Deltek People Planner 4.2

Web Components Guide

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Contents

Introduction

Although People Planner and Maconomy are separate applications, you can access central parts of the People Planner functionality directly from the Maconomy Workspace Client (WSC).

Depending on how they are configured, this can be divided into three main areas:

- MyPlan
- People Planner WSC Components
- People Planner buttons

This document describes this functionality. For information about how to configure your system, you should read the *Deltek People Planner Integrations Guide* and the *Deltek People Planner Administration Guide*.

Note: This document assumes that you are using Maconomy 2.4 or newer and People Planner 3.8 or newer.

People Planner and Maconomy Terms

People Planner and Maconomy are two separate applications; they differ in the terms that they use for similar concepts.

Maconomy	People Planner
Budget Line of type Sum/Text	Summary
Budget Line of type Time	Task
Budget Line of type Amount and Outlay	Amount
Employee	Resource
Employee Category	Resource Category
Job, Project, or Engagement, depending on the solution	Project
Assigning an employee or an employee category on a budget line. Maconomy does not have a specific term for this action.	Assignment

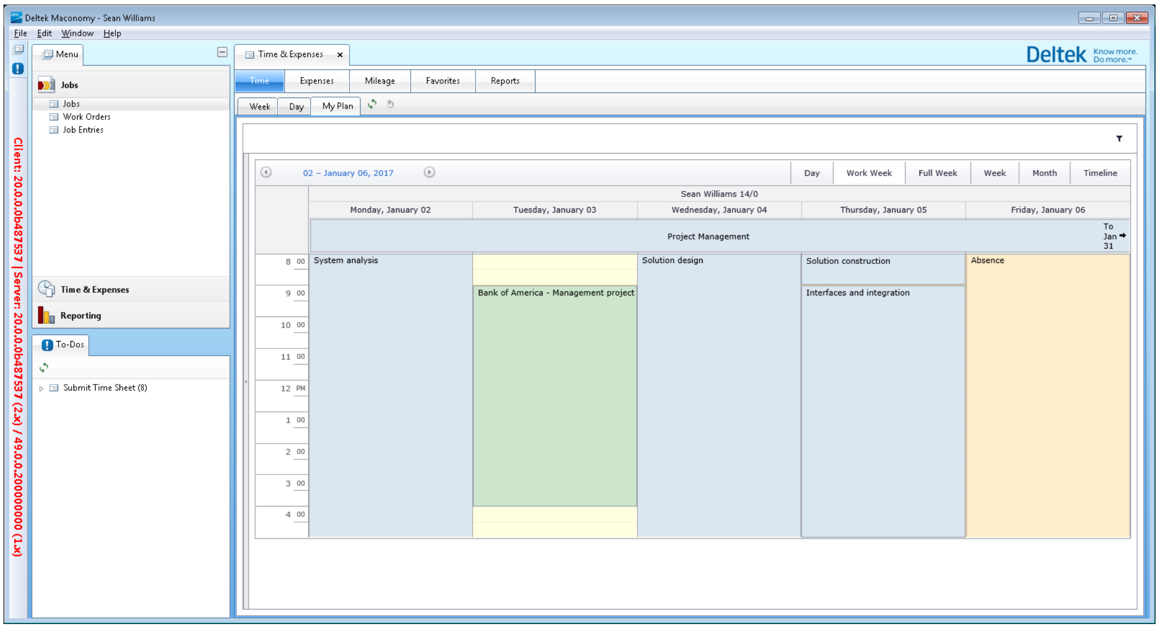
The embedded People Planner elements generally use the People Planner terms. This document uses either term, depending on the context.

MyPlan

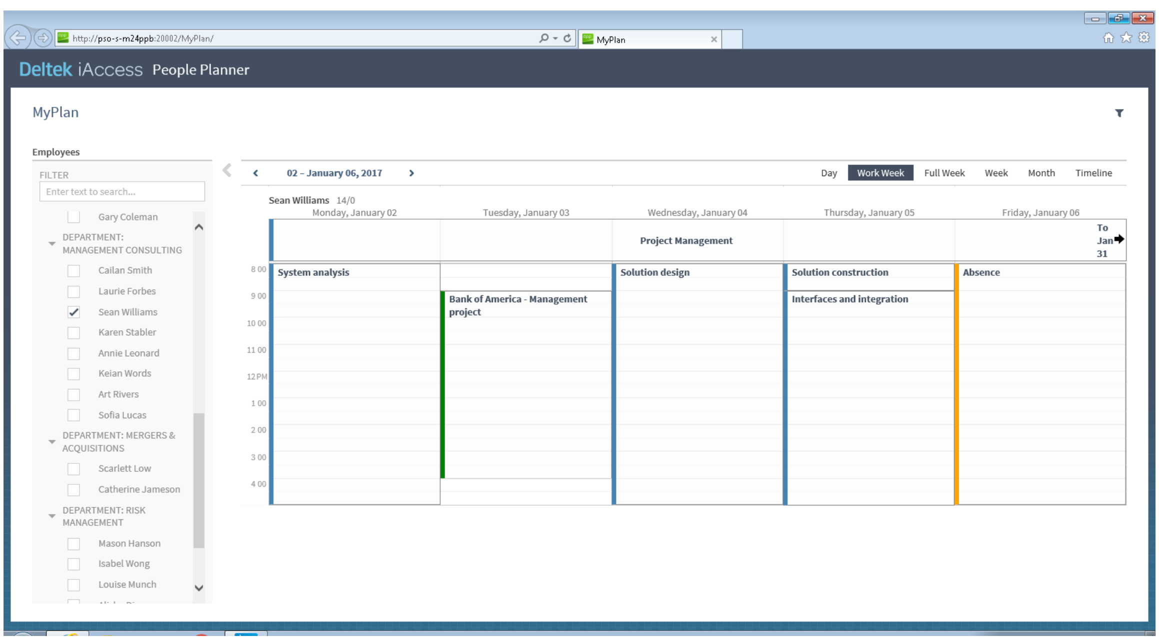
MyPlan shows your bookings.

To find MyPlan:

1. Navigate to **Menu » Time & Expenses » Time & Expenses**.
2. Click the **Time** tab and then the **My Plan** sub-tab.



You can also access MyPlan directly from a browser. If you use it this way, MyPlan uses the iAccess theme by default, but the functionality is otherwise unchanged.



Bookings

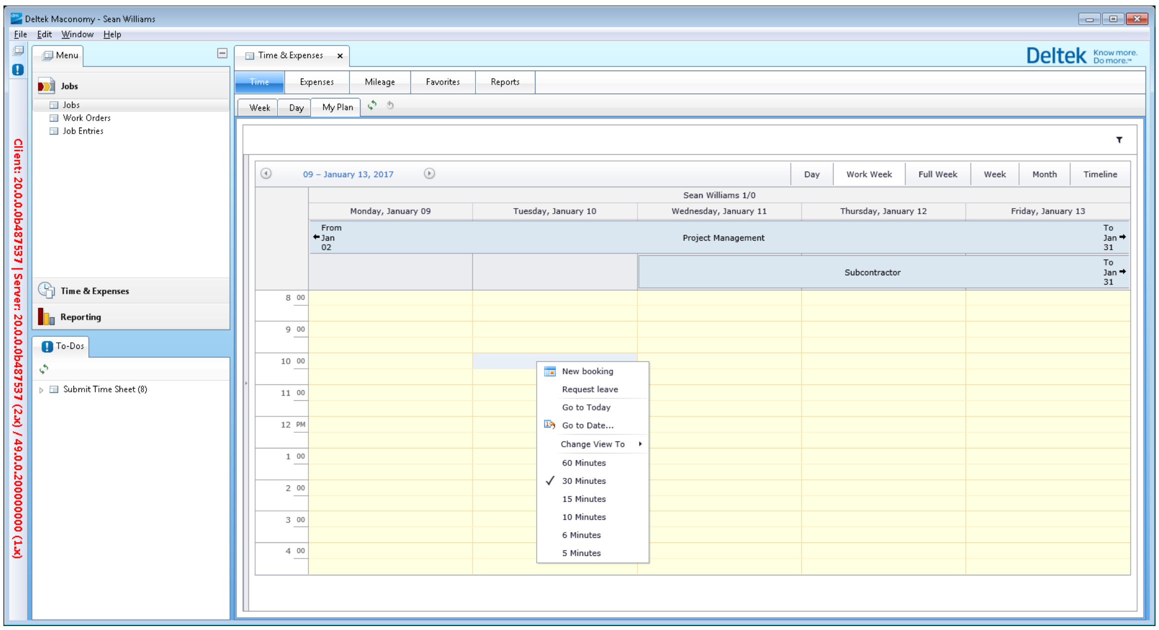
Normally you are booked on a task by the Project Manager or by your Resource Manager.

> **Note:** Depending on how the system is configured and on which privileges you have, you might not see this menu item.

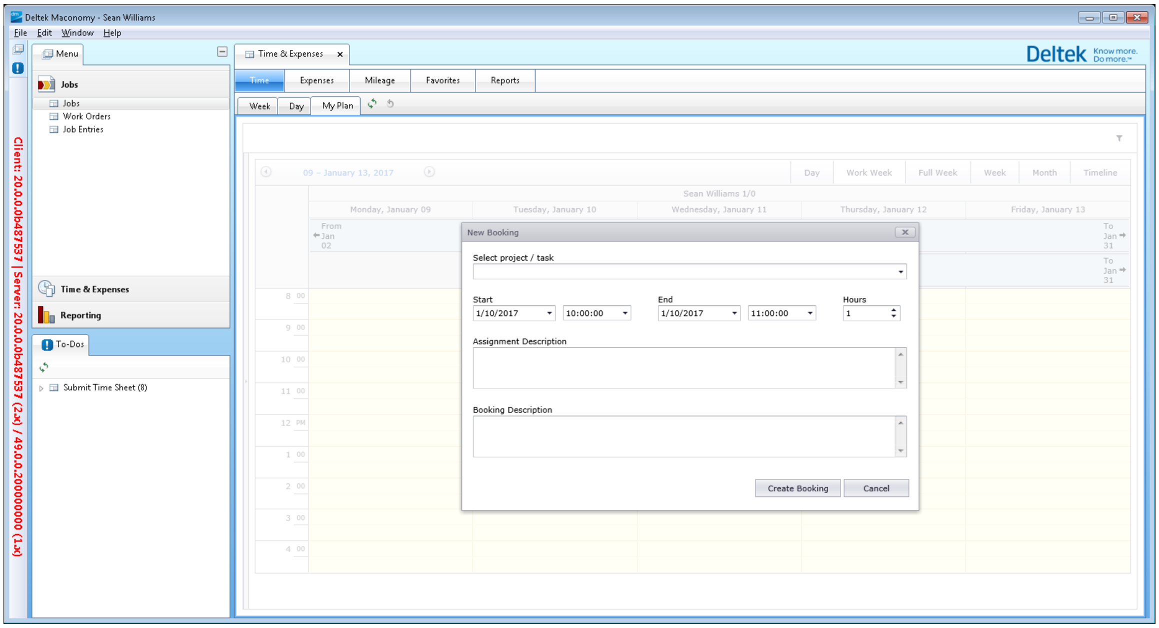
Using MyPlan, you can also create a booking yourself.

To create a booking yourself using MyPlan:

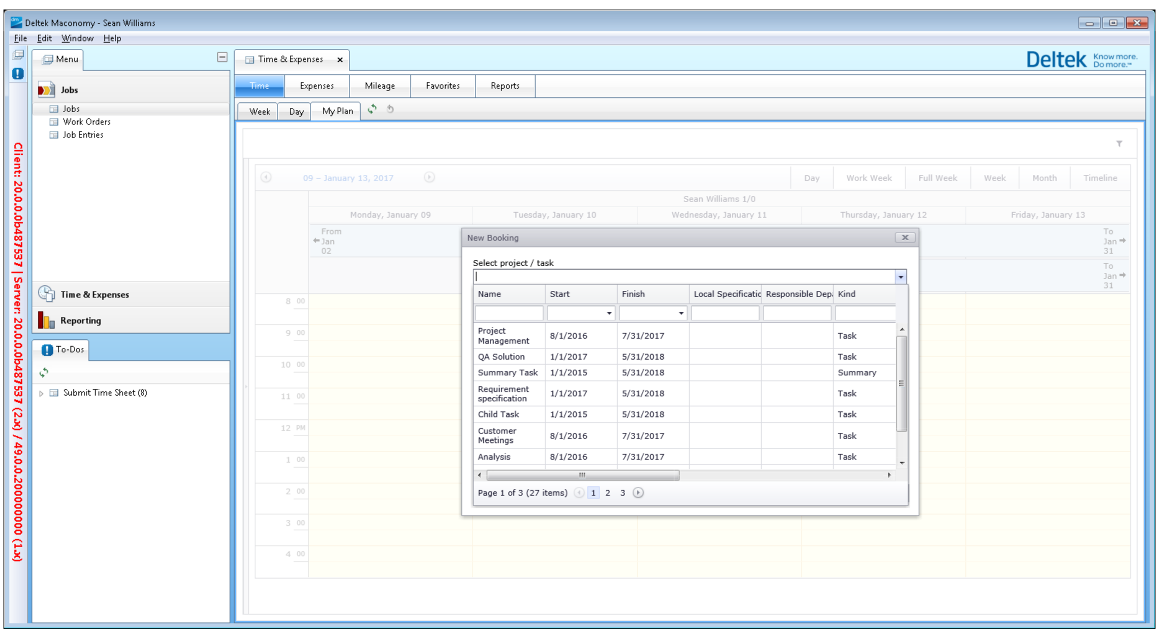
1. Navigate to where MyPlan is embedded.
2. Right-click on the time and date.



3. On the shortcut menu, select **New Booking**.



4. On the New Booking dialog box, select a project or task from the drop-down list for the **Select project / task** field.



5. Select the number of hours for the **Hours** field.
6. Click the **Create Booking** button to save the booking.

In addition, you can give the booking an Assignment Description. This is a note that is shared among all of your bookings on the same task. A Booking Description is a note on the specific booking.

Column Chooser

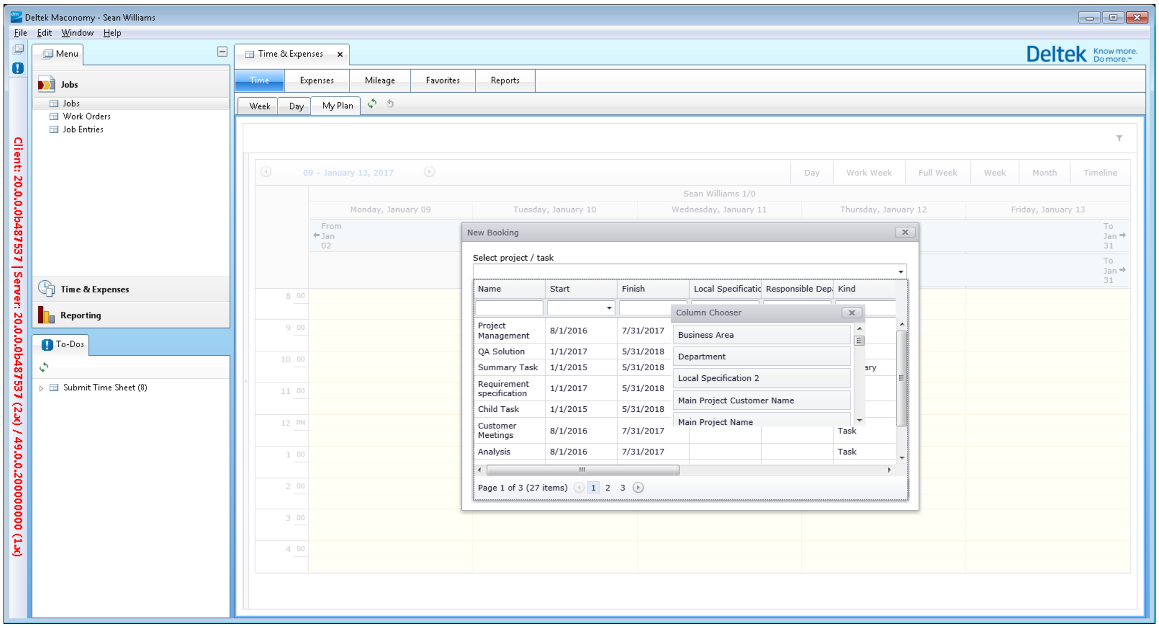
The New Booking dialog displays a set preselected of columns, Name, Start and Finish of the task, which may be relevant to finding the correct task to create the booking on.

The columns are not all visible, but you can scroll to see them. If you are searching for information in a column that is not there, you can add the column to the dialog.

Use these steps to customize your Column Chooser.

To add a column:

1. Right-click on the header of the list. This opens the Column Chooser.
2. On the Column Chooser, find the column that you want to add.
3. Use the mouse to drag the column onto the header. You can add one or more columns using this method.



4. Click the **X** button in the upper-right corner of the Column Chooser to close it.

Absence

Absences are vacation time, holidays, illnesses, and so on.

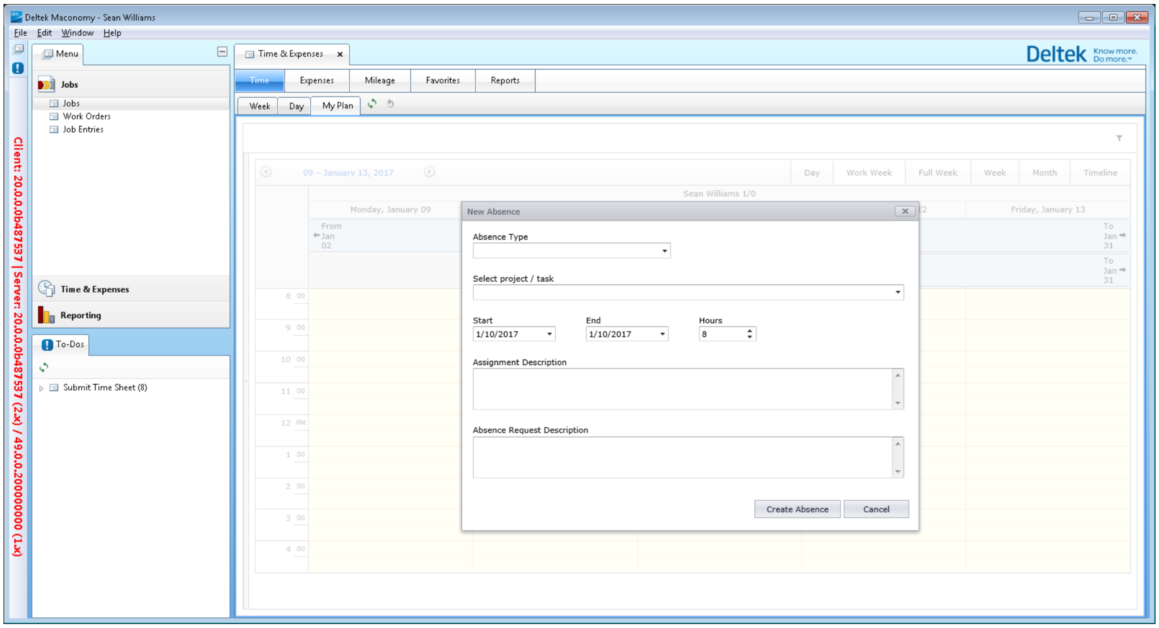
> **Note:** Depending on how the system is configured and on which privileges you have, you might not see this menu item.

Use these steps to create an absence request.

To request an absence:

1. Navigate to where MyPlan is embedded.
2. Right-click on the date.

3. Select **Request Leave** from the shortcut menu. This opens the New Absence dialog.



4. On the New Absence dialog box, select **Absence Task** from the drop-down list for the **Absence Type** field.
5. Select the number of hours for the **Hours** field.
6. Click the **Create Absence** button to save the absence.

Note: If there are multiple absences to choose from, you can filter them by first choosing an absence type from the drop-down list for the Absence Type field—for example, illness, vacation, time in lieu, and so on.

Warning: If your company has decided to use Maconomy's own Absence Management functionality, you should not do it from MyPlan. In this case, you should simply set up a People Planner Scheduled Task to import the absences from Maconomy to People Planner.

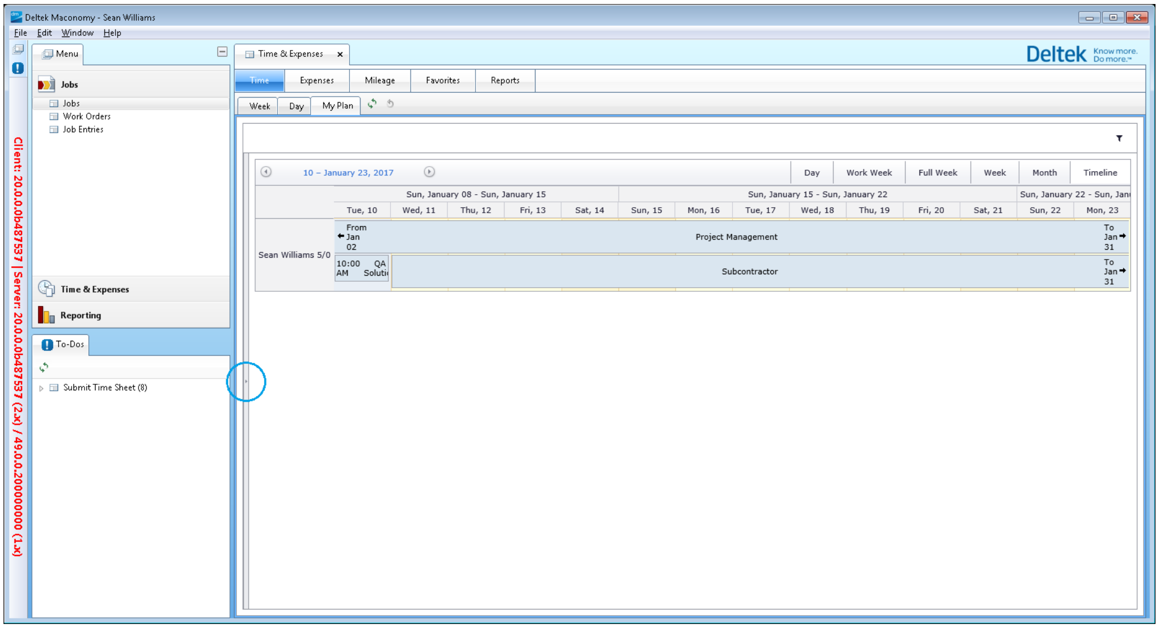
List of Employees

By default, MyPlan only shows you your own bookings. If you have the required the privilege, because you are a Project Manager, you can ask MyPlan to show the bookings of other resources.

Use these steps to view other employees' bookings.

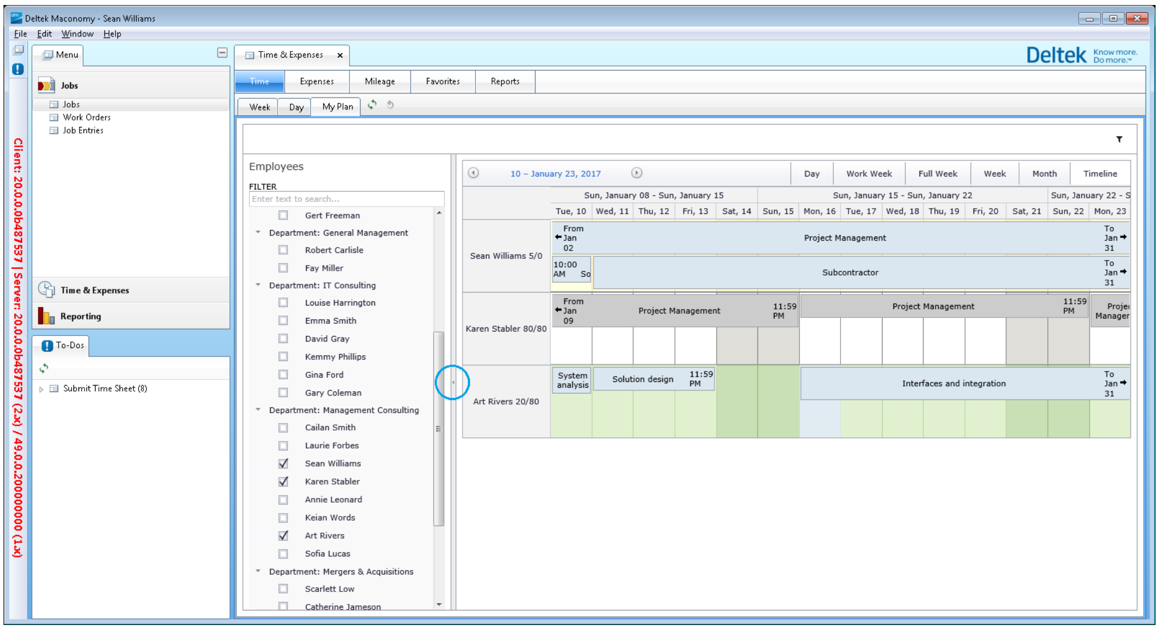
To show the bookings of other resources:

1. Click the small triangle button at the left side of the MyPlan window.



This expands the list of employees.

2. Select the check boxes of the employees whom you want to add.



You can select up to three employees to be shown.

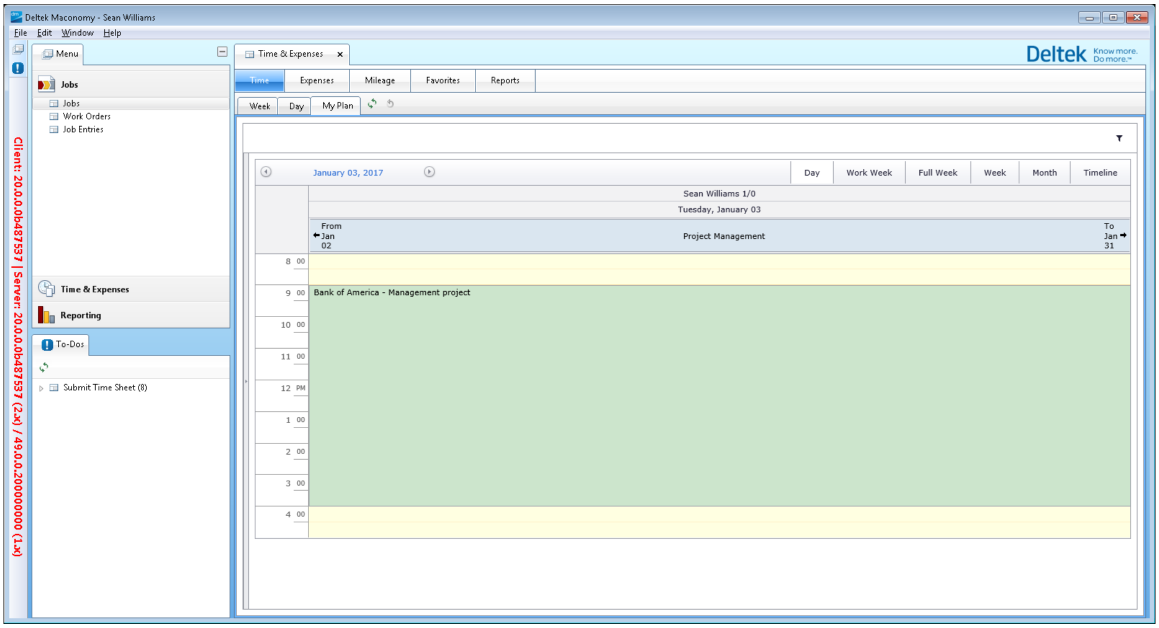
You can close the list of employees by clicking the triangle button again.

The required privilege is controlled by People Planner roles. You can find this in **Data Manipulation » ActionsFolder » Display Resource Selector** in MyPlan.

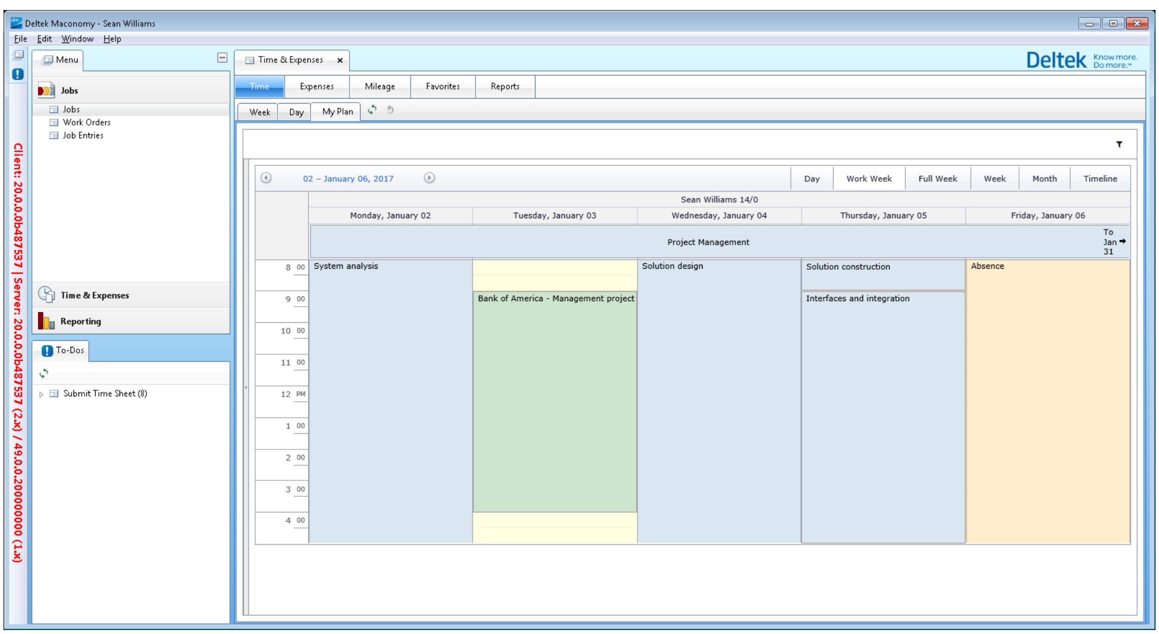
Views

You can view the bookings in six time scales: Day, Work Week, Full Week, Week, Month, and Timeline.

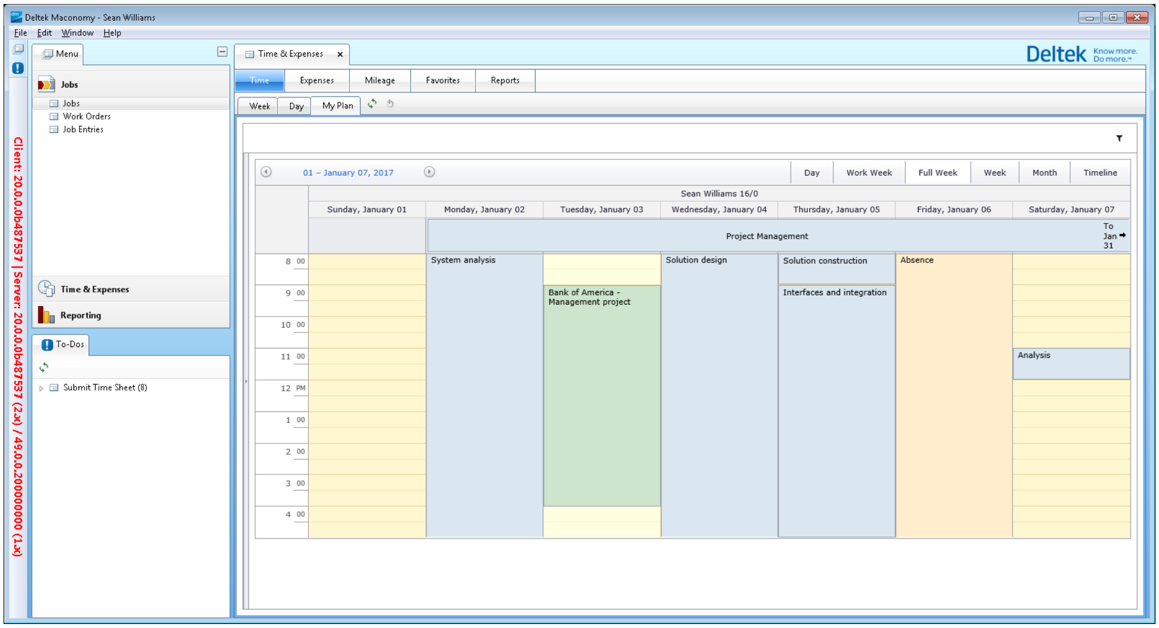
Day View



Work Week View



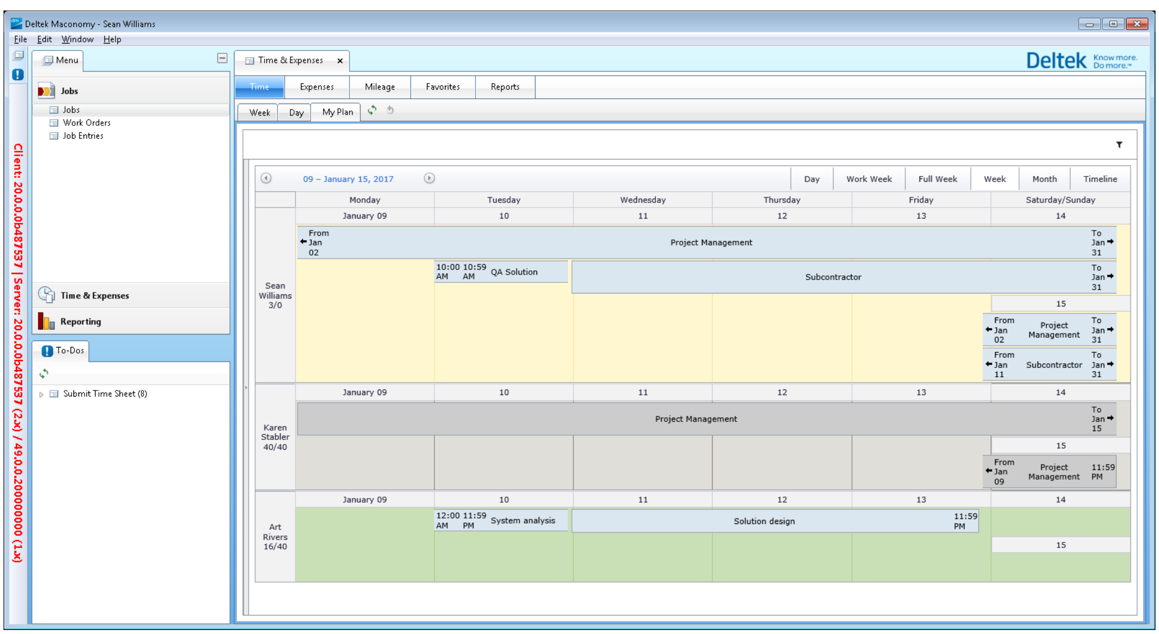
Full Week View



The Full Week view shows all of the days, while the Work Week view leaves out the weekends.

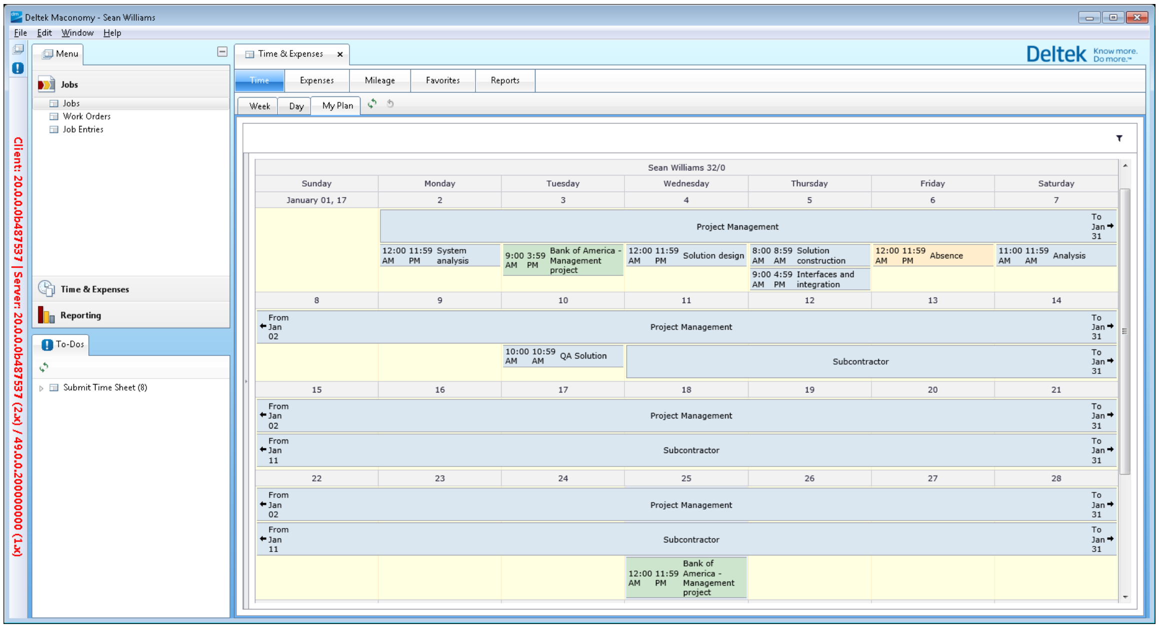
Week View

Like the Full Week view, the Week view is formatted for showing more than one resource at the same time.



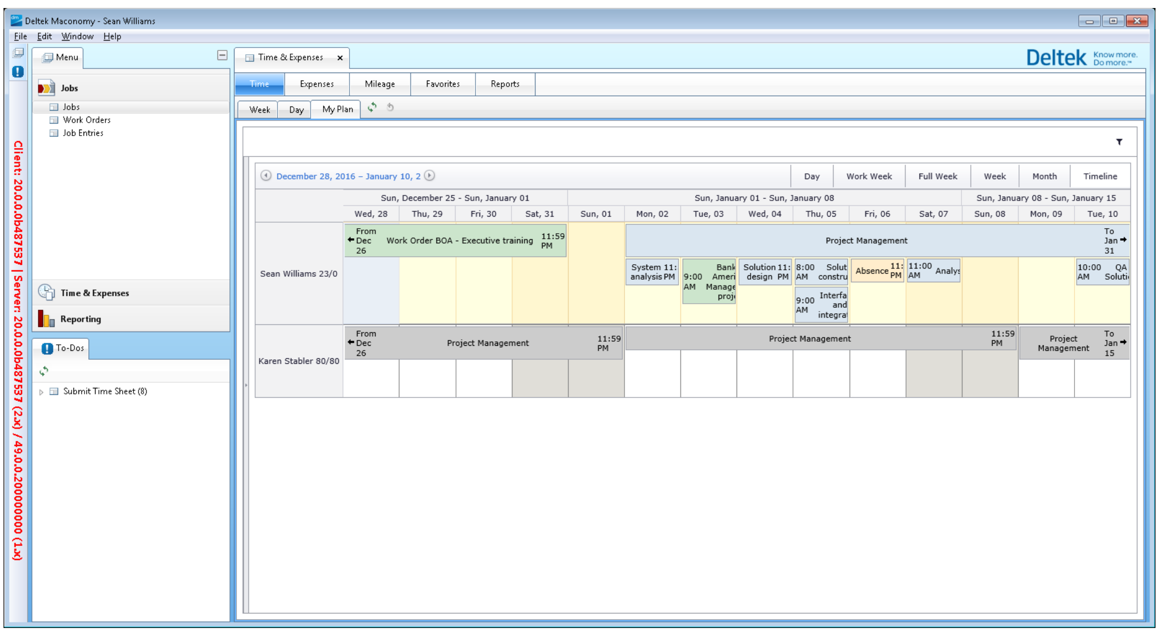
The extra calendars are shown in the order in which you selected the check boxes.

Month View



Timeline View

Like the Week view, the Timeline view is formatted for showing more than one resource at the same time.



People Planner WSC Components

The People Planner Workspace Client (WSC) Components can be embedded in various places in the WSC.

People Planner Assistants

Each location serves a specific purpose and is referred to individually as one of the People Planner Assistants. These are:

- Budgeting Assistant (BA) — Used primarily by Project Managers.
- Progress Evaluation Assistant (PEA) — Used primarily by Project Managers.
- Resourcing Overview (RO) — Used primarily by Project Managers.
- Resource Management (RM) — Used primarily by Resource Managers.
- Resource Plans (RP) — Used primarily by Project Managers.

Note: You must have Maconomy 2.5.4 or newer and People Planner 4.2 or newer to see all of the assistants. Before Maconomy 2.4, only the Budgeting Assistant was embedded in the WSC.

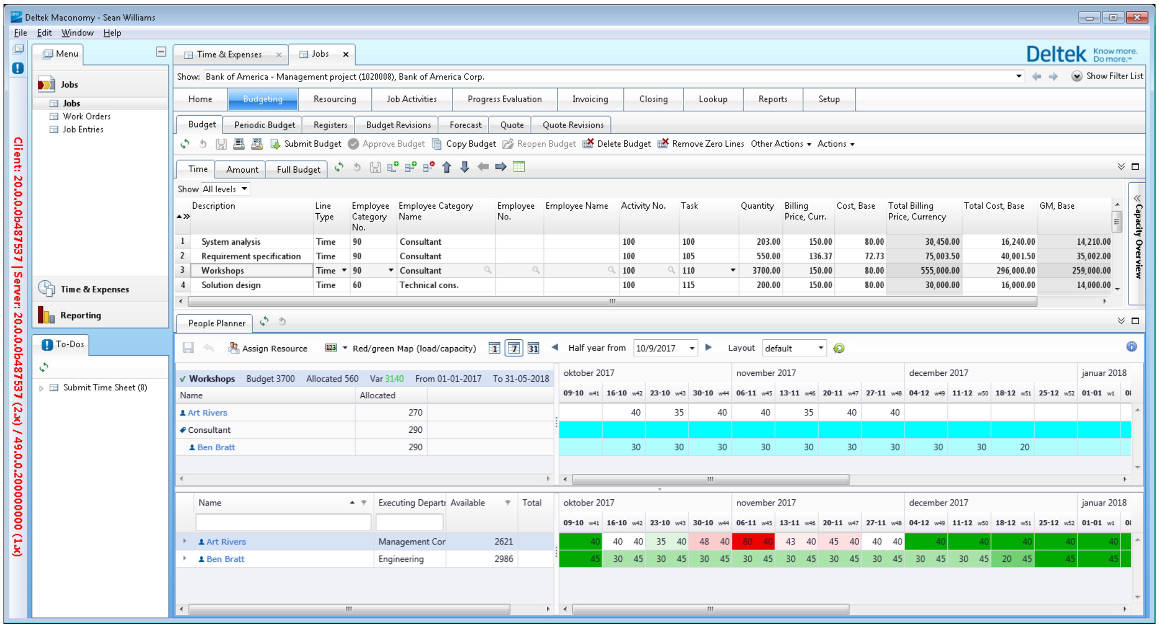
Attention: For information about configuring where the People Planner WSC Components are embedded in the WSC, see the *Deltek People Planner Integrations Guide*.

Budgeting Assistant

The purpose of the Budgeting Assistant (BA) is to help Project Managers with assigning resources to a task and booking them. The lower half of the BA shows how much available capacity each resource has.

The BA is embedded in the following locations:

- Jobs » Budgeting » Budget
- Jobs » Budgeting » Periodic Budget

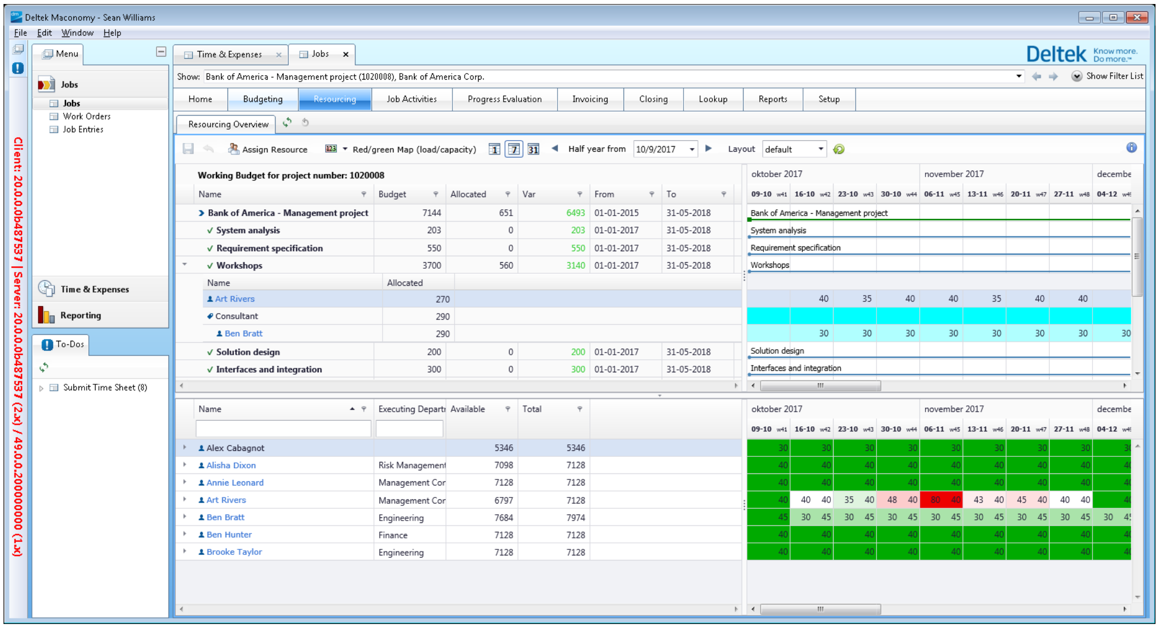


Resourcing Overview

The focus of the Budgeting Assistant is a single job; from that job, you can select each budget line individually to see the planning.

In comparison, the Resourcing Overview (RO) shows the full job. You can expand the assignments list of each task to see the assignments and bookings.

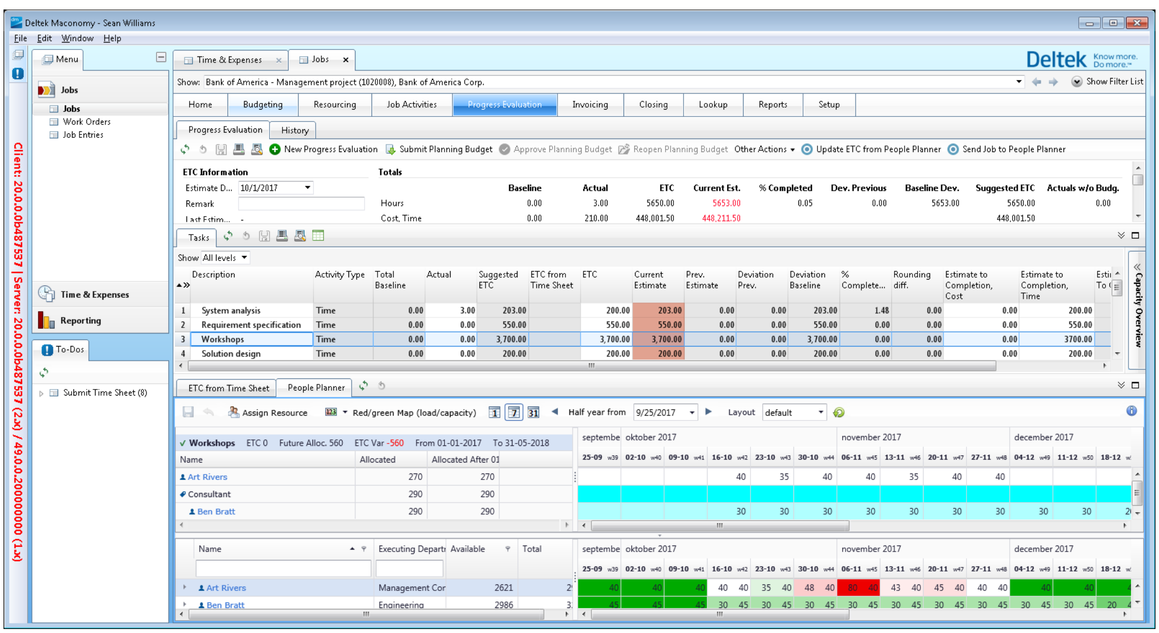
The RO is embedded in the Jobs workspace, under the Resourcing tab.



Progress Evaluation Assistant

The Progress Evaluation Assistant (PEA) is similar to the Budgeting Assistant, but the PEA's focus is to help Project Managers follow up on how the job progresses. You select the Estimate Date, and the PEA then displays the remaining time for the job after the selected date.

The PEA is embedded in the Jobs workspace, under the Progress Evaluation tab.

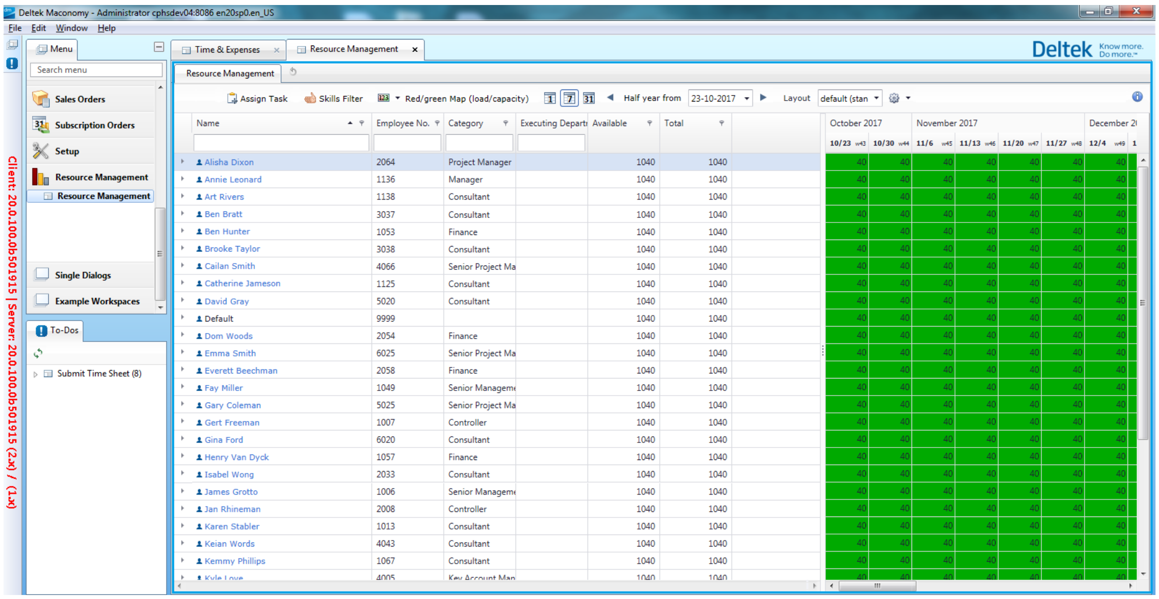


Resource Management

The Resource Management (RM) workspace is used primarily by Resource Managers.

Note: The list of resources that the RM displays is dependent on the user who is logged in to Maconomy, respecting data limitations, and possibly set to display only those resources for whom that logged-in user is the Resource Manager.

