



# Integrations

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# OneConnect Administration

## Access OneConnect

This article explains how to access OneConnect - OnePlan's integration platform.

To access OneConnect, navigate to <https://my.oneconnect.ai/>. The login process will be the same as your OnePlan account.

## OneConnect Terminologies

This article provides a list of essential terminologies used within OneConnect.

Term	Definition	Notes
Tenant	A Tenant is a term used to describe an Office 365 Organization.	
Integration	Consists of two points of connection (Connectors), an integrator, and at least one strategy.	<i>When you're logged into OneConnect, the list you see are all of the Integrations deployed for your Tenant.</i>
Integrator	A web service that can be considered as middleware. Basically, the automated process to bring the two programs/ connections together.	<i>For instance, if a customer has a specific business requirement that is out of the standard use-case for an Integration, an Integrator could be created to accomplish the task.</i>

Term	Definition	Notes
Connector	A section within an integration that allows users to access the program by using a method of authentication. Additional settings and features may be available as well within the Additional Options dropdown.	E.g. the SharePoint Connector has Operations that can perform the following actions: Get List Items, Create List Items. Operations for Connectors will vary for each product, but typically there are common Operations so that any given Connector can be linked together for an Integration to perform work.
Connection	A Connection is an instance of a Connector. They contain Authentication information for a Connector in an Integration.	
Source Connection	A source connection is the location of where the data is being grabbed from. A source connection can change based on the strategy that is being used. OnePlanPublish strategy has the source connection of OnePlan. I.e., We are grabbing the values within OnePlan and bringing them into the other program the integration is connected to.	

## Integrations

Term	Definition	Notes
Destination Connection	A destination connection is the location of where the data is being brought into. OnePlanPublish strategy has the destination connection of any program other than OnePlan. I.e., We are grabbing the values from the source connection (OnePlan) and bringing the values into the other program (destination connection).	
Schedule	A Schedule defines when a Strategy should run. They can be configured to run hourly, daily, weekly, monthly. You can also specify specific times, and days of the week.	
Strategy	A strategy is a set of operations combined to complete an action. No action is taken on these sets of operations; however, they can be a useful tool to assist with debugging errors that may occur.	E.g. sync'ing ServiceNow incidents to a SharePoint list. Or sync'ing Visual Studio Team Services epics to Project Online projects.
Scheduled Strategy	A scheduled strategy is a strategy that will run either automatically on scheduled intervals or can be run by using the lightning bolt icon with the value of * (asterisk) within the Item ID field.	
Event	An event is a strategy that has been triggered either through OnePlan, or by using the lightning bolt icon with a value other than *. Most often the value entered should be related to a Plan ID from the Source connection.	
Operation	An Operation is defined in a Connector or Integrator, and is used to perform a specific task.	E.g. getting a list of projects from Project Online.

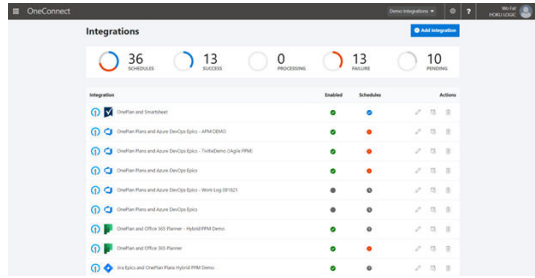
Term	Definition	Notes
Incremental Deltas	Some strategies have the capacity to bring in items that have been modified within a window of time, this can be seen in Azure DevOps, Project for the Web, Smartsheet, etc. The modified date must be available to be queried at the "plan level", if the plan does not have a modification date, then it will not be picked up by the strategy.	
Full Deltas	Some strategies do not have the capacity to query a modified date for their items due to the nature of the integration. This can be seen in both SQL, and Tabular Data integrations. Even if the strategy is marked to run only incrementally, the full strategy will be run.	
Filters	Filters for scheduled strategies and events are in different locations. If a filter for a scheduled strategy is set, and the strategy is then run as an event, the filters previously set will not apply in this case.	
Field Mappings	This is how information is going to transfer from one program to the other. Only a single mapping can occur at a time, this means I cannot map the same value to multiple locations in the other program or vice versa.	
Item Mappings	This is a collection of tables that will show where plans and tasks from one program are connected to within the other program. This can appear as a GUID, or as plain text.	



Term	Definition	Notes
Relay	Can be thought of as a software application that can securely expose other services within a clients' network to the public cloud. A relay should only be used for clients who have programs that are not accessible via the internet. If the clients' employees require a VPN to get into their company's program, there is a high probability that they will need a relay.	For more information, see <a href="#">What is a Relay?</a>
Legacy (Basic) Authentication	Legacy authentication is the process/ability to log into a site using only a username and password.	
Modern Authentication	Modern Authentication is the process/ability to log into a site using additional credentials beyond username and password. Most commonly seen as a Client ID & Client Secret, this provides an additional level of security and is also considered as more secure than traditional username and password combinations.	
Multi-Factor Authentication (MFA)	Multi-Factor Authentication is considered a multi-step login. If the username and password are correctly entered, then an extra step must be taken for the login to be processed successfully. Because of this, OneConnect does not support accounts that have MFA to be used within the integration.	

## Get Around the OneConnect Home Page

This article provides an overview of the OneConnect home page.


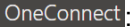
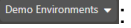





## Navigation Ribbon

The navigation ribbon is located at the top of the screen.



From left to right, the icons and menus are as follows:

- Office.com Waffle Icon** : Click on this waffle icon to go to Office.com.
- OneConnect Logo** : Click on the OneConnect logo to go to my.oneconnect.ai (return to home).
- OneConnect Group Menu** : Click on the drop-down to access a list of OneConnect groups that you have access to.
  - Add Group**: Click to create a new OneConnect group.
  - Other Groups**: Click to connect to a different, existing OneConnect group.
- Settings Icon** : Click to access the OneConnect settings menu.
  - Settings**: Click to update OneConnect settings.
  - Users**: Click to add and manage users in your OneConnect group.
  - Alerts**: Click to set up alerts/notifications.
  - Apis**: Click to manage the Api settings.
  - Relays**: Click to manage the Relay settings for your OneConnect environment.
- Help Icon** : Click to access OneConnect help content. When you click the Help icon, a drop-down menu will open:
  - Get Training**: Click to go to the [Integration](#) section of the support portal.
  - Get Support**: Click to go create a new Zendesk ticket or request.

