despite the similarity in names, this is completely unrelated to the Import from Excel functionality described here.

The example file contains three columns, one line with headers, and ten additional lines with the data, as shown in the following figure.

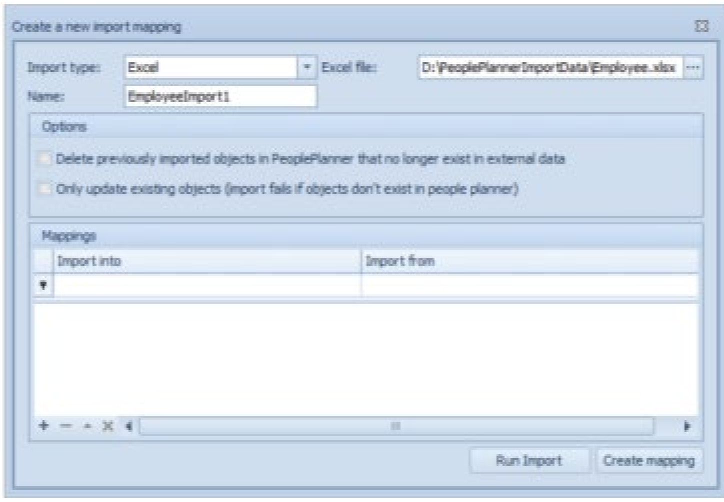


With the **Create a New Import Mapping** view opened, you continue by doing the following:

1. Select **Excel** from the drop-down list for the **Import type** field.
2. Click the **…** button to the right of the **Excel file** field to browse for the **Employees.xlsx file** in the file system and select it.

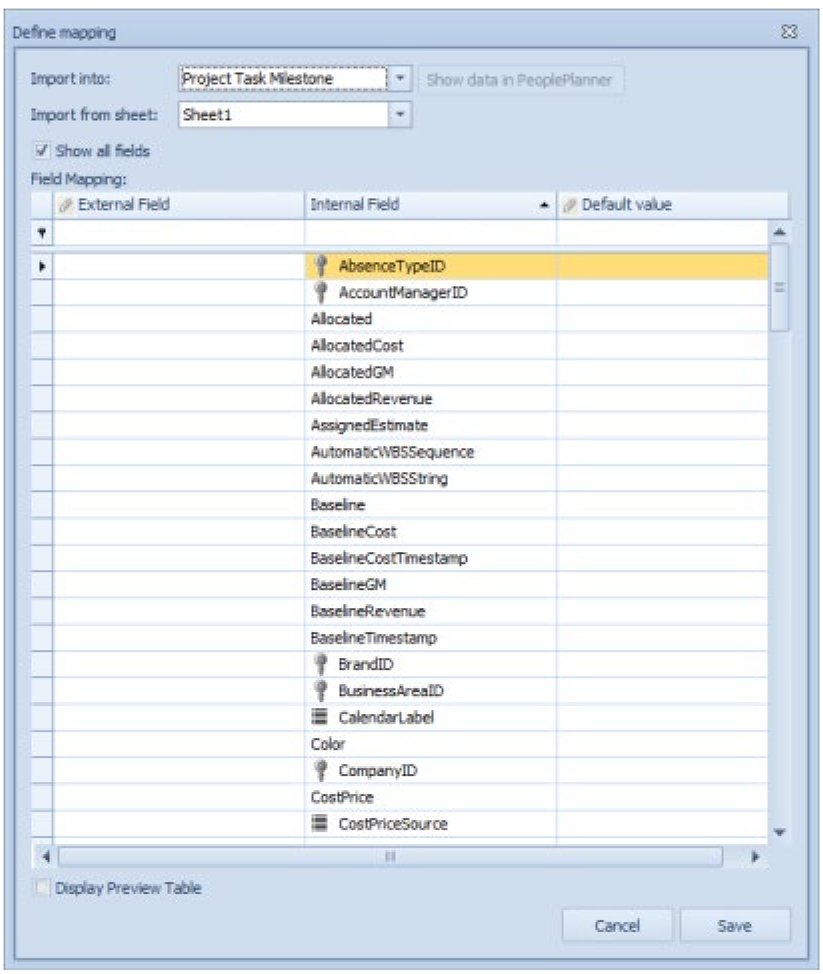
> **Note:** You cannot continue to step 3 until you have selected an Excel file. In the example, you already have a file, and it is therefore not a problem. However, if you are defining a new Import Mapping, you might not have an Excel file yet. This presents you with a bit of a hen-and-eggs problem where you do not necessarily know the format of the Excel file before you have the mapping, but you cannot create a mapping before you have the format of the Excel file. The solution is to create an empty Excel file and use that file to get you started. It then becomes an iterative process to define the structure of the Excel file and the mapping. For more information, see Determining the Format of the External Data.

3. Enter a name for the Import Mapping in the **Name** field.

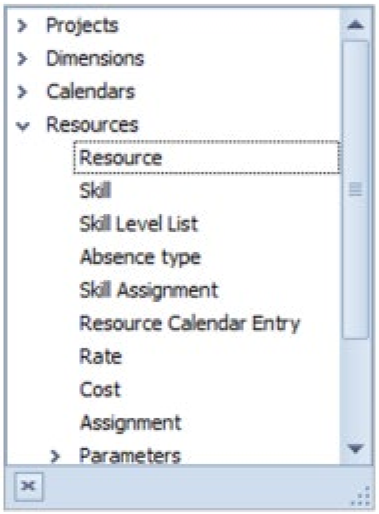


You are now ready to continue with adding a mapping.

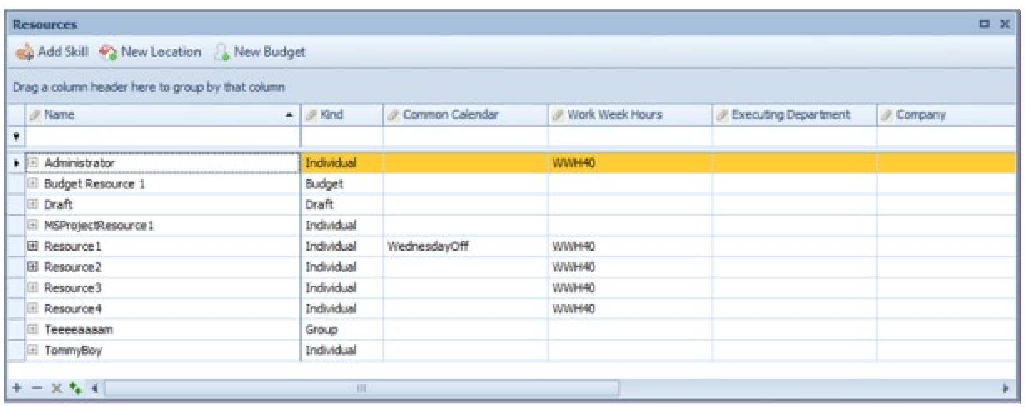
4. Click the **+** button near the lower-left corner of the view. The Define mapping view opens.



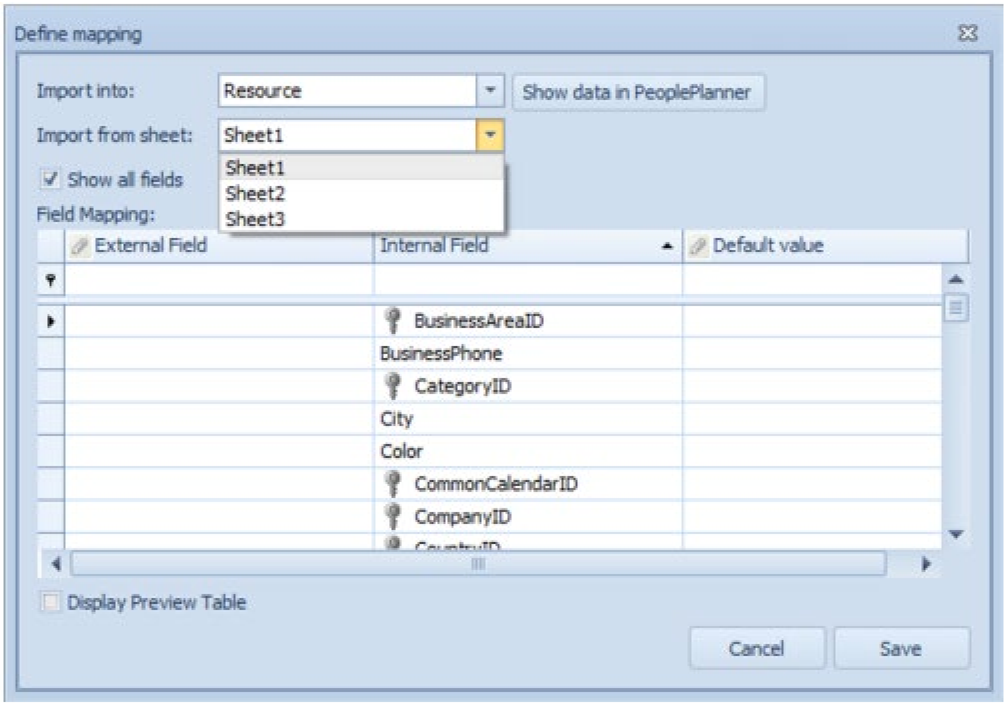
5. Choose the People Planner table into which you want to import the external data from the drop-down list for the **Import into** field. In this example, this is: Resources » Resource.



> **Note:** Before you start to define Import Mappings, you must have a working knowledge of the People Planner database tables and how they relate to each other. To help with this, you can use the **Show Data in People Planner** button. When you have selected a table in the Import into field that corresponds directly to a view People Planner, this button becomes enabled. When you click it, the view opens and displays the current data.



6. Choose the sheets in the Excel file from which you want to import data from the drop-down list for the **Import from Sheet** field.

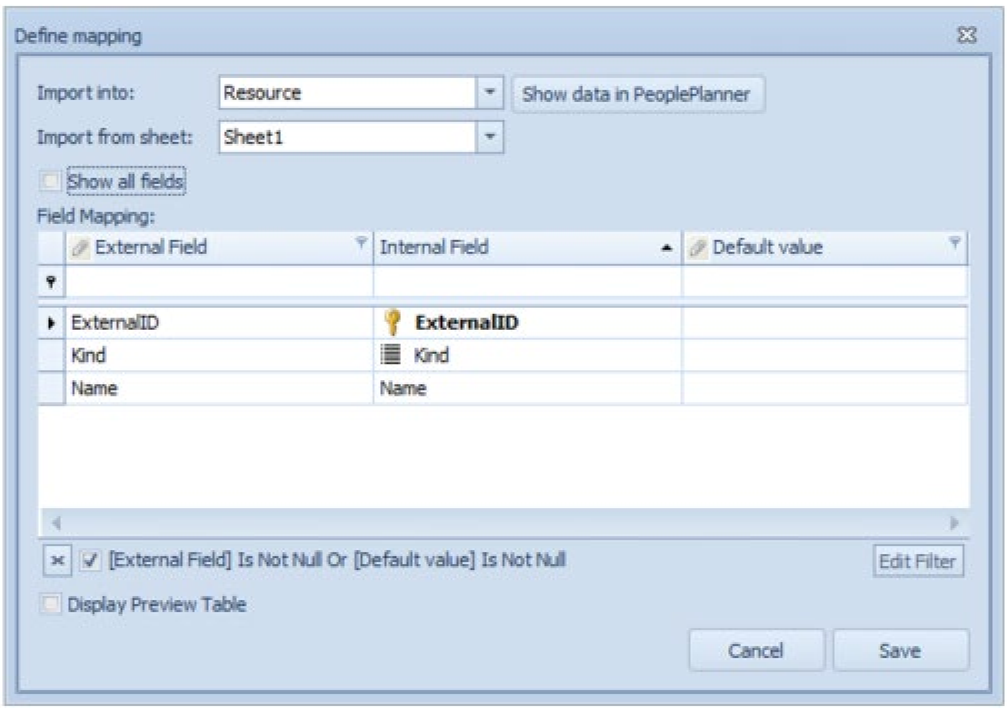


When you have chosen a sheet to get the data from and a table to import the data into, People Planner attempts to map the External Fields to the Internal Fields.

The list of fields can be very long because the number of available Internal Fields is long. You can use the **Show All Fields** checkbox to toggle between showing all of the possible fields and showing only the fields that have already been mapped. This is useful when you want to confirm that you have mapped the fields that you need to map.

> **Note:** People Planner attempts to map the fields based on their names. Sometimes this mapping fails, for example, because the names are not identical or because you have not included a column that is mandatory for the mapping. In this case, you must select the checkbox again if you want to see the fields that are missing from the mapping.

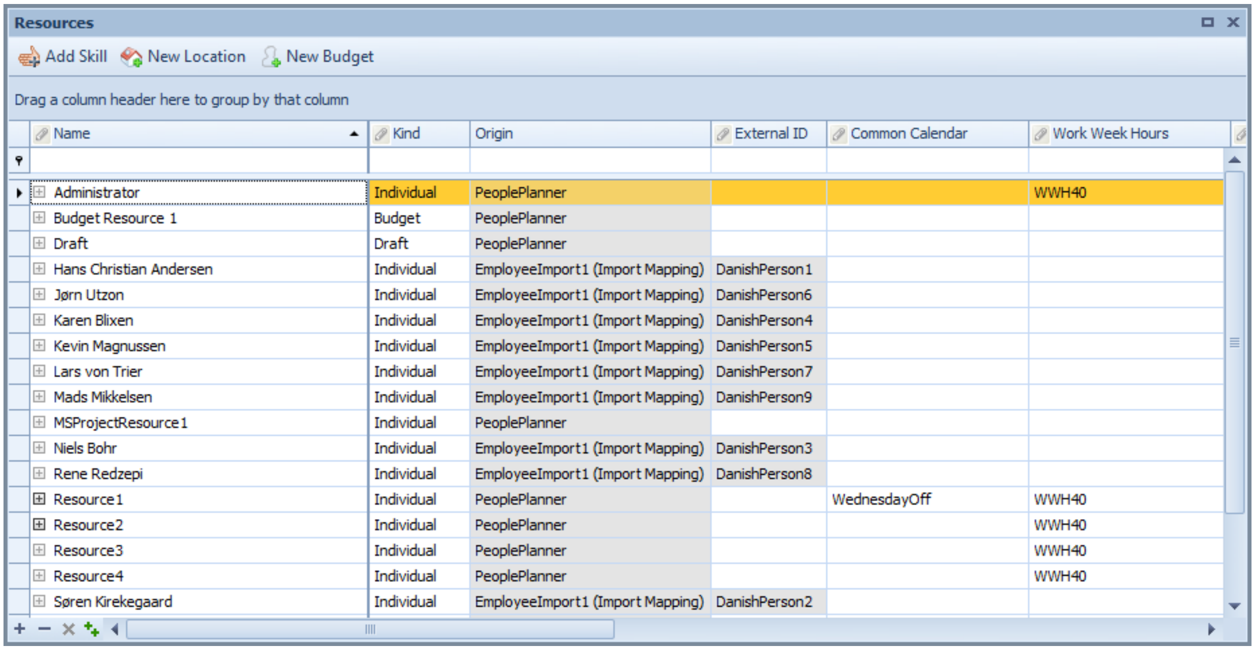
In the example, you have the three columns **ExternalID**, **Name**, and **Kind**, and People Planner is able to map the fields correctly.



7. Click the **Save** button when you are done defining the mapping.
8. Click the **Create Mapping** button to save the new Import Mapping.

In this example, you can see the imported data in the Resources view. In addition to the default columns, the two columns **Origin** and **External ID** have been added in the following figure. The Origin shows that the resources were imported by the Import Mapping with the name

EmployeeImport1. The External ID column contains the values from the ExternalID column in the original Excel spreadsheet.



Name	Kind	Origin	External ID	Common Calendar	Work Week Hours
Administrator	Individual	PeoplePlanner			WWH40
Budget Resource 1	Budget	PeoplePlanner			
Draft	Draft	PeoplePlanner			
Hans Christian Andersen	Individual	EmployeeImport1 (Import Mapping)	DanishPerson1		
Jørn Utzon	Individual	EmployeeImport1 (Import Mapping)	DanishPerson6		
Karen Blixen	Individual	EmployeeImport1 (Import Mapping)	DanishPerson4		
Kevin Magnussen	Individual	EmployeeImport1 (Import Mapping)	DanishPerson5		
Lars von Trier	Individual	EmployeeImport1 (Import Mapping)	DanishPerson7		
Mads Mikkelsen	Individual	EmployeeImport1 (Import Mapping)	DanishPerson9		
MSProjectResource1	Individual	PeoplePlanner			
Niels Bohr	Individual	EmployeeImport1 (Import Mapping)	DanishPerson3		
Rene Redzepi	Individual	EmployeeImport1 (Import Mapping)	DanishPerson8		
Resource1	Individual	PeoplePlanner		WednesdayOff	WWH40
Resource2	Individual	PeoplePlanner			WWH40
Resource3	Individual	PeoplePlanner			WWH40
Resource4	Individual	PeoplePlanner			WWH40
Søren Kirekegaard	Individual	EmployeeImport1 (Import Mapping)	DanishPerson2		

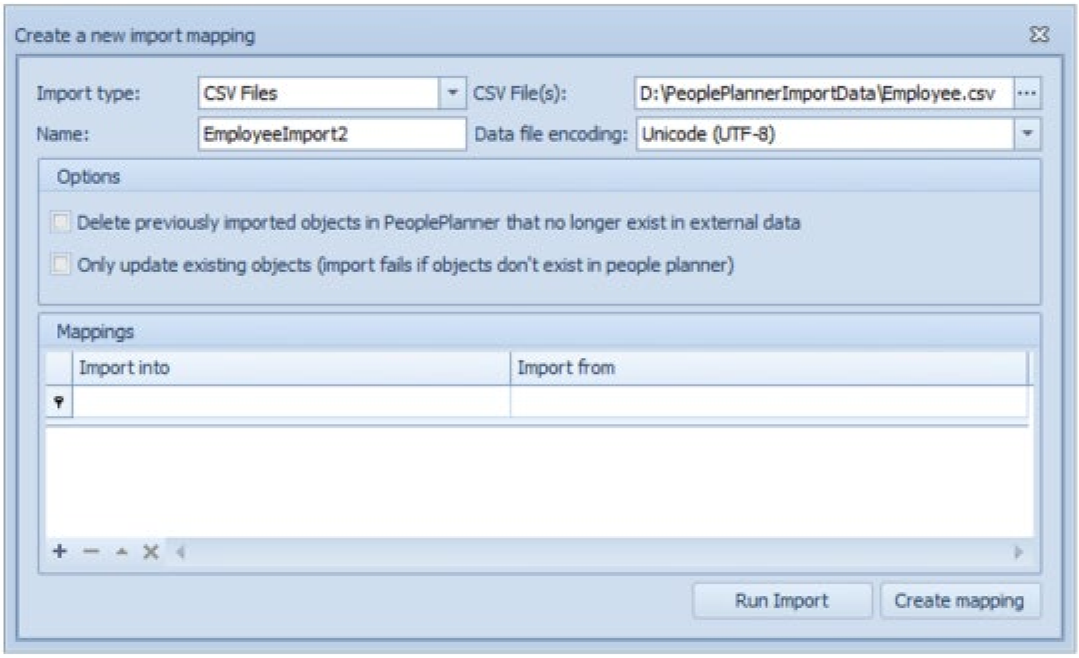
Import from a CSV File

Defining an Import Mapping to get the data from a CSV file is similar to the process for defining an Import Mapping to get the data from an Excel file. When you have opened the Create a New Import Mapping, you continue by performing the following:

1. Choose **CSV Files** from the drop-down list for the **Import type** field.
2. Click the **…** button, to the right of the **CSV File(s)** field to browse for the **Employees.csv file** in the file system and choose it.

> **Note:** You cannot continue unless you choose a CSV file. If you do not yet have one, you can use an empty file.

3. Enter a name for the Import Mapping in the **Name** field.



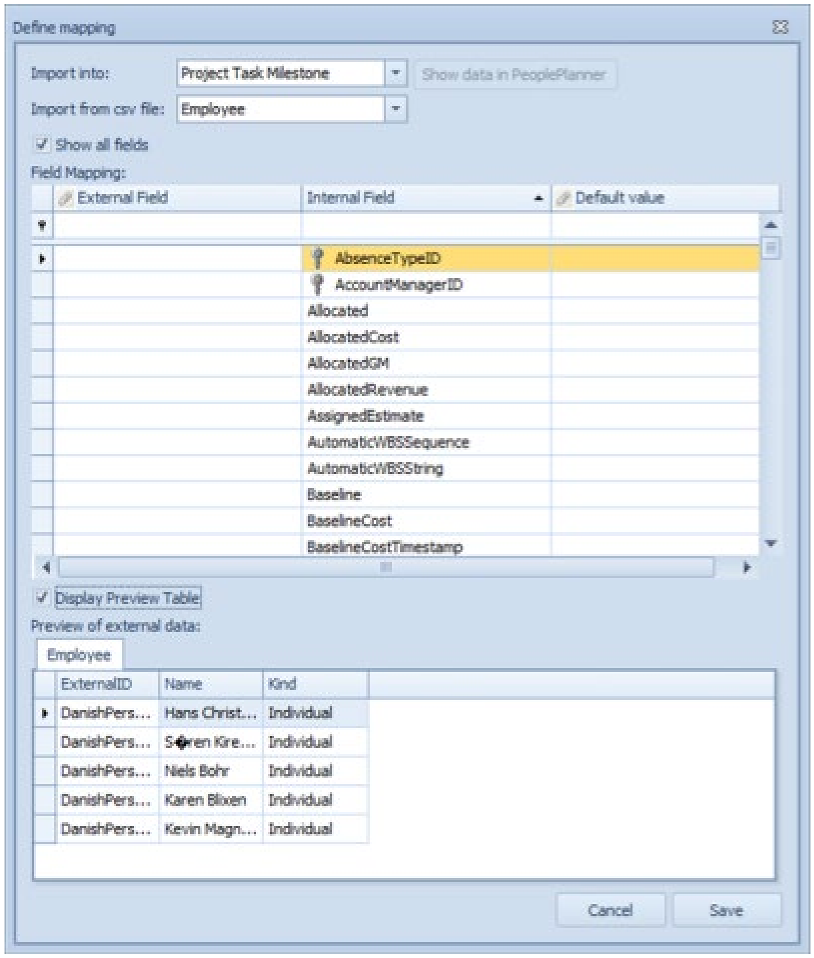
Because a CSV file is simply a raw text file, you also need to choose the correct value for the **Data file encoding** field. If you do not know what the correct value is, you can use the preview function:

a. Click the **+** button near the lower-left corner of the view to open the Define Mapping view.

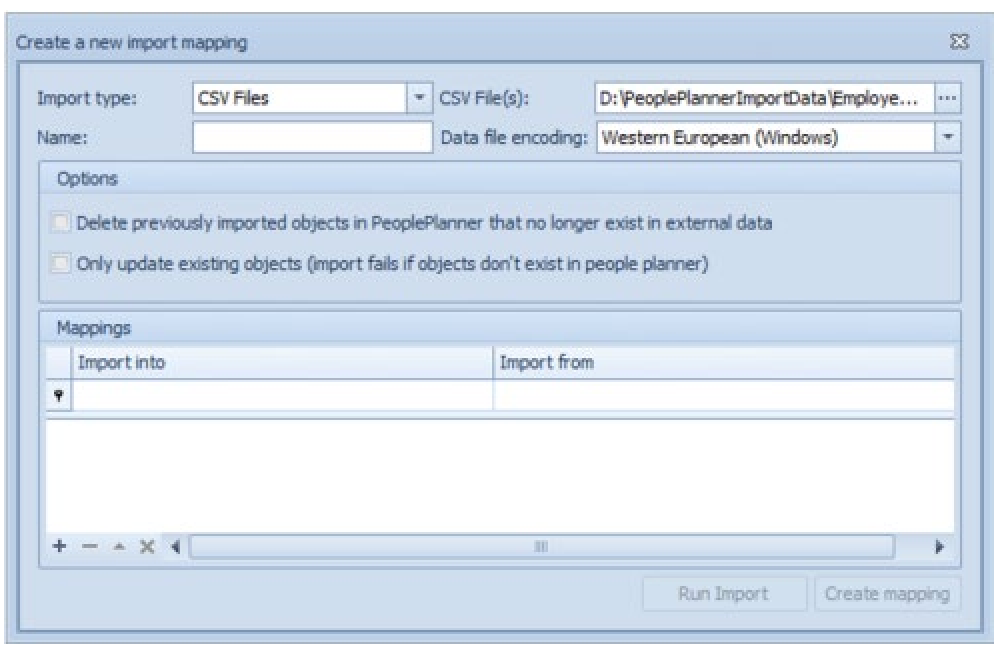
b. Select the **Display Preview Table** checkbox.

The preview shows the content of the CSV file. If you have not selected the correct encoding, some of the characters might appear as � characters.

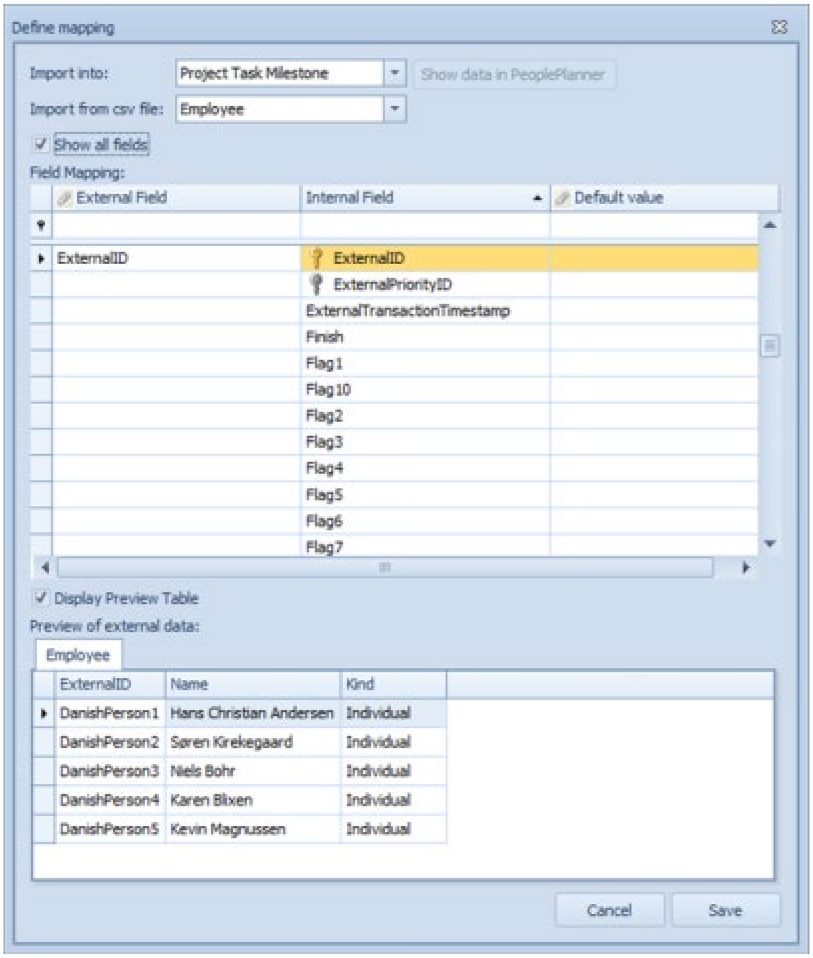
The preview displays up to five rows of data from the file. The remaining rows are not displayed.



In the example, the correct encoding is “Western European (Windows)” because the file was created on a Windows system.

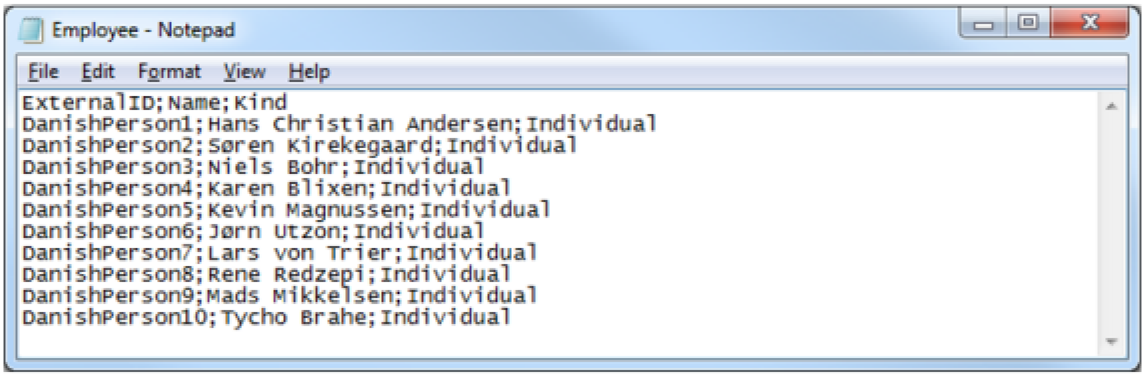


If you have set the encoding to the correct value, the preview shows the special characters correctly.



From this point, creating the Import Mapping generally follows the same process as for the Excel file case.

4. Choose the People Planner table into which you want to import the external data from the drop-down list for the **Import into** field. In this example, this is Resources » Resource.
5. You can choose which of the CSV files you want to import the data from in the **Import from CSV File** field.
6. Select or deselect the **Show All Fields** checkbox to toggle between showing all of the possible fields or only the mandatory fields.
7. Ensure that you have at the least the columns shown in the following figure in the CSV file. The order of the columns is not important, but the names of the columns must appear as the first row. After the first row, you can have some examples of import data.



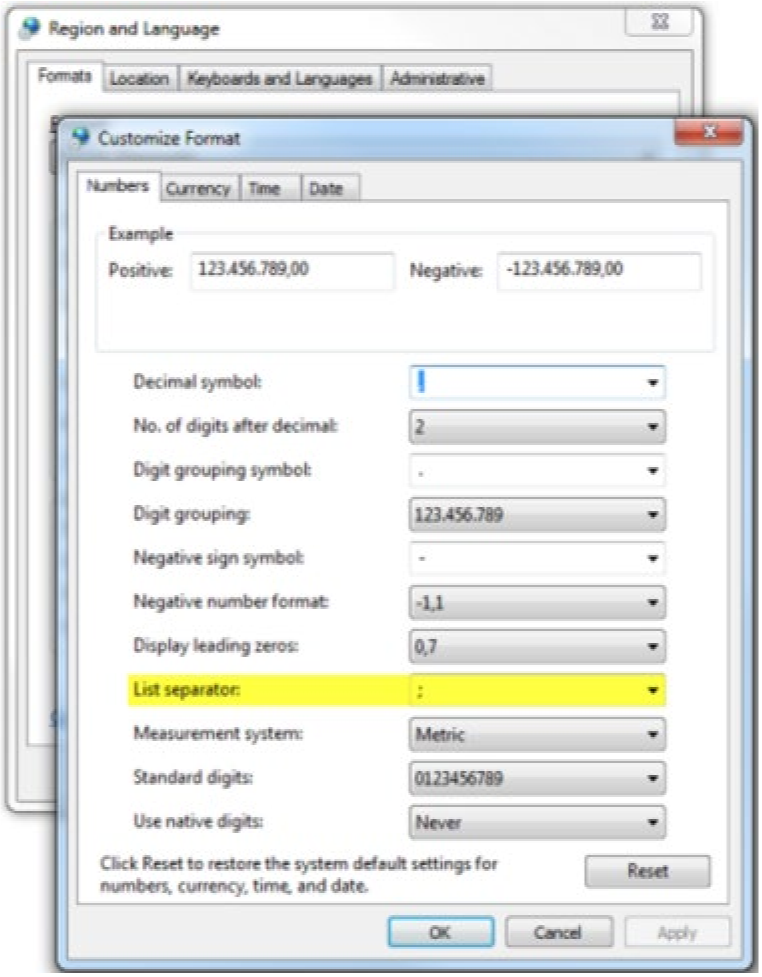
8. When you have mapped the mandatory fields, you can deselect the checkbox and map other fields that you want.
9. Click the Save button when you are done defining the mapping.
10. Click the Create Mapping button to save the new Import Mapping.

CSV is an abbreviation for “comma-separated file.” However, in the preceding example, the data is separated by semicolons (;) instead of commas. You can determine which list separator you should use by examining the Windows settings as follows:

To determine which list separator you should use by examining the Windows settings:

1. Open the Control Panel.
2. Click **Region and Language**.
3. Click the **Formats** tab if it is not already displayed.
4. Click the **Additional settings…** button. The Customize Format dialog is displayed.

5. Click the **Numbers** tab if it is not already displayed and locate the **List separator** field.

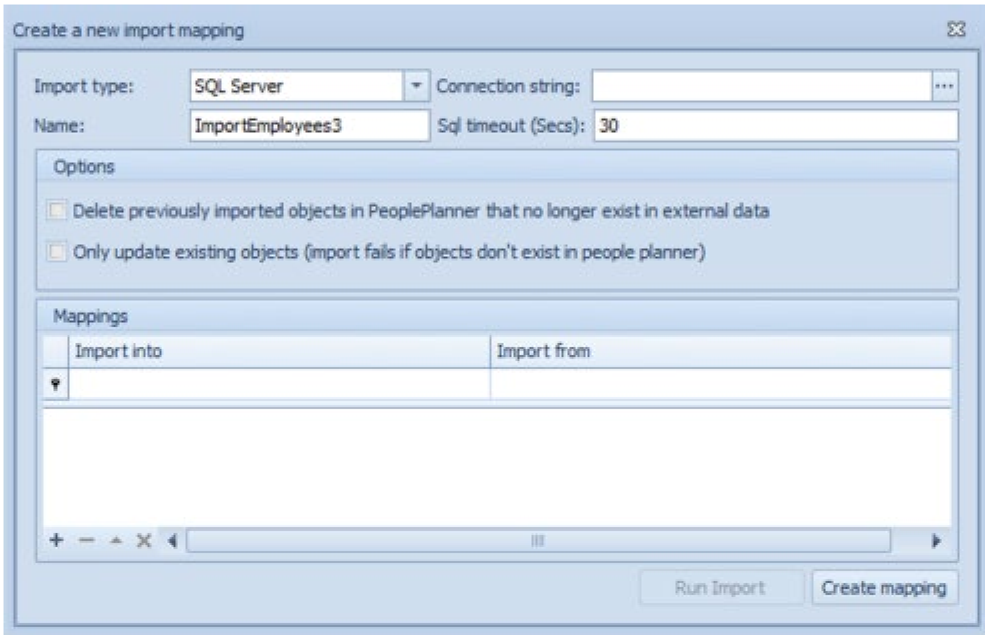


Import from SQL Server and Oracle

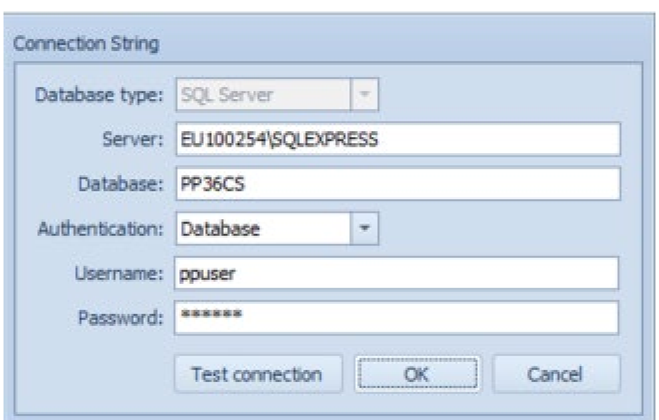
Use the Import from SQL Server import type to import data from another SQL server.

To import data from another SQL Server using the Import from SQL Server import type:

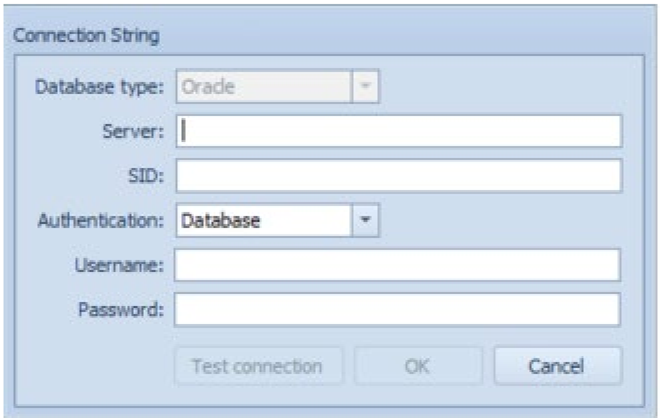
1. Choose **SQL Server** from the drop-down list for the **Import type** field.
2. Enter a name for the Import Mapping in the **Name** field.



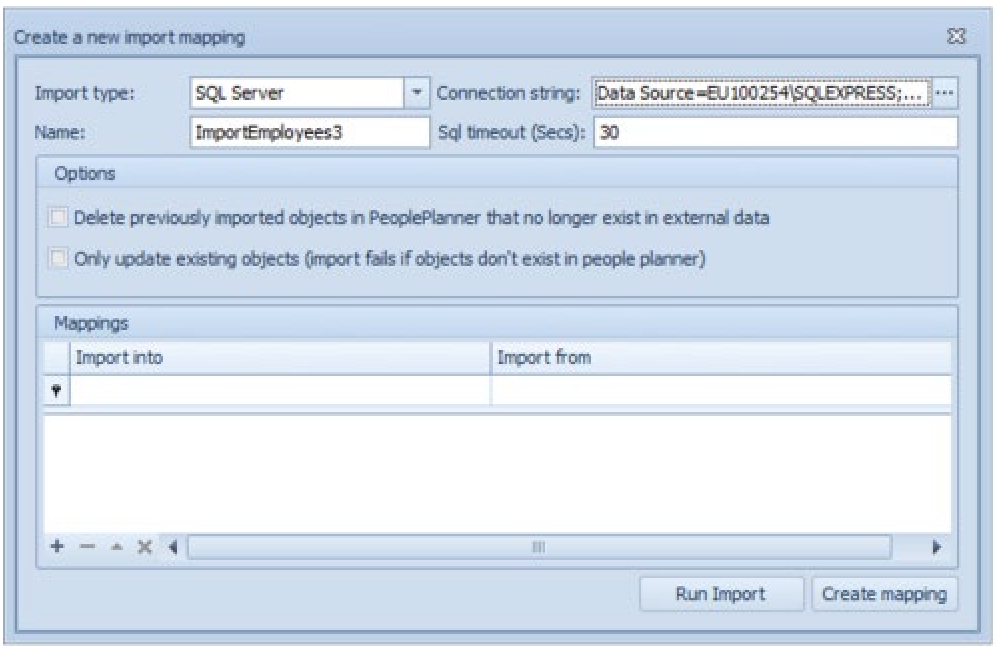
3. Click the **…** button to the right of the **Connection String** field to open the Connection String dialog.
4. Enter the names of the server and database for the database from which you want to import data in the **Server** and **Database** fields, respectively.
5. Choose **Database** from the drop-down list for the **Authentication** field.
6. Enter the user name and password in the **Username** and **Password** fields, respectively.



Note: Oracle is the same, except that the Connection String dialog looks slightly different.

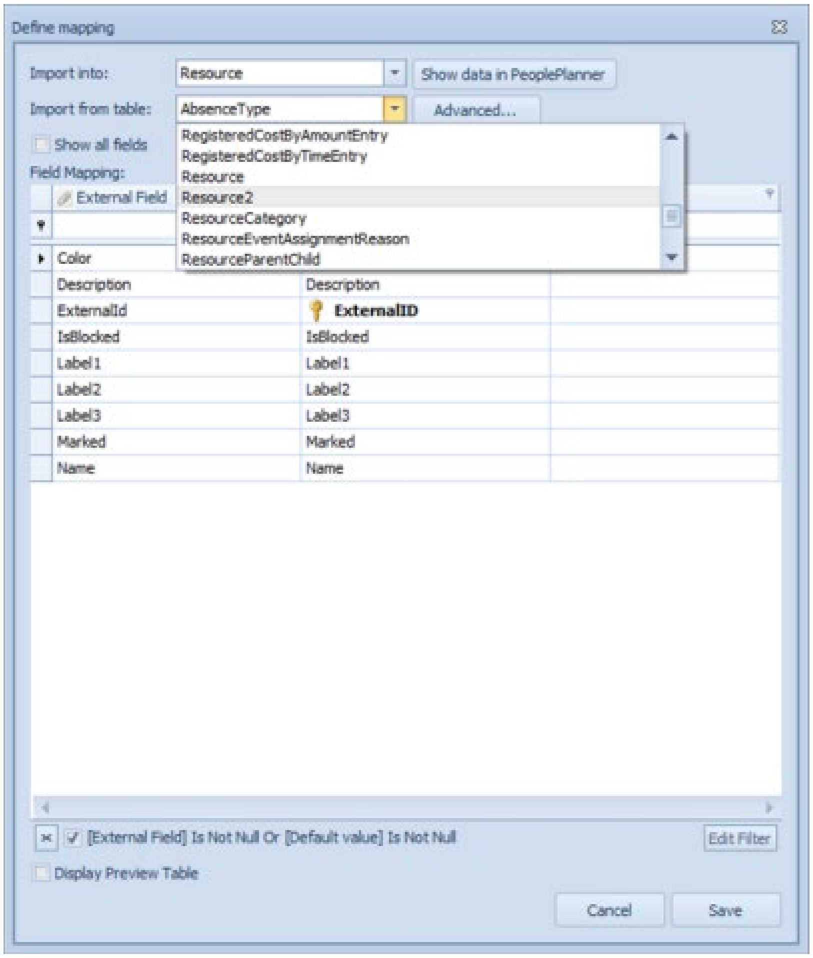


7. Click the **OK** button to save the connection string.

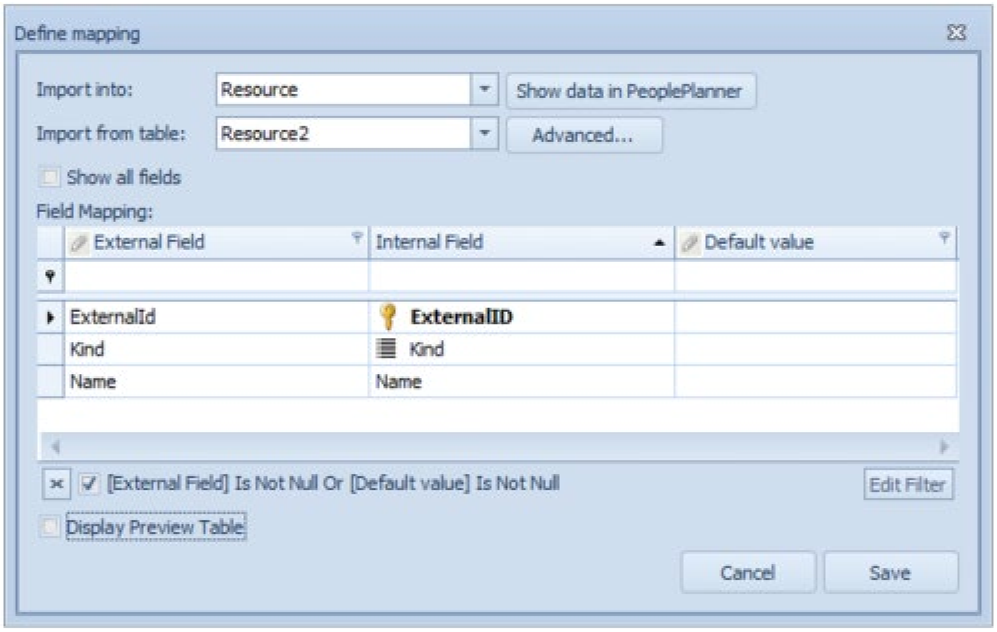


8. Click the **+** button near the lower-left corner of the view to open the Define Mapping view.
9. Choose the People Planner table into which you want to import the external data from the drop-down list for the **Import into** field. In this example, this is Resources » Resource.