You access the RM workspace from the main Maconomy menu.



Resource Plans

Resource Plans (RP) uses the same functionality as the Resourcing Overview. However, this assistant displays several projects at a time to allow you to easily determine prioritization of resources or tasks across projects. You can expand each job to view the assignments and bookings.

For more information on working with tasks and assignments per job, refer to Resourcing Overview.

This is available from the main menu of Maconomy by navigating to **Menu » Jobs » Resource Plans**.

Budget

Before the People Planner WSC Component can display a job, you must first have sent the job, including its working budget, to People Planner. A way to do this is by clicking the **Send to People Planner** button.

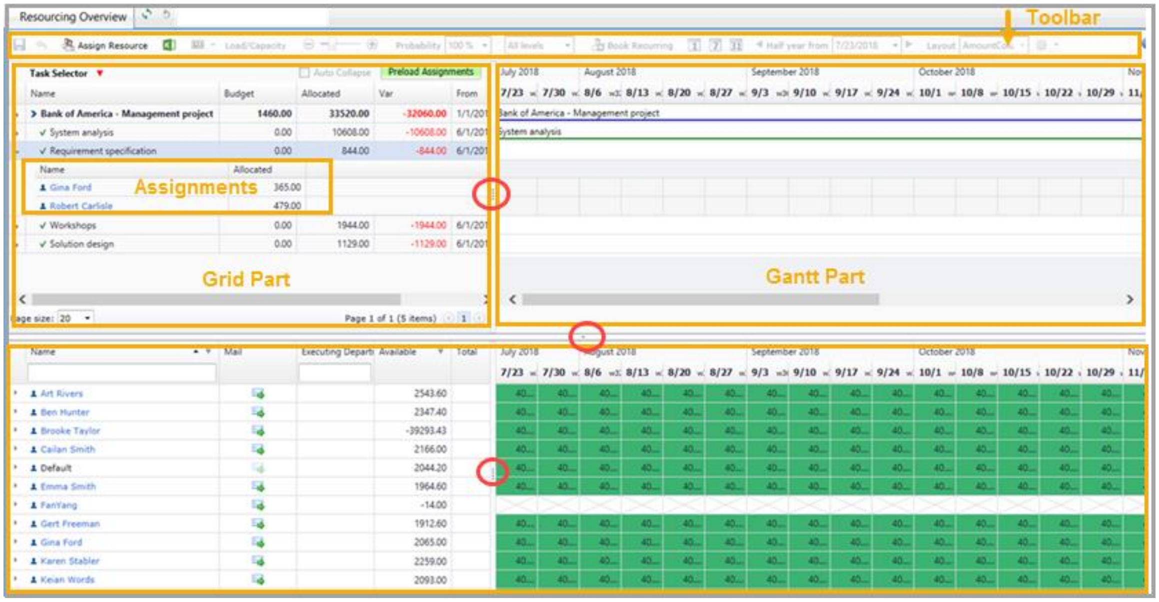
Note: For the Budgeting Assistant, you must also have switched the **Show Budget** field to showing the correct budget; this is usually the Working Budget. This is not necessary for the other assistants.

WSC Components Shared Functionality

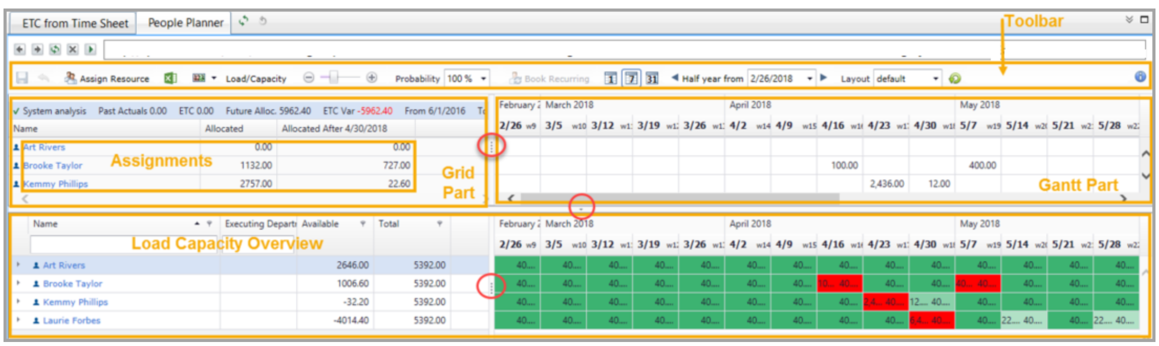
Much of the functionality of the People Planner WSC Components is available across all of the assistants, but there is also special functionality that applies to each specific assistant. This section describes the shared functionality; the specialized functionality is described in later sections.

The following two figures show the Resourcing Overview (RO) and the Progress Evaluation Assistant (PEA) divided into their individual regions. The Budgeting Assistant (BA) is like the PEA.

The Resourcing Overview



The Progress Evaluation Assistant

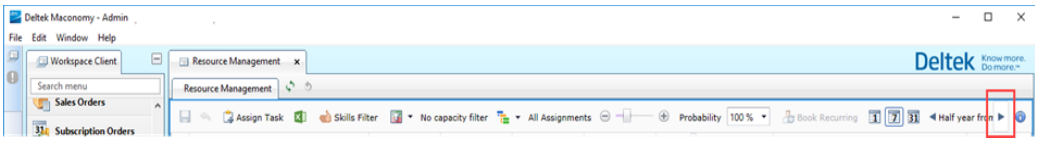


Toolbar

Each of the assistants has a toolbar.

> **Note:** Depending on how your system is configured and on which privileges you have, you may not see all of these buttons.

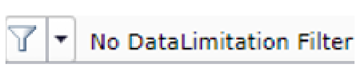
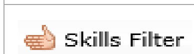
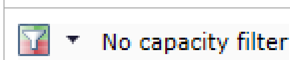
Tip: If the toolbar contains enough elements, it might not fit the window's size. However, you can scroll the toolbar to access the buttons and controls that are not currently visible. Click the arrow button at the end of the visible toolbar to scroll to the right (end) of the toolbar.



When the toolbar is scrolled all the way to the end, a left-arrow button is displayed so that you can scroll the toolbar back to the left.

The following table describes the buttons and other controls that may be available on the toolbar.

Tip: By default, all controls are displayed on the Web Component toolbars. However, you can customize the layout of the toolbar—for example, to hide controls that you do not use. See Customize the Toolbar.

Control	Description
	Use this button to save your bookings.
	Use this button to undo bookings that you have not saved yet.
	Use this button to assign resources or resource categories to the task. Budgeting Assistant, Progress Evaluation Assistant, and Resourcing Overview only.
	Use this button to assign tasks to the resource. Capacity Overview and Resource Management only. Depends on the Enterprise Workflow setting.
	Use this button to export information from the Project Managers Gantt (PG) chart and Resource Manager Gantt (RG) charts to an Excel file.
	Use this button to filter the grids according to the criteria in your selected data limitation.
	Use this button to filter the listed resources according to skills. Available in the Capacity Overview and Resource Management only.
	Use this drop-down to refine the list of available resources. You can display only those resources who are available within the required period and who also meet your capacity requirements.

Control	Description
	When you have selected a filter criterion, the label changes to indicate which criterion is in effect, such as Bookings in visible period less than 25%. For more information about this control, see Find Available Resources Based on Capacity.
	Use this button to filter the listed resources according to assignments. Click the drop-down triangle to choose one of the following: ▪ All Assignments: Displays all assignments and bookings, regardless of the visible period or any other criteria. Before People Planner 3.8.5 this was the only display option. ▪ Assigned in Visible Period: Displays assignments for events that are active in the visible period; that is, the event start date is before or equal to the visible period end date, and the event finish date is after or equal to the visible start date. ▪ Booked in Visible Period: Displays only assignments that have bookings in the visible period. ▪ Booked or New in Visible Period: Displays assignments that have bookings in the visible period, and also includes assignments in the visible period if they have no bookings at all—in other words, new assignments. ▪ Custom Assignment Filter: Displays assignments according to your custom criteria. For more information about this control, see Display Assignments Based on Specific Criteria.
	Use this zoom slider to zoom in ⊕ or out ⊖ in the Resourcing Overview, Budgeting, Progress Evaluation, and Resource Management displays.
	Click the drop-down arrow to choose a probability. For more information about this control, see Using Probability. For more information about the probability percentage functionality, see *Assign Probability to a Project* in the *Deltek People Planner Fundamentals Guide*.
	Use this button to create recurring bookings.

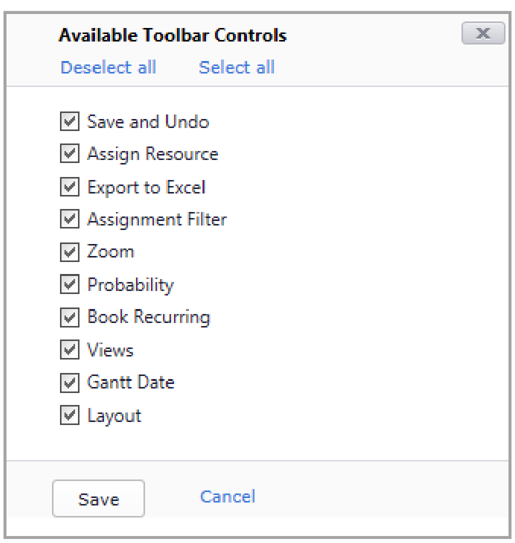
Control	Description
	You use these three buttons to switch between displaying the bookings on the daily, weekly, or monthly level.
	To keep the application responsive, it does not display the full project when a project has a substantial duration. You can use these buttons to choose a new visible period. The date control takes you to a specific date, and the two arrow buttons take you to the previous or the following visible period.
	Choose a layout from this drop-down list of layout names. This button is only visible if Web Layouts exist.
	Click this button to view information about your People Planner system.

Customize the Toolbar

You can customize the toolbar in the Web Components. You can hide controls that you do not use. You can only customize the toolbar for shared web layouts.

To customize the toolbar in a Web Component:

1. Navigate to the Web Component whose toolbar you want to customize.
2. Right-click on the toolbar to display the Available Toolbar Controls dialog box, as shown in the following figure.

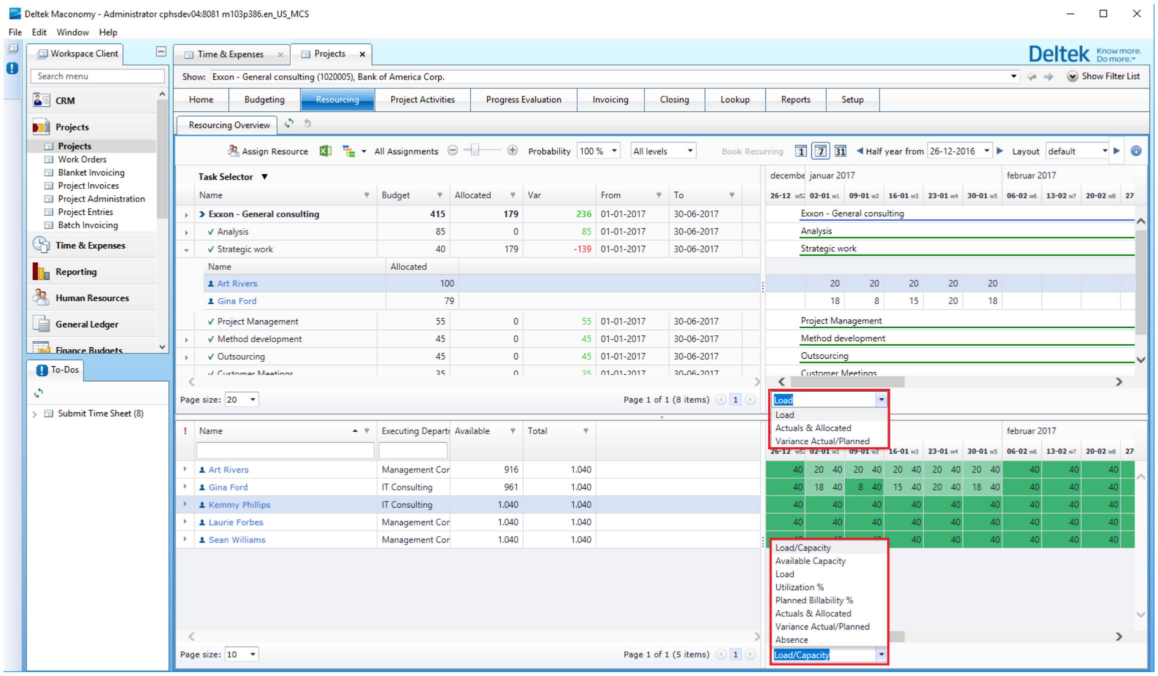


Tip: The ability to right-click on the toolbar to display this dialog box is provided only for shared web layouts. If you are using a personal layout (the default), the right-click option is not available.

3. Select the check boxes for the controls that you want to appear on the toolbar and/or deselect the check boxes for the controls that you want to hide.
4. Click **Save**. The toolbar is redisplayed, showing your changes.
5. Drag a control and drop it onto a new location on the toolbar to reorder the sequence of controls on the toolbar (optional). If later you un-hide a control, it is added to the end of the toolbar, but you can drag and drop it to another location.

Display Views Control

This control enables you to switch among display views. It is located at the bottom of assignment/capacity and project displays, but it includes different values in the drop-down list, depending on whether you are looking at resources or projects. The following figure shows an example of each.



For the resources view, you can choose from the following:

- Load/Capacity: Displays the load and capacity in hours. A value of 0 (zero) is displayed as a blank. For resources that have no capacity, the cell is marked out with an “X.” Resources that have available capacity are displayed with green backgrounds; overbooked resources are displayed with red backgrounds. If a resource’s load and capacity are equal, the cell background is white. This view is displayed by default.
- Available Capacity: Displays only capacity. This uses the same red/green color scheme for cells to indicate load/capacity.
- Load: Displays the load in hours for each resource. A value of 0 (zero) is displayed, rather than being left blank. This view uses the same color scheme as the red/green map.
- Utilization %: Displays the load/capacity as percentages, rather than in hours. This view uses the same color scheme as the red/green map.
- Planned Billability %: Displays bookings on billable events/capacity as percentages. Each event (task) has a Billable property that determines whether the event is billable; this property can be linked to a dimension to make that determination. You set up this link in the Admin Tool, at **System Setting » Project » Dimension** and column used for billable events. This view does not use any color scheme.

- Actuals & Allocated: Displays time registrations (actuals) and booked hours (allocated).
- Variance Actual/Planned: Displays time registrations (actuals) minus planned hours (bookings).
- Absence: Displays absence (in hours), such as leave, illness, or vacation.

For the project view, you can choose from the following:

- Load: Displays the load in hours for each resource. A value of 0 (zero) is displayed, rather than being left blank. This view uses the same color scheme as the red/green map.
- Actuals & Allocated: Displays time registrations (actuals) and booked hours (allocated).
- Variance Actual/Planned: Displays time registrations (actuals) minus planned hours (bookings).
- Progress Evaluation: Displays bookings made before and after the estimate date separately. Bookings made before or on the estimate date are read-only. You can only create and edit bookings made after the estimate date in this view. Depending on your setup, this view displays the default estimate date in People Planner or uses the estimate date from Maconomy.

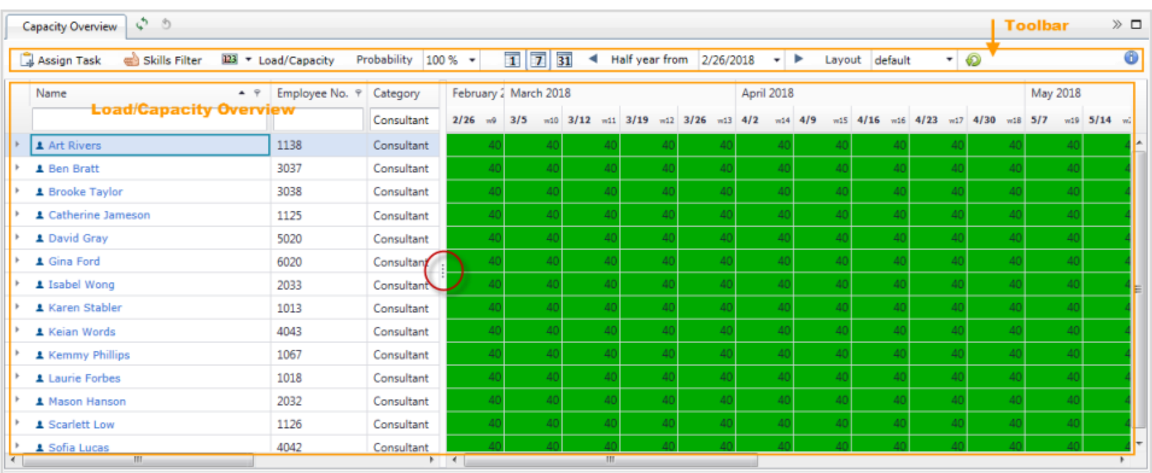
Main Sections

The BA, PEA, and RO are divided into two main sections: The top part, showing the project or task information, and the bottom part, showing load and capacity information.

Active Filter Indicator

Note that a red exclamation mark—**!**—is displayed to indicate that a column filter is active. In addition, a tool tip indicates which filter criteria are active.

The Resource Management (RM) window has only a single section. It corresponds to the lower section of the BA, PEA, and RO.



The sections are divided into a left-hand "grid" part and a right-hand "Gantt/booking" part, but other views also exist.

These two parts are separated by a vertical divider line (red circle in the preceding figure), which you can drag to adjust the size of each subsection.

Tip: A vertical blue line in the Gantt part indicates today's date.

When using the assistants, you must first select a job.

In the RO, the grid part then shows the entire job/project.

For the BA and PEA, you must also select a budget line; the grid part then shows the assignments for the selected budget line/task.

In the RO, you can select a task and expand the assignment sub-grid to see its assignments. You can expand resources to see how the load is spread over individual tasks.

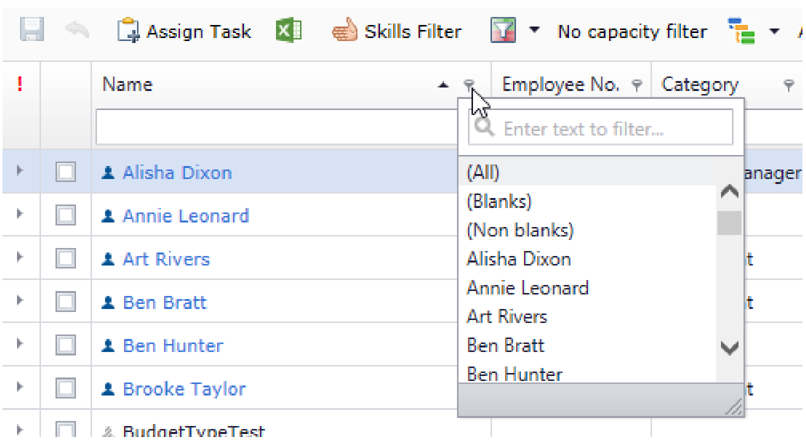
In the rest of this section, most of the figures are based on the Budgeting Assistant, but the description applies to all three contexts.

Filtering, Sorting, and Grouping by Columns

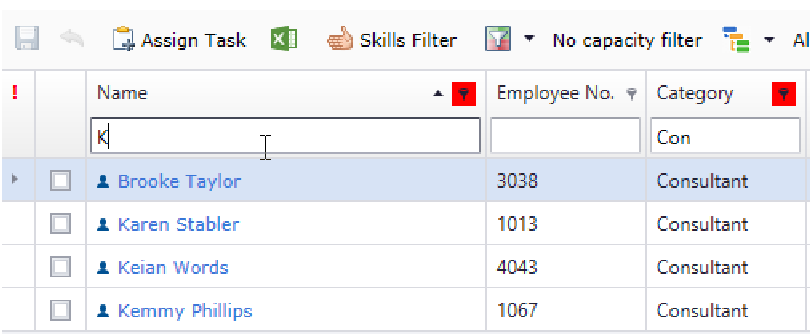
You can customize your view with the following options.

Filtering

You click on the Filter icon to display a dialog where you can select columns to filter on, as the following example shows.

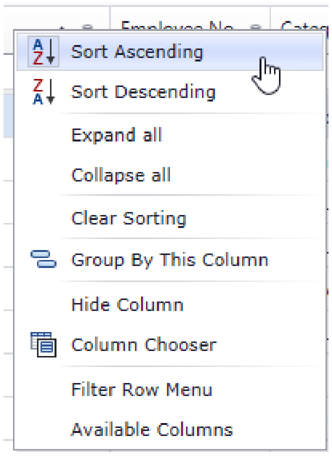


You can also use the header to define a filter criterion, such as choosing to view resources starting with "K" who are consultants, to find a specific resource.



Sorting

You can click on any column header to sort it by alphabetical order. Alternately, you can right-click on a column header to access a shortcut menu that enables you to Sort Ascending, Sort Descending, or to clear the sorting selection.



Grouping

Right-click on a column header to access a shortcut menu that enables you to group or ungroup lines accordingly.

Hide the Capacity Pane

Hiding the Capacity pane—the red/green map—can significantly improve performance when panes are loaded.

> **Tip:** If the Capacity pane is hidden, and you need to display it, you can click on the vertical splitter (arrow) to open it.

If you are a People Planner Administrator, you can use settings in the Admin Tool to control whether the Capacity pane is hidden or displayed.

- **Hide Capacity pane in Assign Resource:** Select this setting to automatically hide the Capacity pane in the Assign Resource dialog. The value that you choose for this setting serves as the default for the first time that a user accesses the Assign Resource dialog during a session. However, each user can hide or display the Capacity page by clicking the vertical splitter. The default state of this setting is *not selected*.
- **Hide Capacity pane in Projects:** Select this setting to hide the Capacity pane in project information in Resourcing, Budgeting, and Progress Evaluation. The value that you choose for this setting serves as the default for the first time that a user accesses project information in one of these assistants during a session. However, each user can hide or display the Capacity pane by clicking the vertical splitter during a session. The default state of this setting is *not selected*.

Tasks and Amount Lines

People Planner can display various types of lines. The most common are Task lines related to time, but all Task lines can be displayed, such as summary lines, absences, and milestones. One attribute that these line types have in common is that all bookings that you enter on these lines are considered to be in hours.

Amount lines were added to People Planner as of Release 3.8.4. Bookings made on an amount line are considered to be a monetary amount, rather than a number for hours.

Assignments

You can assign resources and resource categories to a task in the Budgeting Assistant, the Progress Evaluation Assistant, or in the Resourcing Overview.

Tip: You cannot assign resources on an amount line. Instead, amount lines are automatically assigned a special Amount Line Resource. You cannot unassign this resource or reassign it. Note, however, that an exception to this is assignments that were created during the import of actuals.

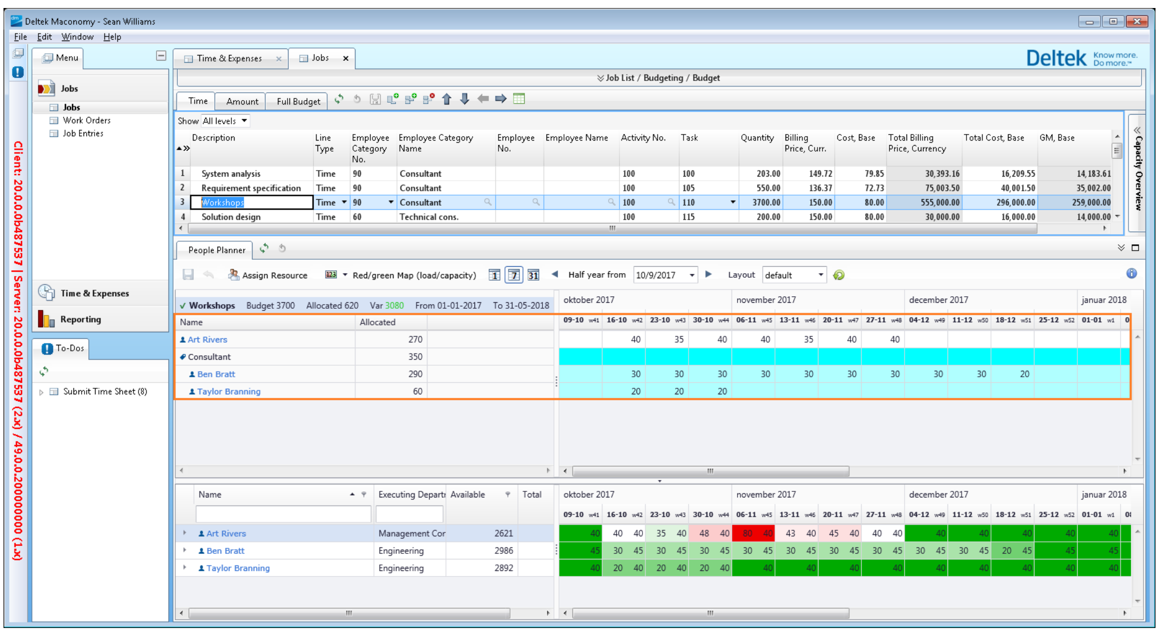
If you have assigned a resource category on a task, you can sub-assign resources directly on the resource category.

Note: Depending on how the system is configured and on which privileges you have, you might not see the Assign Resource button.

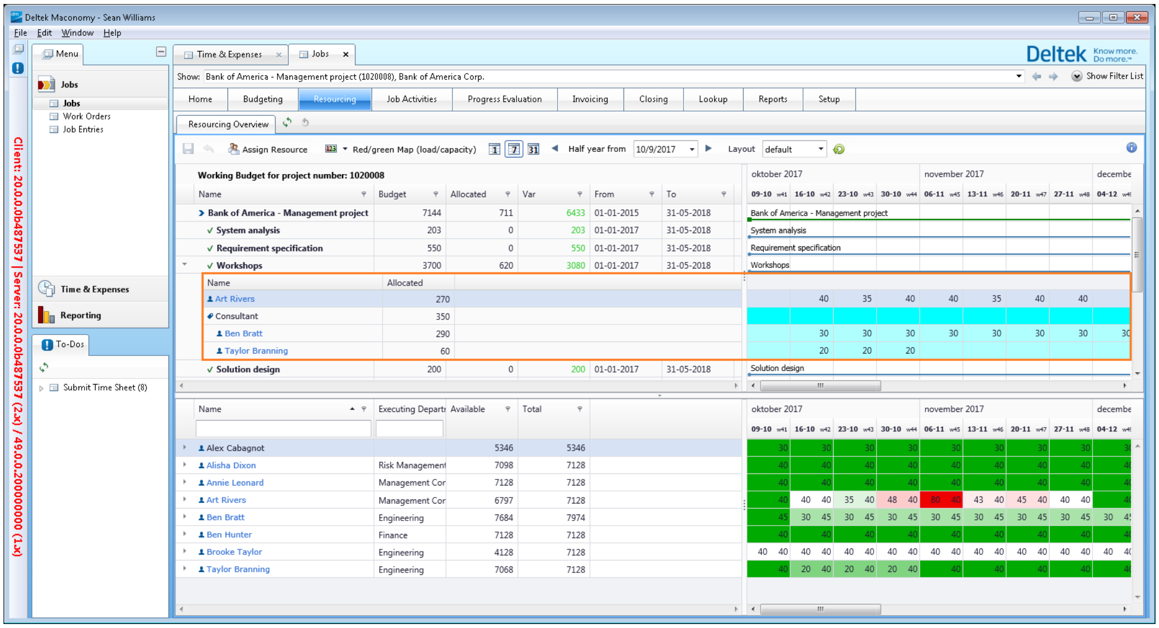
Alternatively, you can instead assign an employee and an employee category on the budget line and then export this assignment to People Planner.

Tip: See the *Deltek People Planner Integrations Guide* for details about how to configure the import of jobs into People Planner and how to automatically assign resources and resource categories on the tasks, based on how they have been assigned to the budget lines in Maconomy.

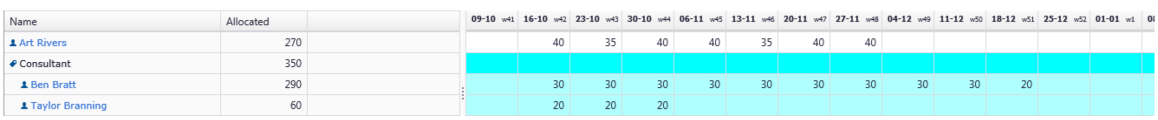
Assignments are displayed as individual lines just below the name of each budget line. The following figure shows how this looks in the Budgeting Assistant.



The following figure shows how this looks in the Resourcing Overview.



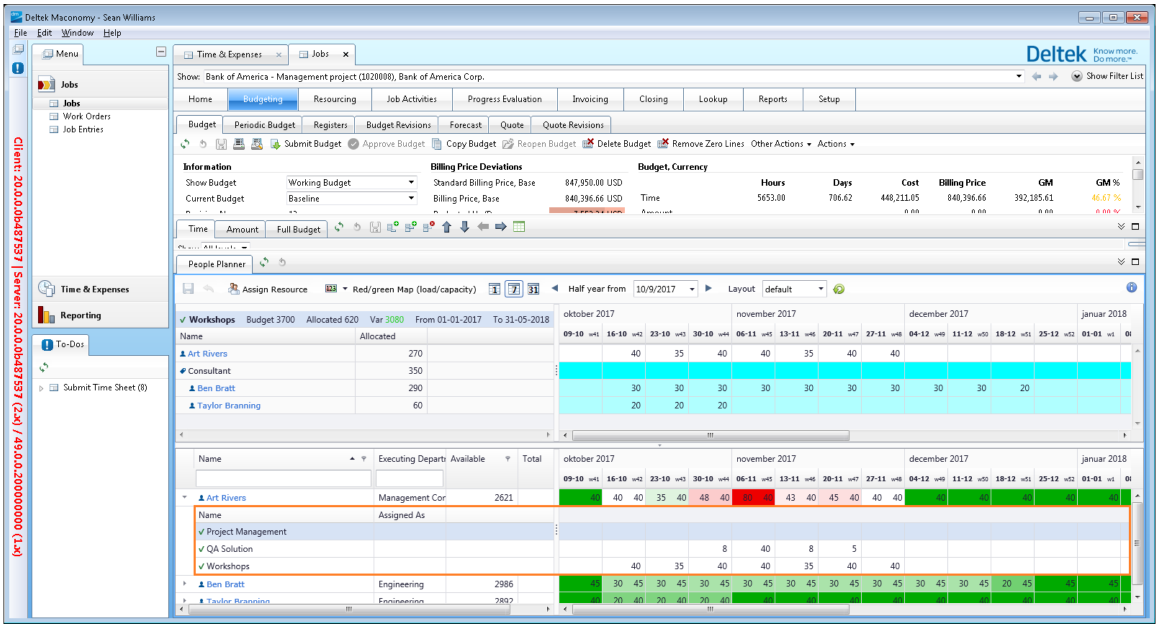
Each assignment line is divided into a left half and a right half. The left part displays the name of the resource and has one or more columns that sum up the key numbers of the assignment. The right part displays the bookings and is divided into cells that represent the individual dates.



The icon in front of an assignment line indicates whether it is a resource or a resource category that has been assigned to the task. Sub-assignments are displayed indented under the resource category assignment.

The lower section shows all resources that are assigned to any of the tasks in the upper section. An exception to this is when the Absence display view is chosen, in which case the lower section displays only resources that have absences.

This section shows you the resources and how they have been assigned and booked on budget lines and jobs. The bookings are summed up on the resource line; you can expand the resource to see the individual assignments and bookings.

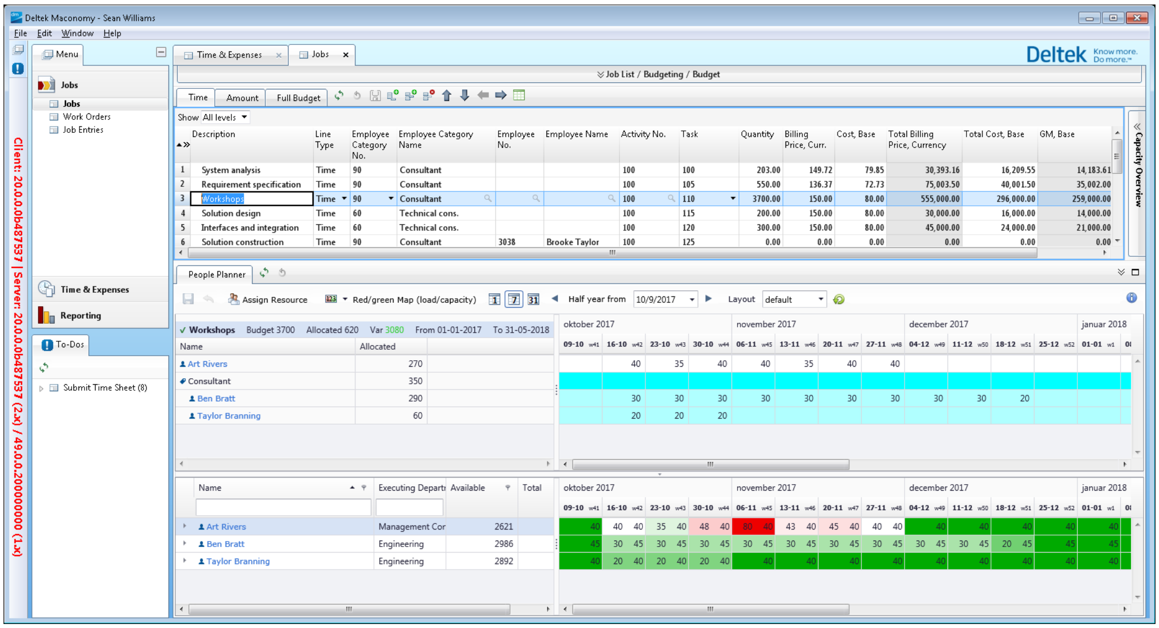


Assign a Resource

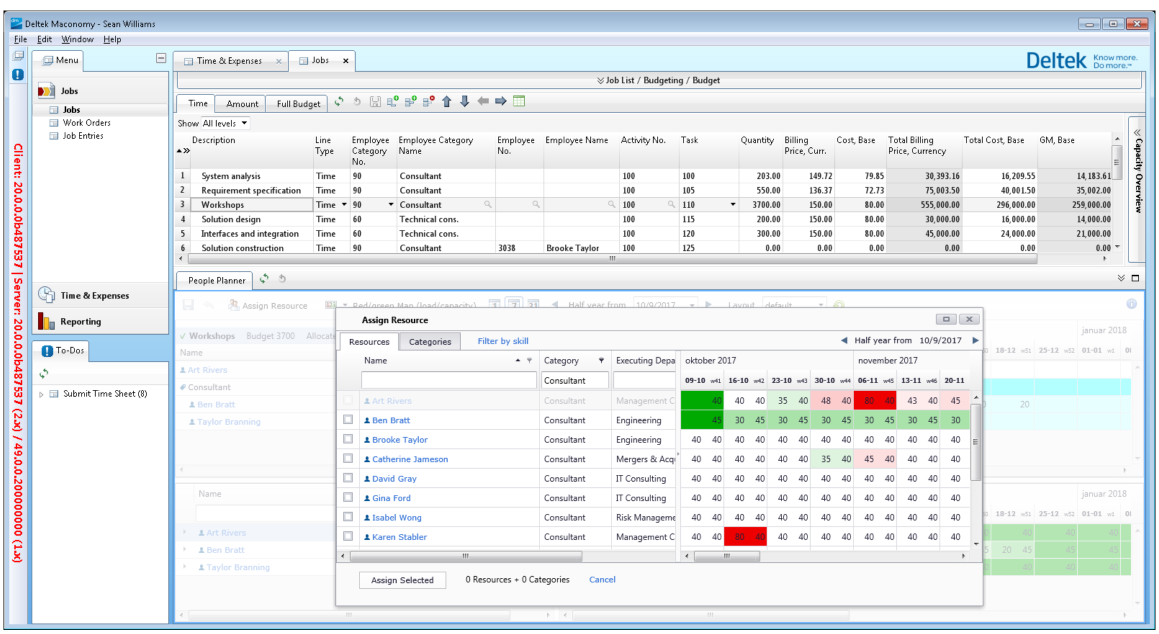
Use these steps to assign an employee to a budget line.

To assign a resource:

1. Select the budget line.



2. Click the **Assign Resource** button. This opens the Assign Resource dialog box, which has two tabs, Resources and Categories.

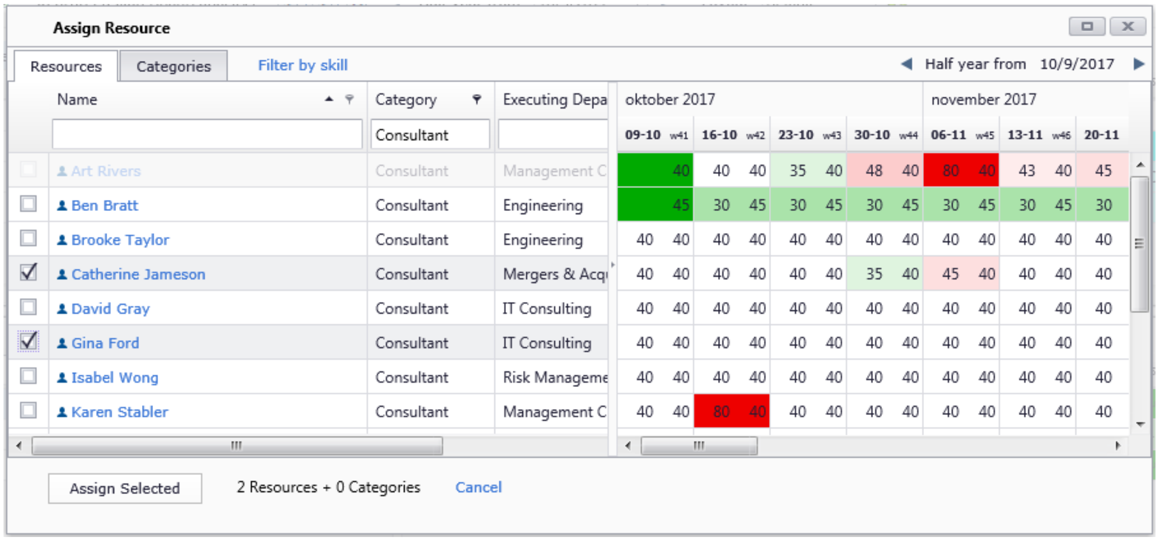


3. Click the Resources tab.

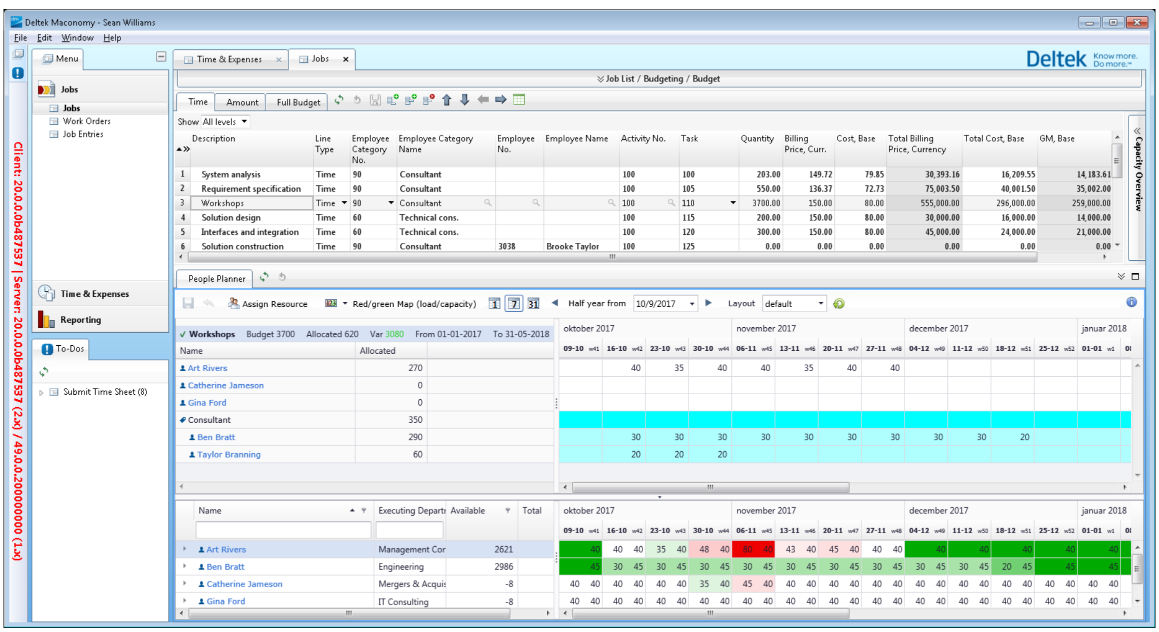
   To help you find the correct resource this tab is filtered to display only the resources that have the same resource category as the selected budget line. You can clear this filter if you need to assign a different resource. See Filtering in the Assign Resource Dialog.

> **Note:** The Resources tab shows all resources. Those resources that you cannot choose—for example, because they have already been assigned to the task or because they are blocked—are disabled so that you cannot select them.
>
> When you hover your mouse over a blocked resource, a tool tip explains why it is disabled.

4. Select one or more of the resources by selecting its check box in the first column. On the right side of the tab, you see the current load and capacity of each of the resources.



5. Click the **Assign Selected** button to assign the selected resource(s) to the task.

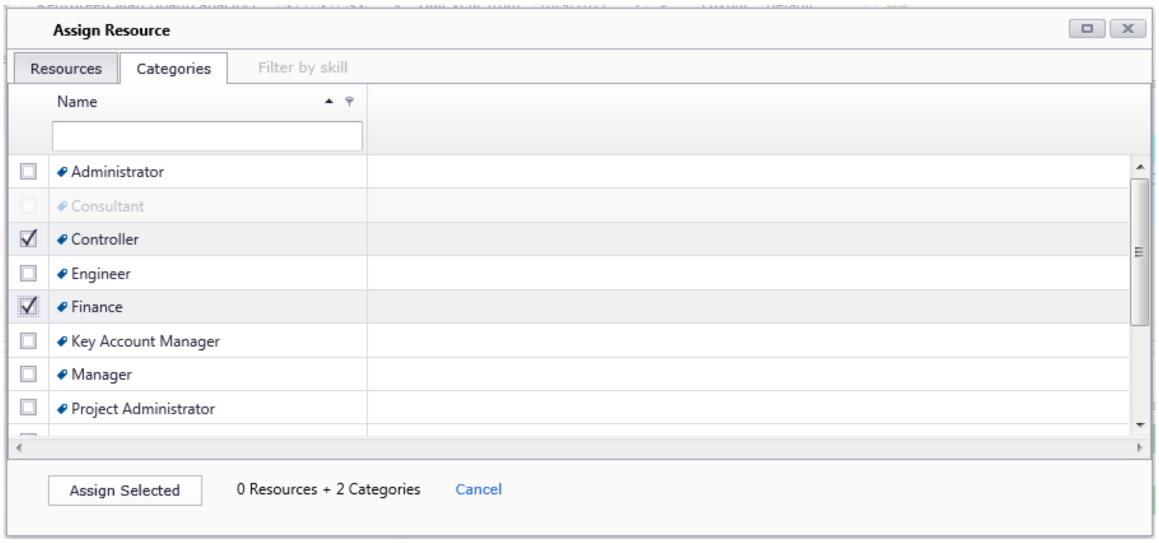


Assign a Resource Category

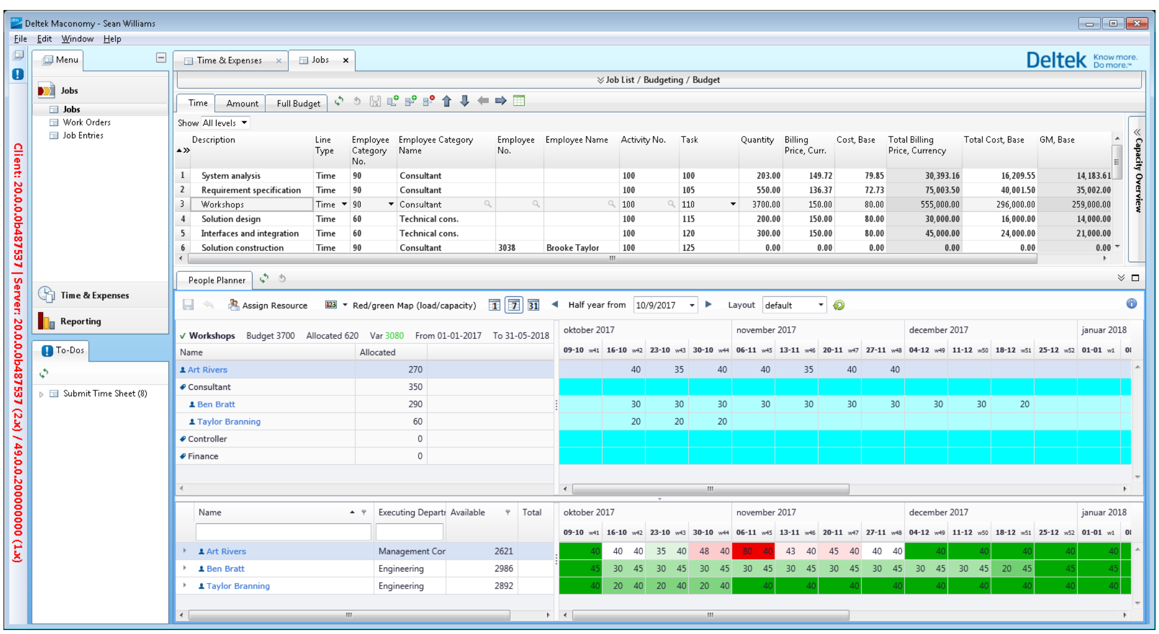
Use these steps to assign a resource category to a budget line.

To assign a resource category:

1. Select the budget line.
2. Click the **Assign Resource** button. This opens the Assign Resource dialog, which has two tabs, Resources and Categories.
3. Click the Categories tab.
4. Select one or more of the resource categories by selecting the check box(es) in the first column.



5. Click the **Assign Selected** button to finish.

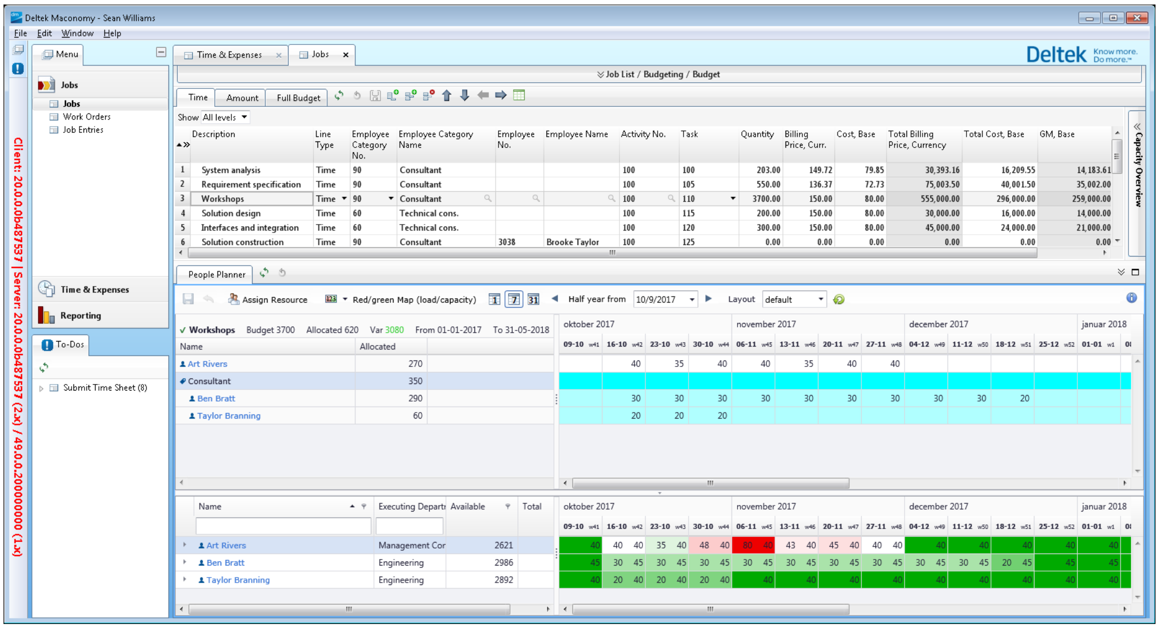


Assign a Resource on a Resource Category

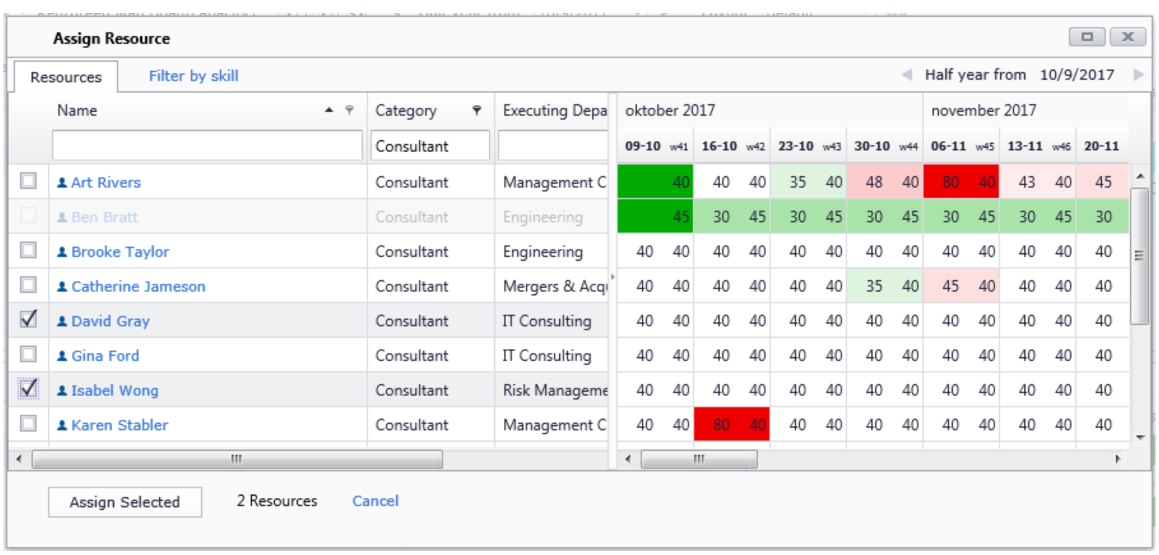
If you have already assigned a resource category to a budget line, you can then assign resources on the resource category. This type of assignment is sometimes called a sub-assignment.