6. **User Profile** : Click to access the User Profile drop-down menu.
  - **Log out**: Click to log out of the current account.
  - **Switch account**: Click to switch to a different account.

## Strategy Dashboard

Once logged into OneConnect, you will see your Strategy Dashboard. The Dashboard will give a synopsis of the number of scheduled strategies running in your OneConnect environment, which are then broken down into the state of their last scheduled run. The states available are Success, Processing, Failure, or Pending.






- **Success**: The number of strategies that have run successfully.
- **Processing**: The number of strategies that are currently running.
- **Failure**: The number of strategies that have failed.
- **Pending**: The number of strategies that are listed in the Schedules page but have yet to be run or are marked as disabled.





## Integration List

Beneath the Dashboard will be the integration list. This is every installed integration that has been set up in your environment/group. Each row indicates its own separate integration.



Each integration list item will have:

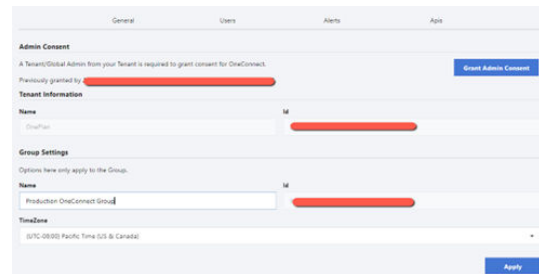
1. **Icon Pair** : This will list the Icons of the Programs that are involved within the integration.
2. **Integration Title** : The title of the integration. The title is normally generic; however, the title can be customized while inside of the integration.
3. **Enabled Status** : This indicates if the integration is enabled or disabled.

4. **Schedule Status** : This indicates if the strategies have run successfully or not.
5. **Edit Icon** : Click to view and edit the integration properties. You can also edit the filters, schedules, mappings, and more.
6. **Schedule Icon** : Click to view and edit the integration properties, opened to the Schedules page.
7. **Delete Icon** : Click to delete the integration from OneConnect.

## OneConnect Settings

This article explains the OneConnect setting options.

### General Settings

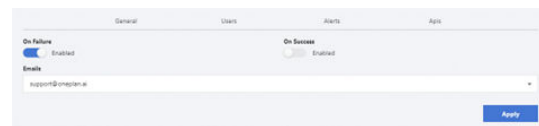


1. Here is where the Microsoft Global Admin can Grant Admin Consent for the organization and their users for the use of OneConnect (specific integrations might require further consent).
2. The name of the OneConnect group can be changed.
3. The time zone can be applied here.

### Users Settings

Within this tab, the list of individual users/accounts that have been granted access to the individual OneConnect group will show here. Any individual who has Administrator access can add users, view access requests, change the role of each user, and remove access to the group.

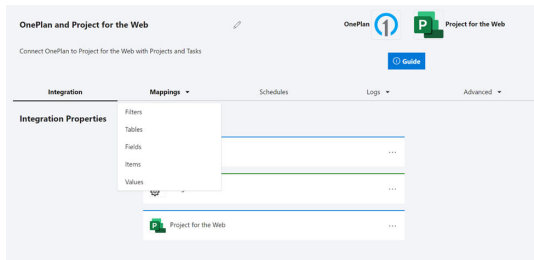
### Alerts Settings



If specific users wish to be notified on failed strategies, add the email, and click on the On Failure toggle so the toggle shows as blue, then click Apply. See [Enable Job Failure Email Alerts \[18\]](#) for more information.

## Manage Integration Mapping Settings

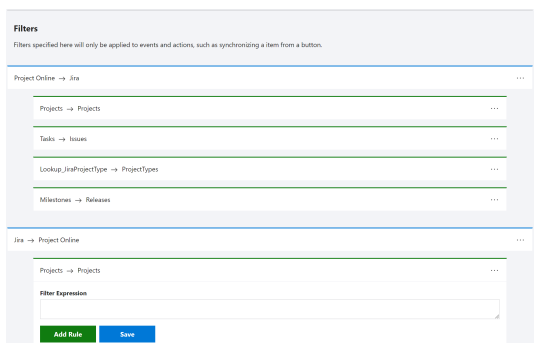
Anything that has to do with syncing information between the two programs in question will be found here.



### Filters (for events)

The filters page located in the Mappings dropdown is specifically only for events. Events are triggered either through the Connected Systems icon within OnePlan, or by inputting a plan id when running a strategy.

When filtering on a field, that field **MUST** be mapped in the Field Mappings section.



### Tables

This section will show the tables that are mapped between the two programs. This is done in the backend and cannot be modified.

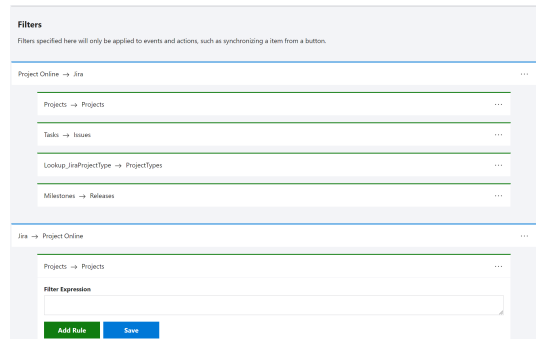
Table Mappings		
ID	Project for the Web	Jira
1	Projects	Projects
2	Tasks	Issues
3	Lookup_inaProjectType	ProjectTypes
4	Milestones	Releases

### Fields

Field Mapping is where you specify which values in one program go to the other program, and if that data only flows in one direction, or bi-directionally between the two programs. Field mappings are usually broken down between their respective tables (this can be resources, plan level items, backlog level items, etc.).

Each section can have their own fields to be mapped. It is currently not possible to map one value to multiple locations on the same table.

