Deltek

Deltek People Planner 4.7

Web Admin Tool Guide

December 20, 2024

While Deltek has attempted to verify that the information in this document is accurate and complete, some typographical or technical errors may exist. The recipient of this document is solely responsible for all decisions relating to or use of the information provided herein.

The information contained in this publication is effective as of the publication date below and is subject to change without notice.

Contents

Overview

The People Planner Web Admin Tool is where you perform most of the administrative tasks related to configuring a People Planner system. You can also manage various settings regarding People Planner functionality.

Most of the configuration changes that can be made in the Web Admin Tool require a restart of the website, in order for the changes to reflect in the Web Components. This restart cannot be done from the Web Admin Tool, but requires access to the IIS Manager application.

Configuration

If the Deltek People Planner Web Applications installer is used to install the People Planner Web components (including the Web Admin Tool), it must be manually configured.

The Web Admin Tool utilizes Maconomy credentials/authentication for user access and hence must be configured with both the URL for the Maconomy System and URL for the People Planner RestAPI. After installing the Web Admin Tool, these URLs are configured in the Appsettings.production.json configuration file:

"MaconomyRestAuthJwt": `https://<MaconomySystem>:<PortNumber>/maconomy-api/auth/v1/<Maconomy shortname>/people-planner-jwt,`

"PeoplePlannerRest": `http://<PPSystem>:<PortNumber>/restapi/api,`

Expiration, Lifetime, and Settings

After successful authentication, the application creates a server side authentication cookie that holds an encrypted authentication ticket.

There are a few different settings for controlling the cookie and token expiration.

AuthCookieSlidingEpirationInMinutes:

This appSettings setting controls the lifetime of the cookie. If the client does not contact the server, the authentication cookie will expire and get deleted after AuthCookieSlidingEpirationInMinutes minutes. The expiration time is "sliding", meaning that whenever the client does contact the server, the cookie expiration is extended to another AuthCookieSlidingEpirationInMinutes minutes. If no other measurements were in place, this would mean that the client could keep refreshing the cookie indefinitely!

AuthTokenHardExpirationInMinutes:

To prevent the client from refreshing the cookie indefinitely, the AuthTokenHardExpirationInMinutes setting acts a maximum lifetime for the cookie. Even if the client tries to refresh the cookie, by making periodic requests to the server, the cookie (authentication ticket) will get rejected after AuthTokenHardExpirationInMinutes minutes and the cookie will get deleted.

JWT Expiration:

The authentication ticket (saved in the cookie) holds a People Planner JWT. This JWT has its own expiration timestamp. This means that even with the abovementioned mechanism of refreshing the cookie, the JWT will still expire and is not affected by the cookie refresh.

The lifetime of the JWT is controlled by the Maconomy coupling service security configuration. To change the JWT expiration of the token issued by Maconomy, edit the coupling service security configuration. Note that the coupling service must be restarted for the change to take effect.

Home

This window shows basic information about the system, such as the version number and database name.

You can view the version history of your People Planner system, including the release version, release build, upgrade date, and the user who modified the system.

You can also delete Web Admin cookies.

Booking Categories

You can create and manage booking categories in this window.

Booking categories are intended to protect a booking against being changed by someone else. The booking category does not actively prevent anyone from changing a booking, but it can be configured to issue a warning if someone attempts to do so.

Add a Booking Category

Use these steps to add a booking category.

To add a booking category:

1. Go to the Booking Categories window.
2. Click **+Add**.
3. In the dialog box that displays, enter information in the fields as needed.
4. Click **Save**.

Edit a Booking Category

Use these steps to edit a booking category.

To edit a booking category:

1. Go to the Booking Categories window.
2. Select the booking category you want to edit.
3. Click **Edit**.
4. In the dialog box that displays, edit the fields as needed.
5. Click **Save**.

Delete a Booking Category

Use these steps to delete a booking category.

To delete a booking category:

1. Go to the Booking Categories window.
2. Select the booking category you want to delete.
3. Click **Delete**.
4. In the confirmation dialog box that displays, click **Delete** to confirm deletion or **Cancel** to exit without deleting.
5. Click **Save**.

Roles

You control what a user has access to in People Planner through the roles you assign to them.

Add a Role

Use these steps to add a role.

To add a role:

1. Go to the Roles window.
2. Click **+Add**.
3. Enter a name and description for your role.
4. Click **Save**.

Edit a Role

Use these steps to modify a role.

To edit a role:

1. Go to the Roles window.
2. Click on the role you want to edit.
3. Click **Edit**.
4. Modify the name or description as needed.
5. Click **Save**.

Delete a Role

Use these steps to delete a role.

To delete a role:

1. Go to the Roles window.
2. Click on the role you want to delete.
3. Click **Delete**.
4. In the confirmation dialog box that displays, click **Delete** to confirm deletion or **Cancel** to exit without deleting the role.

Manage Roles

You can manage a role for different purposes in this window.

This includes:

- Assign the role to users.

- Edit the privileges of the role.

- Associate the role with one or more public data limitations.

- Associate the role with one system data limitation.

- Associate the role with one or more Web layouts.

The way in which you define data limitations is described in Data Limitations. This section only covers how you associate data limitations with a role.

Users Tab

Use this tab to add users to a role.

> **Note: This tab differs in functionality from the Users window in the main menu.**

To assign a user to a role:

1. Go to the Roles window.
2. Click on a role.
3. Click **...Manage**.
4. In the Users tab, drag and drop users from the **Unassigned** column to the **Assigned** column.
   The system automatically saves your changes.

Privilege Tab

Most privileges are simple settings that control access or management of data in People Planner.

Privilege: Edit Projects where You are not Project Manager
This is a more advanced setting and is described in detail here.

Use this privilege to prevent project managers from making changes to projects for which they are not the project manager.

This privilege is implements as follows:

- A project can only be edited by its Project Manager or its main project's Project Manager or by a substitute project manager.

- A user who is not the Project Manager for a specific project cannot edit that project unless they have this privilege explicitly granted.

Edit a Privilege

Use this tab to choose which privileges are enabled for a role.

To edit the privileges of a role:

1. Go to the Roles window.
2. Click on the role you need to edit.
3. Click **...Manage**.
4. On the Privilege tab, select or deselect the privileges.
5. Click **Save**.

Data Limitations Tabs

You can manage the data access for a specific role by using public and/or system data limitations.

To assign a public or system data limitation to a role:

1. Go to the Roles window.
2. Click on a role.
3. Click **...Manage**.
4. In the Public Data Limitations tab or System Data Limitations tab, drag and drop limitations from the **Unassigned** column to the **Assigned** column.
   The system automatically saves your changes.

Associate Roles with Data Limitations

You can apply the same set of public or system data limitations to several users.

To apply this to a group of users, you can define a role and assign users to the role, then assign data limitations to the role.

Assigning a public or system data limitation indirectly to a user through a role requires two steps:

- Assigning the user to the role in the Users tab.
- Assigning the public or system data limitation to the role in the Public Data Limitations and/or System Data Limitations tabs under Manage Roles.

Note: You can only assign a single system data limitation to a role. If you have already assigned one system data limitation, and you then assign another, the first is unassigned. You can assign as many public data limitations to a role as you want.

Note: You can assign as many roles to a user as you want, and by doing this you can assign more than one system data limitation to a user.

Deltek

Shared Web Layouts Tab

Administrators can create shared web layouts in the Web Components and make them available to all users, or only to users with a specific role. Use this tab to link a shared web layout to one or more roles.

To associate a shared web layout with a role:

1. Go to the Roles window.
2. Click on a role.
3. Click **...Manage**.
4. In the Shared Web Layouts tab, drag and drop web layouts from the **Unassigned** column to the **Assigned** column.
   The system automatically saves your changes.

Data Limitations

The purpose of a data limitation is to limit the amount of data that is displayed in a view.

There are several uses for this, as the following table illustrates.

Area	Problem	Solution
Security	Not all users are allowed to see all data. For example, legislation often dictates that absence due to illness may not be visible to just anyone.	The administrator can define one or more system data limitations that limit the data that is displayed. The data limitations can then be applied to a role.
Usability	If a view displays all the data, it can be difficult for a user to locate the data that he or she is currently working with.	The administrator can create one or more public data limitations for users to choose from.
Performance	If a view must load a lot of data, this can result in long load times.	By limiting the amount of data that must be loaded and shown, the view loads faster.
Memory	There may simply be too much data for the view to display; that is, the application runs out of memory before the view has opened.	By limiting the amount of data that must be loaded, the view takes up less memory.

The following table describes the available data limitations:

Data Limitation	Description
System Data Limitation	The administrator defines this type of data limitation. The purpose is to limit the data that users are allowed to see. The users cannot choose between the system data limitations, and they cannot choose not to apply them.
Public Data Limitation	The administrator creates the public data limitations, but users can choose whether to apply them or not.

General Tab

When you select a public or system data limitation and edit it, this tab shows its name, description, and kind of data limitation. You can edit the name or description.

Project Limitation Tab

This section describes the specialized filters related to project limitations.

Expression	Description
Projects where I am project manager	Displays only the projects that have the logged-in user assigned as the Project Manager.
Projects where I am account manager	Displays only the projects that have the logged-in user assigned as the Account Manager.
Projects where the main projects company is my company	Displays only the projects that are done by the company where the logged-in user works. Projects that are done by another company, such as a subcontractor, are not displayed.
Projects where the main projects department is my department	Displays only the projects that are done by the responsible department where the logged-in user works.
Projects where the main projects business area is my business area	Displays only the projects that have the same business area as the logged-in user.
Projects where the main projects specification2 is my specification2	Displays only the projects that have the same specification2 area as the logged-in user. You can use the specification2 field for customization.
Projects where the main projects specification3 is my specification3	Displays the same information as for specification2.
Projects where my resources are assigned	Displays only the projects where at least one of the employees of the logged-in user's resources has been assigned.

Resource Limitation Tab

This section describes the specialized filters related to resource limitations.

Expression	Description
Resources where I am resource manager	Displays only the employees of the logged-in user.
Resources with same company as my company	Displays only the resources who work in the same company as the logged-in user.
Resources with same department as my department	Displays only the resources who work in the same department as the logged-in user.
Only the logged on resource	Displays only the logged-in user.

Field Based Limitations in Project/Resource Limitation Tabs

For the most part, the field based limitations only relate to the project or the resource, and not to the logged-in user.

> **Note:** Although the name of the tab is Project or Resource Limitation, this part of the data limitation is actually more general in that the field based limitation works on all of the types of events. Event is the term used to describe the individual lines in a project: the project, tasks, summaries, absences, and milestones. For example, a project, "ProjectX," has a single task named "TaskX." You then define a field based limitation that allows exactly those events through whose name starts with a "T." The result of this is that the event named "ProjectX" is not displayed, but the event named "TaskX" is displayed.

Create a Field Based Filter

Use these steps to define a field based filter.

To define a filter in these tabs:

1. Go to the Project Limitation or Resource Limitation tab.
2. Click **Field Based Limitation**.
3. In the dialog box that displays:
   a) Click **Add Expression**.
   b) Click on the first field to select a column.
   c) Click on the second field to choose a logical operation.
   d) Click on the third field to choose a value.
   e) Add more conditions, if needed, by clicking **Add Expression** again.
   f) (Optional) To define more complex conditions, click **Add Group**.
   g) (Optional)Repeat steps a-d for each condition under the group.
4. Click **OK**.

Field Based Criteria

The available logical operators depend on the data type of the column.

The columns in People Planner can be of the types described in the following table.

Type	Description
Date	A column that contains a date. Examples of this are the **Close Date**, **Start**, and **Finish** columns.

Type	Description
Numeric	A column that contains a number. Examples of this are the **Allocated**, **ERP Probability**, and **Sales Price** columns.
Flag	A column that contains a checkbox. Examples of this are the **Closed**, **Is Approved**, and **Unassigned** columns. **Note:** People Planner treats Flag columns as a special case of the Numeric data type, where 0 = is not selected, and 1 = is selected.
Lookup	A column that can only contain values that are defined in a list that is defined somewhere else-usually as one of the Dimensions. Examples of this are the **Company**, **Main Project**, and **Resource Category** columns.
Text	A column that contains text. Examples of this are the **Local Spec 1**, **Name**, and **Project Number** columns.

The logical operators that are available depend on the data type. For example, for text fields you can use the 'Starts with', 'End with,' and 'Contains' operators; whereas for number fields you have operators such as 'Is Less Than', 'Is Greater Than,' and 'Is Equal To.'

Note: You can configure a SQL Server to be either case-insensitive or case-sensitive--that is, where "a" is considered to be different from "A." The recommendation is to choose case-insensitive because the alternative will yield counterintuitive results like "A" < "Z" < "a" < z.

You can combine one or more conditions in a data limitation. You add each new condition by clicking the **Add Expression** button. You can also use groups when you need to define more complex conditions. Click the **Add Group** button to create a group.

You may often need to change the root operator-the operator at the top of the list of operators, which defaults to "And"-from "And" to, for example, "Or," or the data limitation will not let anything through. You can do this by clicking the root operator.

Click the **Field Based Limitations** button to open a wizard where you can create conditions for your data limitation

Option	Description
And	All conditions must be satisfied.
Or	At least one of the conditions must be satisfied.
Add Expression	Use this button to add an expression.

Option	Description
Add Group	Use this button to define more complex conditions that would normally require parentheses.
x	Click this to delete an expression.

Assignment Limitation Tab

Assignment limitations combine the filtering of the project limitation with the resource limitation and applies them to assignments.

Assignments can be seen in the People Planner application in various places. The Assignments Gantt (AG) Chart is the most obvious of these. The Project Gantt (PG) and the Resource Manager Gantt (RG) charts also show assignments. However, in those views this is not entirely obvious to users, because what they see is a list of resources and events, respectively.

It is important to realize that a data limitation with only an event part or only a resource part does not act directly on assignments.

For example: If you have defined a data limitation that filters on, say, events, and that data limitation lets only those events through where the name begins with an "A," this will not filter the assignment sub-grid in the RG. This will still display events such as "Taskd" or "OTaskXX2," even though the names of these do not begin with an "A." This is because the subgrid is showing assignments, not events.

An assignment has both an event and a resource part. Assignment data limitations are used to filter the assignments by applying either or both project data limitation and the resource data limitation on the assignments. You can set the assignment data limitations part of the data limitation to one of the following options:

- None
- Resource
- Event
- Resource or event
- Resource and event

For example: Assume that you have defined the following data limitation with both a Projects filter and a Resources filter. You can then select one of the five options of the Assignment Limitations; the effect is best illustrated using the AG chart.

The following table illustrates the effects of the options of the Assignment Limitations filters part of a data limitation.

Assignment Limitation	Description
None	The data limitation does not filter on assignments at all.
Resource	The data limitation displays only those assignments that fulfill the resource part.

Assignment Limitation	Description
Event	The data limitation displays only those assignments that fulfill the event part.
Resource or event	The data limitation displays only those assignments that fulfill either the resource or the event part (or both).
Resource and event	The data limitation shows only those assignments that fullfill both the resource and event parts.

Regulatory requirements for absence management demand that some types of absence may not be generally visible to just anybody-for example, illness. You can achieve this with the following data limitation:

Column	Logical Operator	Value
Absence Type	Is Null	
Absence Type	Is Not Equal To	Illness
Assignment Data Limitation: Event		

This data limitation does not have a resources filter component because you are only interested in filtering out absences or assignments on absences.

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

For example. without the data limitation, you can see the illness absence in the PG and the illness assignments in the subgrid in the RG. With the data limitation active, you do not see them in both the PG and RG.

Public Data Limitations

Use this window to create public data limitations.

A data limitation has three parts:

- Project Limitation tab
- Resource Limitation tab
- Assignment Limitation tab

A data limitation can consist of settings in one or more of the tabs.

When you create a data limitation, each tab provides specialized filters and generalized filters.

Deltek

Create a Public Data Limitation

Use these steps to create a public data limitation.

To create a public data limitation:

1. Go to the Public Data Limitations window.
2. Click **+Add**.
3. In the dialog box that displays:
    a) In the General tab, enter information in the fields as needed.
    b) In the Project Limitation tab, select the limitations you need.
    c) In the Resource Limitation tab, select the limitations you need.
    d) In the Assignment Limitation tab, select the limitations you need.
4. Click **Save**.

System Data Limitations

The People Planner administrator creates system data limitations and uses them to restrict the data that users are allowed to see.