To create a sub-assignment:

1. Select the budget line.
2. Select the assigned resource category.

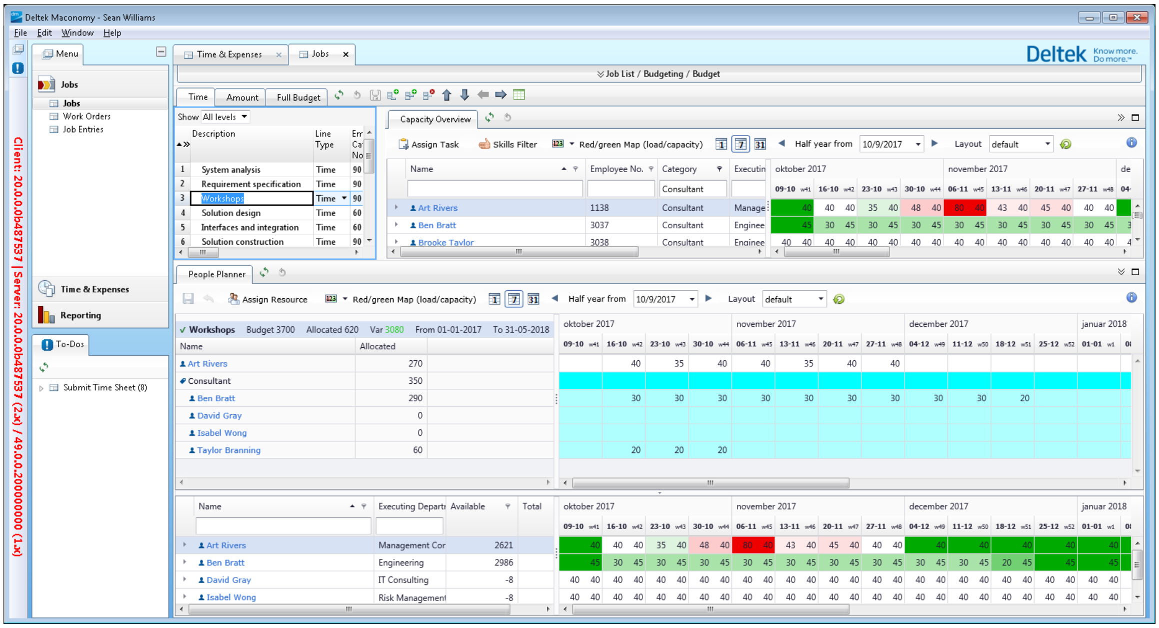


3. Click the **Assign Resource** button. This opens the Assign Resource dialog box; however, this time it has only one tab, Resources.



To help you find the correct resource, this dialog box is filtered to display only the resources that are of the same resource category as the assigned resource category. You can clear this filter if you need to assign a different resource. See Filtering in the Assign Resource Dialog.

4. Select one or more resources by selecting the check box(es) in the first column.
5. Click the **Assign Selected** button to finish.

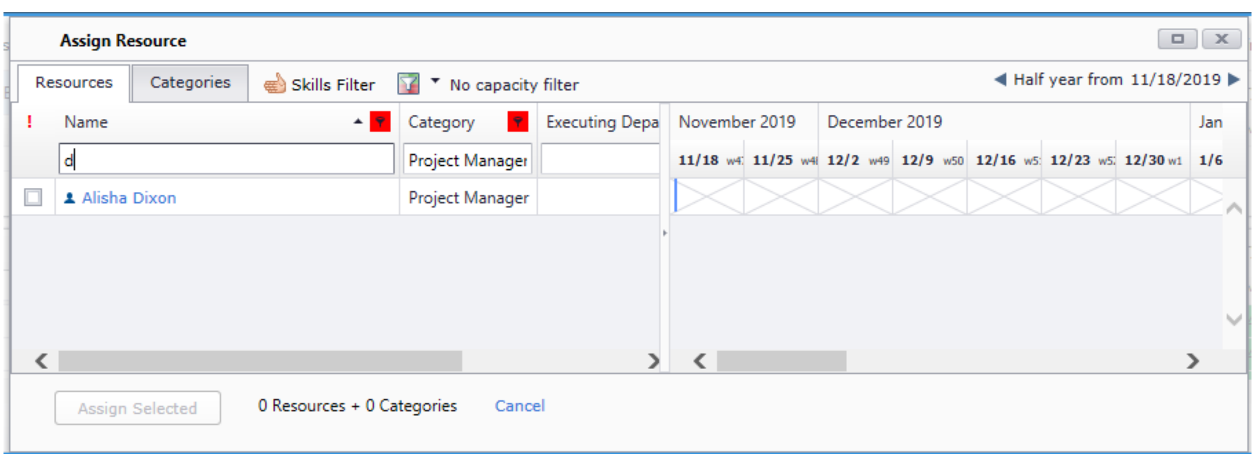


Filtering in the Assign Resource Dialog

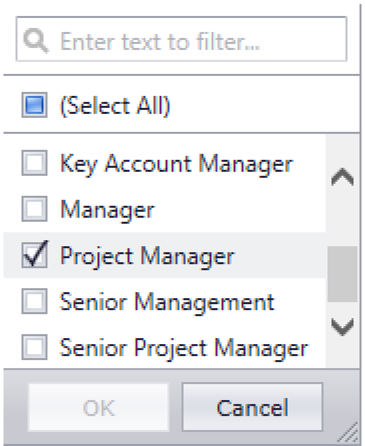
If the list of resources in the Assign Resource dialog box is too long, you can filter on the resources by setting an appropriate search criterion.

Filter on Columns

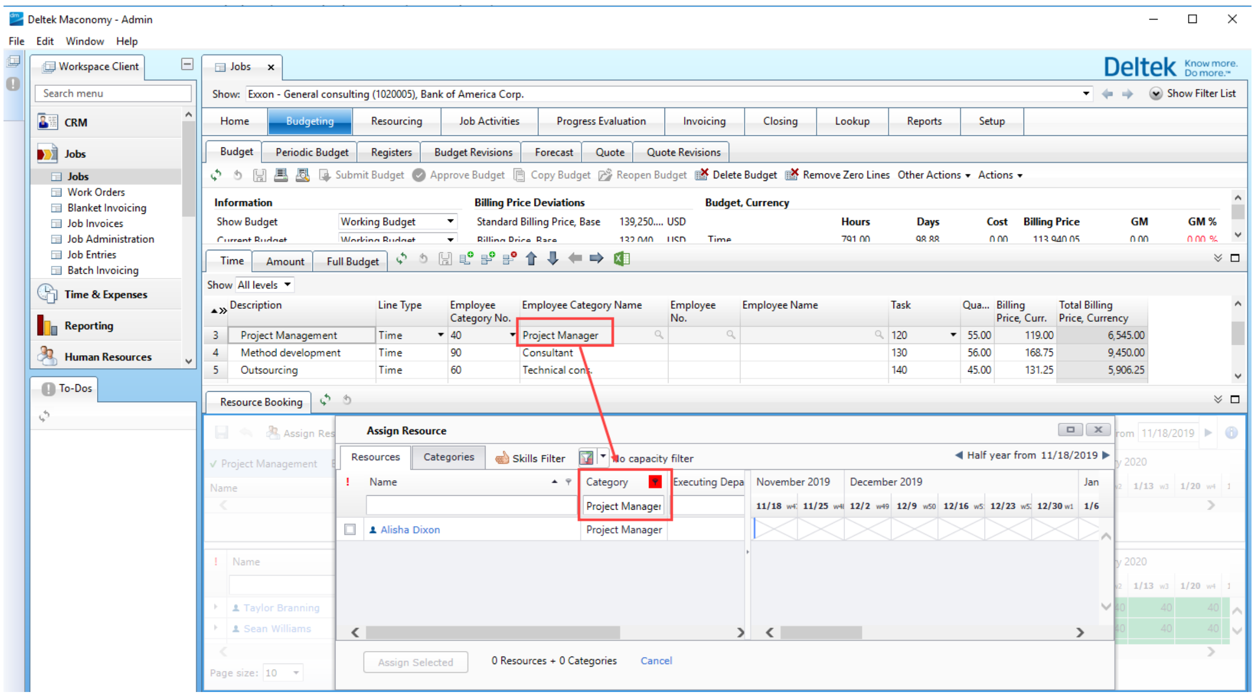
You can use the header to define a filter criterion. In the following figure, the selected filters mean that you are only interested in resources where the name starts with a "D," and they are of the "Project Manager" resource category, for example, because you are looking for a specific known resource.



By default, the Category filter is filled in for you. If the budget line has been assigned an Employee Category, People Planner sets the corresponding resource category as the filter in the Category column.



This means that you only see resources that are of the same category as the budget line. If you want to assign other resources, you can clear the filter.



Note: In Maconomy, an employee can be a member of more than one employee category. In contrast, People Planner only supports a single employee category per employee. When you export employees from Maconomy into People Planner, the export therefore selects the first of the possible employee categories and disregards the rest. An unfortunate consequence of this is that the category filter may in fact not show all the resources that have the selected category in Maconomy. If you have this problem, you can simply clear the filter on the Category column.

Filter on Skills

Another option is to filter on resources with specific skills. When you click in the **Name** field, skills are sorted by name in ascending or descending order, which you indicate by toggling the arrow next to the

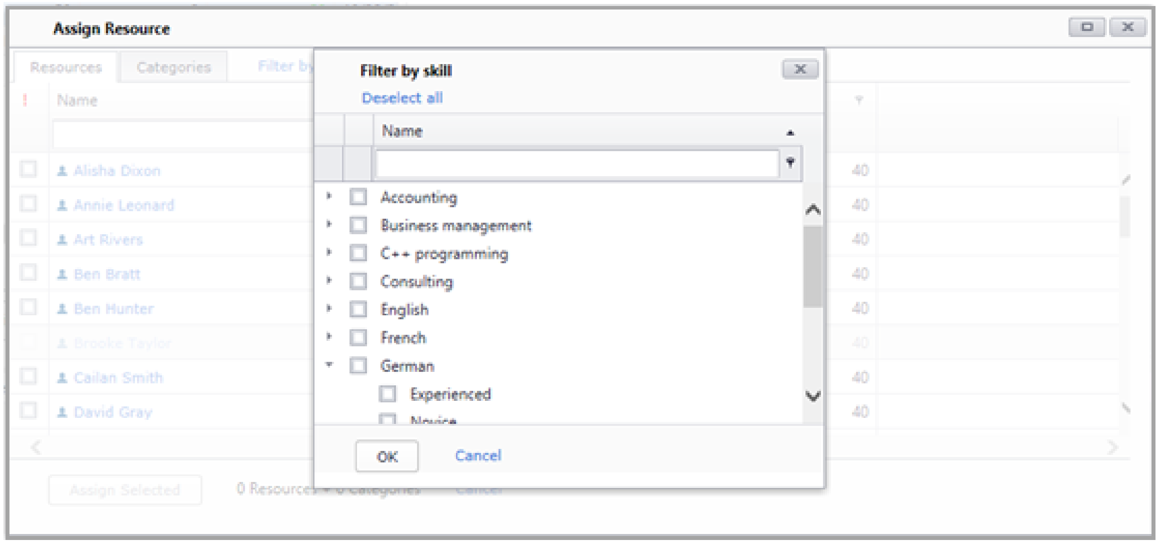
Name field up or down. Then, the text that you enter is used to filter the skills to be displayed so that you can select them, according to the filter type that you select. The default is “Contains.”

Filter on Resources with Specific Skills

Use these steps to find resources with the specific skill you need.

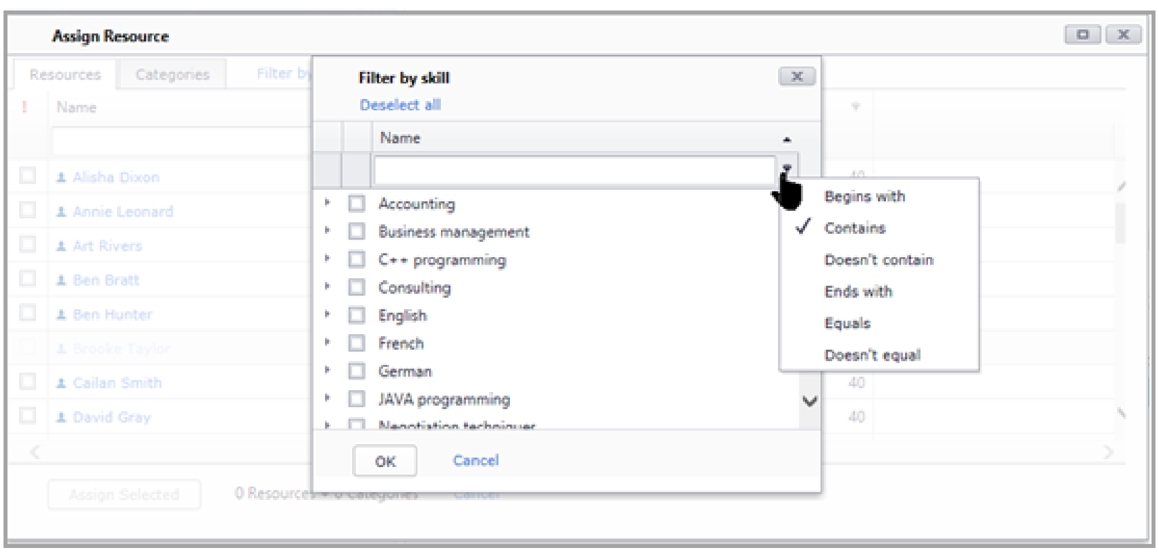
To filter on resources with specific skills:

1. Ensure that the Assign Resources dialog box is open.
2. Click the **Filter by Skill** link. This opens the Filter by Skill dialog box, which shows a hierarchy of skills that you can select, and in the next layer, the levels of expertise that you can select.

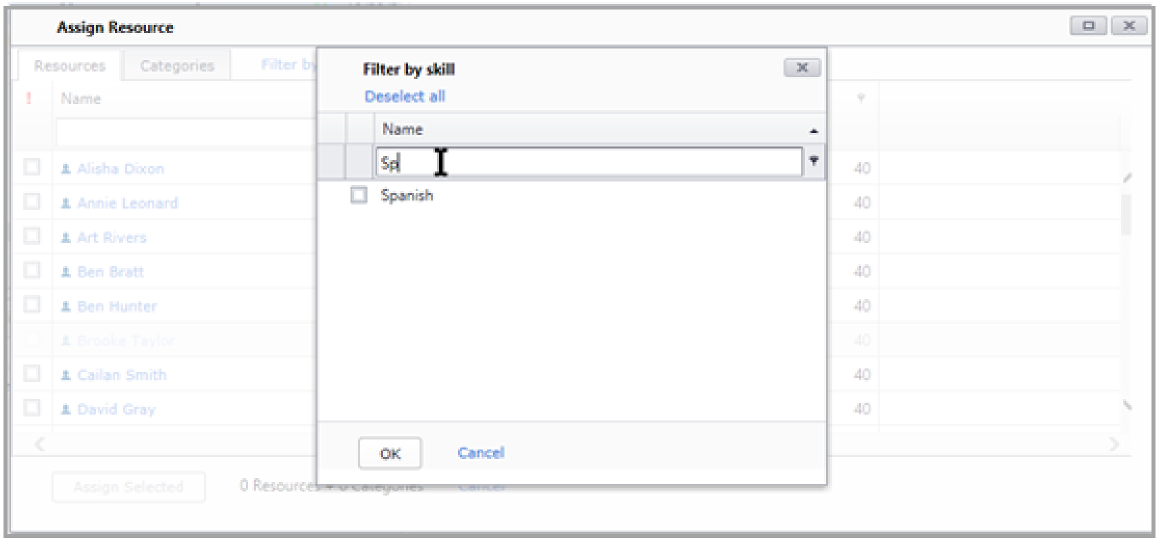


3. Do **one** of the following:
   - Select one or more skills and levels by selecting their check boxes.
   - If you have a long list of skills, use the Name filter to locate the skills that you want to select:

     a) Right-click in the **Name** field to choose an operator from the pop-up. The default value is *Contains*.



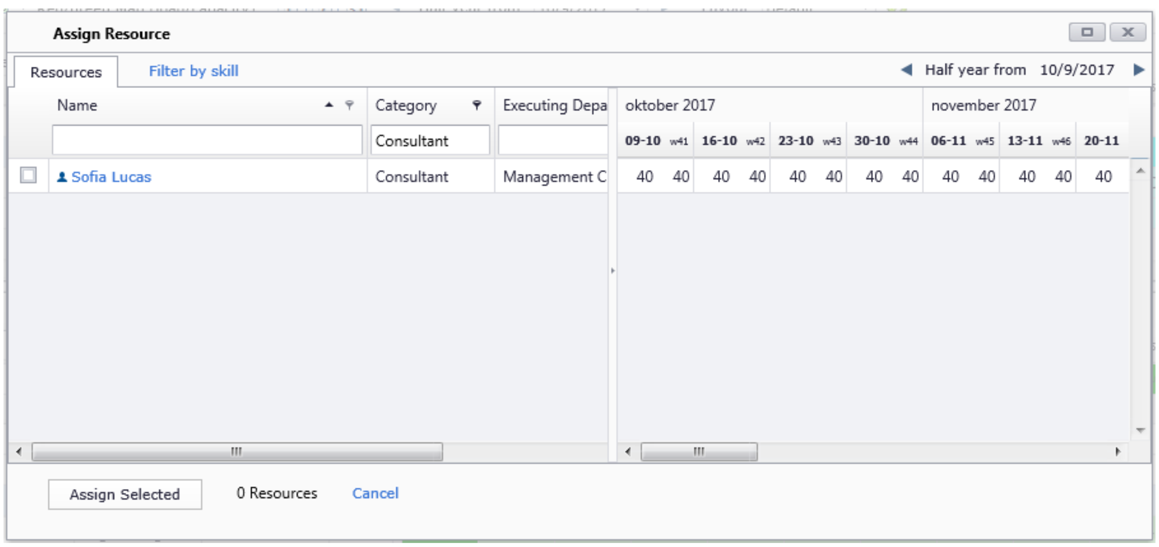
b) Begin typing the name of a skill that you want to select in the **Name** field—for example, you want to find **Spanish** so that you can select it.



c) The Skills list scrolls to that skill so that you can select it. You can continue searching for and selecting additional skills and levels of expertise as appropriate.

4. Click the **OK** button.

The Assign Resource dialog box now shows only the resources who have the specified skills.

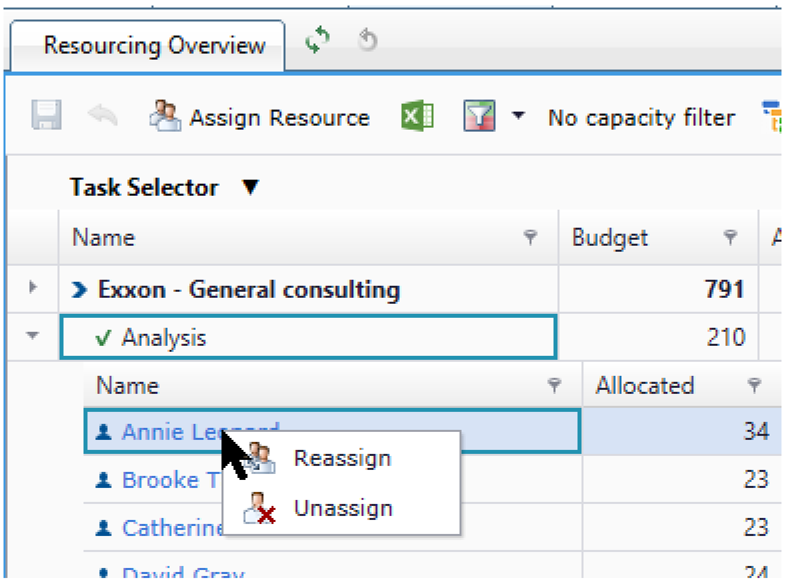


Note: You must choose the specific level of expertise for the skills. If you specify that the resource must be able to master German at the Novice level, you do not automatically get the resources who master it at a higher level. If you do not care about the level, you can select the check box directly on the skill itself.

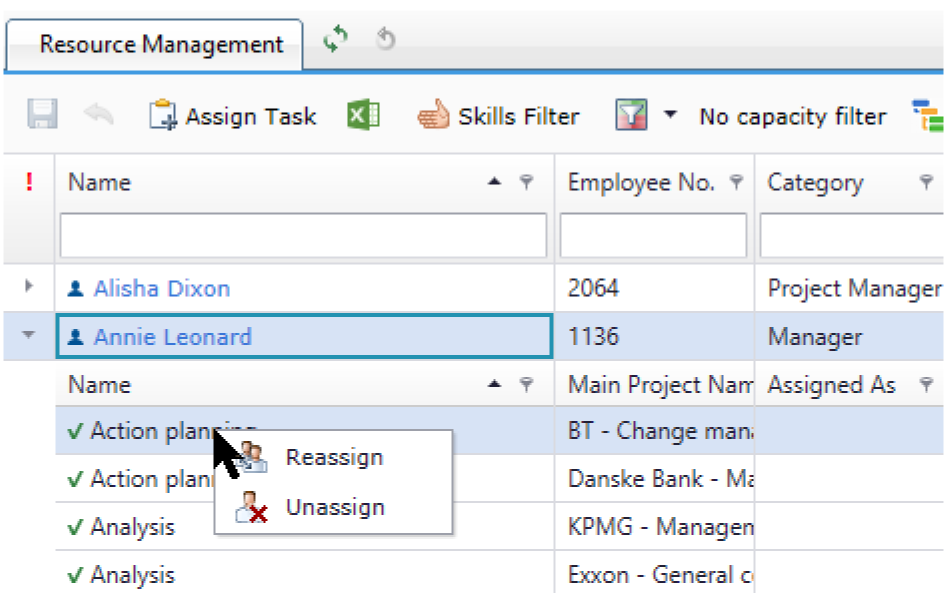
Reassign a Task to a Resource

You can reassign an assignment/task from one resource to another resource within a specific period using the Reassign shortcut menu option in the Resourcing Overview and in Resource Management. The following figures show examples.

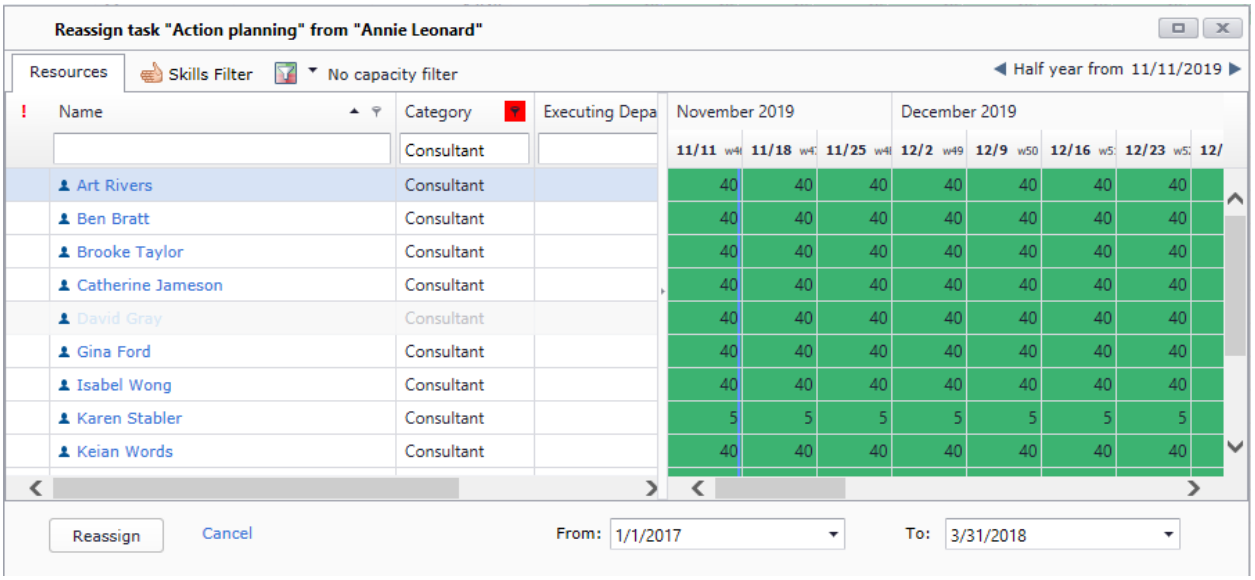
In the Resourcing Overview



In Resource Management



When you click **Reassign** on either shortcut menu, a dialog box appears so that you can reassign the task to another resource. The following figure shows an example of this dialog box.



The title bar of the dialog box displays the name of the task and the name of the resource to whom it is currently assigned. If today's date is inside the task duration, the From date defaults to today. Otherwise, the From date defaults to the task start date. The To date always defaults to the task end date.

Two tabs can appear in this dialog box: **Resource** and **Categories**.

- If you are reassigning a task to another resource:
  - The Resources tab is always visible.
  - The Categories tab is hidden if the assignment contains any bookings—that is, man-hour entries—because those cannot be moved to a resource category.
- If you are reassigning a task to a resource category:
  - The Categories tab is always visible.
  - The Resources tab is hidden if the resource category assignment has any sub-assignments, because resource assignments cannot have sub-assignments.

You can edit the From and To dates of the task in this dialog box. The following example shows how useful this can be:

- A resource has been assigned on a task that runs for the entire year 2018.
- Planning has been done on this resource—for example, 40 hours in every week.
- Then something occurs that makes it necessary for that resource to work on something else, or to be absent, during the month of July.
- If the task that is assigned to this resource cannot be left with no one working on it during July, you must reassign it to another resource during July.

When you have selected the resource to whom you want to reassign the task, and you click **Reassign**, the following occur:

- If there is no overlap in the selected date range and task duration, the following message is displayed:

  The "[*name of project*]" ([*start date*]…[*end date*]) is outside the specified date interval.
- If the From date is after the To date, the following message is displayed:

The From date must be before the To date.

- If neither of those errors occurs, all bookings (man-hour entries) for the selected task are moved to the resource whom you selected for the specified period. Only the planned hours are moved with the reassignment. Values on other accounts—where bookings, time registrations, amount bookings, and so on go—are not moved as a result of this reassignment.

To reassign a task to another resource:

1. Perform one of the following:
   - In the Resourcing Overview, navigate to the task that you want to reassign, locate the name of the resource to whom it is currently assigned, and right-click on that resource's name.
   - In Resource Management, navigate to the resource to whom the task is currently assigned, locate the task, and right-click on that task's name.

   A shortcut menu appears that includes the Reassign option, as illustrated in the preceding example figures.
2. Select the **Reassign** option on the shortcut menu. A dialog box like the preceding example displays.
3. Select the resource to whom you want to reassign the task, then click **Reassign**.

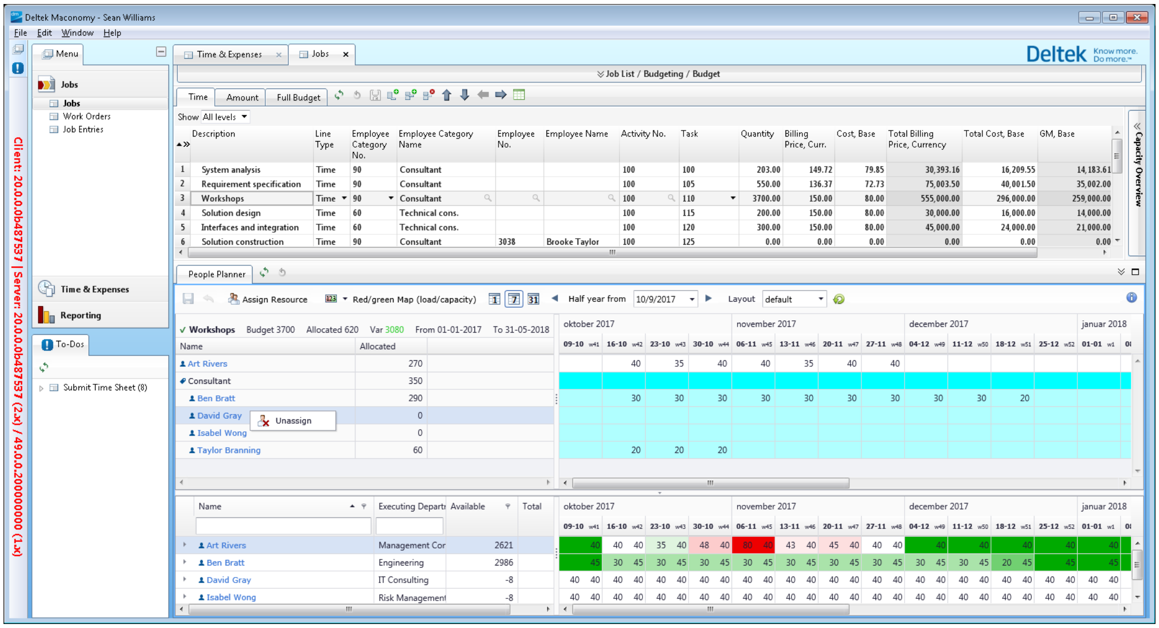
   The Resource Overview or Resource Management is redisplayed, showing the task reassigned to the resource whom you chose. Any bookings for the selected task are moved to the resource whom you selected for the specified period.

Unassign a Resource

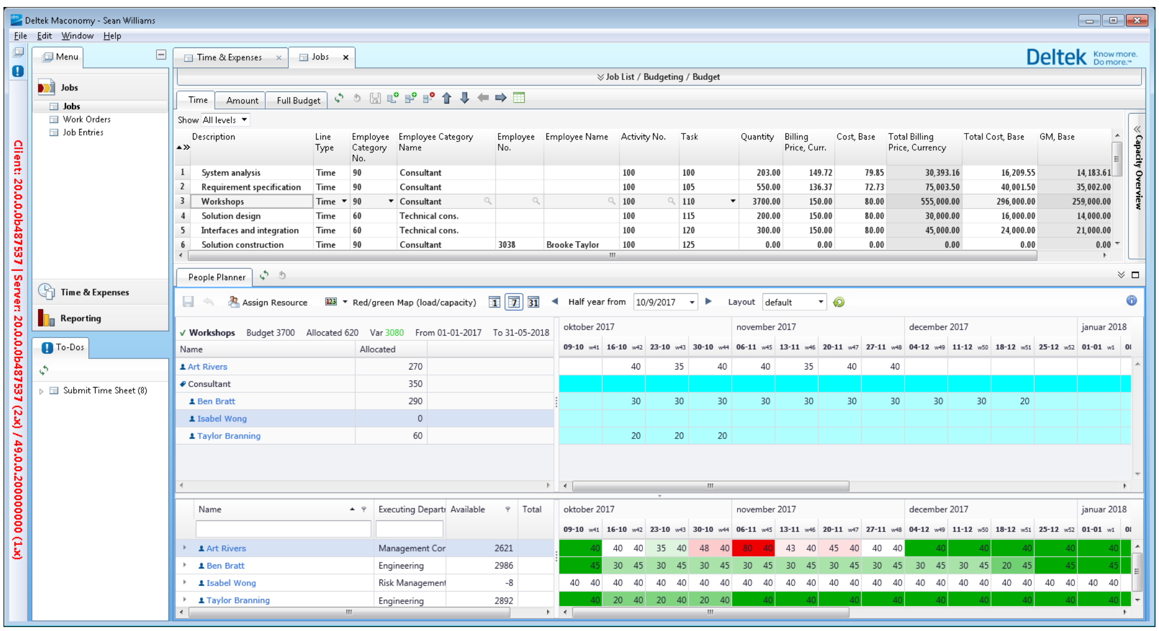
You can also remove assignments using the Unassign shortcut menu option. You can do this from an assignment (in the top half of the assistant) or from a task (in the bottom half of the window).

To unassign a resource from a task:

1. Select the budget line in the top half of the assistant.
2. Select the assignment and right-click on it.



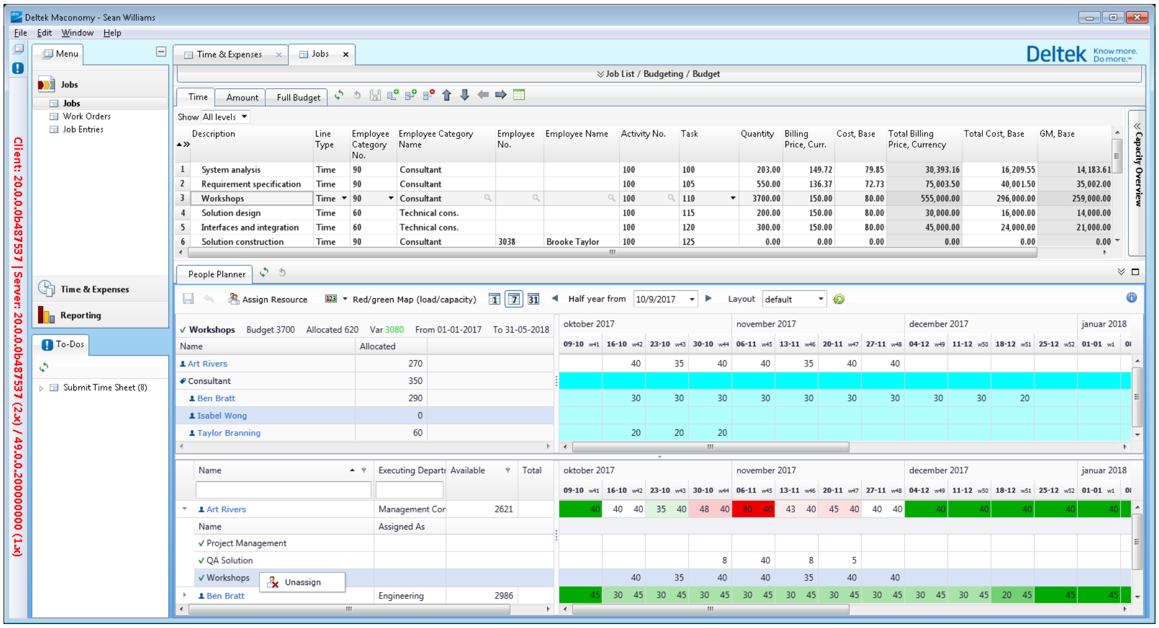
3. Select **Unassign** from the shortcut menu.



Note: When you unassign a resource category, any sub-assignments on it are also removed.

To unassign a resource from a task:

1. Select the resource in the bottom half of the assistant.
2. Expand the resource to display the tasks to which that resource is assigned.
3. Select the task and right-click on it.



4. Select **Unassign** from the shortcut menu.

Filtering Assignments

You can identify assignments that meet your requirements using the All Assignments filter in the toolbar of any assistant. You can choose from the following criteria to identify the needed assignments:

- All Assignments
- Assigned in Visible Period
- Booked in Visible Period
- Booked or New in Visible Period
- Custom Assignment Filter

You can define custom criteria to find assignments that meet other requirements. For example, you might want to display only assignments of a specific company.

Display Assignments Based on Specific Criteria

To display specific assignments:

1. Click the All Assignments icon in the toolbar.
2. Select one of the appropriate predefined options, or choose **Custom Assignment Filter** to define your own criteria.

   If you choose **Custom Assignment Filter**, a dialog is displayed where you can set the following criteria:

Field	Options
Logical Operator	▪ And ▪ Or ▪ Not And ▪ Not Or ▪ Add Group ▪ Add Condition ▪ Remove
	Click this icon to add a column. You can add one or multiple columns to the filter criteria. **Note:** Column options depend on the available columns in the PG or RG. Calculated columns such as Actuals After date, Actuals To date, Allocated After date, and Allocated Amount After date are not included in the options.
Operator	Select a filter option to refine your search on the column. For example, if you want to display assignments that begin with the letter T, select **Begins With**. **Note:** Available operation options depend on the column(s) you selected.
Input Value	Enter a value that corresponds with the selected operator. For example, if you want to display assignments that contain the word Analysis, select the **Contains** operator and type “Analysis” as the input value.

3. If the criteria satisfies your requirements, click **OK** to display the filtered assignments. Alternately, you can click **Clear** to remove all selections.

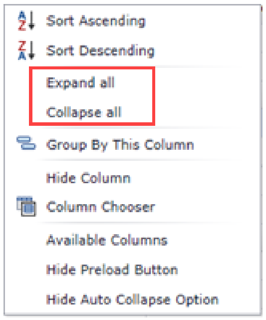
The label of the assignment filter drop-down changes to indicate the criteria that you applied, such as *Assigned in Visible Period*. If you specified a custom filter, it displays *Custom Assignment Filter*. The **!** (filter in use indicator) is displayed in the toolbar. When no filter is in use, the assignment filter drop-down displays *All Assigments.*

Hide the Categories Tab in Assign Resource

Whether to display or hide the Categories tab in the Assign Resource dialog is controlled by a setting in the Admin Tool. Your People Planner Administrator assigns the default state of this setting for your system. If this setting is selected, the Categories tab and the category part of the text at the bottom of the dialog are hidden in the Assign Resource dialog and the Reassign Resource dialog. You cannot choose to display the Categories tab during a session.

Expand / Collapse All Assignments

You can use the Expand all and Collapse all options on the column shortcut menu for data grids to expand or collapse all assignment lines for all tasks/resources on the currently loaded page.



If you choose Expand all, all of the tasks on the currently loaded page are expanded, and all corresponding assignment lines are displayed. If you navigate to another page of assignments, items on that page are not expanded, even if you used Expand all on the previous page. However, if you navigate back to the previous page, the tasks on that page remain expanded.

In the PG grid, both Expand all and Collapse all are available. Neither Expand all nor Collapse all is available if you are using column grouping.

> **Tip:** In the PG, while tasks are being expanded or collapsed, a loading symbol may be displayed, because these can be time-consuming.

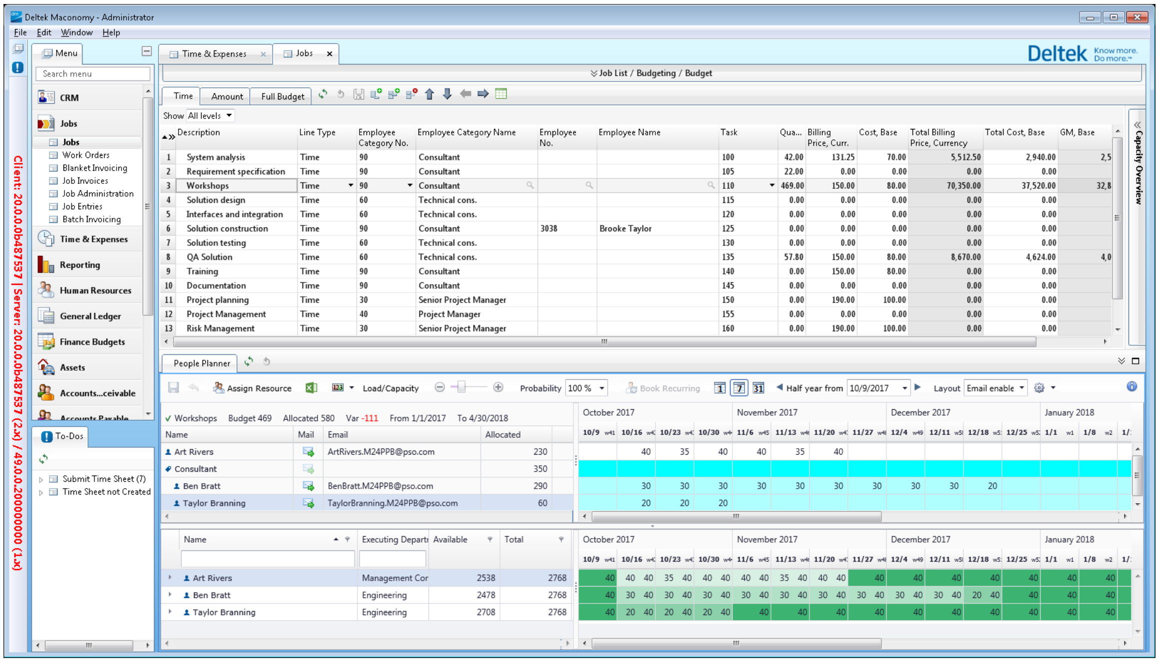
In the RG grid, these commands are not available if you use column grouping; otherwise, they are both available. Expanding or collapsing all assignments may be a time-consuming process; a loading symbol may be displayed. (The time that this takes depends on the RG page size that is configured in the Admin Tool and the number of assignments that each resource on the page has.) If you navigate to another page of assignments, items on that page are not expanded, even if you used Expand all on the previous page. However, if you navigate back to the previous page, the tasks on that page remain expanded.

Email a Resource

The names of some of the resources in the preceding figures are hyperlinks.

If a resource has an email address in the People Planner database, his or her name can be displayed as a hyperlink. When you click that hyperlink, your email client opens a blank email, pre-addressed to that resource. You can then compose and send the email.

As an alternative to the hyperlink, you can add the Mail-column. When you click the  button, your email client opens a blank email, pre-addressed to that resource—the same behavior as the resource name hyperlink.



You can disable the hyperlink on resource names by deselecting the **Use Resource name as e-mail Hyperlink** setting in the Admin Tool at **Settings » System Settings » Web Component Settings » General**.

As a best practice Deltek recommends that you use the email button option because this prevents accidental triggering of an email, which can happen when resource names are set up as hyperlinks. The **Use Resource name as e-mail Hyperlink** setting is selected by default.

You can add the Mail column to all grids where a resource name is a hyperlink, such as in Resource Management, Assignment sub-grids, the Assign Resource dialog box, and so on. The Mail button column is included in the list of available columns and is saved (when present) as part of a Web Layout. However, this column does not appear in the Column Chooser by default.

You can also add the Email-column to see the email address itself.

Note: Adding the Mail and Email columns requires that your Administrator has added them as available columns in the web layout. See Specify Available Columns in the Column Chooser.

Filtering, Sorting, and Grouping in the Assignment Sub-Grids

This functionality works in the same way in assignment sub-grids as it does in the main grids. See Filtering, Sorting, and Grouping by Columns.

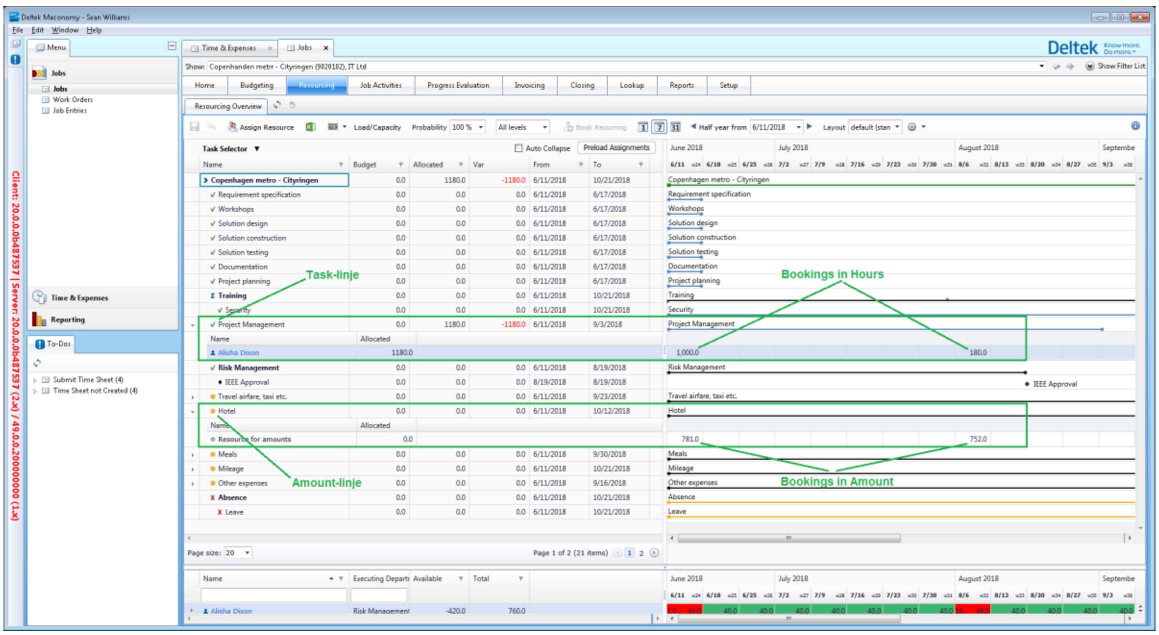
Bookings

The main purpose of the People Planner WSC Components is to assist Project Managers and Resource Managers with staffing the project and performing detailed planning by booking the resources for the number of hours that they are expected to work on it. Bookings are also called allocations.

Time and Amount Lines

Beginning with version 3.8.4, People Planner also supports amount lines.

The difference between amount lines and tasks is that the bookings on an amount line are considered an amount of something, usually a monetary amount.



The People Planner WSC Component displays hour and amount bookings in the same way, so you must look at the type of the budget line to know which one you are working with.

> **Note:** Release 3.8.4 added the setting **Number of decimals shown on amount values** in the Admin Tool at **Settings » System Settings » General UI**. This setting controls the number of decimal places that are displayed for amount values in the Web Components.

Restrictions on bookings on amount lines are that:

- You cannot use Book Recurring on an amount line.
- You cannot multi-cell-select both the booking cells of tasks and amount lines and then enter a number. This is because choosing both tasks and amount lines causes an ambiguity about whether the entered number is in hours or a monetary amount.

Book a Resource

Use these steps to allocate a resource to an assignment.

> **Note:** You cannot book resources on projects that are configured as read-only.

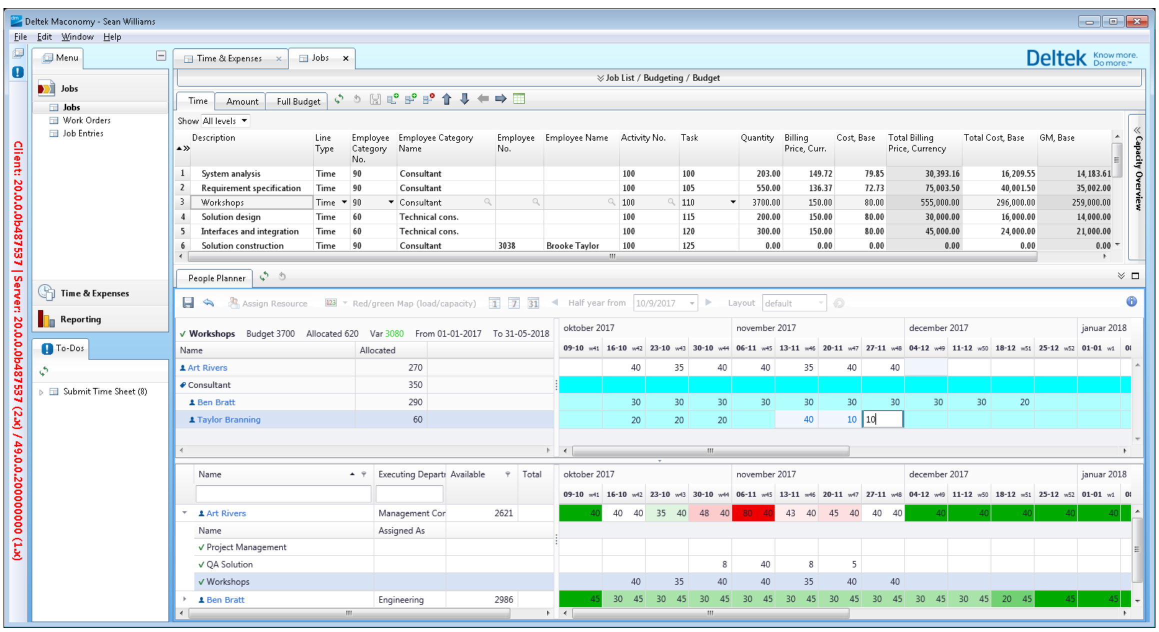
> **Note:** If the auto-save functionality is enabled, changes made in each cell are automatically saved after you enter a value. Additionally, the **Save** and **Undo** buttons are hidden in the toolbar.

To book a resource:

1. Select the budget line.
2. Select the assignment.
3. Select the cell that corresponds to the date for which you want to book the resource.

    > **Note:** You can only create bookings on resources, not on resource categories. This is indicated with a light blue color in the cells of the resource categories.

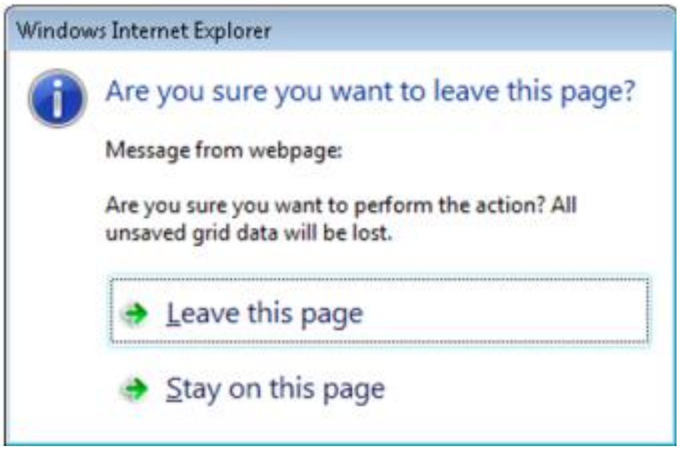
4. Enter the number of hours for which you want to book the resource.
5. Continue to select other cells and enter the appropriate hours. You can see the available capacity of the resource in bottom half of the assistant.



6. Click the **Save** button to finish.

If you have not yet saved the bookings, you can undo your edits by clicking the **Undo** button.

Note: If you forget to click the Save button and switch to a different budget line, you see a warning that you have unsaved bookings.