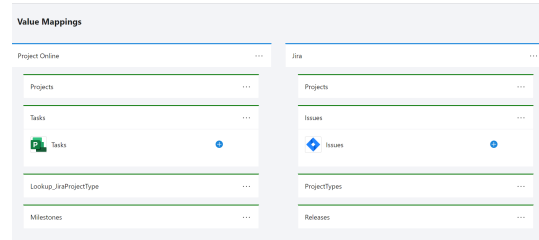
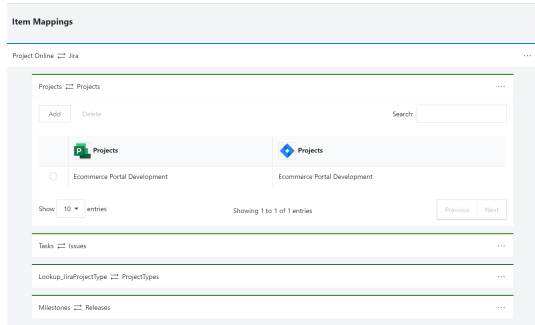
Each column represents a single program within the integration. The dropdown options will give the program field name that is desired to map to the other program field name. For the values to transfer correctly, the values need to match the other programs options. To control the direction/flow of data, click on the arrows in between the fields until the desired direction has appeared.



### Items

To see which plans from program one are connected to program two, this is where you can see the connection. Depending on the integration, there is the ability to connect items manually between the two programs, or to delete a mapping from no longer being synchronized. This can be at both the Plan level and the Backlog level.

The number in each column represents the Plan Id (or equivalent) for that column's program.



## Values

Most programs have different names for similar values (Not Started vs. New for example). To ensure that the value will come over from both programs without errors, value mapping is a go to spot to change New in program one to Not Started in program two (and vice versa) so when syncing the values back and forth, there will be no issues.



### NOTE

Values that are being edited/modified need to be mapped in the Field Mappings section.

For the value mapping, there will be two columns (each column represents a program in the integration), and within each column there are their own set of sections (these sections imitate the Field Mappings setup).

Take note of which field you wish to modify and navigate to the appropriate section and click on the blue plus button to create a new value mapping. A new window will appear.

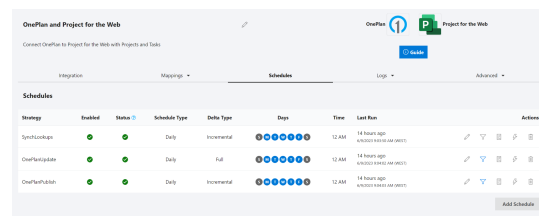
The Field dropdown will reflect the column/program options.

The Source Value text field will be manually entered. Please note that these values will be case sensitive.

The Destination Value text field will be what the second program receives as the new value. This value is also case sensitive and must be a valid option for the second program.

## Manage Integration Schedules Settings

This is where you can set any available strategy for the integration to run on a schedule. Some integrations will pre-populate the most common schedules in use, while others do not. Please navigate to the information page of your integration to find out which options are available to you for.



## Edit the Schedule

To edit a strategy, click on the Pencil Icon to open the Edit Strategy window. From here you can:

- **Enable or Disable** a strategy from being scheduled.
- **Set the Schedule Type:** Hourly, Daily, Monthly, or None.
- **Days of Week** the strategy will be executed.
- The **Times of Day** the strategy will be scheduled to begin.
- The **Time Zone** the strategy would trigger at.
- The **Delta Type:** Full sync, or Incremental sync.
- **Deltas Range** will determine how an incremental sync will grab data.

## Apply Filters to the Schedule

Filters will limit which plans will be processed and brought over to the other program. If a filter is to be used, the field being filtered MUST be mapped in the Field Mappings section.

## Look at Logs for the Schedule

One way to see the logs of the scheduled strategies is to click on the log icon.

## Execute a Strategy At-Will

If you wish to run the strategy at-will, click on the lightning icon, and then click execute. If desired, the strategy can be run against a single item (also known as an event). Click on the lightning icon, and within the text box, add the Item Id, and then click execute. Please note that events do not follow the same filters as a scheduled strategy.

## Remove the Strategy from the Schedules List

To remove the strategy from the Schedules list, click on the Trash Icon. This will not delete the strategy from the integration. To re-add the strategy to the Schedules list, click on Add Schedule.

## Add Another Strategy to the Schedules List

Click on Add Schedule, to choose what strategy is desired to add to the list. From here the strategy settings can be set and click **Save**.

## Review Your Logs

You can see the logs of the scheduled strategies is to click on the log icon.

## Review Integration Logs

This article explains how to view the event logs and schedule logs for an integration in OneConnect.

The Logs tab in the OneConnect Admin Center is where you can find out more information on your strategies, especially if a strategy has failed. When a strategy fails, if notifications are set up for the clients OneConnect group, the people on the notification list will be emailed that one of their strategies failed.

## Strategy Status Meanings

When reviewing integration logs, there are three statuses captured for when a strategy runs: Failure, Success with Exceptions, and Success. The following table details what each of these statuses means.

Status Value	Description
Failure	No items have been processed. Strategy failed before processing data. Please review logs for additional insights into the failure.
Success with Exceptions	Some but not all items were successfully processed. The logs include the list of items that failed to process. If the same item has failed multiple times in a row, it is encouraged to process that item as an event to gain further insights into why the plan item has failed.
Success	All items were processed without failure. Complete success.

## Statistics Logs

This page gives the number of times the jobs (strategies) have run for the entire lifecycle of the integration. The duration of the jobs. the average runtime. The number of items, tables and rows that have been processed. The overall % of successes vs. the overall % of failures.

## Event Logs

This page shows the logs of all the strategies that have run on a specific plan(s). Often, this is done through the Connected Systems icons within OnePlan or when a specific plan id is used when using the Lightning Bolt Icon within the Schedules tab. Logs are kept for 3 days. When an event fails, no email notification is sent out.