To create a system data limitation:

1. Go to the System Data Limitations window.
2. Click **+Add**.
3. In the dialog box that displays:
    a) In the General tab, enter information in the fields as needed.
    b) In the Project Limitation tab, select the limitations you need.
    c) In the Resource Limitation tab, select the limitations you need.
    d) In the Assignment Limitation tab, select the limitations you need.
4. Click **Save**.

Combining Data Limitations

When a user has more than one function in the company, this is usually reflected by the user being assigned to multiple roles in People Planner.

Each role has its own set of privileges and its own set of associated data limitations. It is, therefore, relevant to discuss how data limitations are combined.

A public data limitation is essentially the same as a user data limitation, the only difference being that the administrator, not the user, creates it. A user can have a maximum of one user or public data limitation that is active at the same time. In contrast, you can have more than one system data limitation active through the roles that the user is assigned to.

This means that there are two possible types of basic combinations to consider:

- A system data limitation combined with another system data limitation
- A system data limitation combined with a user or public data limitation

Combined System Data Limitations

Rule 1: System Data Limitations are additive: If one of the system data limitations allows a user to see some specific data, that data should be visible, even if the other system data limitations do not allow that same user to see that data.

Were it not so, assigning more and more roles to a user would result in that user being able to do less and less work because less data would be visible with each new system data limitation (SysDL).

	SysDL1	SysDL2	SysDL1 + SysDL2
Allow a user to see a partial set of data	Yes	Yes	Yes
	Yes	No	Yes
	No	Yes	Yes

System Data Limitation Combined with a User or Public Data Limitation

Rule 2: System data limitations overrule user or public data limitations: A user or public data limitation may never give a user rights to see data that a system data limitation prevents that user from seeing.

Rule 3: Public or user limitations are subtractive: If a user data limitation dictates that a user does not want to see some specific set of data, that data should not be visible, even if the system data limitation (SysDL) otherwise allows that user to see the data.

	SysDL	UserDL	SysDL + UserDL
Allow a user to see a partial set of data	Yes	Yes	Yes
	Yes	No	No
	No	Yes	No
	No	No	No

Multiple System Data Limitations Combined with a User Data Limitation

The three rules are trivially expanded to cover cases where there are several system data limitations, and they are combined with a single public or user data limitation.

The following table shows the example of three system data limitations (SysDL) combined with a public or user data limitation (UserDL). **Bold** text indicates where the additive-rule of the system data limitations dictates that the specific data should be visible in the Ccombined data limitation. *Italic* text indicates where the subtractive rule of Public or User Data Limitation overrules this and dictates that the data should not be visible after all.

	SysDL1	SysDL2	SysDL3	UserDL1	Combined DL
Allow a user to see a	**Yes**	**Yes**	**Yes**	Yes	Yes
	Yes	Yes	Yes	*No*	No

	SysDL1	SysDL2	SysDL3	UserDL1	Combined DL
	Yes	**Yes**	No	Yes	Yes
	Yes	Yes	No	*No*	No
	Yes	No	**Yes**	Yes	Yes
	Yes	No	Yes	*No*	No
	Yes	No	No	Yes	Yes
	Yes	No	No	*No*	No
partial set of data	No	**Yes**	**Yes**	Yes	Yes
	No	Yes	Yes	*No*	No
	No	**Yes**	No	Yes	Yes
	No	Yes	No	*No*	No
	No	No	**Yes**	Yes	Yes
	No	No	Yes	*No*	No
	No	No	No	Yes	No
	No	No	No	*No*	No

Data Limitations and Performance

One of the uses for a data limitation is to improve People Planner's performance.

It turns out that the effectiveness of a data limitation is directly inversely proportional to how much data it lets through. The following graph is from a case study that was performed with a very large database.
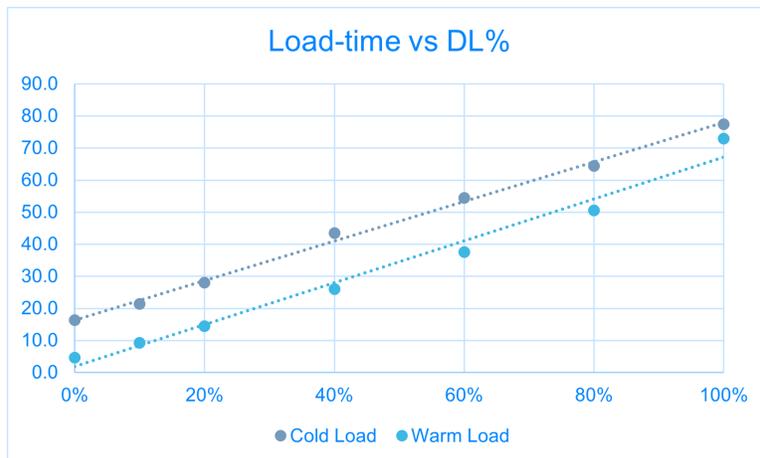
The scenario consisted of opening a perspective with a combined PG and RG and measuring how long this took. The numbers on the y-axis are the load times of the perspective in seconds.

These measurements were then repeated with different data limitations active. The numbers along the x-axis indicate how much data the active data limitation was letting through: 0% meaning that the data limitation was not letting any data through, and 100% meaning that the data limitation let all of the data through.

The two graphs clearly show that there was a linear relationship between how long it took to load the perspective and how much data the data limitation would let through. This relationship is indicated with the dotted trend lines.

The two graphs, Cold Load and Warm Load, refer to the cases where the People Planner application was just started or had been used for a while:

- **Cold Load**: People Planner has just been started. No data is cached yet, either in the memory or in the SQL Server.

- **Warm Load**: People Planner is now running, and the application has had time to cache the current working data in both the memory and in the SQL Server.

The graph for the Cold Load shows that the load time is not zero even if the data limitation hides all of the data. This is because there is always an overhead to starting up.

Given the linear nature of the graphs, this suggests a way to estimate how much data a data limitation must filter away to keep the load time below a specified threshold. You can simply measure how much time it takes to load the perspective with a data limitation that lets 0% through and with a data limitation that lets 100% through. Plot the two data points at 0% and 100% respectively, and draw a straight line between them. Use this line to estimate how much data the data limitation should hide for an acceptable load time.

Deltek

Users

This window displays a read-only list of all People Planner users. You can sort and filter users according to your needs.

Resources

This window displays a list of all resources in People Planner.

You can edit the names of resources, as well as configure each resource to be set as tentative on new assignments, if needed. You can also sort and filter resources in this window.

Languages

You can export all text into a JSON language file using the **Export…** button, translate using your favorite tool, then use the **Import…** button to import the translate text.

The text that is shown in the People Planner user interface (UI) is built using four types of dictionaries to satisfy different customers, language, and phrase requirements.

> **Note:** The phrase "translation" refers to substituting one text with another. This includes both substituting an English text with a local language text, but also substituting an English phrase/text with another English phrase/text.

By default, People Planner only contains the system (English) language. The system language contains only one pre-built global dictionary, whereas all user-defined languages contain all four dictionaries:
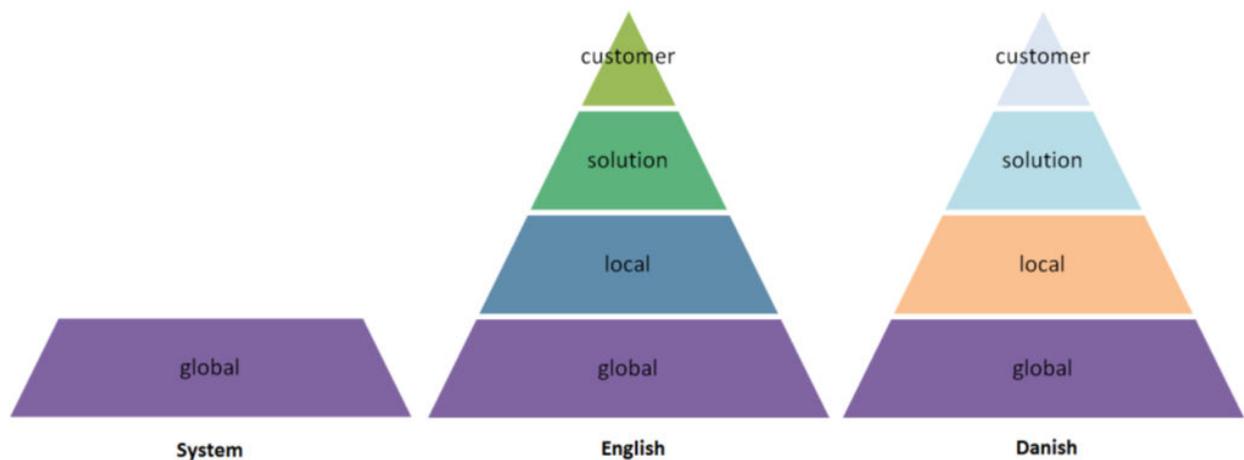
As indicated in the hierarchy shown in the preceding figure, texts are used in the following dictionary order: Custom, Solution, Local, and Global. For example, if a text exists in the customer dictionary, this takes priority over the other dictionaries, and so forth.

People Planner languages/texts are maintained in the Languages window of the Web Admin Tool.

Deltek

Tasks

The Tasks window consists of the following tabs: Task Specifications, Scheduled Task, and Custom Import Mappings.

Task Specifications Tab

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

You can create and manage the current task specifications in this tab.

Several buttons are available for managing and running tasks.

Button	Description
+New Task	Click this button to create a task specification.
Edit	Select one of the existing task specifications and click the **Edit** button to modify information.
Delete	Select one of the existing task specifications and click the **Delete** button to remove it. A confirmation message prompts you to accept or cancel the deletion. **Note:** You cannot delete a task specification if it is currently used in a scheduled task. If it has ever been used to import data, its log is also deleted.
⋯	Click to view a list of dates and times when the task was executed.

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

The Add Task Specification wizard displays specific tabs depending on the task type you select when you create a task specification.

Create a Task Specification

Use these steps to create a task specification.

To create a task specification:

1. Go to **Task Scheduling » Task Specifications**.

2. Click **New Task**.

3. Select one of the task types in the drop-down list.

    For more information about task types, see Task Types.

4. In the Add Task Specification wizard:

    a) In the General tab, enter a name and description for your task specification.

    b) Depending on the task type you selected, configure parameters as needed. For more information, see Task Type Parameters.

5. Click **Save**.

Task Types

This section provides details regarding the various task types available in People Planner.

Task Type	Description	For More Information
Batch Task Specification	Bundles together one or more Task Specifications and runs them in sequence, starting the next one when the previous one has finished.	Batch Task Definitions
Delete old log entries	Cleans up the log table by deleting very old log entries.	Delete Old Log Entries
Exchange Synchronization	Synchronizes bookings and to do's with Exchange and Outlook.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Export Favorites to Maconomy	Tells Maconomy to create favorites for those resources that have bookings in People Planner.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Import Absences from Maconomy	Imports absences from Maconomy.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Import Actuals from Maconomy	Imports actuals from Maconomy, such as time registrations.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Import External Data (Excel/CSV/SQL Server/ Oracle)	Imports data from an external source such as an Excel or CSV file.	For more information about configuring this

Deltek

Task Type	Description	For More Information
	Note: In People Planner 4.7, the Web Admin Tool supports imports through Excel and CSV only.	functionality, refer to Custom Import Mappings.
Import Increment Actuals from Maconomy	Imports only actual registrations that were changed or added since the last incremental import. **Note:** This option is only available when the **Use REST for ActualsUse REST for Actuals** setting is enabled.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Import Master Data from Maconomy	Imports master data from Maconomy.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Import Projects from Maconomy **Note:** Maconomy uses the term "job," rather than project.	Imports and updates projects from Maconomy.	For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*
Update Reporting Tables		For more information about configuring this functionality, refer to the *Deltek People Planner Integrations Guide.*

Task Type Parameters

Each task type has a number of associated parameters that can be divided into three groups

Parameter	Description
Global Parameters	These settings include items such as the Maconomy URL and Maconomy credentials, and are shared among all of the types of task specifications. Global parameters are set in the Settings window of the Web Admin Tool.
(Task) Type Parameters	These settings apply to a task type and are used for all tasks of the specified type. Task type parameters are set in the Settings window of the Web Admin Tool.

Deltek

Parameter	Description
Local Parameters	These settings apply to a specific task specification and can be set in the Task Specifications tab. The number and type of task parameters depend on the task type. For some task types (such as the task types of the Maconomy Imports), default values can be set for local parameters, yet still be changed from within this tab. For the other task types, there are no default values, and the values must be set when defining the task specification in this tab.

> **Note:** Only the task type and the local parameters can be edited from the task specification. The type parameters and the global parameters must be edited in the Settings window of the Web Admin Tool. When the tabs are included in the Add Task wizard, it is only for information.

For more information about the options in the Local Parameters tab for each type of import, refer to the *Deltek People Planner Integrations Guide*.

Batch Task Definitions

The Batch task type is different from all the other task types in that it is used to run other tasks in sequence, such as when you may need to regularly run several tasks, one after the other and in a specific order.

An example could be to run a nightly set of tasks:

- Update Master Data from Maconomy
- Import and update Projects
- Import Absences
- Import Actuals

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

The use of batch task specifications enables you to group task specifications and run them in order. If any one of the component task specifications in a batch task specification fails, the execution of the batch task specification stops.

You create a batch task in the same way as other task specifications and by setting the task type to **Batch Task Definition**.

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

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

Button	Description
Add Task	Click this button to add a new task to the end of the list of tasks currently in the batch.
Remove Task	Select the item that you want to remove and click this button to remove it from the list. The original Task Specification is not deleted; you can add it again if you wish.
Move Up Move Down	The tasks on the list are run from the top to the bottom. To reorder the list, select the item that you want to move up or down, and then click these buttons.

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

> **Note:** You cannot nest a batch task specification within another batch task specification. The same task specification can only appear once in a particular batch task specification.

Continue this way until you have added all required task specifications. You can use the **Move Up** and **Move Down** buttons to adjust the order in which the tasks are executed.

Scheduled Task Tab

A scheduled task adds a scheduling part to a task specification.

You cannot run task specifications manually, but you can schedule it to "Never Run" and use the play button described below to run it immediately.

However, if you want to automate a task so that it runs at a set time, such as during the night when the system is otherwise idle, you can create a scheduled task.

> **Note:** To run scheduled tasks, the People Planner Windows Service should also be installed and running.

You can view and manage the current scheduled tasks in this tab.

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

Button	Description
+Add	Click to schedule a task defined by its task specification.
Edit	Click to edit an existing schedule.
Delete	Click to delete the selected task schedule. A confirmation message allows you to accept or cancel the deletion. > **Note:** A scheduled task cannot be deleted if it has ever been used to import data.

Deltek

Button	Description
▶	Click to schedule the task to be run by the People Planner Service.
⋯	Click to view all executions of the selected task schedule.

Create a Scheduled Task

Use these steps to create a scheduled task.

To create a scheduled task:

1. Go to **Task Scheduling** » **Scheduled Task**.
2. Click **+Add**.
3. In the wizard that displays:
   a) In the **Task** field, select the task specification you want to schedule.
   b) In the **Name** field, enter a name for the scheduled task.
   c) In the **Description** field, enter a description for what the task does.
   d) In the **Schedule Type** field, select an option to determine when the scheduled task runs.
      See the Schedule Types section for detailed information.
   e) In the **Email Results** field, select an option to determine whether you should receive email notifications on the task.
   f) Click **Save**.

Schedule Types

This section provides details regarding the time and date for running a scheduled task.

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

Deltek

Schedule Type	Description
Weekly	Run the scheduled task on preset days during the week.
	When you select this value, the **Schedule** field displays the days of the week, where you can select one or more days.
	This schedule type is useful for tasks that should be run during the weekend, for example. You must also specify the time of day for the schedule.
Monthly	Run the scheduled task on preset dates during the month.
	When you select this value, the **Schedule** field displays a calendar where you can select specific dates. Hold the CTRL or SHIFT key to select multiple dates.
	The **Include Last Day of Month** checkbox is a special value that varies with the length of the month. If you select this checkbox, you do not need to cautiously set the date to "28" if you want the job to run toward the end of every month. You must also specify the time of day for the schedule.
Interval	You can use this schedule type to run a scheduled task frequently to ensure that data in People Planner and Maconomy is in sync.
	When you select this value, you can set a time range for running the task using the **Schedule** and **Time Range** fields.
	For example, you can schedule a task that runs every 10 minutes during working hours (plus a small margin). By not running this scheduled task outside working hours, this time can instead be used for other maintenance purposes, such as performing backups.
	Note: Running tasks frequently during working hours may have an impact on the general performance of the system.