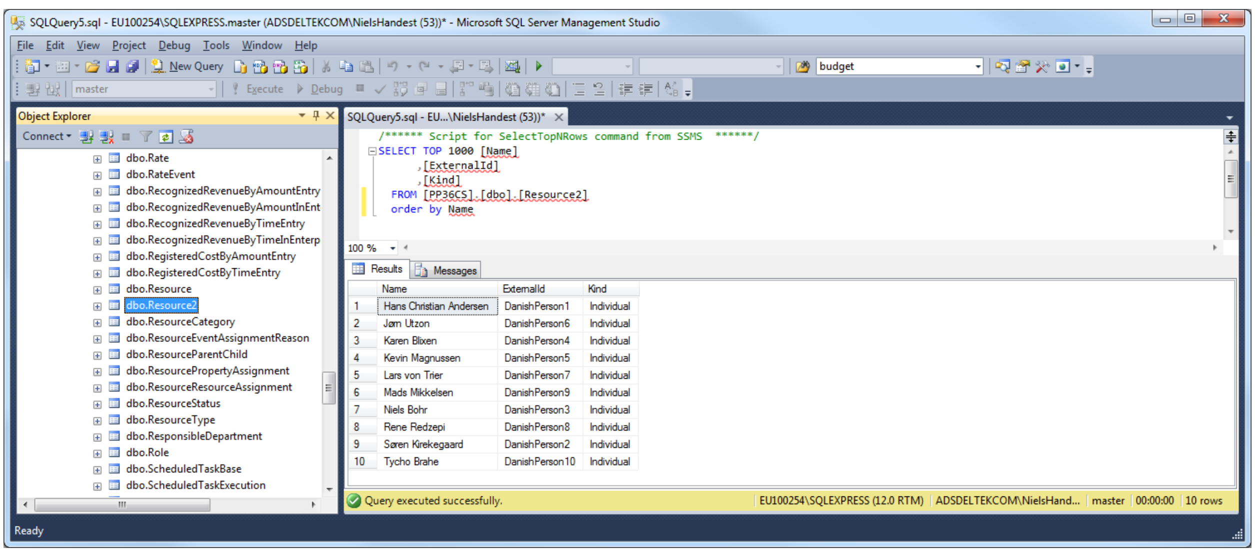
10. Click the down-arrow next to the **Import from table** field to browse to see which tables are available in the external database, then choose the table from which you want to import the data.



When you have chosen the table, the view displays the suggested mapping.



In this example, there are only the columns available in the Reource2-table, and there is therefore not any need to use the **Show all Fields** checkbox. As in the previous examples, you must ensure that the mapped columns exist in the external table.

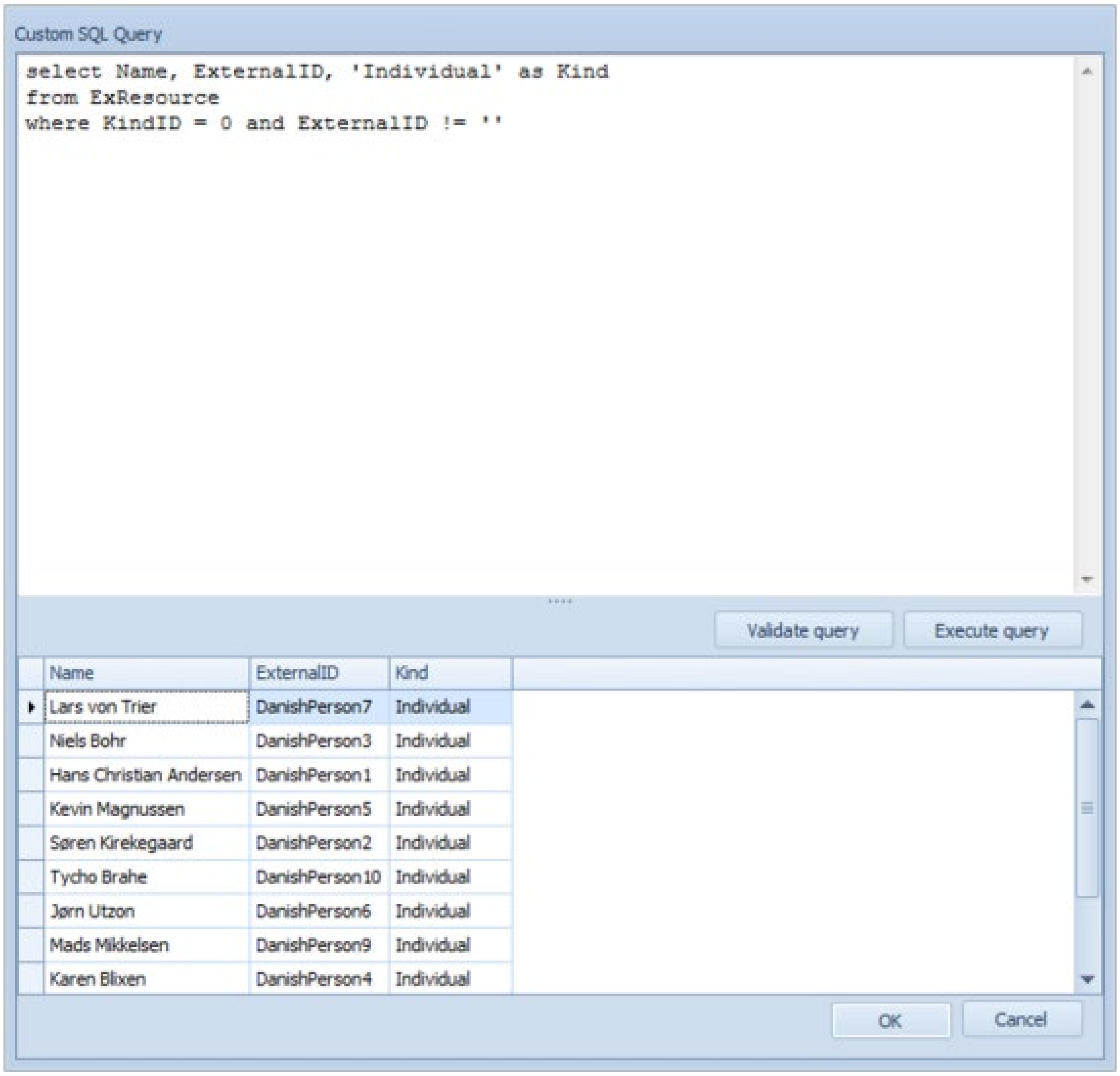


Custom SQL Query

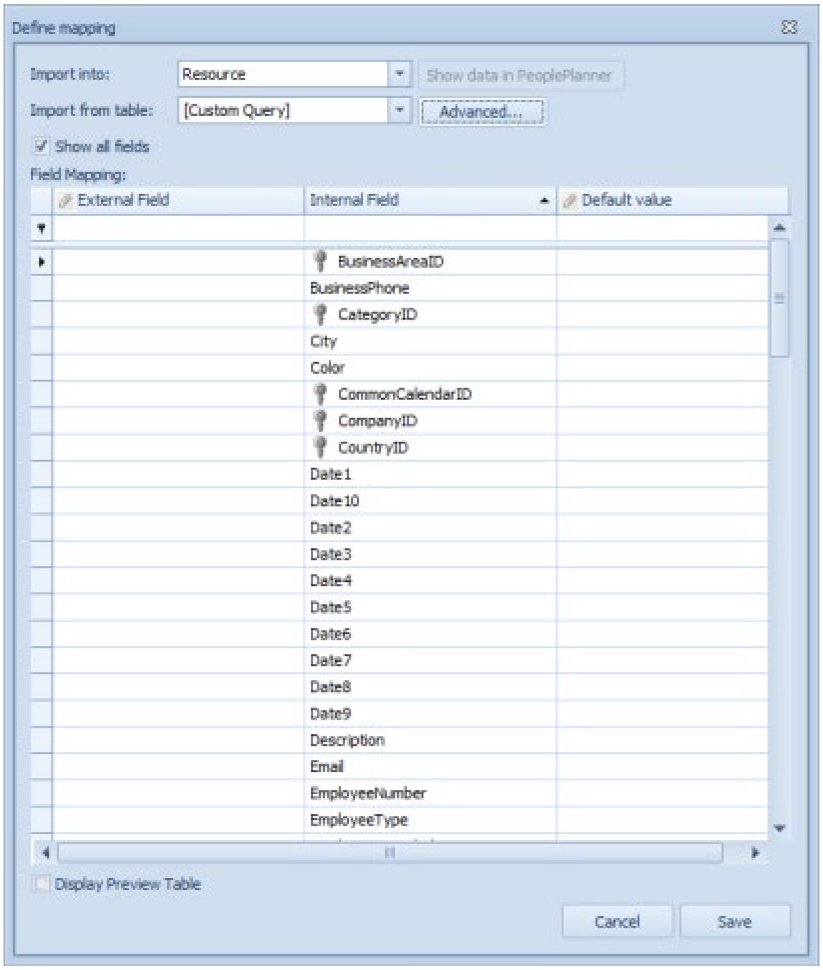
When creating an SQL-based Import Mapping—that is, SQL Server or Oracle—you are required to choose a table for the external database. An alternative to this is to base the import on a Custom SQL Query instead.

In the Define Mapping view, click the Advanced button instead of selecting a table in the **Import from table** field. This opens the Custom SQL Query view.

You can now start composing an SQL query. To see the result, click the **Execute Query** button.



When you are satisfied with the result, click the **OK** button to return to the Define Mapping view.



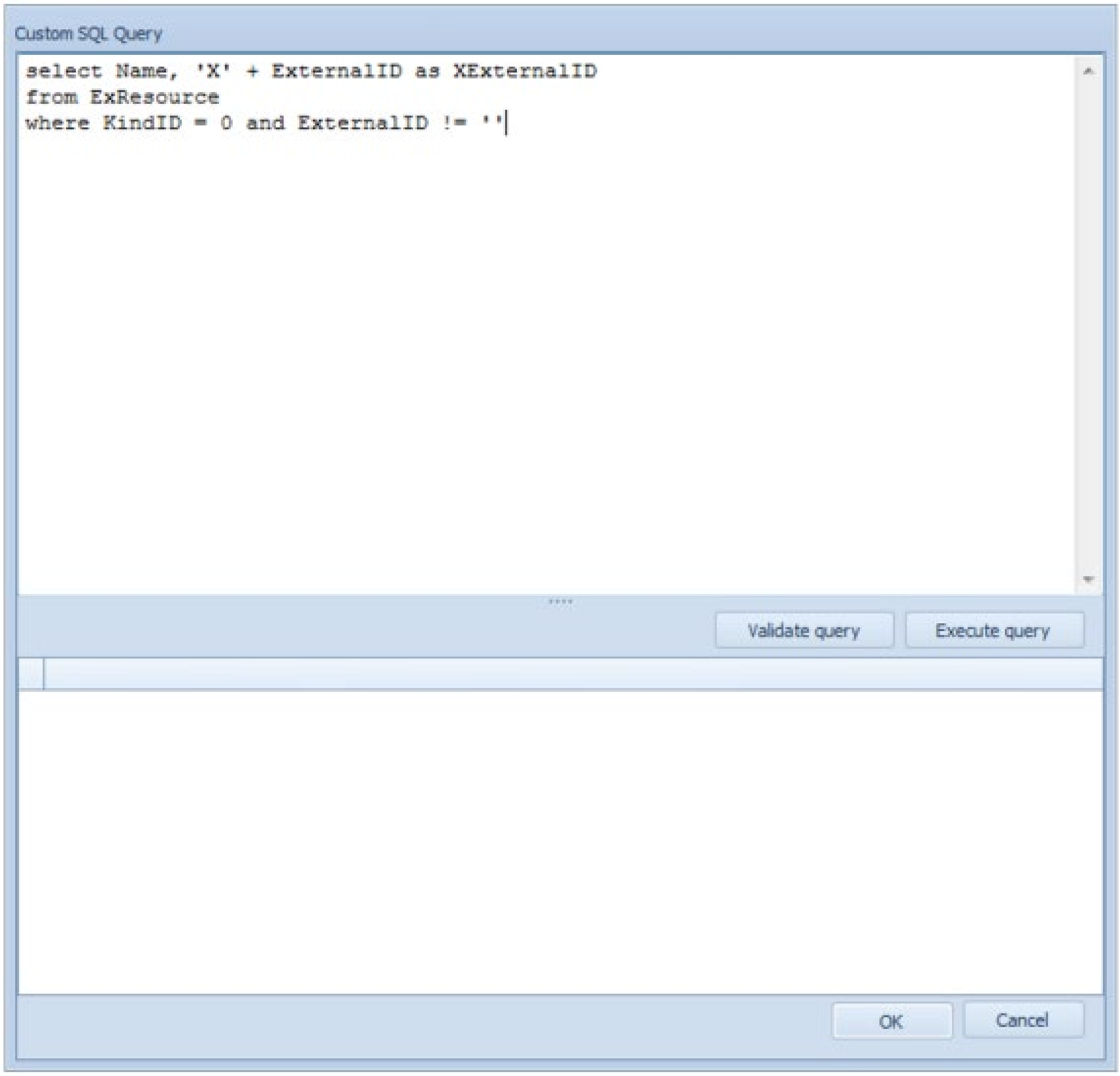
From there, the steps are the same as described in Import from SQL Server and Oracle.

Customize the Mapping of Fields

The examples so far have relied on the fact that the mandatory columns were already there, and that they had the exact same names in both the External Field and Internal Field columns.

When People Planner compares the format of the import source with the table into which data will be imported; it tries to map each External Field with an Internal Field. This may not always be possible because the External Field might have a different name or because it was not even there.

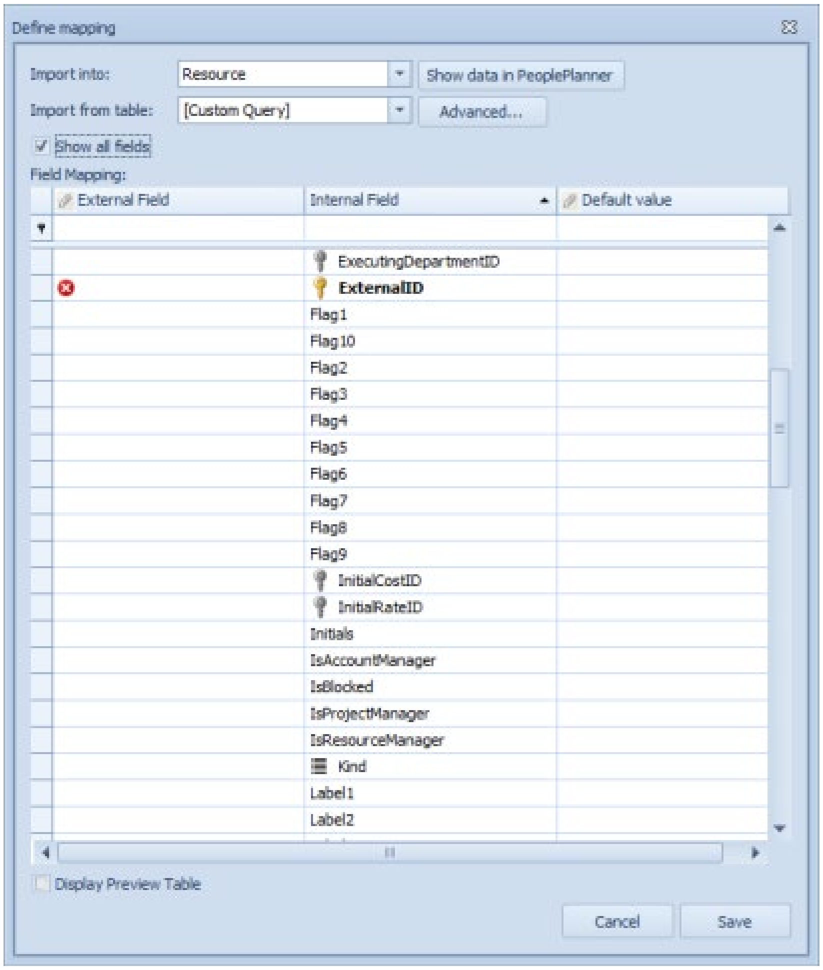
Consider the Custom SQL Query shown in the following figure.



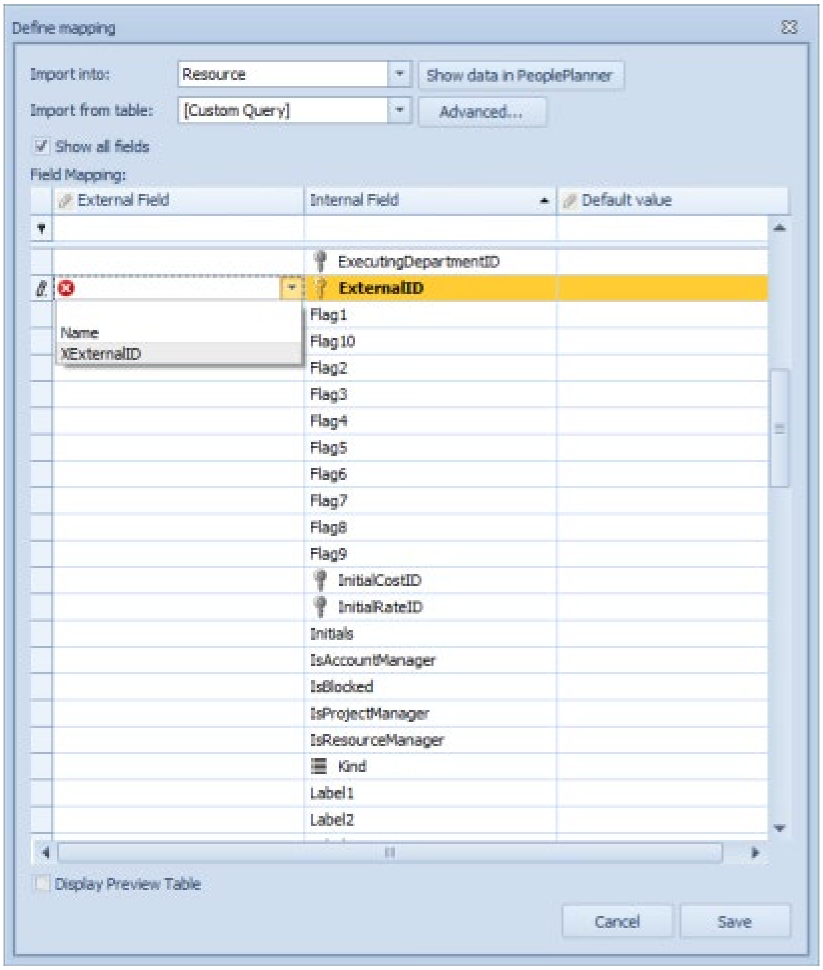
The import needs three mandatory fields: **Name**, **ExternalID**, and **Kind**. With the preceding Custom SQL Query:

- The Name field is there.
- The ExternalID-field is there, but it is called XExternalID.
- The Kind field is missing altogether.

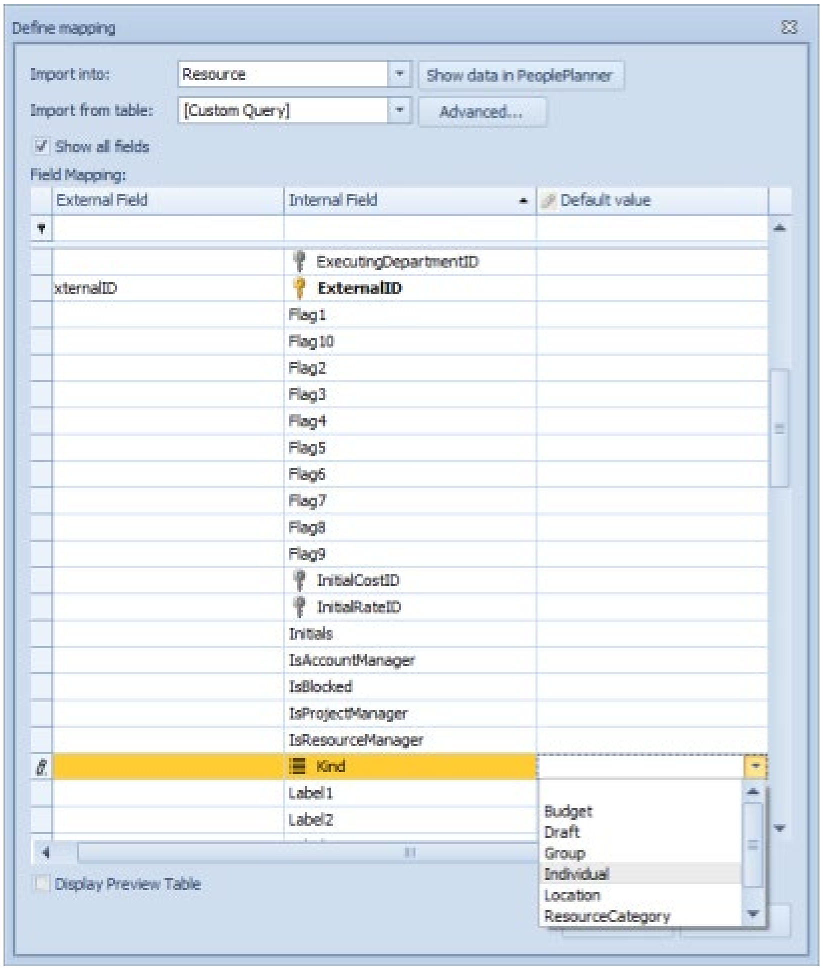
Because the names are different, People Planner has trouble mapping the XExternalID field to ExternalID.



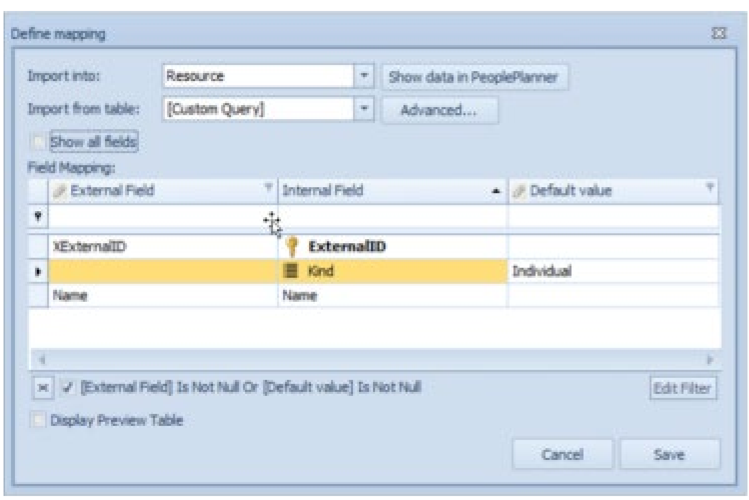
You map the XExternalID field to ExternalID by selecting the field from the drop-down list for the **External Field** column.



The Kind field was left out of the SQL statement because it was a constant anyway. Instead, you can set it using the **Default Value** column:



The result looks like the following figure.



When you define a mapping, there are some special types of fields to consider, as described in the following table.

Type	Description
	Whenever a field in the Define Mapping view is displayed with a red cross icon, it means that this field is mandatory and must be mapped before you can import the data.
ExternalID	The External ID column is mandatory in all imports. This is the unique key that is used in the People Planner database.
Popup1ID	Fields shown with the silver key icon are foreign keys in People Planner. Whenever you import data to a foreign key you must make sure that the value that you set in your import actually exists in People Planner in the field. For example, if you import to Popup 1 on the resource you must make sure that the value that you set for a resource in the Popup 1 field is also created in the resource popup 1 field.
Kind	If you import data to a field that has this icon—known as the List icon—it means that the field contains a list of values. The list of values is determined in the People Planner code, and you cannot change the number of values in the list or rename the existing values. When importing to these kinds of fields you must make sure that the value that you import also exists in the list of values for this system field.

Example

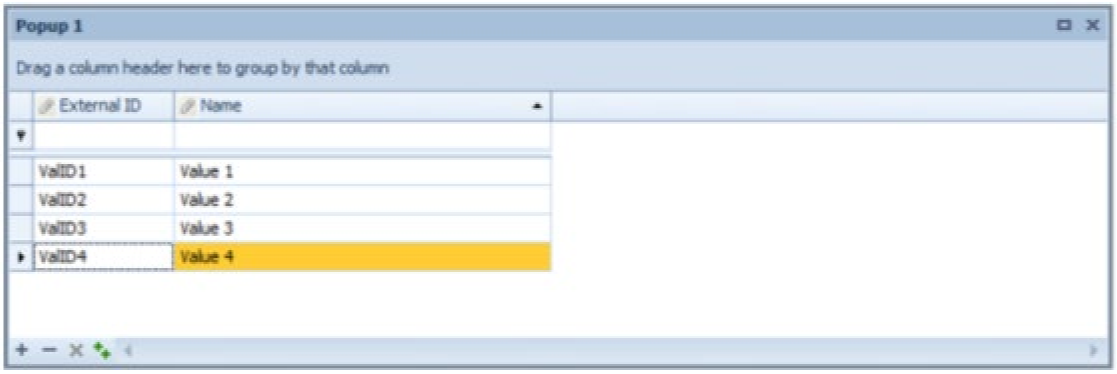
Assume that you want to import data into the **Popup 1** column in the Resource view. In the Import Mapping, this is the field named **Popup1ID**, and it has a silver key icon.

Before you can link a resource with a value in Popup 1, it must already exist in the People Planner database. The normal way to ensure this would be to import the Popup 1 data before you import the resources. In this example, you will create them manually.

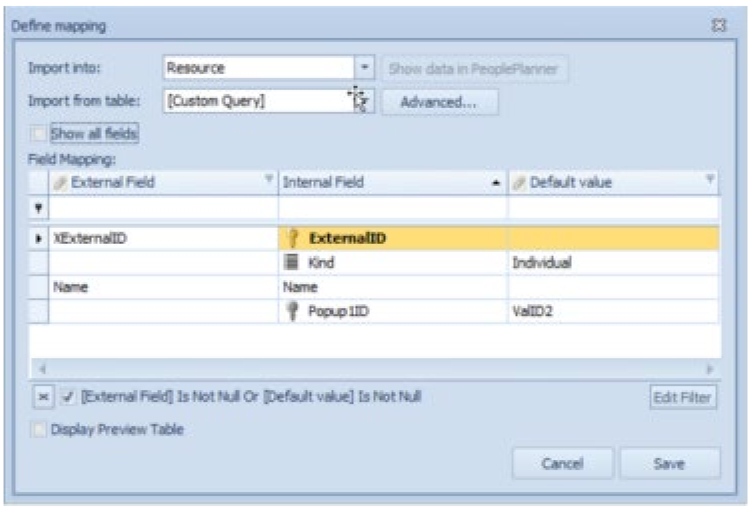
To do this, complete the following steps:

1. Navigate to **Views » Resources » Parameters » Resource Popup**.
2. Open the Popup 1 view.
3. Add the **External ID** column to the grid.

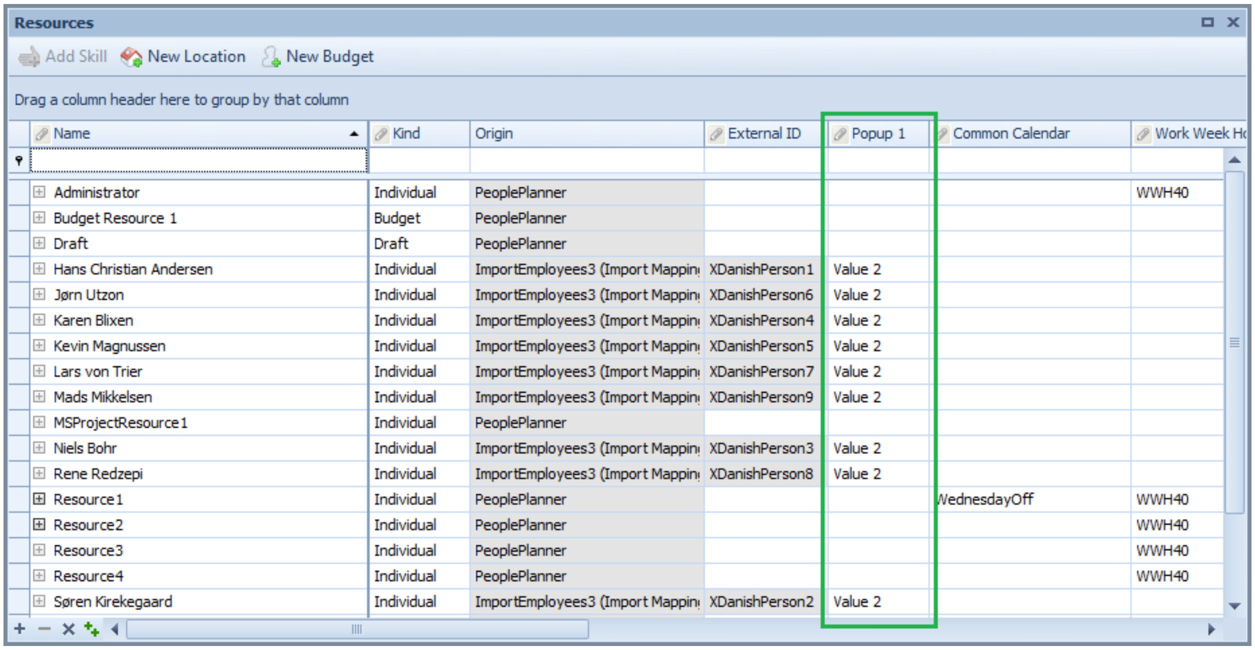
4. Add some values. The External ID must be unique and not empty, but the Name column can have duplicates.



When you create the Import Mapping, you then import the value of the External ID from the Popup 1 table into the **Popup1ID** column.



When you run this Import Mapping, the Popup 1 is populated with the Name values from the Popup 1 view.



Name	Kind	Origin	External ID	Popup 1	Common Calendar	Work Week Ho
Administrator	Individual	PeoplePlanner				WWH40
Budget Resource 1	Budget	PeoplePlanner				
Draft	Draft	PeoplePlanner				
Hans Christian Andersen	Individual	ImportEmployees3 (Import Mappin	XDanishPerson1	Value 2		
Jørn Utzon	Individual	ImportEmployees3 (Import Mappin	XDanishPerson6	Value 2		
Karen Blixen	Individual	ImportEmployees3 (Import Mappin	XDanishPerson4	Value 2		
Kevin Magnussen	Individual	ImportEmployees3 (Import Mappin	XDanishPerson5	Value 2		
Lars von Trier	Individual	ImportEmployees3 (Import Mappin	XDanishPerson7	Value 2		
Mads Mikkelsen	Individual	ImportEmployees3 (Import Mappin	XDanishPerson9	Value 2		
MSProjectResource1	Individual	PeoplePlanner				
Niels Bohr	Individual	ImportEmployees3 (Import Mappin	XDanishPerson3	Value 2		
Rene Redzepi	Individual	ImportEmployees3 (Import Mappin	XDanishPerson8	Value 2		
Resource1	Individual	PeoplePlanner			WednesdayOff	WWH40
Resource2	Individual	PeoplePlanner				WWH40
Resource3	Individual	PeoplePlanner				WWH40
Resource4	Individual	PeoplePlanner				WWH40
Søren Kirekegaard	Individual	ImportEmployees3 (Import Mappin	XDanishPerson2	Value 2		

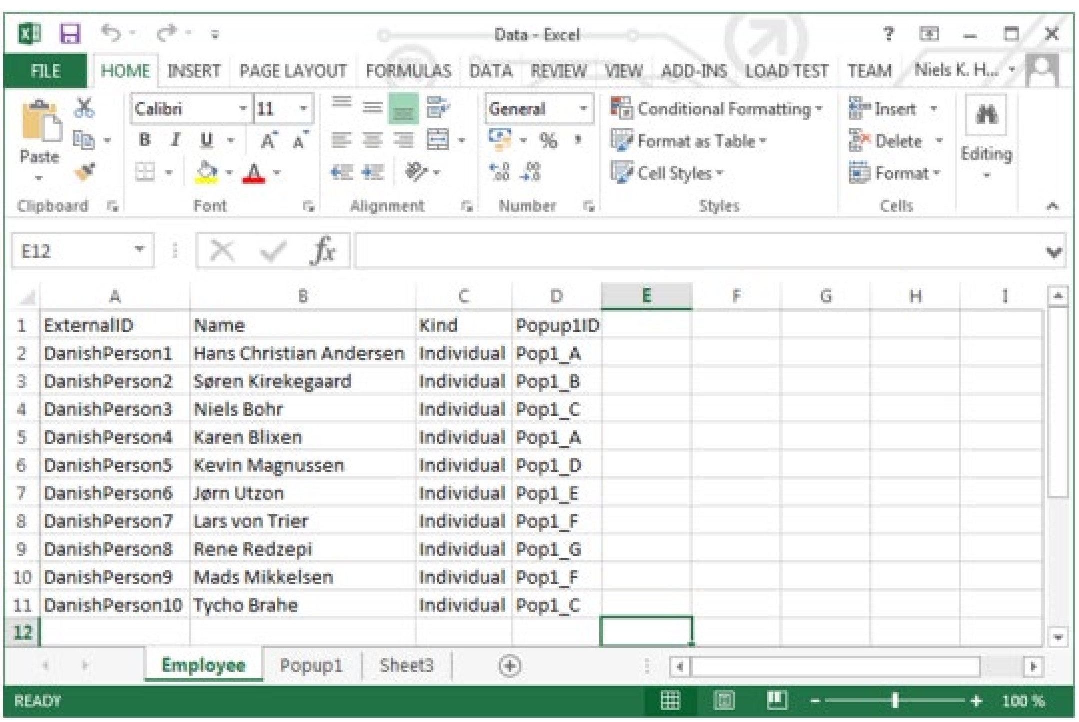
Add Multiple Mappings

You can add more than one mapping in an Import Mapping. An instance where you can use this is if the Excel file has multiple tabs, and you want to import data from each of them.

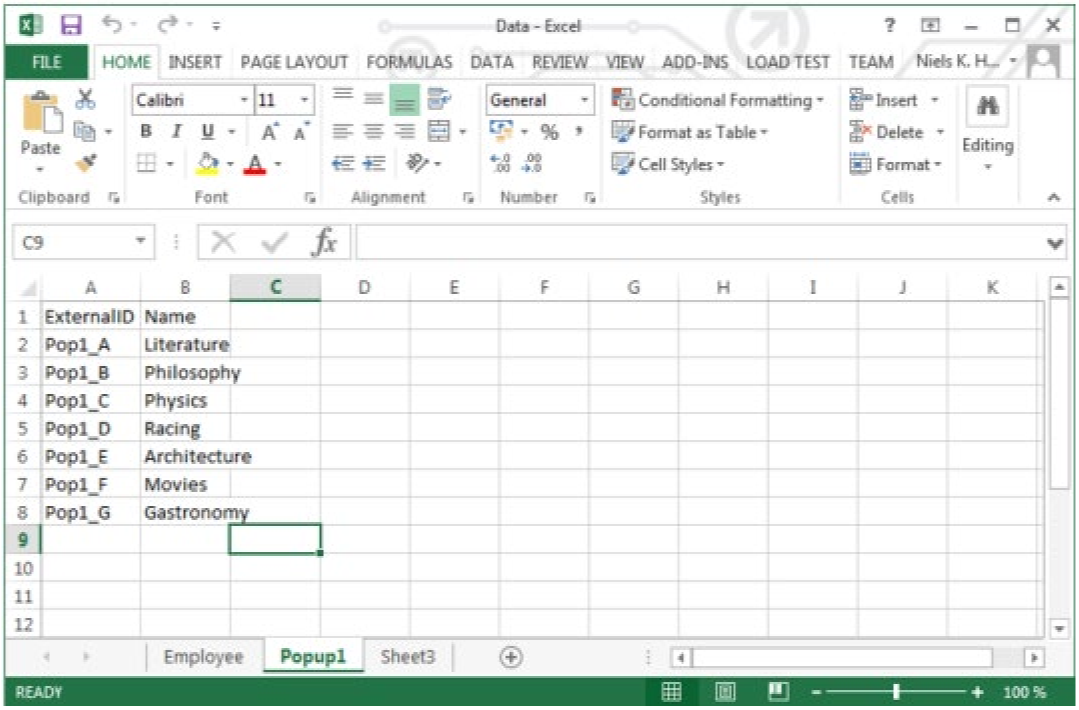
You add each mapping by clicking the + button near the lower-left corner of the Import Mapping.

Example

The file Data.xlsx has two tabs with data, Employee and Popup1.



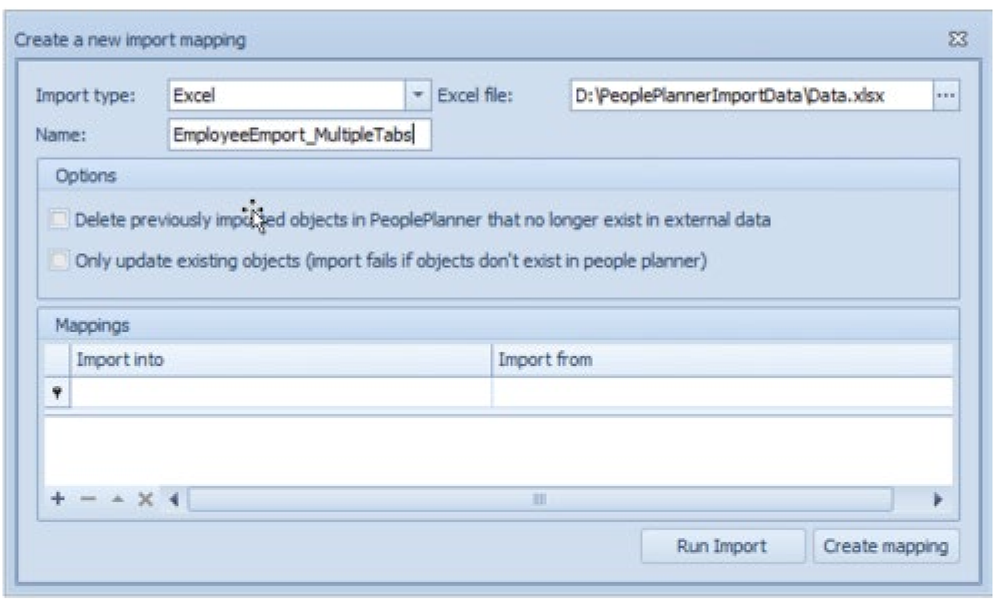
	A	B	C	D
1	ExternalID	Name	Kind	Popup1ID
2	DanishPerson1	Hans Christian Andersen	Individual	Pop1_A
3	DanishPerson2	Søren Kirekegaard	Individual	Pop1_B
4	DanishPerson3	Niels Bohr	Individual	Pop1_C
5	DanishPerson4	Karen Blixen	Individual	Pop1_A
6	DanishPerson5	Kevin Magnussen	Individual	Pop1_D
7	DanishPerson6	Jørn Utzon	Individual	Pop1_E
8	DanishPerson7	Lars von Trier	Individual	Pop1_F
9	DanishPerson8	Rene Redzepi	Individual	Pop1_G
10	DanishPerson9	Mads Mikkelsen	Individual	Pop1_F
11	DanishPerson10	Tycho Brahe	Individual	Pop1_C



When you import this file, you must import the Popup1 entries before the Employee entries.