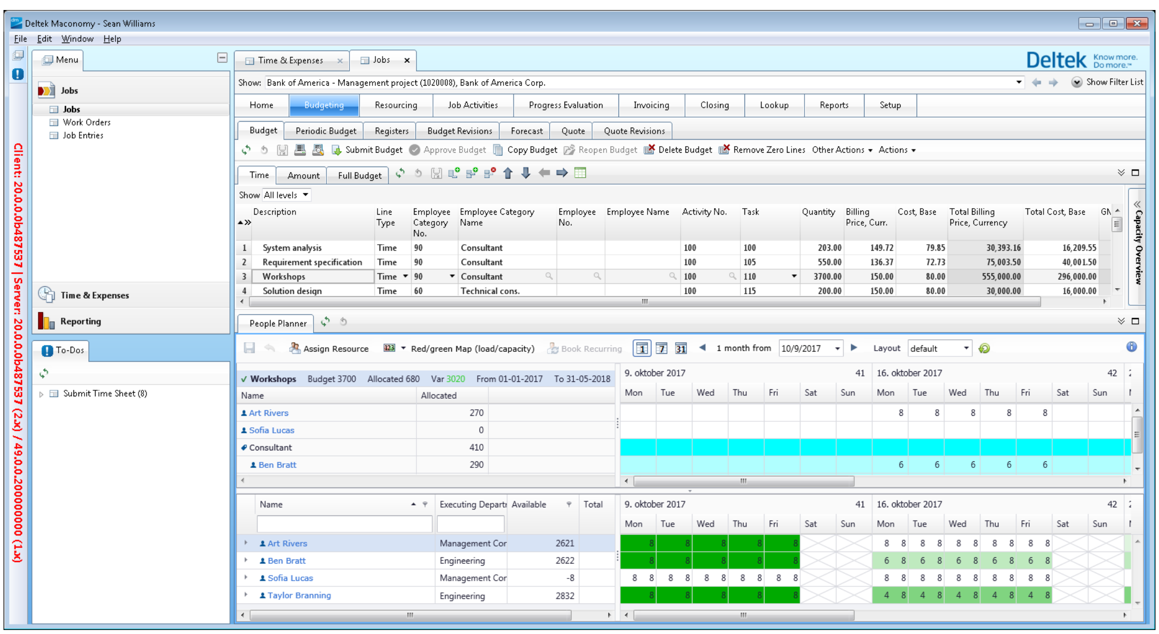


Book Recurring

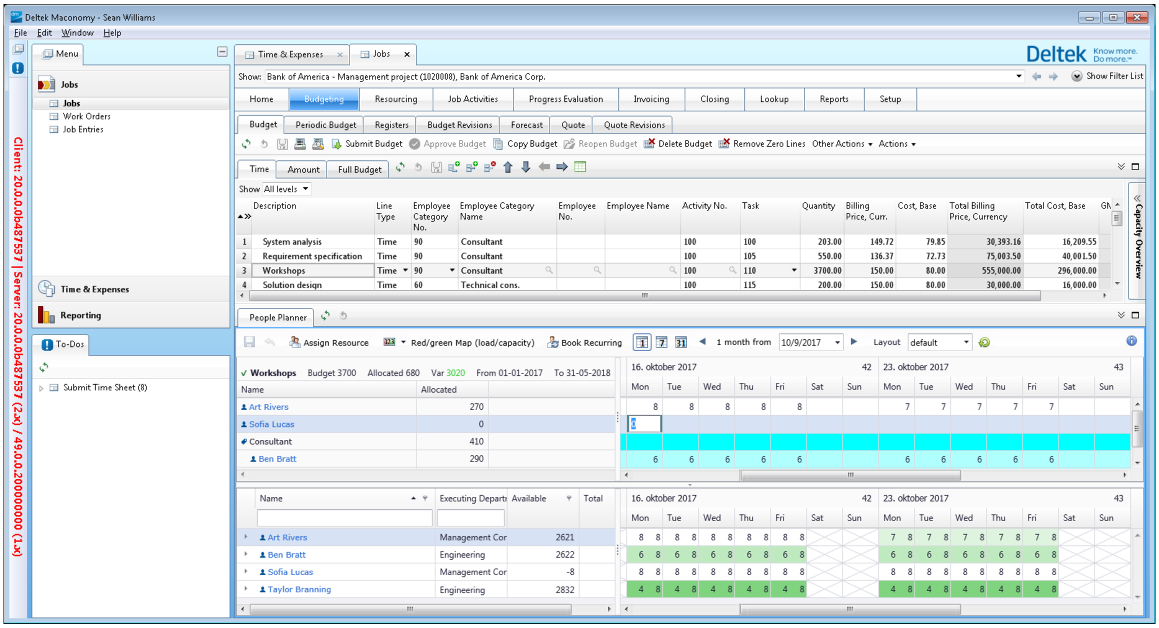
You can create recurring bookings, which are bookings that are repeated for a specified number of times or until a specified date.

To create a recurring booking on a budget line:

1. Select the budget line.
2. Select the **Day**, **Week**, or **Month** view. The following example shows the Day view.

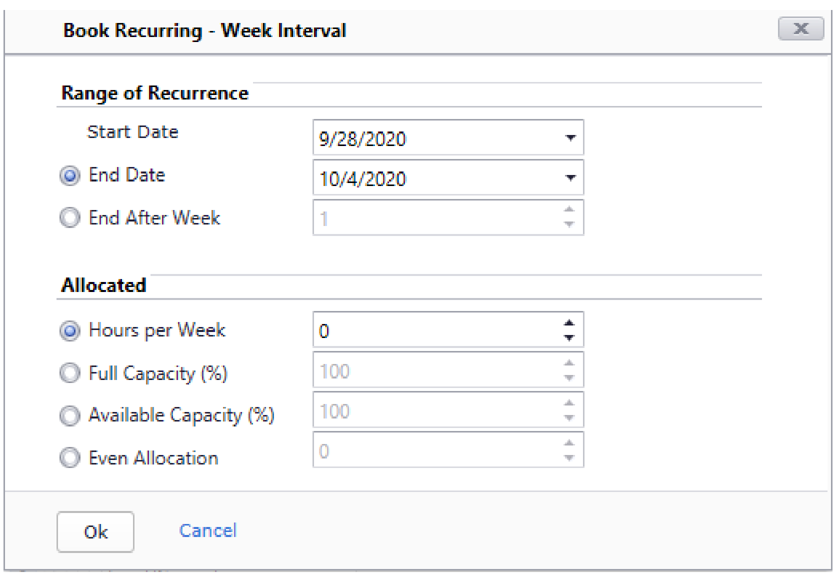


3. Select the cell that corresponds to the first date of the recurring booking.



4. Click the **Book Recurring** button. This opens the Book Recurring dialog.

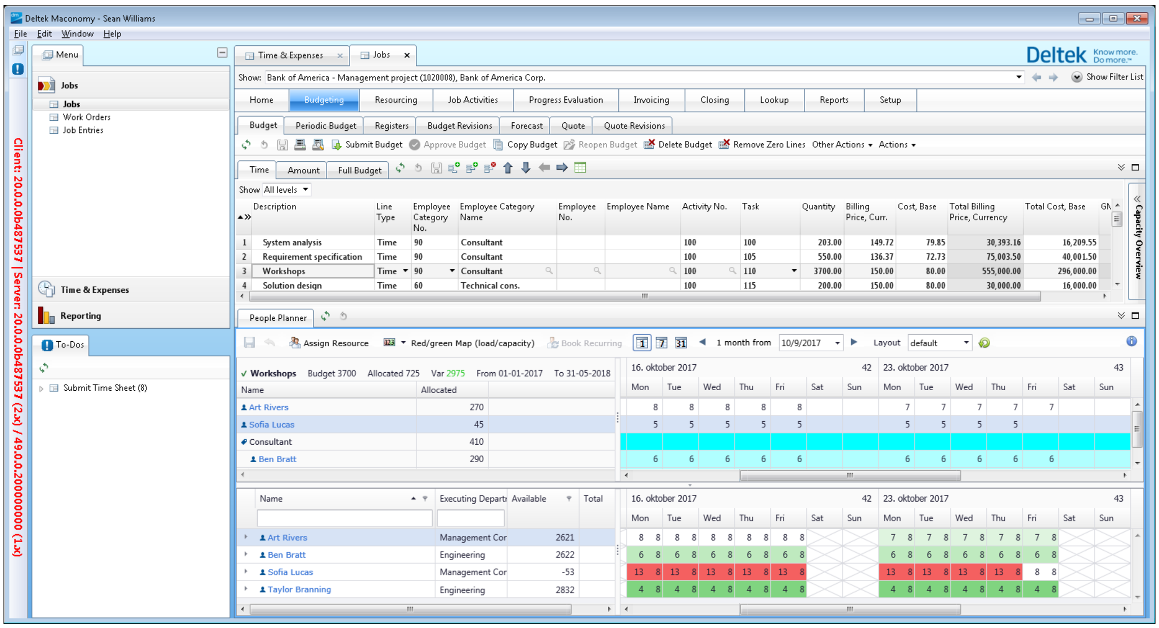
> **Note:** The Book Recurring button is only enabled when you select a booking cell. The selected cell is then used as the starting point of the recurring bookings.



For the **Range of Recurrence** fields, the default **Start Date** value is the first date of the selected cell. For the **Week** view, that is the Monday of the week, and for the **Month** view, that is the first of the month. The default **End Date** value is the Sunday of the week for the **Week** view, and the last day of the month for the **Month** view.

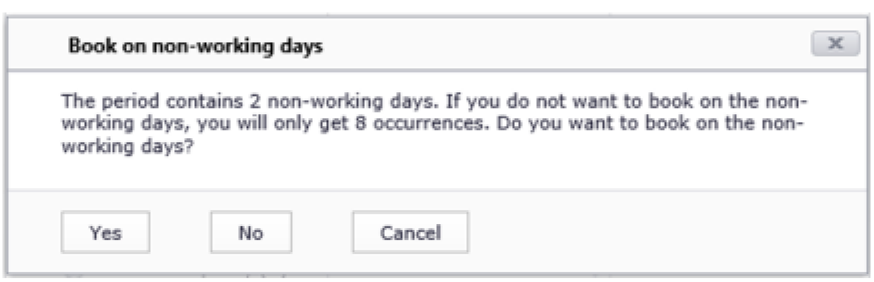
For the **Allocated** fields, the default end date is the task's end date if you have selected only a single cell If you have selected multiple cells, the default end date is the last of the selected cells.

5. Select the start date from the drop-down list for the **Start Date** field.
6. Do **one** of the following:
   - Select the **End Date** field and then choose a date from its drop-down list.
   - Select the **End After (Occurrences)** field and then choose the number of occurrences from its drop-down list to indicate how many bookings you want.
7. Select the **Hours per Day/Week/Month** field and enter the number of hours, or choose the number of hours for each booking from its drop-down list.
8. Click the **Ok** button to finish creating the recurring booking.



Tip: You do not need to click the **Save** button. The bookings are created automatically when you click **Ok**.

Depending on your selected end date, the time interval might overlap with one or more non-working days. If this is the case, you are asked how you want this to be handled.



You can click **Yes** to create bookings on the non-working day(s) or **No** if you do not want to create bookings on the non-working days. You can click **Cancel**, in which case you are returned to the Book Recurring dialog box.

As an alternative to specifying the exact number of hours, you can instead book the resource for a percentage of his or her full capacity or available capacity. The difference between full and available capacity is that the available capacity considers that the resource may already be booked on other tasks.

Multi-Cell Bookings

The assistants support the selection of multiple cells when creating bookings. For example, you can highlight the cells for four weeks and then enter booking hours on all of the selected cells at once, instead of entering the booking hours manually in each of the cells.

You can use the following methods to select multiple cells:

- **To select noncontiguous cells**

  Click on the first cell, hold the Ctrl key down, click on the next cell(s) that you want to select, and release the Ctrl key. The selected cells are highlighted. The last cell that you clicked on is in edit mode. When you enter a value in that last cell, all of the selected cells are given that same value.

- **To select contiguous cells**

  Click on the first cell, hold down the Shift key, click on the last cell in the sequence that you want to select, and release the Shift key. The first and last cells and all of the cells between them are highlighted. The last cell that you clicked on is in edit mode. When you enter a value in that last cell, all of the selected cells are given that same value.

Available Capacity

When you assign a resource to a task, it is important to know whether the resource has available capacity for the task.

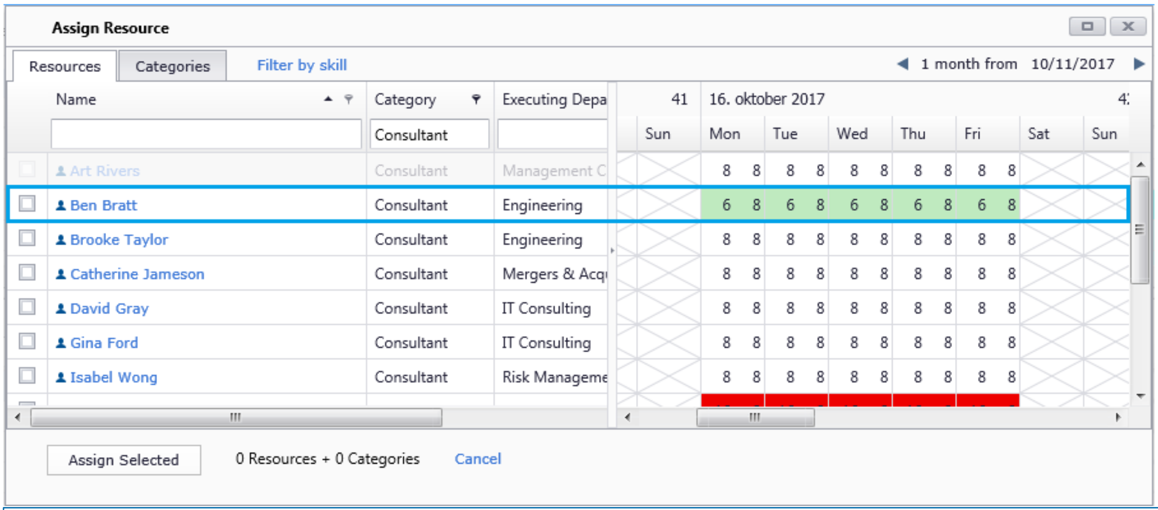
In People Planner, a resource is associated with up to three different calendars.

Calendar	Description
Work Week Hours	This describes the typical work week, for example, 8 hours on work days, and 0 hours on Saturday and Sunday.
Common Calendar	This describes national holidays and other company-wide days off.
Resource Calendar	This is an individual calendar for each resource. This calendar is unique for the resource, and it can be used for absences.

From the combination of these calendars, People Planner calculates the **Capacity** of the resource. When a resource has already been booked on other tasks, these hours are subtracted from the capacity to determine the **Available Capacity**.

> **Note:** The load is calculated across all of the tasks on which the resource has been booked. This includes bookings on projects other than the current one.

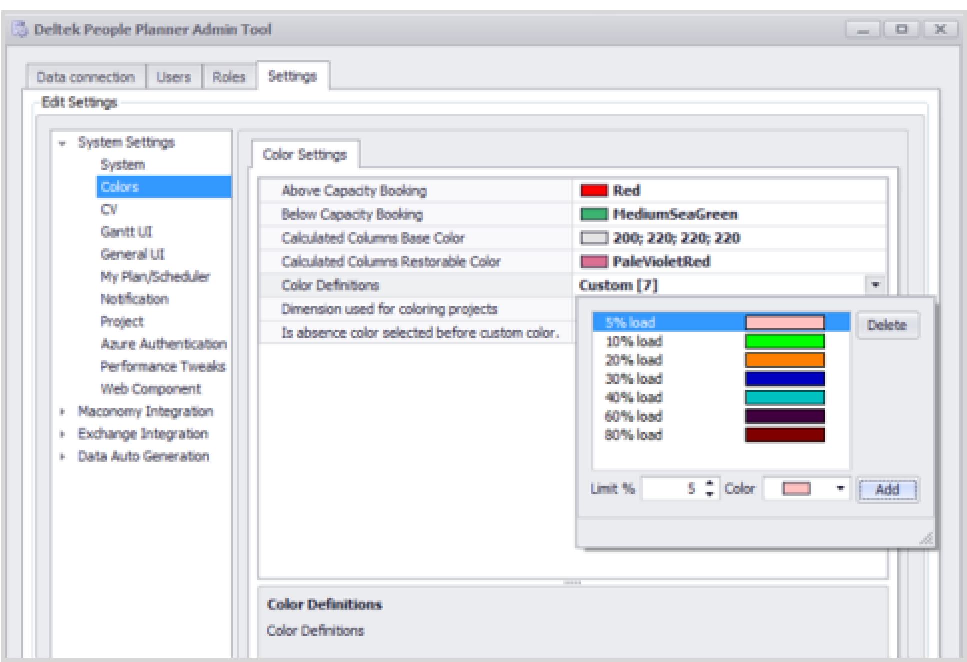
When you are assigning resources to a task, the Assign Resource dialog box shows you both how much each resource is currently booked for—that is, the load—as well as the total capacity of the resource. In the following figure, Ben Bret is booked for 6 hours each day, and he has a total capacity of 8 hours.



Note: The Assign Resource dialog box shows days, weeks, or months, depending on which view the assistant was using when you clicked the **Assign Resource** button.

Using the default colors, green means that the resource has available capacity, and red means that the resource is overbooked. The color becomes less intense the closer the resource is to being fully booked. A cell that is marked out with an X indicates that the resource has no capacity; for example, that day might be a weekend day.

You can change this default color coding if you have access to the People Planner Admin Tool. Under **Settings » Edit Settings » System Settings » Colors**, you can assign specific colors to indicate loads of 5%, 10%, 20%, 30 %, 40%, 60%, and 80%. The following figure shows an example.



Find Available Resources Based on Capacity

To find available resources for a specific job specify any criteria such as location or skills, if appropriate. Then you can further refine the list of available resources to display only those resources who are available within the required period and who also meet your capacity requirements. You can choose from the following utilization criteria to identify available resources.

Resources in the visible period who are booked:

- Less than 25%
- More than 50%
- More than 100%

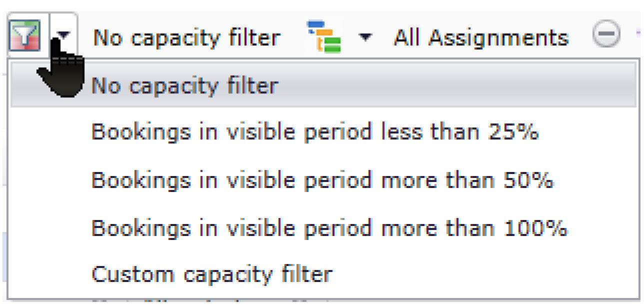
If none of these predefined criteria is appropriate for the job, you can define custom criteria to identify resources whose bookings or availability meet other requirements. For example, you might want to display only those resources who have at least 20 hours available in this month.

You use the capacity filter drop-down in the toolbar to define these criteria.

Display Available Resources According to Capacity Requirements

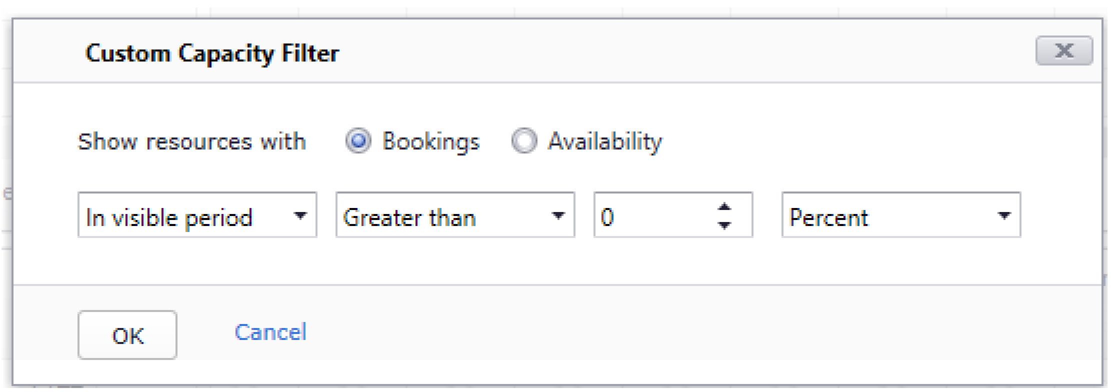
To display resources who are available according to specific capacity requirements:

1. In the Resource Management workspace or the Assign Resources window, specify any criteria for the resource that you need for the job, such as location.
2. Right-click the (capacity filter) drop-down in the toolbar. The capacity filter options are displayed.



3. Choose one of the appropriate predefined options or choose **Custom capacity filter** to define your own criteria.

   If you choose **Custom capacity filter**, the following dialog is displayed.



You can set the following criteria.

Field	Options
Period	▪ In visible period ▪ This week ▪ This month ▪ This year
Operator	▪ Greater than ▪ Less than
Amount	Enter the target percentage or number of hours or use the arrows to select it.
Unit	▪ Percent ▪ Hours

4. Click **OK**.

   The grid displays the resources who meet the specified criteria, based on resource bookings and capacity.

   The label of the capacity filter drop-down changes to indicate the criteria that you applied, such as *Bookings in visible period less than 25%*. If you specified a custom filter, it displays *Custom capacity filter*. The **!** (filter in use indicator) is displayed in the toolbar. When no filter is in use, the capacity filter drop-down displays *No capacity filter*.

Tip: Any selected capacity filter is saved as part of the toolbars in Web layouts. See Manage Shared Web Layouts — Administrator Tasks for information about Web layouts.

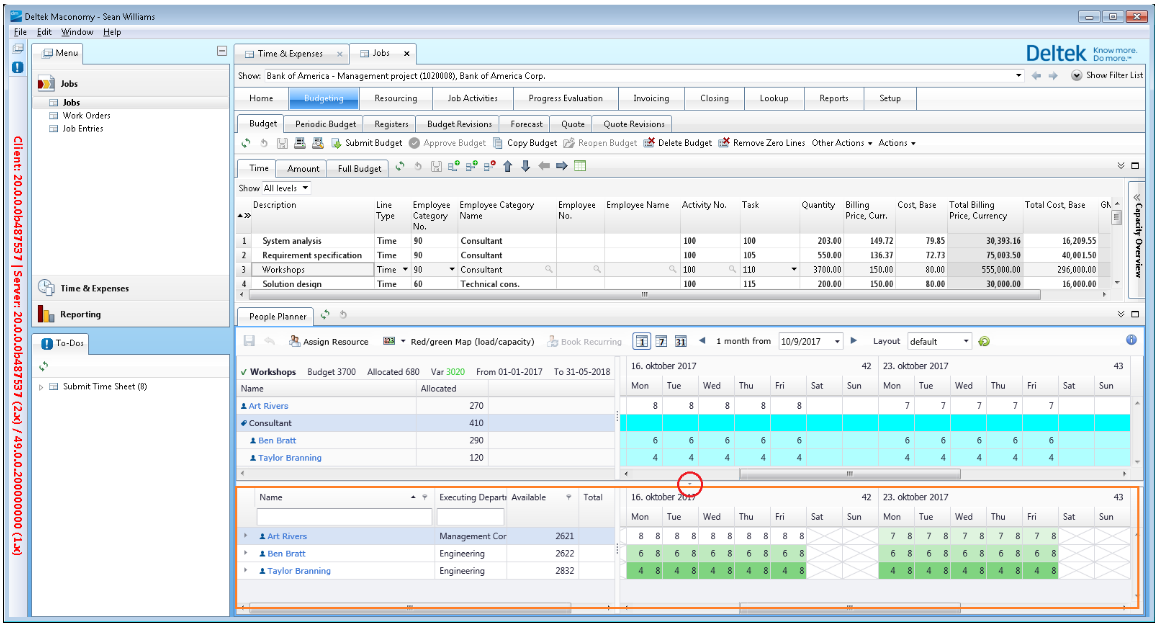
Booked Resources Outside Employment Period

You cannot book resources outside an employee's employment period. However, there may be cases where a booking was entered before the employee resigned, and this is retained in the system.

Beginning with version 3.9.2, bookings outside a resource's employment period are color coded red. This helps draw the attention of the project manager to reassign the task to a different resource. You can delete bookings outside the employment period of a resource. However, you cannot not edit them to modify the hours, or to create new bookings.

Load/Capacity Overview

The Assign Resource dialog box is not the only place where you can see the load and capacity numbers; the Budgeting Assistant, the Progress Evaluation Assistant, and the Resourcing Overview also display the load and capacity in the lower half of the window.



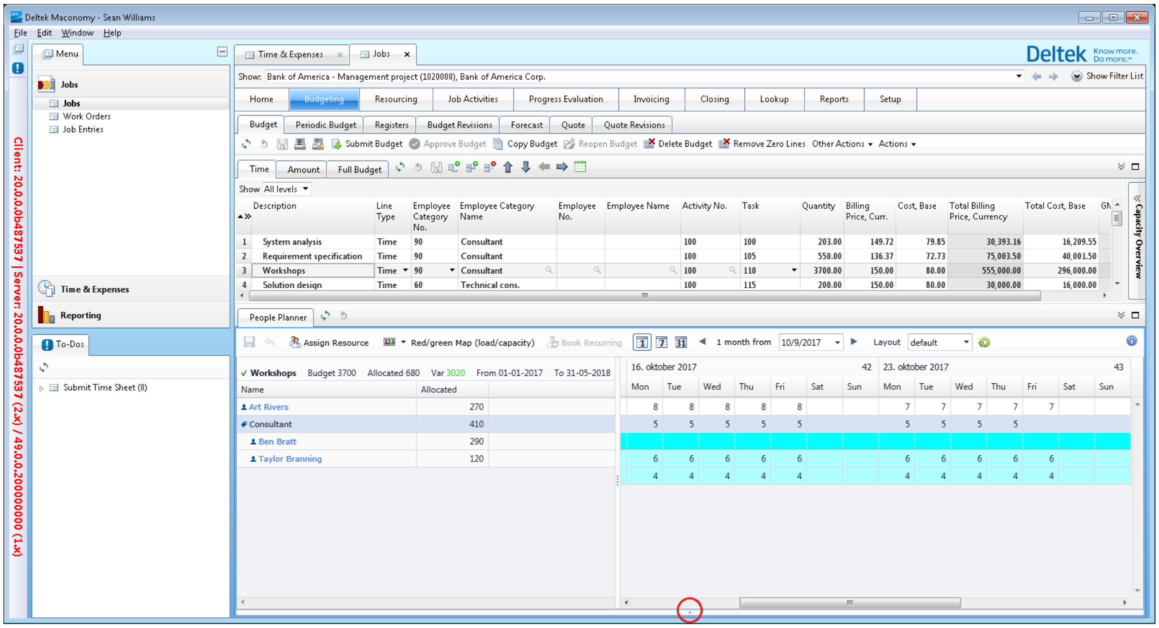
This overview displays the load of the resources who have been assigned to the task. The load is calculated across all of the tasks that the resource has been booked on, including bookings on projects other than the current one.

> **Note:** This part of the assistants is sometimes referred to as the **Resources Gantt Chart** or **RG**. The People Planner Windows Application has its own Resources Gantt Chart, and the similarity between that and this one is clear.

You can expand a resource to view the individual tasks that he or she is assigned to. This enables you to view the load—that is, the booking—on each task. Capacity is only displayed at the resource (not the task) level.

If you require more space to view the assignments in the upper half, you can collapse the Load/Capacity Overview by clicking the small down arrow button between the two sections.

You can expand the Load/Capacity Overview again by clicking the button a second time.



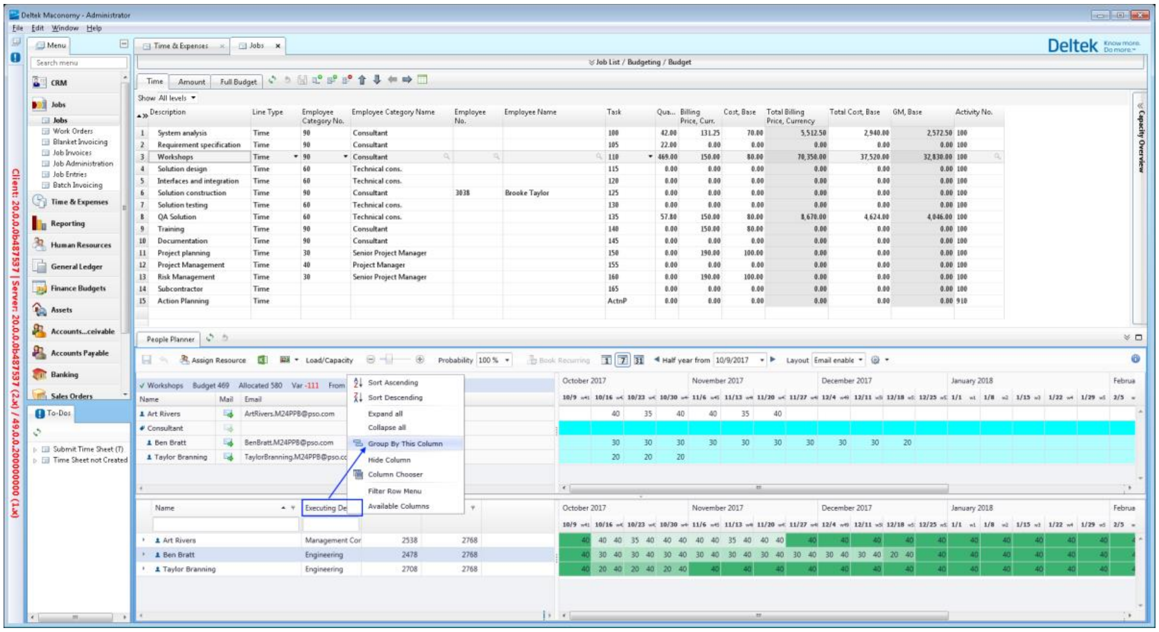
Group on Columns

You can group the rows on the values in one or more columns. For example, if you group on the Executing Department column, each group will consist of the resources from the same Executing Department. When grouping the rows like this, the numbers from each row are summed up on the grouped line.

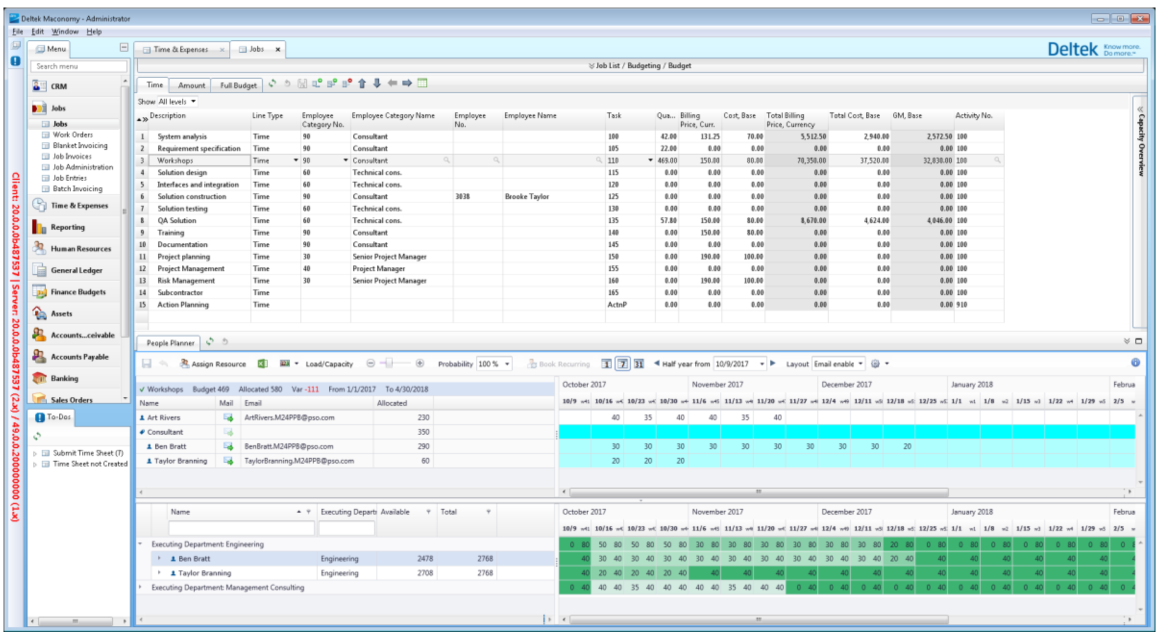
Group on a Column

To group on a column:

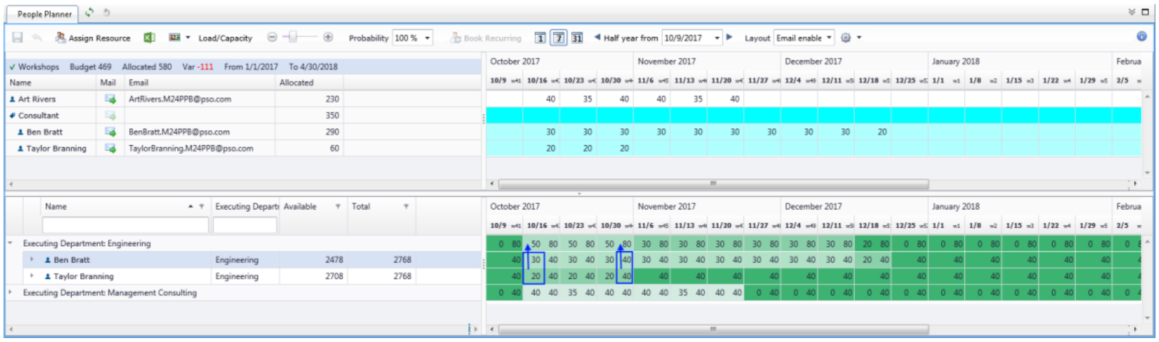
1. Right-click on the header of the column. This opens up a shortcut menu.
2. Select the **Group By This Column** menu item.



The rows are now grouped on the column. You can expand each group by clicking on the small arrow-button in front of the group.



When the rows are grouped like this, the numbers are totaled for each group.



You can group on multiple columns by selecting them and grouping them one by one.

Ungroup on a Column

To ungroup on a column again:

1. Right-click on the header of the column. This opens up a shortcut menu.
2. Select the **Ungroup** menu item.

Using Probability %

You can use People Planner to plan on opportunities, which are projects that have not yet been won (for example, as part of a bidding process).

To support this, the Probability drop-down helps you to evaluate the best- and worst-case scenarios, that is, where you might win all or lose all that are not 100% probable.

- **0%:** You lose all of the uncertain projects. You can disregard any planning on these projects, and the resources are free to work on other things. Bookings are thus set to zero hours when Probability is set to 0%.
- **100%:** You win all of the projects, no matter how uncertain. This is the default value. The bookings are the number of hours that you plan to spend. You can only edit bookings if Probability is set to 100%.
- **ERP:** You weight the hours with the probability. If you think it is 75% likely that you will win the project, you weight a booking of 100 hours as 75 hours. When you sum all of the weighted bookings over all of the projects, you hope that this provides a better estimate of the planned hours that you need as you win some opportunities and lose others.

The **Probability** field must have a value. When you choose 0% or ERP as the value for this field, the bookings area becomes read-only.

Note: The probability is imported from Maconomy.

You cannot change the actual probability using this control in the Web Components. This control changes only how bookings are displayed.

When you change the probability in the Budgeting Assistant, Progress Evaluation Assistant, and Resourcing Overview, bookings in both the (upper) main grid and the (lower) sub-assignment grid are adjusted accordingly.

See the *Deltek People Planner Fundamentals Guide* for more detailed information about assigning probability to a project.

Data Limitation

The Data Limitation drop-down option allows you to filter on existing Public Data Limitations and User Data Limitations.

In the drop-down, a divider line separates public data limitations from private data limitations. The default data limitation is the **No Data Limitation**.

When there are no data limitation defined in the Windows Application, the data limitation is set as **No Data Limitation** and the user data limitation toolbar button is disabled.

Select Data Limitation

Use the Data Limitation drop-down to filter the data that displays.

To select Data Limitation:

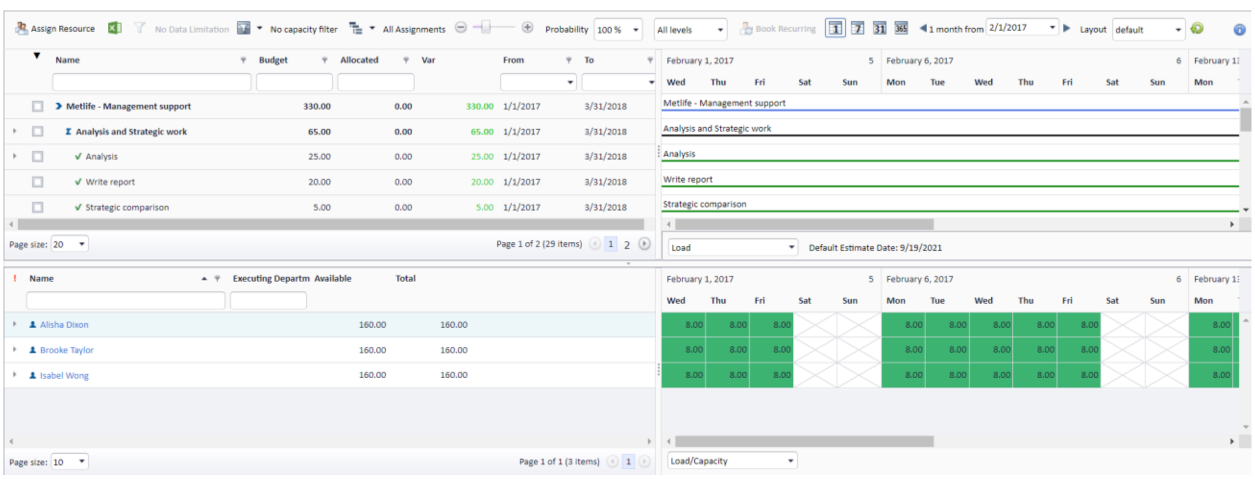
1. Navigate to the Web Components.
2. Select the needed data limitation by which you will filter.
3. Select the default **No Data Limitation** option to remove the filter applied (from the previous selected data limitation) in the grids of event, resource and assignment.
4. Save the web layout. The selected data limitation is saved also in that web layout.

Note: If the data limitation is deleted in the Windows Application and the data limitation is currently saved in the web layout, the data limitation is removed from the web layout when you try to load the web component, and the drop-down is set to the default **No Data Limitation**.

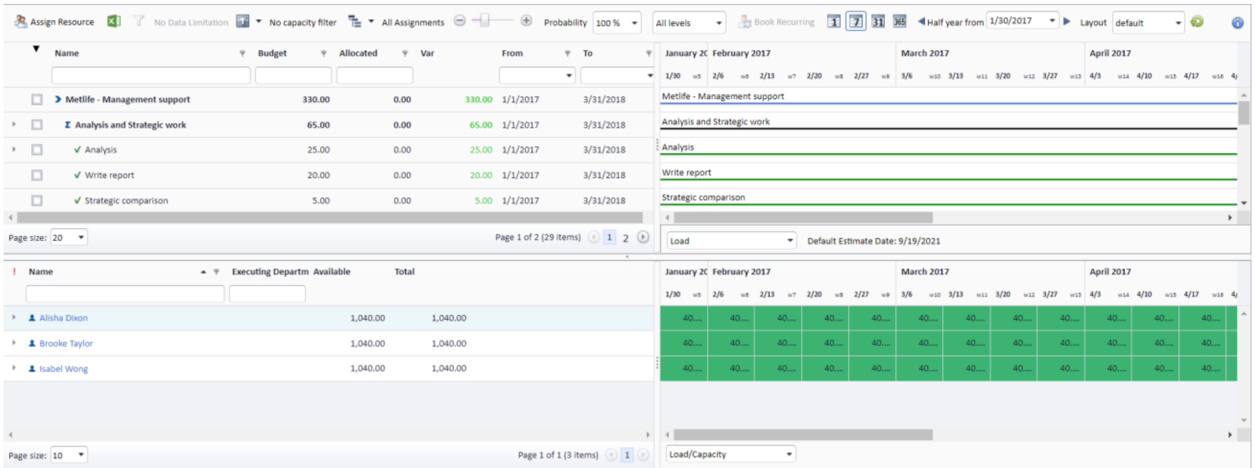
Views

You can view the bookings on four scales of granularity: Day, Week, Month, and Year. To switch between the views, you click one of the four view buttons: Day View, Week View, Month View, and Year View.

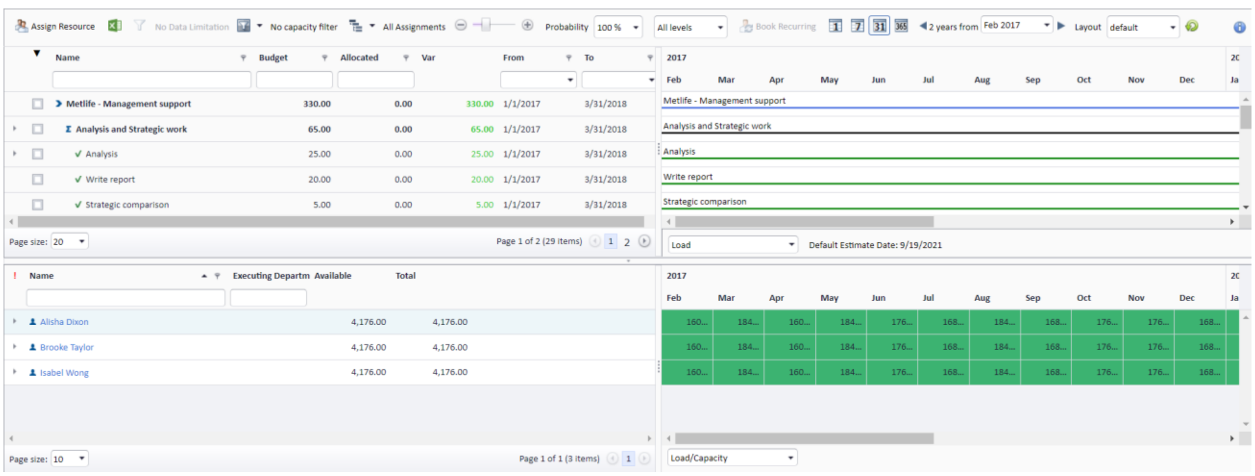
Day View



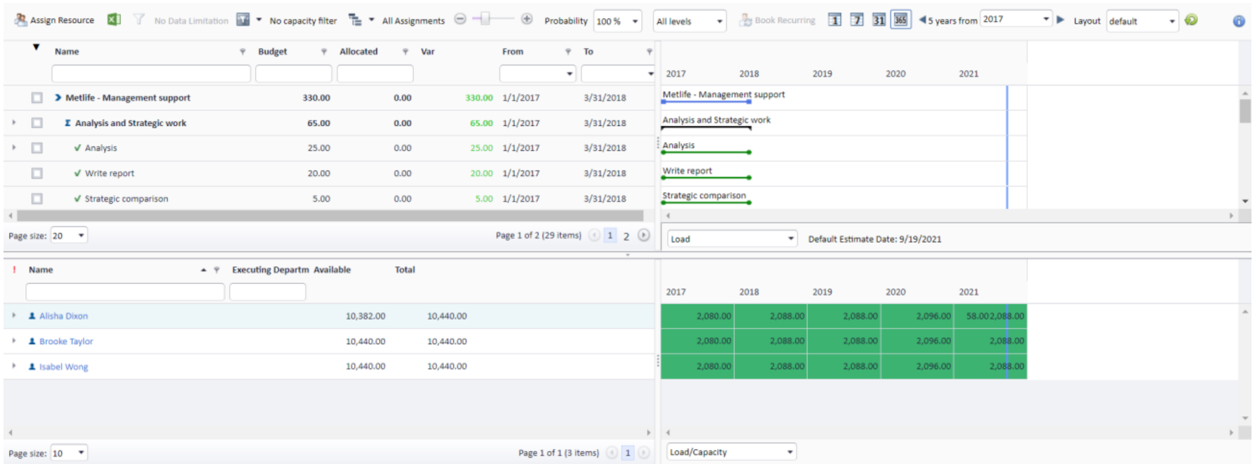
Week View



Month View



Year View



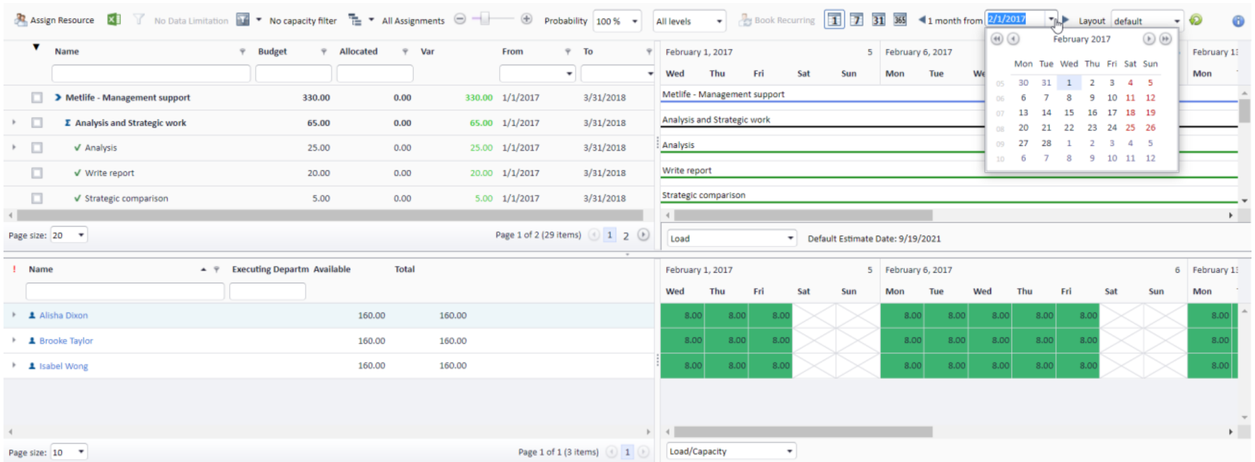
Visible Period

For performance reasons, the People Planner WSC Components only load the bookings for a limited period.

Granularity	Visible Period
Day view	1 month
Week view	2 quarters
Month view	2 years
Year view	5 years

Note: Using the People Planner Admin Tool, you can configure the length of the visible period.

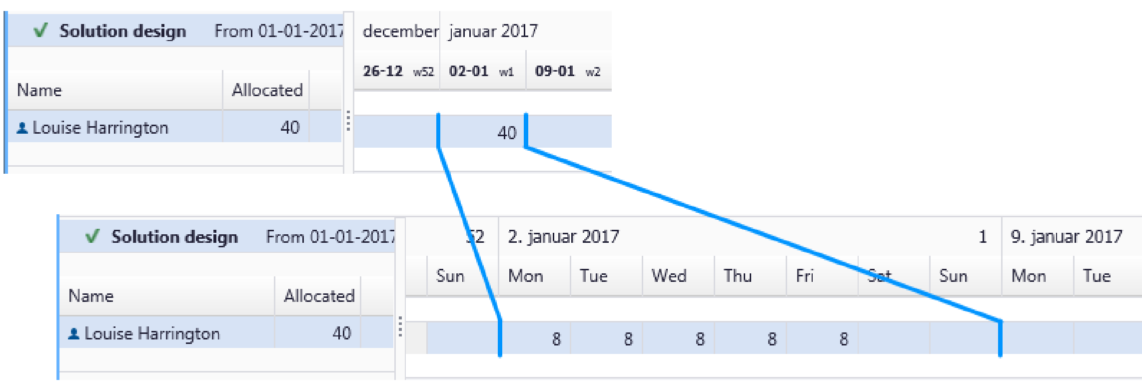
You can select a new start date for the visible period by using the date chooser just to the right of the four view buttons.



You can move to the next or previous visible period by clicking either of the two arrow buttons on each side of the date chooser.

You can create bookings while in any of the three views. If you later switch to a different view, People Planner displays the bookings adjusted to that view.

When you switch to a finer granularity—for example, from Week view to the Day View—People Planner displays the hours distributed per the capacity of the employee. For example, the weekends are shown with 0 hours.



Export to Excel

In displays such as the Resourcing Overview, the upper part provides the Project Managers Gantt (PG) chart, and the lower part provides the Resource Gantt (RG) chart.

You can export information from the PG and RG charts to an Excel file. The **Export to Excel** button is available in the toolbar in the following Web Components:

- Resourcing Overview
- Resource Management
- Budgeting
- Progress Evaluation

- Capacity Overview

When you click the **Export to Excel** button, it downloads and saves an Excel file locally. Depending on the location from which you clicked the **Export to Excel** button, the exported Excel file contains one or two worksheets:

- **PG:** Creates a worksheet that contains all task and assignment lines for the currently displayed project/task when you click the Export to Excel button. The Gantt chart part of this worksheet uses your selected view—Day, Week, or Month—and includes bookings for the loaded period. Any filtering and grouping that you have used in the data grid is reflected in the exported Excel spreadsheet.
- **RG:** Creates a worksheet that contains all resources and their assignments or the selected page size when you click the Export to Excel button. The Gantt chart part of this worksheet uses your selected view—Day, Week, or Month—and includes values for the selected Main Display View for the loaded period. Any filtering and grouping that you have used in the data grid is reflected in the exported Excel spreadsheet.
- **Resourcing Overview:** Creates two worksheets: one for the PG and one for the RG. However, if the RG is hidden, only the PG information is exported.
- **Resource Management and Capacity Overview:** Creates one worksheet, an RG sheet that includes all resources and assignments.
- **Budgeting and Progress Evaluation**: Creates two worksheets:
  - A PG worksheet that includes information for one task. This is because both Budgeting and Progress Evaluation show only one task line.
  - An RG worksheet that includes the resources associated with that one task.

Layouts

You can customize the appearance of the assistants, for example by adding columns, removing columns, rearranging columns, and resizing columns.

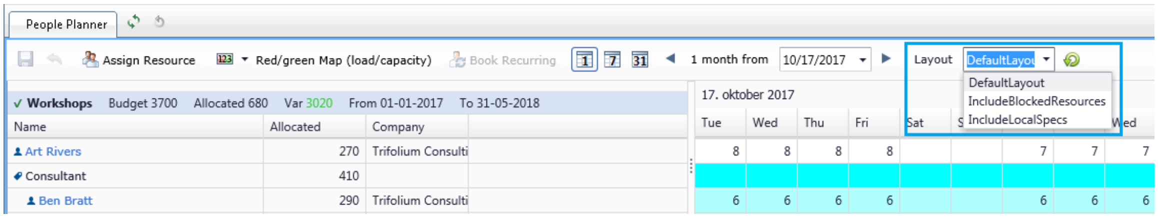
You can also group on the values of one or more columns, sort on the values of a column, or add a filter criterion that limits the data that you want to appear in the assistant.

You can then save your customizations as a layout.

The following types of layouts are used in the People Planner WSC Components:

- **Default (Standard) Layout:** The normal look and content of a grid-type display that is created automatically.
- **Shared Layout:** A layout that an administrator creates (based on a default layout) and makes available to other users. A shared layout can be made available to all users, or only to users who have a certain role.
- **Personal Layout:** A personalized version of a display. When you load a standard or shared layout, a personal version is automatically created; you can then modify it—for example, adding or removing columns, grouping rows based on the value of a column, and so on.

You can find a list of the layouts to which you have access by clicking the drop-down arrow for the Layout Selector. The following figure shows an example.



> **Note:** This menu is only available if you have more than a single layout to choose from.

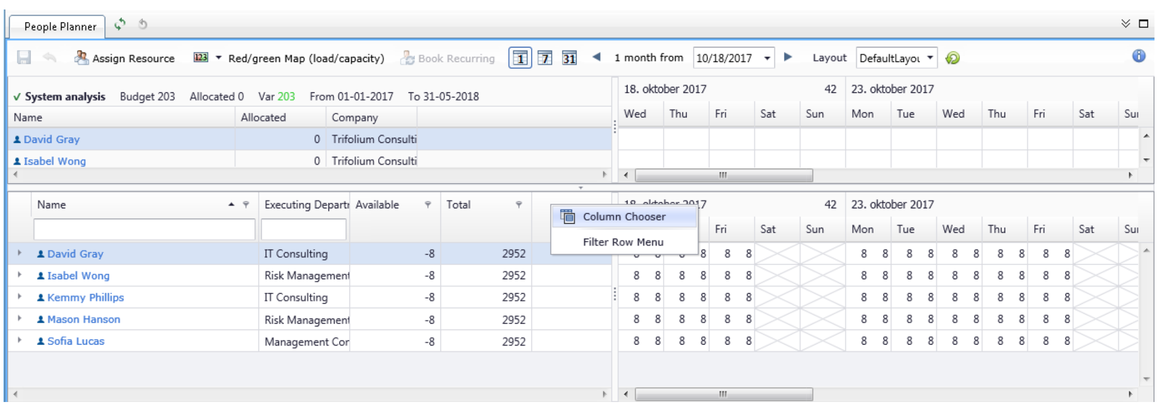
> **Note:** If you have the Edit Web Page Layout privilege—typically given to administrators—you can perform additional tasks related to layouts. See Manage Layouts — Administrator Tasks for more information.