You can also configure when to receive an email whenever a scheduled task has run.

Email Notification when a Scheduled Task Fails

You can configure People Planner to send an email when a scheduled task fails.

To perform the setup to send an email when a scheduled task fails:

1. Go to **Settings** » **System Settings** » **Notification** » **Notification Settings**.
2. Enter information in the fields.
   For more information about each field, see System Setup » Notification.
3. Click **Save**.
4. Restart the People Planner service to force it to read the changed settings.

This provides People Planner with the settings for sending emails. You must also configure each scheduled task. You do this by selecting an option for the **Email Results** field as shown in the following table.

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

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

If you choose to receive an email every time the scheduled task runs, the email provides a summary of the run, and the relevant part of the log is attached.

Execution Logs

Whenever a task specification or scheduled task is executed, the result is logged in the execution logs.

You can view the execution logs of any task specification or scheduled task by clicking the **Execution Log** button. This displays a list of executed tasks on the screen. Select a task, then select the **Execution Log** button again to view its log entries.

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

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

Delete Old Log Entries

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

To clean up log entries and reduce the number of unnecessary files on your database server, you can create a task specification to delete old log entries. This is based on the same task specification functionality that is used for importing tasks and is set up in the same way.

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

1. Go to **Settings** » **System Settings** » **System**.

2. Set the value of the **Keep log entries from the last months** setting to the appropriate number. This is the number of months back for which you want to retain log entries.

3. Click **Save**.

Custom Import Mappings

Use this tab to import data from an external source.

The supported sources are:

- An Excel file, which can contain one or more worksheets.

- A CSV file.

This task type can be used as a supplement to the existing Maconomy integration, or it can be used to build an integration to a third-party system, such as a SAP system.

> **Note:** You can only use this to import data into People Planner. If you need to export data from People Planner to a third-party system, you should use the **External Views** instead.

When setting up such a task, you start by defining a custom import mapping. The purpose of a custom import mapping is to act as a translator between the data formats of the external source and those of the internal People Planner tables.

When you have defined the custom import mapping, you can use it to define the task specification, and you can add a scheduled task on top of that to provide automated execution:

A Word of Caution

Custom import mappings import external data almost directly into the tables in the People Planner database. In certain cases, a custom import mapping may partially bypass the normal business logic built into the People Planner application. This can result in the creation of data structures that would not normally be possible-or at least are highly unusual-and in a way that results in People Planner not performing very well.

As with any powerful tool, the custom import mapping requires expert knowledge of how to use it properly, or it can result in unforeseen issues. In the case of custom import mappings, some extra knowledge about the business logic of People Planner is certainly required.

To put it in another way: Just because your custom import mapping seems to be working, this is not a guarantee that it works well.

Create a Custom Import Mapping

Use these steps to create a custom import mapping.

To create a custom import mapping:

1. Go to **Tasks** » **Custom Import Mappings**.
2. Click **Add**.
3. In the **Name** field, enter a name for your custom import mapping.
4. In the **Import Type** field, select an import type from the drop-down list.
5. In the **Server file path** field, enter the folder path of the file on the serve to use when running the custom import mapping.
6. Click **Next**.
   From this point on, the steps depend on which kind of import type you want.

Available Import Types

This section describes the available import types.

The available import types are described in the following table.

Import Type	Description
Excel	The import data is stored as an Excel file and on one or more worksheets. Both the old .xls and the newer .xlsx formats are supported.
CSV file	The import data is stored in a comma-separated file.

Import Excel and CSV Files

When the import is from Excel files or CSV files, you can choose between either importing a specific file or importing all matching files in a specific folder.

To create a custom import-mapping, People Planner must have an initial file to learn the expected format from.

To select a file to import:

1. In the **Local sample file path** field, click **Select File**. Alternatively, you can drag and drop your file into this field.
2. Select the file that you want to import.

You can now create the custom import mapping as described in Import from an Excel File and Import from a CSV File.

If this is all you do, when the import runs, it looks for a file by the exact name and path and import the data from that. To import new data, you overwrite the existing file with a file with the new data and run the import again.

For this to work, it is important that the new file always have exactly the same name and location.

However, if your file has a name that changes, for example, because the filename includes a timestamp that indicates when it was created, you can instead choose to keep the directory-name constant and then import all the files from the folder.

To indicate that you want to import all files from a specific folder:

1. Select the **Import Multiple Files** checkbox.

> **Note:** This is only supported for single mapping.

2. In the **File search pattern** field, enter a file mask for the files you want to import.

The format of all the imported files must be the same as the file that is used to define the import-mapping. You can have files for different import-mappings in the same folder, but then you must distinguish between them in the**File search pattern** field.

For example, if you are defining an import mapping to import resources, you can specify that you are only interested in the files where the name is prefixed with "Employee":

If the folder contains more than one file that fulfils your file search pattern, they are imported in the order of the oldest file first.

> **Note:** When you define the task specification on top of the custom import mapping, you can specify that files to be imported shall be moved out of the folder and into a different folder. This way you are sure that the import will not import the file more than once. See Tasks.

Once you have finished adding all files for import, you can click the **Validate Import** button to check whether all prerequisites have been met to allow the import mapping to run correctly. Validation includes the following:

- The file exists on the server.
- The user has the correct permissions to run a custom import mapping.
- The service is running.

Import from an Excel File

The steps in this section are based on an example where you are creating a Custom Import Mapping that imports employees.

The data is stored in a file called Employees.xlsx. After the import, it is visible in the Resources view as Kind = Individual. The example file contains three columns, one line with headers, and ten additional lines with the data, as shown in the following figure.
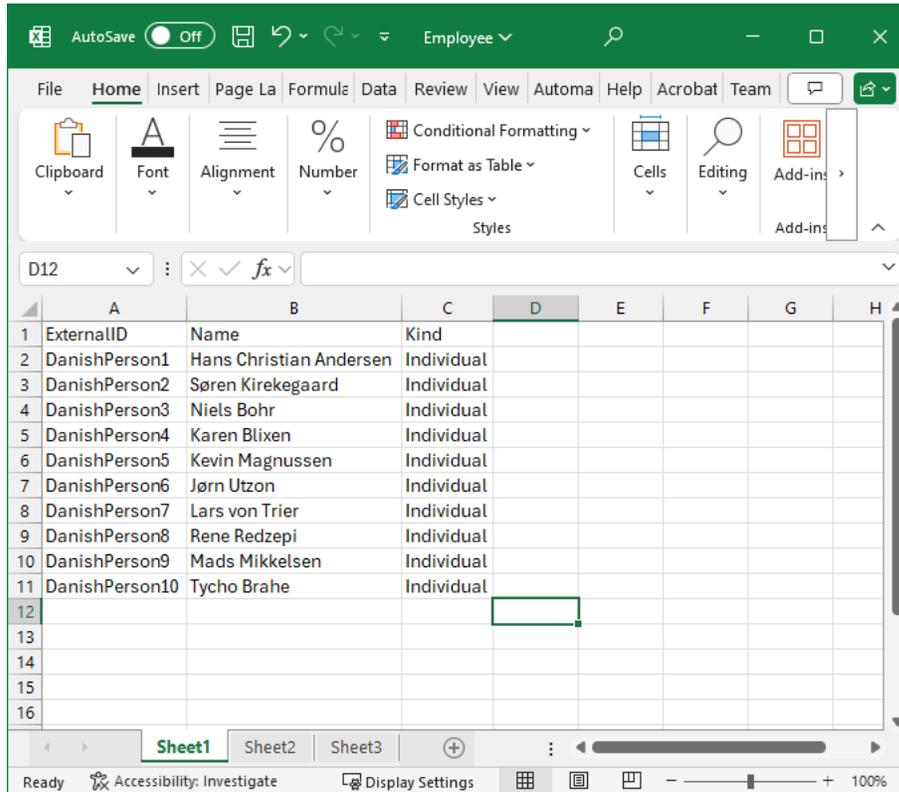
In the Custom Import Mappings tab, you continue by doing the following:

1. In the **Import Type** field, select **Excel** from the drop-down list.

2. In the **Local sample file path** field, click the **Select File** button to browse for the **Employees.xlsx** file in the file system and select it.

   > **Note:** You cannot continue to step 3 until you have selected an Excel file. In the example, you already have a file, and it is therefore not a problem. However, if you are defining a new Custom Import Mapping, you might not have an Excel file yet. This presents you with a bit of a hen-and-eggs problem where you do not necessarily know the format of the Excel file before you have the mapping, but you cannot create a mapping before you have the format of the Excel file. The solution is to create an empty Excel file and use that file to get you started. It then becomes an iterative process to define the structure of the Excel file and the mapping. For more information, see Determine the Format of the External Data.

3. Click the **Add** button to open the Create Entity Mapping dialog.

4. In the **Source Tab Name - Excel** field, select the sheets in the Excel file from which you want to import data from the drop-down list.

5. In the **Destination Entity Name** field, select the People Planner table into which you want to import the external data from the drop-down list.

   In this example, this is: **Resources » Resource**

6. Click **Save** when you are done defining the mapping

    When you have chosen a sheet to get the data from and a table to import the data into, People Planner attempts to map the External Fields to the Internal Fields.

    The list of fields can be very long because the number of available Internal Fields is long. You can use the Show only fields with mapping checkbox to toggle between showing all the possible fields and showing only the fields that have already been mapped. This is useful when you want to confirm that you have mapped the fields that you need to map.

    > **Note:** People Planner attempts to map the fields based on their names. Sometimes this mapping fails, for example, because the names are not identical or because you have not included a column that is mandatory for the mapping. In this case, you must select the checkbox again if you want to see the fields that are missing from the mapping.

    In the example, you have the three columns: **ExternalID**, **Name**, and **Kind**, and People Planner is able to map the fields correctly.

In this example, the imported data is displayed in the Resources view. In addition to the default columns, the **Origin** and **External ID** columns have also been added. The Origin shows that the resources were imported by the Import Mapping with the name EmployeeImport1. The External ID column contains the values from the ExternalID column in the original Excel spreadsheet.

In this example, the imported data is displayed in the Resources view. In addition to the default columns, the Origin and External ID columns have also been added. The Origin shows that the resources were imported by the Import Mapping with the name EmployeeImport1. The External ID column contains the values from the ExternalID column in the original Excel spreadsheet.

Import from a CSV File

Defining a custom import mapping to get the data from a CSV file is similar to the process for defining a custom import mapping to get the data from an Excel file.

(Optional) Enter the prerequisites here. This should be relatively brief. If you need to write extensive prereq info, create a reference topic for it and combine the topics using a small ditamap. Be sure to keep the first sentence in the <p> element.

. When you have created a custom import mapping, you continue by performing the following:

1. In the **Import Type** field, select **Comma Separated Values** from the drop-down list.

2. In the **Local sample path** field, enter the file or folder path on the server to use when running the import mapping.

    > **Note:** You cannot continue unless you choose a CSV file. If you do not yet have one, you can use an empty file.

3. Click the **Add** button to open the Create Entity Mapping dialog.

4. In the **Data file encoding** field, enter a value.

    Because a CSV file is simply a raw text file, you also need to choose the correct value for the **Data file encoding** field. If you do not know what the correct value is, you can use the preview function:

5. Click **Add** to add a mapping.

6. In the **Source Table Name – CommaSeperatedValues** field, select the CSV files you want to import the data from.

7. In the **Destination Entity Name** field, select the People Planner table into which you want to import the external data from the drop-down list. In this example, this is **Resources** » **Resource** .

8. Ensure that you have at the least the columns shown in the following figure in the CSV file. The order of the columns is not important, but the names of the columns must appear as the first row. After the first row, you can have some examples of import data.
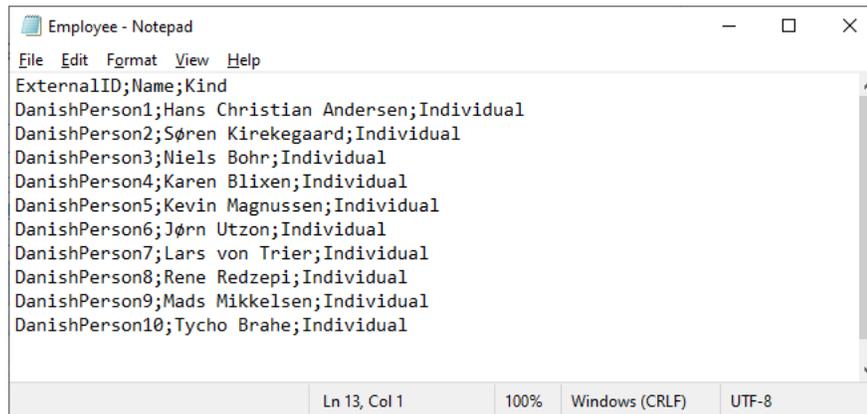
9. When you have mapped the mandatory fields, you can deselect the checkbox and map other fields that you want.

10. Click **Save** when you are done defining the mapping.
CSV is an abbreviation for "comma-separated file." However, in the preceding example, the data is separated by semicolons (;) instead of commas. You can determine which list separator you should use by configuring this in your Windows settings.

Add Multiple Mappings

You can add more than one mapping in a Custom Import Mapping. An instance where you can use this is if the Excel file has multiple tabs, and you want to import data from each of them

You add each mapping by clicking the **Add** button in the Entity Mapping window.

Example

The Data.xlsx file has two tabs with data, Employee and Popup1.
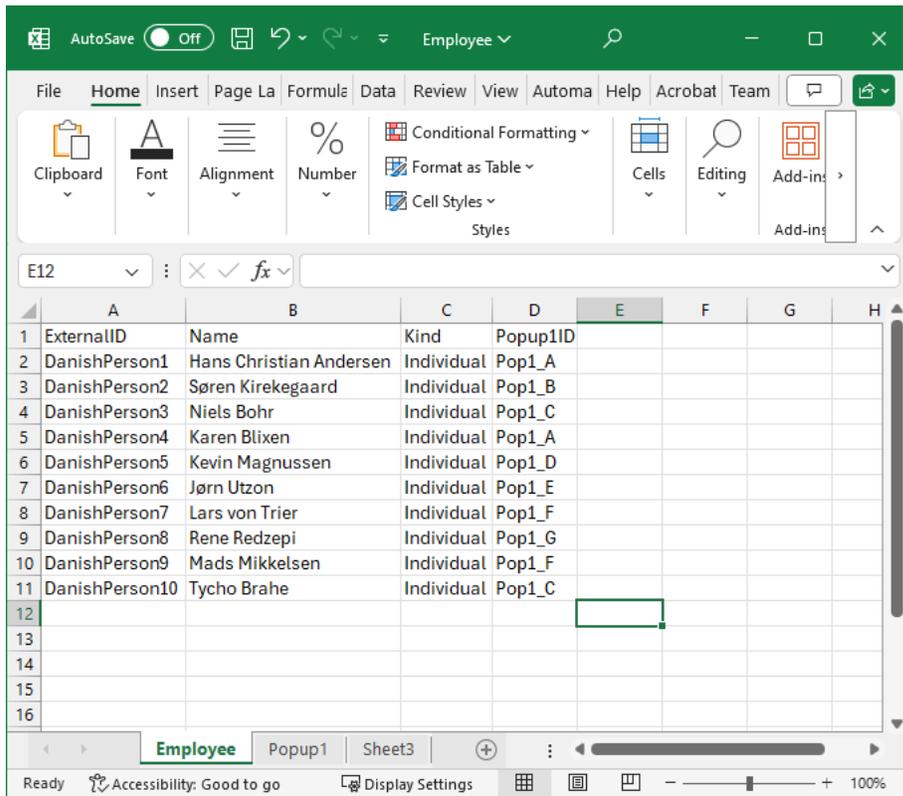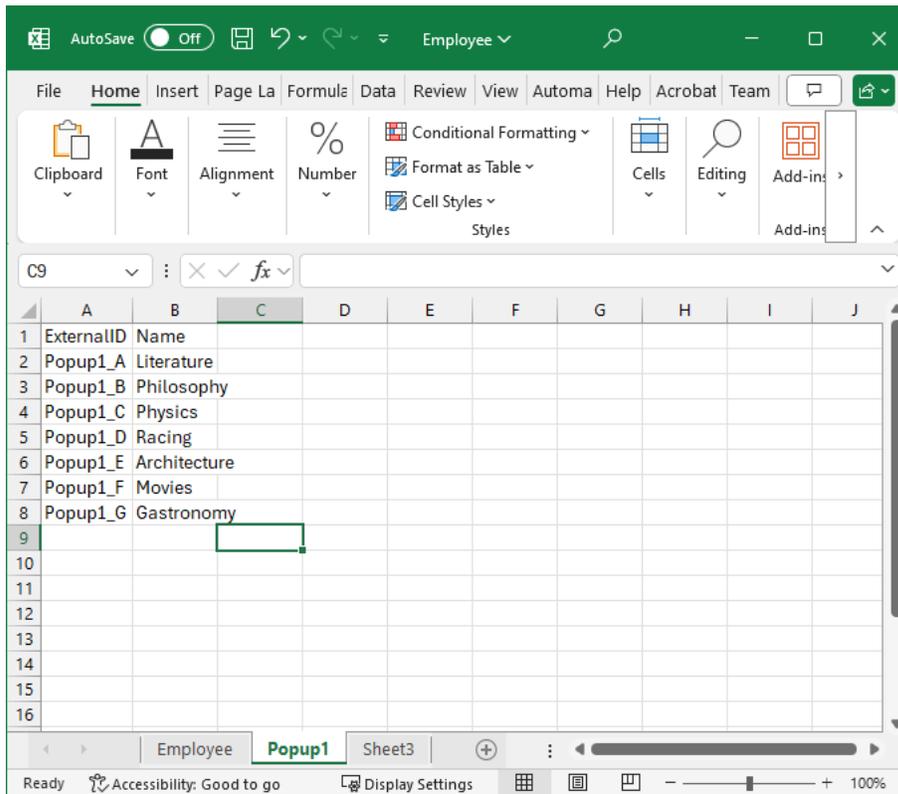
When you import this file, you must import the Popup1 entries before the Employee entries.