Created	Strategy	State	Status	% Complete
6 days ago (6/6/2023 11:44:16 PM (MST))	OnePlanPublish	Complete	Success	100
6 days ago (6/6/2023 11:43:19 PM (MST))	OnePlanPublish	Complete	Success	100
6 days ago (6/6/2023 11:38:09 PM (MST))	OnePlanPublish	Complete	Success	100
6 days ago (6/6/2023 11:34:42 PM (MST))	OnePlanPublish	Complete	Success	100

## Schedule Logs

This page will show all the scheduled strategies that have run over the past 3 days. Scheduled logs occur when the strategy runs on the intended schedule, and if using the Lightning Bolt icon in Schedules tab (and no plan id is entered in the text window).

**Schedules**  
All transactions that are tied to a schedule.

**Queued, In Progress, or Retrying**

Show: 10 entries

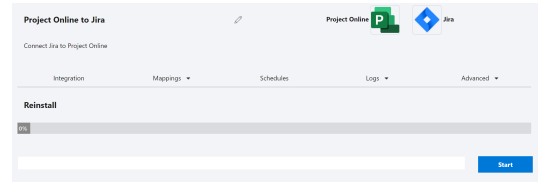
No data available in table.

Showing 0 to 0 of 0 entries

**Complete**

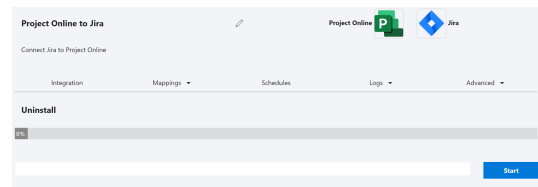
Show: 10 entries

Created	Strategy	State	Status	% Complete
23 minutes ago 6/13/2022 2:48:19 AM (MEST)	OnePlanLookup	Complete	Success	100
27 minutes ago 6/13/2022 2:44:57 AM (MEST)	OnePlanLookup	Complete	Failure	100
48 hours ago 6/13/2022 2:43:33 AM (MEST)	SyncLookup	Complete	Success	100
2 hours ago 6/13/2022 1:02:00 AM (MEST)	SyncLookup	Complete	Success	100
3 hours ago 6/13/2022 1:02:49 AM (MEST)	SyncLookup	Complete	Success	100



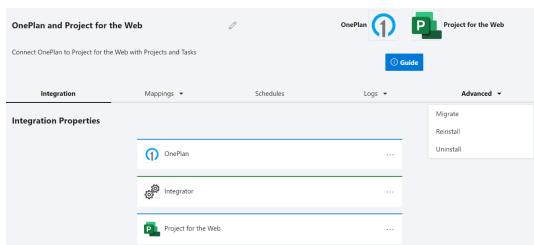
## Uninstall

If you wish to uninstall the integration from the OnePlan group, this is where you can start the process. This is a self-automated process, all that is needed is to click the Start button.



## Manage Integration Advanced Settings

This article explains the advanced integration settings in OneConnect.



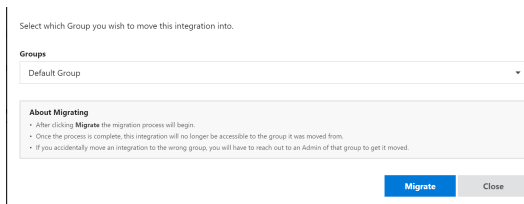
## Enable Job Failure Email Alerts

This article explains how to enable alerts in OneConnect to send a message when a job runs into a failure.

## Migrate


If a client wishes to move an integration from one OneConnect group to another, they can change the OneConnect group from the Groups dropdown, and then select Migrate.

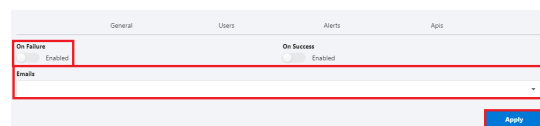
The list of available OneConnect groups is dependent on if they are added to the OneConnect group.



### NOTE

You must have Admin privileges to enable this feature.

1. In OneConnect, select the **Settings** icon  > **Alerts**. The Alerts settings will open.
2. In the **Emails** field, enter the email address of all users who should receive integration Failure alerts.
3. Toggle the **On Failure** switch to **Enabled**.
4. Click **Apply**.



## Reinstall

Sometimes errors occur during setup, and a reinstall is necessary. No further steps are needed besides clicking the Start button. The process is self-automated from there.



## What is a Relay?

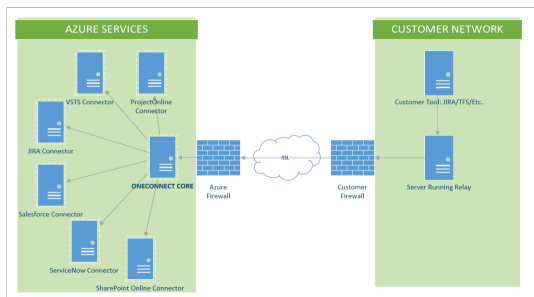
### About

The Azure Relay service facilitates hybrid applications by enabling you to securely expose services that reside within a corporate enterprise network to the public cloud, without having to open a firewall connection, or require intrusive changes to a corporate network infrastructure. Relay supports a variety of different transport protocols and web services standards.

The relay service supports traditional one-way, request/response, and peer-to-peer traffic. It also supports event distribution at internet-scope to enable publish/subscribe scenarios and bi-directional socket communication for increased point-to-point efficiency.

In the relayed data transfer pattern, an on-premises service connects to the relay service through an outbound port and creates a bi-directional socket for communication tied to a particular rendezvous address. The client can then communicate with the on-premises service by sending traffic to the relay service targeting the rendezvous address. The relay service then "relays" data to the on-premises service through a bi-directional socket dedicated to each client. The client does not need a direct connection to the on-premises service, it is not required to know where the service resides, and the on-premises service does not need any inbound ports open on the firewall.

For more information, [click here](#).



### Requirements

A server will need to be setup inside your network (or possibly in your DMZ) that will host the WCF relay application. The minimum specs for this server are:

- Windows Server 2016 (Virtual or Physical)
- .net 4.6.1
- 2 cores, 8gb ram
- 32 gb hard drive

Outbound to the following ports: 5671, 9350, 9351, 9352 (TCP)

IP addresses will be provided before the installation.

Using an internet proxy is acceptable.