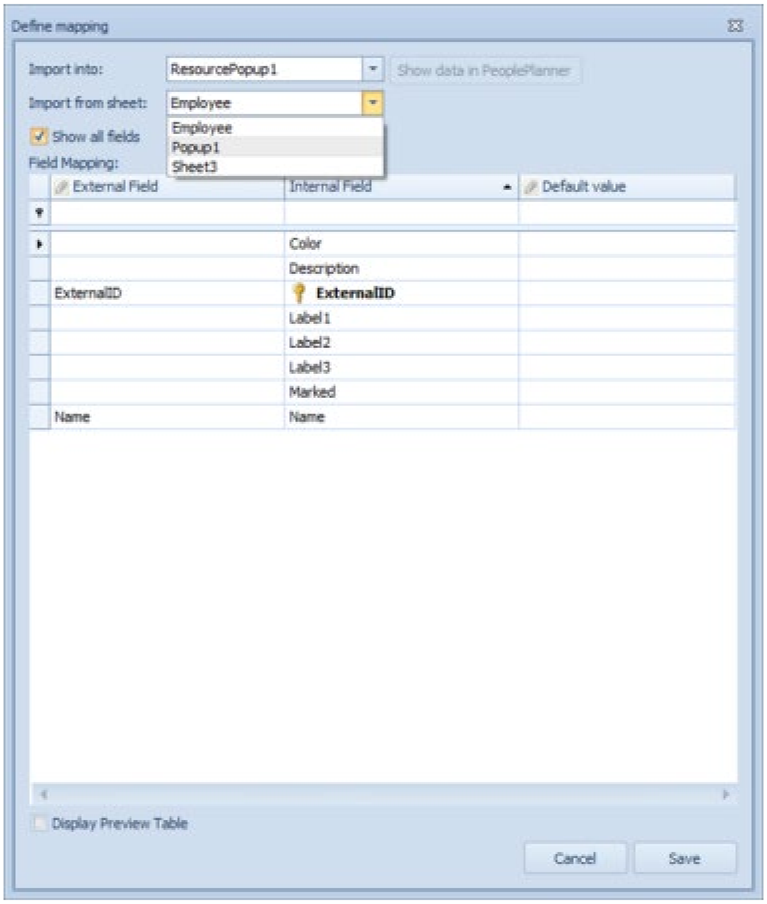
To do this, complete the following steps:

1. Create an Import Mapping.

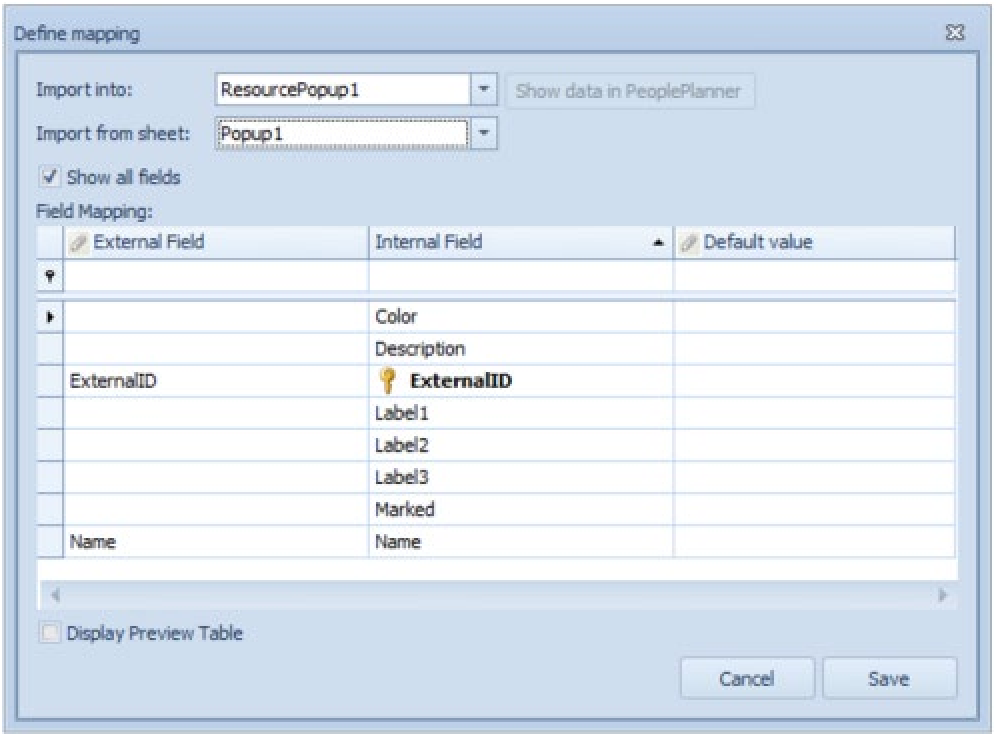


2. Click the **+** button in the lower-left corner to add a mapping.
3. Choose **Resources** » **Parameters** » **Resource Popups** » ResourcePopup1 in the **Import into** field.

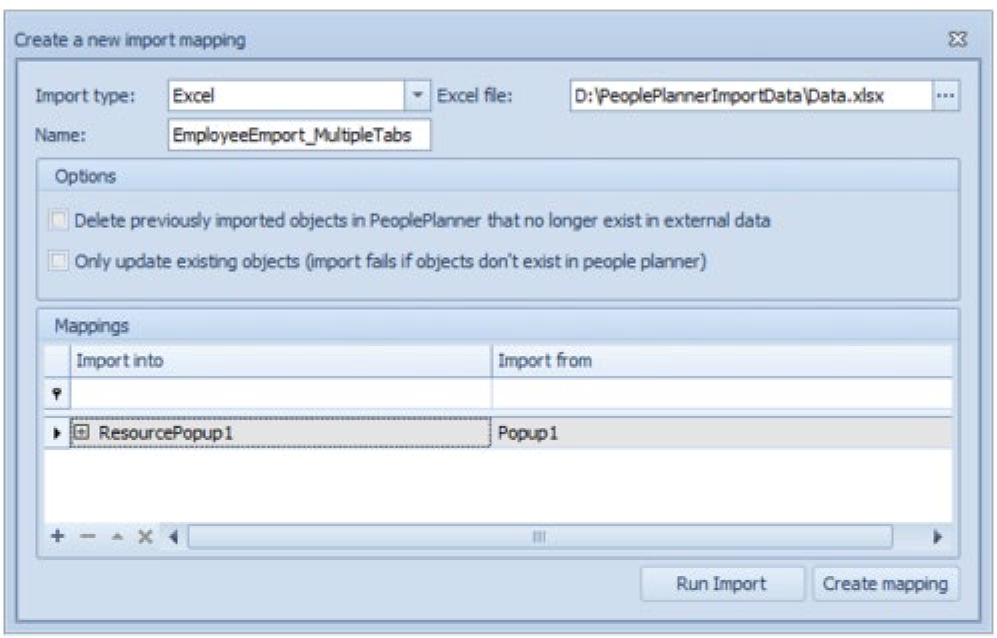
4. Choose the **Popup1** tab in the **Import from sheet** field.



The resulting mapping should show the ExternalID and the Name columns being mapped.



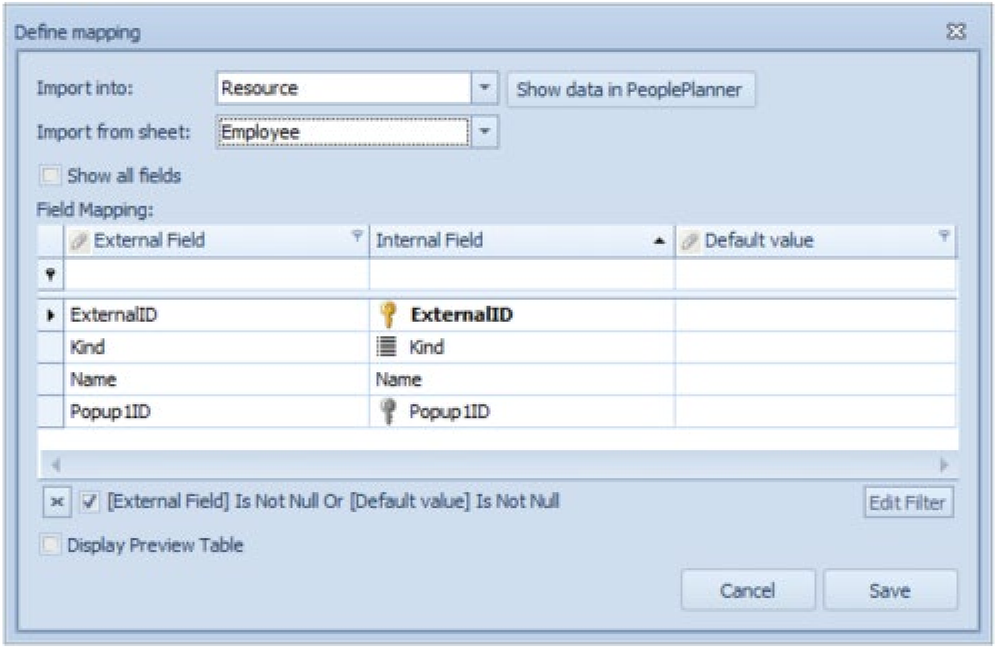
5. Click the **Save** button.



You have now created the first mapping. To add a second mapping you must continue with the following steps.

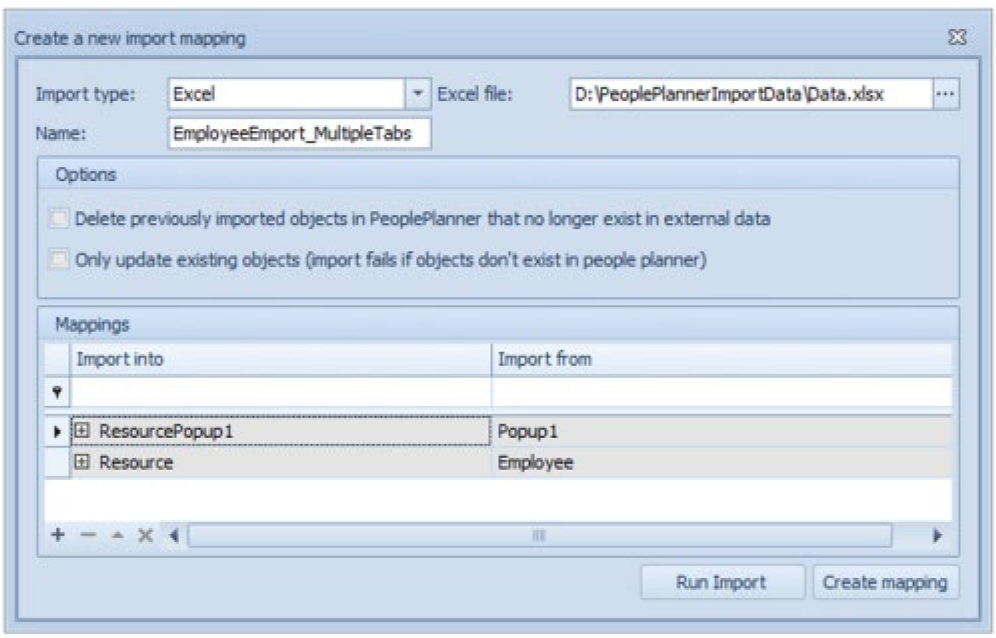
6. Click the **+** button again.
7. Choose **Resources » Resource** in the **Import into** field.

8. Choose the **Employee** tab in the **Import from sheet** field.



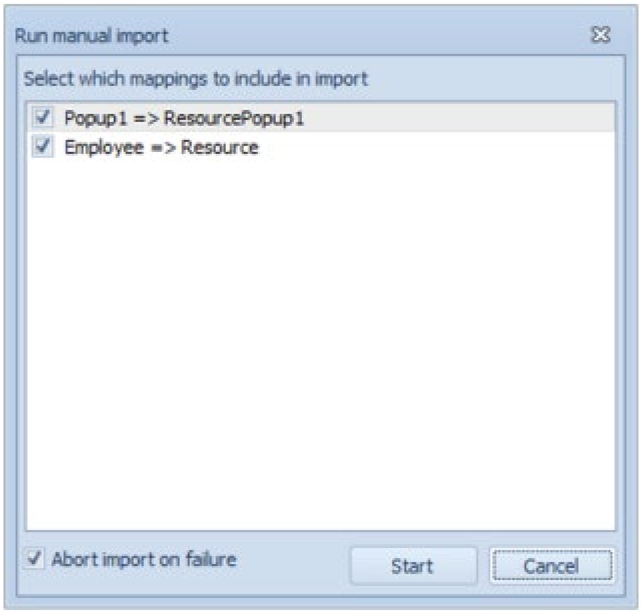
9. Click the **Save** button.

   You have now created a second mapping.

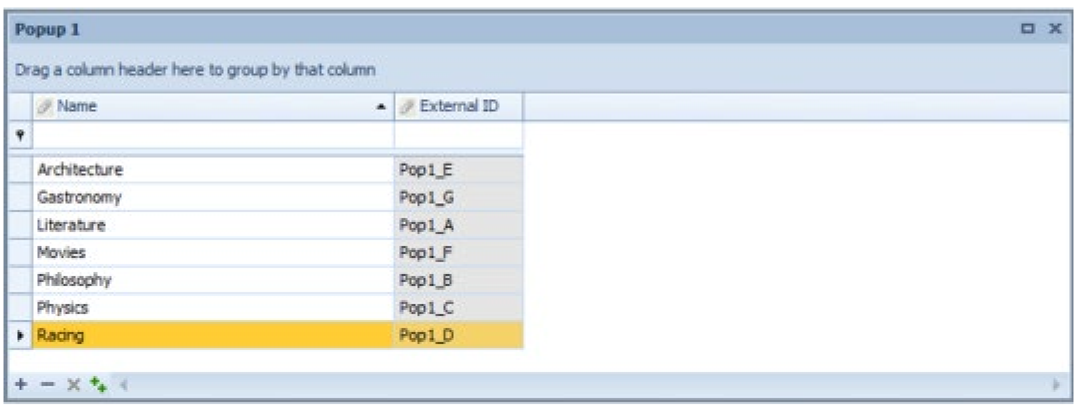


10. Click the **Create Mapping** button to save the Import Mapping.

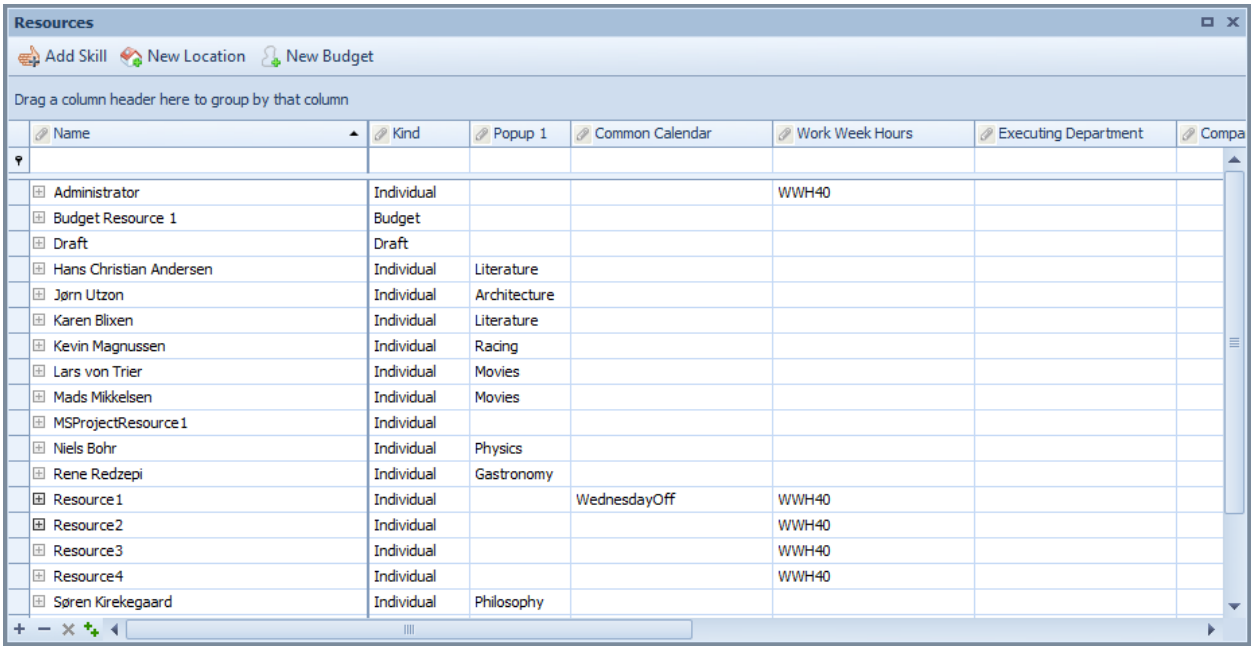
The order of the mappings is important. When you run the Import Mapping, the individual mappings are run in the order in which they appear.



The result of this import mapping is that you have imported rows into the Popup1: Views » Resources » Parameters » Resource Popup » Popup 1.



Similarly, rows have been added in the Views » Resources » Resources view, and if you add the Popup 1 column, the popups are seen as well.



Name	Kind	Popup 1	Common Calendar	Work Week Hours	Executing Department	Compa
Administrator	Individual			WWH40		
Budget Resource 1	Budget					
Draft	Draft					
Hans Christian Andersen	Individual	Literature				
Jørn Utzon	Individual	Architecture				
Karen Blixen	Individual	Literature				
Kevin Magnussen	Individual	Racing				
Lars von Trier	Individual	Movies				
Mads Mikkelsen	Individual	Movies				
MSProjectResource1	Individual					
Niels Bohr	Individual	Physics				
Rene Redzepi	Individual	Gastronomy				
Resource1	Individual		WednesdayOff	WWH40		
Resource2	Individual			WWH40		
Resource3	Individual			WWH40		
Resource4	Individual			WWH40		
Søren Kirekegaard	Individual	Philosophy				

You can add as many mappings as you need.

The preceding example is with an Excel file, but the multiple mappings can be used for the other types of import as well; for example, you can select multiple CSV files in the CSV Files(s) field and then create a mapping for each of them.

Changes in the External Data

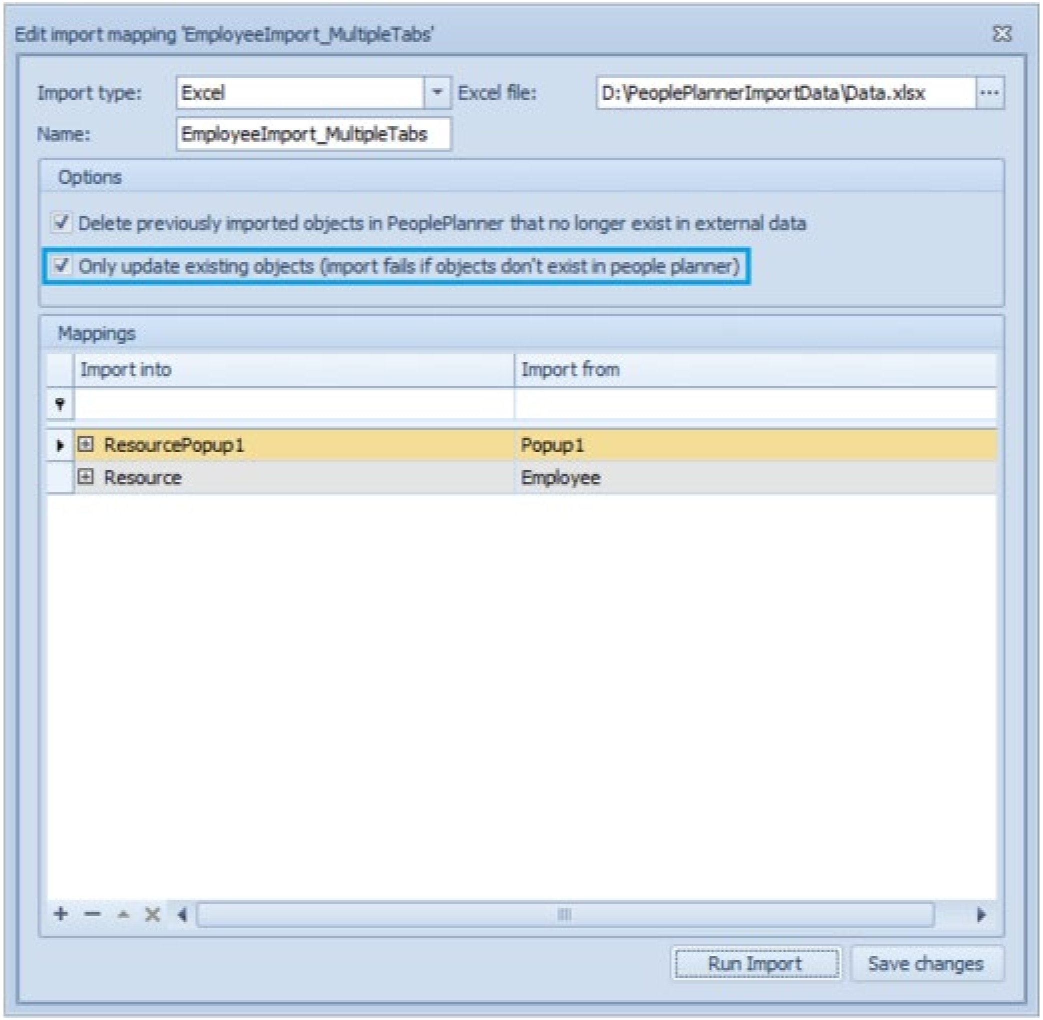
The external data may change between imports. This can happen in three ways:

1. Data was added — A row that was not in the file at the previous import has been added; for example, a new employee has joined the company.
2. Data was deleted — A row that was in the file at the previous import has been removed; for example, an employee has left the company.
3. Data was updated — A row that was in the file at the previous import is still there, but has been changed in some way since the previous import; for example, an employee has changed his or her name.

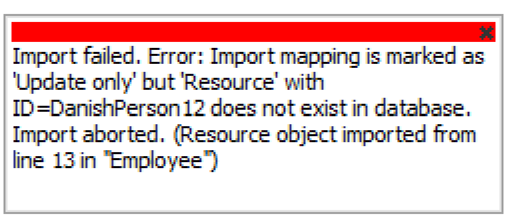
Data was Added

In this case, People Planner simply adds the new data the next time that you run the import.

This is the default behavior, but you can change it by selecting the **Only update existing objects (import fails if objects don't exist in People Planner)** checkbox. You select/deselect this checkbox as part of defining the Import Mapping.



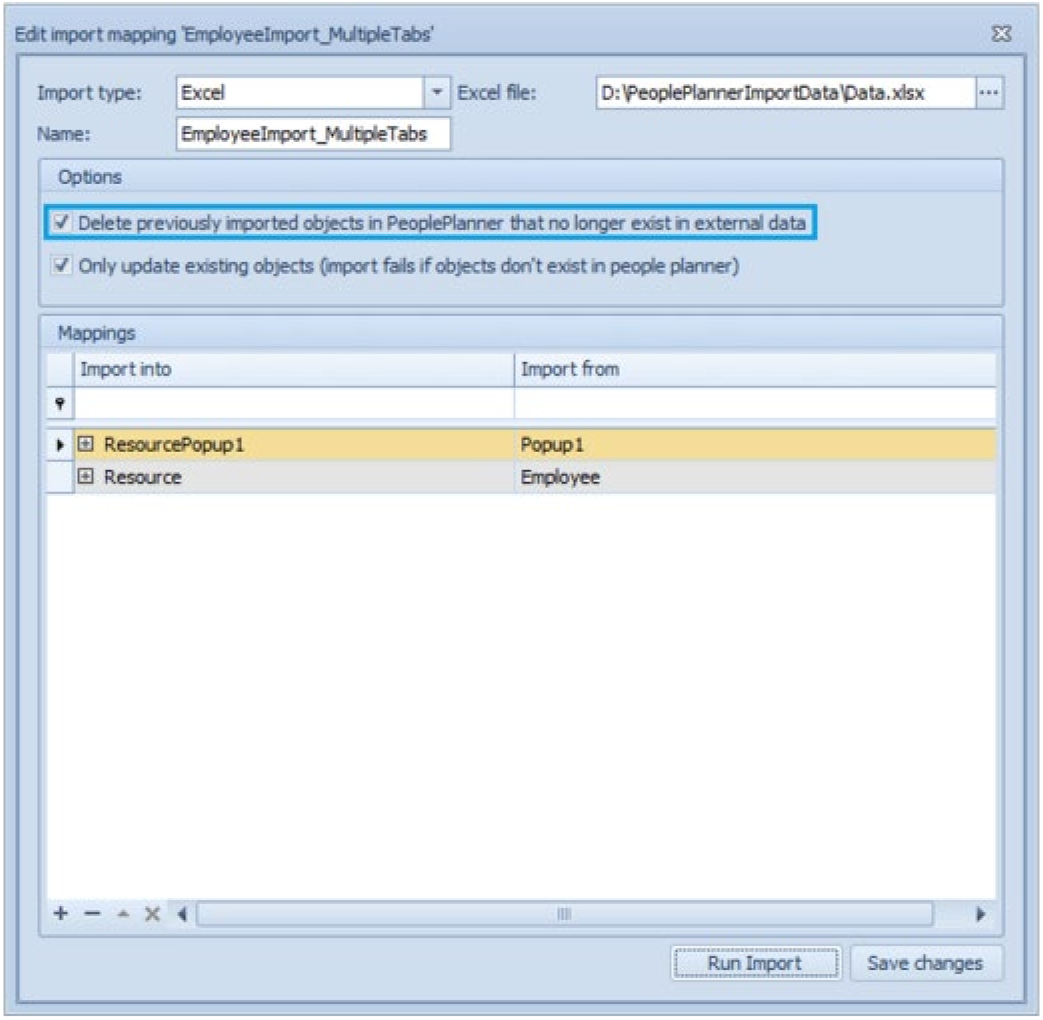
If this checkbox is selected, and you run the import after new external data has been added, People Planner reports this as an error:



Data was Deleted

By default, existing data is not deleted as part of an import mapping. Any data that has been imported into People Planner once remains, even if it is not in the external source anymore.

You can change this behavior by selecting the **Delete previously imported objects in PeoplePlanner that no longer exist in external data** checkbox. You select/deselect this checkbox as part of defining the Import Mapping.



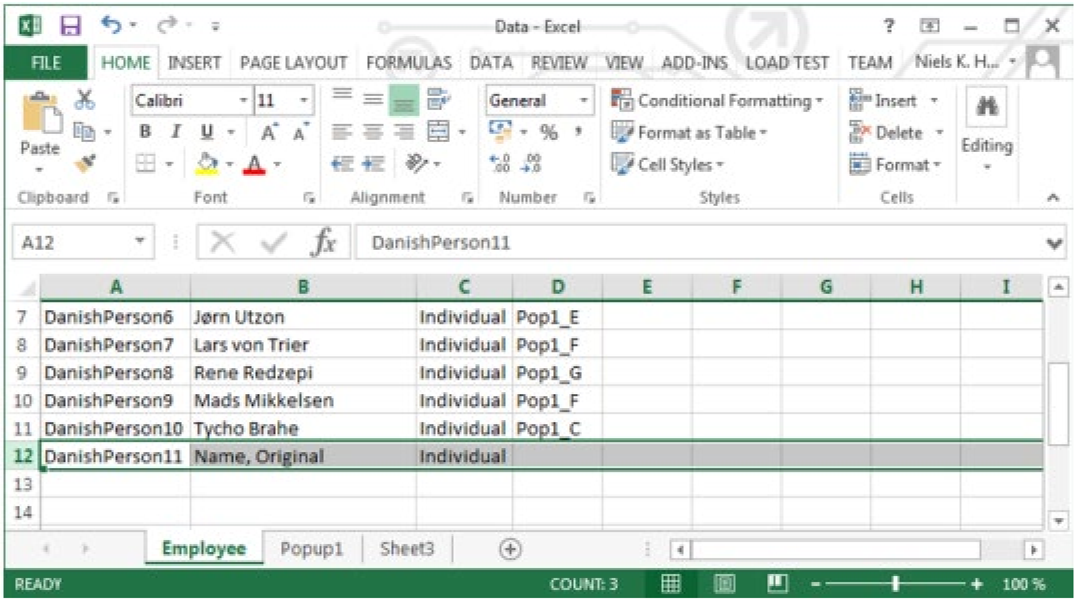
Note: Only data that was previously imported though the Import Mapping is deleted. People Planner does not delete data with a different Origin.

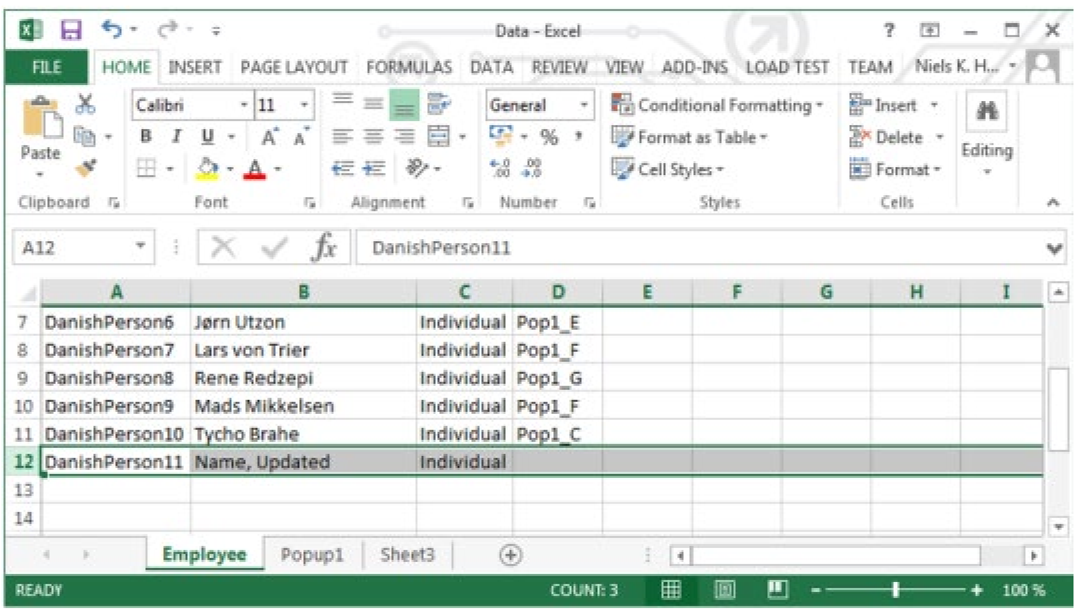
Data was Updated

People Planner identifies the external data from the External ID. As long as the External ID does not change, the rest of the data is allowed to change. When you run the import the next time, People Planner updates the data from the previous import.

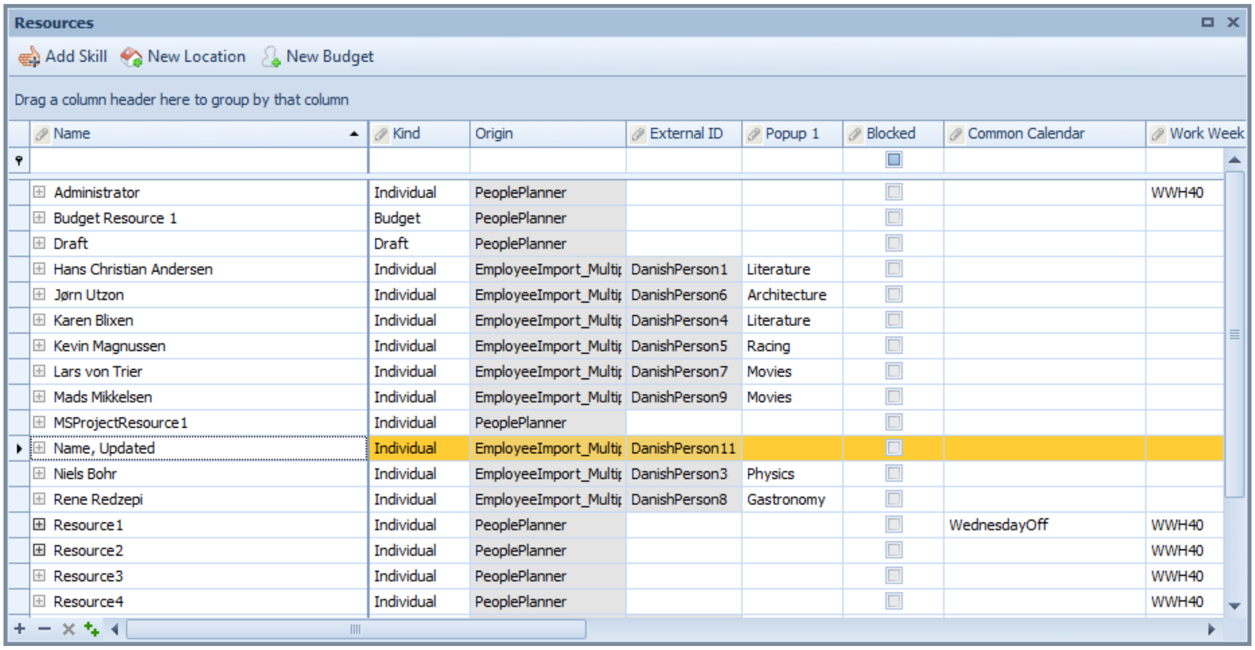
Example

The External ID is kept the same, but the name is changed.





The following figures shows the updated Resource.



Determine the Format of the External Data

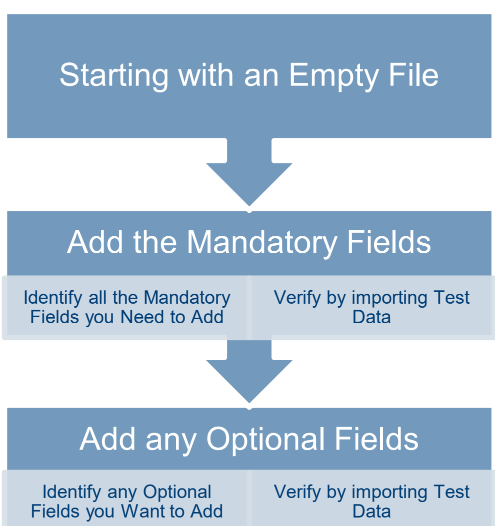
If you want to create an Import Mapping, you must start with a source with external data, such as an Excel file. If you do not have this, you cannot create the mapping.

- At the very least, you must define which columns the Excel file should contain.
- It is also a good idea to have some actual data in the file.

However, this poses practical problems when:

- You do not yet know which fields you must import.
- The export functionality that creates the file does not yet exist.

Fortunately, People Planner allows you to use an empty Excel file. Using an empty file, you can proceed to the point where you can identify the fields to add.



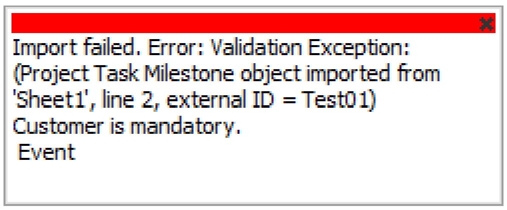
Adding New Fields

When you are in the process of defining an Import Mapping, and you specify a file with external data, People Planner loads the file. People Planner does this to be able to map the fields and to show the preview data from the file.

If you decide that you need to add a new column to the file, there is no easy way to force People Planner to reread the file. Instead, you must save the incomplete Import Mapping and close the editing dialog. You can then open the Import Mapping again by editing it. This forces People Planner to read the file again, and it then discovers the new columns and test data.

Identifying the Mandatory Fields

Mandatory fields are recognizable by the icon. However, a few of the mandatory fields lack this icon, and the only way to identify them is to try out the import; any mandatory field that is missing results in an error-message.



Verifying using Test Data

You should always verify that the Import Mapping works as intended by importing some data. If you do not already have real data available, you can try to create some test data and use that.

Using test data can also be a useful tool if you are not sure about the format:

- Numbers — Should you use decimal points or commas?
- Dates — Should you use the “mm/dd-yyyy” or the “dd/mm-yyyy” format?

The various data types are discussed next.

Data Types

Data in People Planner can be of different types, and the source with the external data must consider this.

This is especially the case when the external data is stored as a CSV file. The content of a CSV file is pure text, and the Import Mapping must know how to translate the text into the relevant data type.

Example

If the target data type is a date, and the text is “02-09-2016,” the import must know if this was stored in “dd-mm-yyyy” or “mm-dd-yyyy” format.

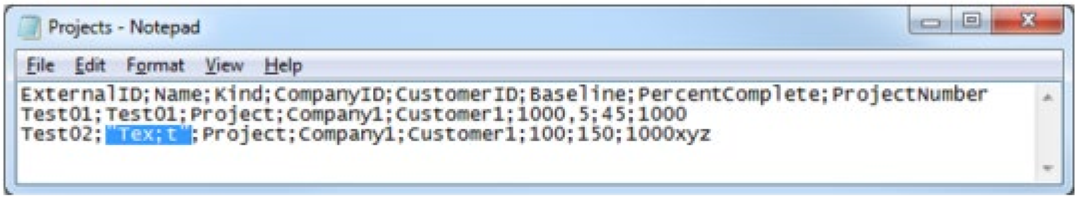
The data types are:

- Text
- Numbers
- Checkboxes/flags
- Dates
- LookUps

Text

Many fields in People Planner are of the text type. Some examples are the name of a resource or a project. You can normally import text fields directly without any issues.

An exception to this is if the external file is a CSV file. In a CSV file the individual columns are divided by a dedicated delimiter character such as a semicolon (;) or a comma (,). If the delimiter happens to be included in the text field, the usual solution is to place the text inside quotation marks, as the following example shows.



Some fields may appear to be a number, but are actually a text field. An example of this is the Project Number. People Planner does not care if the data has been stored as text or number format—for example in Excel—and imports the field just fine.

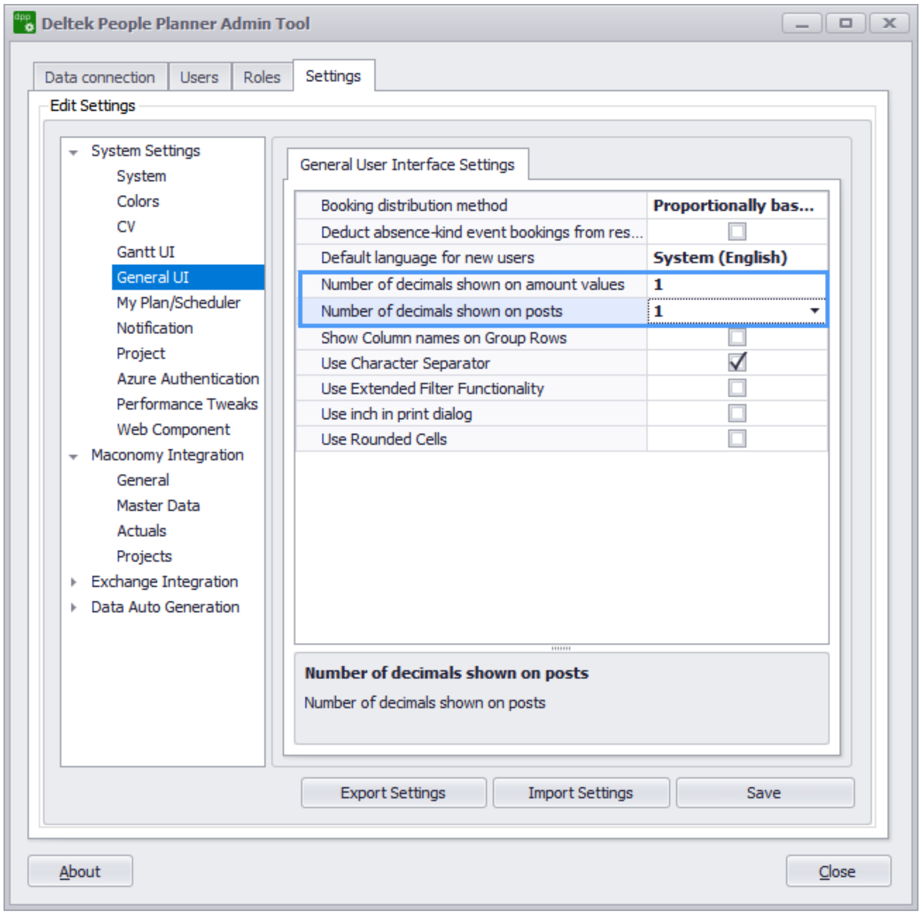
If the external source is a CSV file, encoding can be an issue. See Import from a CSV File for more details.

Number

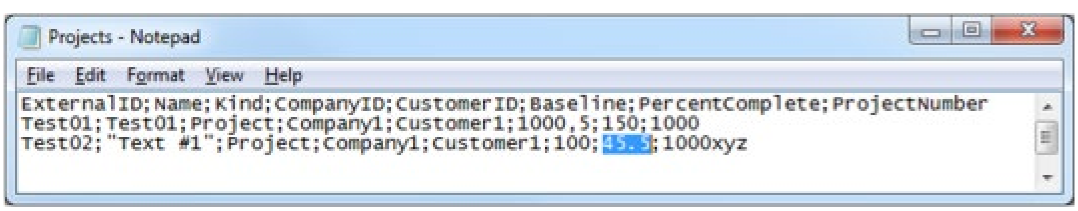
Number fields in People Planner can be of two types: Integer fields and Decimal Number fields.

Note: There is no easy way to verify whether a Number field is of the type Integer or Decimal Number. A tip is to change the People Planner setting for how many decimals to show, and set it to 1.

A Decimal Number field can then show numbers like 45.5, whereas an Integer field cannot show any decimals.



In the following example, the Baseline field is a Decimal Number field, while the PercentComplete field is an Integer field (and the ProjectNumber field is a text field).