To do this, complete the following steps:

1. Create a Custom Import Mapping.

2. Click the **Add** button to add a mapping.

3. In the **Source Tab Name - Excel** field, select the **Popup1** tab.

   The resulting mapping should show the ExternalID and the Name columns being mapped.

4. In the **Destination Entity Name** field, select **Resources** » **Parameters** » **Resource Popups** » **ResourcePopup1** from the drop-down list.

5. Click **Save**.

   You have now created the first mapping. To add a second mapping, you must continue with the following steps.

6. Click the **Add** button again.

7. In the **Destination Entity Name** field, select **Resources** » **Resource**.

8. In the **Source Tab Name - Excel** field, select the **Employee** tab.

9. Click **Save**.

You have now created a second mapping.

The order of the mappings is important. When you run the Custom Import Mapping, the individual mappings are run in the order in which they appear.

The result of this custom import mapping is that you have imported rows into the Popup1:
Views » **Resources** » **Parameters** » **Resource Popup** » **Popup 1**.

Similarly, rows have been added in the **Views** » **Resources** » **Resources** view, and if you add the Popup 1 column, the popups are seen as well.

> **Note:** If you define multiple mappings, you cannot use the **Import multiple files** option.

The preceding example is with an Excel file, but the multiple mappings can be used for the other types of import as well; for example, you can select multiple CSV files in the CSV Files(s) field and then create a mapping for each of them.

Changes in the External Data

The external data may change between imports.

This can happen in three ways:

- **Data was added**: A row that was not in the file at the previous import has been added; for example, a new employee has joined the company.

- **Data was deleted**: A row that was in the file at the previous import has been removed; for example, an employee has left the company.

- **Data was updated**: A row that was in the file at the previous import is still there, but has been changed in some way since the previous import; for example, an employee has changed their name.

Data was Added

In this case, People Planner simply adds the new data the next time that you run the import.

This is the default behavior, but you can change it by selecting the **Only update existing objects (import fails if objects don't exist in People Planner)** checkbox. You select/deselect this checkbox as part of defining the custom import mapping.

If this checkbox is selected, and you run the import after new external data has been added, People Planner reports this as an error.

Data was Deleted

By default, existing data is not deleted as part of an import mapping. Any data that has been imported into People Planner once remains, even if it is not in the external source anymore.

You can change this behavior by selecting the **Delete previously imported objects in PeoplePlanner that no longer exist in external data** checkbox. You select/deselect this checkbox as part of defining the Import Mapping.

> **Note:** Only data that was previously imported though the Import Mapping is deleted. People Planner does not delete data with a different Origin.

Data was Updated

People Planner identifies the external data from the External ID. As long as the External ID does not change, the rest of the data is allowed to change. When you run the import the next time, People Planner updates the data from the previous import.

Determine the Format of the External Data

If you want to create a custom import mapping, you must start with a source with external data, such as an Excel file. If you do not have this, you cannot create the mapping.

You must define which columns the Excel file should contain. It is also a good idea to have actual data in the file.

However, this poses practical problems when:

- You do not yet know which fields you must import.
- The export functionality that creates the file does not yet exist.

People Planner allows you to use an empty Excel file. Using an empty file, you can proceed to the point where you can identify the fields to add.
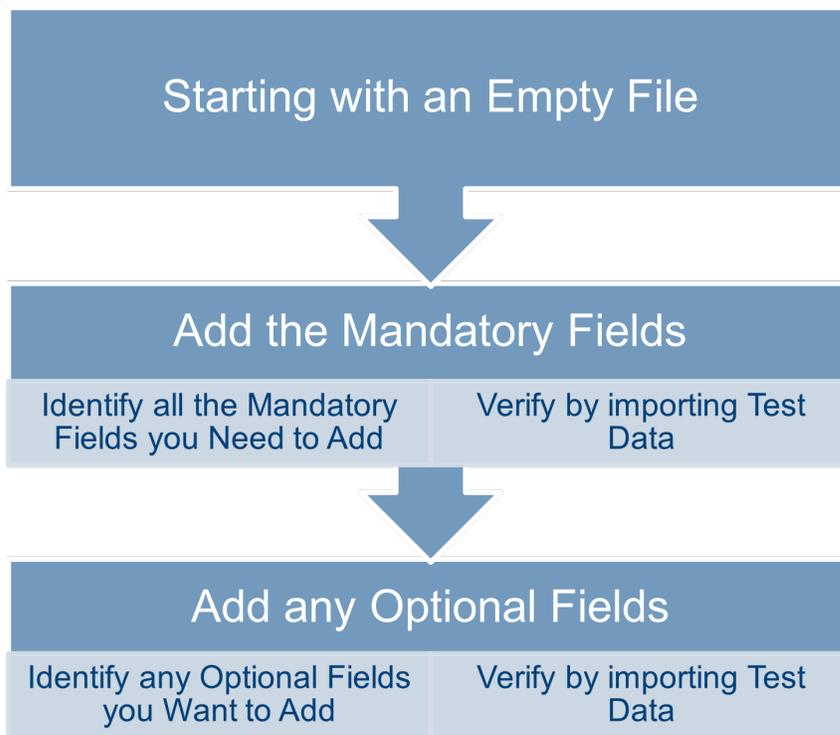
Adding New Fields

When you are in the process of defining a Custom Import Mapping, and you specify a file with external data, People Planner loads the file. People Planner does this to be able to map the fields and to show the preview data from the file.

If you decide that you need to add a new column to the file, there is no easy way to force People Planner to reread the file. Instead, you must save the incomplete Custom Import Mapping and close the editing dialog. You can then open the CustomImport Mapping again by editing it. This forces People Planner to read the file again, and it then discovers the new columns and test data.

Identifying the Mandatory Fields

Mandatory fields are recognizable by the icon. However, a few of the mandatory fields lack this icon, and the only way to identify them is to try out the import; any mandatory field that is missing results in an error message.

Verifying Using Test Data

You should always verify that the Custom Import Mapping works as intended by importing some data. If you do not already have real data available, you can try to create some test data and use that.

Using test data can also be a useful tool if you are not sure about the format:

- **Numbers**: Should you use decimal points or commas?

- **Dates**: Should you use the "mm/dd-yyyy" or the "dd/mm-yyyy" format?

Data Types

Data in People Planner can be of different types, and the source with the external data must consider this.

This is the start of your concept.

This is especially the case when the external data is stored as a CSV file. The content of a CSV file is pure text, and the Import Mapping must know how to translate the text into the relevant data type.

Example

If the target data type is a date, and the text is "02-09-2016," the import must know if this was stored in "dd-mm-yyyy" or "mm-dd-yyyy" format.

The data types are:

- Text

- Numbers

- Checkboxes/flags

- Dates

- LookUps

Text

Many fields in People Planner are of the text type. Some examples are the name of a resource or a project. You can normally import text fields directly without any issues.

An exception to this is if the external file is a CSV file. In a CSV file the individual columns are divided by a dedicated delimiter character such as a semicolon (;) or a comma (,). If the delimiter

happens to be included in the text field, the usual solution is to place the text inside quotation marks, as the following example shows.
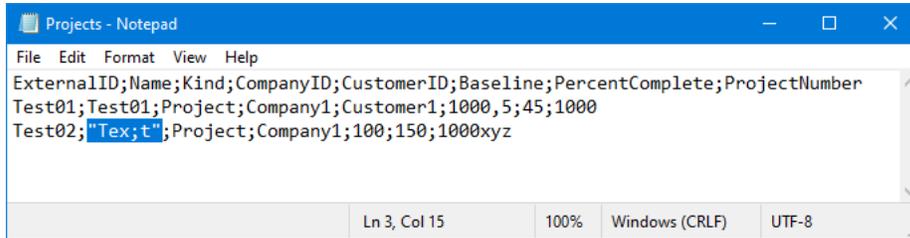
Some fields may appear to be a number, but are actually a text field. An example of this is the Project Number. People Planner does not care if the data has been stored as text or number format-for example in Excel-and imports the field just fine.

If the external source is a CSV file, encoding can be an issue. See Import from a CSV File for more details.

Number

Number fields in People Planner can be of two types: Integer fields and Decimal Number fields.

> **Note:** There is no easy way to verify whether a **Number** field is of the type Integer or Decimal Number. A tip is to change the People Planner setting for how many decimals to show, and set it to **1**.
>
> A **Decimal Number** field can then show numbers like 45.5, whereas an Integer field cannot show any decimals.

In the following example, the Baseline field is a Decimal Number field, while the PercentComplete field is an Integer field (and the ProjectNumber field is a text field).
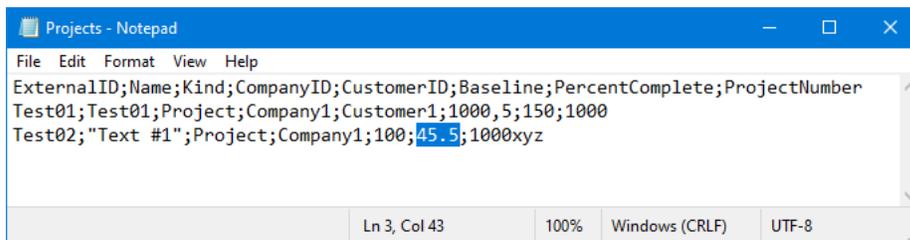
Being an Integer field the value "45.5" is invalid for the PercentComplete field. Depending on whether the source was an Excel file or a CSV file, two different things would happen:

- **Excel**: The import rounds the number off to the nearest integer. In this case, the value "46" is imported.

- **CSV**: The import fails with an error message that the input is not in a correct format.The import fails with an error message that the input is not in a correct format.

If the external file is a CSV file, you must be careful with the thousands-separator and whether you are using a decimal point or comma. In some countries, you format numbers using a comma as the thousands-separator and a period as the decimal-separator, while in other countries it is the opposite:

- The Nordic countries: 10.000,50
- US: 10,000.50

You can configure which separators you should use in your Windows settings. You should generally avoid the thousands-separator altogether and only have to worry about using the correct decimal symbol.

> **Note:** If the external data comes from an Excel file, this problem does not exist.

Checkbox or Flag

Some of the columns in People Planner are checkbox columns, sometimes also called flags.

If the source is a CSV file, you use the value "True" to select the checkbox and "False" to deselect it.

When the source is an Excel file, you can still use "TRUE" and "FALSE" for this. However, you can also use the fact that a checkbox is just a special case of an Integer field where 0 means False and any value different from 0 means True.

Date

If you import from a CSV file, and it contains dates, you must consider how the dates are written:

- Nordic countries - 02-09-2024
- US - 09-02-2024

If you have the format wrong, and you attempt to import some data, one of two things can happen:

- In the best case, you get an error message.
- In the worst case, the dates are imported into People Planner, but they are wrong; for example, the day and month parts are switched around.

You can configure which date format you should use in your Windows settings.

> **Note:** When you test the import mapping with test data, you should be sure to include a date like December 31, which is invalid in one of the formats.

LookUp

These columns point at data that has been imported into a different table in the People Planner database.

If you import a row of data where one of the fields refers to some other piece of data that you also import, you must ensure that that data has already been imported into the other table before you refer it to its ExternalID from a different Import mapping.

Destination Entity Name Field

You use the **Destination Entity Name** field to determine into which People Planner table you want to import the external data.

Before you start importing data into the People Planner tables, you should understand the following.

When you import via Custom Import Mappings, you have almost free rein in terms of how you choose to import the external data into the People Planner database. However, as with any powerful and flexible tool, this requires that you know what you are doing.

Although you cannot directly violate the People Planner business logic, you can easily fill its tables with data in a manner for which they are not intended, and which would not occur in connection with a manual operation of People Planner via its GUI. The result could be a People Planner database that differs differ significantly from how it would appear if you entered the same data manually.

Great efforts are put into optimizing the performance of the People Planner software. However, this work has been focused on how customers normally use the system; for example, certain database tables tend to contain a lot of data-and the functionality has been optimized for this-while other tables tend to be quite small-and have so far not required a lot of attention. If you do the import incorrectly, you may therefore end up with a setup that does not perform as well as a more appropriate import would do.

The problem is made worse by the fact that Custom Import Mappings can be used effectively to import large amounts of data -so big that they could never possibly occur in a manual operation.

Although there are differences, the structure of the **Destination Entity Name** field mimics the structure of the View menu. This makes it easy to determine which tables go together with which views.

The following table describes the most important imports.

Import	Destination Entity
Projects and tasks	Projects » Project Task Milestone
Budgets	Projects » Project Task Milestone
Customers	Dimensions » Customer
Resources	Resources » Resource
Users	Security » User
Assignments	Assignments are automatically created when you book a resource on a task.
Bookings/Allocations	Entries » Man hour entry
Absences	Entries » Man hour entry
Time Registrations	Entries » Time registration entry

Run a Custom Import Mapping

To run a Custom Import Mapping, you must first create a task specification.

Once this is done, you should create a scheduled task, then click on the **Execute** button to run the task specification.

Create Task Specification for Custom Import Mapping

To automate the import, you must start by creating a task specification. You can then later add a scheduled task on top of this.

To use a Task Specification to automate the import:

1. Go to **Tasks** » **Task Specifications**.

2. Click **New Task**.

3. Select **Import External Data (Excel/CSV/SQL Server/Oracle)** from the drop-down list for the task type.

4. In the Add Task Specification wizard:

   a) In the General tab, enter a name and description for your task specification.

   b) In the Local Parameters tab, select your custom import from the drop-down list in the **Import mapping** field.

5. Click **Save**.
   Another of the local parameters, **Move imported data files to subfolder**, controls what should happen to the file with the external data after the import. When this checkbox is selected, People Planner creates a subdirectory and moves the file to that subdirectory as a backup.

Create a Scheduled Task for Custom Import Mapping

You add a scheduled task for your custom import mapping on top of the task specification in the usual manner.

To create a scheduled task for the custom import mapping:

1. Click **+Add**.

2. In the wizard that opens, select the task specification.

3. Give the scheduled task a name.

4. Define a schedule.

5. Click **Save**.
   You can run the scheduled task by selecting it in the list, then clicking the **Execute** button.

Practical Examples

This section provides examples of practical usage of custom import mapping. These are intentionally simple examples.

Import of Skills and Skill Assignments

In this example, you import skills from an Excel file into People Planner, including assigning the skills to existing resources.

Assuming that the skills are stored in an external system-for example, an HR-system-and that you can export them from there to an Excel file, this is the simplest format that you can use.

First, create an Excel file and name it **Skills.xlsx** or something similar.