Add Columns

Use the Column Chooser to select the columns that you want to see in a layout.

To add a column to a layout:

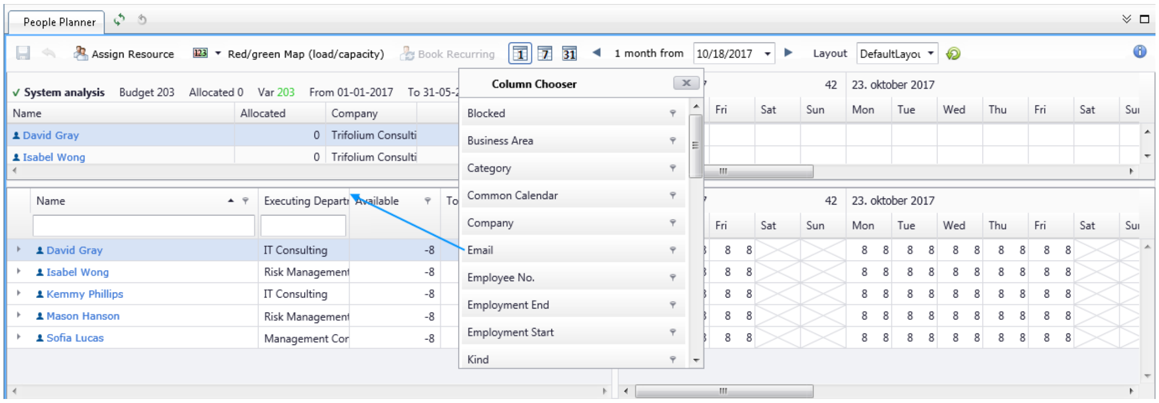
1. Navigate to the WSC Components display whose column layout you want to change and right-click in the column header.



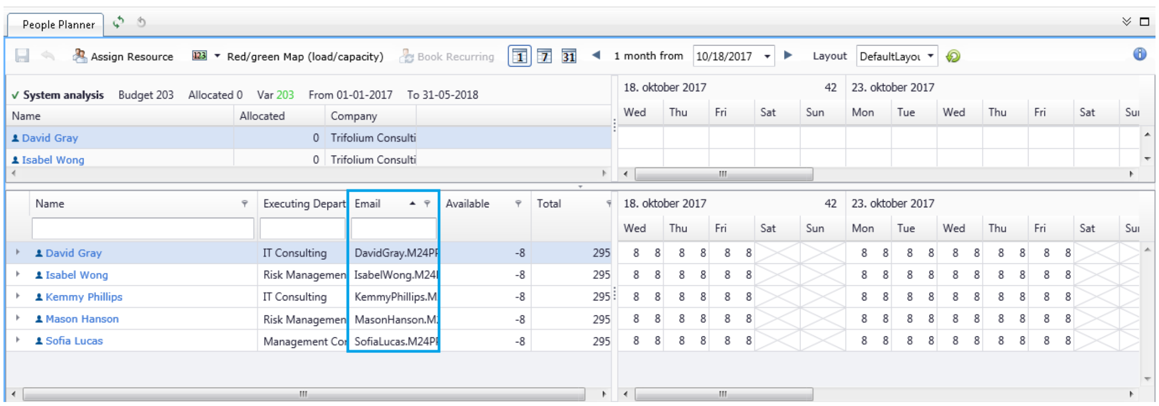
2. Choose **Column Chooser** from the shortcut menu.

   The Column Chooser is displayed; it lists the columns from which you can select. The following figure shows an example.

   > **Note:** By default, only a limited number of columns are available. In the following figure, the layout has been modified to include most of the available columns.



3. Drag the column that you want to add to the layout from the Column Chooser onto the heading and drop it into the position where you want it to appear.

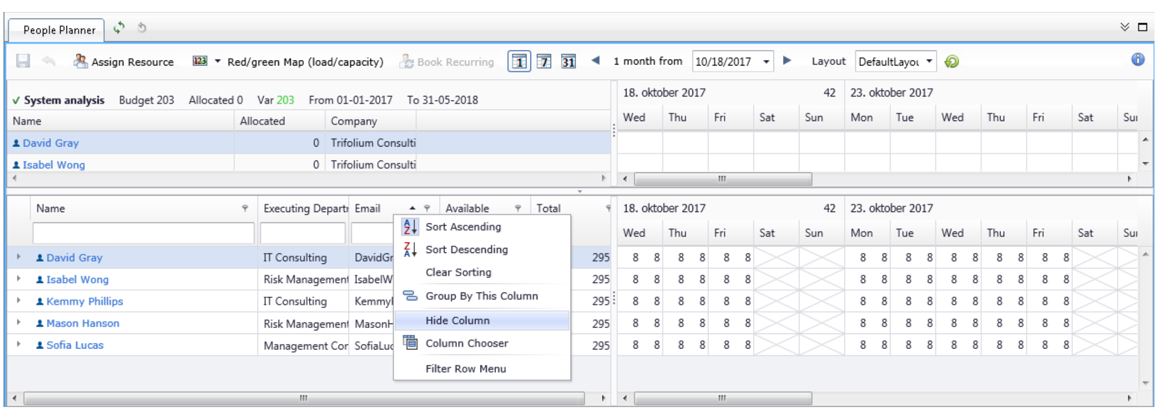


Remove Columns

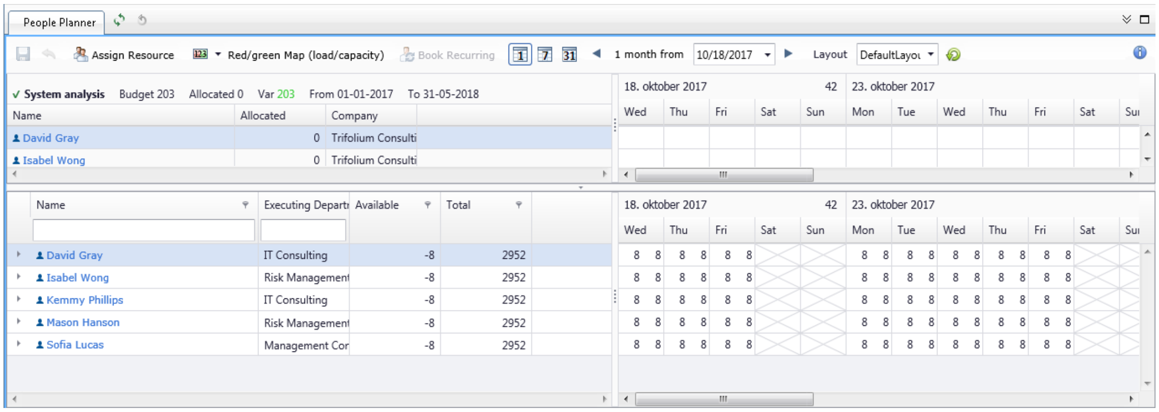
Use the Column Chooser shortcut menu to select the columns that you want to remove from a layout.

To remove a column:

1. Navigate to the WSC Components layout from which you want to remove a column.
2. Right-click on the column that you want to remove.



3. Choose **Hide Column** from the shortcut menu.



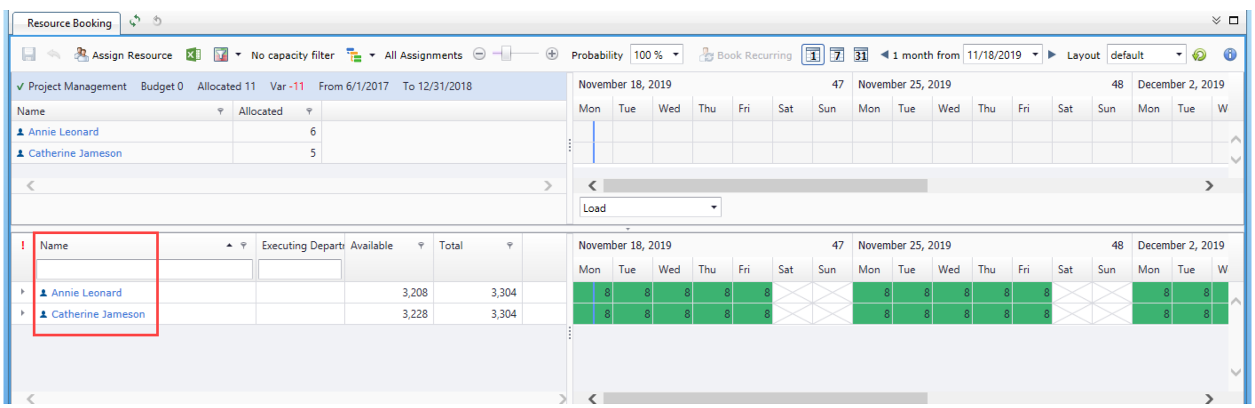
Resize Columns

To resize a column:

1. Navigate to the WSC Components layout whose column you want to resize.
2. Click the border at the edge of the column and drag it either left or right to resize the column.

Sort on Columns

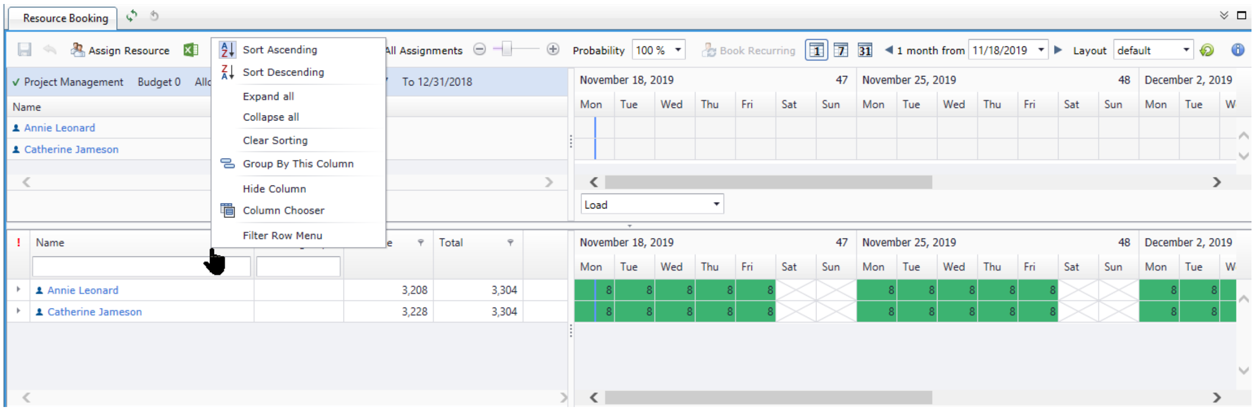
You can sort rows in a display grid based on the values in a column, in either ascending or descending order. The following figure shows the Capacity/Load Overview sorted in ascending order on the names of the resources.



Sort on a Column

To sort on a column:

1. Navigate to the WSC Components display in which you want to use sorting, such the example shown in the following figure.
2. Right-click on the column header of the column that you want to use as the sort criterion for the grid display.



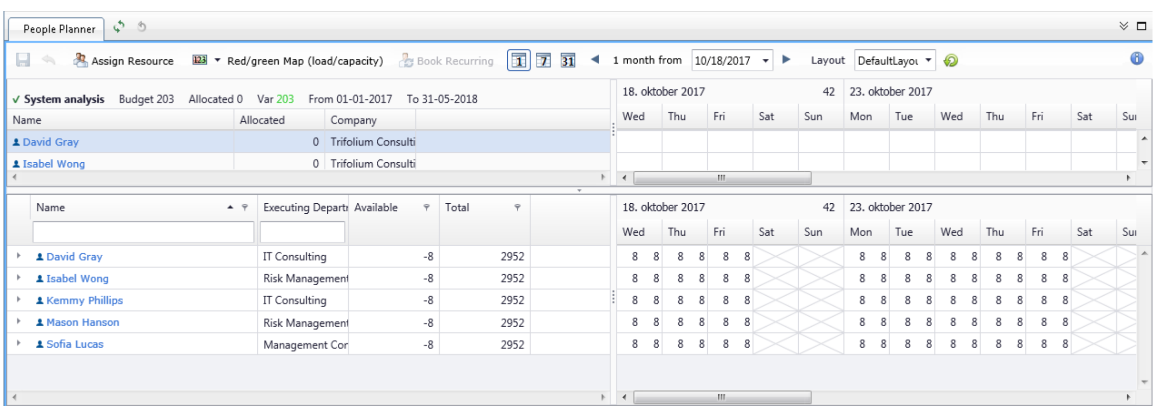
3. Choose either **Sort Ascending** or **Sort Descending**, as appropriate, from the shortcut menu.

> **Note:** Instead of using the shortcut menu, you can click on the small arrow button in the column heading.

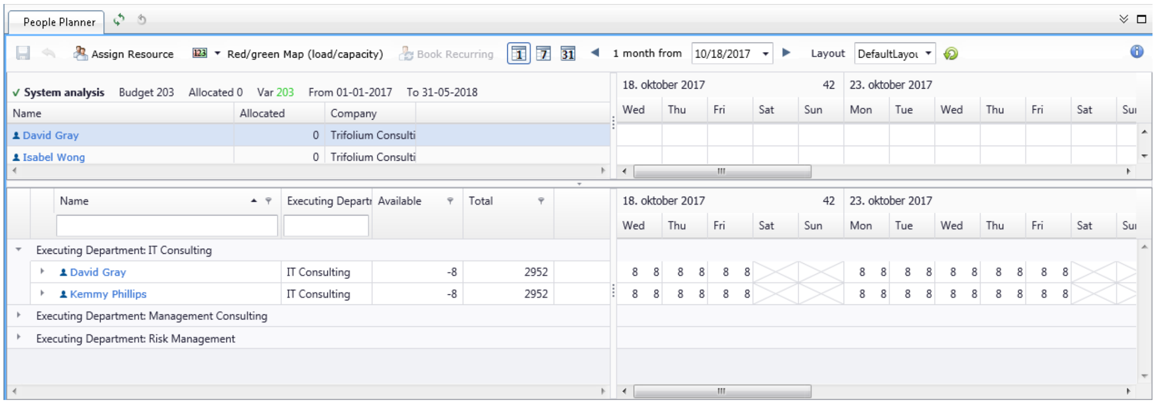
> **Tip:** You can choose **Clear Sorting** from the shortcut menu to remove all column sorting. Values in columns are then displayed randomly.

Group on Columns

You can group rows based on the values in a column. The following figure shows an example Capacity/Load Overview Resource Gantt chart.



For example, you can group these resource rows based on the values of the Executing Department column. The following figure shows how this example Resource Gantt chart looks using that grouping: resources who have no Executing Department values are grouped together; resources whose Executing Department is Engineering are grouped together; and resources whose Executing Department is Management Consulting are grouped together.

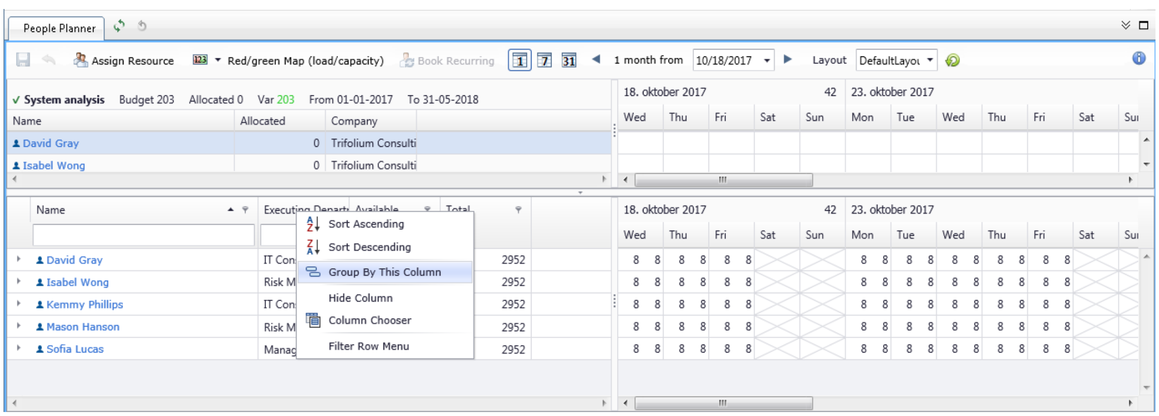


Tip: You can expand and collapse the groups to see the assignments. Click the small arrow button in front of the group name to toggle between expanded and collapsed.

Group Rows by Column Values

To group rows by the values in a column:

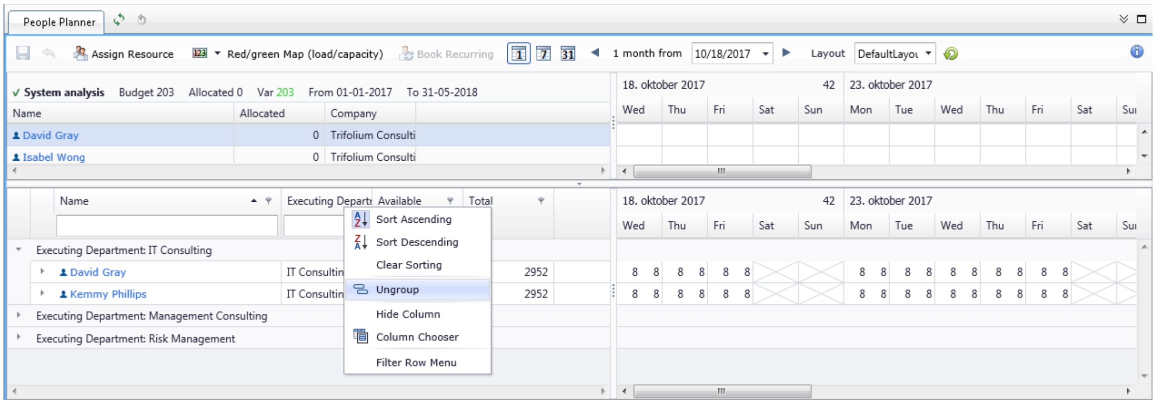
1. Navigate to the WSC Components display in which you want to use grouping.
2. Right-click on the column header of the column on which you want to perform the grouping.



3. Choose **Group By This Column** from the shortcut menu.

To remove grouping on a column:

1. Right-click on the column header of the column on which you want to remove a previous grouping.



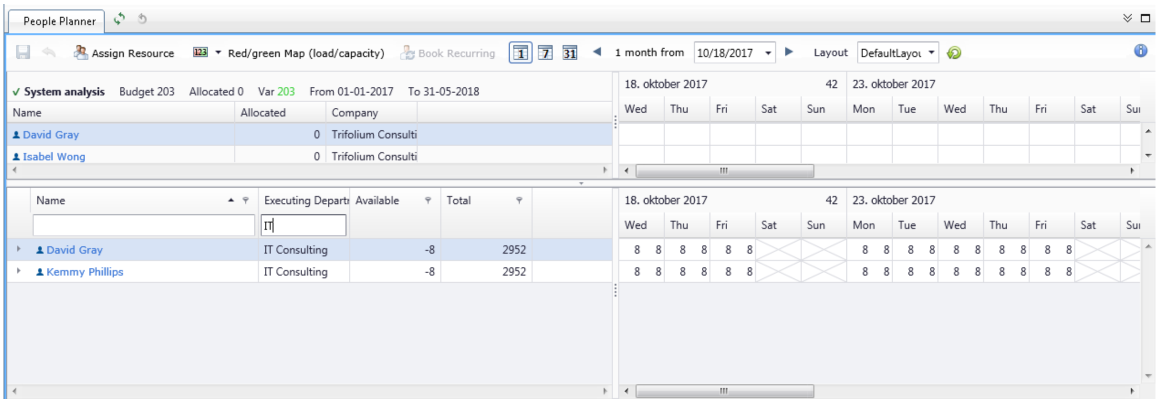
2. Choose **Ungroup** from the context-menu.

Filter on Columns

You can filter on a column to only see the rows that fulfil the filter criterion.

To filter on a column:

1. Select the filter field at the top of the column.



2. Enter your filter criteria.

Personal Layouts

When you have set up a WSC Components display in the way that you like, it is saved as your personal layout. You can personalize both a default (standard) layout and a shared layout that your administrator or manager has created and made available to you.

To personalize a layout:

1. Navigate to the layout that you want to personalize.
2. Set up the display exactly as you want it to look, following the steps in Add Columns, Remove Columns, Resize Columns, Sort on a Column, Group on Columns, and Filter on Columns.

The layout is automatically saved as your personal, customized copy of the shared layout. Each time that you access the page, it will use this layout. The original shared layout is not affected.

> **Tip:** If you change your mind about the changes that you made to the layout, use the **Restore Layout** button to restore your layout to its original state before you made your changes.

> **Note:** If you have the Edit Web Page Layout privilege—typically given to administrators—you can perform additional tasks related to layouts.

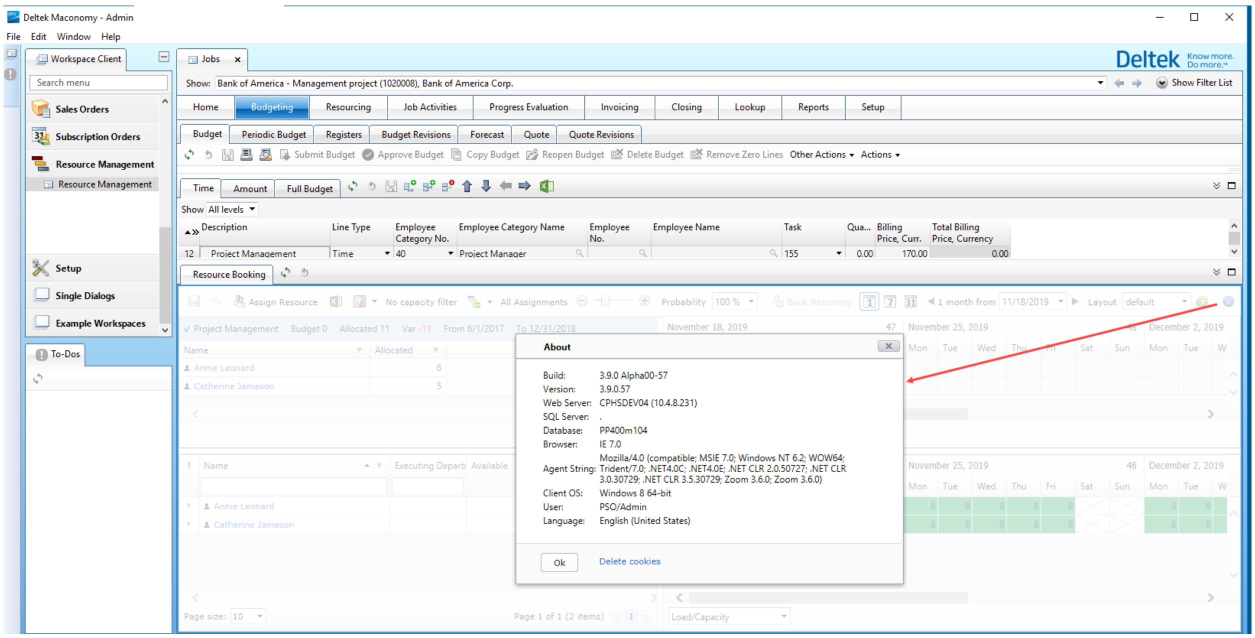
About Box

The About Box tells you about the version of the People Planner WSC Components, along with other important information about your system.

Open the About Box

To open the About box:

- Click the button in the upper-right corner of the assistant, as the following figure shows.



Note: You can click the Delete Cookies link in the About box. Cookies are used to remember the positions of splitters. In addition, if you are viewing bookings in day, week, or month view, deleting cookies resets that information. If your layout looks strange, deleting cookies can resolve it.

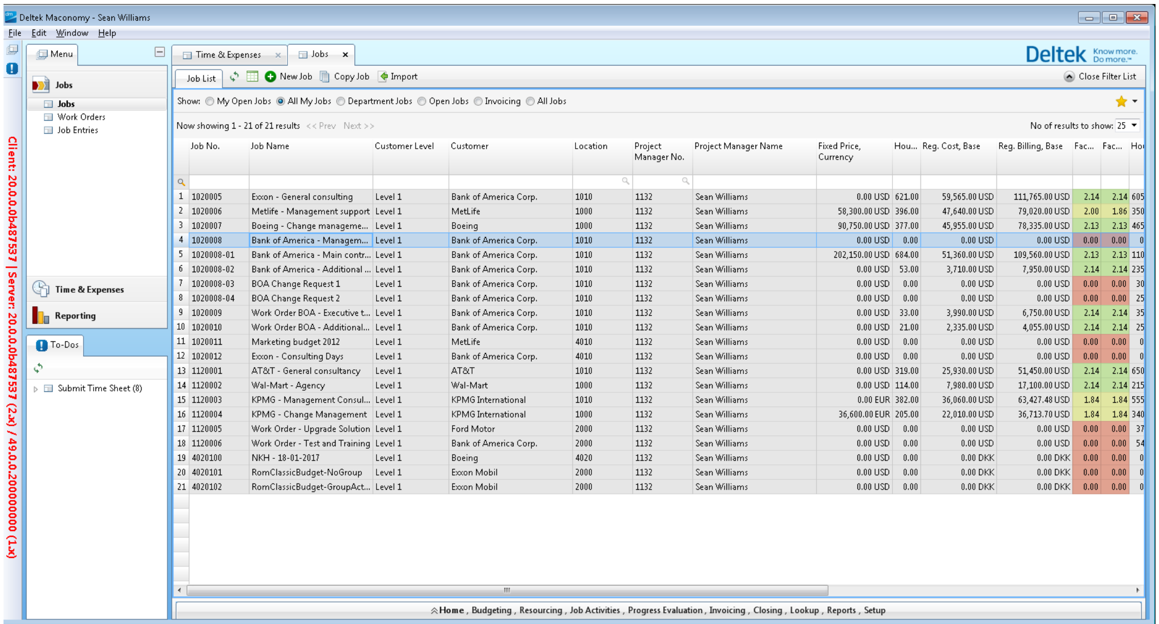
Budgeting Assistant

The People Planner Budgeting Assistant (BA) is embedded in the Jobs workspace under the Budgeting tab, under both the Budget and Periodic Budget sub-tabs. This assistant is otherwise identical for both cases.

Locate the Budgeting Assistant

To locate the Budgeting Assistant:

1. Navigate to the Jobs workspace via **Menu » Jobs » Jobs**.

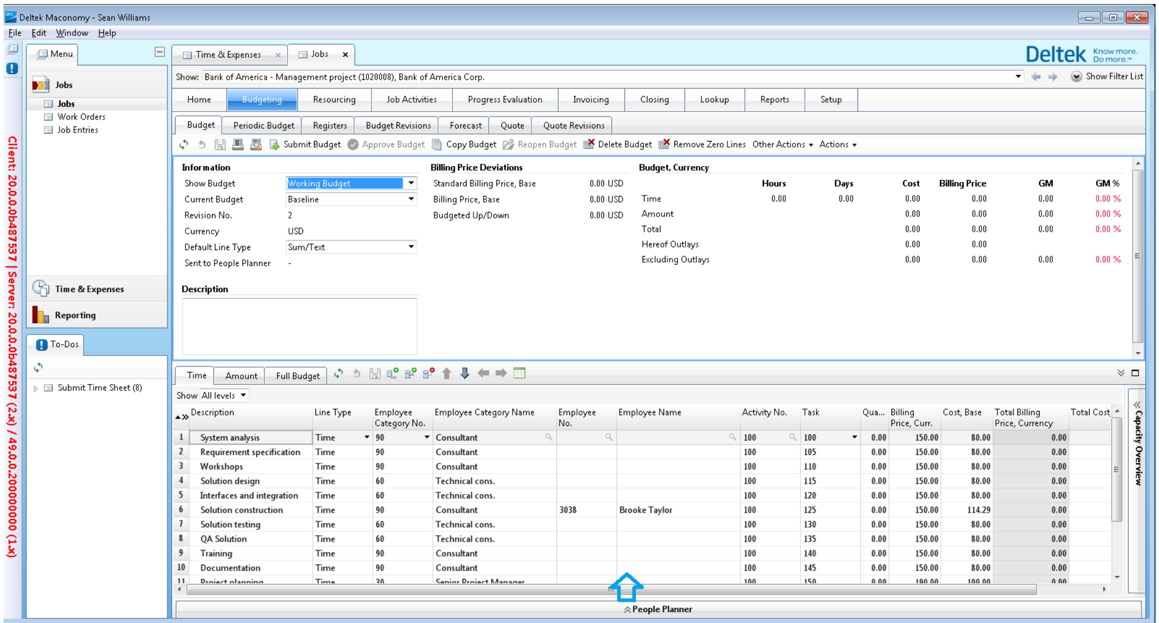


> **Note:** Some Maconomy systems have a second Jobs workspace at: **Menu » Single Dialogs » Job Cost » Creation » Jobs**. Despite the overlap of names, this is a different workspace, and the Budgeting Assistant is not accessible from there.

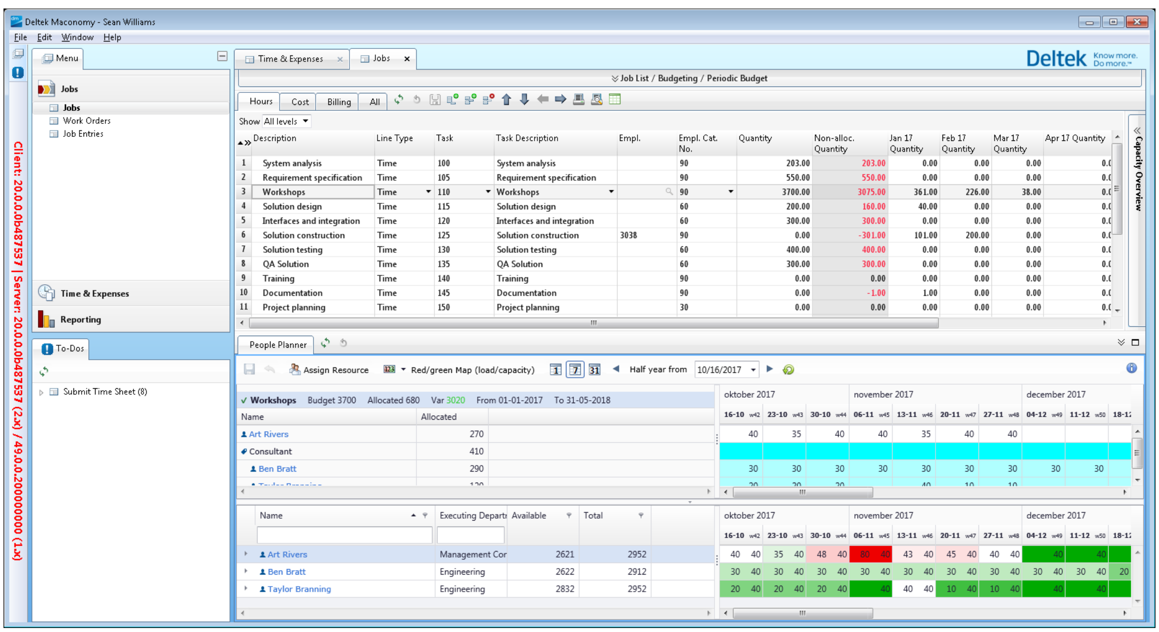
2. In the Job List, select the job that you want by double-clicking it.
3. Click the Budgeting tab.
4. Do one of the following:
   - Click the Budget sub-tab.
   - Click the Periodic Budget sub-tab.
5. Choose **Working Budget** from the drop-down list for the **Show Budget** field.

> **Note:** While the Maconomy Workspace Client (WSC) can show several budgets, it is only the Working Budget that is sent to People Planner.

6. Expand the Budgeting Assistant by clicking the double-arrow button at the bottom of the Jobs window (where it says **People Planner**).

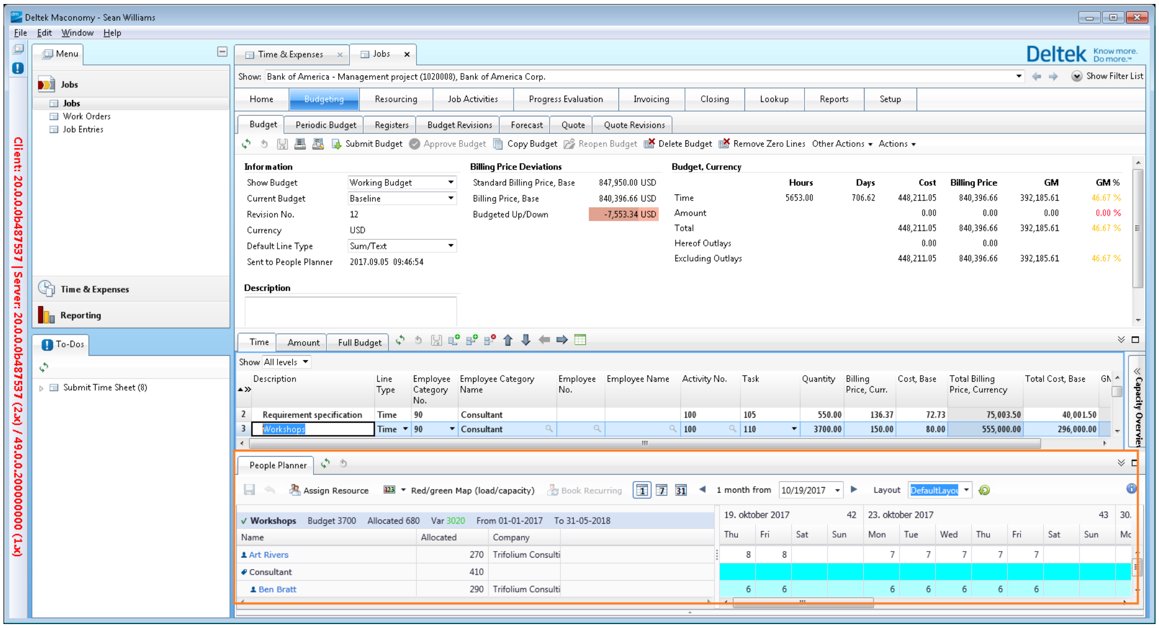


7. In the budget list, select the budget line that you want to work with.

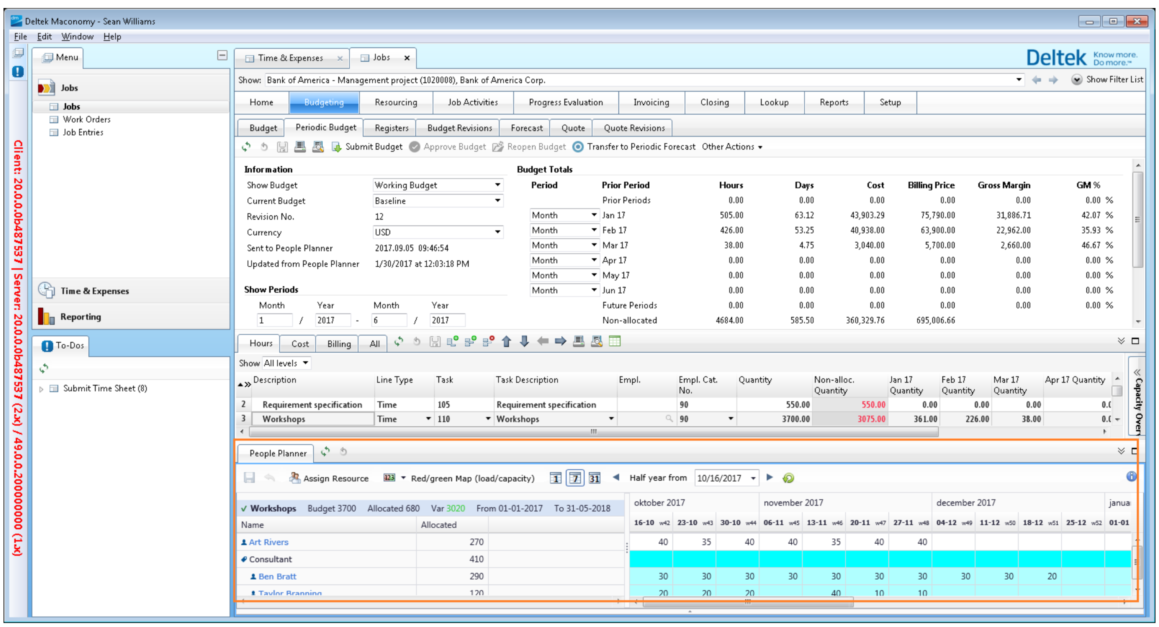


Each time that you select another budget line, the People Planner WSC Components are updated accordingly.

The Budget Tab

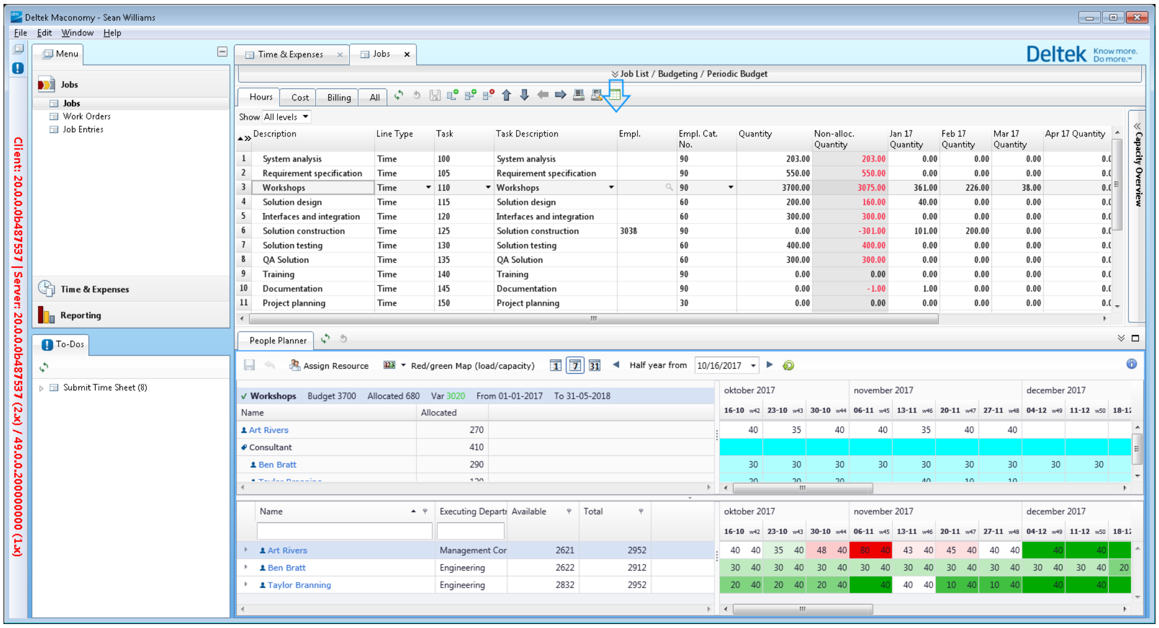


The Periodic Budget Tab



Resize the Budgeting Assistant

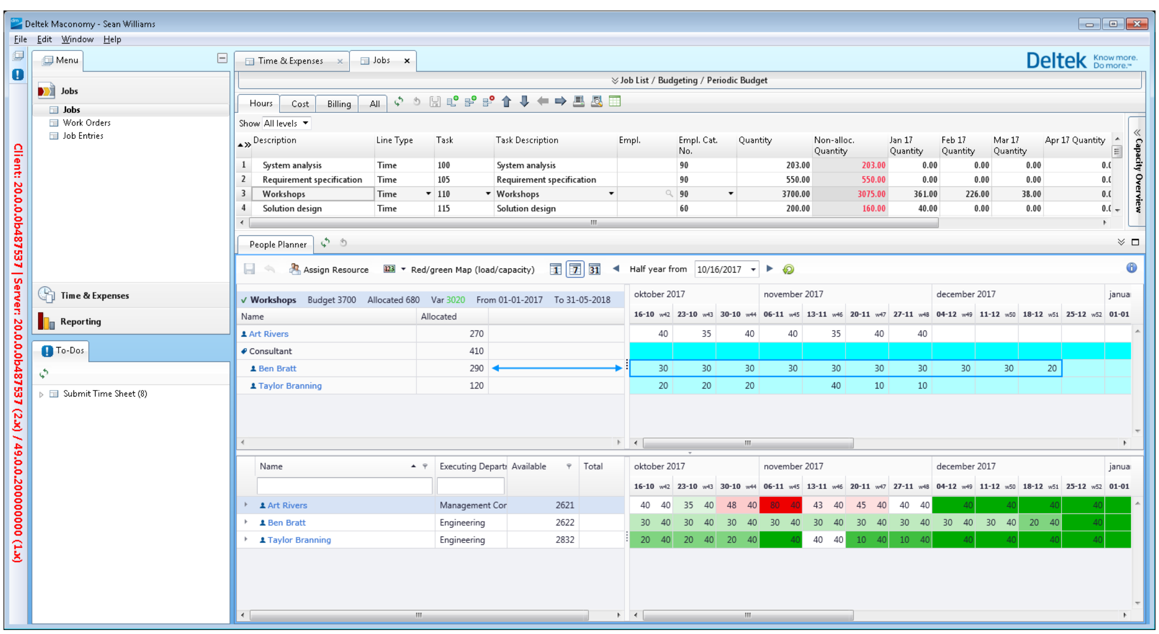
You can use the button to maximize the Budgeting Assistant and the double-arrow button at the top of the workspace to restore it.



You can also drag the splitters between the different panes to resize them.

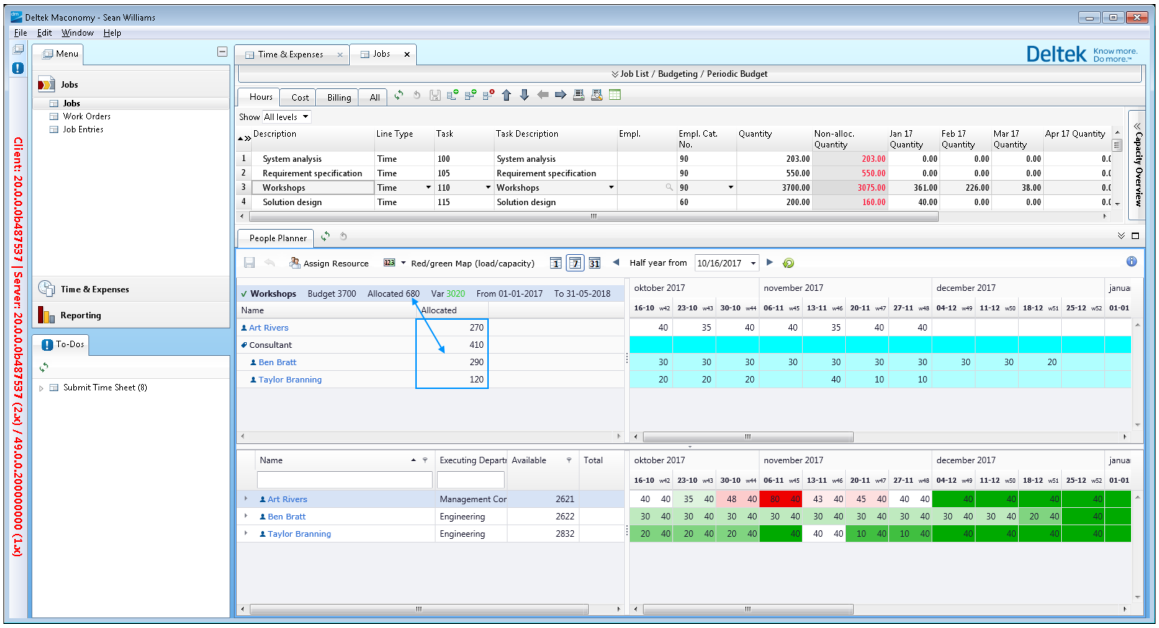
Allocated Hours vs. Budgeted Hours

The Allocated column displays the sum of all of the hours for each resource who has been allocated—that is, booked—on the task. Allocations are also called bookings.



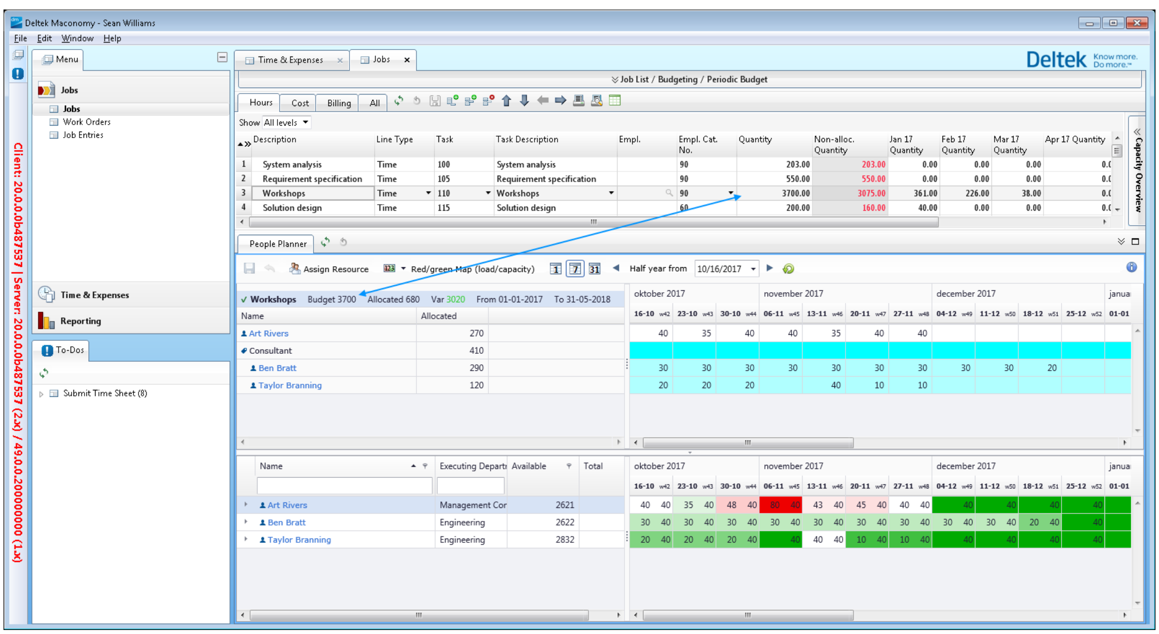
Bookings on a sub-assignment are summed on the resource category. The preceding figure shows 410 hours on the Consultant. This is the sum of the 290 hours from Ben Bratt and the 120 hours from Taylor Branning.

The numbers in the Allocated column are in turn summed on the top line.



The 410 hours on Consultant are only included once in the sum.

In Maconomy, each budget line has a Quantity that shows the budgeted hours. The Quantity is duplicated in the top line as Budget.



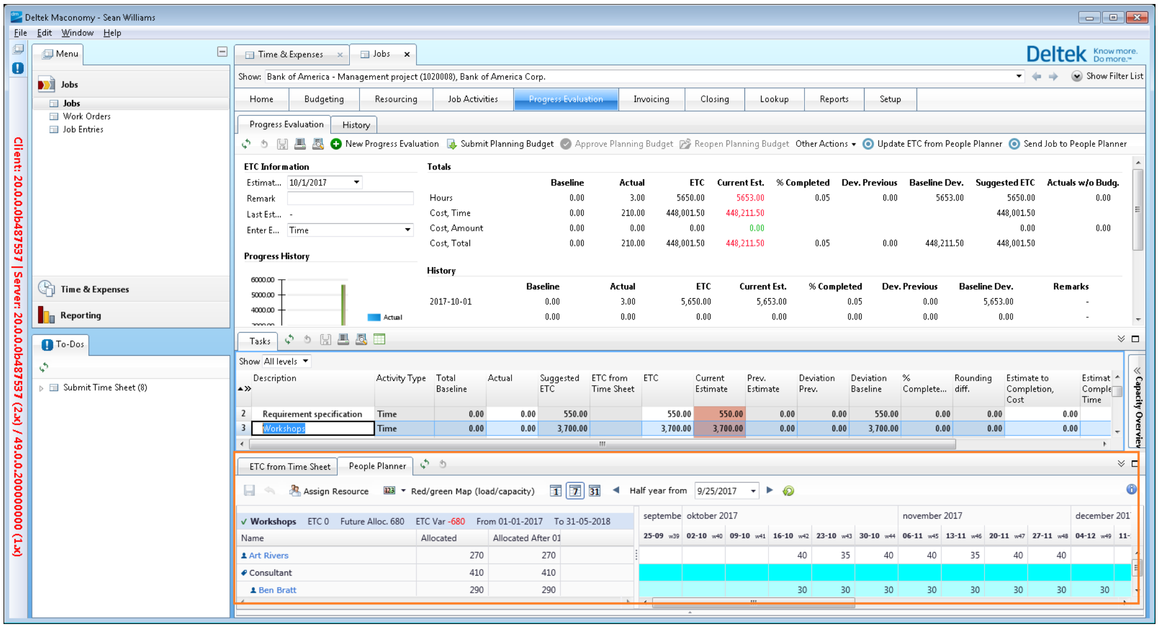
When you book the resources on the project, you are planning hours of the budgeted hours. The Budgeting Assistant makes it easy to compare the allocated hours with the budgeted hours:

- The **Budget** field shows the number of hours that have been budgeted for the task.
- The **Allocated** field shows the number of hours that have been allocated for the task.
- The **Var** (variance) field shows the difference between the budgeted hours and the allocated hours.

The variance is color-coded: green means that there are still hours available in the budget, and red means that the budget has been exceeded.

Progress Evaluation Assistant

The People Planner Progress Evaluation Assistant (PEA) is embedded in the Jobs workspace, under the Progress Evaluation tab.