Being an Integer field the value “45.5” is invalid for the PercentComplete field. Depending on whether the source was an Excel file or a CSV file, two different things would happen:

- Excel – The import rounds the number off to the nearest integer. In this case, the value “46” is imported.
- CSV – The import fails with an error message that the input is not in a correct format.

If the external file is a CSV file, you must be careful with the thousands-separator and whether you are using a decimal point or comma. In some countries, you format numbers using a comma as the thousands-separator and a period as the decimal-separator, while in other countries it is the opposite:

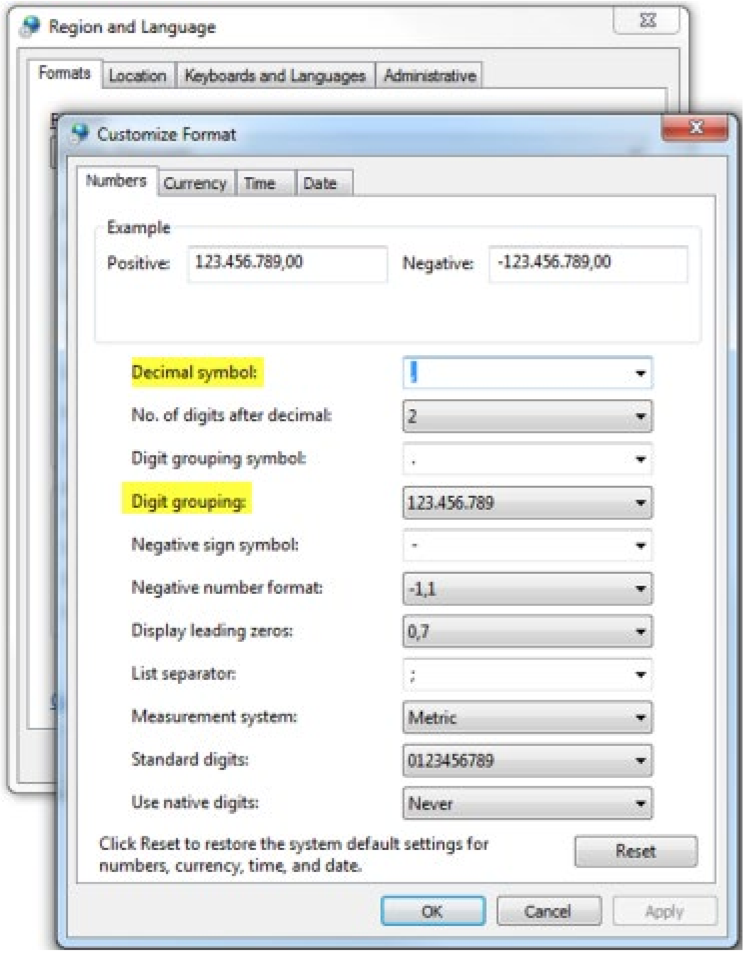
- The Nordic countries: 10.000,50
- US: 10,000.50

To determine which separators you should use, examine the Windows settings:

1. Open the Control Panel.
2. Click **Region and Language**.
3. Click the **Formats** tab if it is not already displayed.
4. Click the **Additional Settings …** button.

   The Customize Format dialog is displayed.

5. Click the **Numbers** tab if it is not already displayed and look for the **Decimal symbol** and **Digit grouping** (the thousands-separator) fields.



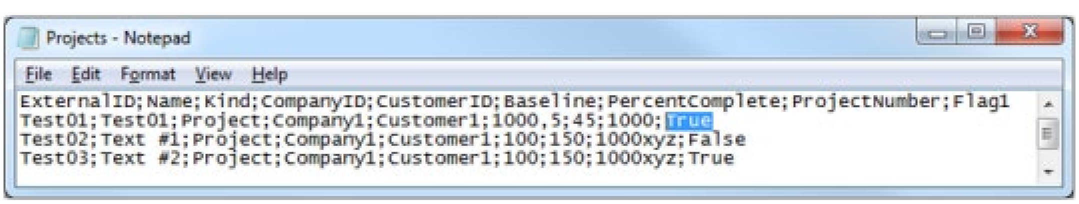
You should generally avoid the thousands-separator altogether and only have to worry about using the correct decimal symbol.

Note: If the external data comes from an Excel file, this problem does not exist.

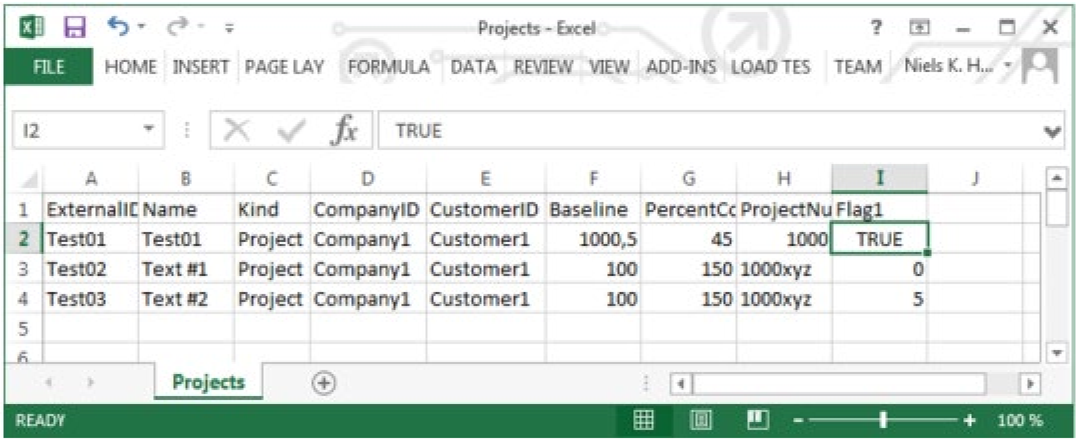
Checkbox or Flag

Some of the columns in People Planner are checkbox columns, sometimes also called flags.

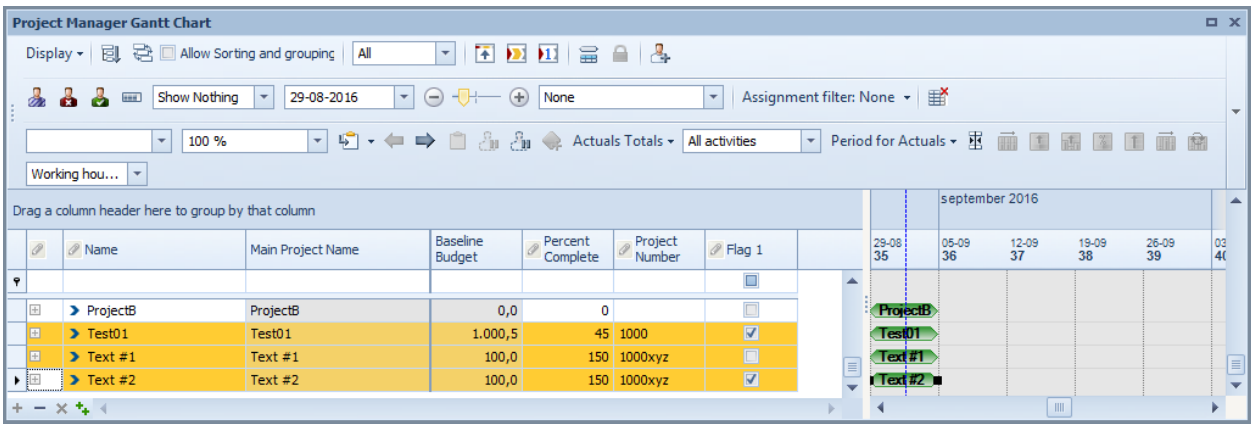
If the source is a CSV file, you use the value "True" to select the checkbox and "False" to deselect it.



When the source is an Excel file, you can still use "TRUE" and "FALSE" for this. However, you can also use the fact that a checkbox is just a special case of an Integer field where 0 means False and any value different from 0 means True.



Both of these examples import to these three projects.



Date

If you import from a CSV file, and it contains dates, you must consider how the dates are written:

- Nordic countries – 02-09-2016
- US – 09-02-2016

If you have the format wrong, and you attempt to import some data, one of two things can happen:

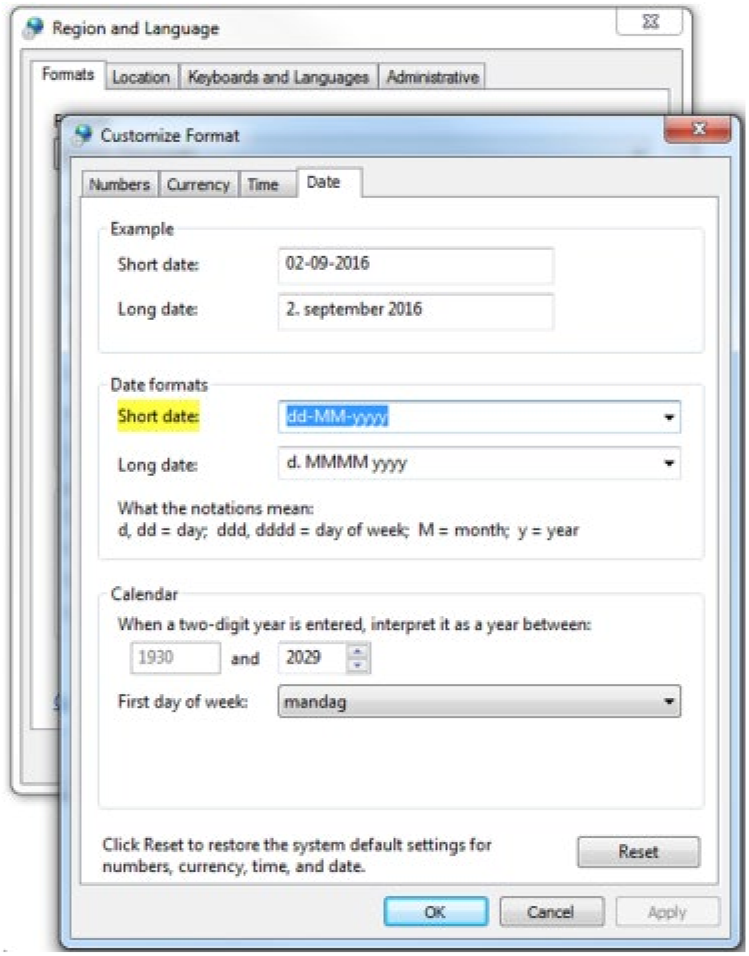
- In the best case, you get an error message.
- In the worst case, the dates are imported into People Planner, but they are wrong; for example, the day and month parts are switched around.

To determine which date format you should use, examine the Windows settings:

1. Open the Control Panel.
2. Click **Region and Language**.
3. Click the **Formats** tab if it is not already displayed.
4. Click the **Additional Settings …** button.

   The Customize Format dialog is displayed.
5. Click the **Date** tab if it is not already displayed, and look for the **Short Date** drop-down list in the Date formats group.

   The Customize Format dialog is displayed.



Note: As an alternative, you can also have the dates in the neutral format yyyy-mm-dd.

Note: When you test the Import Mapping with test data, you should be sure to include a date like December 31, which is invalid in one of the formats.

LookUp

These columns point at data that has been imported into a different table in the People Planner database.

If you import a row of data where one of the fields refers to some other piece of data that you also import, you must ensure that that data has already been imported into the other table before you refer it to its ExternalID from a different Import mapping.

Import Into

You use the **Import Into** field to determine into which People Planner table you want to import the external data.

Before you start importing data into the People Planner tables, you should understand the following.

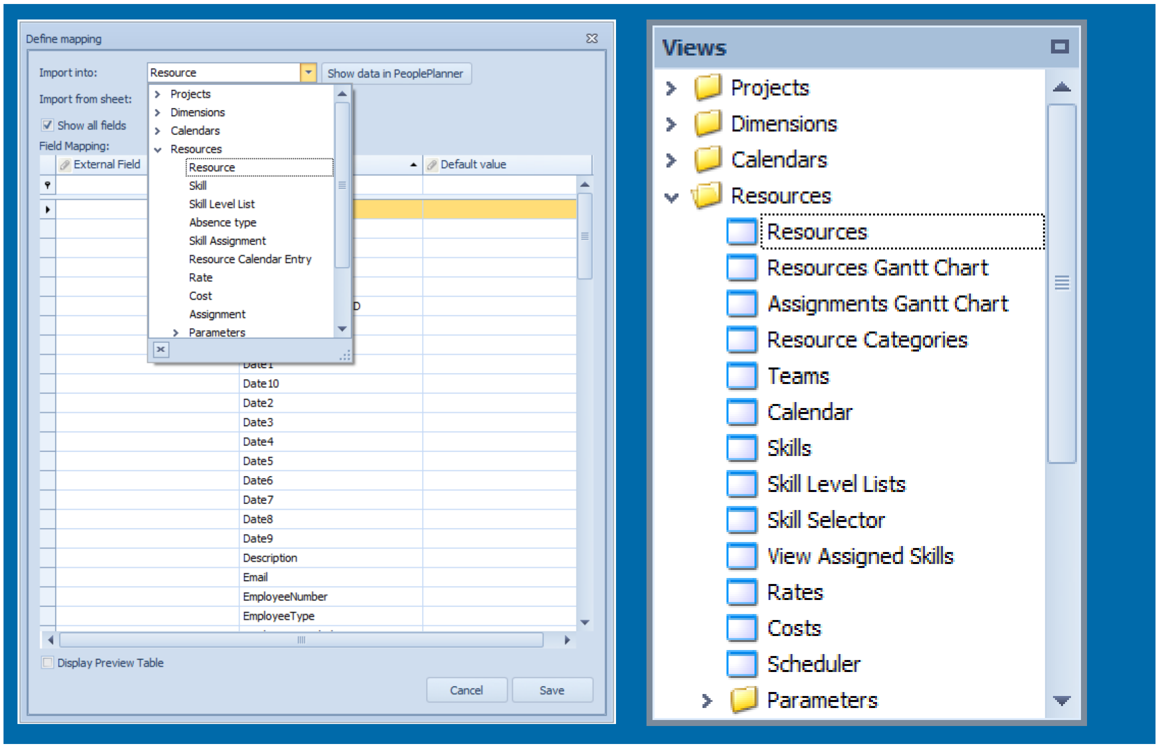
When you import via Import Mappings, you have almost free rein in terms of how you choose to import the external data into the People Planner database. However, as with any powerful and flexible tool, this requires that you know what you are doing.

Although you cannot directly violate the People Planner business logic, you can easily fill its tables with data in a manner for which they are not intended, and which would not occur in connection with a manual operation of People Planner via its GUI. The result could be a People Planner database that differs differ significantly from how it would appear if you entered the same data manually.

Great efforts are put into optimizing the performance of the People Planner software. However, this work has been focused on how customers normally use the system; for example, certain database tables tend to contain a lot of data—and the functionality has been optimized for this—while other tables tend to be quite small—and have so far not required a lot of attention. If you do the import incorrectly, you may therefore end up with a setup that does not perform as well as a more appropriate import would do.

The problem is made worse by the fact that Import Mappings can be used effectively to import large amounts of data—so big that they could never possibly occur in a manual operation.

Although there are differences, the structure of the **Import Into** field mimics the structure of the View menu. This makes it easy to determine which tables go together with which views.



The following table describes the most important imports.

Import	Import Into
Projects and tasks	Projects » Project Task Milestone
Budgets	Projects » Project Task Milestone
Customers	Dimensions » Customer
Resources	Resources » Resource
Users	Security » User
Assignments	Assignments are automatically created when you book a resource on a task.
Bookings/Allocations	Entries » Man hour entry
Absences	Entries » Man hour entry
Time Registrations	Entries » Time registration entry

Run an Import Mapping

You can run an Import Mapping manually, or you can add a Task Specification and a Scheduled Task on top of the Import Mapping and set up an automated run.

Run an Import Mapping Directly

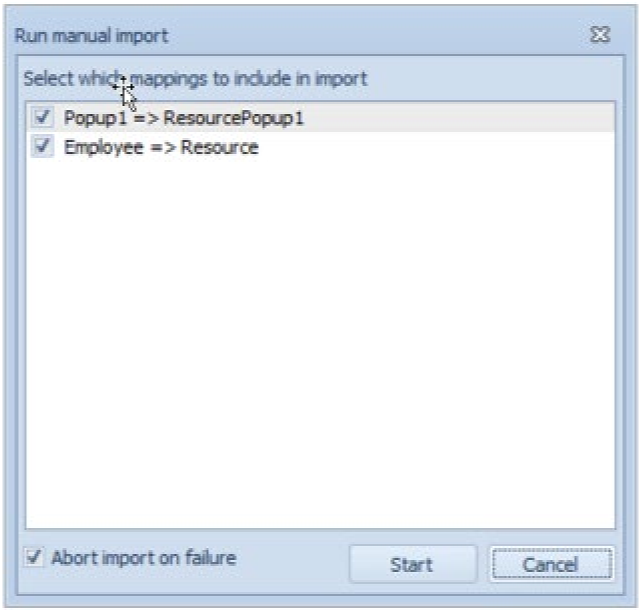
To run an Import Mapping directly, you must first open it.

If you have just created it, the view is still open. If it is an Import Mapping that you created previously, you can open it by doing the following:

1. Open the Mappings view.
2. Select the Import Mapping.
3. Click the **Edit** button.

When the Edit Import Mapping view is open, you click the Run Import button. This opens the Run Manual Import view.

1. Select which mappings you want to run.
2. Click the **Start** button.



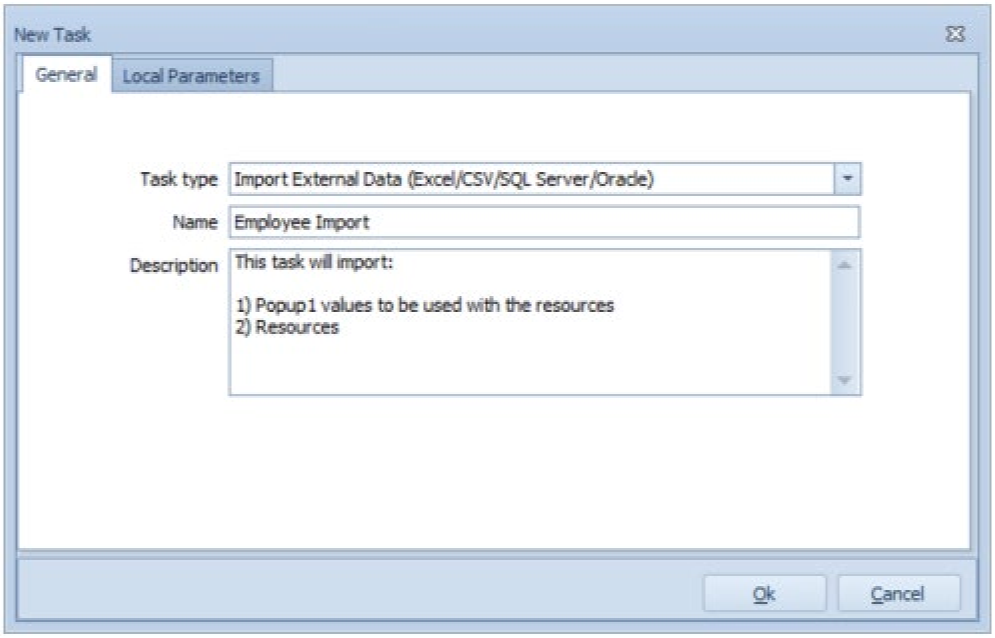
Task Specification

To automate the import, you must start by creating a Task Specification. You can then later add a Scheduled task on top of this.

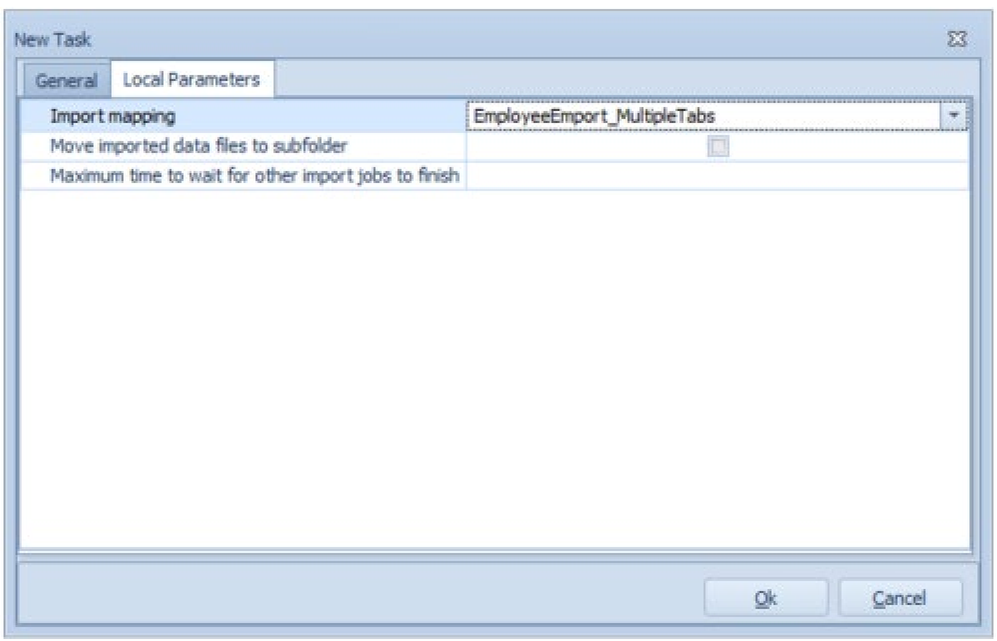
To use a Task Specification to automate the import:

1. Navigate to **Views » Tasks » Task Specification**.
2. Choose **Import External Data (Excel/CSV/SQL Server/Oracle)** from the drop-down list for the **Task type** field.

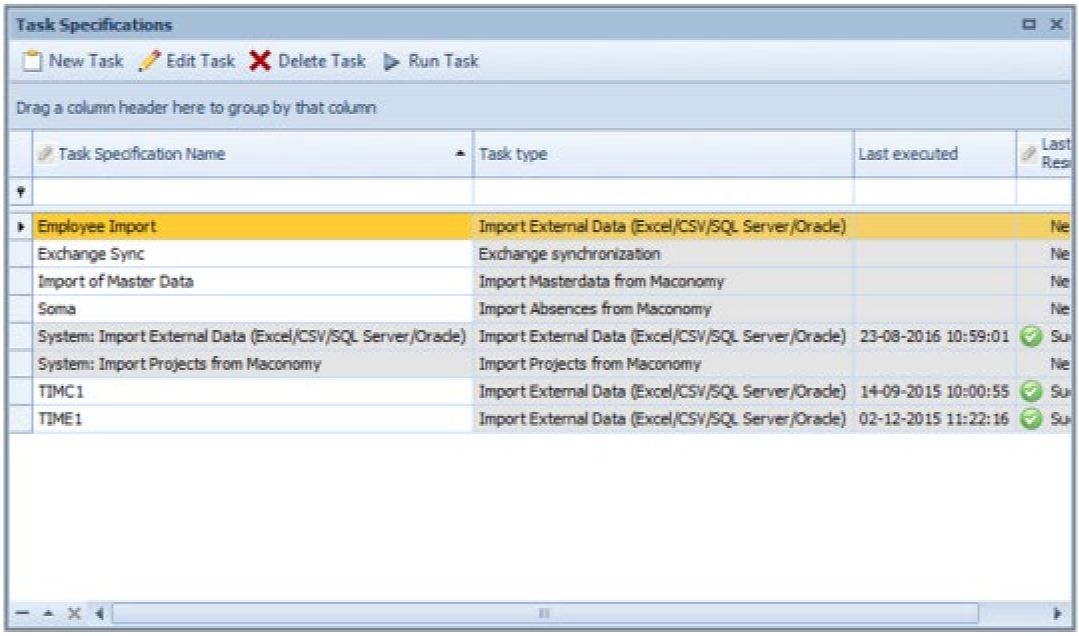
3. Enter a name and a description in the **Name** and **Description** fields, respectively (optional).



4. Click the **Local Parameters** tab.
5. Choose your Import Mapping from the drop-down list for the **Import Mapping** field.



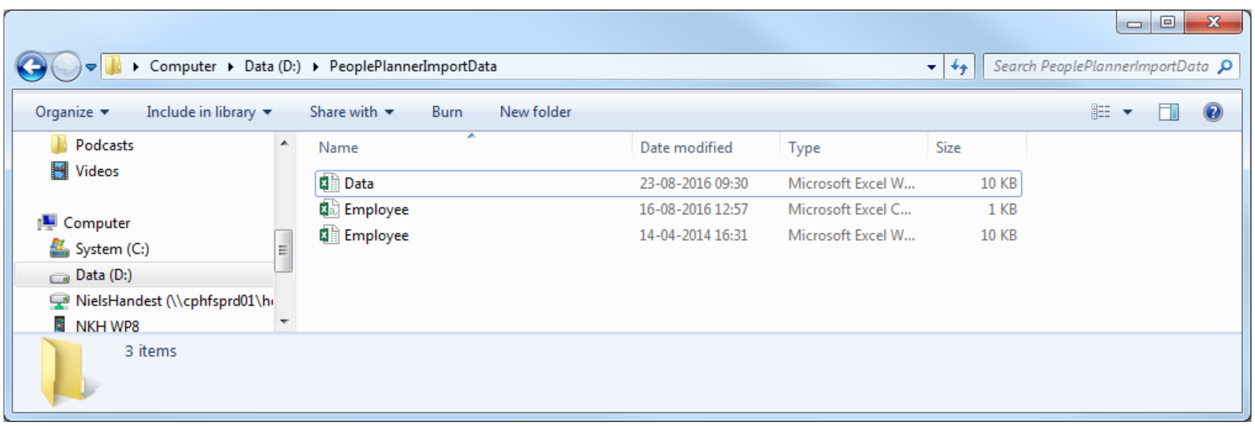
6. Click the **Ok** button to save the Task Specification.



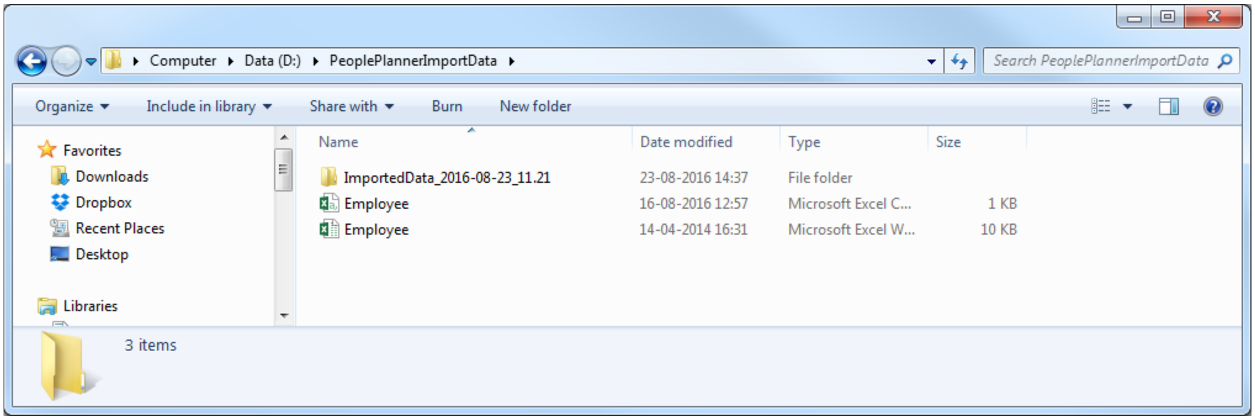
You can run the Task Specification by selecting it in the list and then clicking the Run Task button.

Another of the local parameters, **Move Imported Data Files to Subfolder**, controls what should happen to the file with the external data after the import. When this checkbox is selected, People Planner creates a subdirectory and moves the file to that subdirectory as a backup.

The following figure shows an example before importing the external data in the Data.xlsx file.



After the import, a new subfolder has been created for backup and the file has been moved to that subfolder.



Tip: Another way to create a backup is to define a Post-Execute Command that achieves this and use it with the Scheduled Task.

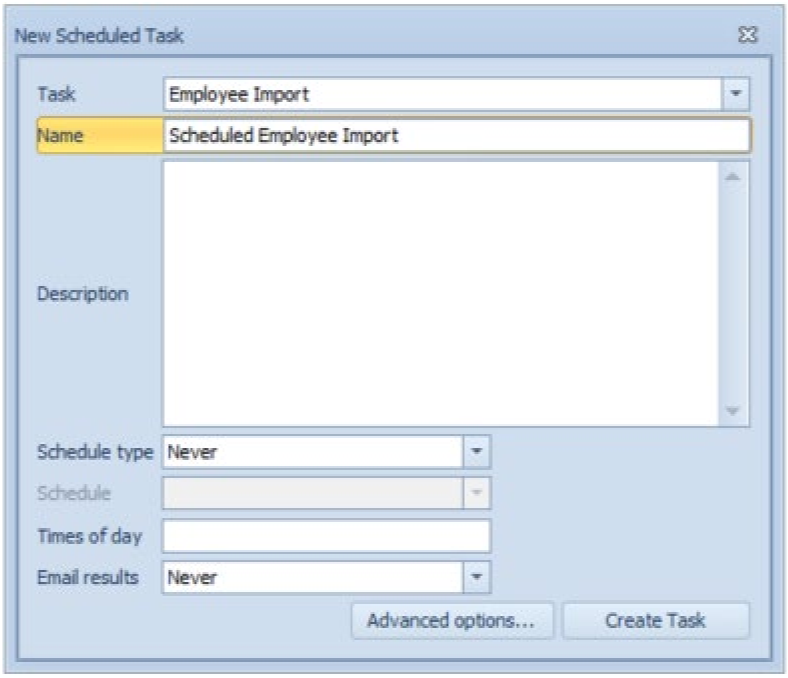
Scheduled Task

You add a Scheduled Task on top of the Task Specification in the usual manner. Another way to create a backup is to define a Post-Execute Command that achieves this and use it with the Scheduled Task.

To do this, complete the following steps:

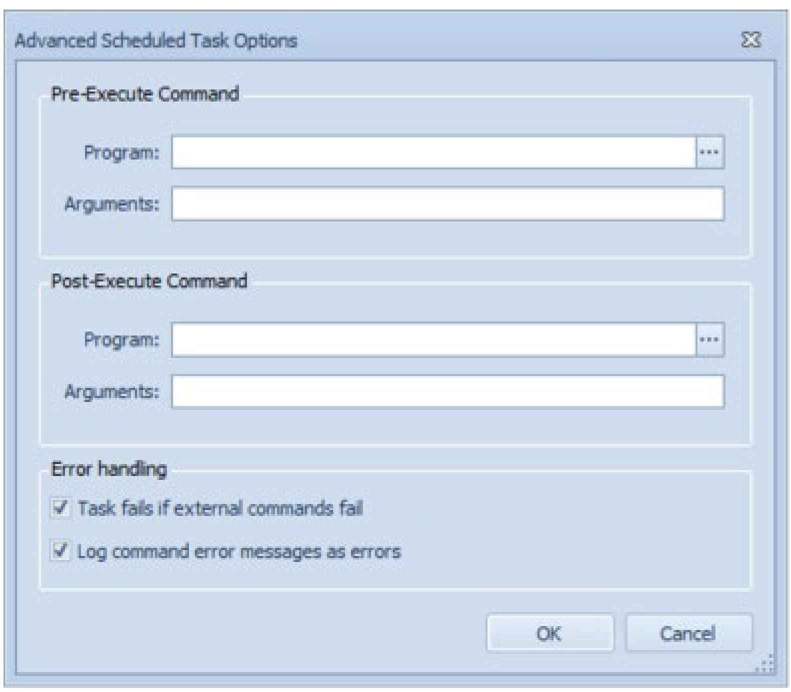
1. Click the **New Schedule** button.
2. Select the Task Specification.
3. Give the Scheduled Task a name.

4. Define a schedule.



A special consideration when importing from Excel and CSV files is the files themselves. How they are created, and what should be done with them after the import? This is what the Pre-Execute and the Post-Execute commands are for.

5. Click the **Advanced Options…** button. The Advanced Scheduled Task Options dialog is displayed.



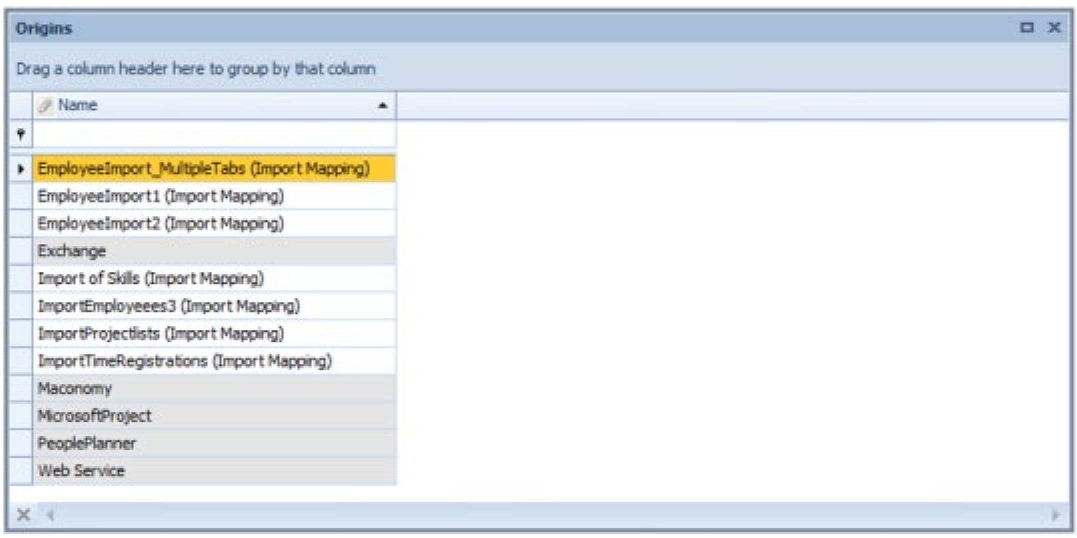
A Pre-Execute and a Post-Execute command are simply programs that you want to execute. They are usually BAT or CMD files but they can also be EXE files. You can also add arguments when these programs are called.

Command	Description
Pre-Execute Command	This command is run before the Import Mapping is run. The usual purpose is to create the Excel or CSV file, and/or to move it to the folder where the Import Mapping expects to find it.
Post-Execute Command	This command is run after the Import Mapping has been run. The usual purpose is to remove the Excel or CSV file or perhaps move it to a backup folder. Another use could be to run some SQL command against the database. **Note:** Using the local parameter **Move Imported Data Files to Subfolder** is another way to move the file to a backup folder.

Normally, the Execution Result of the task is determined by whether the Import Mapping succeeded or not. By selecting the **Task fails if external commands fail** checkbox you can include the result of the Pre- and Post-Execute Commands. This requires that the CMD file return an ERRORLEVEL that is different from zero.

Origin and ExternalID

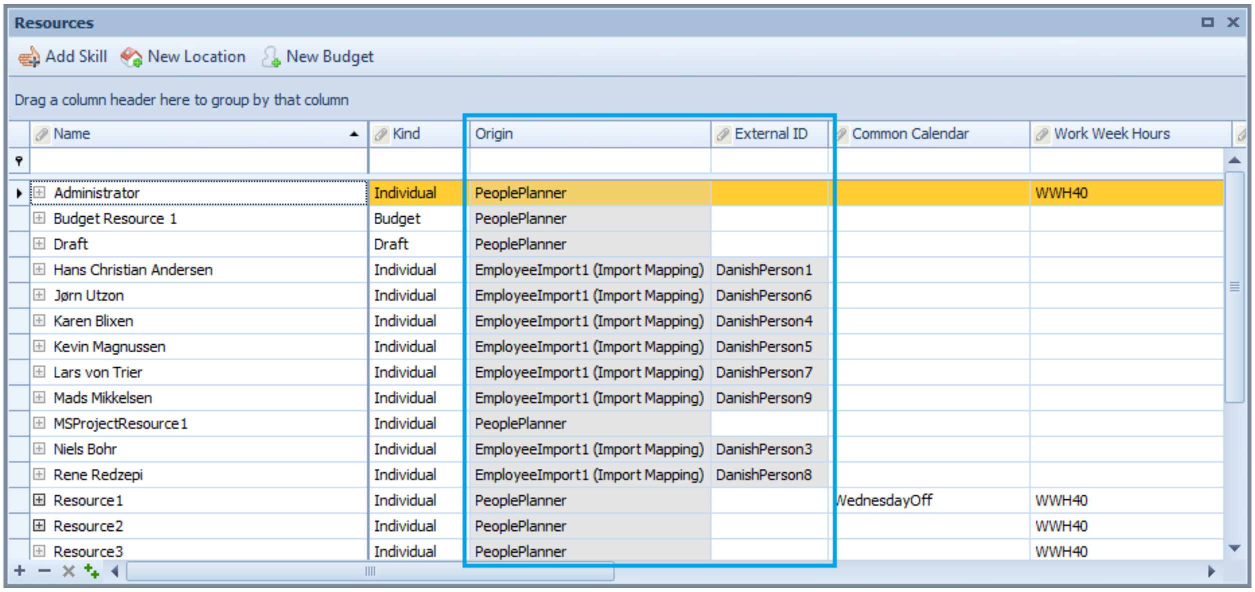
When you create an Import Mapping, the system automatically creates an Origin for it. You find the origins by navigating to Views » Tasks » Origins.



The name of the Origin is the concatenation of the name of the Import Mapping plus the suffix "(Import Mapping)" as shown in the preceding figure.

Note: You are free to create two or more Import Mappings with the same name. The names of the Origins are then also the same. However, they still have different IDs (the Id column is not added in the Origins window shown in the preceding figure), and they are treated as different Import Mappings.

When you run the Import Mapping, the imported data receives the Origin of the Import Mapping.



All data in the People Planner database has an Origin; for example, data created directly in People Planner has the Origin “PeoplePlanner,” and data imported from Maconomy has “Maconomy” as its Origin. One way to interpret the Origin is that it indicates from where the data originated.

However, that is not quite correct:

- If you create an Import Mapping to import some extra data from Maconomy, you do not have a way to ensure that this data also gets the Origin = Maconomy. Instead, this data always gets the Origin of the Import Mapping.
- If you create a suite of Import Mappings to define an integration to a third-party system, you do not have a method to ensure that they share the same Origin. Each Import Mapping results in a different Origin.

If the Origin indicates where the data came from, the External ID is the identity of the data on that external system. For example, if you import Resources (Employees in Maconomy) you should use an External ID that identifies each employee uniquely on the external system; the employee number would be a good choice.

Privileges

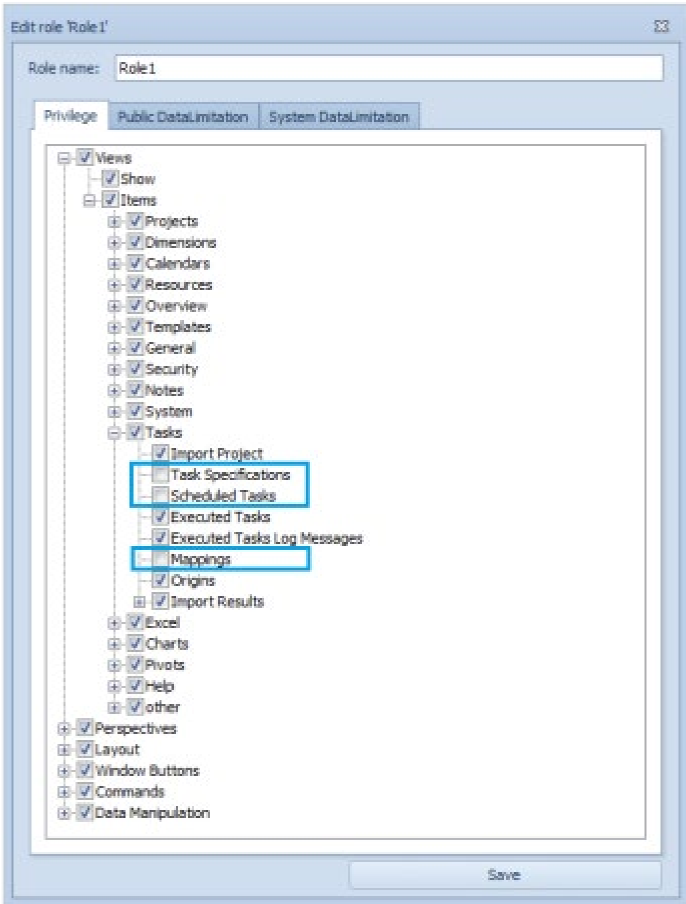
This section discusses the privileges that control Import Mappings.

Who May Run an Import Mapping?