## Relay Installation

This article explains how to install OneConnect relays. See [What is a Relay? \[19\]](#) for more information on relays.

### Relay Download

1. Log into OneConnect.
2. Click on the Gear icon. This will expand the available settings options.
3. Select **Relays**. A page with all the available relays is made available.
4. Click on the toggle to include the integration programs that will be used.



#### NOTE

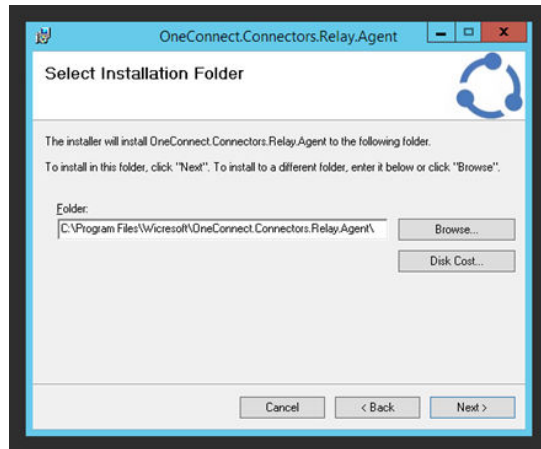
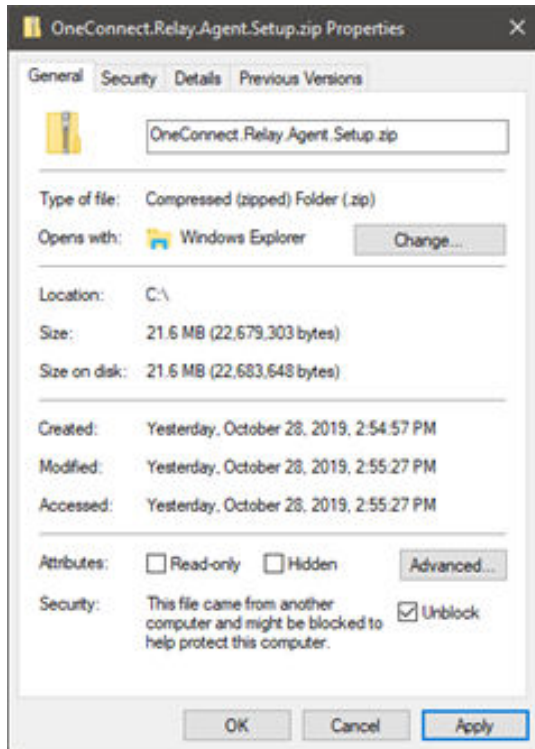
If the integration includes OnePlan, there is usually no need to include the OnePlan side. However, please feel free to contact your support team to find out if the OnePlan side to the relay is needed.

5. Click **Download**.

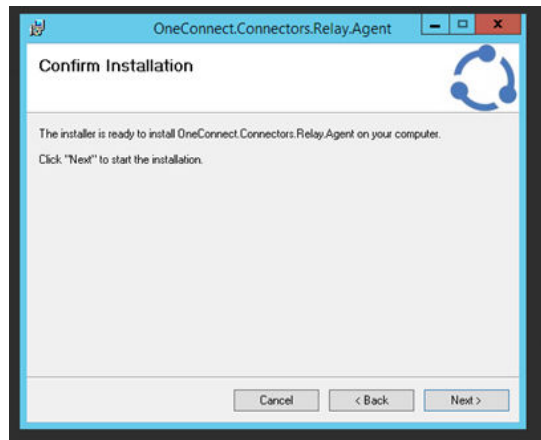
### Download Notice

The Relay Agent installer that is generated may need to be "unblocked" after downloading to avoid security warnings.

To "unlock" a file, right-click it in Windows Explorer, choose Properties from the context menu, check the **Unblock** checkbox in the lower right-hand corner of the resulting dialog, and click **OK** or **Apply**.

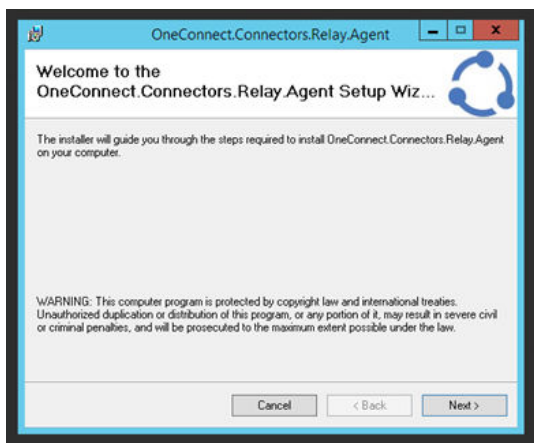


7. Click **Next**.



## Relay Installation

1. Extract contents of **OneConnect.Connectors.Relay.Setup\_{version & date}.zip**.
2. Open folder of extracted zip.
3. Run **OneConnect.Connectors.Relay.Setup.msi**.
4. Click **Next**.



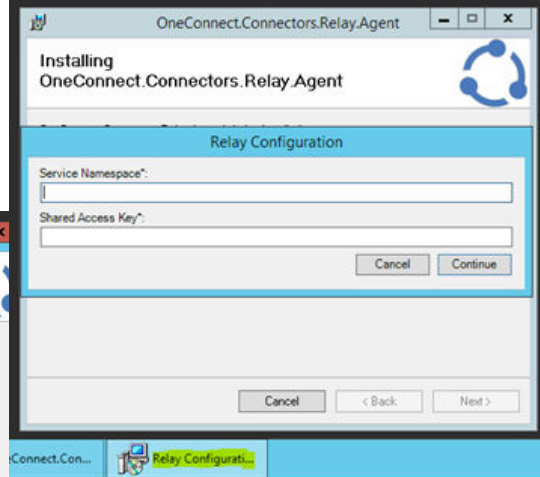
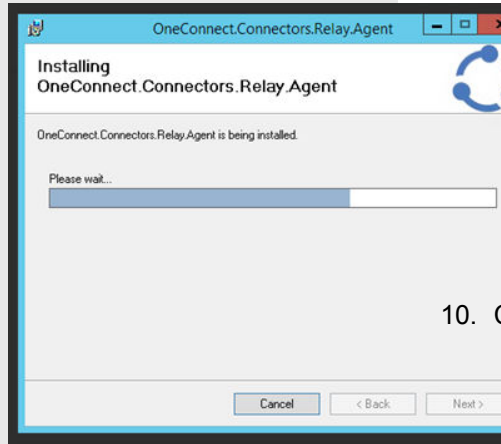
5. (Optional) Change installation folder.
6. Click **Next**.