Add the first sheet and name it **Skill Level Lists**, with the format shown in the following figure.
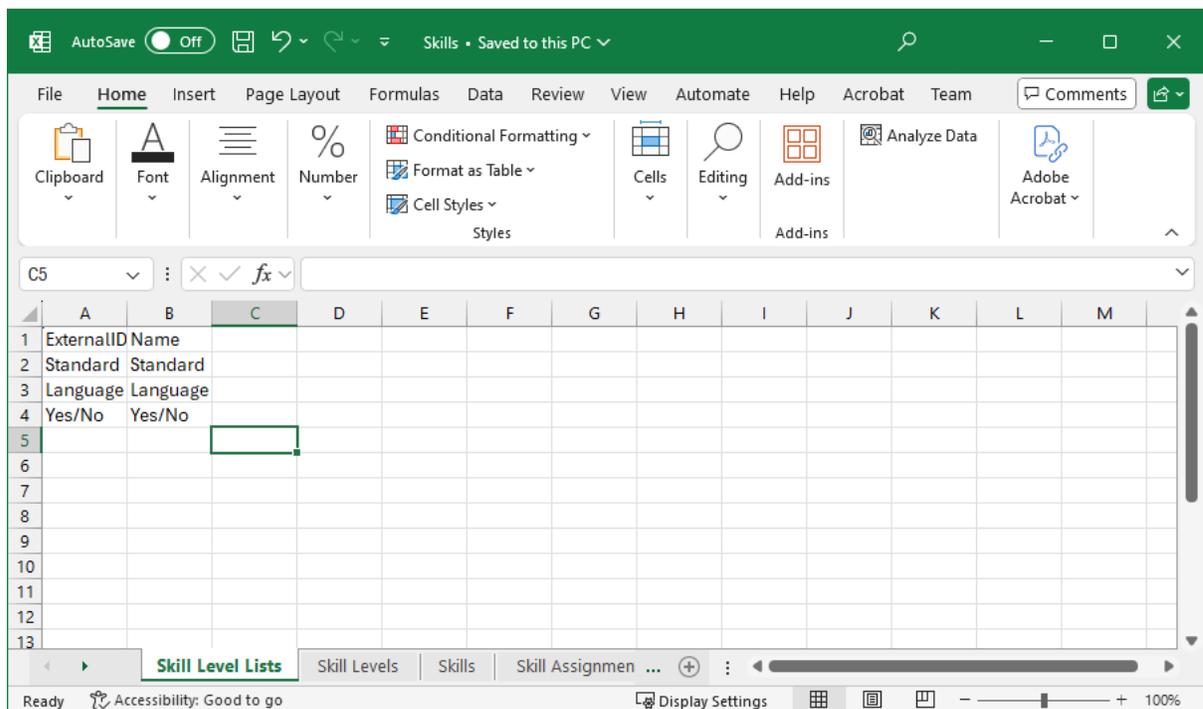
Add a second sheet and name it **Skill Levels**, with the following format.

The example-data shows that the Skill Level List with the name **Language** has four levels: Novice (L5), Some (L6), Experienced (L7), and Fluent (L8).

Deltek
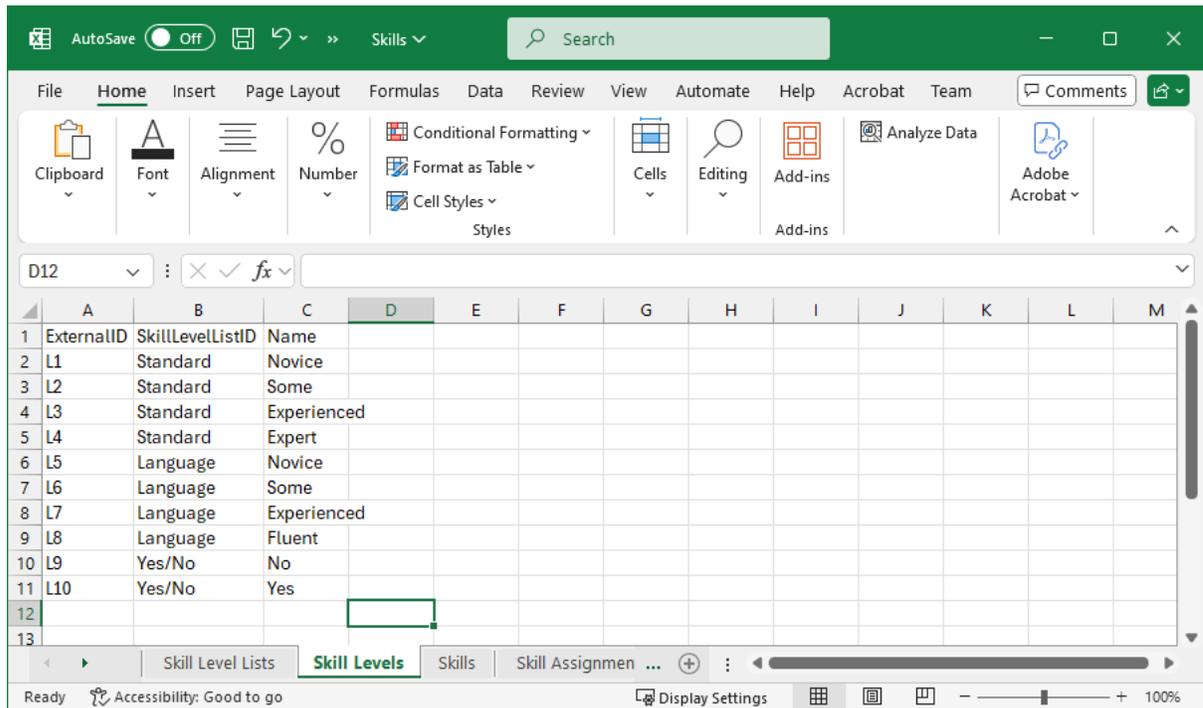
Add a third sheet and name it **Skills**, with the following format.

The example-data shows that the three different skills-Consulting, Project Management, and Presentation Technique-share the same Skill Level List named Standard, with the following levels: Novice, Some, Experienced, and Expert.
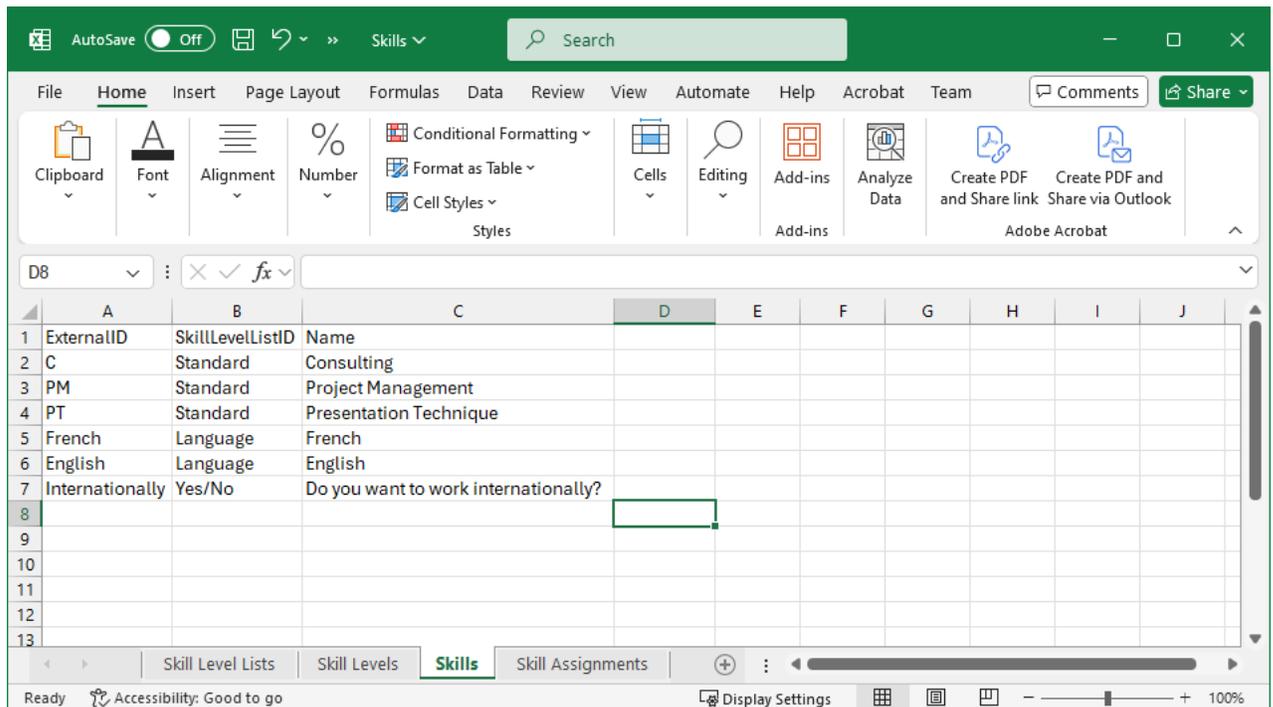
Add a fourth sheet and name it **Skills Assignments**, with the following format.

The example data shows that the Resource with the External ID DanishPerson12 has two skills, Project Management and French, at the levels Experienced and Novice, respectively.
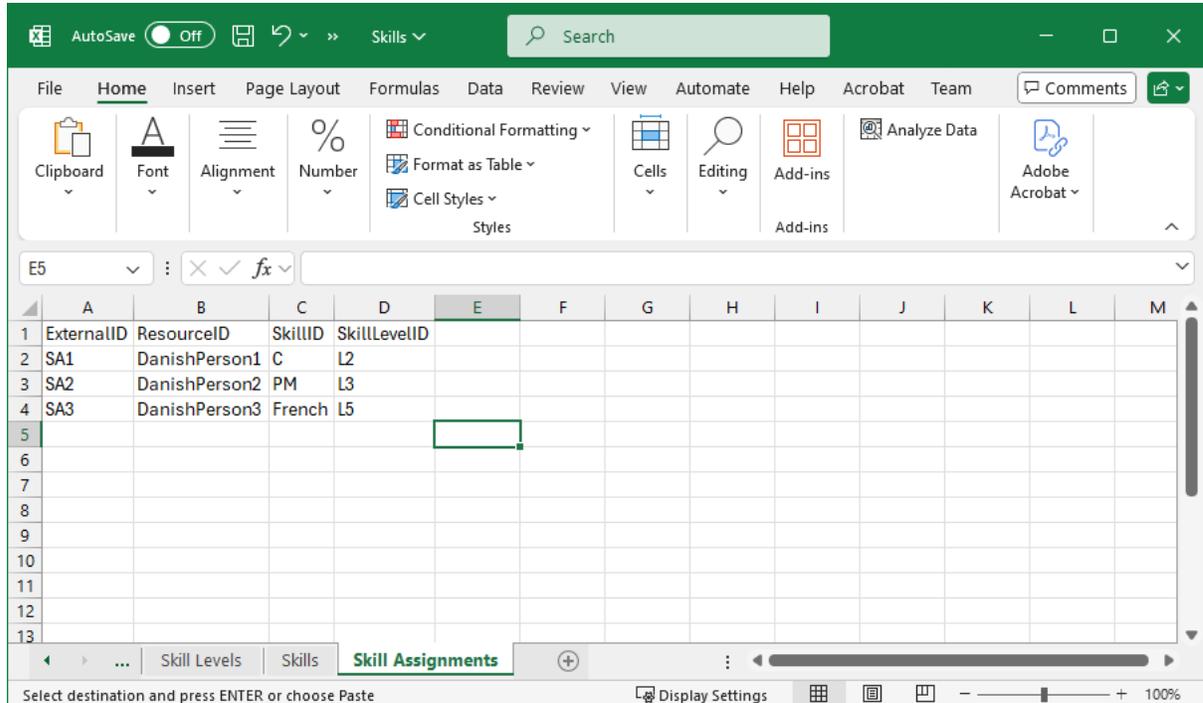
Now that the file format is ready, the next step is to create a custom import mapping in People Planner.

1. Go to **Tasks** » **Custom Import Mappings**.

2. Create a custom import mapping.

3. In the **Import Type** field, select **Excel** from the drop-down list.

4. In the **Server file path** field, enter the folder path of the file on the server to use when running the custom import mapping.

5. Click **Next**.

6. In the **Local sample file path** field, click **Select File** to choose your Excel file from your device.

7. Click **Add** to add the first mapping.

8. In the **Source Tab Name - Excel** field, select **Skill Level Lists** from the drop-down list.

9. In the **Destination Entity Name** field, select **Resources** » **Skill Level List** from the drop-down list.

10. Verify that the fields have been mapped correctly.

11. Click **Save**.

12. Click **Add** to add a second mapping.

13. In the **Source Tab Name - Excel** field, select **Skill Levels** from the drop-down list.

14. In the **Destination Entity Name** field, select **Resources** » **Parameters** » **Skill Level** from the drop-down list.

15. Verify that the fields have been mapped correctly.

> **Note:** You must map the external SkillLevelListID field to the internal PropertyLevelListID field manually. The difference in name is because Skills are actually called "Properties" internally in the People Planner database.

16. Click **Save**.

17. Click **Add** to add a third mapping.

18. In the **Source Tab Name - Excel** field, select **Skills** from the drop-down list.

19. In the **Destination Entity Name** field, select **Resources** » **Skills** from the drop-down list.

20. Verify that the fields have been mapped correctly.

> **Note:** You must map the external SkillLevelListID field to the internal LevelListID field manually.

21. Click **Save**.

22. Click **Add** to add a fourth mapping.

23. In the **Source Tab Name - Excel** field, select **Skill Assignments** from the drop-down list.

24. In the **Destination Entity Name** field, select **Resources** » **Skill Assignment** from the drop-down list.

25. Verify that the fields have been mapped correctly.

26. Click **Save**.

> **Note:** When you run this import mapping, only the Resources view is shown, but the four mappings import data into the following views:
>
> - **Views » Resources » Skill Level Lists**
> - **Views » Resources » Parameters » Skill Levels**
> - **Views » Resources » Skills**
> - **Views » Resources » Resources**

Import Time Registrations

The integration between People Planner and Maconomy supports import of Actuals, that is, of time registrations.The integration between People Planner and Maconomy supports import of Actuals, that is, of time registrations.

However, if the time registrations are stored in an external system, such as in a different ERP system, and you can export them from there to an Excel file, you can define an Import Mapping to import them into People Planner.

This is the simplest format that you can use.

This format assumes that:

- **EventID**: You know the ExternalID of the events (such as tasks) where the time is registered.

- **ResourceID**: You know the ExternalID of the employees who registered the time.

- The time should go into the TimeRegistration account.

- The TimeUnit must be one of the following: Day, Week, or Month. In addition, the Start date should be the first date in the period.

> **Note:** People Planner uses the European standard, where the week starts on Monday.

One way to know the external IDs could be because you already have import mappings that import the tasks and the resources.

Events and resources that are created directly from People Planner do not have external IDs. However, you could assign IDs to them by some other means, such as directly from the PG and RG or through a SQL script, and you would then be able to use those IDs.

To create the import mapping:

1. Go to **Tasks** » **Custom Import Mappings**.

2. Create a custom import mapping.

3. In the **Import Type** field, select **Excel** from the drop-down list.

4. In the **Server file path** field, enter the folder path of the file on the server to use when running the custom import mapping.

5. Click **Next**.

6. In the **Local sample file path** field, click **Select File** to choose your file from your device.

7. In the **Name** field, enter a name for the custom import mapping.

8. Click **Add**.

9. In the **Destination Entity Name** field, select **Entries** » **Time Registration Entry** from the drop-down list.

10. Verify that the fields have been mapped correctly.

11. Click **Save**.

You can now continue with creating a task specification and a scheduled task on top of this.

If the resource is not already assigned to the task, the custom import mapping does this automatically. This is in contrast with how you would enter time registrations via the PG; in that case, you would first need to assign the resource before you could start entering values in the time registration cells.

Settings

People Planner has several settings that you can use to customize its behavior. You access these settings in the Settings window..

The Settings window has two tabs: Settings and History.

Settings Tab

This section lists the settings that require additional information.

For more information about simple settings, the description of the selected setting is displayed when you hover over the tooltip question mark icon found at the rightmost side of the setting field in the Web Admin Tool.

To change a People Planner setting, find the setting you want to modify within this tab. Enter or change the value of the setting, then click **Save**.

The settings are organized into five main categories:

- System Setup

- Maconomy Integration

- Exchange Integration

- Data Auto Generation

- Early Adopter

System Setup

This section provides information regarding system settings for People Planner.

System

This section contains key settings for how the People Planner system should function, for example, what the smallest plannable time unit is.

Field	Description
Setting: Cookie Token Expiration (hours)	Enter the number of hours before the cookie that contains the token expired in Web Applications.
Setting: Default Perspective	Select the default displayed perspective when you start the People Planner Client.
Setting: Default Workday Start Time	Select the default start time for each workday.