If you need to control who can run an Import Mapping, you do this by restricting their access to the three views:

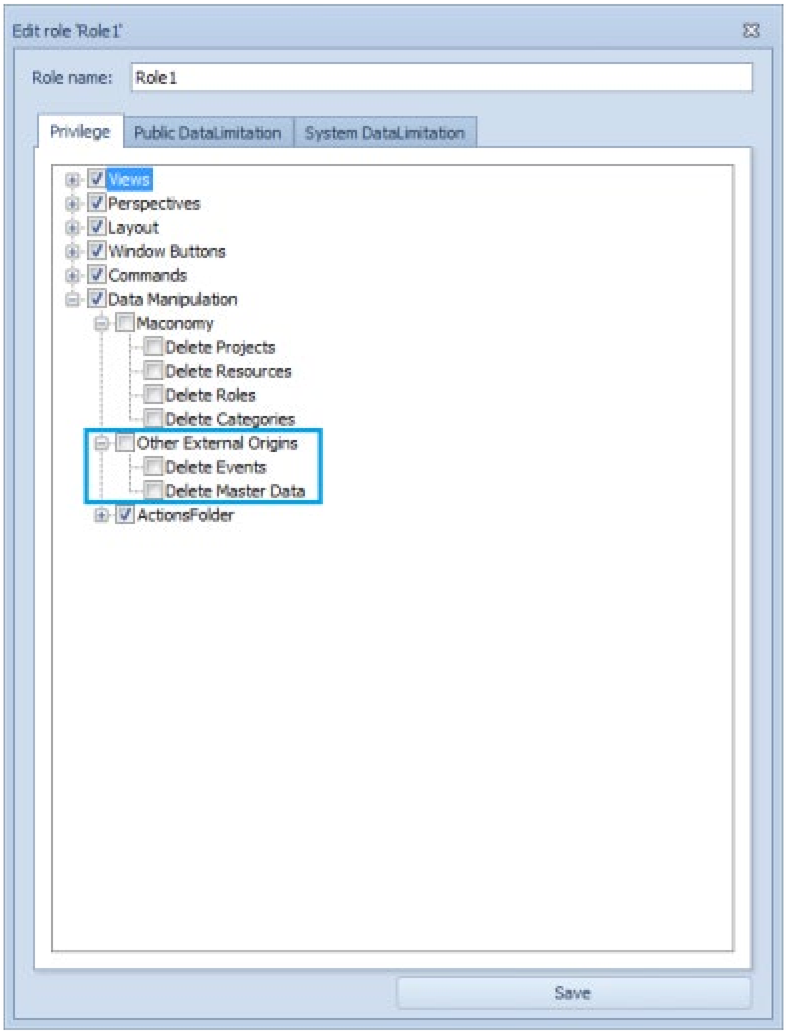
- Views » Tasks » Mappings
- Views » Tasks » Task Specification
- Views » Tasks » Scheduled Tasks

You do this in the role setup.



Deletion of Data

You control whether a user is allowed to delete data that has been imported via an Import Mapping by editing two privileges in the role setup.



These two privileges are analogues to the privileges for Maconomy. However, the settings are slightly different from the Maconomy cases.

Maconomy Import	Import Mapping	Notes
Delete Projects	Delete Events	▪ The Maconomy privilege controls whether the user can delete the whole project. ▪ The Import Mapping privilege is more fine-grained and controls whether the user can delete individual events. If the user deletes the project event, this is the same as deleting the whole project.
Delete Resources Delete Resource Categories	Delete Master Data	▪ Resources, Resource Categories, and Roles are all cases of Master Data. The Maconomy import can control individually whether the user is allowed to delete these types of

Maconomy Import	Import Mapping	Notes
Delete Roles		Master Data. However, it cannot control whether the user is allowed to delete other types of Master Data, such as customers. ▪ The Import Mapping privilege is broader than this and controls all types of Master Data, for example, including whether the user is allowed to delete customers.

Practical Examples

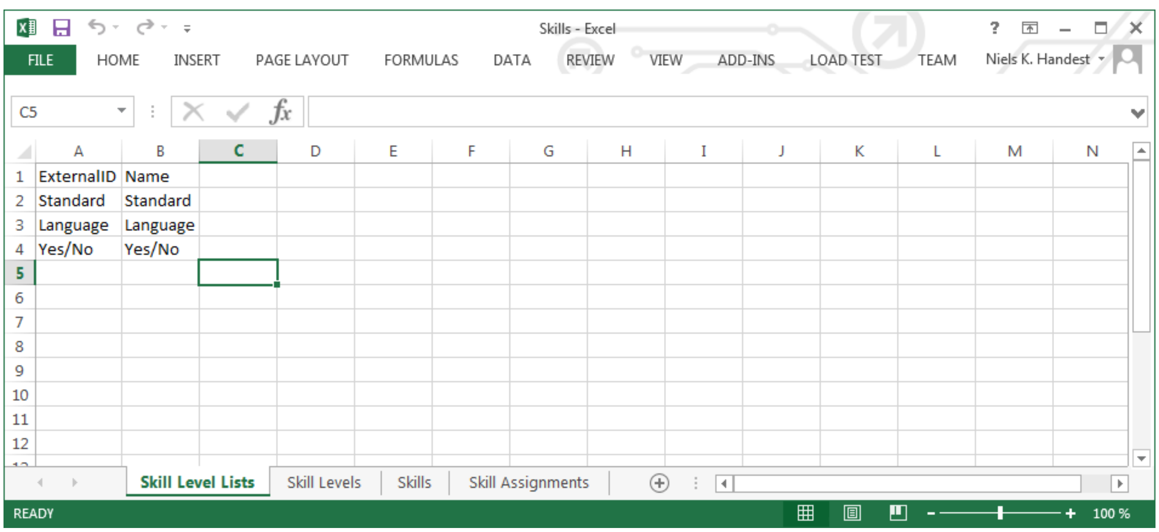
The following are some examples of practical usages. These are intentionally simple examples.

Import of Skills and Skill Assignments

In this example, you import skills from an Excel file into People Planner, including assigning the skills to existing resources.

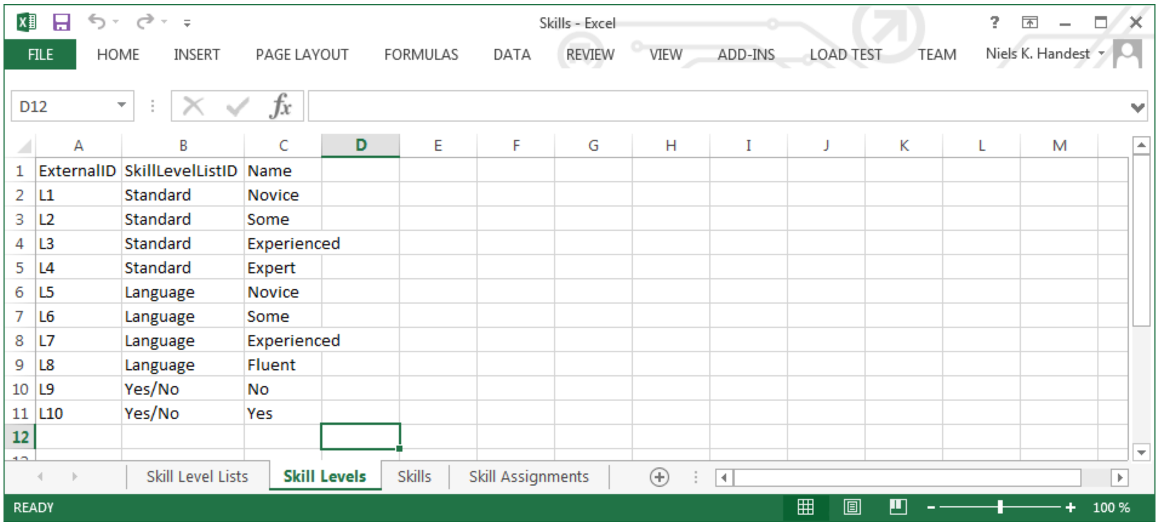
Assuming that the skills are stored in an external system—for example, an HR-system—and that you can export them from there to an Excel file, this is the simplest format that you can use.

1. Create an Excel file and name it **Skills.xlsx** or something similar.
2. Add the first sheet and name it **Skill Level Lists**, with the format shown in the following figure.



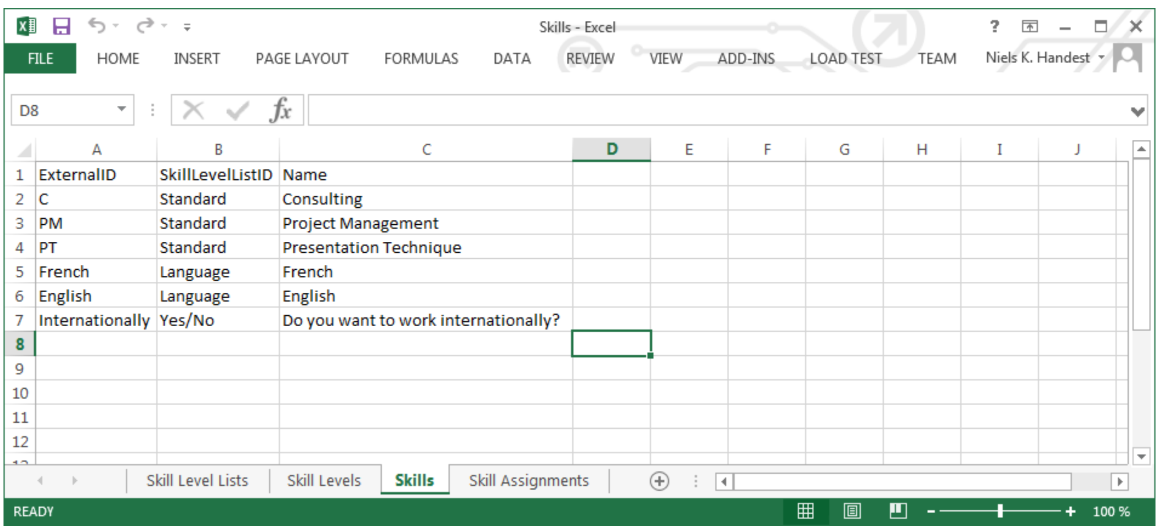
3. Add a second sheet and name it **Skill Levels**, with the following format.

   The example-data shows that the Skill Level List with the name **Language** has four levels: Novice (L5), Some (L6), Experienced (L7), and Fluent (L8).



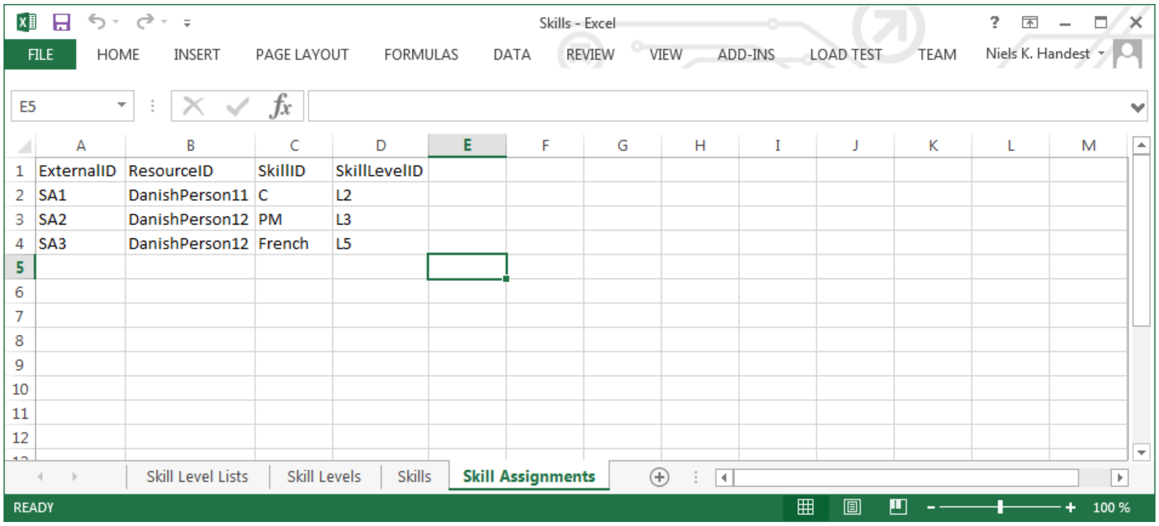
4. Add a third sheet and name it **Skills**, with the following format.

   The example-data shows that the three different skills—Consulting, Project Management, and Presentation Technique—share the same Skill Level List named Standard, with the following levels: Novice, Some, Experienced, and Expert.



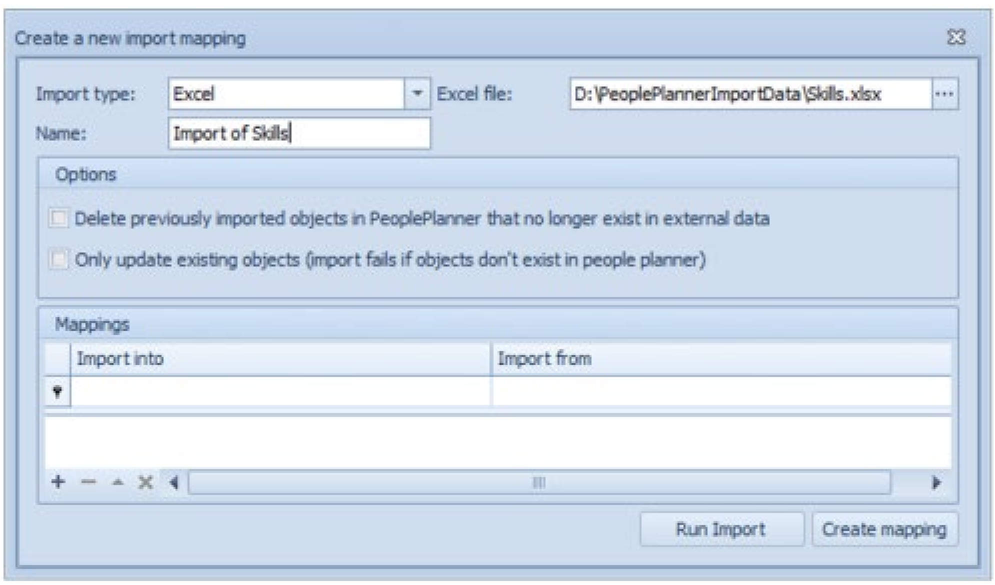
5. Add a fourth sheet and name it **Skill Assignments**, with the following format.

   The example data shows that the Resource with the External ID DanishPerson12 has two skills, Project Management and French, at the levels Experienced and Novice, respectively.

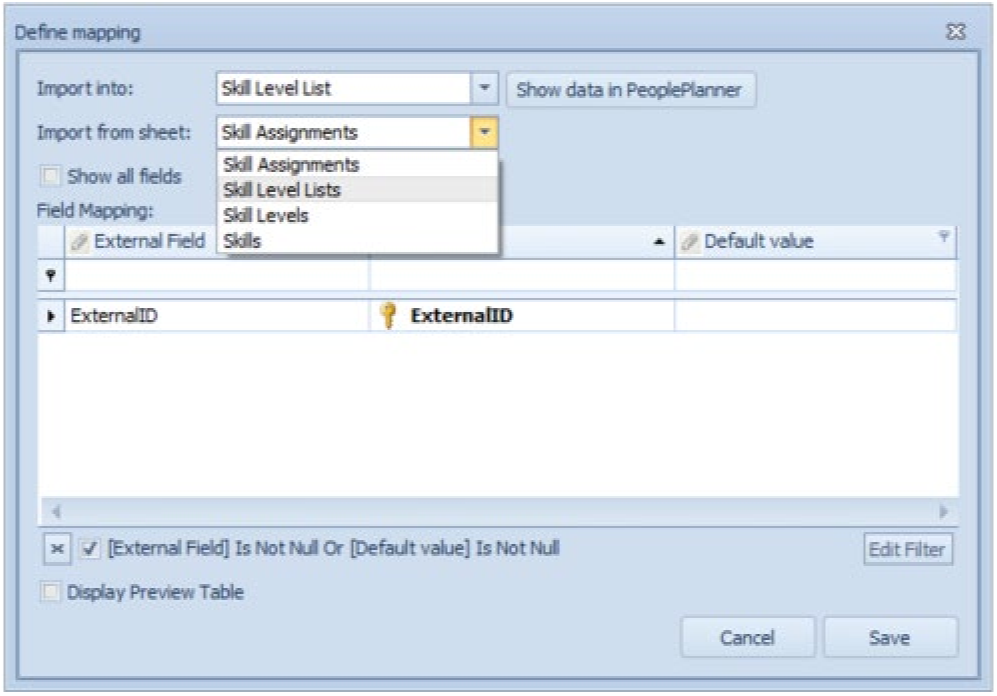


Now that the file format is ready, the next step is to create an Import Mapping in People Planner.

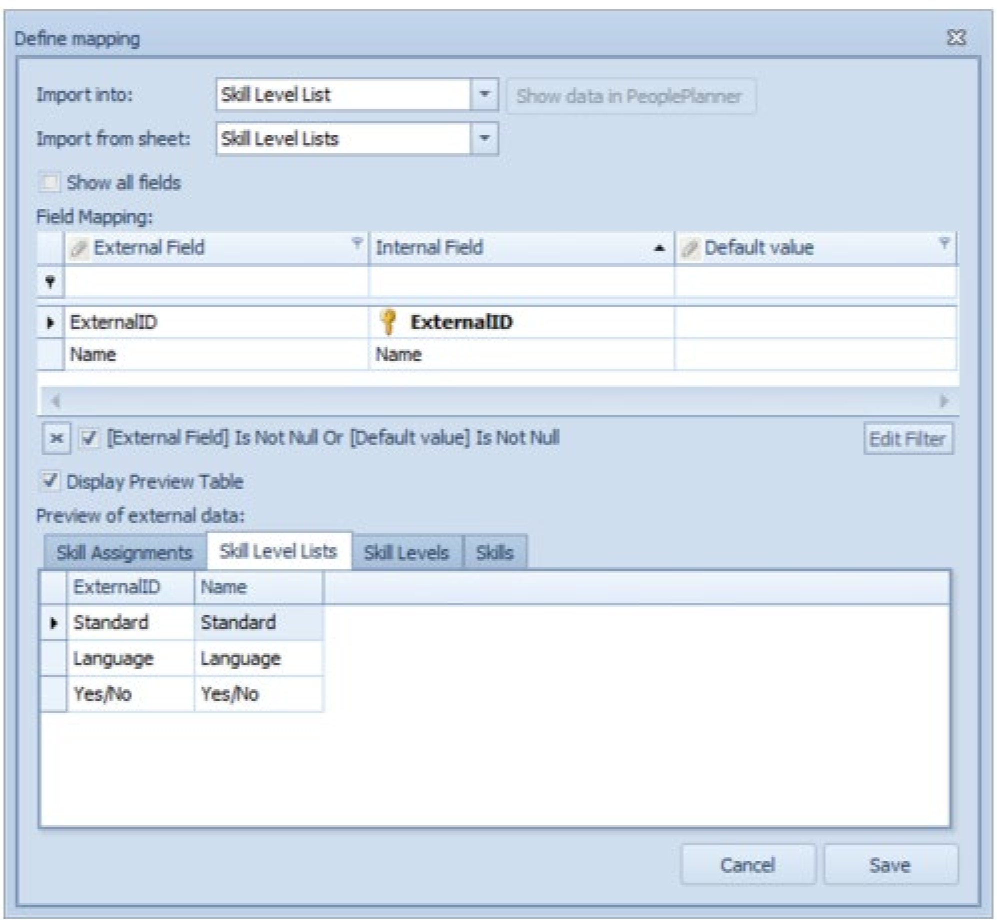
1. Start People Planner and create an Import Mapping.
2. Choose **Excel** from the drop-down list for the **Import Type** field.
3. Choose the Excel file from the drop-down list for the **Excel file** field.



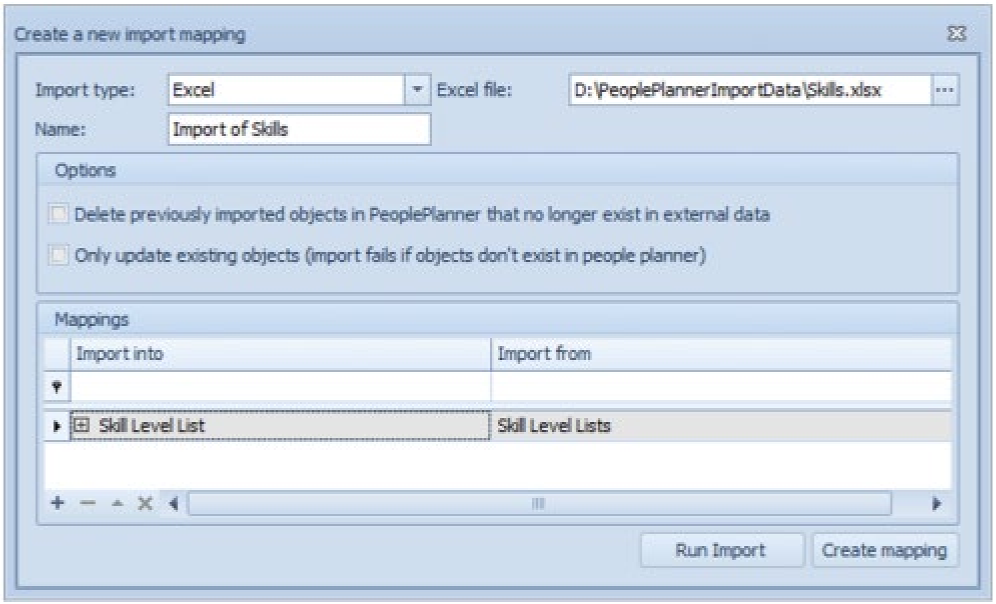
4. Click the **+** button in the lower-left corner to add the first mapping.
5. Choose **Resources » Skill Level List** from the drop-down list for the **Import into** field.
6. Choose **Skill Level Lists** from the drop-down list for the **Import from sheet** field.



7. Verify that the fields have been mapped correctly.

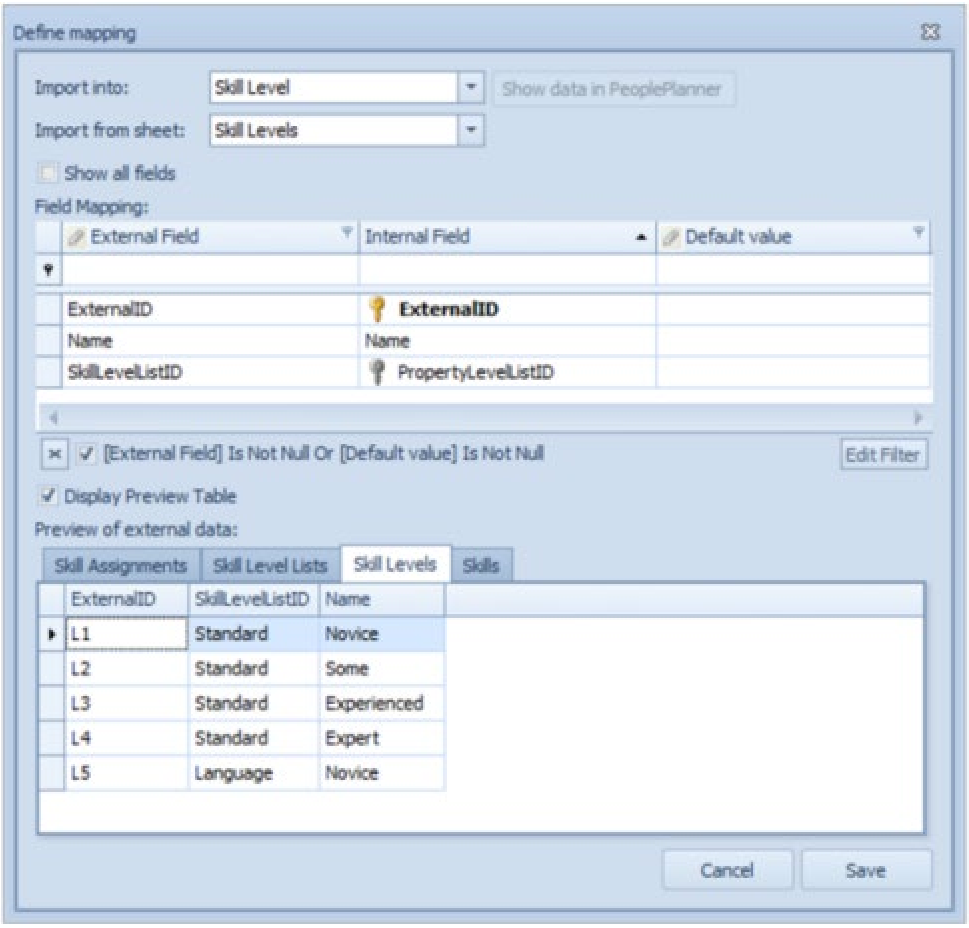


8. Click the **Save** button to save the mapping.

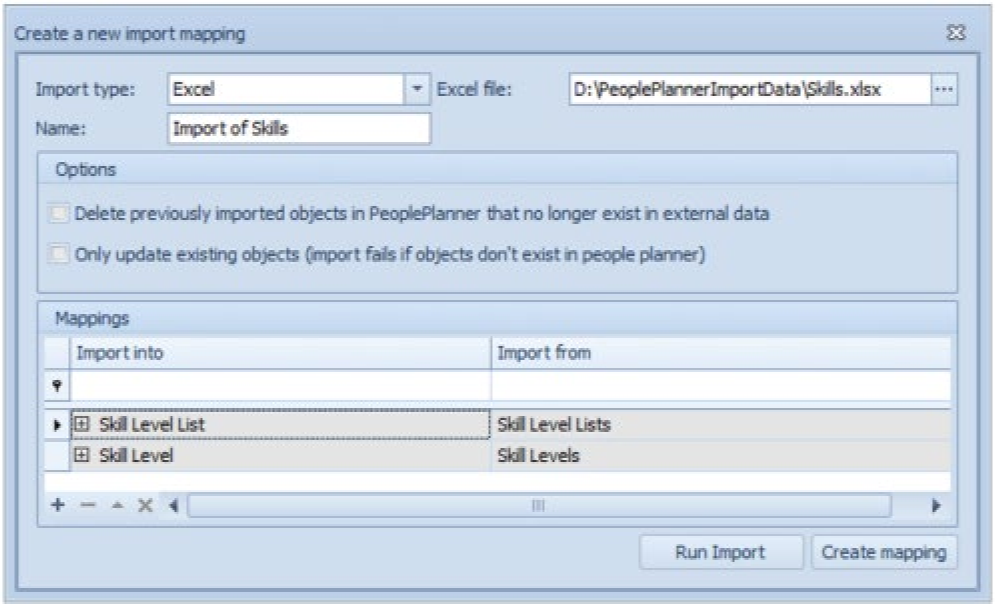


9. Click the **+** button to add a second mapping.
10. Choose **Resources » Parameters » Skill Level** from the drop-down list for the **Import into** field.
11. Choose **Skill Levels** from the drop-down list for the **Import from sheet** field.
12. Verify that the fields have been mapped correctly.

> **Note:** You must map the external SkillLevelListID field to the internal PropertyLevelListID field manually. The difference in name is because Skills are actually called “Properties” internally in the People Planner database.

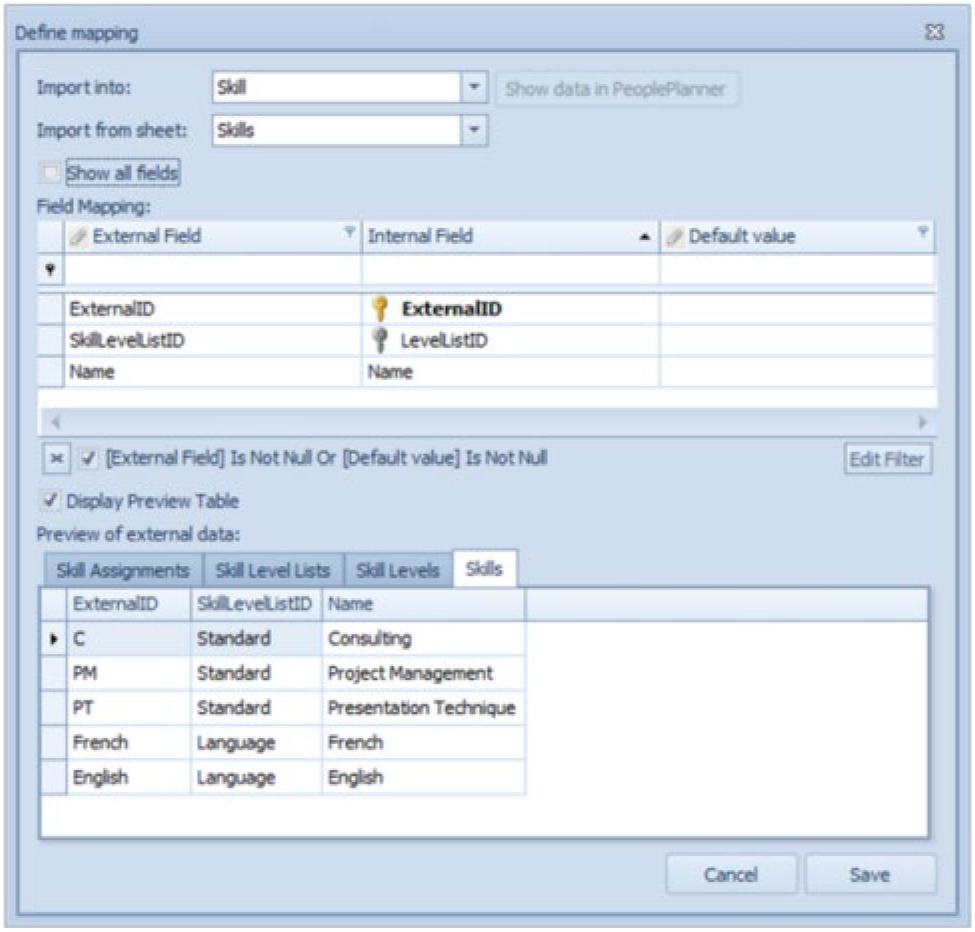

Define mapping
Import into:
Skill Level
Show data in PeoplePlanner
Import from sheet:
Skill Levels
Show all fields
Field Mapping:
External Field
Internal Field
Default value
ExternalID
ExternalID
Name
Name
SkillLevelListID
PropertyLevelListID
[External Field] Is Not Null Or [Default value] Is Not Null
Edit Filter
Display Preview Table
Preview of external data:
Skill Assignments
Skill Level Lists
Skill Levels
Skills
ExternalID
SkillLevelListID
Name
L1
Standard
Novice
L2
Standard
Some
L3
Standard
Experienced
L4
Standard
Expert
L5
Language
Novice
Cancel
Save

13. Click the **Save** button to save this mapping.

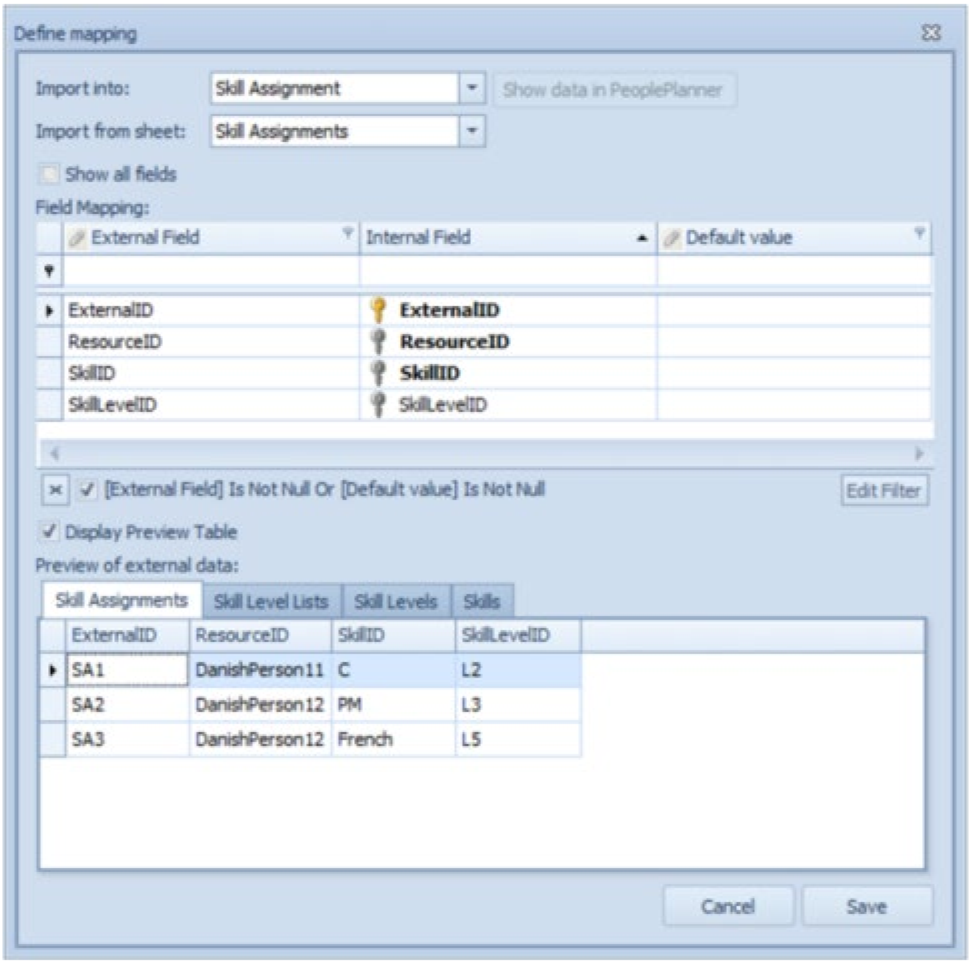


14. Click the **+** button to start adding a third mapping.
15. Choose **Resources** » **Skill** from the drop-down list for the **Import into** field.
16. Choose **Skills** from the drop-down list for the **Import from sheet** field.
17. Verify that the fields have been mapped correctly.

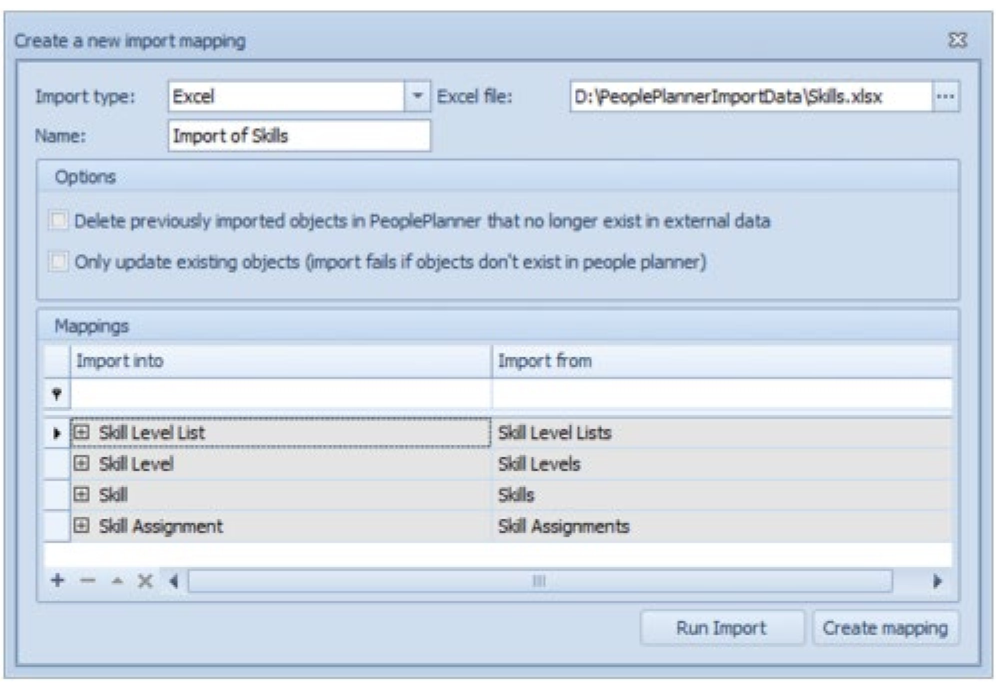
> **Note:** You must map the external SkillLevelListID field to the internal LevelListID field manually.



18. Click the **Save** button.
19. Click the **+** button to add the fourth mapping.
20. Choose **Resources » Skill Assignment** from the drop-down list for the **Import into** field.
21. Choose **Skill Assignments** from the drop-down list for the **Import from sheet** field.
22. Verify that the fields have been mapped correctly.

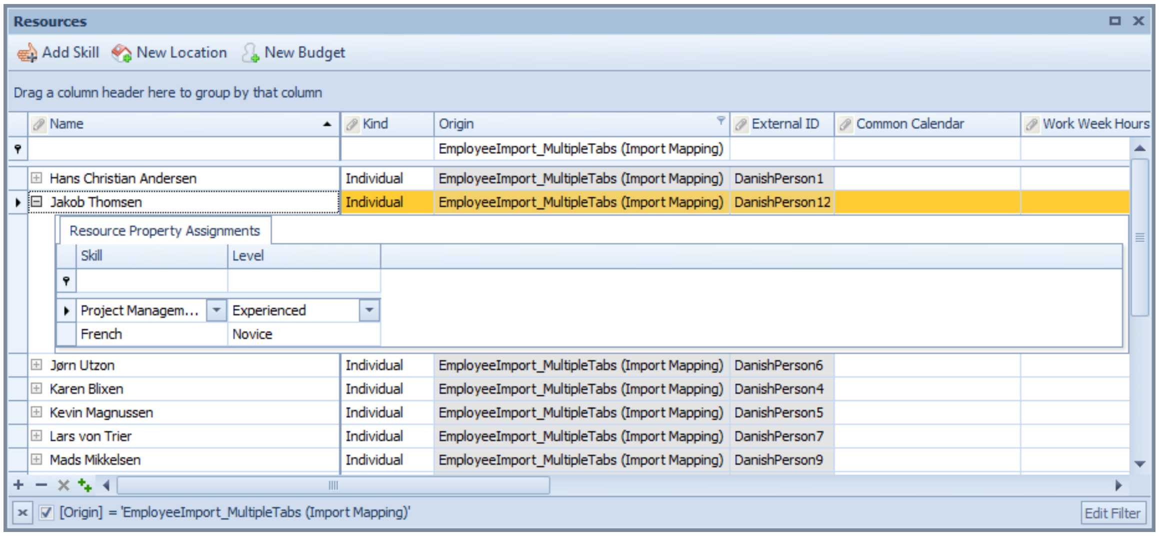


23. Click the **Save** button.



24. Click the **Create Mapping** button to save the full Import Mapping.

When you run this Import Mapping, the result looks something like the following figure.



Note: Only the Resources view is shown, but the four mappings import data into the following views:

- Views » Resources » Skill Level Lists
- Views » Resources » Parameters » Skill Levels
- Views » Resources » Skills
- Views » Resources » Resources

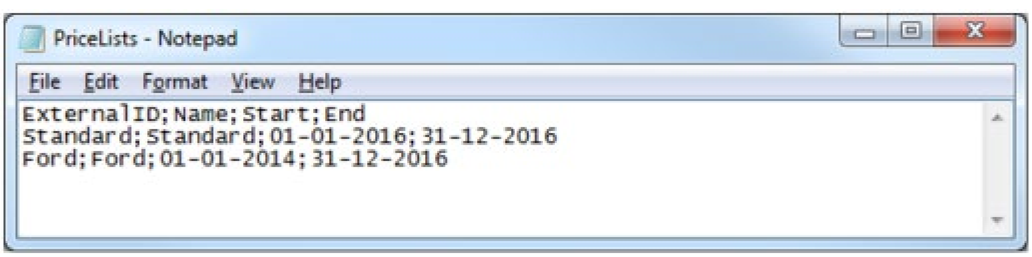
Import Price Lists

In this example, you import price lists from a set of CSV files into People Planner, including assigning the price lists to projects.

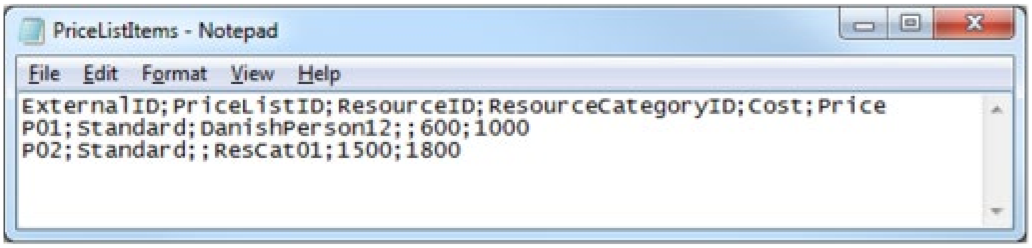
In the simplest example, you must create three CSV files:

1. PriceLists.csv – A list of the available price lists.
2. PriceListItems.csv – A list of the prices for individual resources and resource categories.
3. Projects.csv – A list of projects and their price lists.

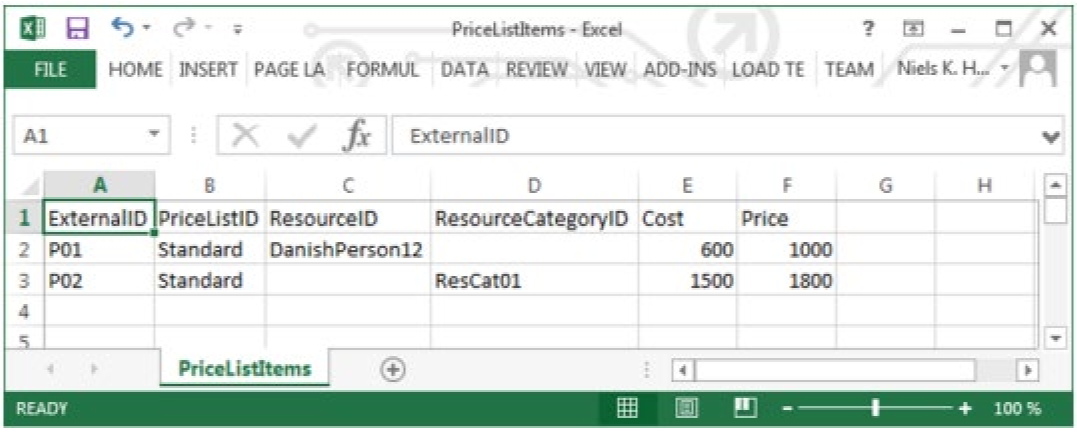
In this example, the list of price lists contains two lists, Standard and Ford.



In People Planner, a price list can have lines that are either for a resource or for a resource category, but not both. In this example, the Standard price list has two lines, one for the resource DanishPerson12, and one for the resource category ResCat01.