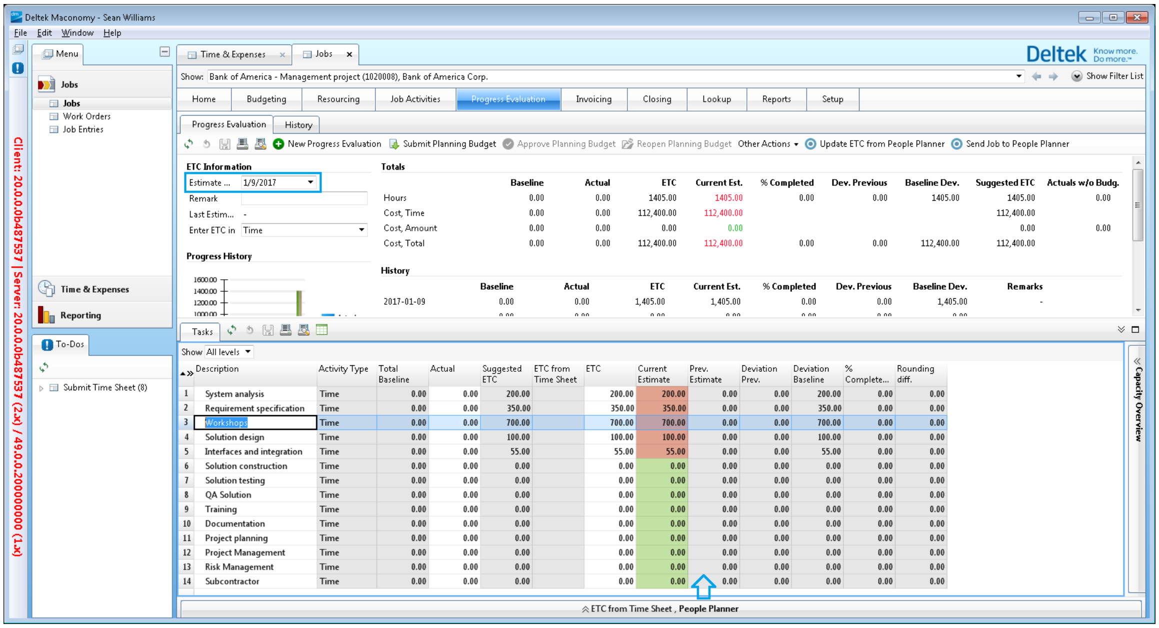
The Progress Evaluation Assistant displays how much planned work there is left on your project. For this to work you must provide it with the date after which you want the Assistant to calculate how much work remains to be performed; this is called the Estimate Date. The Estimate Date could be "today's date" or some other date for which you want to know the ETCs – Estimated Time to Complete.

Locate the Progress Evaluation Assistant

To locate the Progress Evaluation Assistant:

1. Go to **Menu » Jobs » Jobs**.
2. In the Job List, select the job that you want by double-clicking it.
3. Click the **Progress Evaluation** tab, and then the **Progress Evaluation** sub-tab.

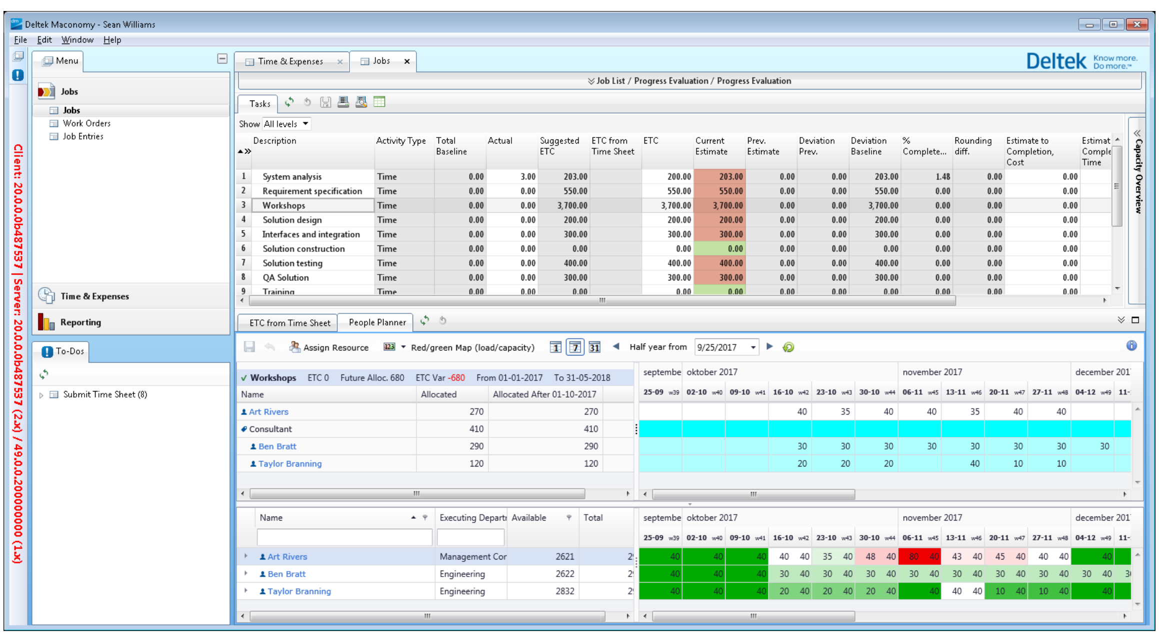
4. Choose the date that you want from the drop-down list for the **Estimate Date** field.



5. In the budget list, select the budget line that you want to work with.
6. Expand the Progress Evaluation Assistant by clicking the double arrow button at the bottom of the Jobs window (where it says **People Planner**).
7. Click the **People Planner** tab.

Resize the Progress Evaluation Assistant

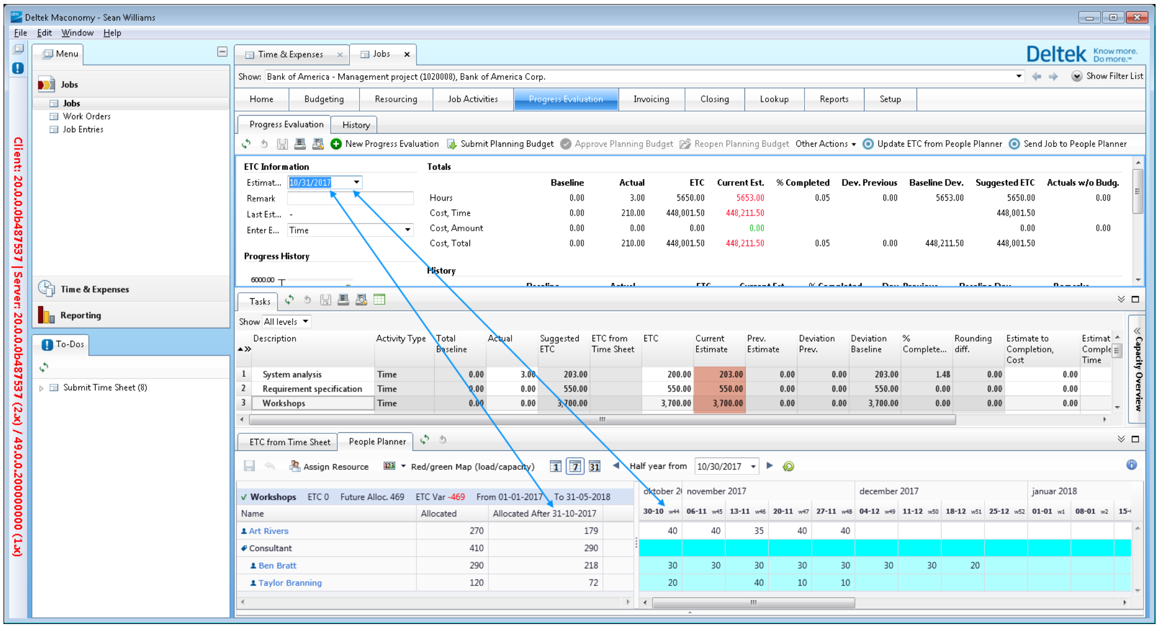
You can use the ☐ button to maximize the Progress Evaluation Assistant and the ≚ button to restore it.



Estimate Date

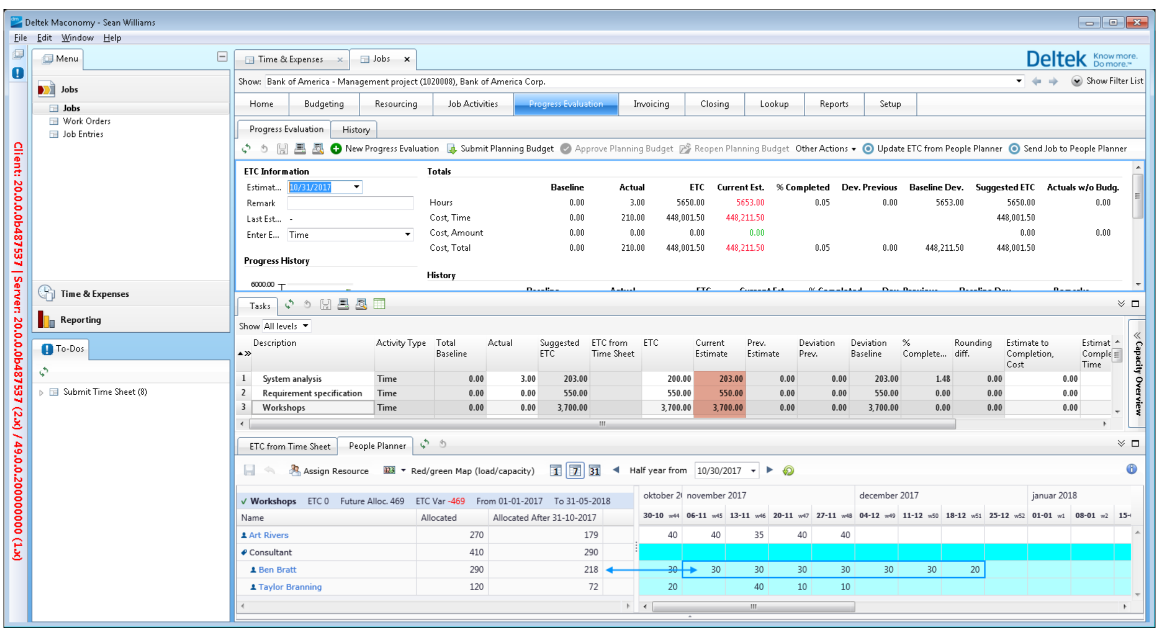
When you change the Estimate Date, the Progress Evaluation Assistant updates the following:

- The visible period starts at the selected Estimate Date.
- The <date> in the Allocated After <date> column is set to the Estimate Date.
- The Allocated After <date> column is updated with the numbers for the selected date.

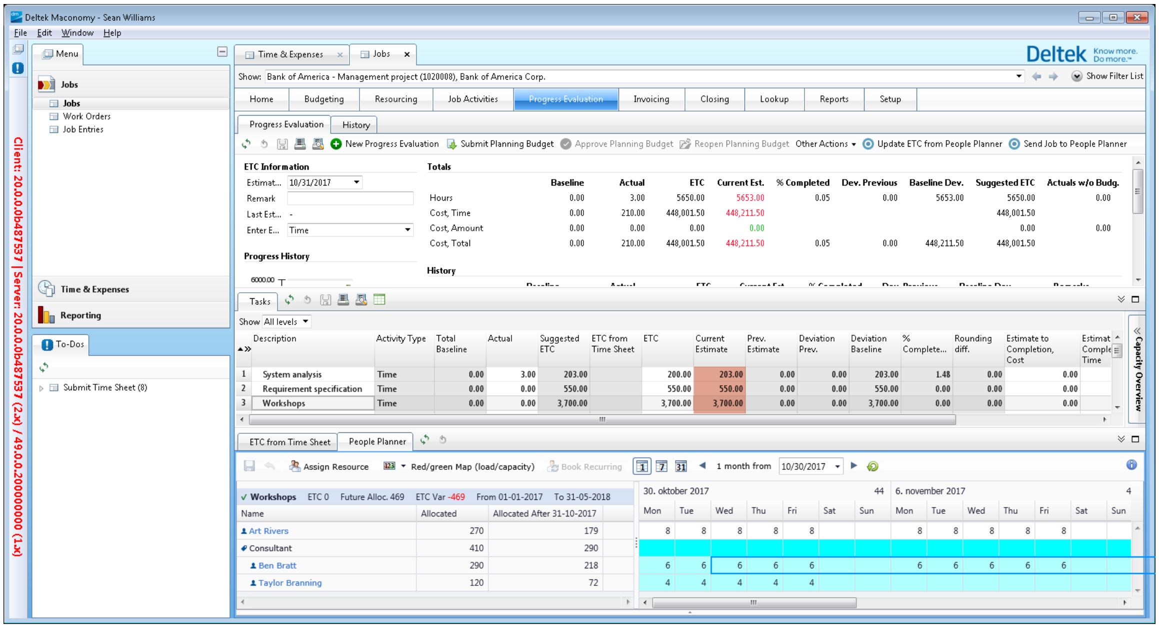


The Allocated column is the same as described for the Budgeting Assistant.

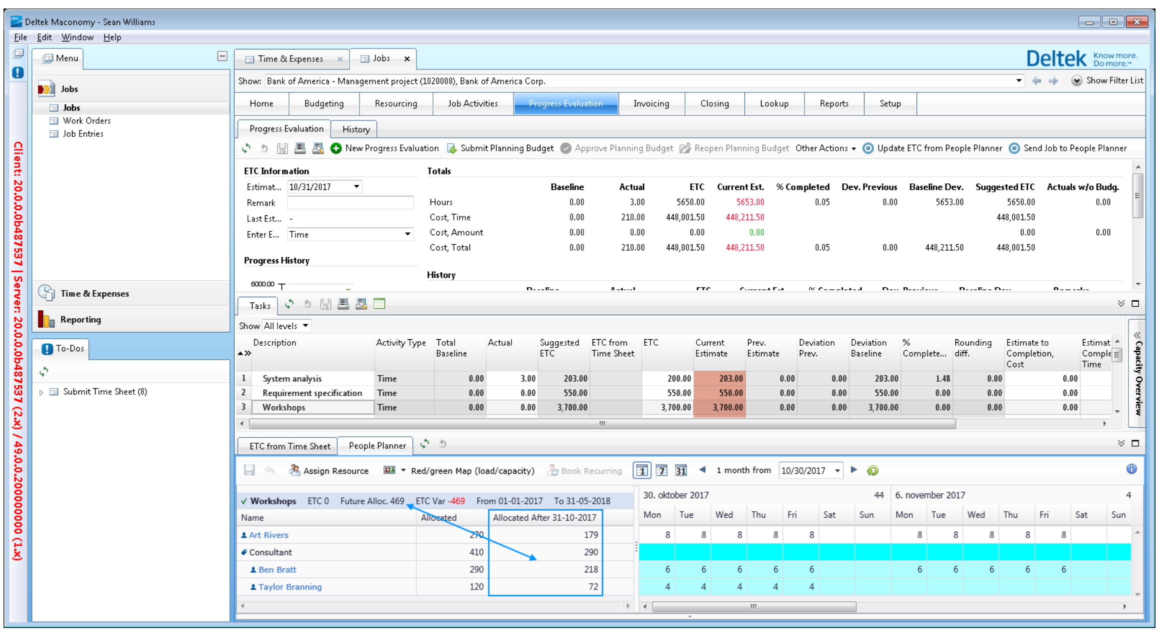
The function of the Allocated After <date> column functions in the same way as the Allocated column does, except that this column exclusively sums all of the allocated hours after the Estimate Date. This column does not include the values on the date itself.



In the example, week 44 is split between 2 months, and only 18 of the 30 hours occur after the Estimate Date.



The numbers in the Allocated After <date> column are in turn summed on the top line as the Future Allocations:



The Future Allocations are the planned hours that remain on the project after the Estimate Date. The Progress Evaluation Assistant makes it easy to compare this with the estimate of how much of the budget is left for the project.

In the top line:

- The **ETC** field displays the estimated remainder of hours on the project—Estimated Time to Complete.

- The **Future Alloc.** field displays the number of hours that have been allocated for the task after the Estimate Date.
- The **ETC Var** (variance) field displays the difference between the ETC and the future allocated hours.

The variance is color-coded: green means that there are still hours available in the estimated remainder of the budget, and red means that the ETC has been exceeded.

> **Note:** You can compare the Allocated After <date> column to the functionality of the Update ETC from People Planner button. The difference is that the Allocated on and After column is constantly updated with the sum of the bookings as soon as you enter them, whereas the Update ETC from People Planner button imports them into Maconomy only when you click it. See Update ETC from People Planner for more details.

Previous Estimate Date

When you change an existing estimate date, this is saved as the previous estimate date before the new estimate date takes effect. When you run progress evaluations between planned periods, such as in the middle of a month, you can use the following columns to view your progress:

- Allocated Current Period
- Allocated Current Amount Period

> **Note:** These columns are not available by default. You must first add them as Available Columns, then select them for use through the Column Chooser.

Once you have selected these columns to display and have run a progress evaluation, the Progress Evaluation Assistant updates them as so:

- The Allocated Current Period column is updated with the bookings between the Previous Estimate Date and the Estimate Date.
- The Allocated Current Amount column is updated with the planned hours between the Previous Estimate Date and the Estimate Date.

> **Note:** These fields display values only if a progress evaluation has been completed before the current one.

These columns function similarly to the Allocated and Allocated Amount columns, except they exclusively sum up all totals between the Last Estimate Date and the Estimate Date.

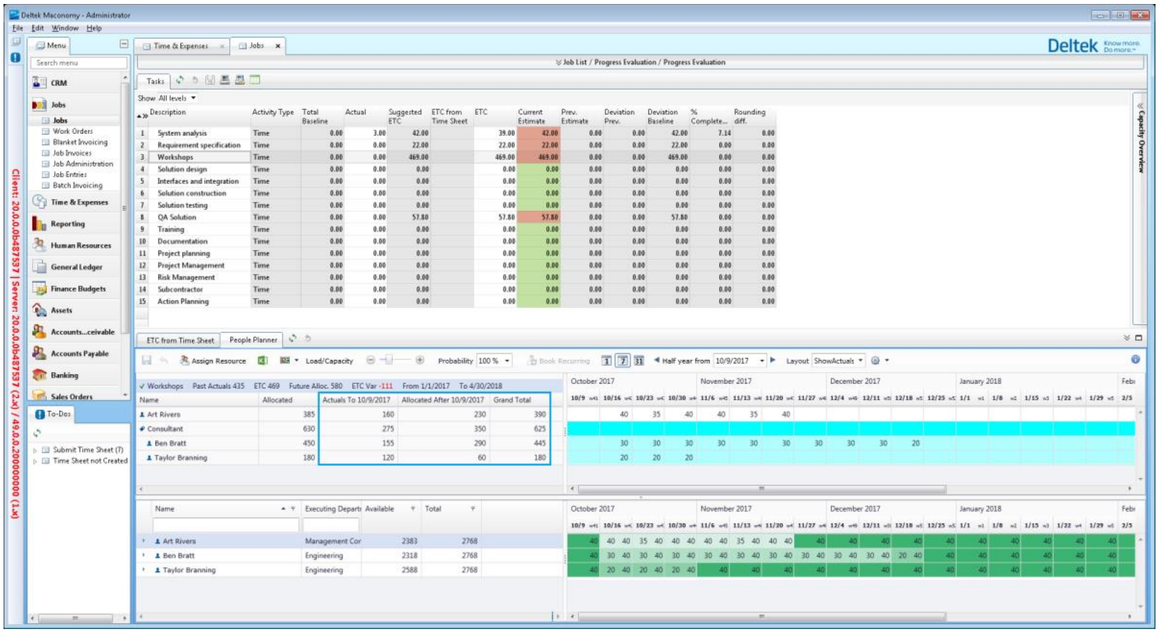
Actuals

When evaluating the progress of a project, it can be useful to compare how much time has already been spent on the project with how many hours are still planned.

> **Note:** Before you can add the Actuals To and Grand Totals columns, they must first have been added to the Column Chooser as available columns. See Specify Available Columns in the Column Chooser.

To add the Actuals To column:

1. Right-click on the header. This opens the **Column Chooser**.
2. Select the **Actuals To** column and the **Grand Total** column.



The **Actuals To** column shows the sum of actuals—that is, time registrations—up until and including the **Estimate Date**.

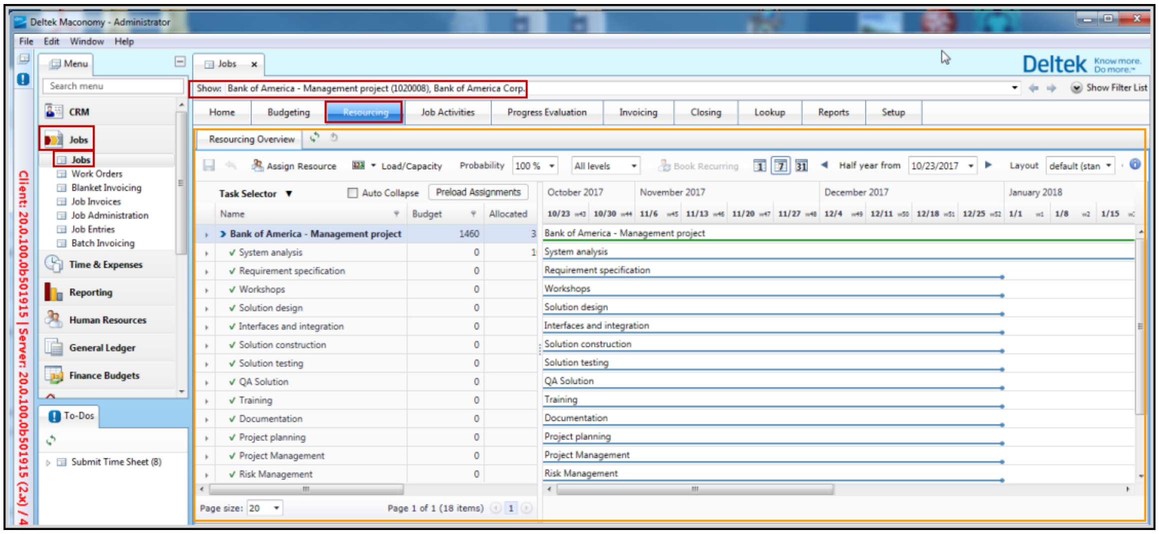
The **Allocated After** column shows the planned hours after the **Estimate Date**.

The **Grand Total** columns sum the Actuals up to the Estimate Date with the planned hours after the date. This sum should ideally be equal to the budgeted hours on the project.

Tip: To see the individual actuals, you can select the **Actuals & Allocated** display view.

Resourcing Overview

The Resourcing Overview Assistant, typically referred to as the Resourcing Overview (RO), is embedded in the Jobs workspace, under the Resourcing tab.



> **Note:** The Resourcing tab was introduced with Maconomy 2.4.

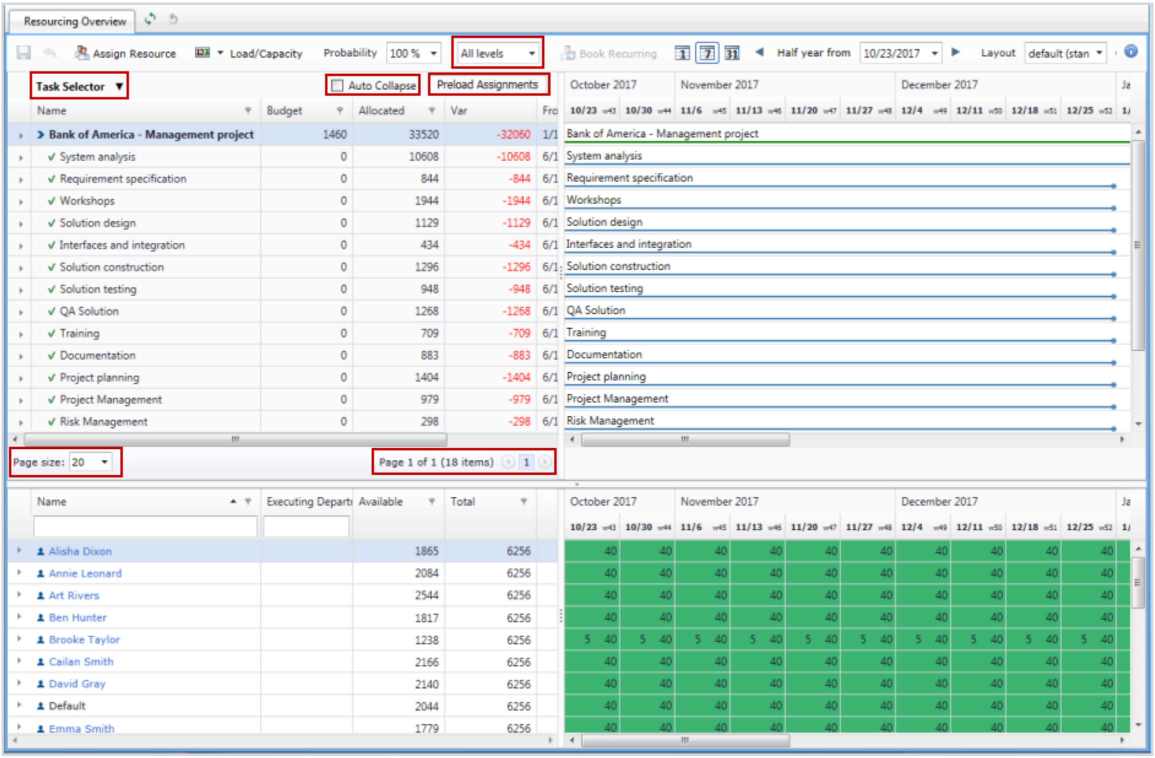
Locate the Resource Overview

To locate the Resourcing Overview:

1. Go to **Menu » Jobs » Jobs**.
2. In the Job List tab, select the job that you want by double-clicking it.
3. Click the **Resourcing** tab. The **Resourcing Overview** sub-tab is displayed.

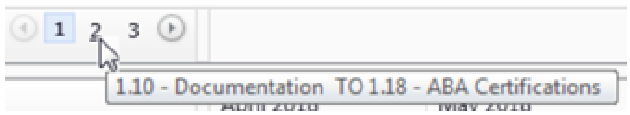
Resourcing Overview Controls

The following controls are available in the Resourcing Overview (RO), in addition to those described in [WSC Components Shared Functionality](#).



The following table describes these controls.

Control	Description
Task Selector ▼	Click the drop-down arrow to display the Task Selector dialog box. The Task Selector enables you to limit the list of tasks that are displayed in the Project Managers Gantt (PG) chart in the Resourcing Overview (RO). When the Task Selector is active, the drop-down arrow is red: **Task Selector ▼** See [Select the Tasks to Display in the Project Managers Gantt Chart](#) for more information.
All levels ▼	Choose a value from this drop-down list to define the depth of the project to display in the Project Manager Gantt (PG) chart. For example, if you choose Level 2, the PG shows Level 0 (the project) and Levels 1 and 2 (the tasks that are direct children of the project and the children of those children).
Page size: 20 ▼	Use this drop-down to set the number of task lines to display per page. You can choose 10, 20, 30, 40, or 50 tasks per page. This setting is in effect for the current session only; the next time that you open the RO, it

Control	Description
	reverts to the default as set by your system administrator, which is typically 20.
	Displays the number of the current page, the total number of pages, and the total number of items that can be displayed. When you hover your cursor over a page number, a tool tip indicates which tasks (by WBS range) are on that page, as shown in the following example.  You can use the forward and backward arrows and the page numbers—as shown in the preceding figure—to move quickly to a specific page.

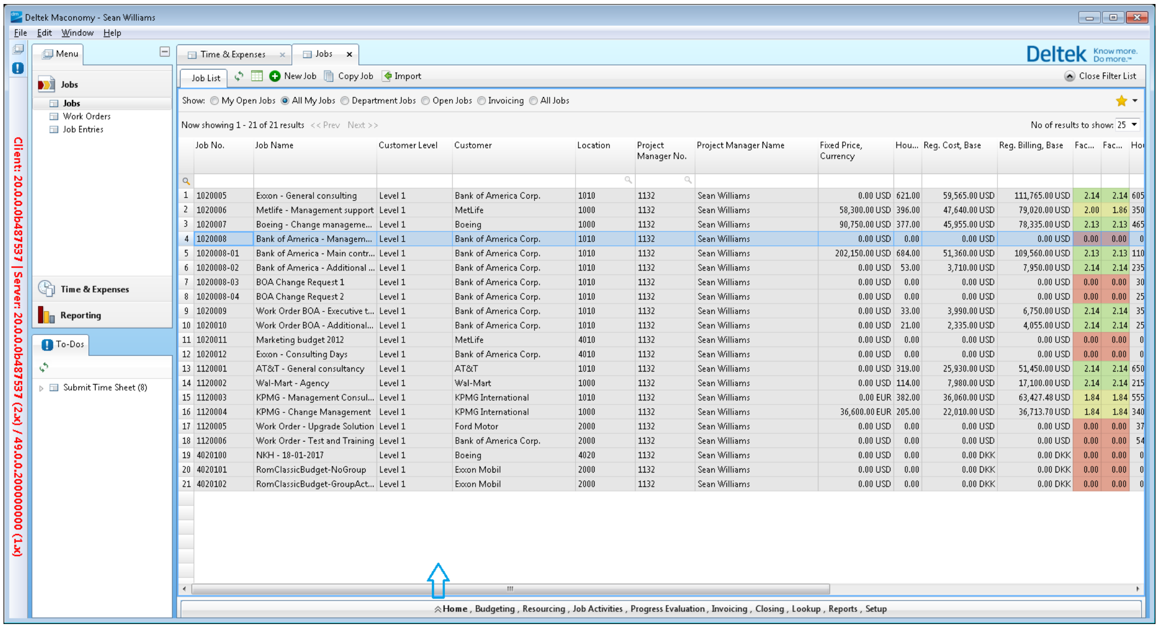
Resize the Resourcing Overview

When you double-click a job in the Job List, the Job List selects the job and then closes itself to take up as little of the screen space as possible.

Instead of double-clicking the job, you can just click the job; the Job List then remains open.

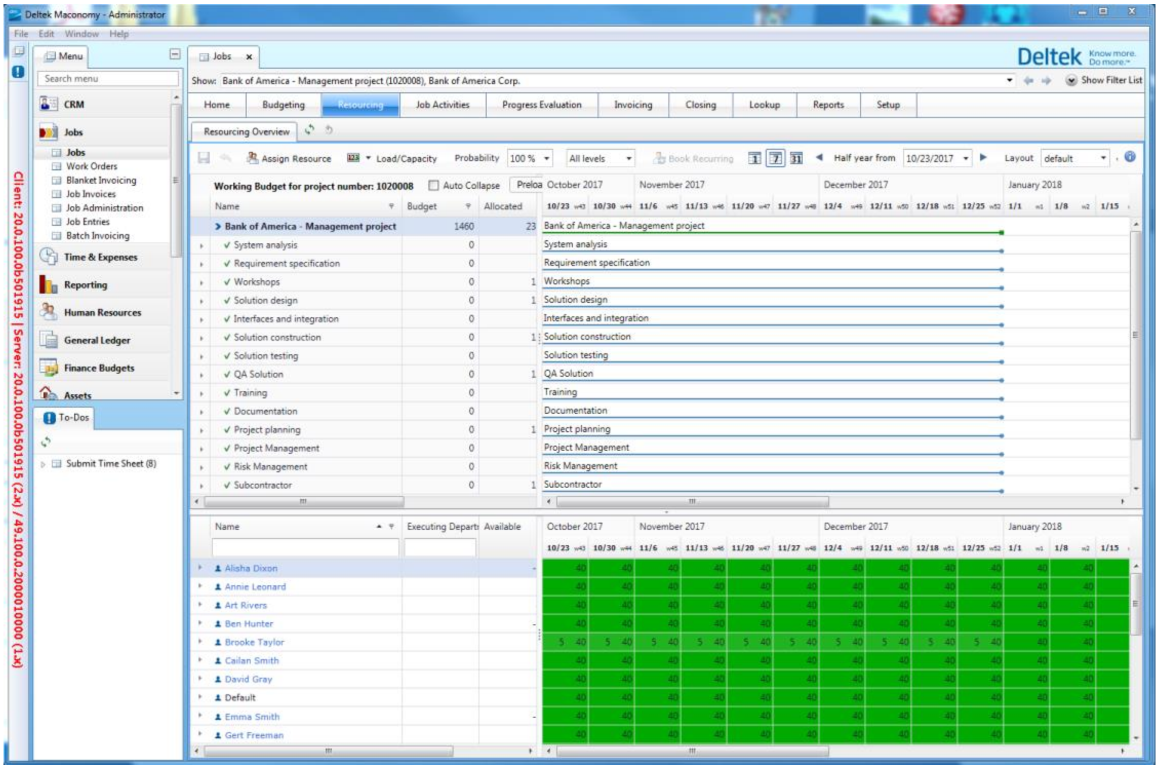
To resize the Resourcing Overview:

1. Go to **Menu » Jobs » Jobs**.
2. In the Job List, select the job that you want by single-clicking it.



3. Click the button at the bottom of the Jobs window to expand the Home, Budgeting, Resourcing … panel.

4. Click the Resourcing tab and then the Resourcing Overview sub-tab.



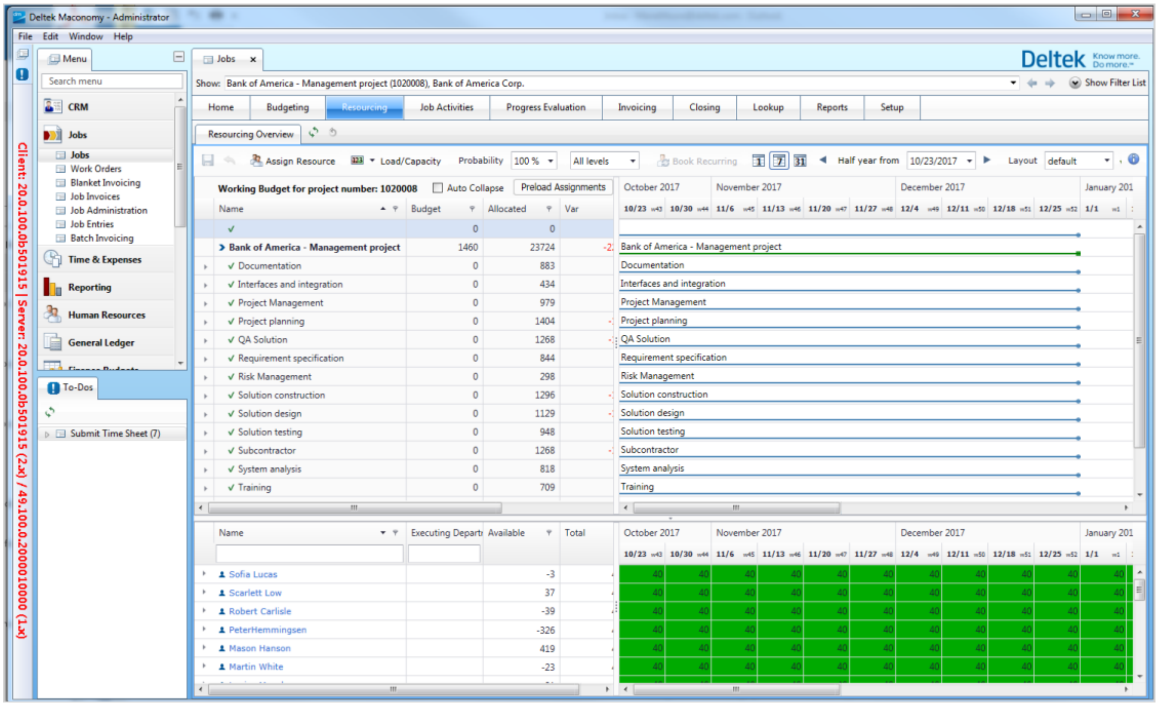
You can use the Close Filter List button to maximize the Resourcing Overview and the Show Filter List button to restore it.

Project Manager Gantt Chart

If you compare the Resourcing Overview with the People Planner Windows Application, the top half corresponds to using the Project Manager Gantt Chart (PG) combined with the Project Selector. The bottom half corresponds to the Resources Gantt Chart (RG).

The Job List serves the role of the Project Selector, and the Resourcing Overview then functions as a PG with the Display Selected Project button clicked.

Each budget line is represented with a blue Gantt bar. The job itself is represented by a green Gantt bar. The start and end of each Gantt bar correspond to the beginning and end of the task.



The PG can display other types of Gantt bars than these, and not all of them have a counterpart as a budget line in Maconomy. The kind of the task is indicated by the icon in front of its name.

Icon	People Planner	Maconomy
	Project	Job.
	Task	Budget line of line type Time.
	Summary	Budget line of type Sum/Text.
	Absence	Does not exist. Instead, absence management is handled through the calendar in Maconomy.
	Milestone	
	Amount	Budget line of type Amount or Outlay.

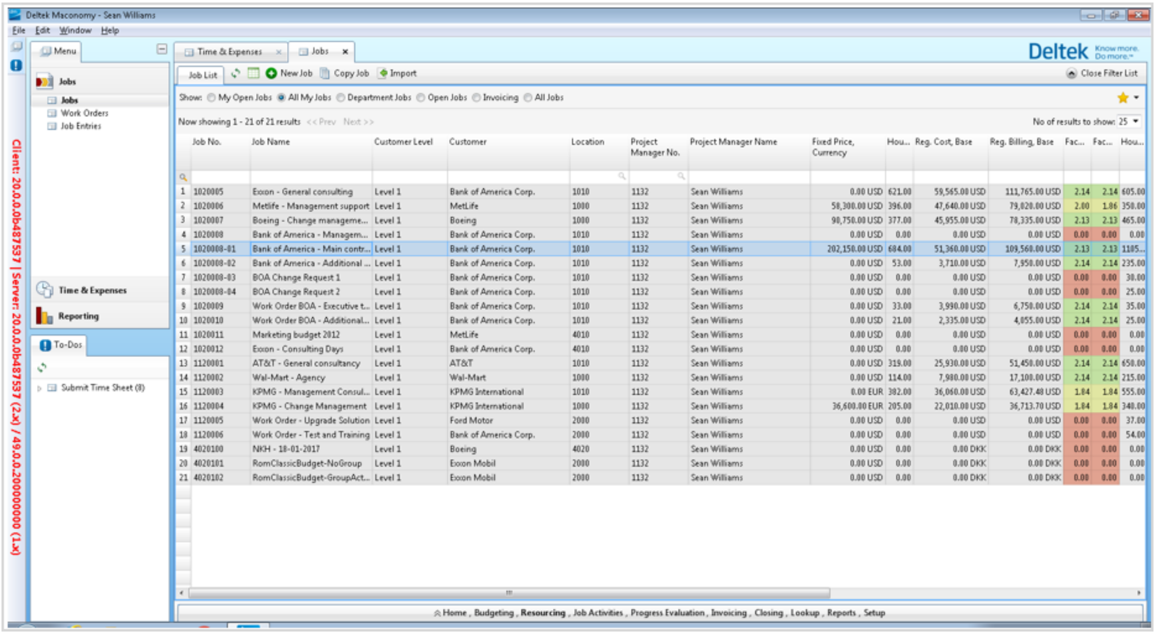
The Resourcing Overview does not show you any of the potential sub-projects to the project.

View the Resourcing for a Sub-project

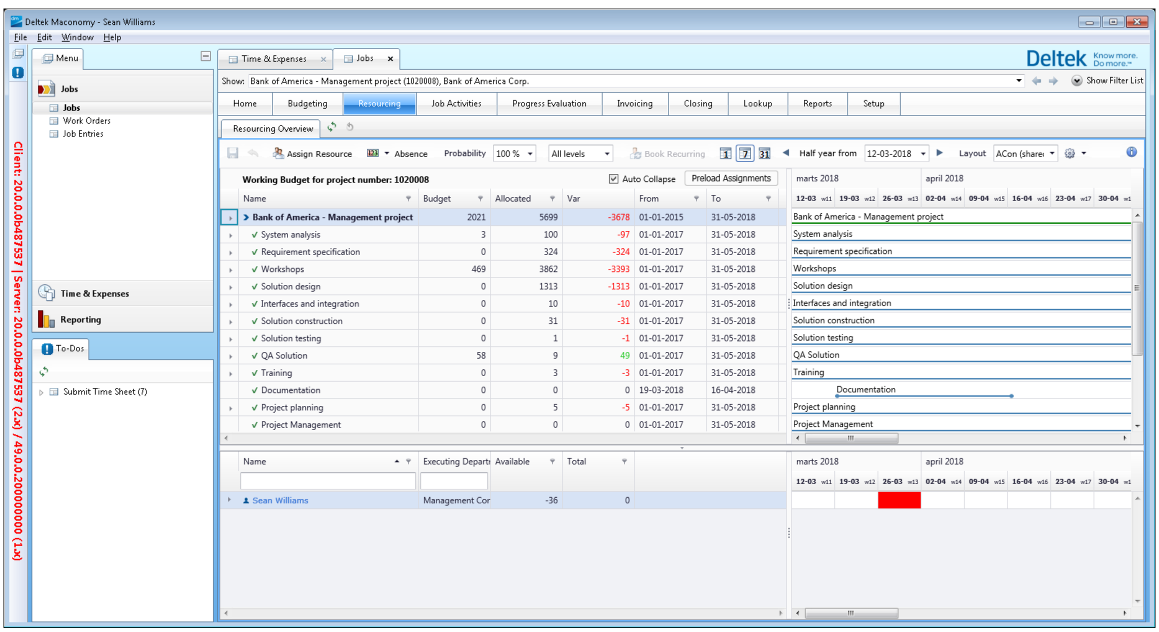
To see the resourcing for a sub-project:

1. Expand the Job List.

2. Select the sub-project.



3. Open the Resourcing Overview for the sub-project.



Select the Tasks to Display in the Project Managers Gantt Chart

The Resourcing Overview (RO) Project Managers Gantt (PG) chart typically displays 20 task lines per page, although, your system administrator can set this to a different value. If you are working with a project that consists of a large number of tasks, navigating through that list of tasks, page by page, can be cumbersome.

You can use the Task Selector dialog box to quickly select the tasks that you want to see before loading them into the RO PG. The Task Selector displays a Work Breakdown Structure (WBS) task tree from which you can select the tasks that you want to see in the PG. As you select the WBS check boxes for the tasks that you want to display, the status line at the bottom of the Task Selector displays the number of selected tasks and the total number of tasks. When you click Apply, those tasks (and any parent tasks) are loaded into the RO PG.

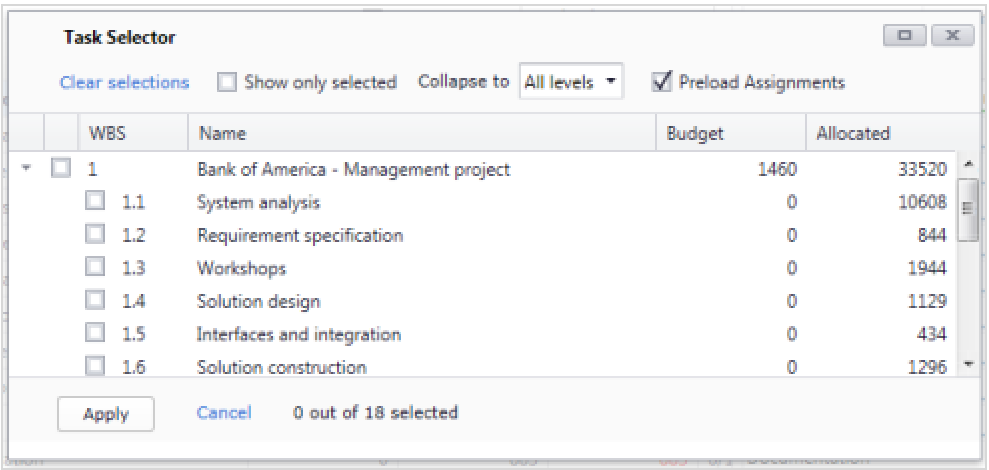
When you use the Task Selector to select and navigate through pages of tasks, the first line of a page is often a task whose parent appeared on a previous page. Thus, you would not be able to see the parent task's name without navigating back and forth between pages. However, if you hover your cursor over a task name, its parent task's name is displayed as a tool tip.

Use the Task Selector to Limit Tasks Displayed by RO PG

To use the Task Selector to limit the tasks that the RO PG displays:

1. Access the RO for the project whose tasks you want to display.
2. Click the Task Selector ▼ drop-down.

   The Task Selector dialog box is displayed. The following figure shows an example.



3. Select the check box(es) for those tasks that you want to display in the PG.

   If you select a sub-task, all parent tasks are also automatically selected. The status line at the bottom of the dialog box tells you the number of selected items and the total number of items.
4. Select the **Show only selected** check box to limit the list of displayed items to those that you selected.
5. Choose a level from the drop-down list for the **Collapse to** field if you want to collapse the entire list to the selected level.
6. Click **Apply** to display the information for the selected tasks in the PG.

Tip: When the Task Selector button ▼ is active—that is, the tasks that are displayed in the RO PG have been limited by the Task Selector—the Task Selector button turns red Task Selector ▼.

To clear any previous selections and deactivate the Task Selector button, click **Clear selections** in the Task Selector dialog and then click **Apply**. All tasks are then displayed in the RO PG.

> **Tip:** When the Task Selector button ▼ is active, column filter drop-downs in the PG display only values for the available (selected) tasks.

Always Display the Task Selector for Large Projects

It might be appropriate to always open the Task Selector when you want to work in the RO PG.

For example, in a large project that contains many tasks, where the tasks that you want to work with are probably not among the first (default) twenty tasks that are typically loaded into the RO PG.

Your system administrator can configure this, using the setting **Force Task Selector Threshold**.

If you open the RO PG for a project that has a larger number of tasks than the value of Force Task Selector Threshold, the Task Selector opens automatically. For example, if the value of Force Task Selector Threshold is zero, the Task Selector will always be displayed. On the other hand, if the value of Force Task Selector Threshold is a very large number, the RO PG will always display the first (default) twenty tasks.

Columns

The Resourcing Overview has the following columns.

Column	Description
Name	The title of the task. When you hover your cursor over a task name, a tool tip displays the name of the project to which it belongs.
Budget	Task line: The number of hours that have been budgeted for the task.
Allocated	Task line: The sum of all of the hours that have been allocated—that is, booked—on the task.
Var	Task line: The variance (difference) between the budgeted hours and the allocated hours.
Amount	Amount line: The amount that has been budgeted for the amount line. This column is not shown by default. You must add it by editing the layout. See Add Columns.
Allocated Amount	Amount line: The sum of all of the amount bookings that have been allocated on the amount line. This column is not shown by default. You must add it by editing the layout. See Add Columns.
Var Amount	Amount line: The variance (difference) between the budgeted amount and the allocated amount. This column is not shown by default. You must add it by editing the layout. See Add Columns.
From	

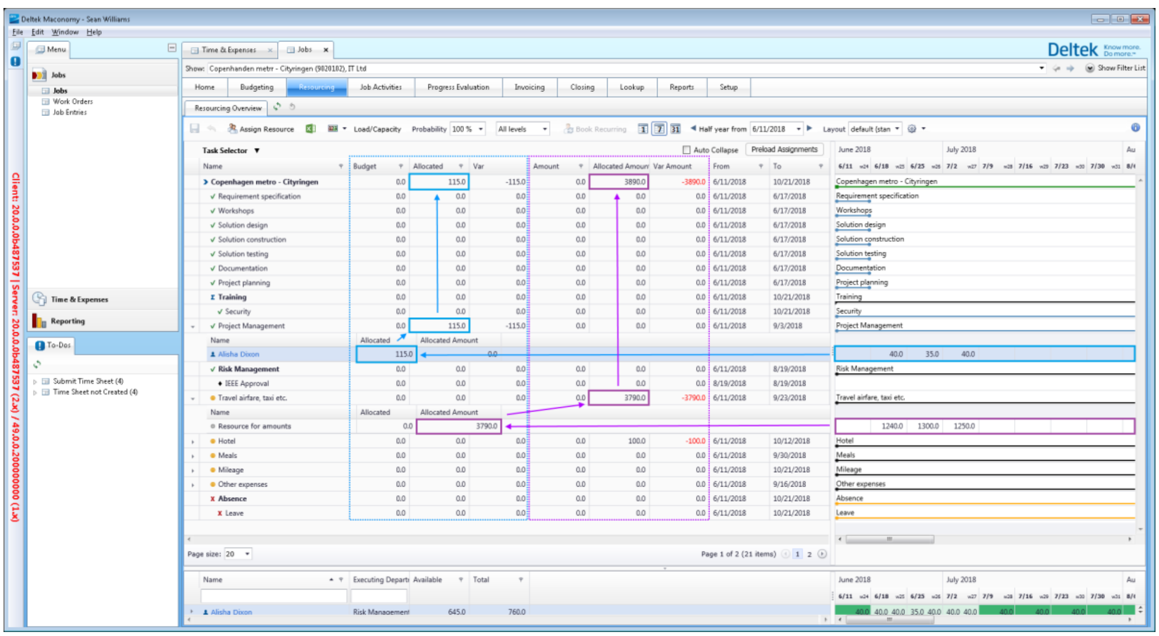
Column	Description
To	Together, the From and To columns indicate the duration of the task. This information is mirrored by the start and finish of the Gantt bars. ▪ For a job, you find the From and To as Start and Ending in the Job workspace, under the Home tab and then under the Information sub-tab. ▪ For a budget line, you find the From and To by adding the columns Planned Starting Date and Planned Ending Date. Jobs or budget lines do not necessarily have a From or To date in Maconomy. If they do not have these dates, People Planner assigns a start and finish when the job is exported from Maconomy. See the *Deltek People Planner Integrations Guide* for more information about how the dates are handled in People Planner.

Assignments and Bookings

Tasks with assignments are indicated with a small  icon in front.

You can click this button to see the assignments. You can click the button again to collapse the list of assignments.

The **Allocated** column in the assignments sub-grid displays the sum of all of the hours that the individual resources have been booked. The **Allocated** column on the PG is then the sum over the numbers in the column in the assignment sub-grid. Finally, the sum of all of the Allocated hours is summarized on the job line. The **Var** column shows the difference between the **Budget** column and the **Allocated** column.



The **Allocated** column only sums over the hours bookings for task lines. If you are interested in the sum over the amount bookings on the amount lines, you can add a similar set of columns that covers this.

The **Allocated Amounts** column in the assignments sub-grid displays the sum of all of the amount-bookings on the special Amount resource. The Allocated Amounts column on the PG is then the sum of the Allocated Amounts from all of the assignment sub-grids. These are summarized at the top. Finally the

Var Amount column shows the difference between the **Amount** column and the **Allocated Amount** column.

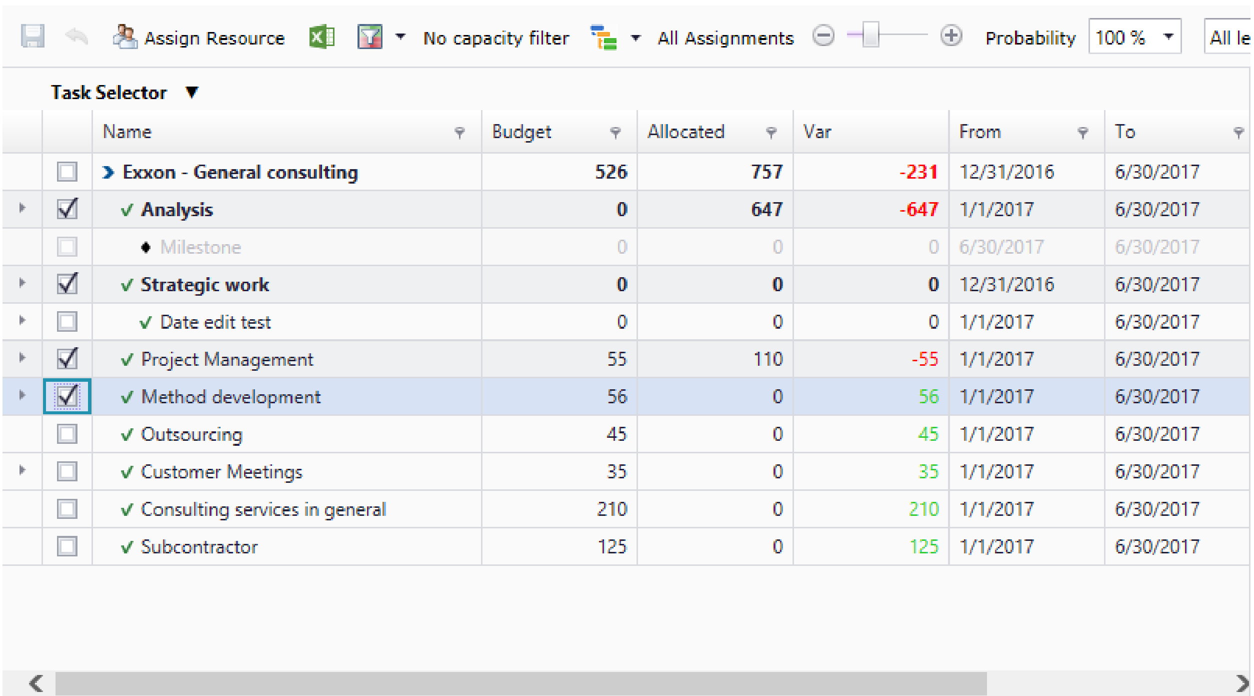
See Add Columns for information about how to add columns.