Field	Description
Setting: Default Workday Length	Enter the default number of work hours for each workday.
Setting: First Day of Week	By default, People Planner assumes that each week starts with Monday. However, some customers may need the week defined to start on another day, such as Sunday or Saturday. Use this setting to configure which day on which the week should start.
Setting: Include Resource Manager in 'Resource Manager Datalimitation'	Select this setting to include the resource manager in the list of available resources when the 'where I am resource manager' data limitation is enabled.
Setting: Is company and department independent?	Select this setting to confirm that both the company and department are independent.
Setting: Keep log entries from the last monthsSetting: Keep log entries from the last months	Specify the number of months for which log entries should be retained. The log entries for the number of months indicated are excluded from the Delete Old Log Entries task.
Setting: MyPlan Use Maconomy SSO	People Planner supports OAuth2 and OpenId Connect (OIDC) for the standalone MyPlan. To enable OIDC for My Plan: ■ Select the My Paln Use Maconomy SSO setting. ■ Ensure that the Maconomy RESTful URL is configured. ■ Ensure Maconomy is configured for Maconomy generic third-party SSO. See OIDC Authentication for more information on the OIDC setup.
Setting: Smallest plannable time unit	Specify the smallest time unit to be used for planning.
Setting: The wake-up interval	Specify the wake up time interval in seconds for the task scheduler service.
Setting: Update reporting tables task end date	Specify the end date to use for Update Reporting Tables tasks.
Setting: Use UPN for authentication	Select this to utilize User Principal Name (UPN) for authentication. See User Authentication for more information.

Colors

These settings determine how booking cells should be colored, for example, what color to use when a resource is overbooked.

CV

These settings control which file-types can be accepted as part of a resource's Curriculum Vitae (CV).

Gantt UI

These settings control how the Gantt bars function and appear.

These settings are organized on four tabs as the following table describes.

Tab	Description
Gantt User Interface Settings	General functionality for Gantt-charts, for example the time span to use with the default assignment filter, or what should happen when a user double-clicks an event.
Text Color	The colors used for event and resource names. The default is black.
Gantt Stick Color	The colors used for the different types of Gantt bars.
Font Style	The font style used for event and resource names-that is, whether they should be styled in bold text.

Field	Description
Setting: Limit for Automatic Sortable Rows in a Calculated Column	You can sort on calculated columns in any of the Gantt views, including detailed views. This includes both custom and standard calculated columns.
	However, this sorting requires that all the column values are calculated before the sort is performed, which can result in a long response time before you see the sorted results. You can limit the maximum number of rows for which the required calculation time represents an acceptable wait time.
	If the number of rows involved in the requested sort is fewer than the limit that you set, the values are calculated synchronously, sorted, and displayed. If the number of rows involved in the requested sort is greater than the limit that you set, People Planner asks you to confirm that you want all the values in the column to be calculated. You can confirm the sort request or choose not to wait for the calculations and sort to be performed. In the latter case, People Planner displays the information without performing the calculations or the sort. Enter a value for this setting to choose the maximum number of rows. The default maximum number of rows is 200. You can set this value to any number between 1 and 10,000.

Deltek

Field	Description
Setting: Project Gantt Double-Click Assignments/ Events	You can configure the functionality that id provided when you double-click in certain areas of the Project Gantt (PG) in the Windows Application.
	Note: The double-click behavior is also described in the *Deltek People Planner Fundamentals Guide* under the "Show Information" section.
	To configure Double-Click Assignment and Double-Click Event in the PG:
	▪ In the **Project Gantt Double-Click Assignment** field, select a value from the dropdown list. For new installations, the default value is **None**. Otherwise, the default value is **Go to earliest date**.
	▪ In the **Project Gantt Double-Click Event** field, select a value from the dropdown list. For new installations, the default value is **None**. Otherwise, the default value is **Show information**.

General UI

These settings control more general UI functionality, such as how many decimals should be used to display bookings.

MyPlan/Scheduler

These settings control general functionality and the appearance of MyPlan and the Scheduler.

Notification

When a scheduled task fails, you can set up the system to send an email. Use this section to configure this.

Setting	Description
Mail server host name	The name of the mail server that is used to send the mail.
Port number	The port-number used on the server. The default is to use the normal SMTP port, 25.
Username	Login credentials for the mailbox that is used to send the email.
Password	
Email address PeoplePlanner	The From address on the email. It is recommended that you set this to a "No reply" email address.
Email address scheduled task	The email address of the user who needs to investigate and resolve any issues with failing scheduled tasks. You can enter multiple addresses separated by semicolons (;).

Project

This section contains key settings that affect the behavior of projects—for example if is it mandatory that a project has both a customer and a company, or should a project also be settled when it is closed.

Most settings are simple settings that control how projects are handled. More advanced settings are described in detail here.

Field	Description
Setting: Prevent Assignments on Projects and Summary Lines	By default, People Planner allows you to plan directly at the project level and on any summation level of a project; that is, you can assign resources and book them, as well.
	This is not compatible with Maconomy; in Maconomy, you cannot assign employees or employee categories directly on the job or on a sum/text budget line.
	You can enforce the same restrictions in People Planner by selecting the **Prevent assignments on projects and summary lines** checkbox.
	When this checkbox is selected, you cannot assign resources on either the project or any summation lines.
	Note: There may already be existing assigned resources on either a project or a summation line in the People Planner database. For example, this could happen if you update from an older version of People Planner where the setting did not exist. Another situation where this could happen is when assignments are created automatically as part of an actuals import. See the *Deltek People Planner Integrations Guide* for more information about actuals imports.
	If there are existing assignments, and the origin of the project is "Maconomy," the setting prevents you from making bookings on these assignments.
	The default value is off for a new People Planner database.

Azure Authentication

Azure configuration is only needed if you are using Azure Authentication for People Planner without a Maconomy System. If you have configured Maconomy to use Azure, you can configure People Planner to use UPN for authentication.

See Azure Authentication for more information.

Performance Tweaks

These settings enable you to configure how specific data is saved in the People Planner database.

You can choose whether to store 0 (zero) values, empty strings, and false values as null values instead.

When you enable a column for performance tweaking, the default value is changed to being represented by a null. There are three types of columns that this may apply to, as shown in the following table.

Type of Column	Tweak = Off (Use the "Empty Value")	Tweak = On (Use Null Value)
Number	0	null
String	""	null
Boolean/flag	false	null

For rows that contain values other than the empty value, the data remains the same in the database.

When working with data from a performance-tweaked column in the People Planner user interface (UI), it makes no difference to a user whether the column contains empty values or null values. The null values are for all purposes treated as the default values for the type of column.

The use of performance tweaks significantly reduces network traffic; this improves performance. Null values are more efficient to transfer than 0, "", or flags.

The more rows in the columns with empty fields, the more is gained from using the performance tweak.

The only situation where the actual representation of null values makes a difference is when the columns are used in import mappings. There it matters whether you expect to import nulls or zeros. If you have customized SQL scripts that use some of these columns for calculations, those scripts might not work, or in the worst case, they might return wrong values when null is returned instead of 0.

> **Tip:** If you do not use import mappings, be sure to select all of the checkboxes in the Performance Tweaks tab in the Web Admin Tool Settings.

	Column Name
Events	Value1 - Value10
	Flag1 - Flag10
	Auto-calculate Booking Hours
	IsFromPrototype
Resources	Value1 - Value10
	Flag1 - Flag10
Assignments	IsFromPrototype

When you toggle a column's check box, the database is updated, and the column's value is changed from 0 to null or back again, depending on whether you select the checkbox or you deselect it.

To ensure the best possible performance, in the Performance Tweaks tab you should select all of the columns that can safely use null instead of 0/false and click **Save**.

In People Planner 3.6.1 CU04

The performance tweaks were first introduced in People Planner Release 3.6.1.

As the default in that release, all of the performance tweaks were disabled, both for new databases and for existing databases. This was done to ensure backward compatibility with earlier releases.

To get the benefit from the performance tweaks, you needed to go through the manual process of selecting which fields in People Planner to set the tweak on.

In People Planner 3.8

When a system is upgraded to People Planner 3.8, and it is detected that none of the tweaks are selected, it is assumed that no one has done this manual selection of columns to optimize on. When this is the case, the People Planner Web Admin Tool applies the optimization itself.

As part of the upgrade, all columns that are available for performance tweaks are examined. If a column contains the default value only, the performance tweak is activated for that column.

It is still a good idea to manually go through the columns, and if they are not used in import mappings, activate the performance tweak. If any tweaks are selected by the upgrade, but you plan to use the columns in import mappings, you can remove the tweak setting.

Web Component

These settings control general functionality and the appearance of the People Planner Web Components.

Field	Description
Setting: Enable Auto-Save in Web Components	You can enable the auto-save setting in the Web Components to ensure that your changes are reflected in the system without having to click the **Save** action. Select the **Automatically save changes in Web Components** checkbox to use this feature. This setting automatically saves changes when you edit the following: ■ **PG main grid**: **From** and **To** columns ■ **PG/RG detail grids**: **Assignment Text** column ■ **PG/RG details Gantt**: Bookings **Note:** this saves changes each time a cell is edited and will affect the system's response time. When this is enabled, the Save and Undo buttons in the toolbar are hidden.

Field	Description
Setting: Disable Assignments in Capacity Pane	You can prevent users from expanding the assignment subgrid in the RG in the Web Components. Select the **Disable assignments in Capacity Pane** checkbox to use this functionality. When enabled, users cannot view and potentially edit planning on projects that are not under their responsibility.

Maconomy Integration

This section provides information about Maconomy integration settings.

General

The settings in the General section are divided into five subsections.

Section	Description
General	Settings that controls how the combined People Planner and Maconomy work. These settings are mostly relevant where People Planner is embedded in the Maconomy WSC.
MaconomyWS	Settings used for calling the MaconomyWS Web service. This Web service is used, for example, for importing master data from Maconomy into People Planner.
REST API	Settings used for calling the Maconomy RESTful Web service. People Planner uses this Web service for newer types of imports, for example, for importing absences or calendars.
Project Manager Substitutes	Settings used for providing project manager access to Maconomy employees assigned as substitute project managers.
Silent Sign In	Settings that control the People Planner Silent Sign In functionality.

General

This section controls how data is logged in People Planner. This includes logging web service messages and results when importing data from Maconomy.

For more details about the log web service, see the *Deltek People Planer Integrations Guide*.

MaconomyWS

The *Deltek People Planner Technical Installation Guide* describes how to set up the call from People Planner to the MaconomyWS Web service. The *Deltek People Planner Integrations Guide* provides more details on how this works.

REST API

The *Deltek People Planner Technical Installation Guide* describes how to set up the call from People Planner to the Maconomy RESTful Web service. The *Deltek People Planner Integrations Guide* provides more details on how this works.

Project Manager Substitutes

This setting provides project manager access to employees who have been assigned as substitute project managers on a job imported from Maconomy. They are given the same privileges as the project manager for that specific project.

> **Note:** Project manager privileges are enforced on a project level, which means this applies to all tasks under the project. If an employee is a substitute project manager on the project, they can also edit any task, even if they are not set for each individual task.

Silent Sign In

The People Planner SI functionality ensures that you can log in to the Maconomy WSC and from there access the embedded People Planner Web Components without having to log in to People Planner as well.

The *Deltek People Planner Technical Installation Guide* describes how to set up the People Planner SSI on both the People Planner and the Maconomy sides of the integration. The *Deltek People Planner Integrations Guide* provides more details on how SSI works.

Master Data

This section controls how master data is imported from Maconomy into People Planner.

See the *Deltek People Planner Integrations Guide* for more details about importing Master Data from Maconomy.

The settings of the Master Data section are organized under two tabs as described in the following table.

Tab	Description
Task Type Parameters	These settings are shared among every task specification that imports Master Data.
Default Local Parameters	When you create a task specification to import Master Data, these parameters are used to set the defaults. You can then edit the task specification where you want something other than the default.

Projects

These settings are organized on two tabs.

Importing projects from Maconomy is described in detail in the *Deltek People Planner Integrations Guide*, including the descriptions of the settings that relate to this.

Table	Descriptions
Task Type Parameters	These settings are shared among every task specification that imports projects.
Default Local Parameters	When you create a task specification for importing projects, these parameters are used to set the defaults. You can then edit the task

Table	Descriptions
	specification where you want something other than the default.

Field	Description
Setting: Allow Deletion of Tasks with Planning and/or Actuals	You can enable the deletion of budget lines that no longer exist in Maconomy as part of a project import from Maconomy to People Planner by using the **Allow deletion of tasks with planning and/or actuals** task type parameter. If this parameter is selected, budget lines that no longer exist in Maconomy are deleted from People Planner, even if they contain planning or actuals information that was created in People Planner. **Warning:** If the **Allow deletion of tasks with planning and/or actuals** task type parameter is selected, and no corresponding budget line exists in Maconomy, the tasks and summary lines are deleted during any project import, even if the task or summary line has assignments or allocations, such as planned hours, that were created in People Planner. **When this information is deleted, it is lost, and the deletion cannot be undone.** If you do not select this parameter, the default behavior is to delete only those budget lines that do not have planning information.
Setting: Delete Project if Deleted in Maconomy	With this setting, projects are automatically deleted in People Planner when they are deleted in Maconomy. When—and only when—you have selected the Delete project if deleted in Maconomy checkbox, you get access to a new Task Specification type, Delete Projects Deleted (and Optionally Closed). You can use this to set up a scheduled task that performs the actual deletions of the projects in People Planner. Setting: Delete Project if Closed in Maconomy (After Period) The option to automatically delete projects from People Planner when they are closed in Maconomy is useful to avoid the accumulation of a large number of projects in People Planner over time. This functionality deletes all project history, including all planning, and you cannot restore that history later. However, you can specify that a period of time after the project was closed in Maconomy must elapse before the project is deleted from People Planner. **Note:** This setting is only enabled if you also select the **Delete Project if Deleted in Maconomy** check box. If you do not select that setting, the value of the **Delete Project if Closed in Maconomy (After Period)** setting is always **Never**. To enable this setting:

Field	Description
	1. Go to **Settings** » **Maconomy Integration** » **Projects** » **Task Type Parameters**.
	2. Select the **Delete project if deleted in Maconomy** checkbox.
	3. Select one of the options in the drop-down list:
	▪ Never
	▪ Immediately
	▪ One week
	▪ One month
	▪ Three months
	▪ Six months
	▪ One year
	▪ Two years
	▪ Three years
	The default value is **Never**, which means that projects are not deleted-even if they are closed in Maconomy. This is the normal behavior before People Planner 3.8, where this setting was introduced.
	If the **Delete project if closed in Maconomy (after period)** value is set to anything other than **Never**, and you click **Save**, the following warning is displayed:
	Warning: The setting **Delete project if closed in Maconomy (after period)** will permanently delete ALL project data for all relevant jobs.
	4. Click **Yes** to confirm, or **No** to cancel.
	5. Click **Save**.
	After you have set selected the setting, you must set up a scheduled task to do the actual deletion of the projects. See the **Delete project if deleted in Maconomy** setting for information about how to do this.
	The "after period" that you specify for the **Delete project if closed in Maconomy (after period)** setting is relative to a project's close date. Depending on when the task is executed, the project might not be deleted exactly after the specified period; thus, the specified period is the earliest time when the project will be deleted.
	For example, if you close a project in Maconomy on January 31, and you select the **Delete project if closed in Maconomy (after period)** setting, and you set the After Period value to 3 months, the project will be deleted from People Planner the first time that the Delete Projects Deleted (and Optionally Closed) in Maconomy task is executed on or after May 1.

Field	Description
	This setting has no dependency on the **Allow deletion of tasks with planning and/or actuals** setting. Closed projects that have planning are deleted regardless of whether or not you selected the Allow Deletion of Task with Planning setting.
Set the Import Project Default Parameters	Using the Web Admin Tool, you can set default values for the import project local parameters that are used by the **Update from Maconomy** button in the Project Gantt (PG) and the default parameters that are used in the Import Project view. You can set default values for these parameters: ▪ **Use dates from Maconomy**: Select this checkbox to use dates from Maconomy. The value that you set here is used as the default value when tasks are created in People Planner. However, the **Update from Maconomy** button does not use this setting. ▪ **Budget type**: Choose a budget type from the dropdown list. The dropdown values are those that have been imported via Master Data import. If no Master Data import has been performed, the dropdown list is empty. If you reimport budget types through a Master Data import that no longer contains the budget type that was specified as the default value here, the Master Data import creates a warning in the log file so that you can update the default value to a valid value. The value that you set here has no effect when you create import project task specifications or when you use the **Update from Maconomy** button. To set import project default parameters: 1. Go to **Settings** » **Maconomy Integration** » **Projects** » **Task Type Parameters**. 2. Select the appropriate setting for the parameter(s) as described in the preceding section 3. Click **Save**.
Set an Imported Project as Read-Only	Using the Web Admin Tool, you can set default values to determine whether a project imported from Maconomy should be read-only for all users. You can set up a job in Maconomy as read-only using a **Customer PopUp 1-5** or **Boolean 1-5** field before it is imported to People Planner, or you can set this up manually in People Planner for each job. **Note:** This setting overrides all other privileges to edit projects, even when the user is a project manager or project manager substitute. However, if the **Allow editing of read-only projects in Project Management** setting is enabled, certain users can edit read-only projects in the project management workspaces. Refer to the description on the

Field	Description

	Allow editing of read-only projects in Project Management setting below for more information.
	