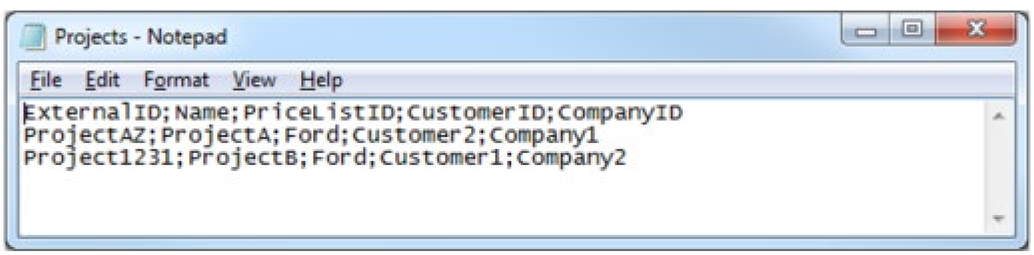


It is easier to see this if you load the CSV file into Excel.



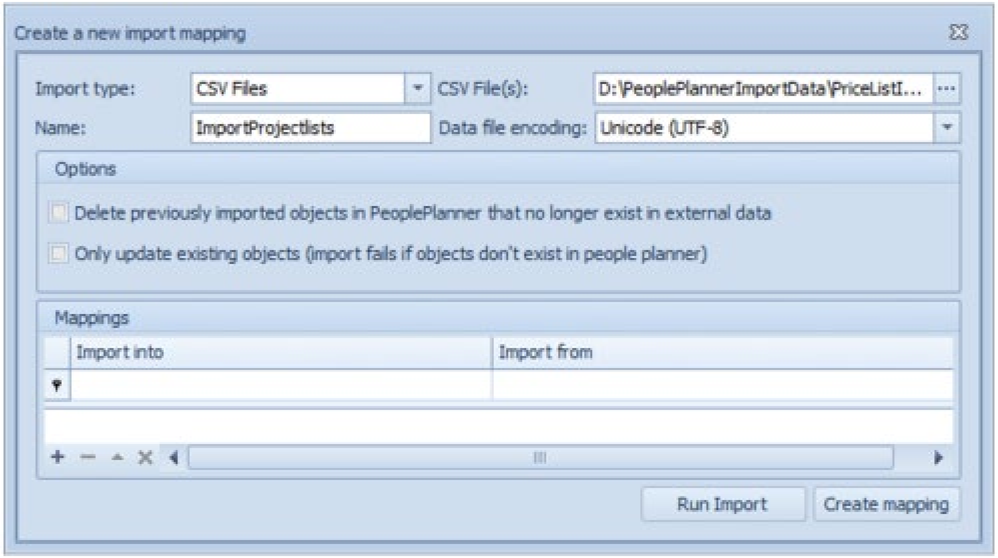
The third file is for importing projects. In addition to creating the projects, it also assigns a customer and a company to the project. Additionally, it assigns a price list is to the project.

> **Note:** You can configure People Planner so that Customer and Company are not mandatory properties on a project.

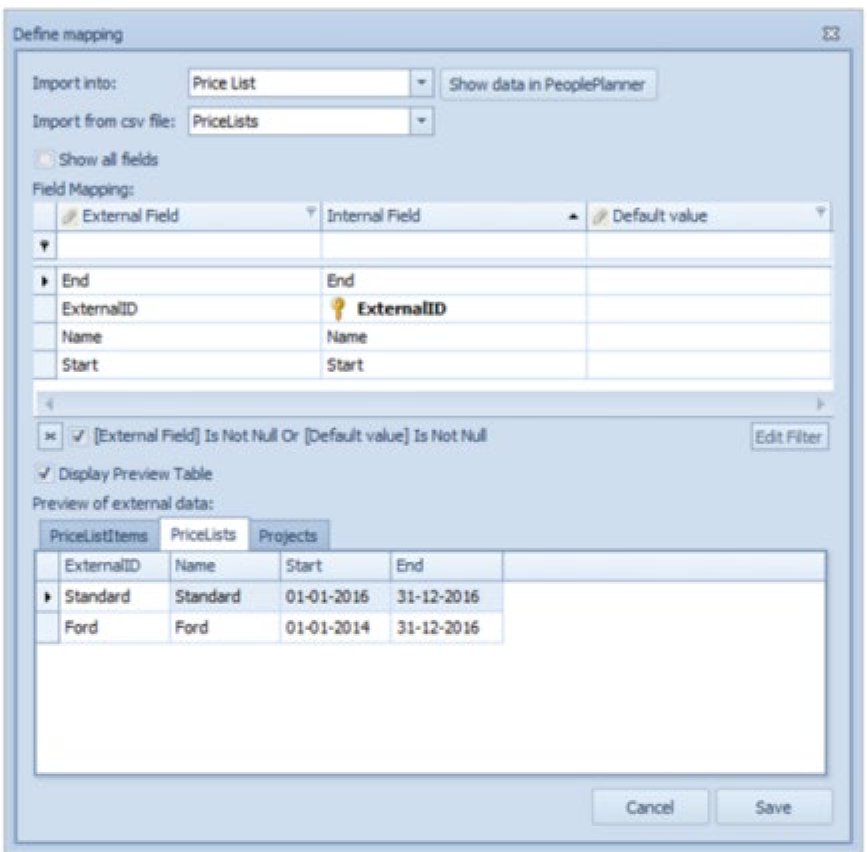


When you have created the three CSV files with example data, the next step is to create an Import Mapping in People Planner.

1. Create an Import Mapping.
2. Choose **CSV Files** from the drop-down list for the **Import type** field.
3. Choose the three CSV files from the drop-down list for the **CSV File(s)** field.
4. Enter a name for the Import Mapping in the **Name** field.

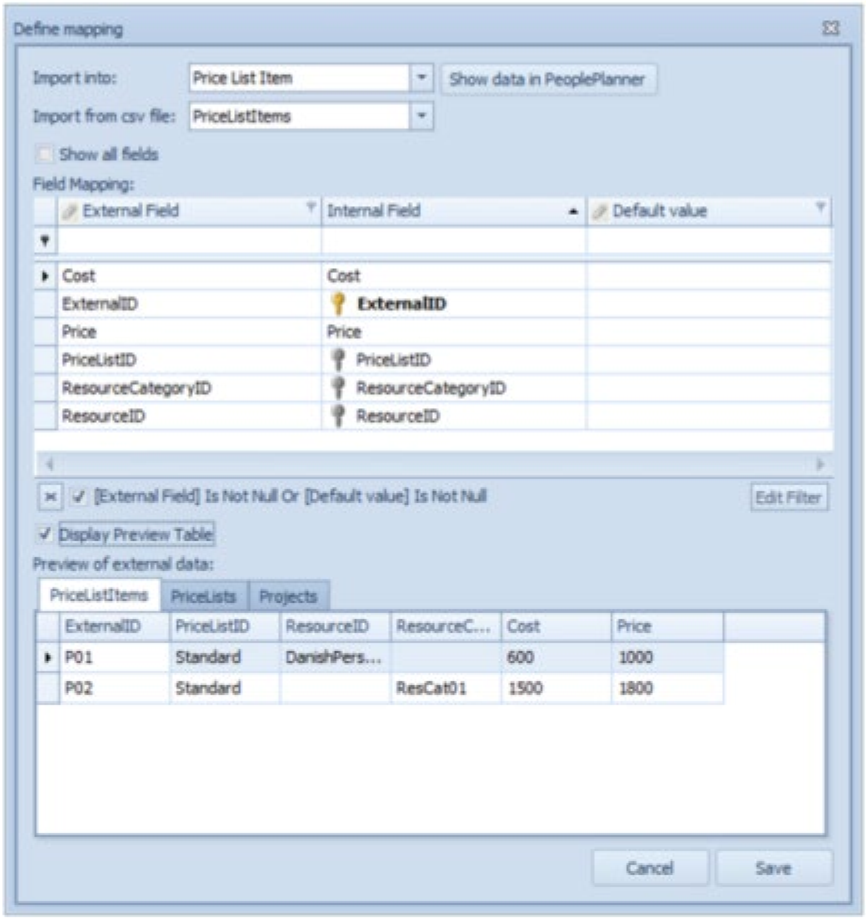


5. Click the **+** button to add the first mapping.
6. Choose **Projects » Prices » Price List** from the drop-down list for the **Import into** field.
7. Choose **PriceLists** from the drop-down list for the **Import from csv file** field.
8. Verify that the fields have been mapped correctly.



9. Click the **Save** button.
10. Click the **+** button to add the second mapping.

11. Choose **Projects** » **Prices** » **Price List Item** from the drop-down list for the **Import into** field.
12. Choose **PriceListItems** from the drop-down list for the **Import from csv file** field.
13. Verify that the fields have been mapped correctly.

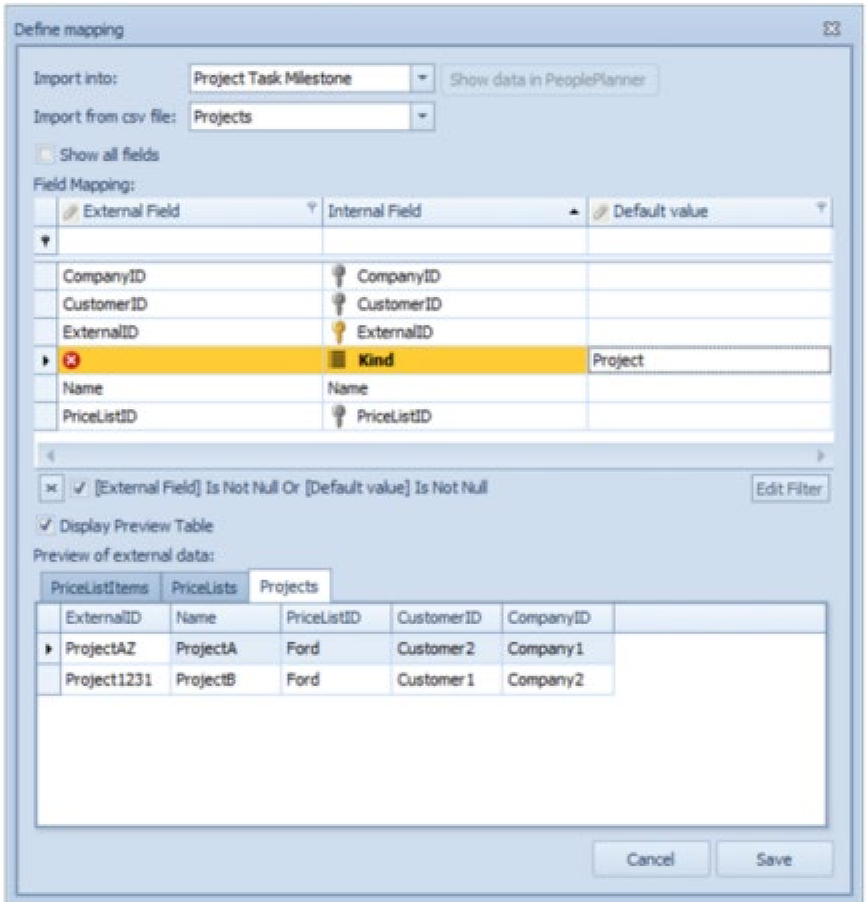


14. Click the **Save** button.
15. Click the **+** button To add the third and final mapping
16. Choose **Projects** » **Project Task Milestone** from the drop-down list for the **Import into** field.
17. Choose **Projects** from the drop-down list for the **Import from csv file** field.

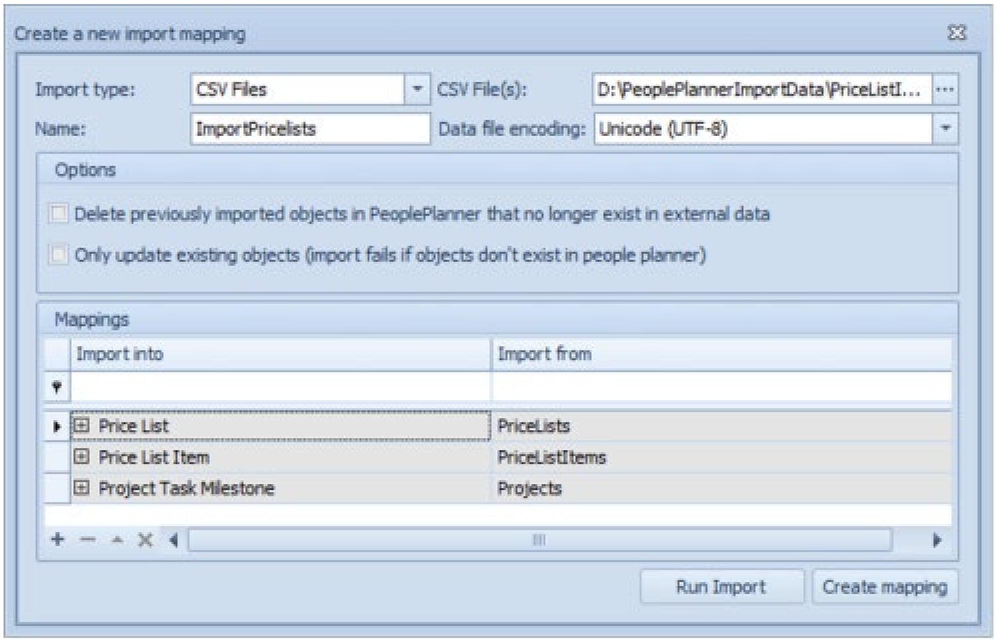
18. Verify that the fields have been mapped correctly.

    A special case is the **Kind** field; this field is mandatory, and you did not provide it with a value from the CSV file. Instead, you can set the default value to Project.

    > **Note:** This is, of course, only an option if the Projects.csv file contains projects, but no tasks or milestones.

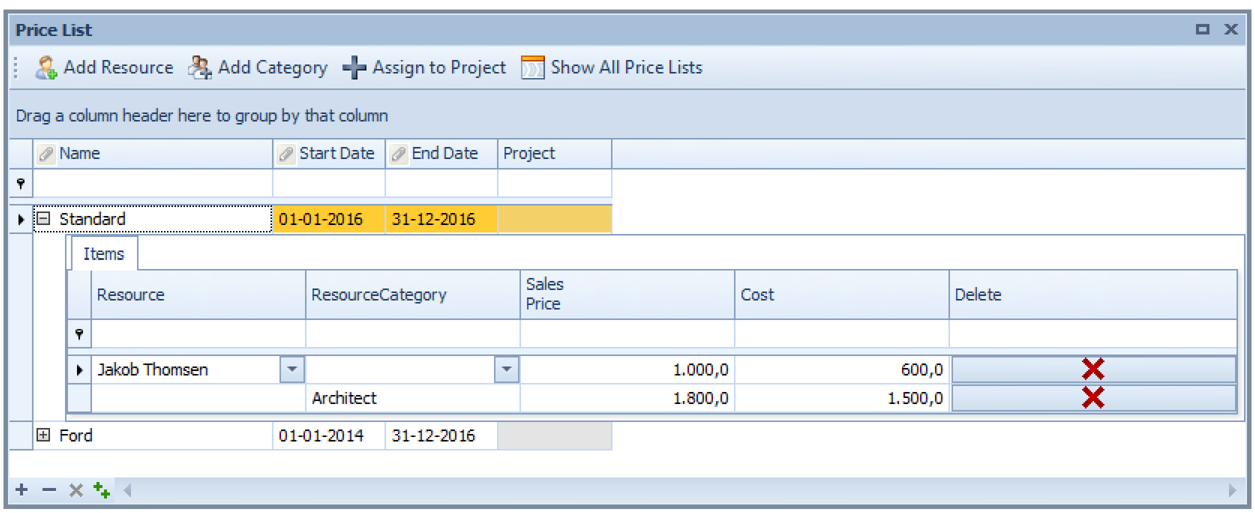


19. Click the **Save** button.

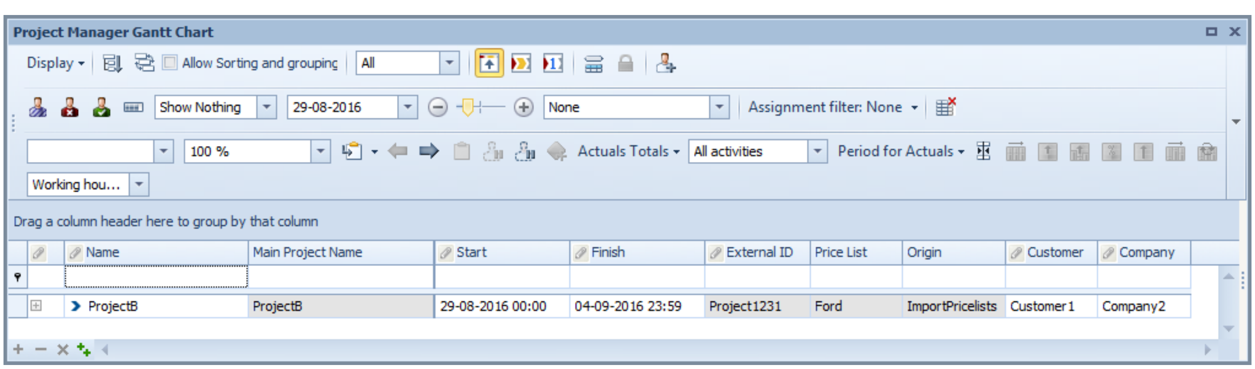


20. Click the **Create Mapping** button to save the full Import Mapping.

If you run this example, you get two price lists.



In addition, the price lists have been assigned to the projects.

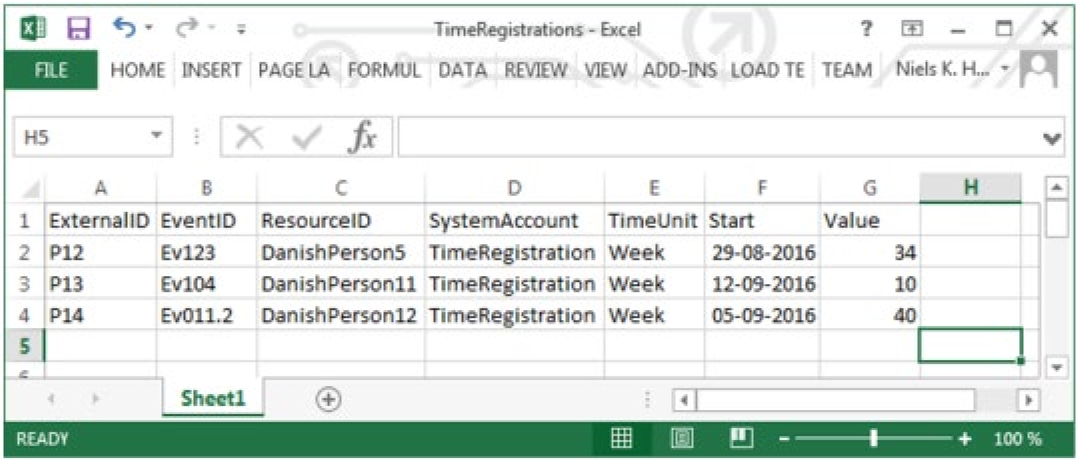


Import Time Registrations

The integration between People Planner and Maconomy supports import of Actuals, that is, of time registrations.

However, if the time registrations are stored in an external system, such as in a different ERP system, and you can export them from there to an Excel file, you can define an Import Mapping to import them into People Planner.

This is the simplest format that you can use.



ExternalID	EventID	ResourceID	SystemAccount	TimeUnit	Start	Value
P12	Ev123	DanishPerson5	TimeRegistration	Week	29-08-2016	34
P13	Ev104	DanishPerson11	TimeRegistration	Week	12-09-2016	10
P14	Ev011.2	DanishPerson12	TimeRegistration	Week	05-09-2016	40

This format assumes that:

- EventID — You know the ExternalID of the events (such as tasks) where the time is registered.
- ResourceID — You know the ExternalID of the employees who registered the time.
- The time should go into the TimeRegistration account.
- The TimeUnit must be one of the following: Day, Week, or Month. In addition, the Start date should be the first date in the period.

Note: People Planner uses the European standard, where the week starts on Monday.

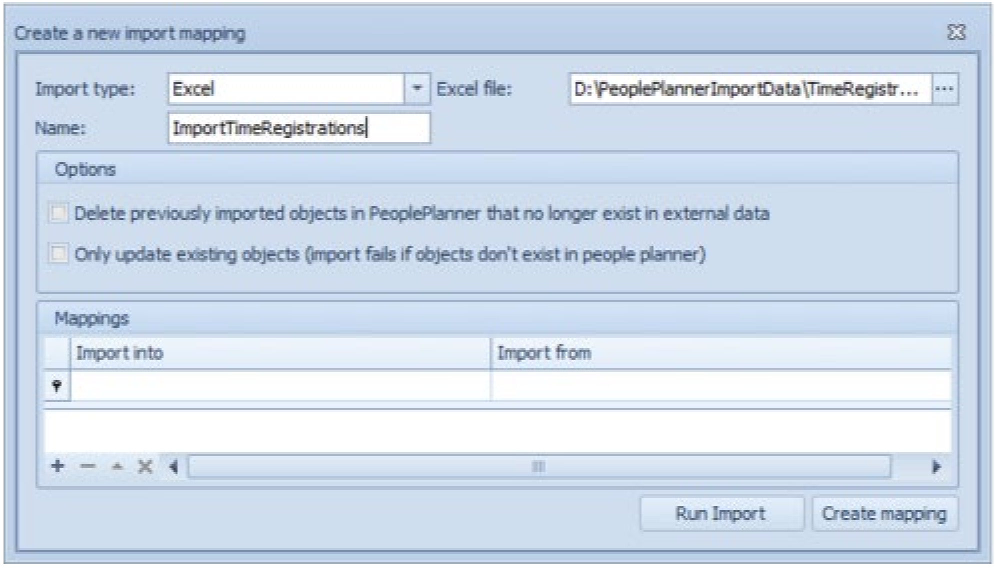
One way to know the external IDs could be because you already have import mappings that import the tasks and the resources.

Events and resources that are created directly from People Planner do not have external IDs. However, you could assign IDs to them by some other means, such as directly from the PG and RG or through a SQL script, and you would then be able to use those IDs.

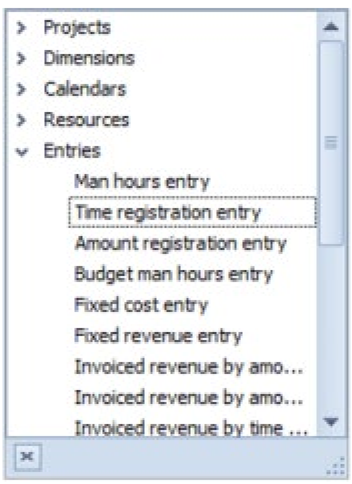
To create the Import Mapping:

1. Navigate to **Views** » **Tasks** » **Mappings**.
2. Click the **New** button.
3. Choose **Excel** from the drop-down list for the **Import type** field.
4. Choose your Excel file from the drop-down list for the **Excel file** field.

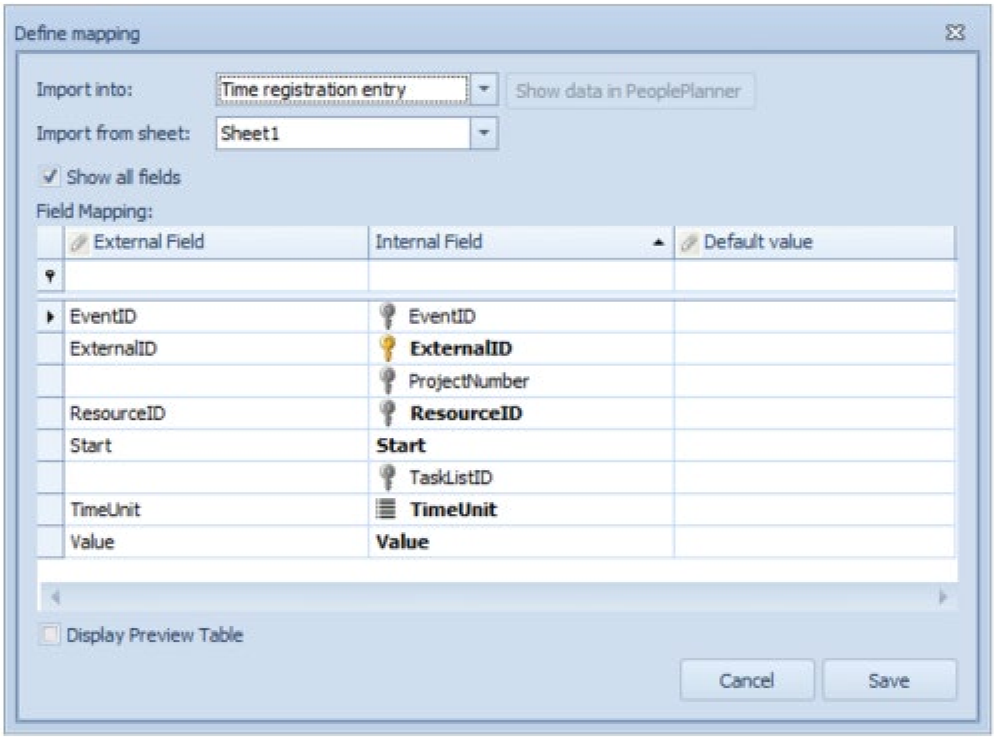
5. Enter a name for the Import Mapping in the **Name** field.



6. Click the **+** button in the lower-left corner.
7. Choose **Entries » Time Registration Entry** from the drop-down list for the **Import into** field.



8. Verify that the fields have been mapped correctly.



9. Click the **Save** button to save the mapping.
10. Click the **Create Mapping** button to save the Import Mapping.

You can now continue with creating a Task Specification and a Scheduled Task on top of this.

If the resource is not already assigned to the task, the Import Mapping does this automatically. This is in contrast with how you would enter time registrations via the PG; in that case, you would first need to assign the resource before you could start entering values in the time registration cells.

Import Calendars

Both People Planner and Maconomy support using calendars, but because they do this in different ways, there is no easy and sure way to define an Import Mapping. The following is an attempt at this, but it is based on certain assumptions that may or may not hold in a particular installation.

People Planner uses the calendars for calculating the capacity of resources. This means that the calendar functionality is used extensively throughout the RG and elsewhere in the user interface. People Planner optimizes its capacity calculations by attempting to reuse the results of the calculations whenever the resources use the same calendars.

There are three types of calendars in People Planner: Work Week Hours, Common Calendars, and the individual Resource Calendars. They form a hierarchy from the most general Work Week Hours calendars to the most specific Resource Calendars. The capacity of a resource is calculated from a combination of all three calendars.

Calendar	What it Handles
Work Week Hours	▪ Normal work hours ▪ Part-time work week ▪ Weekends
Common Calendars	National holidays, one Common Calendar per nationality (country)
Resource Calendar	Absences; one calendar per resource

For maximum effectiveness, you should handle any time off at the topmost possible level; for example, you should avoid marking weekends as non-working days in the Common Calendars. First, there is no need if they are already marked for 0 hours in the Work Week Hours calendar. Second, it is actually harmful to system performance to have unnecessary date entries in the Common Calendars (or in the Resource Calendars).

Importing Calendars

This example shows how to import Work Week Hours and Common Calendars. It is in principle also possible to import Resource Calendars, but People Planner already has an import for this, in the integration that imports absences.

Note: The **Absence Import** does not import the absences into the individual Resource Calendars. Instead, it imports them as bookings on a special Absence project.

The following example uses SQL commands to retrieve the calendar information from the Maconomy database. If you do not have direct access to the database, an alternative is to create MScript scripts—basically just wrappers for the SQL commands—that export the calendar data as CSV files. You can schedule these scripts to run at certain times.

Warning: You should always be careful with accessing the database directly as in this example. There is no guarantee that table and column names will not change from one release to another. If they do, the consequence is that the integration will break the next time that you update the Maconomy installation. You should at the very least make sure to document your integration properly.

Note: The Maconomy database is case-sensitive, and this is why the table and column names are capitalized.

Work Week Hours Calendars

The first SQL command retrieves the Work Week Hours calendars from Maconomy.

```
SELECT
  MIN(ROWID) AS EXTERNALID,
  'WorkWeekHours' + CAST(MIN(ROWID) AS VARCHAR(10)) AS NAME,
  FIXEDWORKINGTIMEMONDAY AS MONDAY,
  FIXEDWORKINGTIMETUESDAY AS TUESDAY,
  FIXEDWORKINGTIMEWEDNESDAY AS WEDNESDAY,
  FIXEDWORKINGTIMETHURSDAY AS THURSDAY,
```

```
  FIXEDWORKINGTIMEFRIDAY AS FRIDAY,
  FIXEDWORKINGTIMESATURDAY AS SATURDAY,
  FIXEDWORKINGTIMESUNDAY AS SUNDAY
FROM
  EMPLOYEE
WHERE
  TRANSFERTOPEOPLEPLANNER = 1
GROUP BY FIXEDWORKINGTIMEMONDAY,
  FIXEDWORKINGTIMETUESDAY,
  FIXEDWORKINGTIMEWEDNESDAY,
  FIXEDWORKINGTIMETHURSDAY,
  FIXEDWORKINGTIMEFRIDAY,
  FIXEDWORKINGTIMESATURDAY,
  FIXEDWORKINGTIMESUNDAY
```

In Maconomy, each employee has his or her own work week definition; therefore, you query the EMPLOYEE table. In spite of this, many of the calendars are actually identical, and to avoid duplicates, you use the GROUP BY statement. The only remaining problem is to give the calendar an External ID; you use the minimum ROWID for each group of duplicate calendars for this. You only want to get the calendars of employees who are actually imported into People Planner, and you use the WHERE statement for this.

Common Calendars

The second SQL command retrieves a list of Common Calendars from Maconomy.

```
SELECT
  WEEKCALENDARNUMBER AS EXTERNALID,
  WEEKCALENDARNUMBER AS NAME,
  'Common' AS KIND
FROM
  WEEKCALENDARHEADER
```

In People Planner, a calendar can be either a Common Calendar or a Resource Calendar. The KIND field indicates that you are to import the calendars as true Common Calendars.

> **Note:** When you create the Import Mapping, an alternative could be to use the Default Value column to set this value.

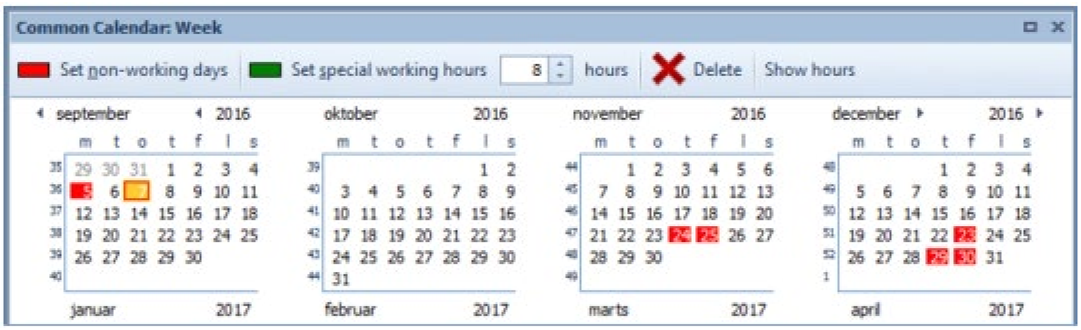
The third SQL command retrieves the individual calendar entries.

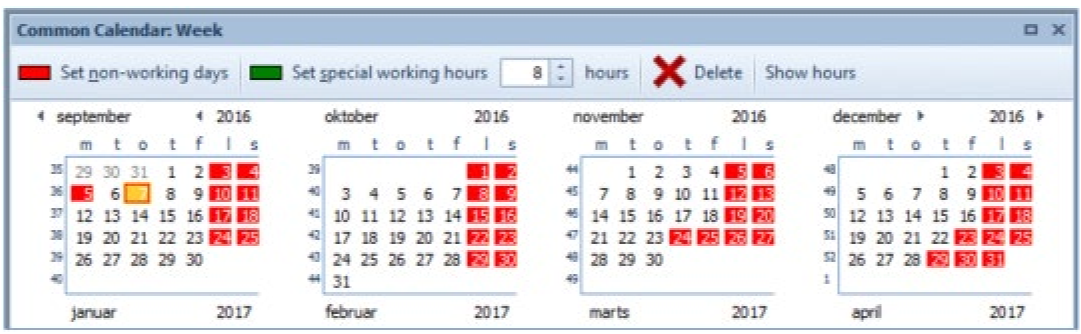
```
SELECT
  ROWID AS EXTERNALID,
  WEEKCALENDARNUMBER AS CALENDARID,
  THEDATE AS STARTTIME,
  THEDATE AS ENDTIME,
  FIXEDWORKINGTIME AS HOURSPERDAY
```

```
FROM
  DAYCALENDARLINE
WHERE
  DATENAME(WEEKDAY, THEDATE) <> 'Saturday'
  AND DATENAME(WEEKDAY, THEDATE) <> 'Sunday'
  AND FIXEDWORKINGTIME <= 4
```

The interesting part is the WHERE statement. Assuming that the employees usually are off on the weekends, and that this is already covered by the Work Week Hours calendars, there is no need to include them again.

If you leave out this part, the weekends are marked as non-working days in the Common Calendar. The following two figures illustrate the difference.





The last part of the WHERE statement, FIXEDWORKINGTIME <= 4, ensures that you only get all of the dates where the employee is working less than full time. The value of 4 is a bit arbitrary, and you can change it to fit your needs, but if you do not have this part, you also get all of the dates where the employee is working full time—that is, for 8 hours.

Resources

The fourth and final SQL command retrieves the employees and maps them with a Work Week Hours calendar and a Common Calendar.

```
SELECT
  EMPLOYEENUMBER AS EXTERNALID,
  EMPLOYEENUMBER AS EMPLOYEENUMBER,
  NAME1 AS NAME,
  (
    SELECT MIN(ROWID)
    FROM EMPLOYEE AS E2
```

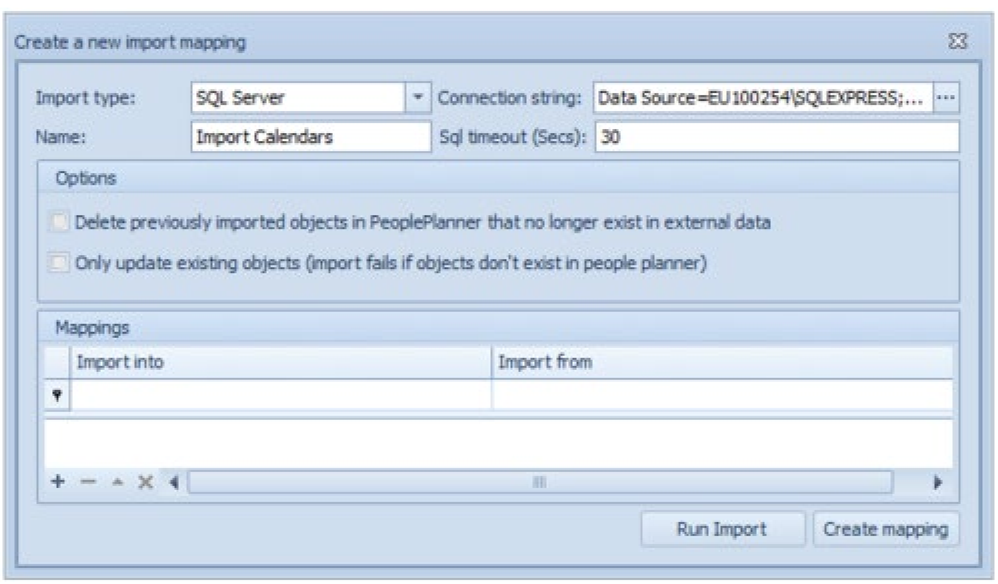
```
    WHERE E1.FIXEDWORKINGTIMEMONDAY = E2.FIXEDWORKINGTIMEMONDAY
      AND E1.FIXEDWORKINGTIMETUESDAY = E2.FIXEDWORKINGTIMETUESDAY
      AND E1.FIXEDWORKINGTIMEWEDNESDAY = E2.FIXEDWORKINGTIMEWEDNESDAY
      AND E1.FIXEDWORKINGTIMETHURSDAY = E2.FIXEDWORKINGTIMETHURSDAY
      AND E1.FIXEDWORKINGTIMEFRIDAY = E2.FIXEDWORKINGTIMEFRIDAY
      AND E1.FIXEDWORKINGTIMESATURDAY = E2.FIXEDWORKINGTIMESATURDAY
      AND E1.FIXEDWORKINGTIMESUNDAY = E2.FIXEDWORKINGTIMESUNDAY
  ) AS WORKWEEKHOURSID,
  WEEKCALENDARNUMBER AS COMMONCALENDARID
FROM
  EMPLOYEE AS E1
WHERE
  TRANSFERTOPEOPLEPLANNER = 1
```

Create the Import Mapping

Now that you have the four SQL commands, you can create an Import Mapping.

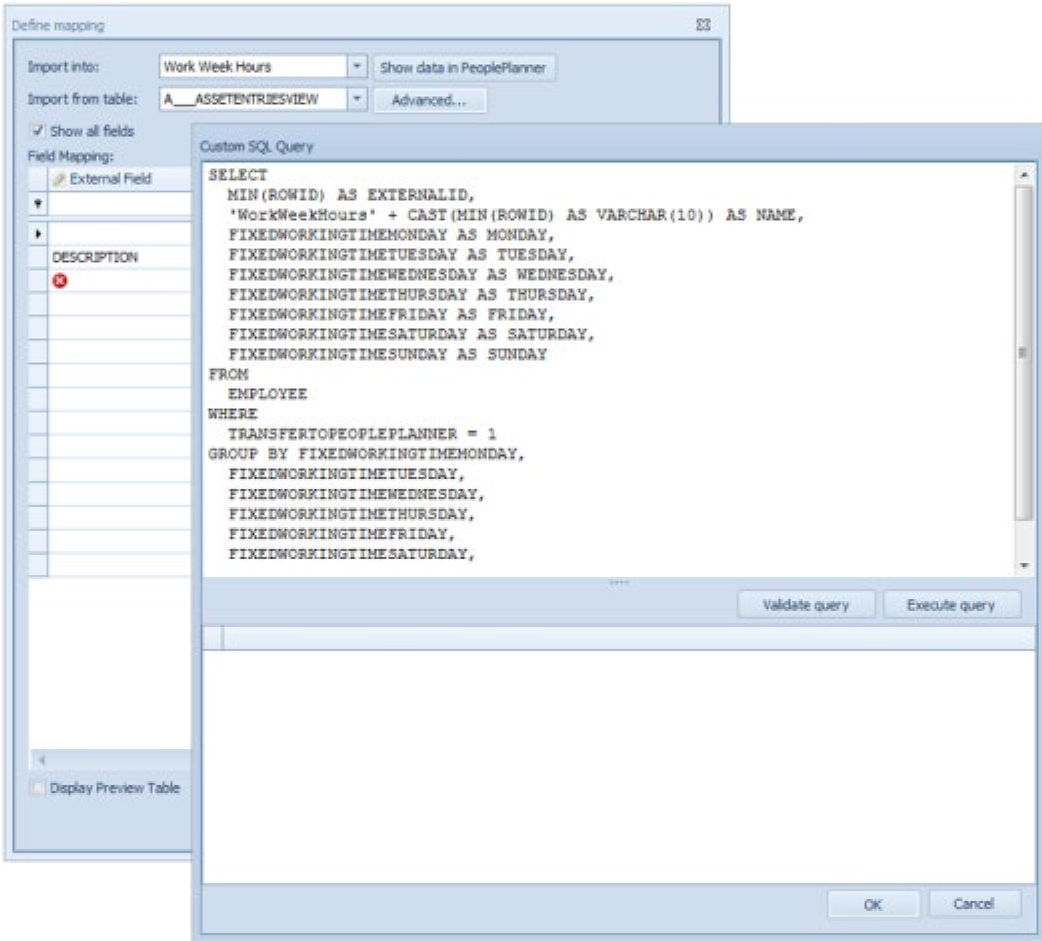
To create this Import Mapping:

1. Navigate to **Views » Tasks » Mappings**.
2. Click the **New** button.
3. Choose **SQL Server** from the drop-down list for the **Import type** field.
4. Choose the Maconomy database from the drop-down list for the **Connection string** field.
5. Enter a name for the Import Mapping in the **Name** field.