**NOTE**

During the installation process a prompt will display, shown in the screenshot.

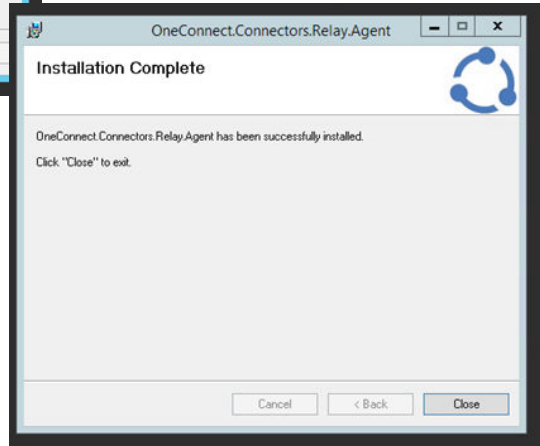


10. Click **Close**.



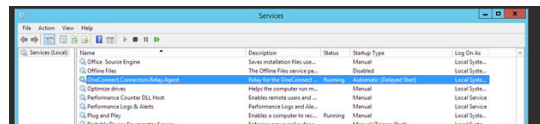
**NOTE**

Sometimes the 'Relay Configuration' modal will be displayed behind but can be accessed in the Task bar.



8. Fill in the 'Relay Configuration' prompt's
  - **Service Namespace:** \*-oneconnect-relay (\*provided by OnePlan)
  - **Shared Access Key:**\* (\*provided by OnePlan)
9. Click **Continue**.

11. You can confirm the Relay Agent is running by opening **Services.msc** as shown in the screenshot.



**Installation Notice**

**Initial Installation Log:** During installation a log file is generated and can be found in the same location as the installer.

**Logging Information:** Other logging information, such as relay startup or relay errors can be found in the installation directory under **\Logs**.

## Uninstall and Update a Relay

Only a single relay can be installed in a server at a single time. Because of this, uninstalling a relay will be necessary to update to a newer version of the relay.

1. Take a Backup of the Relay Configuration Files. Take a backup of the OneConnect.Connectors.Relay.Agent.exe.config file from the current relay folder. The current relay folder will be where the relay was installed from the initial installation steps.
2. Uninstall the Existing Relay. Using the computer's Add/Remove Programs tool, locate OneConnect Relay Agent and uninstall the program.
3. Reinstall the Relay. From here, follow the [Relay Installation \[19\]](#) instructions.
4. Update Relay Configuration Files. Once the new relay has been installed, navigate to the relay folder, and compare the OneConnect.Connectors.Relay.Agent.exe.config files from the old relay configuration files. For pathing values or service account information, overwrite these values from the old configuration to the new one.

This is to ensure that any environment-specific values are not overwritten with the default configuration values from the newly installed relay. The values in question will look like pathing values, especially anything that is referring to <appSettings> nodes. An example is provided below:

```
<add key="EnvironmentSpecificSetting_PathT
```

```
<add key="EnvironmentSpecificSetting_Shoul
```

```
<add key="EnvironmentSpecificSetting_BaseUrl value="https://somedomain.com/" />
```



### NOTE

Knowing exactly what values should be set can be confusing if you do not know what you are looking for, we suggest reaching out to Support to go over the values in question to verify what should be changed or not.

5. Save any changes made, and start the new relay.

## OnePlan Integration settings

This article explains the Integration settings in the Admin pages of OnePlan.

Go to the Admin pages, select Integration in the navigation. These settings are available when the Advanced Settings are enabled.

### Authentication Keys

Any authentication keys that have been added, such as for reporting or integration will show on this page. You can't see the actual keys themselves, just the name.

Click Delete to remove a key if needed.

Authentication Keys +	
App Name	Key
Reporting	*****

To allow integration to this tenant, please make sure you are logged in with a tenant admin and click [here](#)

To create a new authentication key:

1. Click **Add Key** . The **Add Key** form will open.
2. Enter a name for the new key. Then click **ADD** to create.

#### Add Key

After the key is created, be sure to copy and store in safe location. You will not be able to recover the key

Key Name:  .csv" />

3. The new authentication key will be visible in the Authentication Keys list. Copy and save the key in a secure location. The key will become encrypted when you reload the Admin pages.

Authentication Keys +	
App Name	Key
Reporting	*****
New Key 1	d7gn2pXi2UipYGLDHj4XTKqO2QtFzCD

To allow integration to this tenant, please make sure you are logged in with a tenant admin and click [here](#)

## Events

Any events that have been added will show. If an integration has already been built/configured, you may add an additional event.

Target	Type	Url	Strategy	IntegrationId
Work Plan	After Save	https://oneplan.azurewebsites.net/api/teams/event	Teams Event	No Integration
Resources	After Save	https://oneplan.azurewebsites.net/api/teams/res...	Teams Resource Event	No Integration

To create a new event:

1. Click **Add Event** . The **Add Event** form will open.
2. Complete the **Add Event** form. Click **ADD** to create the new event.
  - **Target:** The target is where the event going to be installed at. Options include **WorkPlan**, **Process Flow**, **Resources**, and **Status Reports**.
  - **Type:** Type is when the event will run. Options include **Before Save** and **After Save**.
  - **Triggers:** Triggers determine when the event will kick it off. Options include **Add**, **Update**, **Delete**, **Submit**, and **Approve/Reject**
  - **Url:** URL is the URL the event will go to when it runs. Enter the URL.
  - **Strategy:** If the event is for an integration and runs a OneConnect strategy or another item name, enter the strategy name.
  - **IntegrationId:** If the event is for an integration using OneConnect, enter the ID of the integration.