	You can set default values for these parameters:
	
	▪ **Value of field to denote that the project is not editable** - Select one of the following options from the drop-down list:
	
	   ▪ **None**: Choose this option if you do not want to enable the read-only functionality.
	
	   ▪ **Customer PopUp 1-5**: Select the field used in Maconomy to determine whether this project should be read-only.
	
	   ▪ **Boolean 1-5**: Select the field used in Maconomy to determine whether this project should be read-only.
	
	▪ **Text value of field to denote that the project is not editable** - This field is enabled only when you select a **Customer PopUp 1-5** field in the **Value of field to denote that the project is not editable** parameter. If the value of this field is the same as the **Customer PopUp 1-5** fields on the project from Maconomy, it should be read-only.
	
	▪ **Boolean value of field to denote that the project is not editable** - This field is enabled only when you select a **Boolean 1-5** field in the **Value of field to denote that the project is not editable** parameter. Select this checkbox to enable the read-only functionality. If the value of this field is the same as the **Boolean 1-5** fields on the project from Maconomy, it should be read-only.

Allow Editing of Read-Only Projects in Project Management	In People Planner, the ability to edit projects is limited to specific users based on: ▪ Their user role (for example, a project manager or project manager substitute). ▪ Enablement of the **Value of field to denote that the project is not editable** setting. ▪ Those who have the **Edit projects where you are not Project Manager** privilege. When you enable the **Allow editing of read-only projects in Project Management** setting, anyone can edit projects in the Project Management workspaces. This applies to projects that are set as read-only due to the **Value of field to denote that the project is not editable** setting, as well as projects that cannot be edited because the user does not have a project manager or substitute user role or editing privileges. This allows you to effectively make designated projects read-only when accessed in the Resource Management workspace, while making them editable only in the Project Management workspaces for users with relevant access.

Actuals

This section controls how actuals, that is, time registrations, are imported from Maconomy.

See the *Deltek People Planner Integrations Guide* for more details about importing actuals.

Exchange Integration

These settings affect the configuration of the integration between People Planner and Exchange/Outlook.

TSee the *Deltek People Planner Technical Installation Guide* and the *Deltek People Planner Integrations Guide* for more details about how to install and configure this integration.

Data Auto Generation

Use these settings for configuring functionality related to data generation.

Performance Data

These settings are used for generating big test databases that are used for evaluating performance.

Demo Data

These settings are used for generating demo data.

Field	Description
Setting: Import Templates	Use this setting to specify whether job templates should be included when using Maconomy REST to import jobs. When this is enabled, if a new job is imported from Maconomy, the import checks for a template job number and whether it was already imported to People Planner before. If the template exists in People Planner, any new assignments on tasks in the template are copied to the new job, provided that these tasks already exist on the new job as well.

Early Adopter

These settings allow you to test various functionalities that are not yet publicly available.

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

General

These settings allow you to test general functionality in People Planner.

Actuals Import

These settings allow you to test functionality related to actuals imports.

History Tab

This tab shows the history of changes made to the default settings. You can view both the current and previous values of a setting.

Authentication

This section describes authentication methods used for People Planner.

User Authentication

The People Planner user authentication looks up "the user" in the People Planner database User table to determine if "the user" has permission to run People Planner.

Because none of the People Planner applications provides a login dialog, "the user" is determined in one of the following ways:

- Windows Authentication. "the user" = The Windows user name
- People Planner Silent Sign In (SSI). "the user" = User name encoded in token
- Azure Authentication. "the user" = UPN returned by Azure

> **Attention:** This Azure configuration is only needed if you are using Azure Authentication for People Planner without a Maconomy System. If you have configured Maconomy to use Azure you can configure People Planner to use UPN for authentication.

User information is stored in the People Planner database's User table. Users are normally imported from Maconomy as a part of the Master Data import, but they can also be imported from an Excel or CSV file.

User authentication is essentially invisible to the user because it happens "under the hood." A user only becomes aware that something went wrong if the user authentication fails.

When a user starts People Planner, there are the following possible types of authentication:

- Windows Authentication
- People Planner Silent Sign In (SSI)
- Azure Authentication

> **Attention:** This Azure configuration is only needed if you are using Azure Authentication for People Planner without a Maconomy System. If you have configured Maconomy to use Azure you can configure People Planner to use UPN for authentication.

Windows Authentication and People Planner SSI

Windows Authentication is used when you have already logged in to Windows, and you then start the People Planner Windows Application.

It is also used when you access MyPlan directly from a browser. If you access MyPlan or the People Planner WSC Components via the Maconomy Workspace Client instead, the system uses the People Planner Silent Sign In functionality to authenticate you.

Both Windows Authentication and PP SSI rely on the following fields in the User table:

- NetworkUserName

- NetworkDomainName

- NetworkDomainAlias (Normally set as a local parameter of the People Planner import task specification)

The **NetworkUserName** and **NetworkDomainName** properties are normally retrieved from Maconomy using a Master Data import task. The **NetworkDomainAlias** property is not retrieved from Maconomy, but can be set as a part of defining the Master Data import task.

> **Tip:** People Planner uses the MaconomyWS Web Service to retrieve the users. The default mapping returns UserRoleInformation.NetworkUserName and UserRoleInformation.NetworkDomain.Name. The **getUsersMQ** Web Service query fetches the users; it is defined in the Maconomy **AccessControl.l** file.
>
> This query uses the **UsersAndGroupsU** universe to request the data. You can customize this universe and map other fields or define default values if the fields are empty.
>
> You can also use the .l file to modify the data that is returned to People Planner. This is important to realize because these properties (NetworkUserName and NetworkDomainName) are used for user authentication.
>
> When running a People Planner application using Windows Authentication or People Planner SSI, the user-"the user" being a Windows Account name, the UPN name, or the name that is embedded in the PP SSI-token-is validated against the NetworkUserName, NetworkDomainName, and NetworkDomainAlias properties. If People Planner can find the user in its database, the user is logged in.
>
> People Planner SSI is described in more detail in the *Deltek People Planner Technical Installation Guide* and in the *Deltek People Planner Integrations Guide*.

Authentication Using UPN Name

By default, the People Planner Windows Application uses the Down-Level Logon Name for Windows Authentication.

In version 3.7.1, an option was added to use the User Principal Name (UPN) instead.

The **Use UPN name for Authentication** option is located via **Settings** » **System Setup** » **System** in the Web Admin Tool. If you select this setting, when the People Planner Application is started, the method that it uses to get the name of the current logged-in user gets the UPN name, rather than the Windows account name.

In some rare setups, and under special situations, such as using an SSO solution to access People Planner via Citrix, an issue can arise with the length of user names in the Active Directory (AD). For example:

1. A user logs in to Citrix with their remote identity provider credentials, such as Azure Active Directory.

   This user also has a shadow account in the Citrix local AD so that they can launch the People Planner application. The shadow account has a separate UPN suffix that matches the remote domain name in Azure.

2. The user's account in Azure is JonathanBakerSmithIII@ABCManufacturing.com.

3. His account in the Citrix local AD is as follows:

- Primary domain: <Local AD domain name>

- Windows user name (SamAccountName): JonathanBakerSmithIII

- UPN: JonathanBakerSmithIII@ABCManufacturing.com (ABCManufacturing.com is the UPN suffix)

When shadow accounts are created, the SamAccountName in the local AD, the user name, is limited to 20 characters, which is a problem if user names are longer than 20 characters in Azure, as "JonathanBakerSmithIII" is, at 21 characters. When People Planner retrieves the Windows account user name, it gets the truncated user name; as a result, the validation of that name against the database-which has the full name-fails.

Note: The method that is used to retrieve the UPN returns the name of the currently logged in user that is running the process. For People Planner Web applications, this user is the system service account that is running the Internet Information Server (IIS) process, and not the user account. Because of this, you cannot use the UPN Authentication when you are running MyPlan from a browser.

Azure Authentication

Azure Authentication is used as an alternative to Windows Authentication.

When you want to log into People Planner, you are first presented with an Azure login screen. When you fill this in correctly, you are logged into People Planner. This type of authentication can be used in situations where the user is not on the same domain as the People Planner application.

Azure Authentication relies on the following fields in the User table:

- Email

- AzureUPN

When running a People Planner application using Azure Authentication, the user-"the user" being the UPN returned by Azure-is validated against the Email and AzureUPN properties. If People Planner can find the user in its database, the user is logged in.

In the following sections, the authentication process for each of the People Planner components is described.

People Planner Azure AD authentication is only needed if you are running MyPlan as a standalone web application and the end user is authenticating via Microsoft Azure AD.

Azure AD authentication can also be used in certain security service scenarios.

If you have configured Maconomy to use Azure AD authentication and the end user is authenticating via Microsoft Azure AD when running the People Planner Windows application, you can configure People Planner to use UPN for authentication in **System Settings** » **System** » **Use UPN for Authentication**.

See Azure Authentication for more information on how to set this up.

The People Planner Windows Application

The Windows Application starts by connecting to the Security Service specified in the Windows Application Configuration file (see the *Deltek People Planner Technical Installation Guide* for more information) using either Windows Authentication or Microsoft AzureAD authentication.

The Security Service uses the configuration file parameters ServerDataConnectionFile and ClientDataConnectionFile to identify the People Planner System (database). It is strongly recommended to use the same Data Connection file for the two parameters, and that the Data Connection file specify only one People Planner system (database). If you are using the recommended configuration, you can ignore the paragraphs that are shown in italics (below). If you need the People Planner Windows Application to be able to connect to different People Planner systems you should simply install a Security Service for each of those systems, in which case the Windows Application prompts you to choose which system before starting.

Based on the People Planner system (database) specified in the ServerDataConnectionFile setting, the Security Service returns a list of supported authentication methods. As of Release 3.8.6, the People Planner Windows Application supports Windows Authentication and Azure Authentication.

*If more than one People Planner system is specified, the one named **default** is used, and if the default does not exist, the first is used.*

If the Azure Authentication parameters in the People Planner database are set for the specified system, the returned list includes Azure Authentication (and the required information to reach the Azure AD). The Windows Application uses Azure if supported; otherwise, it uses Windows Authentication (which is always supported) for all subsequent communication with the Security Service.

Next, the Windows Application queries the Security Service for which People Planner system (database) to use. Normally, this is the same as the one used to get the supported authentication methods, and the Windows Application now connects using the preferred authentication *method as described above.*

If the ClientDataConnectionFile contains multiple connections, the Windows Application shows a Data Connection selection dialog before connecting.

> **Note:** If the ClientDataConnectionFile contains multiple connections (multiple People Planner Databases) there is a risk that these systems are not configured to use the same authentication method, and hence not work as expected. For example:
>
> - *Security service uses Azure authentication, but the Windows Application uses Windows authentication:*
>
>   *You are prompted for Azure credentials to communicate with the security service, but you will use Windows credentials (silently) to communicate with the People Planner Database.*
>
> - *Security service uses Windows authentication, but the Windows Application uses Azure authentication:*
>
>   *You are not prompted for authentication to communicate with the security service, but will be prompted for Azure credentials to communicate with the People Planner Database.*
>
> - *Security service uses Azure authentication for "Tenant A," but the Windows Application uses Azure authentication for "Tenant B" (that is, two different People Planner Databases):*

> *You are prompted for Azure credentials for "Tenant A," and will try to use the same Azure credentials to communicate with "Tenant B."*
>
> *This scenario will not work!*

If Azure Authentication is not configured--meaning that the **Azure Login URL**, **Server Resource Id**, **Tenant Domain**, and **People Planner Application Id** are all specified--it uses Windows Authentication instead.

When using Windows Authentication, the People Planner Windows Application gets the identity of the current Windows user from the Windows Account or the UPN. The **Use UPN for Authentication** setting determines which is used.

The retrieved identity (user name and domain name) is validated against the User table of the People Planner database as follows:

- The user name is validated against the NetworkUserName property.

- If a match is found, the domain name is then validated against the NetworkDomainName and NetworkDomainAlias fields. If either of these is a match, the user is logged in. Otherwise, the login fails.

When using Azure authentication, the People Planner Application always displays an Azure Login Popup. Execution of the People Planner code is suspended until the user finishes interacting with the login popup.

The People Planner application receives the identity of the user from Azure. The email address that represents this identity is validated against the Email and AzureUPN fields in the User table in the People Planner Database. If a match is found in either of these, the user is logged in; otherwise, the login fails.

The People Planner Windows Application always reauthenticates every time it is restarted. However, no re-authentication is performed for the entire session during which the client remains open.

The People Planner MyPlan Web Application

The MyPlan Web application supports Windows Authentication, Azure Authentication, and People Planner SSI authentication.

> **Attention:** Azure configuration is only needed if you are using Azure Authentication for People Planner without a Maconomy System. If you have configured Maconomy to use Azure you can configure People Planner to use UPN for authentication.

When using Windows Authentication, the user validation is the same as described for the People Planner Windows Application. However, if the **Use UPN for Authentication** setting is used, the validation fails. This is a known issue.

When using Azure authentication, MyPlan redirects to an Azure Login Page and receives the identity of the user from Azure. The email address that represents this identity is validated against the Email and AzureUPN fields of the User table in the People Planner Database. If a match is found in either of these, the user is logged in; otherwise, an error page is displayed.

To use People Planner SSI Authentication, an SSI token parameter must be passed as part of the URL. If no token is passed, and Azure Authentication is not configured--meaning that the **Azure**

Login URL, **Server Resource Id**, **Tenant Domain**, and **People Planner Application Id** are all specified--it uses Windows Authentication.

Maconomy calls the People Planner API Web service to request to get an SSI token for the current Maconomy user. When Maconomy later calls the embedded People Planner Web application, it then includes the SSI token in the URL.

The current Maconomy user is identified by the Maconomy UserRoleInformation.NetworkUserName and UserRoleInformation.NetworkDomainName in the Maconomy database.

The request to get an SSI token is encrypted, and People Planner must first be able to decrypt it to see which Maconomy user the request is for. If this is successful, the People Planner API returns a valid SSI token, with User name and Network domain name in it. If it is not successful, it returns an empty SSI token instead. The failure is logged in the People Planner API's own log file. Regardless of the success or failure, the returned SSI token is also encrypted.

> **Note:** The Maconomy user in the request is not validated against the People Planner's database at the point of the request, so Maconomy might get a token for a user that does not exist in the People Planner User table. This is a known issue. However, when Maconomy uses the token (as described in the following information) authentication fails.

When Maconomy launches MyPlan, the SSI token is appended to the MyPlan URL. MyPlan decrypts the token to get the user name and network domain name.

It then validates this against the user-table as follows:

- The user name is validated against the NetworkUserName property.

- If a match is found, the domain name is then validated against the NetworkDomainName and NetworkDomainAlias fields. If either of these is a match, the user is logged in. Otherwise, the login fails.

The People Planner Web Components

The People Planner Maconomy Web Components support Windows Authentication and People Planner SSI Authentication.

> **Note:** Because the Web Components are intended to be embedded in the Maconomy Workspace Client and cannot run directly in a browser, they are usually configured for People Planner SSI.

To use People Planner SSI Authentication, an SSI token parameter must be passed in the components' URL. If no token is passed, Windows Authentication is used.

Whether using People Planner SSI or Windows Authentication, the user validation works exactly as described for MyPlan.

The People Planner Service

The People Planner Service is a Windows service. During installation, you are required to specify a Windows account under which it will run.

This can be a local account, or it can be an account that you specially created for this purpose alone.

When the People Planner Service is started, these credentials are validated against the User table of the People Planner Database. This means that the account must also be a People Planner user.

The People Planner Service validates this against the user table:

- The user name is validated against the NetworkUserName property.

- If a match is found, the domain name is then validated against the NetworkDomainName and NetworkDomainAlias fields. If either of these is a match, the user is logged in. Otherwise, the login fails.