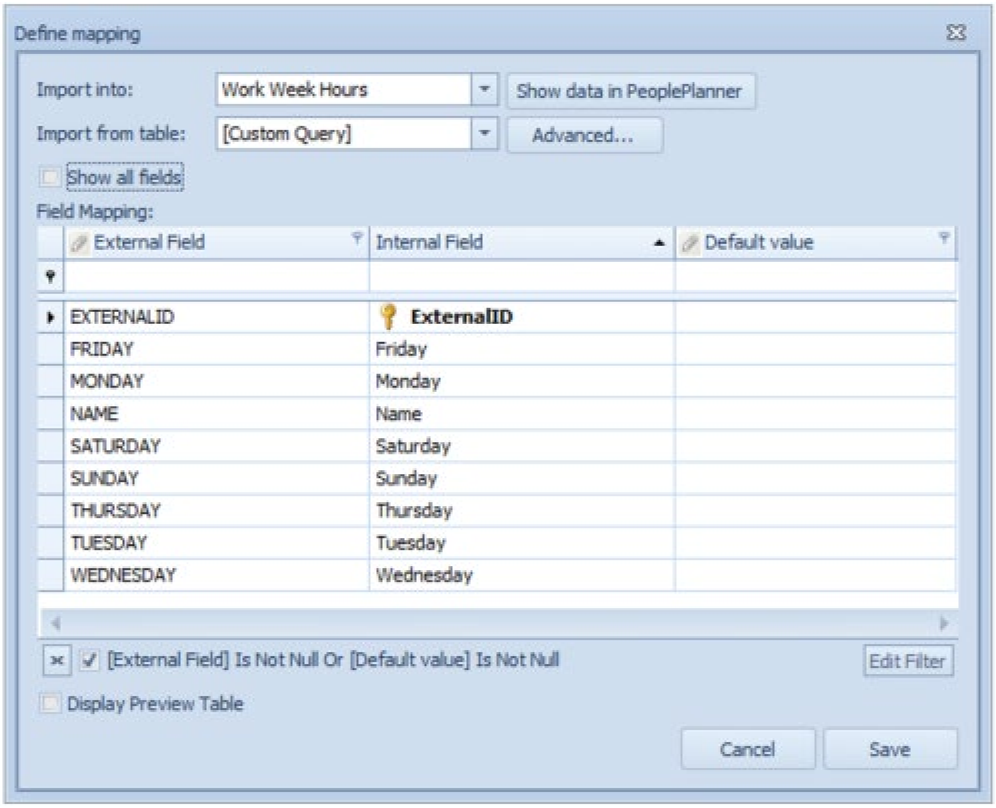
6. Click the **+** button near the lower-left corner of the view to add your first mapping. You use this mapping to import the Work Week Hours calendars.
7. Choose **Calendars » Work Week Hours** from the drop-down list for the **Import into** field.

8. Click the **Advanced …** button.
9. Enter your first SQL query in the Custom SQL Query view.



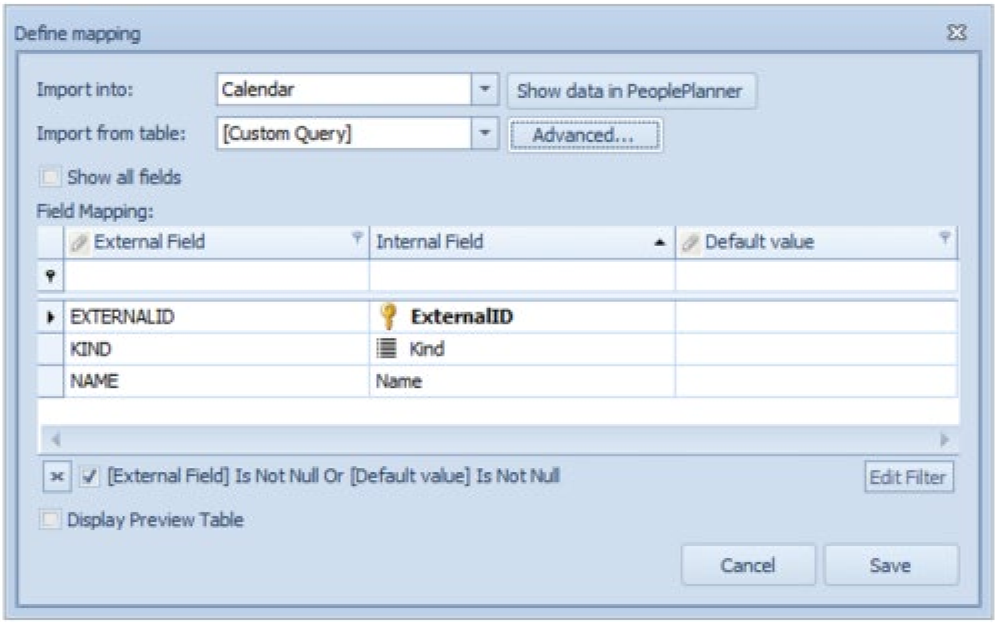
10. Click the **OK** button.

11. Verify that the fields are mapped correctly.

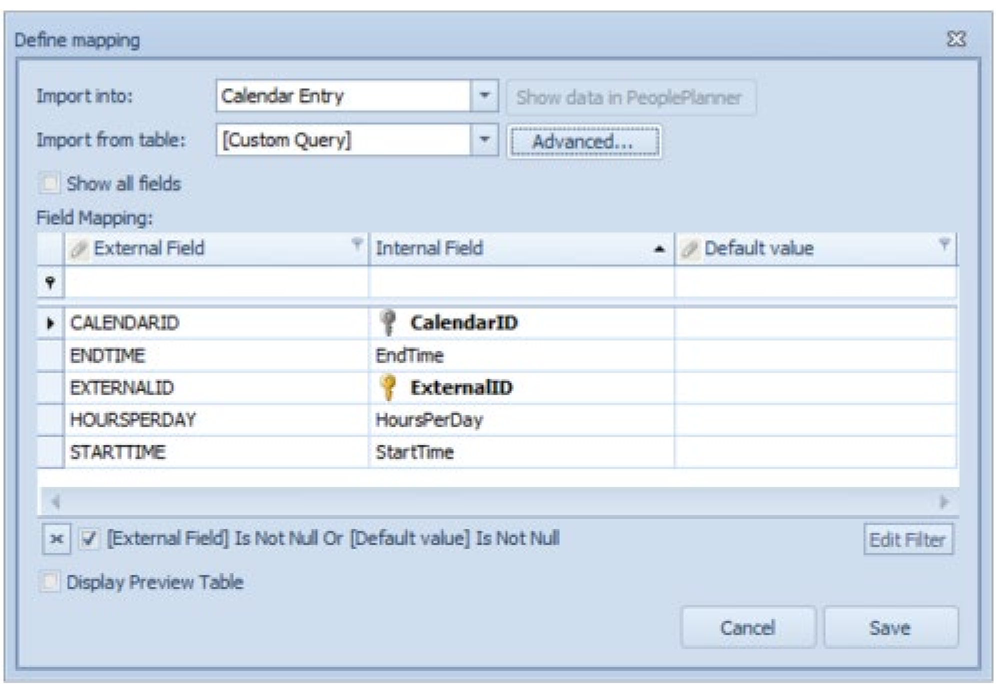


12. Click **Save**.
13. Click the **+** button near the lower-left corner of the view to add your second mapping. Use this mapping to import the list of Common Calendars.
14. Choose **Calendars » Calendar** from the drop-down list for the **Import into** field.
15. Click the **Advanced …** button.
16. Enter the second SQL command in the Custom SQL Query view.
17. Click the **Save** button.

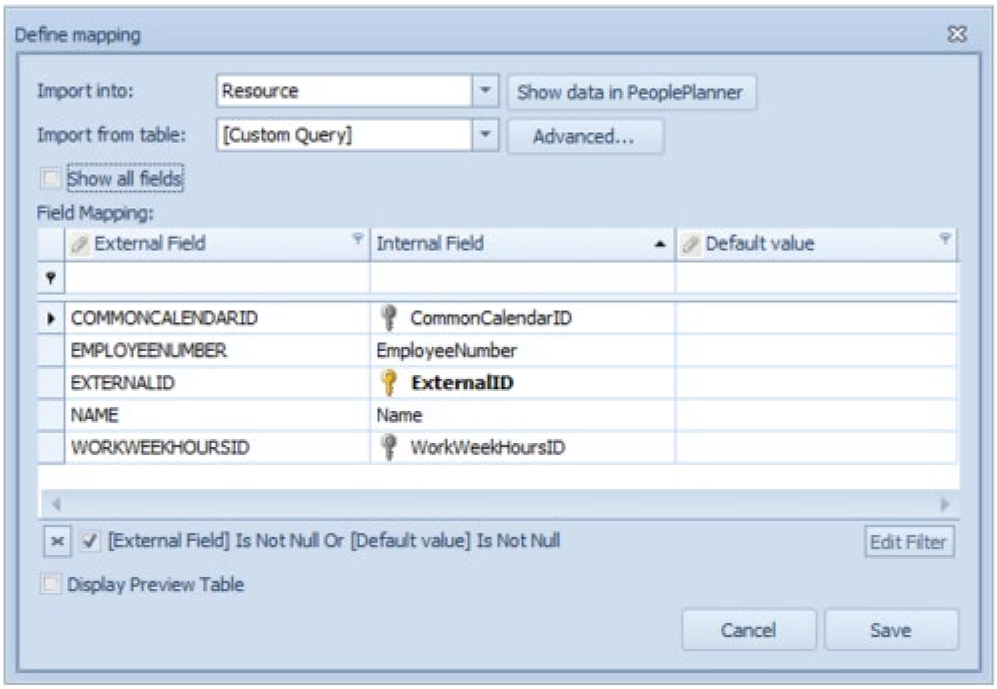
18. Verify that the fields are mapped correctly.



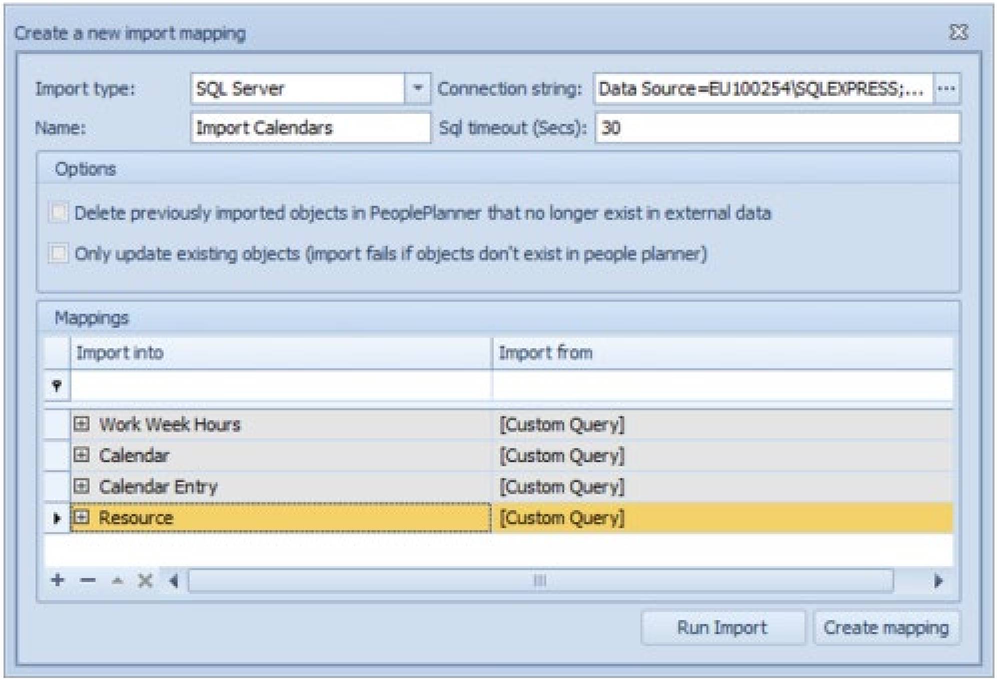
19. Click the **Save**-button.
20. Click the **+** button near the lower-left corner of the view to add the third mapping. You use this mapping to import the individual entries of the Common Calendars.
21. Choose **Calendars » Calendar Entry** from the drop-down list for the **Import into** field.
22. Click the **Advanced …** button.
23. Enter the third SQL command in the Custom SQL Query view.
24. Click the **Save** button.
25. Verify that the fields are mapped correctly.



26. Click the **Save**-button.
27. Click the **+** button near the lower-left corner of the view to add the fourth and final mapping. You use this mapping to import the employees and for mapping them to both a Work Week Hours calendar and a Common Calendar.
28. Choose **Resources » Resource** from the drop-down list for the **Import into** field.
29. Click the **Advanced …** button.
30. Enter the third SQL command in the Custom SQL Query view.
31. Click the **Save** button.
32. Verify that the fields are mapped correctly.



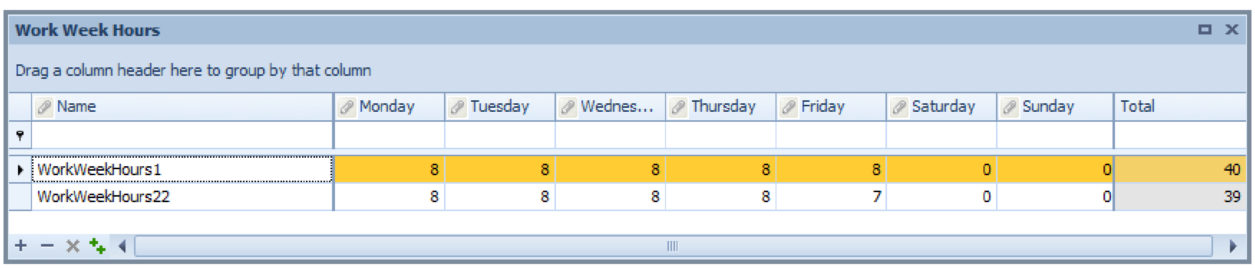
33. Click the **Save**-button.



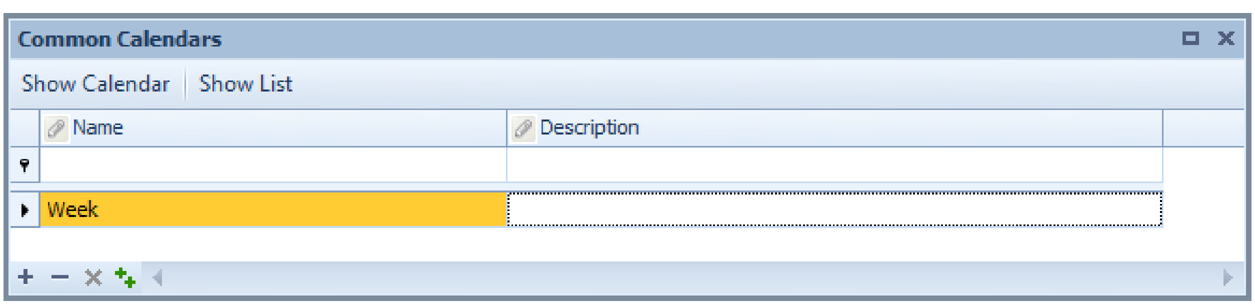
34. Click the **Create Mapping** button to save everything that you have done.

When you run the Import Mapping, the result should look the following.

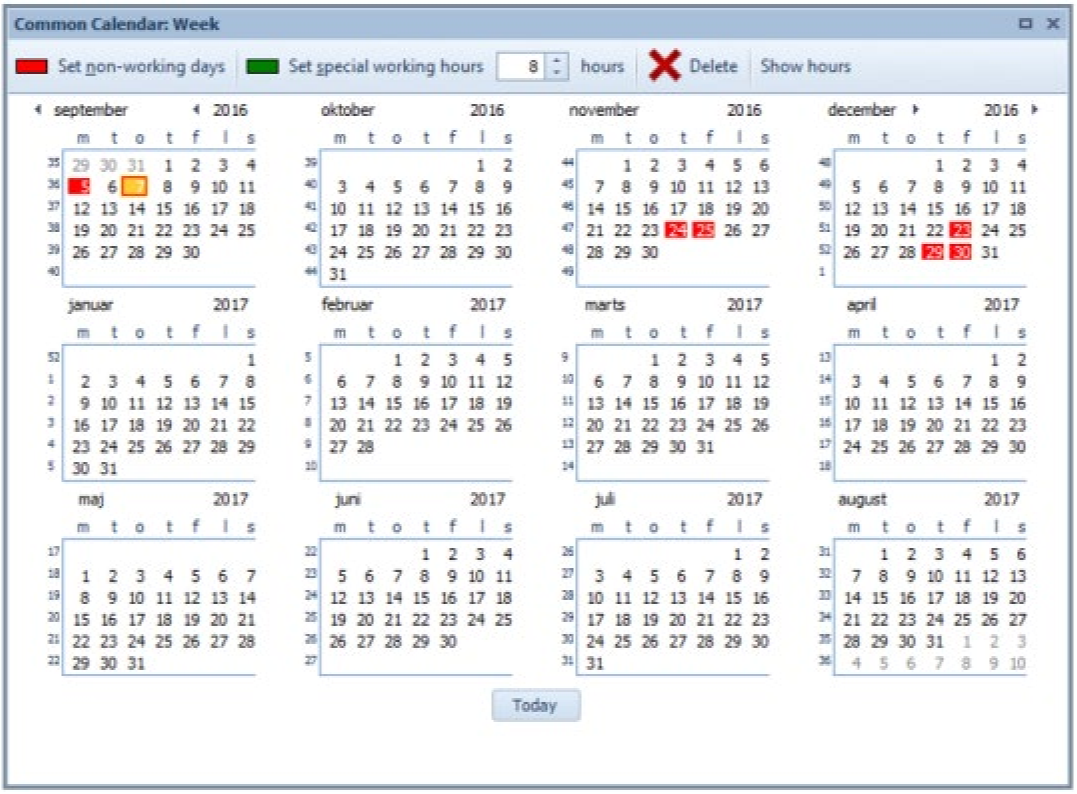
Two Work Week Hours calendars are imported. Most of the resources are using the calendar named WorkWeekHour1, and a single resource is using the other calendar.



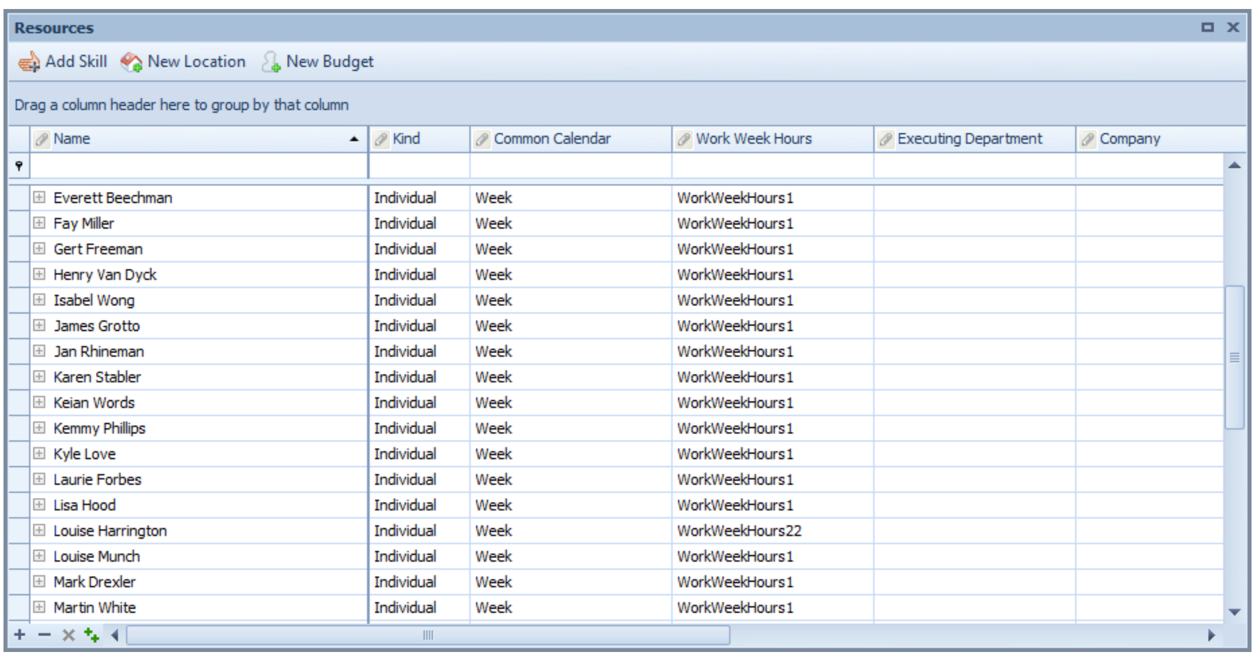
A single Common Calendar is imported.



If you select the calendar and click the Show Calendar button, People Planner shows you the details of the calendar.



Finally, the employees have been imported, and each has been mapped to both a Common Calendar and a Work Week Hours calendar.



Name	Kind	Common Calendar	Work Week Hours	Executing Department	Company
Everett Beechman	Individual	Week	WorkWeekHours1		
Fay Miller	Individual	Week	WorkWeekHours1		
Gert Freeman	Individual	Week	WorkWeekHours1		
Henry Van Dyck	Individual	Week	WorkWeekHours1		
Isabel Wong	Individual	Week	WorkWeekHours1		
James Grotto	Individual	Week	WorkWeekHours1		
Jan Rhineman	Individual	Week	WorkWeekHours1		
Karen Stabler	Individual	Week	WorkWeekHours1		
Keian Words	Individual	Week	WorkWeekHours1		
Kemmy Phillips	Individual	Week	WorkWeekHours1		
Kyle Love	Individual	Week	WorkWeekHours1		
Laurie Forbes	Individual	Week	WorkWeekHours1		
Lisa Hood	Individual	Week	WorkWeekHours1		
Louise Harrington	Individual	Week	WorkWeekHours22		
Louise Munch	Individual	Week	WorkWeekHours1		
Mark Drexler	Individual	Week	WorkWeekHours1		
Martin White	Individual	Week	WorkWeekHours1		

Integration between People Planner and Exchange/Outlook

This integration synchronizes allocations (bookings) and to-do's between People Planner and Exchange. Users can see them as assignments and tasks in their Outlook clients. In addition, users can create their own bookings from the Outlook calendar, for example, to request an absence.

The purpose is to allow People Planner users to use Outlook as their personal planning tool. This means that the people in an organization can see which projects they are booked on, and they can book themselves on People Planner projects.

People Planner supports Exchange 2010, and Outlook 2010. People Planner also supports Office 365 when the included Exchange server is Exchange 2010.

Installing the integration between People Planner and Exchange/Outlook involves the following steps:

1. Install the People Planner Outlook Web Service.
2. Configure the Exchange server to accept synchronization connections from People Planner.
3. Configure a Scheduled Task in People Planner to synchronize with the Exchange server.
4. Install the People Planner Outlook AddIn on each user's computer.

Configure the Exchange Server

Requirements

The requirements for the People Planner Exchange integration are as follows:

- Microsoft Exchange 2010
- Microsoft Exchange Web Services (EWS)

Note: No tests have been performed in organizations where there is more than one Exchange server.

Installation

The installation of the Exchange Server 2010 system depends on the company infrastructure and setup requirements, which are not covered in this document.

The requirement for the People Planner Exchange integration is the Exchange Web Services API, which is included in a default installation of Exchange Server.

Example

The following is an example of an Exchange Server installation:

1. To install required components before installing Exchange Server, run the following scripts:
    a. ServerManagerCmd -i RSAT-ADDS

A reboot is required after you run the preceding script.

b. ServerManagerCmd -i Web-Server
c. ServerManagerCmd -i Web-ISAPI-Ext
d. ServerManagerCmd -i Web-Metabase
e. ServerManagerCmd -i Web-Lgcy-Mgmt-Console
f. ServerManagerCmd -i Web-Basic-Auth
g. ServerManagerCmd -i Web-Digest-Auth
h. ServerManagerCmd -i Web-Windows-Auth
i. ServerManagerCmd -i Web-Dyn-Compression
j. ServerManagerCmd -i PowerShell

2. Install Exchange Server with the following roles:
   a. Mailbox
   b. Hub transport
   c. Client Access
3. Ensure that a network request of **autodiscover.[FullDomainName]** resolves to the installed Exchange server.

Configuration

The People Planner Exchange integration uses a Windows Domain user to connect to the Exchange Server, which has access to create/edit/read appointments in the mailboxes for the Exchange users. The user that is used for the People Planner Exchange integration is not required to have a mailbox.

For the maintenance of the access to the users' mailboxes in the People Planner Exchange integration, Deltek recommends that you create a Windows Domain Group and make all users members of that group. When a resource is enabled for the Exchange Synchronization in People Planner, the same user should be added to the Windows Domain Group and removed when the Exchange Synchronization is disabled.

The initial setup of the Exchange Server depends on the version of Exchange, and is described in the following.

Configure Exchange 2010 and Exchange 2013

To configure Exchange 2010 and Exchange 2013:

1. Create a Windows Domain user named **PPexchange** (used in the following example).
2. Create a Windows Domain group named **PeoplePlannerExchangeUsers** (used in the following example), and make users/mailbox users members of the group that has the Exchange Synchronization enabled in the Resources view in the People Planner system.
3. On the Exchange Server, create a Management Scope and Role Assignment that will allow the **PPexchange** user to impersonate other users and be able to modify the users' mailboxes.

   You do this by running the following script on the Exchange Server in the Exchange Management Shell:

```
$PPuser = "PPexchange"

$PPgroup = "CN=PeoplePlannerExchangeUsers,CN=Users,DC=<theServer>,DC=com"

new-ManagementScope -name:PeoplePlannerExchange -
RecipientRestrictionFilter:

"MemberOfGroup -eq '$PPgroup'"

new-ManagementRoleAssignment -Name:PeoplePlannerExchangeRole –

Role:ApplicationImpersonation -User:$PPuser –

CustomRecipientWriteScope:PeoplePlannerExchange
```

> **Note:** The **PeoplePlannerExchange** and **PeoplePlannerExchangeRole** names are used as example names in the preceding script.

The value that is used for the $PPgroup must be the Active Directory Distinguished Name (ADDN) of the PeoplePlannerExchangeUsers security group. To get this, use the following dsquery command:

```
dsquery group "People*"
```

If the new-ManagementScope and new-ManagementRoleAssignment commands have been run with incorrect values, you might need to remove the incorrect ones as part of correcting the problem:

```
Remove-ManagementRoleAssignment -Identity PeoplePlannerExchangeRole
```

```
Remove-ManagementScope -Identity PeoplePlannerExchange
```

Configure Office 365

People Planner 3.7 supports Office 365 as long as the Exchange server is Exchange 2010.

As of the publication of this document, the Exchange server that is included in Office 365 is Exchange 2010. Office 365 has an update cycle of 90 days, and with the release of Exchange 2013 being imminent, it is uncertain when Microsoft will make the transition.

The following assumes that Office 365 uses Exchange 2010. The steps are the same as those that were described in the previous section, with one possible exception.

In the Microsoft data centers, certain objects are consolidated to save space. When you try to use Windows PowerShell to modify one of these objects for the first time, you might encounter the following error message:

- This operation is not allowed for the organization with disabled customizations. To enable this operation, you need to execute Enable-OrganizationCustomization task first.

This is likely to happen when you run the new-ManagementRoleAssignment-command. In this case, you must run the following extra command:

- Enable-OrganizationCustomization

You only need to run this once. On subsequent runs, it will generate the following error message:

- This operation is not available in the current service offer.

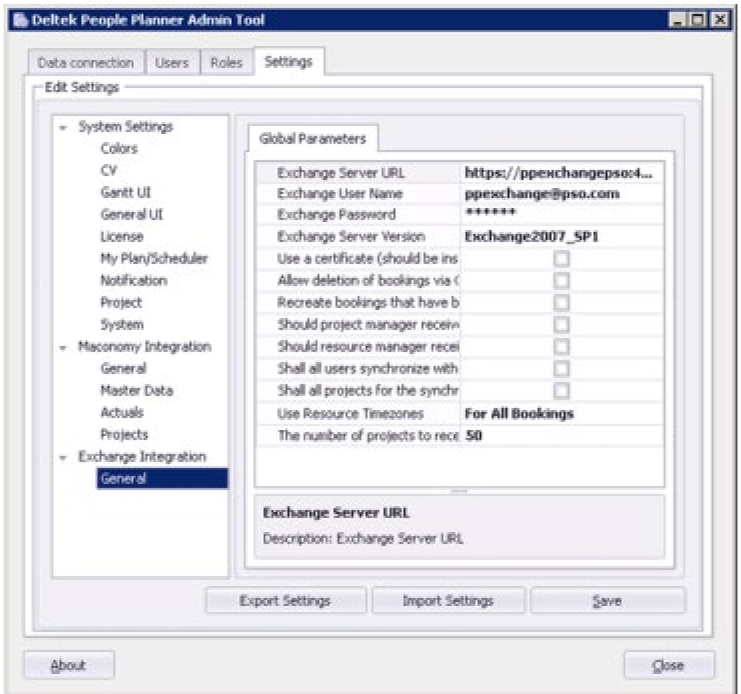
Configure People Planner

This task involves setting up a scheduled task to take care of the synchronization. This in turn requires that the People Planner Service is installed.

Tip: See Install the People Planner Service for installation steps.

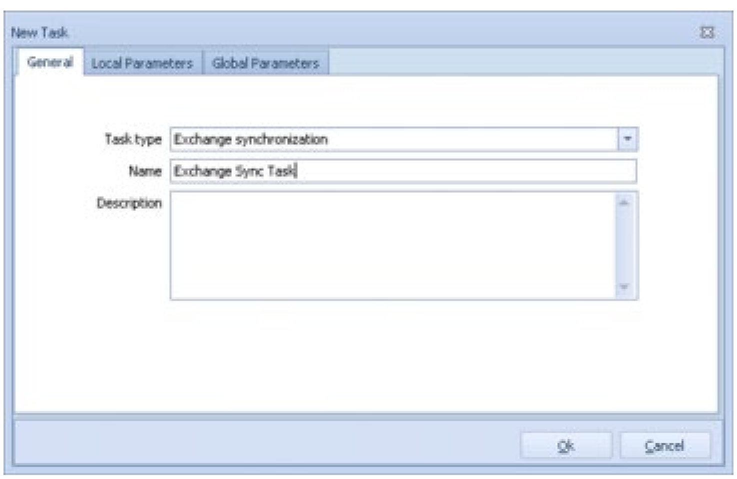
To set up the Exchange Synchronization:

1. Start the Admin Tool and go to the **Settings** tab.
2. Use the Settings tab to set the values for the Exchange Synchronization. The following figure shows an example.



Note: You must use the People Planner application to create the scheduled task to perform the synchronization with Exchange. The values that you used for the settings in the Admin Tool appear in the People Planner application when you go to create the scheduled task; however you cannot change them in the application.

3. In the Task Specification view, double-click on the **New Task** view to create a Task Specification for the Exchange Synchronization, as the following example figure shows.

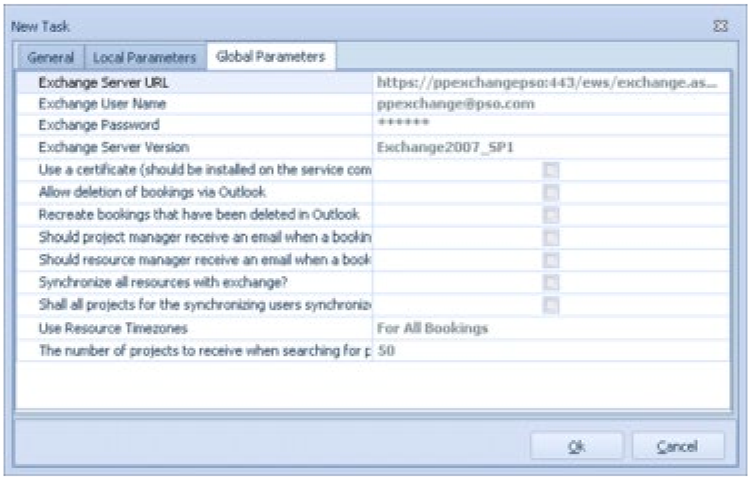


4. Enter the required information.

   In the preceding figure, the task type has been selected as Exchange synchronization.

5. Click the **Local Parameters** tab to set parameters—such as the maximum number of items to request at a time, the number of days to include, and so on—for this task specification.

6. Click the **Global Parameters** tab to review the parameters that were set in the Admin Tool to make sure that they are correct. You cannot change these values here; you must set them in the Admin Tool. The following figure shows an example.



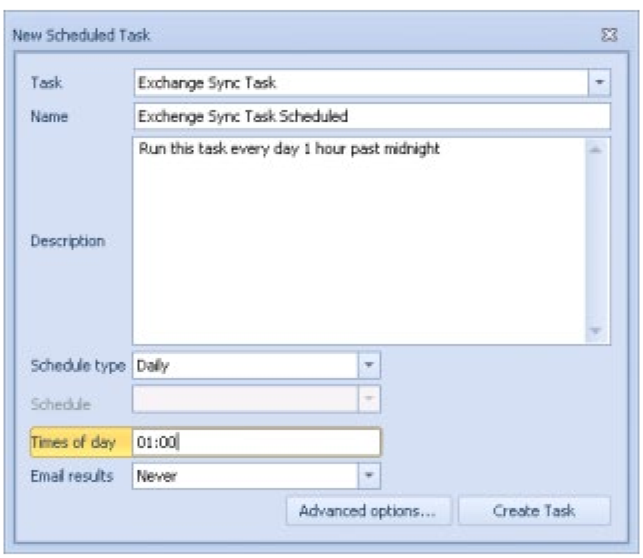
The **Exchange Server URL** field should contain the fully qualified domain name suffixed by the path to the Exchange web services (usually ews/exchange.asmx).

You must have set up a special Exchange user name and password for the Exchange integration; see Configure the Exchange Server. The **Exchange User Name** and **Exchange Password** fields should contain that user name and password, respectively.

7. Click **Ok**.

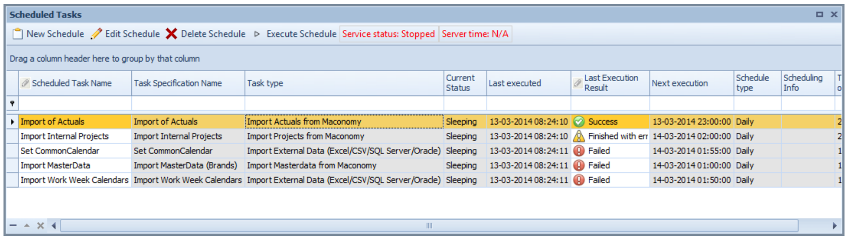
8. Open the **Scheduled Tasks** view and click the **New Schedule** button.

   This opens the **New Scheduled Task** view so that you can create a scheduled task for the Exchange Synchronization that is based on the task specification that you just created. The following figure shows an example.



9. Enter the information, and then click **Create Task**.

10. After the scheduled task (job) has been created, click **Execute Schedule** to start the job within one minute.



The **Last Execution Result** field contains **Success** if the job completes successfully.

Install the People Planner Outlook Web Service

The Outlook Web Service provides the Outlook AddIn with projects for the Outlook user. It is installed on a web server as a Windows Communication Foundation service and uses the user's Windows credentials to authenticate the request.

Note: The Outlook Web Service was previously called People Planner Exchange Service.

Prerequisites for Outlook Web Service

See Prerequisites for Web Components to ensure that the prerequisites are in place before you install the Outlook Web Service.

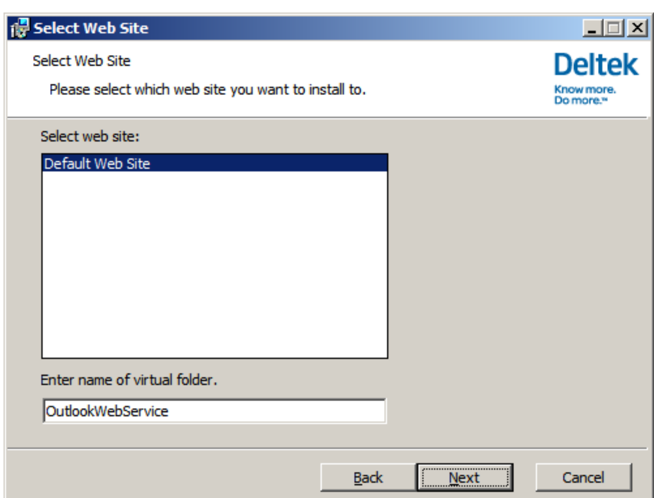
Installation

To install the Outlook Web Service:

1. Run the **Deltek People Planner Outlook Web Service version 3.7.msi** installer.

   When doing the installation, you must select a web site and enter the virtual directory under which the service should be installed.

   Note: The name of the virtual folder is needed during the installation of the Outlook AddIn.



2. Click **Next** to continue with the installation.
3. Confirm that the domain users have read access to the installation site.
4. Complete the installation.
5. Copy a **DataConnection.xml** file from a People Planner application installation to bin/Settings/.
6. In the **web.config** file, confirm that the reference to **DataConnection.xml** is correct.

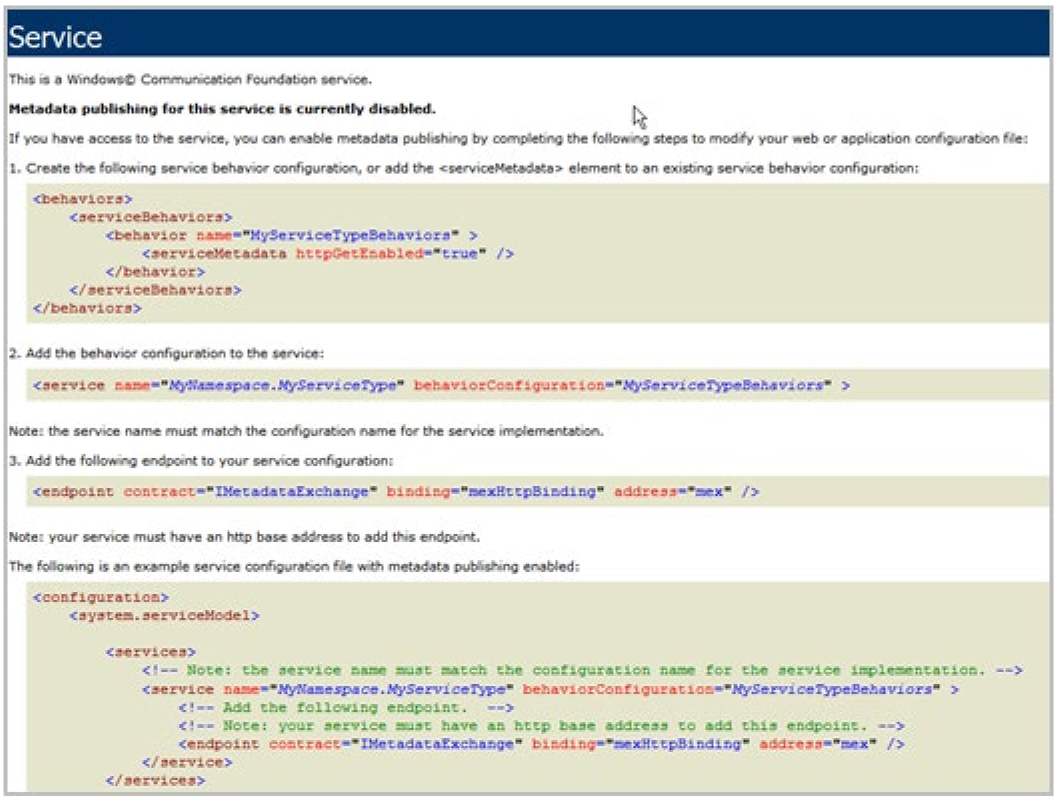
Test the Outlook Web Service

To test the Outlook Web Service:

1. Open Internet Explorer and enter the URL to the service:

   `http://<YourServer>/<VirtualFolder>/service.svc`

   If it was installed successfully, you should see something like the following example.



Service

This is a Windows© Communication Foundation service.

Metadata publishing for this service is currently disabled.

If you have access to the service, you can enable metadata publishing by completing the following steps to modify your web or application configuration file:

1. Create the following service behavior configuration, or add the <serviceMetadata> element to an existing service behavior configuration:

```
<behaviors>
    <serviceBehaviors>
        <behavior name="MyServiceTypeBehaviors" >
            <serviceMetadata httpGetEnabled="true" />
        </behavior>
    </serviceBehaviors>
</behaviors>
```

2. Add the behavior configuration to the service:

```
<service name="MyNamespace.MyServiceType" behaviorConfiguration="MyServiceTypeBehaviors" >
```

Note: the service name must match the configuration name for the service implementation.

3. Add the following endpoint to your service configuration:

```
<endpoint contract="IMetadataExchange" binding="mexHttpBinding" address="mex" />
```

Note: your service must have an http base address to add this endpoint.

The following is an example service configuration file with metadata publishing enabled:

```
<configuration>
    <system.serviceModel>

        <services>
            <!-- Note: the service name must match the configuration name for the service implementation. -->
            <service name="MyNamespace.MyServiceType" behaviorConfiguration="MyServiceTypeBehaviors" >
                <!-- Add the following endpoint.  -->
                <!-- Note: your service must have an http base address to add this endpoint. -->
                <endpoint contract="IMetadataExchange" binding="mexHttpBinding" address="mex" />
            </service>
        </services>
```

Install the People Planner Outlook Addin

The Outlook AddIn supports MS Outlook 2010.

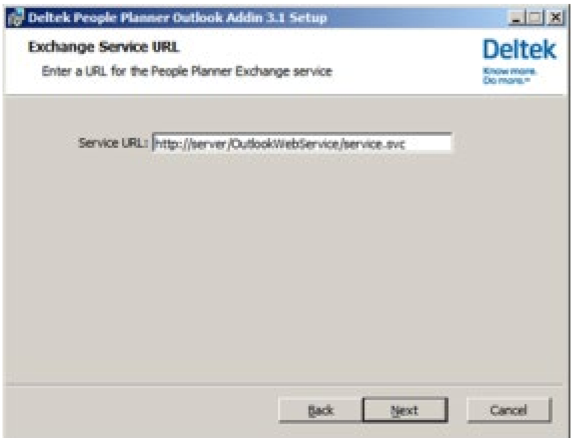
There are several prerequisites that must be met before you install the AddIn. The following prerequisites require Administrator rights on the computer to install; you only need to install them once.

- Microsoft .NET Framework 4.6.1.
- Microsoft Visual Studio Tools for Office Runtime 2010: vstor_redist.exe

- The file C:\Program Files\Common Files\microsoft shared\OFFICE12\MSO.DLL must be version 12.0.6520.5000 or newer. If it is not, it can be updated here: http://support.microsoft.com/kb/2289158.

The Outlook AddIn installer itself does not require administrative rights to install. It is installed for each user; each user who needs to use the AddIn must run the installer.