Assign a Resource in the Resourcing Overview

You can assign multiple resources to tasks in the Resourcing Overview.

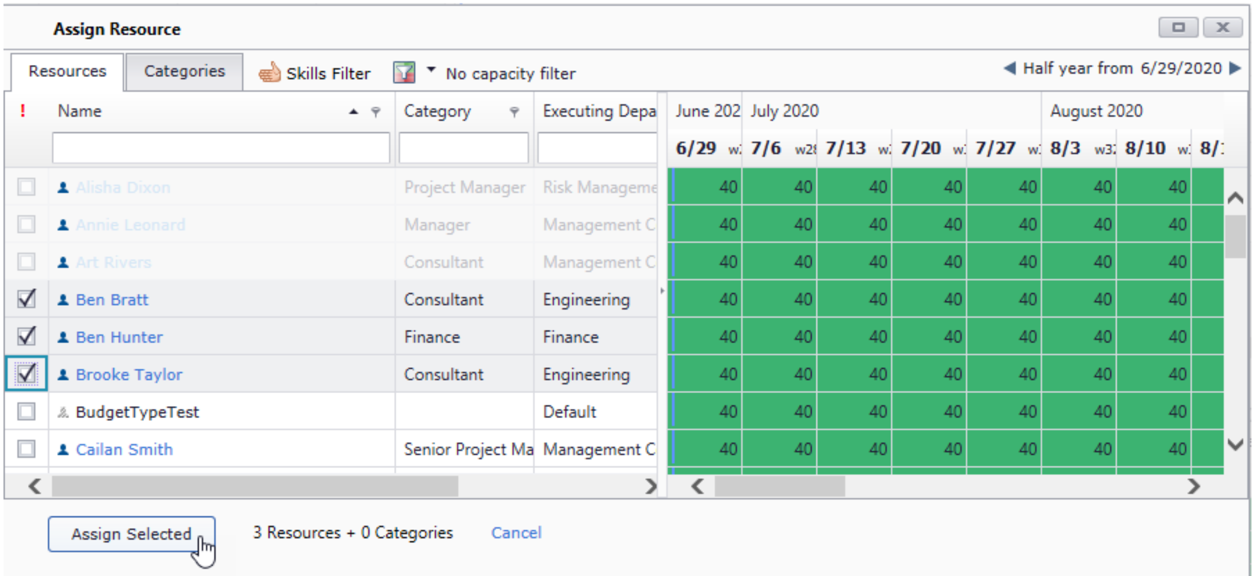
To assign a resource:

1. Select one or more tasks.



> **Note:** The tasks that you cannot select—for example, because the task is a milestone—are disabled. When you hover your mouse over a blocked task, a tool tip explains why it is disabled.

2. Click **Assign Resource**.
3. In the dialog box that appears, select one or more resources to assign to your task(s).



4. Click the **Assign Selected** button to assign the resource(s) to the task(s).

Edit From and To Dates

You may not want Maconomy to control the start and end dates on events such as projects, tasks, and milestones in the Resourcing Overview (RO).

You can edit the From and To dates for such events in the RO Project area (at the top of the RO).

Warning: You should ensure that your People Planner installation is configured so that the **Use Maconomy dates when sending projects from the Maconomy Portal** setting is NOT set to **Always** because this causes Maconomy to overwrite edited dates the next time that a job/project is sent from Maconomy to People Planner.

Alternatively, you can set **Use Maconomy dates when sending projects from the Maconomy Portal** to **Never** or **FirstTime**. Using either of those values, edited dates are retained in People Planner, rather than being overwritten by Maconomy.

Note: You cannot edit the From and To dates for events on projects that are configured as read-only.

Note: If the auto-save functionality is enabled, all data is saved after selecting an event's From or To dates. Additionally, the **Save** and **Undo** buttons are hidden in the toolbar.

To edit an event's From or To date:

1. Select the event's From or To date.
2. Choose the new date from the calendar drop-down.

It is important to note the following:

- You can only change From or To dates for events that do not have child events. The From and To dates of a parent event are determined entirely by the From and To dates of all of its children, combined. The From and To dates of a parent event are thus updated when you edit the From and To dates of any of its children.
- You must save or cancel any unsaved bookings before you can change From or To dates. If you have not saved or canceled, the calendar drop-down is disabled; a tool tip tells you that you must save or cancel bookings before you can edit those dates.
- When you are editing From and To dates, you cannot create bookings, some buttons (except for Save and Undo) are disabled, and some grid layout options (such as adding or removing columns) are disabled. For example, you cannot remove, sort, or group on the date column that you are in the process of editing.

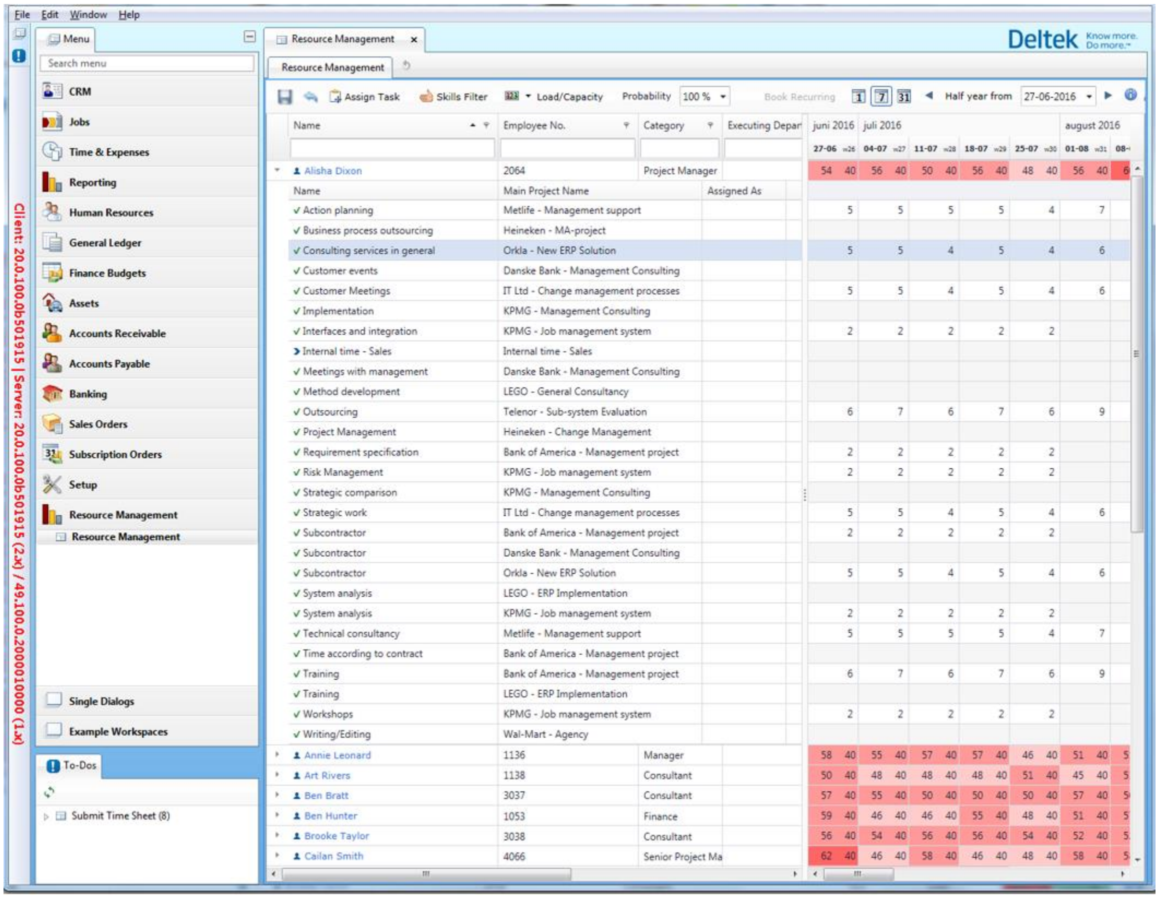
Bookings

You cannot create bookings in the Capacity Overview. You can however create bookings in the Resource Management overview.

Resource Management

Resource Management (RM) focuses on displaying resources and their available capacities. Its purpose is to help Project and Resource Managers select the correct resources for the task.

A difference from working in the CO is that when you use the RM, you are not working in the context of a selected budget and budget line. That is, when you use the RM, you have not previously selected a job, budget, and budget line.



Locate the Resource Management Overview

To locate the Resource Management overview:

- Navigate to the Resource Management overview via **Menu » Resource Management » Resource Management**.

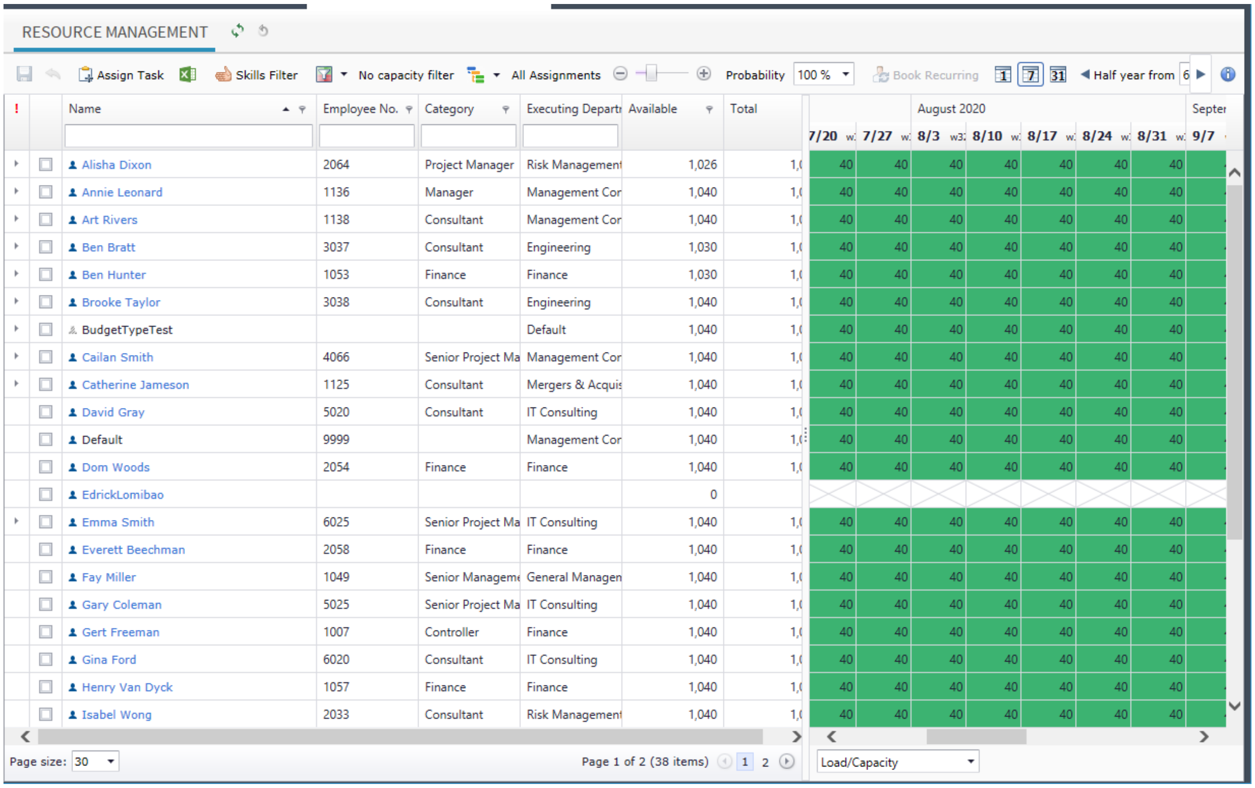
Assign a Task

The Resource Management screen shows you the **Assign Task** button.

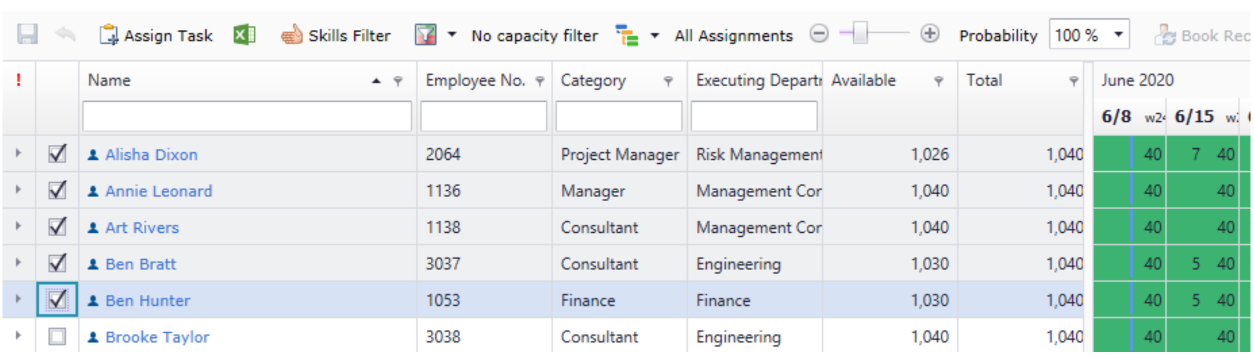
To assign a task to a resource:

1. Navigate to Resource Management (RM).

The RM shows the available resources in People Planner and how much available capacity they have.

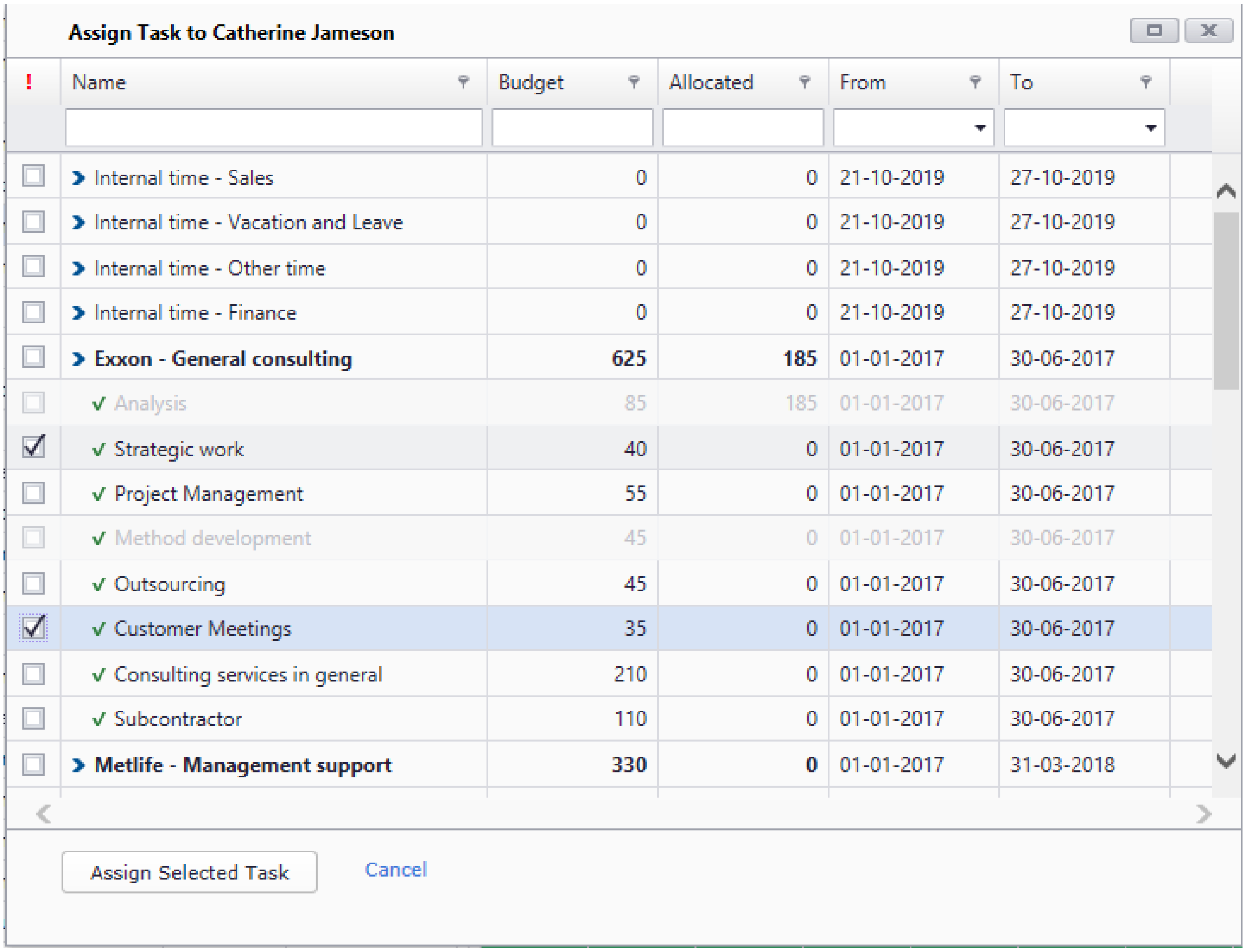


2. Select the checkbox for each of the resources that you want to assign to a task.



Note: The resources that you cannot select—for example, because the resource is blocked—are disabled.

3. Click **Assign task**. The RM displays a dialog with a list of tasks that the resource can be assigned to.



Note: The tasks that you cannot select—for example, because the resource is already assigned on the task—are disabled.

4. Select the check box for each of the tasks to which you want to assign the resource.
5. Click **Assign Selected Task**.

Bookings

You can create bookings in the RM. Bookings work exactly as described earlier. See Bookings.

Resource Summary View

The Resource Summary View provides resource managers with a time-lined overview of resource assignments and bookings. The view displays resources on one line only, with details of the events (budget lines) to which they are assigned and booked. Information is spread across a timeline, with key information such as project name, dates booked, and utilization percent displayed against each project booking.

Use Resource Summary View

To use the Resource Summary, select Resource Summary. The Resource Summary View shows the RG Gantt in timeline format.

Timeline Format

When the selected display view is Resource Summary, bookings are shown in Timeline format. In the Timeline format, each resource has a minimum of two lines. The first row is the Booking Row, and if a resource is booked on different events on the same day, week, or month, multiple booking rows display.

Inside the Booking Rows are Booking Entries. These contains information such as task name and hours booked along with a hover text / tooltip option to get more details about the booking. Additionally, adjacent visible booking entries on the same event are merged and the color is the same as the color of the event.

The Utilization Row is the last row of each resource. This row shows the resource utilization to indicate where gaps or overbookings occur. The utilization percentage in this row is the same as the 'Utilization %' in display view.

The Probability functionality is available in this view. If the selected probability is zero, the booking entry does not display.

Headline and Tooltip

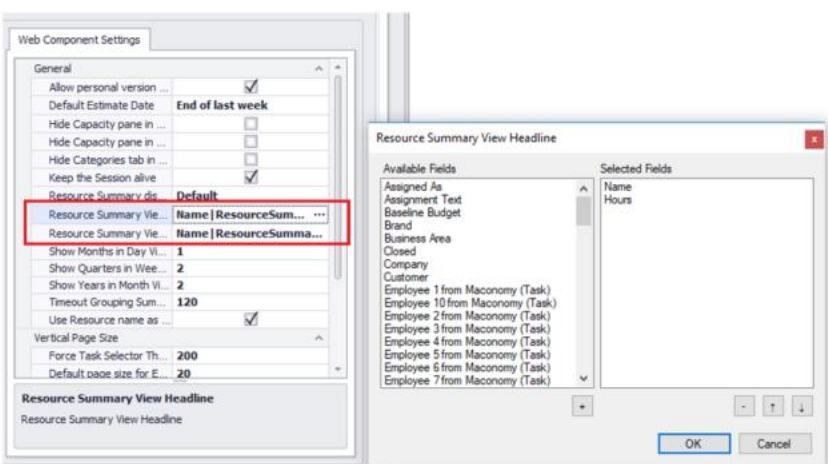
The People Planner Admin Tool contains two which control how booking entries should be displayed:

- Resource Summary View Headline
- Resource Summary View Tooltip

Both settings allow multiple selection of fields to show in the booking entries:

- **Hours** (ResourceSummaryEntryValue)—Shows the total hours of merged adjacent booking entries.
- **From** (ResourceSummaryEntryStart)—Shows the start of the merged adjacent booking entries.
- **To** (ResourceSummaryEntryFinish)—Shows the finish of the merged adjacent booking entries.

  Note: The dates in the **From** and **To** fields do not indicate the event or assignment start/finish.



While you can customize the sequence of fields in the header or tooltip, you cannot change the comma that separates the field values, or the colon that comes after the field name. However, field names are translatable. Additionally, the header only shows the field values (without the field name as prefix), while the tooltip always shows the field names.

The default value of Resource Summary View Headline is *Name|ResourceSummaryEntryValue*

The default value of Resource summary View Tooltip is *EventMainProjectNumber|EventMainProjectCustomer|Name|ResourceSummaryEntryStart|ResourceSummaryEntryFinish|ResourceSummaryEntryValue'*.

Create and Manage Bookings

The Resource Summary view enables you to easily create, edit, reassign, or delete bookings through the context menu. Right-click any of the Resource Summary entries to display its corresponding popup and related fields.

> **Notes:** The fields in the popups are not customizable. You cannot add or remove fields or change the position or order.

Context menu items include:

- **New booking:** Creates a new booking.
- **Edit**: Use to edit an existing booking.
- **Reassign**: Use to reassign an existing booking to a different resource
- **Delete**: Use to delete a booking.

> **Note:** New booking, Edit, Reassign, and Delete functions are disabled if you do not have access control for Edit Working Hours.

When refreshed, it is possible that new cells are merged, extended or shortened. Additionally, resource rows may be removed or added. The utilization rows recompute based on the changes made on the resource bookings.

Create a Booking

To create a new booking:

1. In the Resource Summary view, right-click an empty cell in booking rows and any cell in utilization rows. A popup displays with four fields.
2. In the **Event** field, choose an event type from the drop-down list.

   > **Note:** Available events depend on the Start and End fields. If the event start or finish intersects with the value in the **Start** / **End** fields, the event is included in the list.

3. In the **Start** field, choose the date the booking begins. The date selector is dependent on the selected view (Day/Week/Month).
4. In the **End** field, choose the date the booking finishes. The date selector is dependent on the selected view (Day/Week/Month).
5. In the **Hours** field, enter the number of hours estimated for the booking.
6. Click **OK**. The new booking is created.

   Or, click **Cancel** to exit without saving.

Edit a Booking

To edit a booking:

1. In the Resource Summary view, right-click the booking entry to edit.
2. In the **Start** field, edit the date the booking begins, as needed. The date selector is dependent on the selected view (Day/Week/Month).

   Note: For **Start** and **End** fields, if you are in Day view, only the edited day booking is changed. For instance, if the Start/End was changed to a span of week from a span of day, only the original day booking is changed and extended to a week, leaving any merged adjacent cells unchanged.
3. In the **End** field, edit the date the booking finishes, as needed. The date selector is dependent on the selected view (Day/Week/Month).
4. In the **Hours** field, edit the number of hours estimated for the event, if needed.

   If you are in Day view, the value of the **Hours** field shows the booking of that day, even when adjacent cells are merged together. To edit a whole booking by week/month view, change the view (Week/Month).
5. Click **OK** to save the updates, or click **Cancel** to exit without saving.

Reassign a Booking

To reassign a booking:

1. In the Resource Summary view, right-click the booking entry to reassign.
2. In the **Name** field, select the resource to whom to reassign the booking.
3. Right-click on the **From** or **To** field to edit as needed.

   When in Day view, the **To** field shows the same day. When in Week or Month view, the **To** field shows the end of week or end of month, respectively.
4. Click **Reassign Selected**.

Delete a Booking

To delete a booking:

1. In the Resource Summary view, right-click the booking entry to delete.
2. Select the **All booking from Start Date** check box to clear the bookings in the range between the dates specified in the **Start** and **End** fields.
3. In the **Start** field, choose the date that begins the range to delete. The date selector is dependent on the selected view (Day/Week/Month).
4. In the **End** field, choose the date that ends the range to delete. The date selector is dependent on the selected view (Day/Week/Month).
5. Click **Delete** to delete the bookings or **Cancel** to exit without saving.

People Planner Buttons

In addition to the embedded People Planner components—MyPlan and the Assistants—the Maconomy Workspace Client (WSC) has several buttons that relate to the integration with People Planner:

- Send Job to People Planner
- Update ETC from People Planner
- Import Working Budget from People Planner

Send Job to People Planner

It is important to realize that Maconomy and People Planner are in fact two separate applications, and that creating a job in Maconomy does not mean that it is automatically available in People Planner.

First, it must be exported.

There are two ways to export jobs from Maconomy to People Planner:

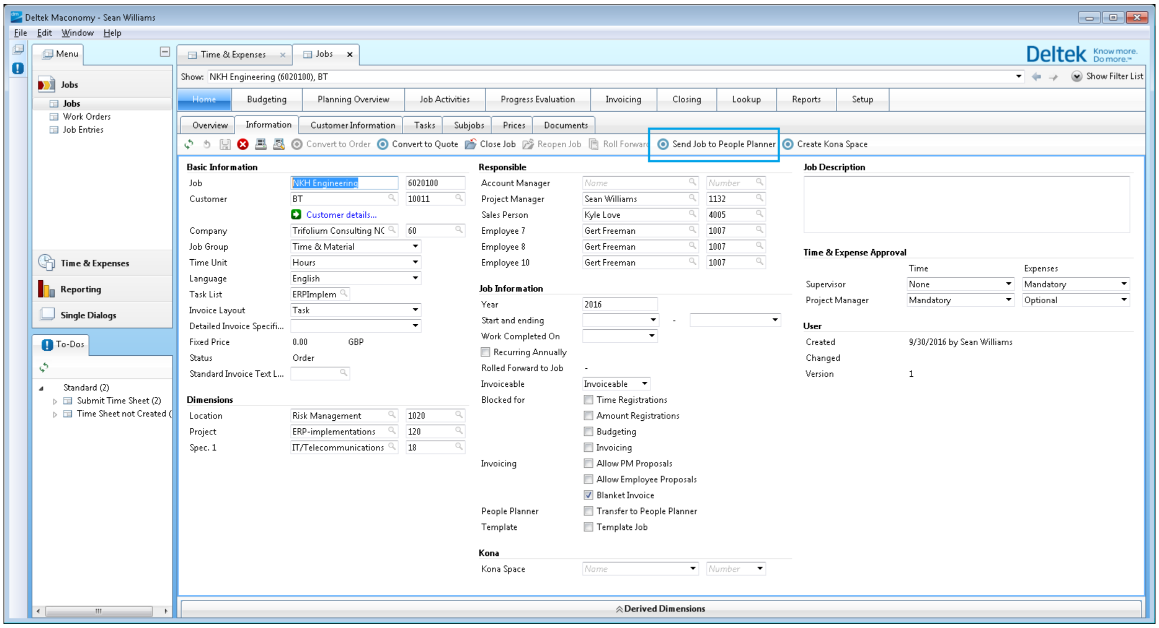
- Pushing the job from Maconomy to People Planner.
- Using a Scheduled Task running in People Planner, importing new and changed jobs.

Normally People Planner imports all of the new or changed jobs at preset times. It does this using a Scheduled Task. To avoid overloading the system, this usually happens outside of office hours.

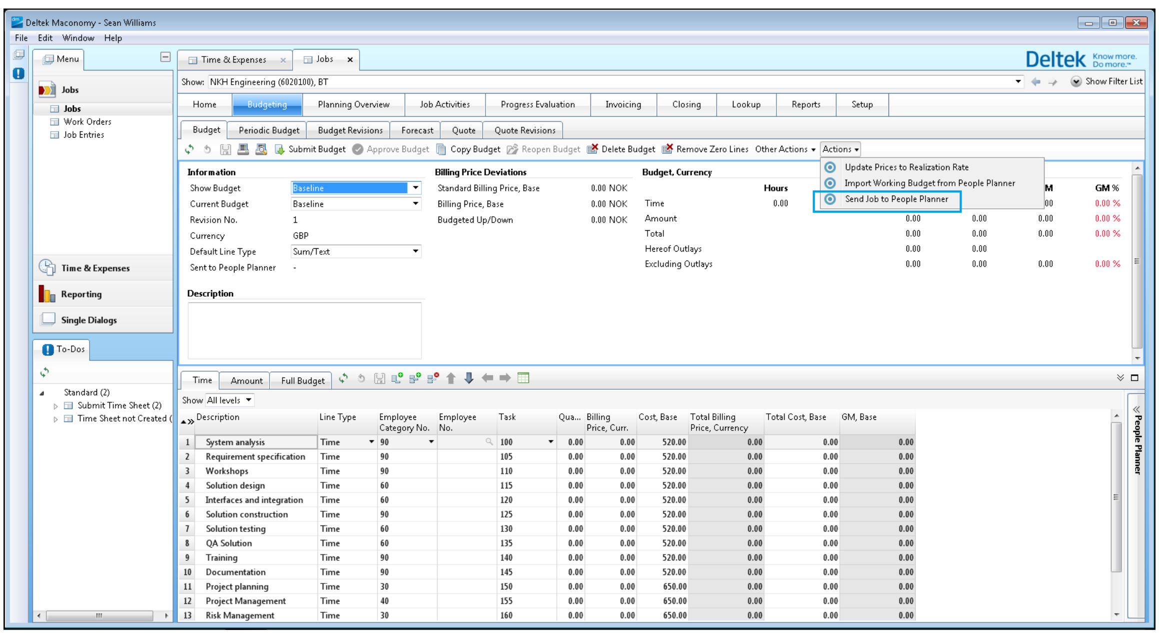
> **Note:** See the *Deltek People Planner Integrations Guide* for information about Scheduled Tasks. They are beyond the scope of this document.

If you do not want to wait for the Scheduled Task to run, and you need to have the job fully updated in People Planner, as well as in Maconomy, you can “push” the project to People Planner.

You push a job to People Planner by clicking the **Send Job to People Planner** button. This button is available in multiple locations, such as in **Jobs » Home » Information**.



You can also find this button in **Jobs » Budgeting » Budget.** This version is especially useful when you are updating the budget in Maconomy, and you also want to have it updated in People Planner.



Beginning with Maconomy 2.4, this button is also located under the Periodic Budget tab.

Note: Maconomy has a system setting, Always Allow Send Action, which is selected by default in newer versions of Maconomy. If this setting is not selected, Maconomy only allows you to push the project once. After you have done this once, the **Send to People Planner** button is disabled.

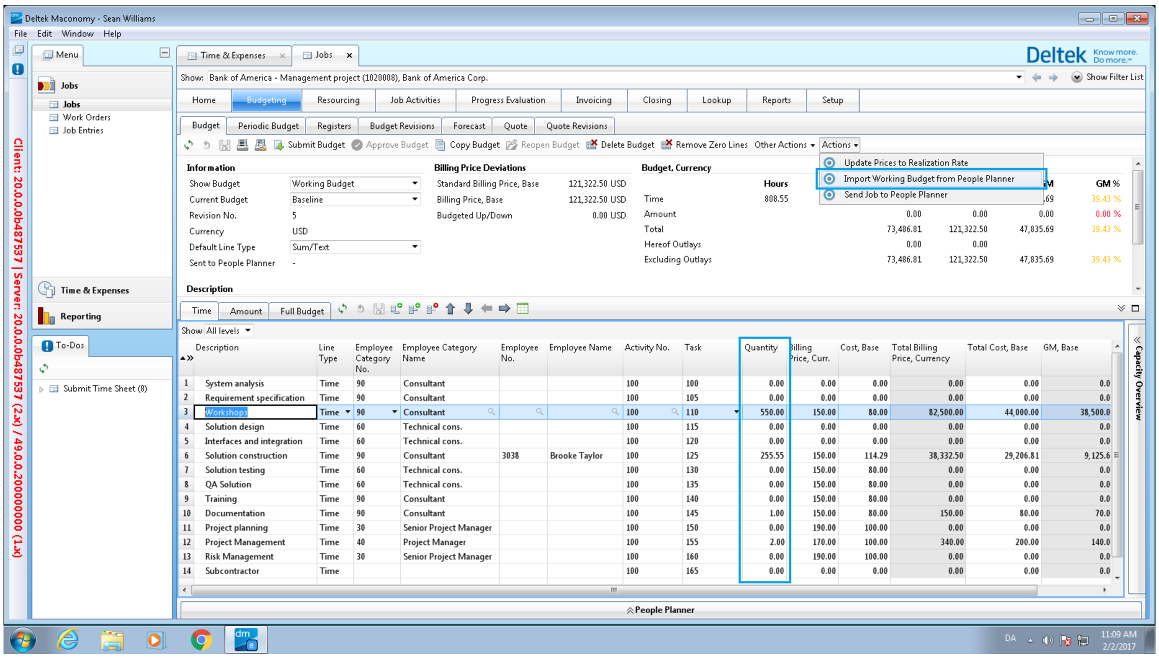
> **Note:** The Maconomy Send to People Planner feature that pushes information from Maconomy to People Planner automatically also pushes Customer and Company data if Customer and Company are required fields, and they do not exist in People Planner.

Import Working Budget from People Planner

If the working budget has been modified in People Planner, you can import the changed budget to Maconomy.

To import the changed budget to Maconomy:

1. Navigate to **Jobs » Jobs » Budgeting » Budget**.
2. Click the **Actions** menu and select **Import Working Budget from People Planner**.



The Working Budget numbers are imported into the Quantity column in Maconomy.

> **Note:** In many People Planner installations, the Working Budget column is read-only, and you cannot change the budget from there.

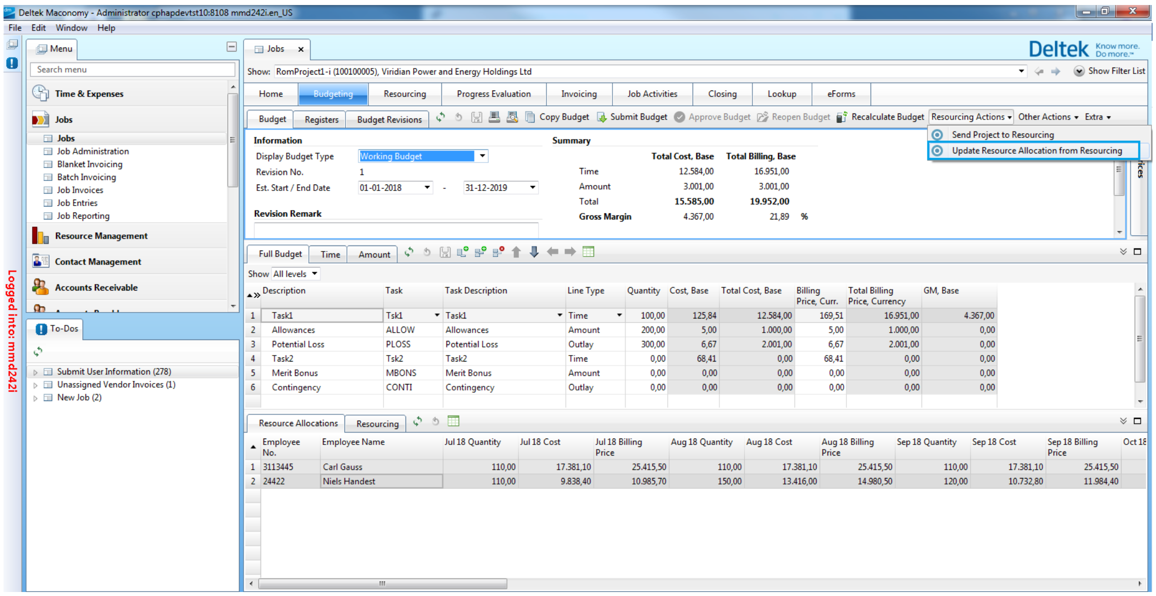
Update Resource Allocation from Resourcing

Beginning with Maconomy 2.4.2, you can import the budget periodized on individual employees. This requires People Planner 3.8.4 or newer.

To perform this import:

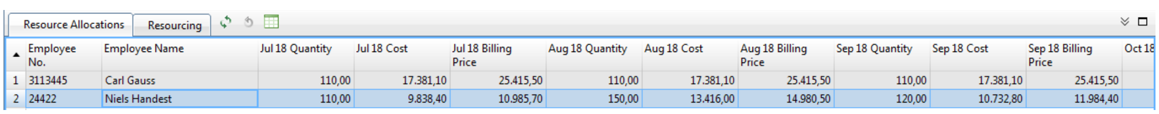
1. Open the WSC.
2. Navigate to **Jobs » Jobs**.

3. Select the job by double-clicking on it in the Job List.
4. Click the Budgeting tab, and then click the Budget tab.
5. Under the **Resourcing Actions** menu, select the **Update Resource Allocation from Resourcing**.

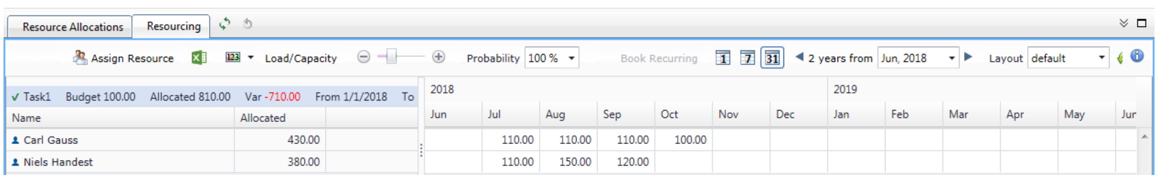


The import then runs.

The result is displayed in the **Resource Allocations** tab.



The numbers are based on the bookings in People Planner. These are aggregated on the month level and are then imported into Maconomy as the **Quantity**.



The **Cost** is then calculated by multiplying the imported Quantity by the **Cost** of the employee if it is the same company, or by the **Intercompany Price** if it is a different company.

Similarly, the **Billing Price** is calculated by multiplying the Quantity by the **Billing Price** of the employee.

Update ETC from People Planner

In addition to assigning resources on tasks, performing bookings on them is an important part of the planning for a project. When you have the bookings in People Planner, you can then use them to get an estimate of how many hours remain before the project is completed.

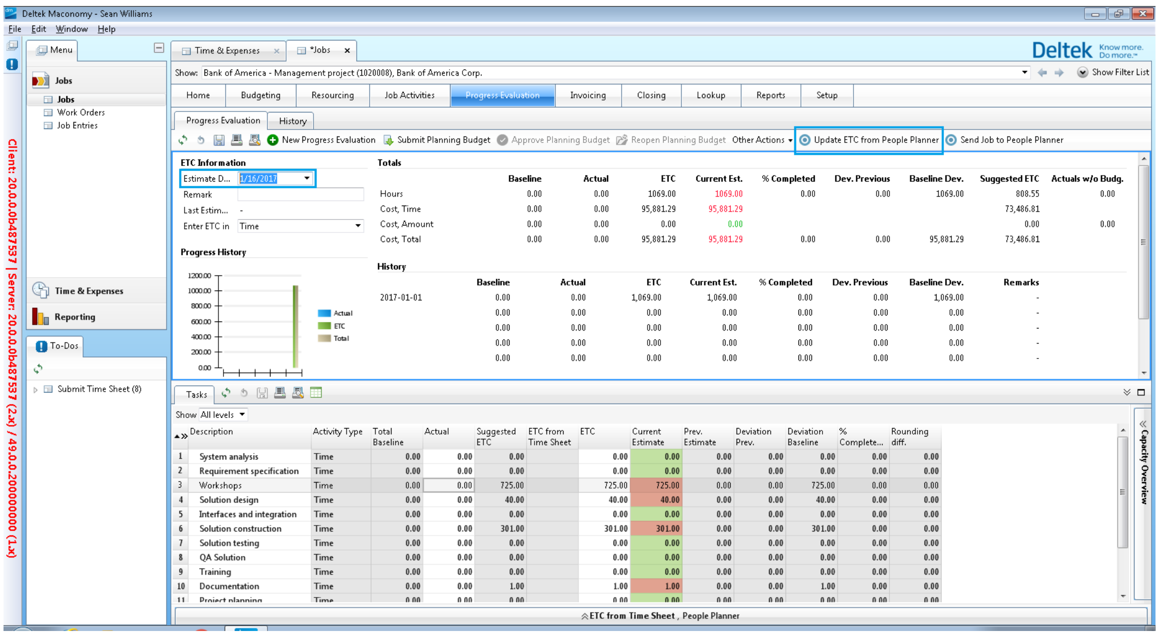
To import the Estimated Time to Complete (ETC), you must first enter a date, the Estimate Date. The import of ETCs then returns the total of the bookings in People Planner from this date until the finish date of the project. This value is interpreted to be the estimated remaining time on the project.

This generally makes sense if the Project Manager has in fact booked the resources for the remaining period of the project. This is not necessarily the case for very long projects where the Project Manager might plan for, say, the next half-year into the future, but not all the way to the end of the project.

Update the ETCS

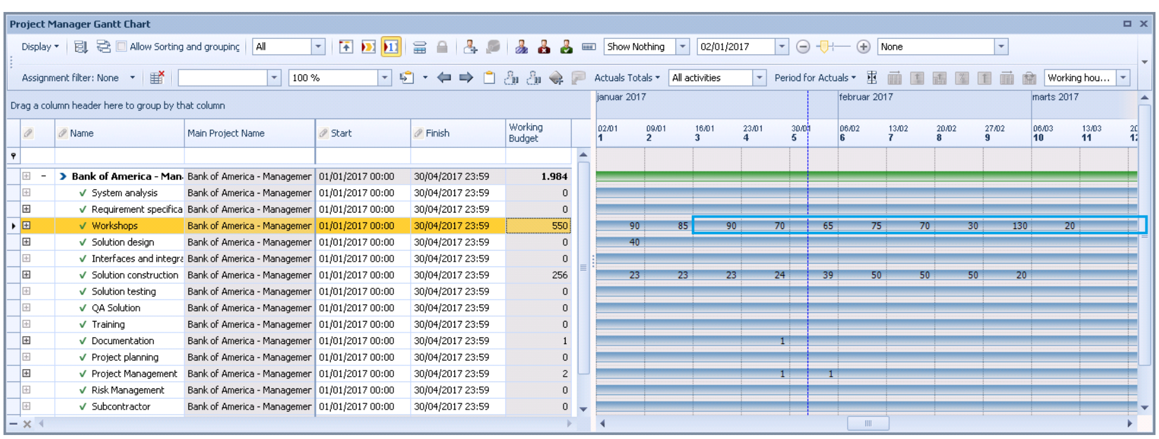
To update the ETCs:

1. Navigate to **Jobs » Jobs » Progress Evaluation**.
2. Enter a date in the **Estimation Date** field.
3. Click the **Update ETC from People Planner** button.

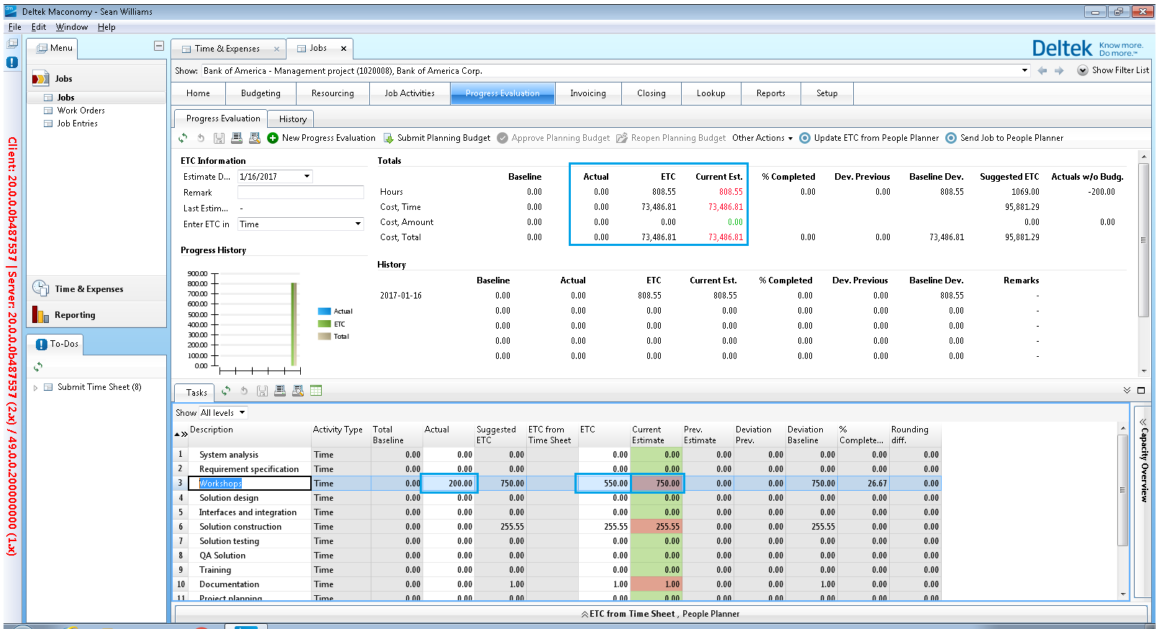


By entering a new date in the **Estimation Date** field and clicking the Update ETC from People Planner button, you can repeat this as often as you need.

When People Planner is asked to return the ETCs, it receives the estimation date. It then sums all of the bookings on and after this date and returns them to Maconomy as the ETCs. The following figure shows the Project Manager Gantt Chart in the People Planner application.



Maconomy updates its ETC column and then calculates the Current Estimate column as the sum of the Actual and ETC columns. It finally writes this sum to the Estimate column; that is, the budget is updated with the new estimated budget from the imported ETCs.



In this example, the estimation date is January 16; consider the Workshops budget line. 200 hours have already been registered on timesheets; this is the actuals. The 550 hours that are planned after the estimate date are added to the actuals. The resulting total—750 hours—is the estimated total number of hours on Workshops.

Appendix: Technical Clarifications

Because People Planner and Maconomy are separate applications, it is important to understand how they interact with each other.

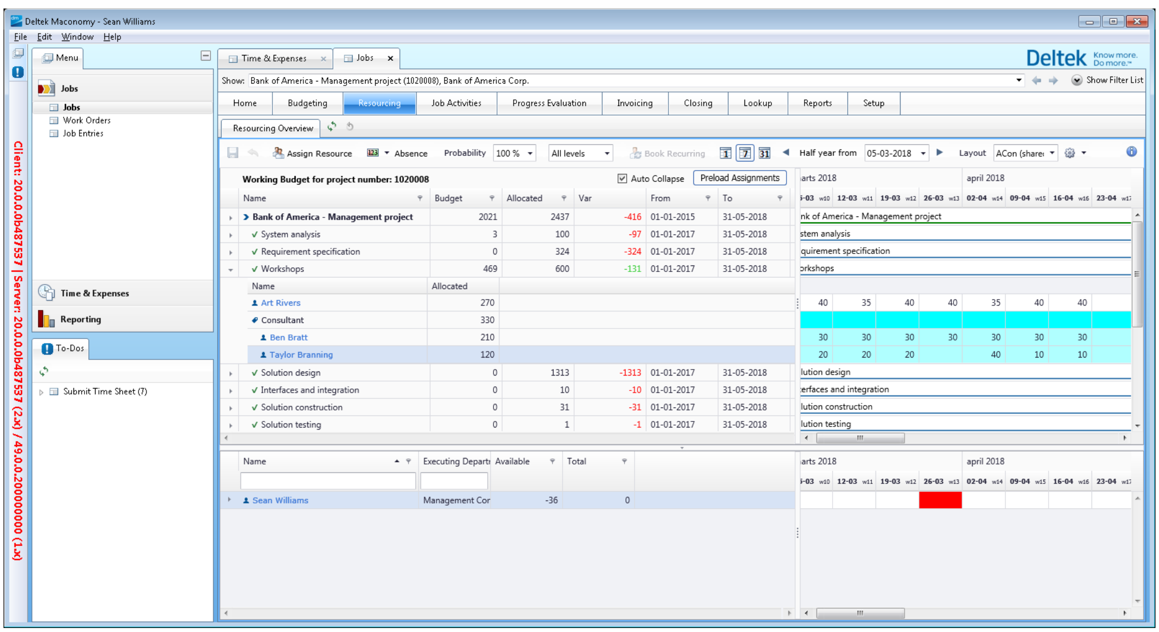
The People Planner Windows Application

There are clear parallels between the embedded People Planner Components and the People Planner Windows Application itself:

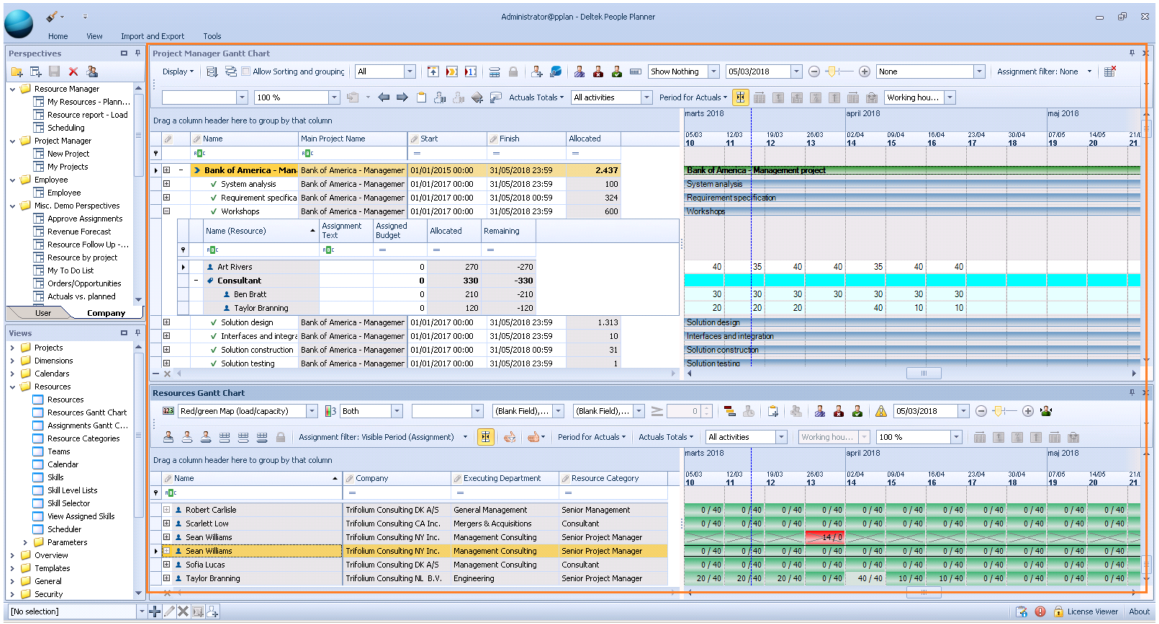
- MyPlan corresponds to the Scheduler view in the People Planner Windows Application.
- The Budgeting Assistant and the Progress Evaluation Assistant do not have direct counterparts in People Planner. They would correspond to a PG (Project Manager Gantt Chart) plus an RG (Resources Gantt Chart) that only shows the currently selected budget line.
- The Resourcing Overview corresponds to the PG and the RG combined.
- The Capacity Overview corresponds to the RG.
- The Resource Management corresponds to the RG.