Add Event

Target:

Type:

Triggers:

Url:

Strategy:

IntegrationId:

## Integrations

All integrations set up in your environment are listed in the Integrations section.

Click **Delete** to remove an integration if needed.

Integrations	
System	List
Microsoft Teams	Plan

To add a new integration into your environment, click **Add Integration** . You will be redirected to our integration platform, OneConnect.

## Reporting

Add the url to your odata feed to enable powerful reporting in OnePlan.

Reporting Info

<https://oneplanqagraph.azurewebsites.net/odata/c65a995d-7140-40bf-b31a-2903a00e>

## Integrations troubleshooting

### Is it possible to utilize filters on the SynchLookups strategy? (OnePlans Plans and SharePoint List Integration)

At this point in time, filters will not work on the SynchLookups strategy.

The **SynchLookups** strategy should only be used when bringing in values from a single choice list from SharePoint into a blank (empty) OnePlan Choice field that is mapped in both the (**SPLists - Plans**) and in the (**ListForLookups - LookupTable**). Running this strategy will populate the blank OnePlan choice field with the options from the SharePoint side.

Filtering should be used on the **SharePointToOnePlan** strategy.

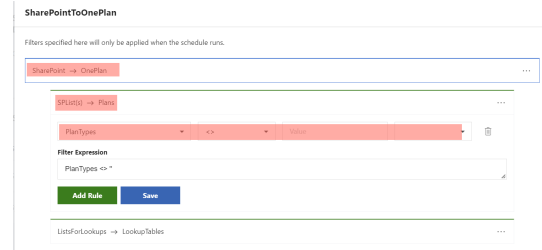
1. Click on the filter icon associated with the **SharePointToOnePlan** strategy.
2. Click on the **SPList(s) - Plans** to expand the filtering section.
3. Click the **Add Rule** button, this will create a new line with four fields where you can add your new filter.

Strategy	Enabled	Status	Type	Days	Time	Last Run	Actions
SharePointToOnePlan	Yes	Green	Daily	Mon-Fri	12 AM	3 hours ago 8/25/2022 10:03 AM PST	[Filter] [Close] [Refresh] [Delete]
SynchLookups	Yes	Green	Daily	Mon-Fri	12 AM	40 hours ago 8/25/2022 11:04 PM PST	[Filter] [Close] [Refresh] [Delete]

To filter based on a null value (blank or with no choice selected for the list item in SharePoint) in the first field (a drop-down):

1. Select the SharePoint Choice field name.
2. In the second field, select the < > from the drop-down.
3. In the third field (labeled **Value**), leave it blank.
4. Click the **Save**. This will populate the **Filter Expression** field.
5. Click the **Close** button at the bottom of the **Filters** window. The next time the schedule

runs, the filter will activate and only the list items.



### Why is the the “Include in app” toggle in Power BI greyed out on all my Power BI workspaces for all service accounts?

#### Issue

The “Include in app” toggle in Power BI is greyed out on all Power BI workspaces for all service accounts.

#### Cause

Microsoft released an update to Power BI that controls inclusion in Apps from the main screen.

#### Solution

1. Click on **Update App** to get into the **Update App** configuration screen.
2. Click on step **"2. Content"** and then **"Add content"** and add the new report to the Content list below.
3. Then click on step **"3. Audience"** and make sure the newly added report is not hidden (it seems to be marked as hidden by default).
4. Then you publish the app and the new report will now appear in the App.

## Why is the “Include in app” toggle in Power BI is greyed out?

### Issue

The “Include in app” toggle in Power BI is greyed out.

### Cause

There was an update to Power BI that was deployed 08/24/2022 and you can no longer control inclusion in Apps from the main screen.

### Solution

The column is still there so you can see if a report is included in the app, but you can't change it there anymore. The new steps are this:

1. Click on **Update App**, to get into the **Update App** configuration screen.
2. Click on step **2. Content** and then **Add content**. Add the new report to the **Content** list below.
3. Click on step **3. Audience** and make sure the newly added report is not hidden (it seems to be marked as hidden by default).
4. Publish the app. The new report will now appear in the app.

## Why are my Power BI reports not refreshing?

Problem	Cause	Solution
---------	-------	----------

Power BI Reports not refreshing.  (Power BI Reports Processing Error: (503) Server Unavailable)	Failure to connect to the server due to expired credentials.	Update the data source credentials in Power BI.  <ol style="list-style-type: none"> <li>1. Log into Power BI.</li> <li>2. Go to the OnePlan Workspace. Locate the affected data set (orange icon).</li> <li>3. Select the <b>More Options</b> icon (vertical dots) &gt; <b>Settings</b>.</li> <li>4. Expand the <b>Data source credentials</b> heading.</li> <li>5. Select <b>Edit Credentials</b> for Cds and OData. Update the credentials.</li> </ol>
---	--	--

## Why is Committed Effort not syncing from the OnePlan Resource Plan to the Committed Effort field in the project General tab? (Power Apps)

Problem	Cause	Solution
Committed Effort is not syncing from the OnePlan Resource Plan to the Committed Effort field in the project General tab.	<b>Committed Effort</b> and <b>Percent Complete</b> fields are using incorrect data types (whole numbers).	Create new fields that use the correct data type (decimal).  <ol style="list-style-type: none"> <li>1. Create new <b>Percent Complete</b> and <b>Committed Effort</b> fields as decimals.</li> <li>2. Add the new fields to the Form.</li> <li>3. Run the <b>OnePlan to Power Apps</b> sync operation to refresh the data.</li> </ol>

## Common Integration Errors

This article lists and describes common integration errors that may occur. These errors are general and can happen with any integration.

**(Protocol) The communication object, System.ServiceModel.Channels.ServiceChannel, cannot be used for communication because it is in the Faulted state.**

This error indicates an issue with the Azure Relay.

There are relay credentials entered within the Relay Options section of the configuration of one of the Integration Connectors and that relay is turned off or not working properly.

If a relay was entered for debugging purposes, remove the credentials and click Save. Re-run the strategy.

If a relay is required for on-premises integrations, then check the server hosting the relay and make sure the relay is running and there are no error messages logged.