See the *Deltek People Planner Technical Install Guide* for more details about how to install the People Planner Service and configure the account.

Web Server Authentication

Because the People Planner Web applications require an Internet Information Server (IIS) and cannot run under Apache, for example, the alternative term of **IIS Authentication** is often used.

The People Planner installers select the correct type of IIS authentication for the Web components, and you usually do not need to do anything else in addition to the final configurations.

When you configure a Web site or Web service on an IIS, you can choose between different types of authentication. People Planner supports two of the types as described in the following table.

Web Component	Used For	IIS Authentication
MyPlan	Running MyPlan in a browser.	Windows Authentication
MyPlanWSC	Running MyPlan embedded in the Maconomy Workspace Client.	Anonymous Authentication
People Planner API	Web service used in the integration with Maconomy.	Anonymous Authentication
People Planner Outlook Web Service People Planner Outlook Web Service	Web service used in the integration with Exchange and Outlook.	Windows Authentication
People Planner Web Components	Running the Budgeting Assistant, Project Evaluation Assistant, and Project Overview Component,	Anonymous Authentication

Web Component	Used For	IIS Authentication
	embedded in the Maconomy Workspace Client.	
People Planner Web Service People Planner Web Service	(Only listed here for completeness.) This Web service is used in an extended integration with Maconomy and is only used by a specific customer.	Anonymous Authentication
People Planner Security Service	Required by the People Planner Windows Application to retrieve information about which database to connect to.	Anonymous Authentication Windows Authentication

While you can configure the MyPlanWSC client and the People Planner Web Components for using Windows Authentication, when using SSI you should configure them to use Anonymous Authentication.

With Anonymous Authentication, you also need to specify a People Planner user. This is a general requirement for Anonymous Authentication, and it makes sense to use the same user for MyPlanWSC and the People Planner WSC Component as you are using for the People Planner API Web service.

People Planner SSI and User Credentials

When you start the People Planner Windows Application, you are automatically logged in using your Windows credentials.

This mean that you do not need to do anything at all; if you are logged in to Windows, and you are added as a user in the People Planner database, you are automatically logged in without an extra login prompt.

If you use the Maconomy Workspace Client instead, and from there you access the embedded People Planner Web Components, you are logged in to People Planner via the Silent Sign In (SSI) functionality.

Instructions for setting up People Planner SSI are provided in both the *Deltek People Planner Technical Installation Guide* and in the *Deltek People Planner Integrations Guide*; thus, this information is not included here. The following information describes only how user credentials work under SSI.

User Credentials on the Maconomy Side

For SSI to work, the fields in the **Network Username** group for user setup must have values in Maconomy.
In addition, these values must be the same in the Users view in People Planner. This is usually achieved automatically by importing Master Data from Maconomy into People Planner, and you do not need to do anything more.

Deltek

> **Warning:** You should take care to ensure that there is not an .I file that modifies the credentials during the import from Maconomy. If the credentials in Maconomy and in People Planner are not the same, SSI will not work.

Maconomy 2.3 introduced User Roles. Exactly one of the roles can be marked as **Use for People Planner**, and the Network Username is moved to that role.

User Credentials on the People Planner Side

Normally you import users from Maconomy into People Planner as part of the import of Master Data. If this is the setup process that you perform, the fields in the **Network Username** group for user setup are imported as well, which takes care of setting up these values on the People Planner side.

Azure Authentication

The Azure Authentication functionality introduces an alternative authentication method that enables you to configure People Planner or MyPlan to allow users to log in using their credentials from the Azure Active Directory.

> **Attention:** This Azure configuration is only needed if you are using Azure Authentication for People Planner without a Maconomy System. If you have configured Maconomy to use Azure you can configure People Planner to use UPN for authentication.

By default, People Planner's and MyPlan's method of authentication relies on Windows Authentication for user login. Windows handles the user login, and People Planner and MyPlan compare the username of the currently logged-in Windows user to the list of users in the database. If it finds that username, it loads the People Planner Windows application or MyPlan using the privileges and settings that are defined for that user. To switch to a different user in People Planner or MyPlan, the current Windows user must log out of Windows and then log in using a different user account.

You can use Azure Authentication instead of Windows Authentication, if preferred.

> **Note:** Typically, MyPlan is configured to use Window Authentication in the IIS. When using Azure Authentication, you must enable Anonymous Authentication, and disable Windows Authentication.

When People Planner or MyPlan starts, it displays a login screen instead of retrieving the username of the current Windows user. From that login screen, a user can enter their credentials in Azure, which People Planner or MyPlan then matches against the list of users in the database. People Planner or MyPlan then loads with the privileges and settings of the logged-in user with those Azure credentials. When you use this authentication method, users do not need to log out of Windows to switch to a different user account.

> **Note:** When you set up an application-such as People Planner or MyPlan-in Azure, you provide a name for that application. That name appears as the heading in the login dialog. For example, if you give People Planner the name *People Planner Client* when you set it up, the dialog heading becomes *People Planner Client*, although the dialog is actually an Azure login dialog.

Use Azure Authentication with the People Planner Windows Application

When you have configured Azure Authentication as described in this section, and a user starts the People Planner Windows application, it displays an Azure login popup.

The execution of People Planner code is suspended until the user completes their interaction with this login popup.

After a user has succeeded in logging in, People Planner receives their identity from Azure. The email address that represents this identity is compared to the list of email addresses of People Planner users in People Planner's database. When a match is found, the user record in People Planner is used to load People Planner.

Use Azure Authentication with MyPlan

When you have configured Azure Authentication as described in this section, and a user starts MyPlan, it displays an Azure login popup.

The execution of MyPlan code is suspended until the user completes their interaction with this login popup.

After a user has succeeded in logging in, MyPlan receives their identity from Azure. The e-mail address that represents this identity is compared to the list of e-mail addresses of MyPlan users in MyPlan's database. When a match is found, the user record in MyPlan is used to load MyPlan.

Configure the Azure Active Directory Tenant

To use Azure Authentication, you must set up the Azure Active Directory Tenant, which contains users, user information, registered applications, and security.

> **Tip: If you already have an Azure Active Directory Tenant, you can skip this procedure.**

To set up an Azure Active Directory Tenant:

1. Log in to manage.windowsazure.com.
2. In the left menu, click **ACTIVE DIRECTORY**.
3. Click **NEW » APP SERVICES » ACTIVE DIRECTORY » CUSTOM CREATE**.
4. Select **Create new directory** from the **DIRECTORY** drop-down list.
5. Enter appropriate values for the **NAME**, **DOMAIN NAME**, and **COUNTRY OR REGION** fields.
6. Click **OK**.

Deltek

Set Up Users

People Planner users must exist in the Active Directory Tenant to use Azure Authentication. People Planner uses the user's e-mail address during authentication and matches it against the e-mail addresses that are contained in People Planner's own Users table.

To set up users in the Active Directory Tenant:

1. In the Active Directory Tenant,. navigate to the USERS tab.
2. Click **ADD USER** in the bottom menu and follow the wizard's steps.

> **Warning:** People Planner does not support automatically importing users from Azure. After you add users to the Azure Active Directory Tenant, you must manually configure those users in People Planner. Using People Planner's Web Admin Tool, you can import users from a file.

Set Up the People Planner Azure Authentication Server

The People Planner Azure Authentication Server is the common application against which People Planner Windows application users and MyPlan users authenticate.

To set up the Azure Authentication Server, complete the following steps:

1. In the Active Director Tenant, navigate to the APPLICATIONS tab.
2. Click **ADD** in the bottom menu.
3. Select **Add an application my organization is developing**.
4. Enter a name for the application, such as People Planner Authentication Server.
5. In the **Type** field, ensure that the **WEB APPLICATION AND/OR WEB API** radio button is selected.
6. In the **APP ID URI** field, enter the domain of the Active Directory Tenant, followed by a string to represent the application. For example: https://mmpeopleplanner.onmicrosoft.com/peopleplannerauthenticationserver/

> **Note:** The sign-on URL is not used; thus, it can be any valid URL.

Set Up the People Planner Application in Azure

Use the steps in this section to set up the People Planner application.

Register the People Planner Application in Azure

To use Azure authentication, you must register the People Planner application in Azure and configure it to authenticate against the People Planner Azure Authentication Server.

To register the People Planner application and configure it to authenticate against the authentication server:

1. In the Active Director Tenant, navigate to the APPLICATIONS tab.

2. Click **ADD** in the bottom menu.

3. Select **Add an application my organization is developing**.

4. Enter a name for the application, such as People Planner Client.

5. In the **Type** field, ensure that the **NATIVE CLIENT APPLICATION** radio button is selected.

6. Enter any valid URI in the **REDIRECT URI** field, because the redirect URI is not used.

Allow Access to the People Planner Azure Authentication Server

The registered People Planner Windows application in Azure must have privileges to authenticate against the People Planner Azure Authentication Server application.

To set access privileges so that the registered People Planner application can authenticate against the People Planner Azure Authentication Server:

1. In the Active Directory Tenant, navigate to the APPLICATIONS tab.

2. Select the People Planner Windows application and click the right arrow next to the name.

3. Click the CONFIGURE tab.

4. Click **Add Application** under **Permissions to other applications**.

5. Select **All Apps** from the **SHOW** drop-down list.

6. Select the **Check** icon to confirm.

7. Select the People Planner Azure Authentication Server application and then confirm.

8. Select the **Access People Planner Authentication Server** checkbox in the **Delegated Permissions** drop-down list to enable the People Planner Windows application to access the server application.

9. Click **SAVE**.

Set Up the MyPlan Application in Azure

You must register the MyPlan application with the Azure Active Directory Tenant to enable authentication using Azure.

You must also give MyPlan access to the People Planner Authentication Server. In addition, you must configure the MyPlan settings in the People Planner Web Admin Tool that are required so that MyPlan can communicate with Azure.

Register the MyPlan Application in Azure

To use Azure authentication, you must register the MyPlan application in Azure and configure it to authenticate against the People Planner Azure Authentication Server.

To register the MyPlan application and configure it to authenticate against the authentication server:

1. In the Active Director Tenant, navigate to the APPLICATIONS tab.
2. Click **ADD** in the bottom menu.
3. Select **Add an application my organization is developing**.
4. Enter a name for the application.
5. In the **Type** field, ensure that the **WEB APPLICATION AND/OR WEB API** radio button is selected.
6. In the **SIGN-ON URL** field, enter the URL of the login page.
7. In the **APP ID URI** field enter the domain of the Active Directory Tenant, followed by a string to represent the application.

   This value has the following format: https://<tenantdomain>.onmicrosoft.com/<applicationname>/

   For example:
   http://mmpeopleplanner.onmicrosoft.com/myplan

Configure Reply URLs

The MyPlan application in Azure must have a valid list of Reply/Redirect URLs. This is used to send authorization codes and logged-in user data to People Planner.

To configure reply/redirect URLs:

1. In theAzure MyPlan application, navigate to the CONFIGURE tab.
2. In the **REPLY URL** field, define links to redirect to AzureLogout.aspx and AzureLogin.aspx.

   For example, if you access MyPlan via `http://CompanyIIS/MyPlan/` or `http://CompanyIIS/MyPlan/Default.aspx`, the resulting entries are `http://CompanyIIS/MyPlan/AzureLogout.aspx` and `http://CompanyIIS/MyPlan/AzureLogin.aspx`.

3. To generate the **MyPlan Client Secret** key, select a duration from the drop-down and click **Save**.
Azure displays the created secret.

4. Copy and store the key value because you will need to paste it in the People Planner Web Admin Tool **MyPlan Client Secret** field during the Settings for the MyPlan Application steps.

5. Click **Save**.

Allow Access to the Authentication Server

You must configure access to allow MyPlan to authenticate against the server.

See Allow Access to the People Planner Azure Authentication Server for the steps to perform to set access privileges so that MyPlan can authenticate against the People Planner Azure Authentication Server.

Configure People Planner and MyPlan Using the Web Admin Tool

Use the steps in this section to configure the People Planner application and MyPlan in the Web Admin Tool.

Shared Settings for both the People Planner Application and MyPlan

Use these steps to configure settings for both the People Planner Application and MyPlan.

To configure the Admin settings to enable People Planner and MyPlan to authenticate using Azure:

1. Go to **Settings** » **System Settings** » **Azure Authentication**.

2. Enter values for the following in the Azure Authentication section:

   a) **Login Url**: This should always be https://login.windows.net/ unless Microsoft changes the login URL.

   b) **Server Resource Id**: This value should match the People Planner Authentication Server's App Id Uri. You can obtain this value by opening the application in Azure and navigating to the CONFIGURE tab.

   This value has the following format: https://<tenantdomain>.onmicrosoft.com/<applicationname>/

   For example: https://mmpeopleplanner.onmicrosoft.com/peopleplannerauthenticationserver/

   c) **Tenant Domain**: This should contain the domain name of the Azure Active Directory Tenant. You can obtain this value by opening the Azure Active Directory Tenant and navigating to the DOMAINS tab.

   For example: mmpeopleplanner.onmicrosoft.com

Settings for the People Planner Application

Use these steps to configure Azure authentication for the People Planner Application.

To configure the Admin settings to enable People Planner to authenticate using Azure:

1. Go to **Settings** » **System Settings** » **Azure Authentication**.

2. In the People Planner Application section, enter a value in the **People Planner Application Id** field.

   This should match the application ID of the People Planner application in Azure. You can obtain this value by opening the People Planner application in Azure and navigating to the CONFIGURE tab.

Settings for the MyPlan Application

Use these steps to configure Azure authentication for MyPlan.

To configure the Admin settings to enable MyPlan to authenticate using Azure:

1. Go to **Settings** » **System Settings** » **Azure Authentication**.

2. Enter values in the following fields in the MyPlan section:

   - **MyPlan Client Id**: This should match the ID of the People Planner MyPlan application in Azure.

     You can obtain this by opening the MyPlan application in Azure and navigating to the CONFIGURE tab.

     For example: cf5e974a-8b27-408f-bf04-ec8801395eb4

   - **MyPlan Client Secret**: You define the secret key on the CONFIGURE tab of the MyPlan application in Azure. See Set Up the MyPlan Application in Azure for more information.

   - **MyPlan OAuth2 Authorization Endpoint:** You can retrieve this value by opening the MyPlan application in Azure and then clicking VIEW ENDPOINTS in the bottom menu.

     This displays a list of the endpoints that are available to MyPlan. Copy the OAuth2 authorization endpoint into the Web Admin Tool.

OIDC Authentication

The standalone MyPlan Web Application can be configured to use the Maconomy SSO OAuth 2.0 OpenID Connect authentication protocol.

When MyPlan OIDC authentication is enabled, the user is redirected to authenticate with the identity provider specified in the Maconomy OIDC SSO setup.

OIDC Setup

Use these steps to set up OIDC authentication.

Prior to using MyPlan OIDC, ensure the following:

- Maconomy generic third-party SSO is set up in Maconomy using MConfig, and it is verified that it works.

  See the *Deltek Maconomy System Admin Guide* for more information.

- Maconomy RESTful Web Service is enabled and runs on the Maconomy system.

- People Planner is configured to integrate with Maconomy and import users from Maconomy.

  > **Note:** The users in Maconomy must have the Network Username and the Network Domain name set.

- Maconomy RESTful URL and the (SSI) Maconomy Secret Key are configured in the Web Admin Tool.

To use MyPlan OIDC, set up the following:

1. Add the MyPlan OIDC login page URI to the identity provider configuration as an allowed login redirect URI. The URI has the general form: <scheme>://<server>:<port>/MyPlan/OIDCLogin.aspx.

   For example:

   https://peopleplanner.mycompany.com/MyPlan/OIDCLogin.aspx

2. Enable the MyPlan OIDC authentication in People Planner settings using the Web Admin Tool.

3. Change the authentication setting for the IIS MyPlan web application from Windows Authentication to Anonymous Authentication.

   > **Note:** When using MyPlan OIDC with other People Planner Authentication schemes:
   >
   > - You are able to use MyPlan OIDC authentication with typical People Planner SSI or JWT token authentication.
   >
   > - You are unable to use MyPlan OIDC authentication with Azure AD. If Azure AD authentication is enabled for MyPlan, it takes precedence over the OIDC authentication protocol.

About Deltek

Better software means better projects. Deltek delivers software and information solutions that enable superior levels of project intelligence, management, and collaboration. Our industry-focused expertise makes your projects successful and helps you achieve performance that maximizes productivity and revenue.
www.deltek.com

Deltek