The following two figures illustrate this relationship for the Resourcing Overview.

The Resourcing Overview



The People Planner Windows Application – PG over RG



The functionality in both is therefore naturally related. The following table describes some notable differences.

In the People Planner Application	In the Resourcing Overview Assistant
The PG shows as many projects as you want. You can use filters to restrict this.	The PG shows exactly one project.
The PG shows all of the sub-projects of a project. You can use filters to restrict this.	The PG shows only the project. If you want to see any of its sub-projects, you must select them individually from the Job List.
The RG shows a list of all of the resources. You can expand the assignment sub-grid of a resource to see what other tasks the resource is assigned to.	The RG shows only the resources that are assigned to the job. You can expand a resource to see the tasks to which the resource is assigned.

Synchronization

People Planner and Maconomy has each its own database. This means that any work that you do in Maconomy is not immediately available in People Planner.

Examples of this are:

- When you create a job in Maconomy, you cannot plan on it before you have exported it to People Planner.
- When you edit the budget of a job in Maconomy, and you add a new budget line, that line is not automatically available in the Budgeting Assistant.

In this case, the job in Maconomy and the project in People Planner are temporarily out-of-sync with each other.

Normally People Planner is configured to import all new or changed jobs at preset times. It does this using a Scheduled Task. To avoid overloading the system, this usually happens outside of office hours. If you do not want to wait for the Scheduled Task to run, and you need to have the job fully synchronized between People Planner and Maconomy, you can "push" the project to People Planner.

You push a job to People Planner by clicking the Send Job to People Planner button. This button is available in a few locations:

- **Jobs » Home » Information » Send Job to People Planner**
- **Jobs » Budgeting » Budget » Actions » Send Job to People Planner**
- **Jobs » Budgeting » Periodic Budget » Other Actions » Send Job to People Planner**

The last location is introduced with Maconomy 2.4.

Origin

In People Planner, you can add the Origin column in almost all of the views. This column shows you where the data was created. Data that was imported from Maconomy has this origin.

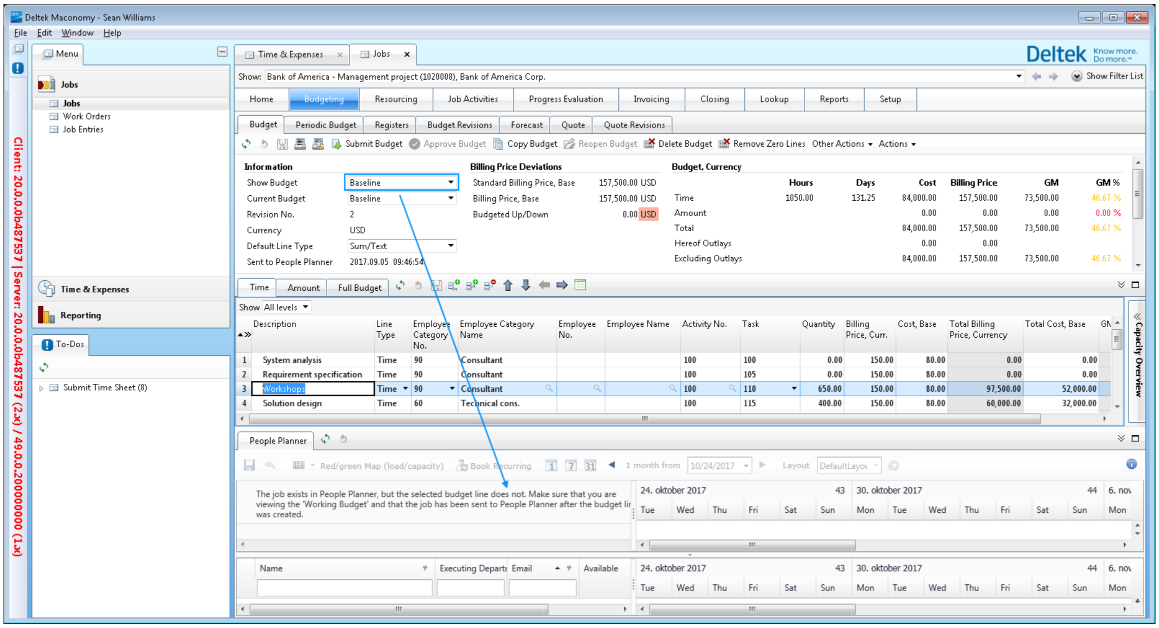
Assignments and bookings that are created through one of the People Planner Components has the origin of People Planner.

Budget Types

Maconomy supports having several budgets on a job, such as a Sales Estimate, a Baseline, a Working Budget, and so on. However, only one of these budgets is exported to People Planner. You can configure which budget it is, but the default is the Working Budget.

> **Note:** See the *Deltek People Planner Integrations Guide* for detailed information about how to configure the project export.

Because of this, you must always select to see the Working Budget when you use the Budgeting Assistant. You do this by changing the Show Budget field to Working Budget. If you have selected to see any other of the budgets, the Budgeting Assistant displays an error message.



Note: You see the same error message if you are displaying the Working Budget, but you have selected a budget line that has not been sent to People Planner, for example, because it was added after the last time that you clicked Send to People Planner.

Data Limitations

People Planner supports Data Limitations. These are restrictions that hide data from the user; there are various reasons for this:

- The user is not authorized to see the data.
- If it were unlimited the data would be too much for the application to handle in a speedy manner.
- If it were unlimited the data would overwhelm the user; it would be difficult to find the pertinent data among all the other data.

An example of a Data Limitation could be to hide all projects that are older than two years.

There are different types of Data Limitations in People Planner:

- System Data Limitations.
- Public Data Limitations.
- User Data Limitations.

For the People Planner Assistants, it is the System Data Limitations that are of relevance. Although you cannot see them anywhere in the embedded People Planner Assistants, they are still applied. A user is associated with one or more roles in People Planner. These roles are again associated with one or more System Data Limitations. These combined System Data Limitations are always in effect for the user.

Note: See the *Deltek People Planner Fundamentals Guide* for detailed information about Data Limitations.

Maconomy Roles

Maconomy 2.3 introduced the concept of roles.

Note: People Planner has a roles import, but it imports employee groups instead, which is a different concept, and one that has been in Maconomy for a long time. There is no import for Maconomy roles.

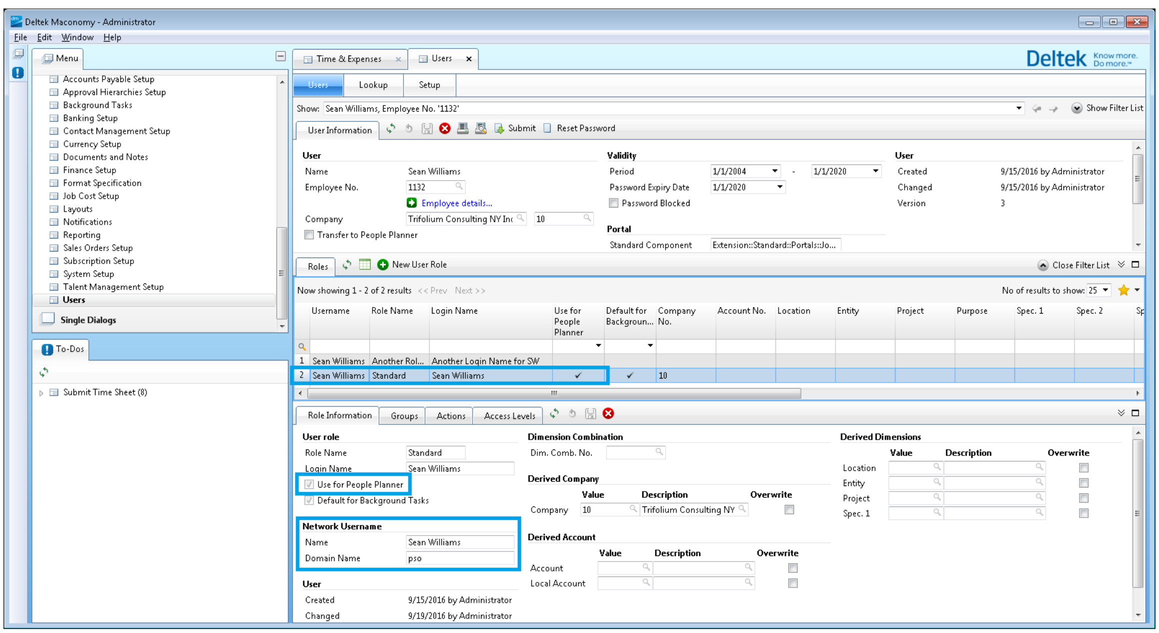
A user can have several roles to choose from, and exactly one of these roles is marked as Use for People Planner.

Find a User's Roles

To find a user's roles:

1. Log in to the WSC as **administrator**.
2. Navigate to the Users workspace via **Menu » Setup » Users**.
3. Select the user.

The Roles section displays the roles that are available to the user. In the following figure there are two roles.



The embedded People Planner Components and buttons are only available when you have selected the role marked as Use for People Planner. If you chose to log in to the WSC using a role that is not marked as Use for People Planner, the Assistants are not visible.

Manage Shared Web Layouts: Administrator Tasks

The Edit Web Page Layout privilege is typically given to Administrators. This privilege enables you to perform additional tasks related to Shared Web Layouts:

- Specify which of the available columns users can choose from in the Column Chooser.
- View all default (standard) layouts and Shared Web Layouts, as well as personal layouts.
- Use the Save and Save As function to create Shared Web Layouts.
- Use the Rename function to rename layouts.
- Use the Delete function to delete layouts.
- Link a Shared Web Layout to one or more roles using the People Planner Windows application's Roles and Data Limitations functionalities.

Create Shared Web Layouts

You can create layouts and make them available to all users or to users who have a certain role.

> **Attention:** See Link Roles to Shared Layouts.

You can base a new Shared Web Layout on either a standard layout or an existing Shared Web Layout.

> **Note:** When you create Shared Web Layouts, each column that you add as an available column has an impact on performance. Deltek therefore strongly recommends that you include in Shared Web Layouts only those columns that users need.

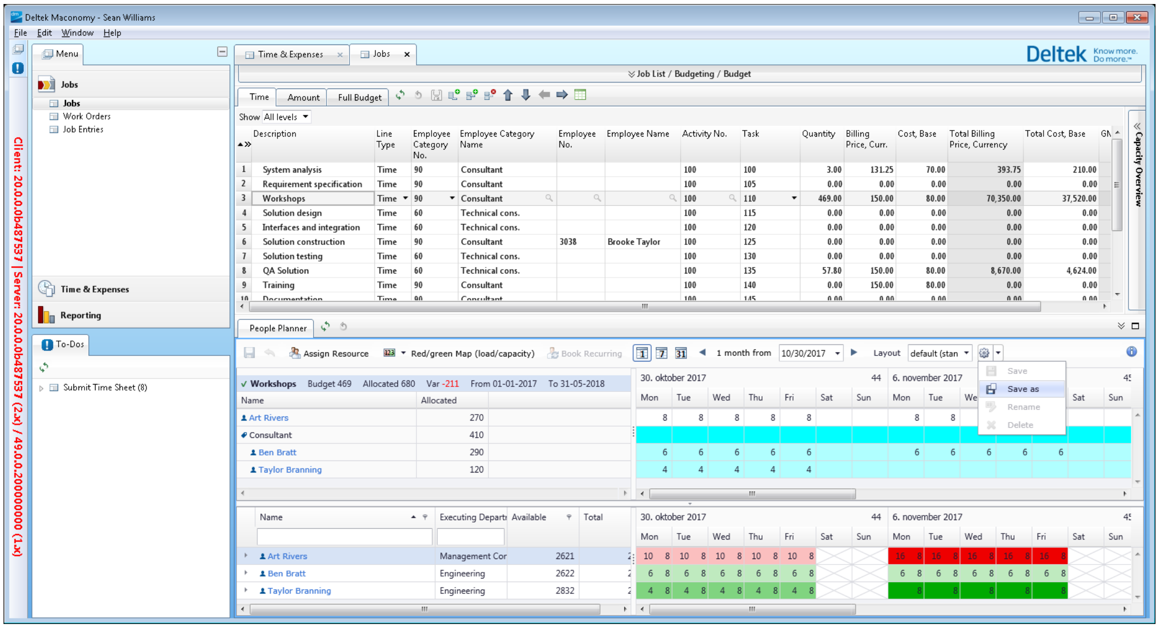
> **Tip:** To ensure that users do not create personal layouts that adversely affect performance because they include unnecessary columns, you can prevent users from choosing layouts in which all columns are available.
>
> In the Admin Tool, in the Settings tab, under System Settings » Web Component Settings, ensure that the **Allow personal version of standard layout** check box is cleared. This prevents users from seeing these layouts in the menu from which they can choose layouts to personalize.

To create a Shared Web Layout:

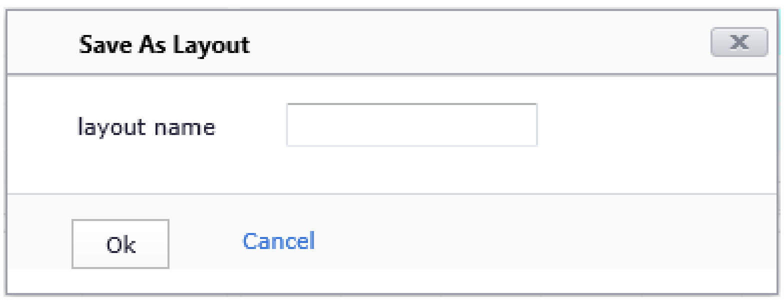
1. Navigate to the layout on which you want to base the shared layout that you are creating.
2. Customize the layout by following the steps in Add Columns, Remove Columns, Sort on a Column, and/or Group on Columns.

   > **Note:** If you are editing a shared layout and you click Save to save your changes, all existing personal layouts that were based on that shared layout are deleted. A warning message is displayed first.

3. Click the drop-down arrow next to the Layouts icon next to the Layout field.



4. Choose **Save as** from the drop-down list.

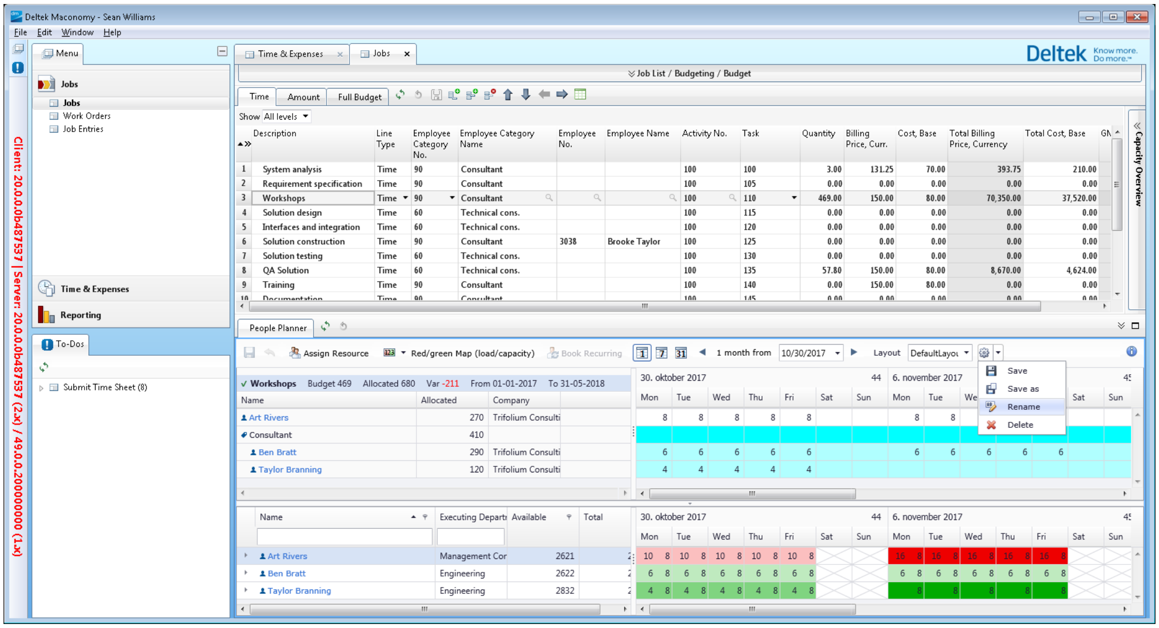


5. On the Save As Layout dialog box, enter a name for the shared layout and click **Ok**.

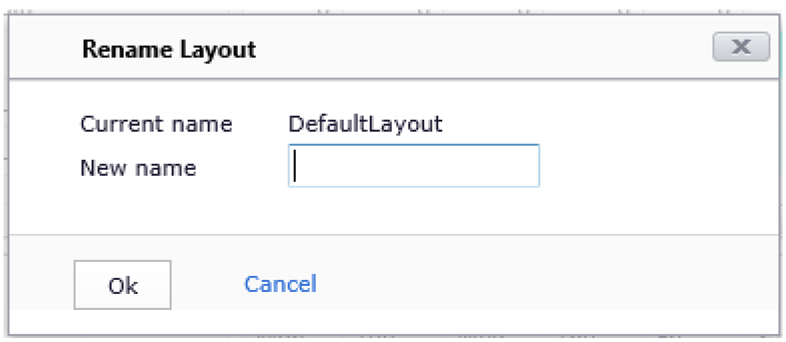
Rename Shared Web Layouts

To rename a Shared Web Layout:

1. Navigate to the layout that you want to rename.
2. Click the drop-down arrow next to the Layouts icon next to the **Layout** field.



3. Choose **Rename** from the drop-down list.



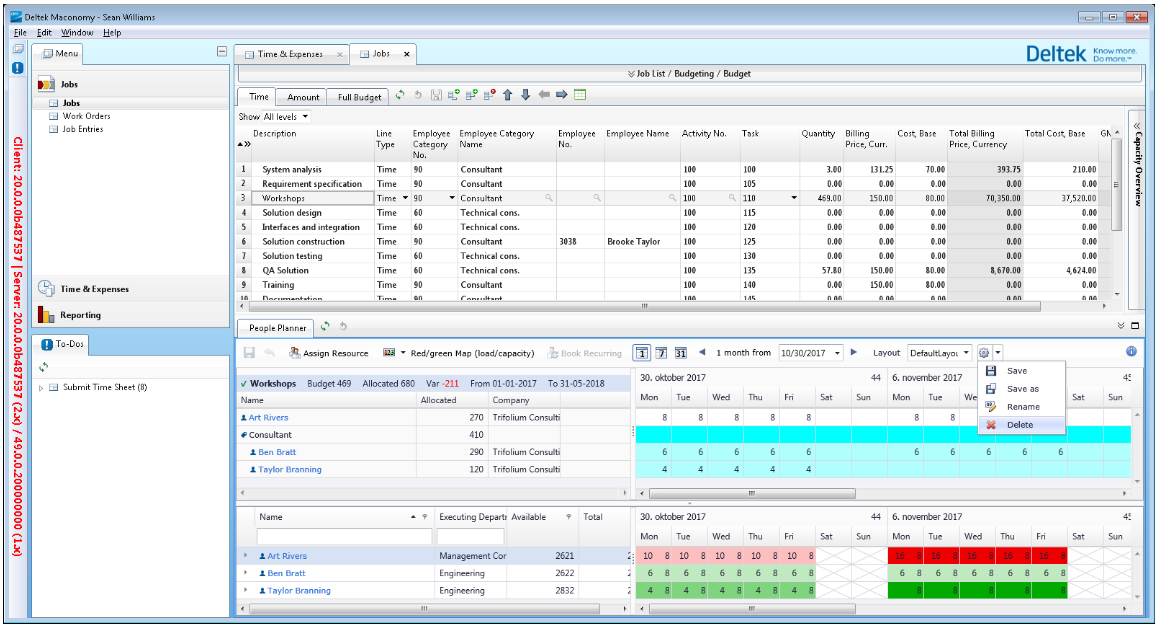
4. On the Rename Layout dialog box, enter a new name for the layout and click **Ok**.

Delete Shared Web Layouts

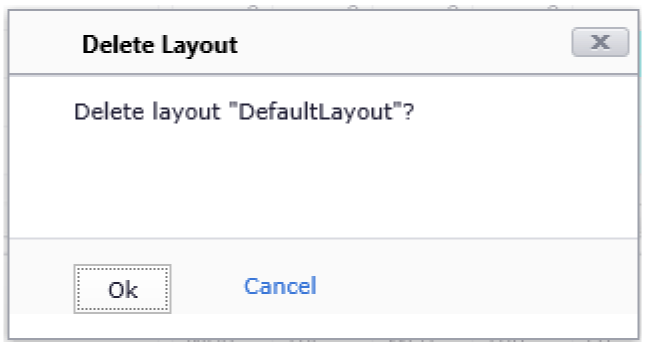
To delete a Shared Web Layout:

1. Select the shared layout that you want to delete.

2. Click the drop-down arrow next to the Layouts icon next to the **Layout** field.



3. Choose **Delete** from the drop-down list.



4. On the Delete Layout dialog box, click **Ok**.

   If there are no personal layouts based on the shared layout, and no roles are associated with it, the layout is deleted when you click **Ok**.

Import and Export Shared Web Layouts

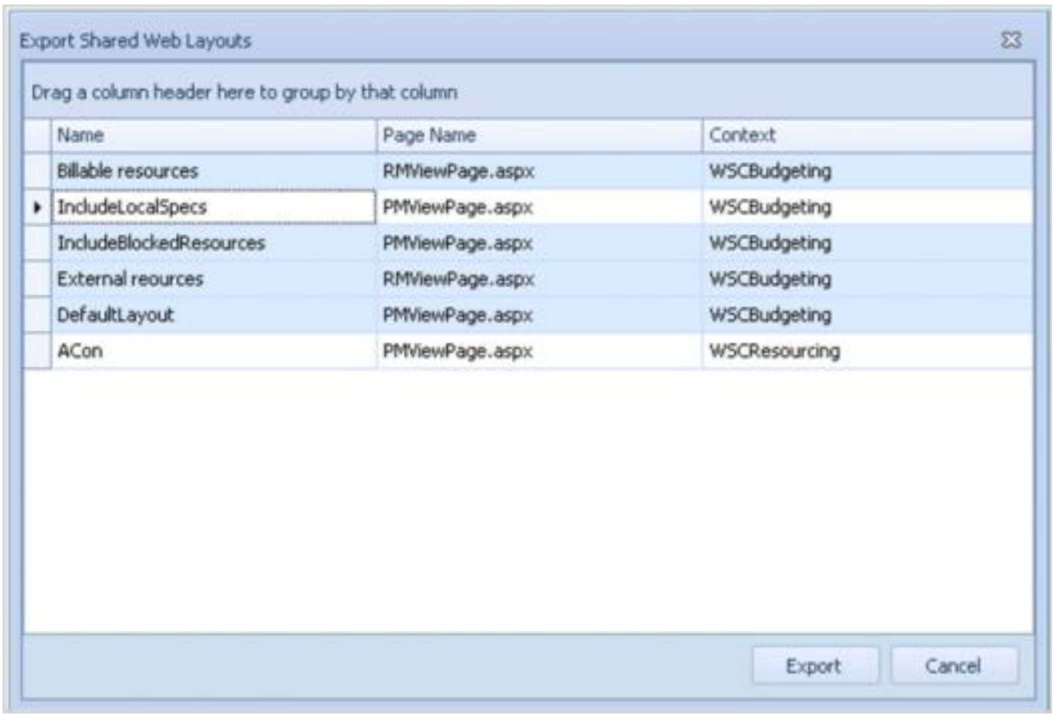
Using the People Planner Windows Application, you can import and export Shared Web Layouts.

Export Shared Web Layouts

To export a Shared Web Layout:

1. Launch the Windows Application.
2. Click the **Export Web Layouts to File** button in the toolbar.

   A dialog box displays a list of existing Shared Web Layouts that you can choose to export. All Shared Web Layouts are selected by default.

   Choose one or more Shared Web Layouts to export to a file.

   Tip: You can use Ctrl+Shift to choose multiple Shared Web Layouts or Ctrl+A to choose all of the Shared Web Layouts in the list.

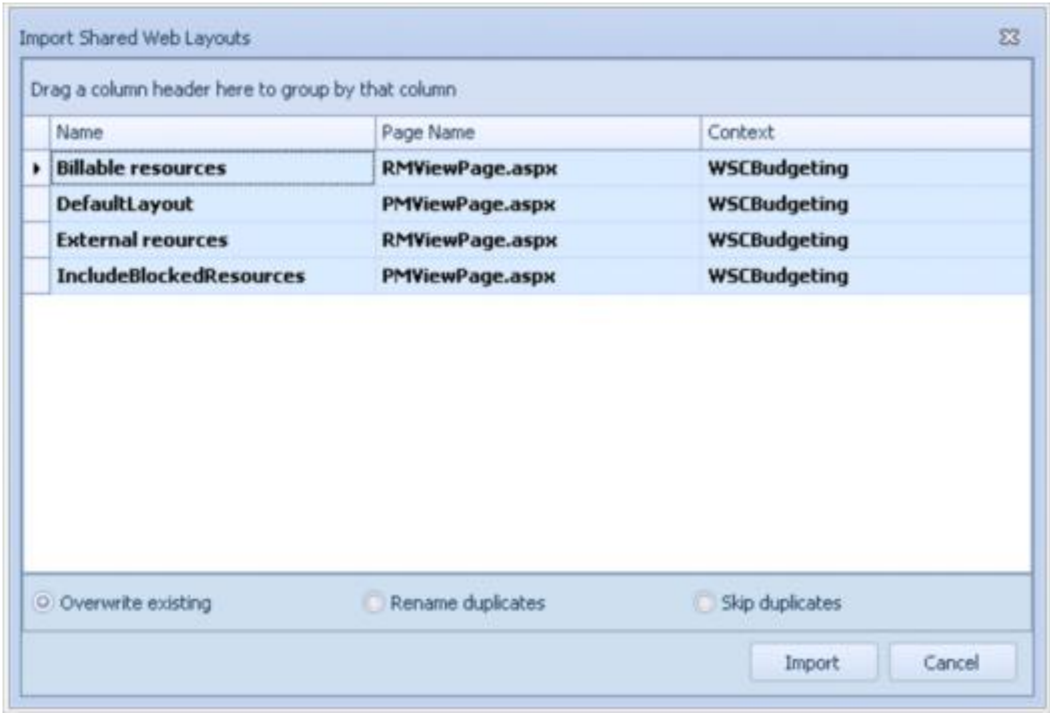
3. Click **Export**.
4. In the Windows Save as dialog box, navigate to the location where you want to save the Shared Web Layout(s) if needed and click **Save**.

Import Shared Web Layouts

To import a Shared Web Layout:

1. Launch the Windows Application.
2. Click the **Import Web Layouts from File** button in the toolbar.
3. In the Windows (File) Open dialog box, navigate to the location where Shared Web Layouts are stored, if needed.
4. Select a Shared Web Layout file and click **Open**.

If you clicked on the name of a previously exported Shared Web Layouts file, a dialog box like the following example displays all of the Shared Web Layouts that are contained in that file. All Shared Web Layouts that are contained in the file are selected by default.



If a Shared Web Layout that has the same combination of **Name**, **Page Name**, and **Context** values already exists in your People Planner system, they are bolded in this list.

If you choose an existing Shared Web Layout, use the radio buttons to indicate how you want the import to be performed:

- **Overwrite existing:** Overwrites the existing Shared Web Layout with the imported one.
- **Rename duplicates:** Appends a sequential number to the name of the Shared Web Layout when it imports, increasing that number (if needed) until the name becomes unique.
- **Skip duplicates:** Does not import the Shared Web Layout.

5. Click **Import**.

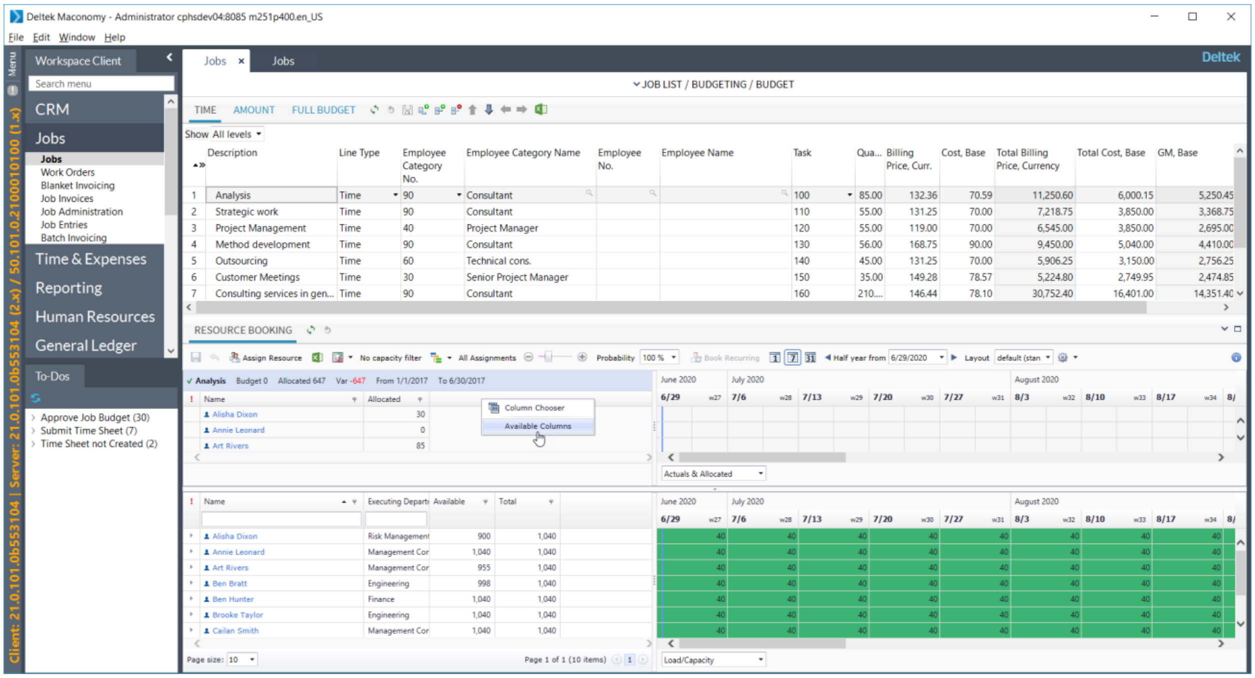
Specify Available Columns in the Column Chooser

You can customize the Web Components to display the columns that are useful to you. Note that you must use a layout that allows editing of the columns, such as the default (standard) layout.

To specify the columns that users see in the Column Chooser:

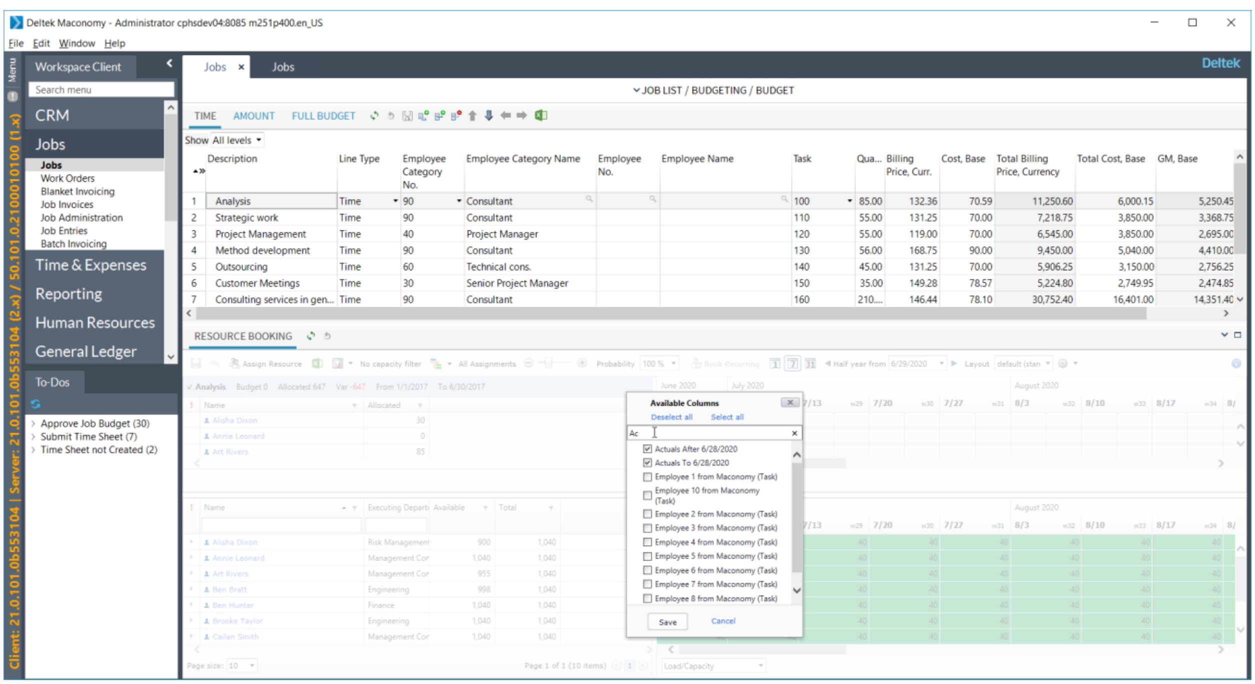
1. Navigate to the Web Components display for which you want to specify the columns that are available to users in the Column Chooser.

2. Right click on a column header.



3. Choose **Available Columns** from the shortcut menu.

4. Type in the filter text box and select the check box(es) for the column(s) that should appear in the Column Chooser for all users.



5. Click **Save**.

Link Shared Web Layouts to Roles

You can link a shared layout to one or more roles using the People Planner Windows application's Roles and Data Limitations functionality. As a result of linking a shared layout to a role, you can assign users who have that role the ability to access that shared layout.

The following example shows how an example *IncludeBookedResources* shared layout is associated with an example *Project Manager* role. Assigning the Project Manager role to *Kyle Love* enables this user to access the *IncludeBookedResources* layout.

Link a Role to a Shared Web Layout

To link a role to a Shared Web Layout:

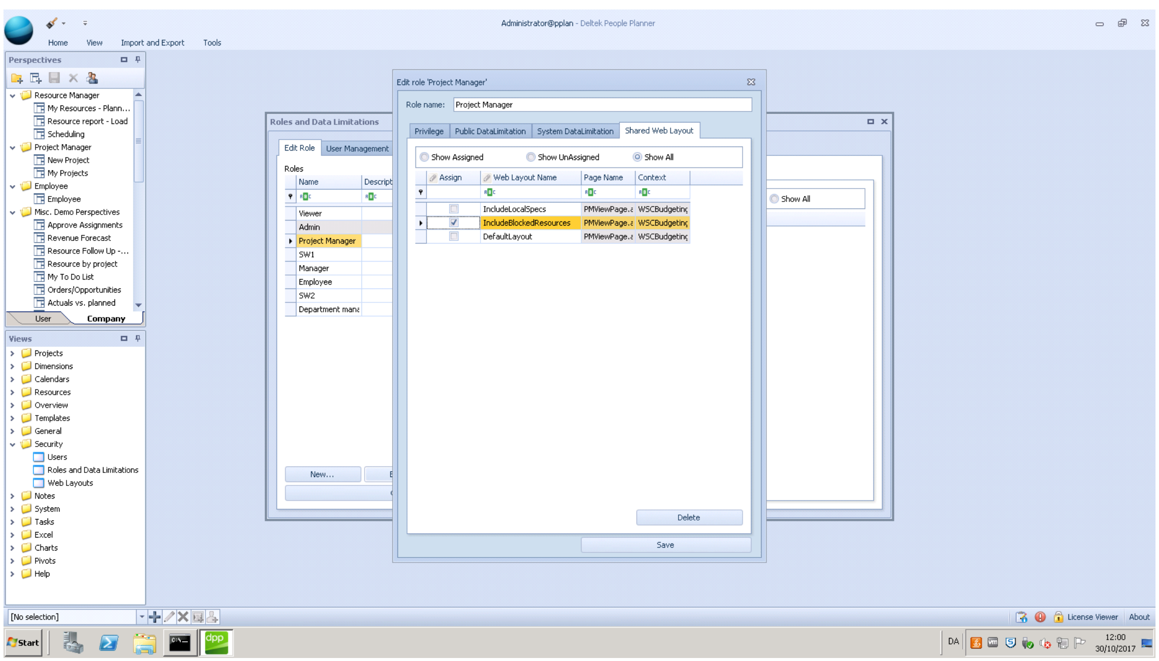
1. Navigate to **Views » Security » Roles and Data Limitations » Edit Role tab**.

   The Edit Role tab lists the existing roles.

2. Select the role with which you want to associate the layout and click the **Edit…** button.

   The Edit role <role name> dialog is displayed. The following figure shows the display for the example *Project Manager* role.

3. Select the **Show All** radio button.



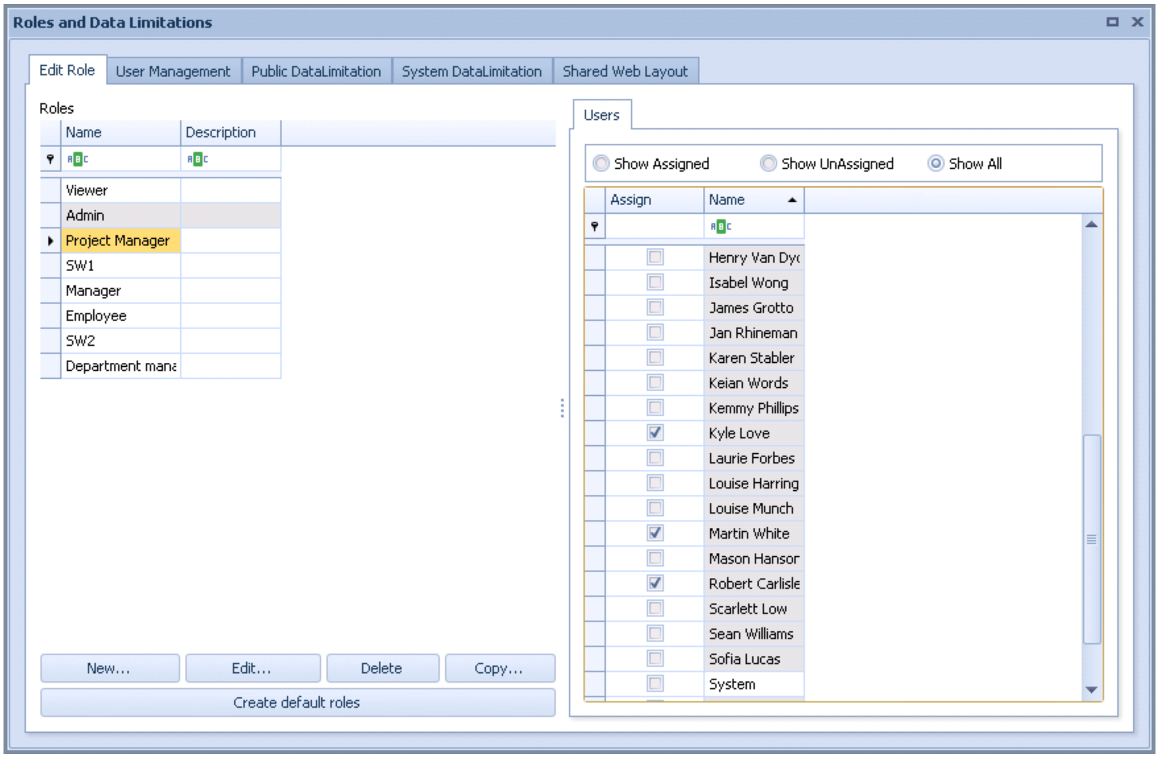
1. In the Shared Web Layout tab, select the **Assign** check box for the shared layout or layouts that a user who has this role should be able to access.
2. Click **Save**.

Assign a Role to a User

To assign a role to a user:

1. Select the Edit Roles tab.
2. In the Users tab, select the **Show All** radio button.

3. Select the **Assign** check box(es) for the users you want to assign to the role.



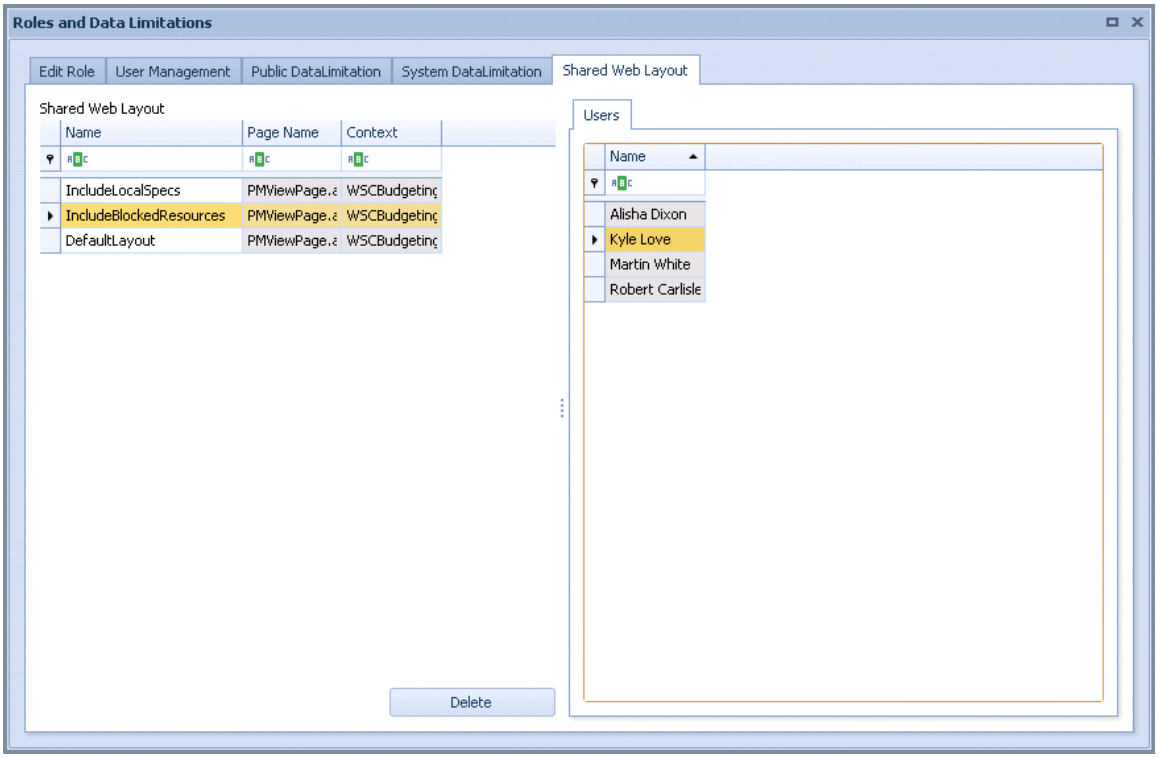
Tip: See the *Deltek People Planner Fundamentals Guide* for more information about how to work with roles in People Planner.

View Shared Web Layouts and Users Who Can Access Them

To view a list of Shared Web Layouts and the users who can access those layouts through their assigned roles:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the Shared Web Layout tab.

3. Select the layout that you want to inspect.



The list of Shared Web Layouts appears in the Shared Web Layout pane, and the list of users who have access to those layouts appears in the Users pane.

This example shows that user Kyle Love can access the IncludeBlockedResources Shared Web Layout.

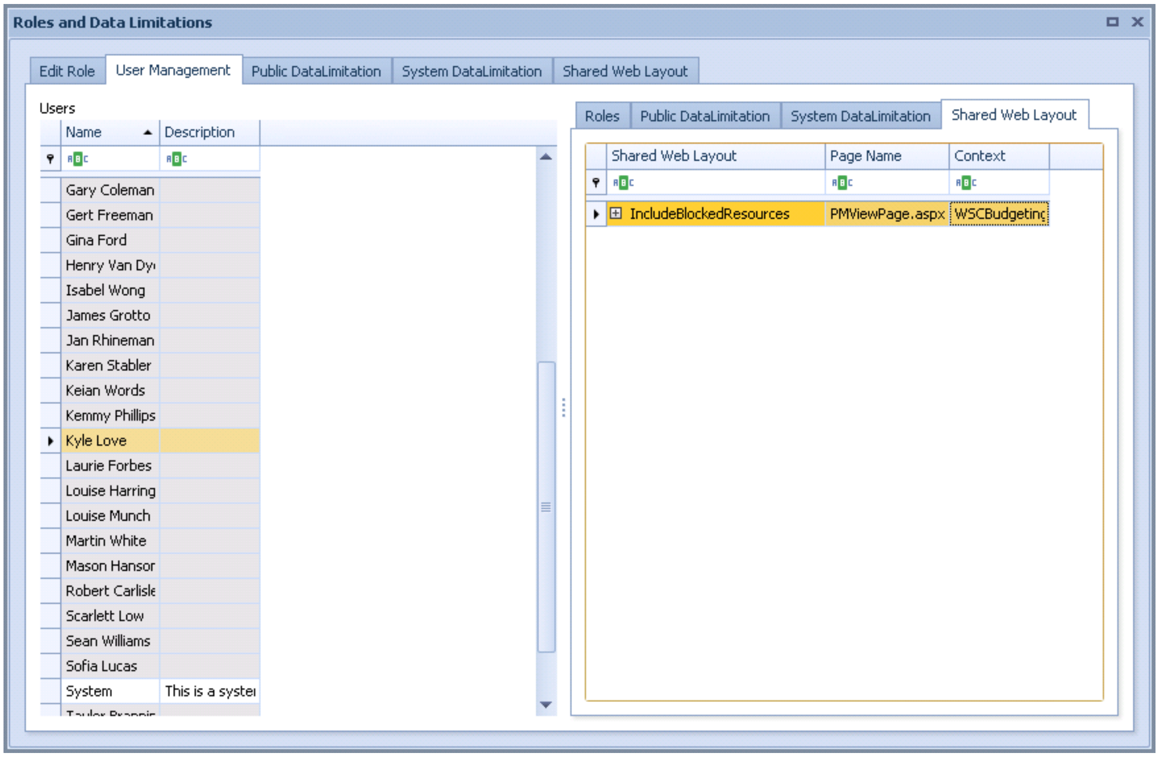
View Users and the Shared Web Layouts They Can Access

You can also use the User Management tab to view users and the Shared Web Layouts that they can access.

To view users, Shared Web Layouts, and the role(s) that are linked to those layouts:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the User Management tab.
3. Select the user's name in the Users pane.
4. Click the Shared Web Layout tab in the right-hand pane.

The following figure shows that because the example user Kyle Love has the *Account Management WSC* role, and that role is linked to the example *PG/RG Account Manager* Shared Web Layout, he has access to this Shared Web Layout.



View Existing Layouts

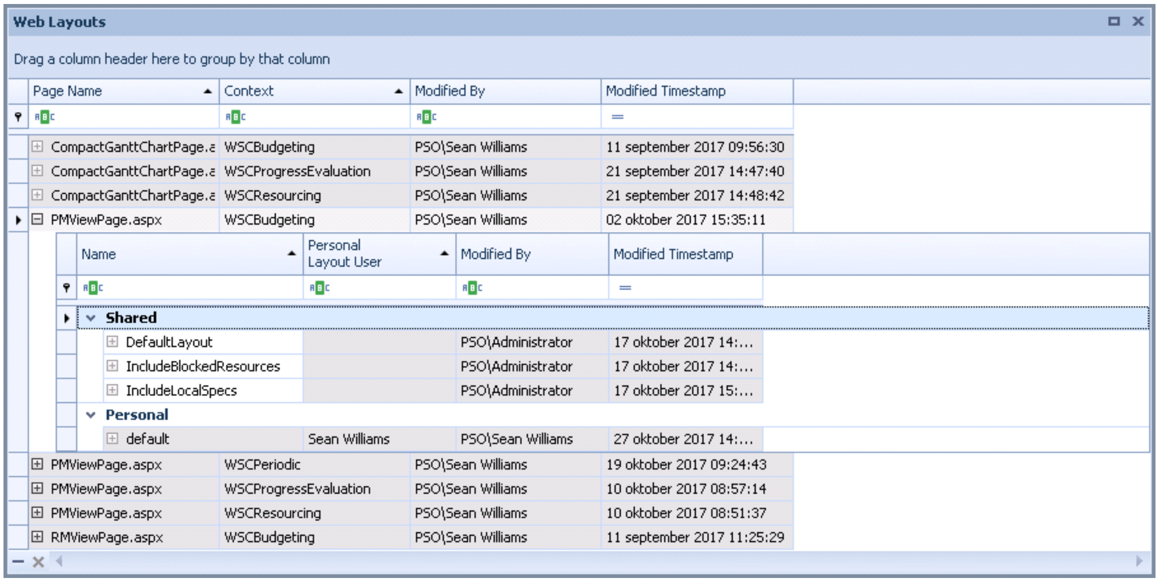
You can use the Web Layouts view to see an overview of all existing layouts, including personal layouts.

> **Note:** You must have the Web Layouts privilege to use the Web Layouts view. Your Administrator assigns this privilege.

To see a list of all existing layouts:

- Navigate to **Views » Security » Web Layouts**.

The following figure shows an example.



The main grid displays all of the default (standard) layouts. You can expand a default (standard) layout to see all of the shared layouts that have been created based on it. You can expand a shared layout to see all of the personal layouts that have been created based on it.

You can delete any layout using the Delete key on your keyboard or the button in the bottom-left corner of the Web Layouts view. When you delete a default (standard) layout, all shared and personal layouts that are based on it are also deleted. When you delete a shared layout, all personal layouts that are based on it are also deleted.

Tip: You can delete standard layouts, shared layouts, and personal layouts. When you do, all layouts based on the deleted layout are also deleted.

If you delete a standard layout, it is automatically recreated the first time that a user visits the page in the People Planner Web Component.

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