During the installation, on the Exchange Server URL screen, you must enter the URL to the People Planner Outlook Web Service.



> **Note:** The Outlook Web Service should be installed on the server before any users start installing their Outlook AddIns, so that they can know which URL to use here.

Integration between People Planner and Microsoft Project

Warning: This section is a draft.

With this integration, you can export a project in People Planner to Microsoft Project. You can also import a project from MS Project into People Planner.

Note: This import/export is purely manual. People Planner does not support a solution where a scheduled task can import from a file on nightly basis.

Export a Project from People Planner to MS Project

Warning: This section is a draft.

Import a Project from MS Project

Warning: This section is a draft.

Round Trip between People Planner and MS Project

Warning: This section is a draft.

People Planner External Views

To allow you to extract data directly from the People Planner database, we maintain a set of database views that you may query, called External Views. These database views are guaranteed to remain unchanged even if the underlying database schema is changed.

Other than querying the External Views, you should not set up any custom solutions to access of the People Planner database tables directly.

This is because:

- The People Planner development team reserves the right to change the database schema of the People Planner database with each new release. Tables may be added or removed, columns may be renamed or removed, and so on. If you base a custom solution to directly access the database, your solution might break in unforeseeable ways when you update your People Planner installation.
- The People Planner software maintains a complex layer of business logic, where the update of one table may impact other tables. If you update a table directly through a customization, the database may end up in an inconsistent state, with unpredictable behavior as a result.

Note: Beginning with People Planner 3.8, the External Views are automatically installed. Before 3.8, you had to install the External Views manually if you wanted to use them.

The database views are not updatable views, meaning that you can only use them to query the database, not to update it. If you want to update the database, you must instead use:

- Import Mappings, using Task Specifications and Scheduled Tasks.
- The People Planner API web service.

Basic Concepts

The External Views functionality consists of multiple database views, a database table, and a People Planner scheduled-task that must run regularly for the reporting table and related views to remain up-to-date.

The **Update Reporting Tables** task, as well as the overlying scheduled-task, must be configured manually.

Database Views

This section gives you an overview of the External Views.

Database View	Description	Master Data
ExAllocation	Returns the list of Allocations, such as Bookings. See also the **ExPost**-view for the list of all Posts, i.e. the entries for all of the People Planner accounts.	
ExBrand	Returns the list of Brands.	Yes
ExBusinessArea	Returns the list of Business Areas.	Yes

Database View	Description	Master Data
ExCalendar	Returns the list of Calendars. Calendars are either the Holiday Calendars or the individual Resource Calendars. See also the **ExCalendarEntry**-view for the list of entries in the Calendars. See also the **ExWorkWeekHours**-view for the list of Work Week Hour calendars.	Yes
ExCalendarEntry	Returns the list of Calendar-entries, such as the entries for special holidays. See also the **ExCalendar**-view for the list of Calendars.	Yes
ExCompany	Returns the list of Companies.	Yes
ExCountry	Returns the list of Countries.	Yes
ExCustomer	Returns the list of Customers.	Yes
ExDatalimitation	Returns the list of Data Limitations. Note: This view was introduced in People Planner 3.8.6.	
ExDepartment	Returns the list of Executing Departments.	Yes
ExEvent	Returns the list of Events, such as project, task, summary, amount, and milestone. See also the **ExProject**-view for the list of Project-events alone.	
ExLocalSpecification1	Returns the list of entries on the Local Specifications 1-3.	Yes
ExLocalSpecification1List	Returns the list of Local Specifications 1-3.	Yes
ExLocalSpecification2		Yes
ExLocalSpecification2List		Yes
ExLocalSpecification3		Yes
ExLocalSpecification3List		Yes
ExLocation	Returns the list of Responsible Departments. Note: The **ExLocation**-view is deprecated. Instead you should use the **ExResponsibleDepartment**-view. **ExLocation** is retained for backwards compatibility.	Yes
ExPost	Returns the list of all posts, such as the entries on any of the People Planners accounts.	

Database View	Description	Master Data
	Note: This view is identical to the **ExAllocation**-view, except that that it only show entries on the “Working Hours for resources” account.	
ExProduct	Returns the list of Products.	Yes
ExProject	Returns the list of projects, such as Jobs/Opportunities in the Maconomy-system. See also the **ExEvent**-view for the list of all events in the People Planner database.	
ExProjectGroup	Returns the list of Project Groups	
ExProjectType	Returns the list of Project Types.	Yes
ExPurpose	Returns the list of Purposes.	Yes
ExResource	Returns the list of Resources. See also the **ExResourceCategory**-view for the list of Resource Categories.	Yes
ExResourceAssignment	Returns the list of Assignments. Resources and Resource Categories are Assigned on Events.	
ExResourceCategory	Returns the list of Resource Categories. See also the **ExResource**-view for the list of Resources.	Yes
ExResponsibleDepartment	Returns the list of Responsible Departments. Note: This view replaces the deprecated **ExLocation**-view.	Yes
ExSpecification1	Returns the list of Specifications 1-3.	Yes
ExSpecification2		Yes
ExSpecification3		Yes
ExWorkWeekHours	Returns the list of Work Week Hour calendars. See also the **ExCalendar**-view for the list of holiday calendars.	Yes

Update Reporting Tables Task

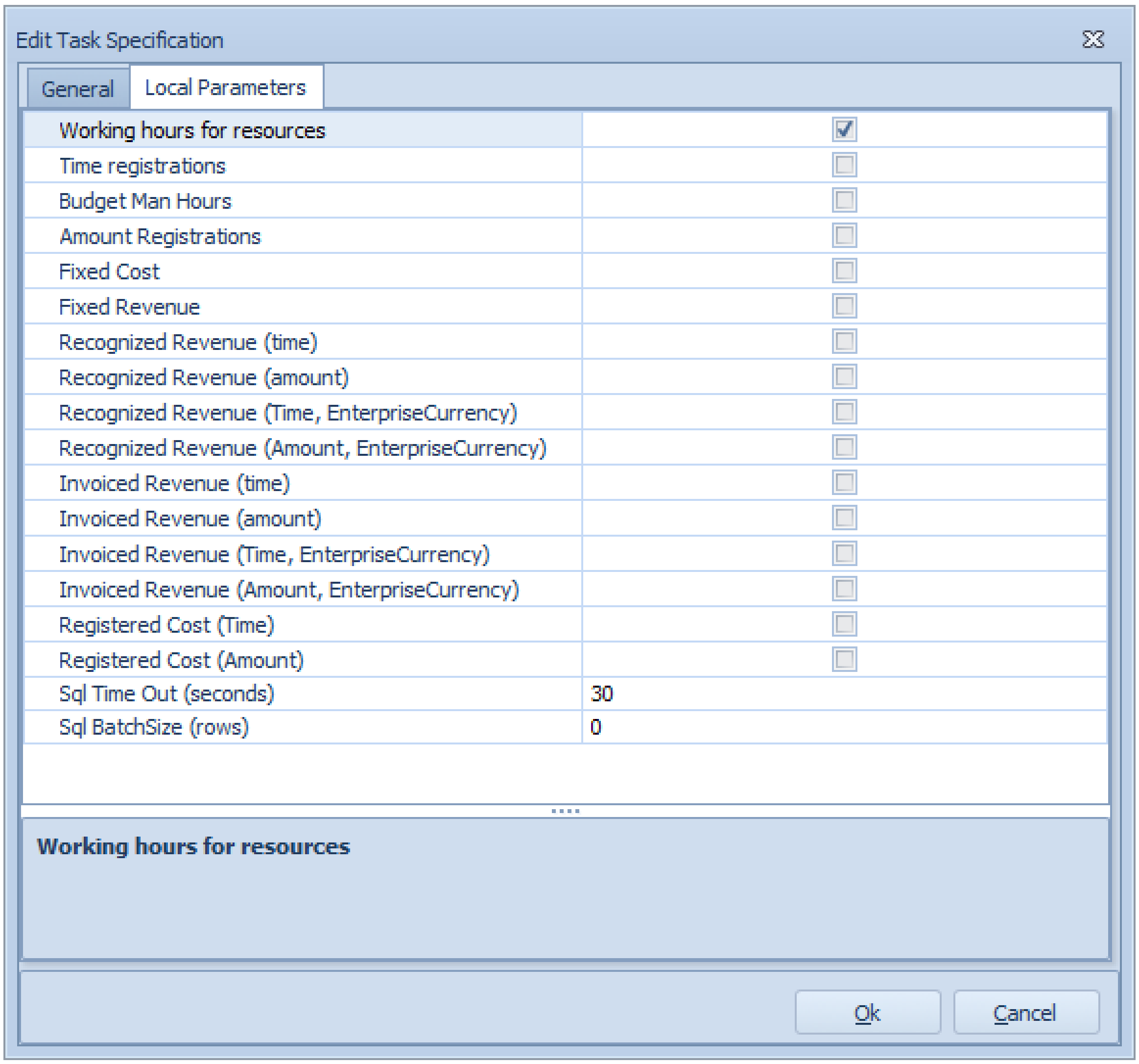
Two of the listed views, **ExAllocation** and **ExPost**, depend on the **DayIntervalEntry** table.

Update the **DayIntervalEntry** table by setting up a Task Specification of the type Update Reporting Tables. Use a Scheduled Task to schedule this to run on a regular basis. The task and scheduled task must be configured manually.

See the *People Planner Integrations Guide* for a general description on how to set up Task Specifications and Scheduled Tasks.

The **Update Reporting Table** task consolidates all posts for the various People Planner accounts into one central table. Additionally, the posts are "normalized" in the sense that they are all converted to the Day-level. For example, a booking originally created on Week-level is converted into five equivalent Posts, provided that the resource has the weekend off, on the Day-level.

When you setup the Update Reporting Tables task, you can configure which of the People Planner accounts into which you want to include it.



The two views, **ExAllocation** and **ExPost**, returns data from the **DayIntervalEntry**-table:

ExAllocation returns the posts from the "Working hours from resource" account (aka Bookings or Allocations). If this checkmark is not selected in the task, the view will return an empty list.

ExPost returns all the posts from the **DayIntervalEntry**-table. If any of the checkmarks are not selected in the **Update Reporting Table** task, these posts will not be included in the **ExPost**-

view. This does not mean that you should necessarily select all the checkmarks; if an account is not of interest to you there is no need to allocate processer-power to include it with the posts in the **DayIntervalEntry**-table.

Columns

Some of the columns are repeated in many of the views, and they are therefore discussed here.

IDs and GUIDs

Every item in the view has a unique ID. In People Planner, all the ID's are GUIDs.

Some of the views refer to items from other views, and in those cases, there is usually an associated ID that points to the item in that view – similarly to a foreign key. An example of this is the **ExResourceAssignment**-view that have both an EventID- and a ResourceID-column that refers to the ID's of the Event and the Resource or Resource Category of the assignment.

Origin

In the People Planner database, the **Origin** identifies where a piece of data originated from. The **Origin** is a GUID, and it also has a name.

Some of the **Origins** are system-defined and will never change. Others are created, e.g. when you define a new Import Mapping an Origin is created indicating that the data was imported through that Import Mapping.

The system-defined Origins are:

Origin GUID	Name	Description
50171a28-d0d7-49e5-8126-eec7b6af98b4	PeoplePlanner	This data was created directly in People Planner.
9cefe185-f0fc-4658-99c4-41809b80df60	Maconomy	This data was imported from Maconomy.
a944c529-ef77-4475-bd18-316a04c1e7a0	MicrosoftProject	This data was imported from a MS Project file.
c2157459-46d7-4380-9d3c-6726000f7d90	Exchange	This data was imported from Outlook, via an Exchange server.

In many cases, the database-views will list one or two columns, Origin and OriginID. In those cases, the Origin-column is the Name, and the OriginID-column is the GUID.

Similarly to ID's, some of the views will also list the Origin of items listed in other views. An example of this is the **ExResourceAssignment**-view that have both an EventOrigin- and a ResourceOrigin-column that refers to the Origin of the Event and the Resource or Resource Category of the assignment.

ExternalIDs

When data are imported into People Planner from an external source, they have an ExternalID that identifies the data in the source – similarly to a foreign key, but in a different database.

For data that was not imported from an external source, the ExternalID will be NULL.

Similarly to the ID's and Origins, some of the views will also list the ExternalID of items listed in other views. An example of this is the **ExResourceAssignment**-view that have both an EventExternalID- and a ResourceExternalID-column that refers to the ExternalID of the Event and the Resource or Resource Category of the assignment.

ModificationTimestamp and ModifiedBy

When an item is updated in the People Planner database, the ModificationTimestamp-column show the time for the change.

The ModifiedBy-column shows by whom it was changed; this may be a Windows user or it may be a Windows system account in the case where the data was updated by a scheduled service.

The ModificationTimestamp might be useful for solution that wants to keep trach of whether data has been changed since the previous call to the view. The ModifiedBy is most likely never useful for any context.

Views

This section lists all available External Views and some additional details where applicable. See section Basic Concepts for an overview of the views.

ExAllocation

Returns the list of bookings – aka Allocations, ManHoursEntry, or "Working hours for resources" – in the People Planner database.

Note: This view draws data from the DayIntervalEntry-table, and it is only as up-to-date as the last time the **Update Reporting Tables** task was run.

The view selects the entries from the DayIntervalEntry-table which correspond to the Account = "Working Hours for resources" (corresponding to the AccountOrigin = "BA98083B-A146-4dbf-ADF6-132FDC73E777".)

Note: See also the **ExPost**-view, which is identical to the **ExAllocation**-view, except that it include the posts for all accounts and not only for the Account = "Working Hours for resources".

All bookings are on day-level. Bookings that was originally created on Week- or Month-level, has been divided out on Day-level by the **Update Reporting Tables** task.

All bookings are made on the combination of a Resource and an Event.

ExBrand

Returns the list of Brands in the People Planner database.

ExBusinessArea

Returns the list of Business Areas in the People Planner database.

ExCalendar

Returns the list of holiday- and resource-calendars in the People Planner database. For the Work Week Hour calendar, please see the **ExWorkWeekHours**-view.

For retrieving the entries of any of the calendars, see the **ExCalendarEntry**-view.

ExCalendarEntry

Returns the list of entries in the calendars in the People Planner database. See the **ExCalendar**-view for retrieving the list of calendars.

ExCompany

Returns the list of Companies in the People Planner database.

ExCountry

Returns the list of Countries in the People Planner database.

ExCustomer

Returns the list of Customers in the People Planner database.

Note: A Customer need not be a person – it could instead be a company.

ExDatalimitation

Returns the list of Data Limitations in the People Planner database.

Note: This database-view was introduced in People Planner 3.8.6.

ExDepartment

Returns the list of Executing Departments in the People Planner database.

ExEvent

Returns the list of Events in the People Planner database. Events includes absence, amount, milestone, project, summary, and task.

See also the **ExProject**-view for the list of project-events alone.

ExLocalSpecification#List

Returns the Local Specification 1-3 lists in the People Planner database.

ExLocalSpecification#

Returns the entries in the Local Specification 1-3 lists in the People Planner database.

ExLocation

Returns the list of Responsible Departments in the People Planner database.

Note: The **ExLocation**-view has been deprecated, and it is only retained for backwards compatibility. Please use the **ExResponsibleDepartment**-view instead.

ExPost

Returns the list of posts on any of the entries on one of the People Planner accounts.

Note: This view draws data from the DayIntervalEntry-table, and it is only as up-to-date as the last time the **Update Reporting Tables** task was run.

Note: See also the **ExAllocation**-view, which is identical to the **ExPost**-view except that it only include the posts for the Account = "Working Hours for resources".

ExProduct

Returns the list of Products in the People Planner database.

ExProject

Returns the list of Projects in the People Planner database.

See also the **ExEvent**-view for the list of all the events: absence, amount, milestone, project, summary, and task.

ExProjectGroup

Returns the list of Project Groups in the People Planner database.

ExProjectType

Returns the list of Project Types in the People Planner database.

ExPurpose

Returns the list of Purposes in the People Planner database.

ExResource

Returns the list of Resources in the People Planner database.

See also the **ExResourceCategory**-view for the list of Resource Categories.

ExResourceAssignment

Returns the list of Assignments in the People Planner database.

An Assignment is always associated with both an Event and a Resource or Resource Category; the Resource (Category) is Assigned on the Event.

ExResourceCategory

Returns the list of Resource Categories in the People Planner database.

See also the **ExResource**-view for the list of Resources.

ExResponsibleDepartment

Returns the list of Responsible Departments in the People Planner database.

Note: The view replaces the **ExLocation**-view which has been deprecated.

ExSpecification#

Returns the list of Specifications 1-3 in the People Planner database.

ExWorkWeekHours

Returns the list of Work Week Hours calendars in the People Planner database.

Mappings

Master Data Mapping

This section describes how individual types of master data are mapped between Maconomy and People Planner. For a more general understanding of how master data is imported from Maconomy into People Planner, see Import Master Data from Maconomy instead.

Maconomy and People Planner are two different systems, each of which has its own database. Consequently, the two often use different names for the same concepts. Also, in some cases the concepts themselves vary slightly between the two systems. Normally, the master data import maps the concepts from Maconomy to People Planner, and you do not need to know about the details. However, if you want to customize the integration in some way, you need to know how the integration maps the Maconomy data to its People Planner equivalents.

This table describes where to find the master data in the Maconomy system and then where to find the mapped data in the People Planner system.

Master Data	Where to find in Workspace Client	Where to find in People Planner	Comment
Activities	Setup > Project Cost Setup > Dimensions tab > Activities sub-tab	Views > Dimensions > Activities	
Brands		Views > Dimensions > Brands	
BudgetTypes	Setup > System Setup > Parameter and Numbers tab > Popup Fields sub-tab (search for "Project Budget Types" popup fields)	Views > Tasks > Import Project > Budget Type drop-down box	
BusinessAreas	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Business Area sub-tab	Views > Dimensions > Business Areas	
Calendar	Human Resources > Employees > Employees tab > Select employee > Employee Information sub-tab > check the following fields: 1. Week Calendar No. field is the Common Calendar in People Planner 2. Working Time fields (Monday - Sunday) is the Work Week Hours in People Planner	Views > Resources > Check the following fields: 1. Common Calendar 2. Work Week Hours	
Companies	General Ledger > GL Setup > Companies tab	Views > Dimensions > Companies	

Master Data	Where to find in Workspace Client	Where to find in People Planner	Comment
ContactCompanies	CRM > Contact Companies	Views > Dimensions > Customers	
ContactCompanyBrands		Views > Dimensions > Brands	
ContactCompanyProducts		Views > Dimensions > Products	
Customers	Account Receivable > AR Setup > Customers tab Note: When creating an entry in this window, an entry is also created in CRM > Contact Companies (ContactCompanies in PP)	Views > Dimensions > Customers	
Departments	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Executing Departments sub-tab	Views > Dimensions > Executing Departments	
JobGroups	Setup > Project Cost Setup > Groups tab	Views > Projects > Parameters > Groups	
LocationsResources		Views > Resources > Resources (Resources with Kind = Location)	
Locations	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Responsible Departments sub-tab	Views > Dimensions : Responsible Department	
Products		Views > Dimensions > Products	
ProjectTypes	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Project Types sub-tab	Views > Dimensions > Project Types	
Purposes	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Purpose sub-tab	Views > Dimensions > Purposes	
ResourceCategories	Human Resources > Employees > Setup tab > Employee Categories sub-tab	Views > Resources > Resource Categories	
Resources	Human Resources > Employees > Employees tab > Employees sub-tab	Views > Resources > Resources	
Roles	Setup > Users > Setup tab > Window Groups sub-tab	Views > Security > Roles and Data Limitations > Edit Role tab	

Master Data	Where to find in Workspace Client	Where to find in People Planner	Comment
SkillAssociations	Human Resources > Employees > Employees tab > Skills sub-tab	Views > Resources > Resources (expand the Skill sub-grid)	
SkillLevels	Human Resources > Employees > Setup tab > Level Lists sub-tab (add an entry in the Levels pane)	Views > Resources > Skill Level Lists (expand the sub-grid)	
SkillLists	Human Resources > Employees > Setup tab > Level Lists sub-tab	Views > Resources > Skill Level Lists	
Skills	Human Resources > Employees > Setup tab > Skills sub-tab	Views > Resources > Skills	
UserRoles	Setup > Users > Users tab > Select user > Groups pane	Views > Security > Roles and Data Limitations > User Management tab > Select User > Roles pane	
Users	Setup > Users > Users tab	Views > Security > Users	
LocalSpecification1Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 1 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 1	
LocalSpecification1s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 1 sub-tab (add an entry in the Local Spec. 1 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 1 (expand the sub-grid)	
LocalSpecification2Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 2 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 2	
LocalSpecification2s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 2 sub-tab (add an entry in the Local Spec. 2 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 2 (expand the sub-grid)	

Master Data	Where to find in Workspace Client	Where to find in People Planner	Comment
LocalSpecification3Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 3 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 3	
LocalSpecification3s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 3 sub-tab (add an entry in the Local Spec. 3 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 3 (expand the sub-grid)	
LocalSpecification4Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 4 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 4	Import using REST
LocalSpecification4s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 4 sub-tab (add an entry in the Local Spec. 4 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 4 (expand the sub-grid)	Import using REST
LocalSpecification5Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 5 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 5	Import using REST
LocalSpecification5s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 5 sub-tab (add an entry in the Local Spec. 5 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 5 (expand the sub-grid)	Import using REST
LocalSpecification6Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 6 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 6	Import using REST
LocalSpecification6s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 6 sub-tab (add an entry in the Local Spec. 6 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 6 (expand the sub-grid)	Import using REST

Master Data	Where to find in Workspace Client	Where to find in People Planner	Comment
LocalSpecification7Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 7 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 7	Import using REST
LocalSpecification7s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 7 sub-tab (add an entry in the Local Spec. 7 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 7 (expand the sub-grid)	Import using REST
LocalSpecification8Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 8 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 8	Import using REST
LocalSpecification8s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 8 sub-tab (add an entry in the Local Spec. 8 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 8 (expand the sub-grid)	Import using REST
LocalSpecification9Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 9 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 9	Import using REST
LocalSpecification9s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 9 sub-tab (add an entry in the Local Spec. 9 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 9 (expand the sub-grid)	Import using REST
LocalSpecification10Lists	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 10 sub-tab	Views > Dimensions > LocalSpecifications > Local Specification 10	Import using REST
LocalSpecification10s	General Ledger > GL Setup > Dimensions tab > Local sub-tab > Local Specification 10 sub-tab (add an entry in the Local Spec. 10 Entries pane)	Views > Dimensions > LocalSpecifications > Local Specification 10 (expand the sub-grid)	Import using REST
Specification2s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 2 sub-tab	Views > Dimensions > Specifications > Specifications 2	

Master Data	Where to find in Workspace Client	Where to find in People Planner	Comment
Specification3s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 3 sub-tab	Views > Dimensions > Specifications > Specifications 3	
Specification4s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 4 sub-tab	Views > Dimensions > Specifications > Specifications 4	Import using REST
Specification5s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 5 sub-tab	Views > Dimensions > Specifications > Specifications 5	Import using REST
Specification6s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 6 sub-tab	Views > Dimensions > Specifications > Specifications 6	Import using REST
Specification7s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 7 sub-tab	Views > Dimensions > Specifications > Specifications 7	Import using REST
Specification8s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 8 sub-tab	Views > Dimensions > Specifications > Specifications 8	Import using REST
Specification9s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 9 sub-tab	Views > Dimensions > Specifications > Specifications 9	Import using REST
Specification10s	General Ledger > GL Setup > Dimensions tab > Global sub-tab > Specification 10 sub-tab	Views > Dimensions > Specifications > Specifications 10	Import using REST

Project Import Mapping

This section describes how the individual fields of a job/project and its budget lines are mapped between Maconomy and People Planner. For a more general understanding of how projects are imported from Maconomy into People Planner, see Import Projects from Maconomy.

Maconomy and People Planner are two different systems, each of which has its own database. Consequently, the two often use different names for the same concepts. Also, in some cases the concepts themselves vary slightly between the two systems. For example, this is the case for “jobs” and “budget lines” in Maconomy; they are imported into People Planner as “projects” and “tasks” or “summaries.” In the People Planner database, both the project itself and the individual tasks or summaries are stored in the same table, “Event,” and because of this, they share the same fields in People Planner. In Maconomy, a job and its budget lines do have some fields in common, but not as many as in People Planner.

Normally, the project import maps the job and budget lines from Maconomy to People Planner, and you do not need to know about the details. However, if you want to customize the project import in some way, you need to know how the integration maps the Maconomy data to the People Planner equivalents.

If the People Planner system uses the MaconomyWS web service to import projects, one way to customize the project import is by editing the I-files. A typical customization would be to map a field that is not normally imported into People Planner to a field that is—essentially overshadowing that field. If, instead, People Planner uses the Maconomy RESTful web service, I-files are not supported.

Job

This table describes the fields of a job in Maconomy and how they are mapped to fields in the Event table in People Planner. Projects are stored as events with Kind = 0.

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Account Manager	Sales Person	Projects > Projects > Open the project > Home tab > Information sub-tab	SalesPersonNumber	salespersonnumber	
Blocked	Budgeting checkbox (under "Blocked for" island)	Projects > Projects > Open the project > Home tab > Information sub-tab	BlockedForBudgeting	blockedforbudgeting	
Boolean 1 from Maconomy	Boolean 1	Single Dialogs > Project Cost > Creation > Projects	Boolean1	boolean1	
Boolean 2 from Maconomy	Boolean 2	Single Dialogs > Project Cost > Creation > Projects	Boolean2	boolean2	
Boolean 3 from Maconomy	Boolean 3	Single Dialogs > Project Cost > Creation > Projects	Boolean3	boolean3	
Boolean 4 from Maconomy	Boolean 4	Single Dialogs > Project Cost > Creation > Projects	Boolean4	boolean4	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Boolean 5 from Maconomy	Boolean 5	Single Dialogs > Project Cost > Creation > Projects	Boolean5	boolean5	
Brand	N/A	N/A	BrandNumber	N/A	
Budget Billing Price	Budgeted Billing Price, Currency (add this column in filter if it does not exist)	Projects > Projects	BudgetBillingPriceCurrency	budgetbillingpricecurrency	
BudgetLine Grouping Type	Popup 6	Single Dialogs > Project Cost > Creation > Projects	BudgetLineGroupingType	Popup6	
Business Area	Business Area	Projects > Projects > Open the project > Home tab > Information sub-tab	Specification1Name	specification1name	
Closed	Closed	Single Dialogs > Project Cost > Creation > Projects	Closed	closed	
Company	Company	Projects > Projects > Open the project > Home tab > Information sub-tab	CompanyNumber	companynumber	
Currency	Project Currency	Projects > Projects > Open the project > Home tab > Prices sub-tab	Currency	currency	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Customer	Customer	Projects > Projects > Open the project > Home tab > Information sub-tab	CustomerNumber	customernumber	
Customer Popup 1 from Maconomy	Customer Popup 1	Single Dialogs > Project Cost > Creation > Projects	CustomerPopup1	customerpopup1	
Customer Popup 2 from Maconomy	Customer Popup 2	Single Dialogs > Project Cost > Creation > Projects	CustomerPopup2	customerpopup2	
Customer Popup 3 from Maconomy	Customer Popup 3	Single Dialogs > Project Cost > Creation > Projects	CustomerPopup3	customerpopup3	
Customer Popup 4 from Maconomy	Customer Popup 4	Single Dialogs > Project Cost > Creation > Projects	CustomerPopup4	customerpopup4	
Customer Popup 5 from Maconomy	Customer Popup 5	Single Dialogs > Project Cost > Creation > Projects	CustomerPopup5	customerpopup5	
Date 1 from Maconomy	Date 1	Single Dialogs > Project Cost > Creation > Projects	Date1	date1	
Date 2 from Maconomy	Date 2	Single Dialogs > Project Cost > Creation > Projects	Date2	date2	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Date 3 from Maconomy	Date 3	Single Dialogs > Project Cost > Creation > Projects	Date3	date3	
Date 4 from Maconomy	Date 4	Single Dialogs > Project Cost > Creation > Projects	Date4	date4	
Date 5 from Maconomy	Date 5	Single Dialogs > Project Cost > Creation > Projects	Date5	date5	
Date of Budget	Last Estimate	Projects > Projects > Open the project > Progress Evaluation tab > Progress Evaluation sub-tab	LatestEstimatedate	N/A	
Description	Internal (third text field under Description island)	Single Dialogs > Project Cost > Creation > Projects	Description	description3	
Effective Quote Price	Effective Quote Price	Single Dialogs > Project Cost > Creation > Projects	QuotationPriceCurrency	quotationpricecurrency	
Employee 1 from Maconomy	Employee 1 (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber1	employeenumber1	
Employee 10 from Maconomy	Budget Approver (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber10	employeenumber10	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Employee 2 from Maconomy	Employee 2 (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber2	employeenumber2	
Employee 3 from Maconomy	Employee 3 (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber3	employeenumber3	
Employee 4 from Maconomy	Employee 4 (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber4	employeenumber4	
Employee 5 from Maconomy	Employee 5 (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber5	employeenumber5	
Employee 6 from Maconomy	Purchase Order Approver (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber6	employeenumber6	
Employee 7 from Maconomy	Finance (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber7	employeenumber7	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Employee 8 from Maconomy	Invoice Approver (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber8	employeenumber8	
Employee 9 from Maconomy	Account Manager (under Employees island)	Single Dialogs > Project Cost > Creation > Projects	EmployeeNumber9	employeenumber9	
Entity or Main Project Executing Department	Executing Department	Single Dialogs > Project Cost > Creation > Projects	EntityName	entityname	
ERP Probability	Probability % (under Forecast island)	Single Dialogs > Project Cost > Budgeting > Periodic Budgets	ProbabilityPercentage	probabilitypercentage	
External Actual	Completed (under Updated island)	Single Dialogs > API > Project Cost > Budgeting > Project Budgets API > Open the project > Project Budgets API tab	ExecutedNumberOf	N/A	This is the approved actuals in Maconomy up to the Estimate Date
External ETC	Estimated Time to Compl. (under	Single Dialogs > API > Project Cost > Budgeting > Project Budgets API >	EstimatedTimeToCompletion	N/A	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
	Updated island)	Open the project > Project Budgets API tab			
Finish	Start and ending	Projects > Projects > Open the project > Home tab > Information sub-tab	ExpectedEndingDate	expectedendingdate	The dates will be used if during import the "Use dates from Maconomy" is set to Always or First Time (for 1st import).
Fixed Price	Fixed Price	Projects > Projects > Open the project > Home tab > Information sub-tab	FixedPriceCurrencyVar	fixedpricecurrency	
Group	Project Group	Projects > Projects > Open the project > Home tab > Information sub-tab	JobGroup	jobgroup	
Group	Project Group	Projects > Projects > Open the project > Home tab > Information sub-tab	JobGroupNumber	N/A	
Limit, hours	Hours (under Limit island)	Single Dialogs > Project Cost > Budgeting > Periodic Budgets	LimitNumberOfHours	limittimequantity	
Local Spec 1	Local Spec. 1	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	LocalSpec1Name	localspec1name	
Local Spec 10	Local Spec. 10	Projects > Projects > Open the project > Home tab >	N/A	localspec10name	Applicable for REST import only

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
		Information sub-tab > Derived Dimensions pane			
Local Spec 2	Local Spec. 2	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	LocalSpec2Name	localspec2name	
Local Spec 3	Local Spec. 3	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	LocalSpec3Name	localspec3name	
Local Spec 4	Local Spec. 4	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	localspec4name	Applicable for REST import only
Local Spec 5	Local Spec. 5	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	localspec5name	Applicable for REST import only
Local Spec 6	Local Spec. 6	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	localspec6name	Applicable for REST import only
Local Spec 7	Local Spec. 7	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	localspec7name	Applicable for REST import only
Local Spec 8	Local Spec. 8	Projects > Projects > Open the project > Home tab >	N/A	localspec8name	Applicable for REST import only

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
		Information sub-tab > Derived Dimensions pane			
Local Spec 9	Local Spec. 9	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	localspec9name	Applicable for REST import only
Maconomy Budget Type	Detailed Time Budgeting (add this column in filter if it's not exist)	Projects > Projects	N/A	detailedtimebudgeting	
Main Project Name	Project	Projects > Projects > Open the project > Home tab > Information sub-tab	JobName	jobname	
Main Project Number	Main Project	Single Dialogs > Project Cost > Creation > Projects	MainJobNumber	mainjobnumber	
Max. Billing Price	Max. Billing Price	Single Dialogs > Project Cost > Creation > Projects	LimitBillingPriceCurrency	limitbillingpricecurrency	
Modified Timestamp	N/A	N/A	TransactionTimeStamp	transactiontimestamp	Date and time of import
Popup 1 from Maconomy	Popup 1	Single Dialogs > Project Cost > Creation > Projects	Popup1	popup1	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Popup 2 from Maconomy	Popup 2	Single Dialogs > Project Cost > Creation > Projects	Popup2	popup2	
Popup 3 from Maconomy	Popup 3	Single Dialogs > Project Cost > Creation > Projects	Popup3	popup3	
Popup 4 from Maconomy	Popup 4	Single Dialogs > Project Cost > Creation > Projects	Popup4	popup4	
Popup 5 from Maconomy	Popup 5	Single Dialogs > Project Cost > Creation > Projects	Popup5	popup5	
Product	N/A	N/A	ProductNumber	N/A	
Project Manager	Project Manager	Projects > Projects > Open the project > Home tab > Information sub-tab	ProjectManagerNumber	projectmanagernumber	
Project Number	Project	Projects > Projects > Open the project > Home tab > Information sub-tab	JobNumber	jobnumber	
Project Status	Status	Projects > Projects > Open the project > Home tab > Information sub-tab	Status	status	
Purpose	Purpose	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	PurposeName	purposename	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Reference from Maconomy	Ref.	Single Dialogs > Project Cost > Creation > Projects	Reference	reference	
Responsible Department	Responsible Department	Projects > Projects > Open the project > Home tab > Information sub-tab	LocationName	locationname	
Specification 10	Spec. 10	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	specification10name	Applicable for REST import only
Specification 2	Spec. 2	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	Specification2Name	specification2name	
Specification 3	Spec. 3	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	Specification3Name	specification3name	
Specification 4	Spec. 4	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	specification4name	Applicable for REST import only
Specification 5	Spec. 5	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	specification5name	Applicable for REST import only
Specification 6	Spec. 6	Projects > Projects > Open the project > Home tab >	N/A	specification6name	Applicable for REST import only

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
		Information sub-tab > Derived Dimensions pane			
Specification 7	Spec. 7	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	specification7name	Applicable for REST import only
Specification 8	Spec. 8	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	specification8name	Applicable for REST import only
Specification 9	Spec. 9	Projects > Projects > Open the project > Home tab > Information sub-tab > Derived Dimensions pane	N/A	specification9name	Applicable for REST import only
Start	Start and ending	Projects > Projects > Open the project > Home tab > Information sub-tab	StartingDate	startingdate	The dates are used if during import the "Use dates from Maconomy" is set to Always or First Time (for first import).
Text 1 from Maconomy	Text 1	Single Dialogs > Project Cost > Creation > Projects	Text1	text1	
Text 10 from Maconomy	Text 10	Single Dialogs > Project Cost > Creation > Projects	Text10	text10	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Text 11 from Maconomy	Text 11	Single Dialogs > Project Cost > Creation > Projects	Text11	text11	
Text 12 from Maconomy	Text 12	Single Dialogs > Project Cost > Creation > Projects	Text12	text12	
Text 13 from Maconomy	Text 13	Single Dialogs > Project Cost > Creation > Projects	Text13	text13	
Text 14 from Maconomy	Text 14	Single Dialogs > Project Cost > Creation > Projects	Text14	text14	
Text 15 from Maconomy	Text 15	Single Dialogs > Project Cost > Creation > Projects	Text15	text15	
Text 16 from Maconomy	Text 16	Single Dialogs > Project Cost > Creation > Projects	Text16	text16	
Text 17 from Maconomy	Text 17	Single Dialogs > Project Cost > Creation > Projects	Text17	text17	
Text 18 from Maconomy	Text 18	Single Dialogs > Project Cost > Creation > Projects	Text18	text18	
Text 19 from Maconomy	Text 19	Single Dialogs > Project Cost > Creation > Projects	Text19	text19	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in the WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Text 2 from Maconomy	Text 2	Single Dialogs > Project Cost > Creation > Projects	Text2	text2	
Text 20 from Maconomy	Text 20	Single Dialogs > Project Cost > Creation > Projects	Text20	text20	
Text 3 from Maconomy	Text 3	Single Dialogs > Project Cost > Creation > Projects	Text3	text3	
Text 4 from Maconomy	Text 4	Single Dialogs > Project Cost > Creation > Projects	Text4	text4	
Text 5 from Maconomy	Text 5	Single Dialogs > Project Cost > Creation > Projects	Text5	text5	
Text 6 from Maconomy	Text 6	Single Dialogs > Project Cost > Creation > Projects	Text6	text6	
Text 7 from Maconomy	Text 7	Single Dialogs > Project Cost > Creation > Projects	Text7	text7	
Text 8 from Maconomy	Text 8	Single Dialogs > Project Cost > Creation > Projects	Text8	text8	
Text 9 from Maconomy	Text 9	Single Dialogs > Project Cost > Creation > Projects	Text9	text9	
Type	Project Type	Projects > Projects > Open the project > Home tab > Information sub-tab	ProjectName	projectname	

Budget Lines

This table describes how the individual budget lines of a budget are mapped to fields in the Event table. Tasks and summaries are stored as events with Kind = 3 and Kind = 5.

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Activity Number / Activity	Act. No. / Activity Name	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	ActivityNumber	activitynumber	
Baseline Budget	Quantity	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	BaselineNumberOf	N/A	Quantity value when the Show Budget field in Maconomy is set to Baseline
Date of Budget	Estimate Date	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	LatestEstimateDate	latestestimatedate	
Descriptio n	Remark2	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark2	remark2	
Employee from Maconom y	Employee No. / Employee Name	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	EmployeeNumber	employeenumber	
External Actual	Actual	Projects > Projects > Open the project > Progress Evaluation tab > Progress Evaluation sub-tab > Tasks pane	ExecutedNumberOf	N/A	This is the approved actuals in Maconomy up to the Estimate Date

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
External ETC	ETC	Projects > Projects > Open the project > Progress Evaluation tab > Progress Evaluation sub-tab > Tasks pane	EstimatedTimeToCompletion	latestestimatedtimetocompletion	ETC field after the Planning Budget is approved.
External ID	First Instance Key	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	FirstInstanceKey	firstinstancekey	
Finish	Planned Ending Date	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	ClosingDate	closingdate	The dates are used if during import the "Use dates from Maconomy" is set to Always or First Time (for first import).
Kind	Line Type	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	LineType	linetype	
Local Spec 1	Local Spec. 1	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	LocalSpec1Name	localspec1name	
Local Spec 10	Local Spec. 10	Projects > Projects > Open the project >	N/A	localspec10name	Applicable for REST import only

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
		Budgeting tab > Budget sub-tab > Time pane			
Local Spec 2	Local Spec. 2	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	LocalSpec2Name	localspec2name	
Local Spec 3	Local Spec. 3	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	LocalSpec3Name	localspec3name	
Local Spec 4	Local Spec. 4	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	N/A	localspec4name	Applicable for REST import only
Local Spec 5	Local Spec. 5	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	N/A	localspec5name	Applicable for REST import only
Local Spec 6	Local Spec. 6	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	N/A	localspec6name	Applicable for REST import only
Local Spec 7	Local Spec. 7	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	N/A	localspec7name	Applicable for REST import only

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
Local Spec 8	Local Spec. 8	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	N/A	localspec8name	Applicable for REST import only
Local Spec 9	Local Spec. 9	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	N/A	localspec9name	Applicable for REST import only
Maconomy Instance Key	Instance Key	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	InstanceKey	instancekey	
N/A	N/A	N/A	LocationResourceName	locationname	
NA	Project Budget Line Reference	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	JobBudgetlineReference	jobbudgetlinereference	Not used anywhere in PP
NA	Line No.	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	LineNumber	linenumber	
NA	Parent Project Budget Line	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	ParentInstanceKey	parentjobbudgetlineinstanc ekey	Not used in Event but is saved in MaconomyJobBubdge tLine table. It is also used to identify which is the

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
					parent event from imported budget lines
NA	Remark	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark	remark	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark10	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark10	remark10	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark3	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark3	remark3	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark4	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark4	remark4	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark5	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark5	remark5	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark6	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark6	remark6	Not used in Event but is saved in MaconomyJobBubdgetLine table

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
NA	Remark7	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark7	remark7	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark8	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark8	remark8	Not used in Event but is saved in MaconomyJobBubdgetLine table
NA	Remark9	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Remark9	remark9	Not used in Event but is saved in MaconomyJobBubdgetLine table
Name	Description	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Text	text	
Project Status	Status	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	Status	status	Not used in Event but is saved in MaconomyJobBubdgetLine table. The value of main project is the value of the budgetline.
Resource Category	Employee Category No. / Employee	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	EmployeeCategoryNumber	employeecategorynumber	

People Planner Field Name in PG Views	Maconomy Field Name in Workspace Client (WSC)	Where to find in WSC	Maconomy WSC Internal Field Name	REST Internal Field Name	Notes
	Category Name				
Start	Planned Starting Date	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	TheDate	thedate	The dates are used if during import the "Use dates from Maconomy" is set to Always or First Time (for first import).
Task List ID	Task	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	TaskName	taskname	
Working Budget	Quantity	Projects > Projects > Open the project > Budgeting tab > Budget sub-tab > Time pane	NumberOf	numberof	

About Deltek

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