**Strategy '{Strategy Name}' was not found.**

The integration does not have a strategy with that name.

Remove or update the schedule and pick a different strategy.

**Can't create plan: Please make sure 'Name' field is mapped or is set in the direction of OnePlan!**

This is an error that relates to creating plans in OnePlan. The OnePlan Name field must be mapped in order to create plans in OnePlan.

Update the field mapping and map the OnePlan Name field.

**Error: Column 'System.{Field Name}' does not belong to table {Table Name}.**

There is a field name used in a filter that is not mapped. Every field used in filters must be mapped.

Update the field mapping and map the missing field(s).

**Error: The underlying connection was closed: A connection that was expected to be kept alive was closed by the server.**

This error indicates an API timeout issue. A call was made to an API and that API did not return the call within a set timeframe. In most cases, this issue is related to a single item that is being processed. If the strategy is scheduled to run again, then the item will be processed again as it is in an error state due to the timeout. If the same item fails many times, then it is possible that the specific item has a data issue. In that case review the data for that item.

**Detected a long running operation, review may be needed.**

This error indicates an API timeout issue. A call was made to an API and that API did not return the call within a set timeframe. In most cases, this issue is related to a single item that is being processed. If the strategy is scheduled to run again, then the item will be processed again as it is in an error state due to the timeout. If the same item fails many times, then it is possible that the specific item has a data issue. In that case review the data for that item.

**Error: The operation has timed out**

This error indicates an API timeout issue. A call was made to an API and that API did not return the call within a set timeframe. In most cases, this issue is related to a single item that is being processed. If the strategy is scheduled to run again, then the item will be processed again as it is in an error state due to the timeout. If the same item fails many times, then it is possible that the specific item has a data issue. In that case review the data for that item.

**The remote server returned an error: (502) Bad Gateway**

This error indicates an API timeout issue. A call was made to an API and that API did not return the call within a set timeframe. In most cases, this issue is related to a single item that is being processed. If the strategy is scheduled to run again, then the item will be processed again as it is in an error state due to the timeout. If the same item fails many times, then it is possible that the specific item has a data issue. In that case review the data for that item.

**The remote server returned an error: (403) Forbidden. Status: ProtocolError  
QueryUrl: https://oneplanqagraph.azurewebsites.net/api/config**

Authentication Key to the OnePlan Group was deleted. Generate a new OnePlan Authentication Key and save those credentials in the OnePlan Connector.

This error can also indicate an API timeout issue. A call was made to an API and that API did not return the call within a set timeframe. In most cases, this issue is related to a single item that is being processed. If the strategy is scheduled to run again, then the item will be processed again as it is in an error state due to the timeout. If the same item fails many times, then it is possible that the specific item has a data issue. In that case review the data for that item.

**Server Error in '/' Application: Object reference not set to an instance of an object.**

This error indicates that there may be a configuration issue in OnePlan. Verify that the Microsoft Teams App is installed in OnePlan.

## Common Microsoft Product Integration Errors

This article lists and describes common integration errors that may occur with Microsoft products.

Integrations that connect to a Microsoft Product including by not limited to: M365 Planner, Power Apps, Tabular Data, Project Online, Project for the Web, SharePoint Online.

**The sign-in name or password does not match one in the Microsoft account system.**

This error occurs when using an account that has Multi Factor Authentication enabled or if the username/password combination is incorrect.

Please make sure that a service account configured in OneConnect does not have Multi Factor Authentication (MFA) enabled. Please also verify that the username and password are correct.

## Common Azure DevOps Integration Errors

This article lists and describes common errors that may occur with the Azure DevOps integrations.

**VSTS Connection: Error at (2-6) Response status code does not indicate success: 401 (Unauthorized). at System.Net.Http.HttpResponseMessage.EnsureSuccessStatusCode() at ProjectConnect.Connectors.VSTS.TfsClient.EstConnection() in D:\a\1\s\ProjectConnect.Connectors.VSTS\TfsClient.cs:line 103**

This error indicates that the Azure DevOps Personal Access Token expired or is revoked.

Please make sure that you are using an access token that is valid.

For more information, please see [Use personal access tokens](#) from Microsoft.

### TF50316

Azure DevOps has several naming conventions. This error indicates that those naming conventions are violated.

For more information, please see [Naming restrictions and conventions](#) from Microsoft.

### VS403074

The Work Item Type does not exist in the Inherited Process template.

For more information, please see [Add and manage work item types](#) from Microsoft.

**Error: TF401326: Invalid field status 'InvalidType' for field 'Microsoft.VSTS.Common.{Field Name}'.**

The value used in OnePlan does not match the available values in Azure DevOps.



OnePlan should either have the value updated, or there needs to be Value Mapping configured in OneConnect. (to map between the list of values in OnePlan and the list of values in Azure DevOps).

**TF51011: The specified iteration path does not exist. The error is caused by «'{Iteration Path Value}'».**

The iteration path in Azure DevOps no longer exists, or it is in the middle of the iteration path list (I.E., Path Two was chosen within: Path One/Path Two/Path Three).

## Common Project Online Integration Errors

This article lists and describes common errors that may occur with the Project Online integration.

**System.Web.Services.Protocols.SoapException [GeneralNotLicensed] (20024): ProjectServerError(s) LastError=GeneralNotLicensed Instructions: Pass this into PSClientError constructor to access all error information**

The service account configured in OneConnect to connect to Project Online does not have a license for Project Online. Please make sure you assign at least a Plan 3 type of license to the account.

**[CheckoutCheck]: {OnePlan ID}: Currently checked out by {User Display Name} ({User Email}), skipping.**

The plan (named in the error) is currently checked out by the user in OnePlan. That person or someone else must check the plan back in for the item to sync data back to OnePlan or be updated with the values within OnePlan.

## Common Tabular Data and SharePoint Integration Errors

This article lists and describes common errors that may occur with Tabular Data or SharePoint integrations.

**Error: Exception while retrieving DataTable for {File Name}: The file type for is not supported.**

The file specified in the Tabular Data configuration cannot be accessed or the or the file type was not of CSV format. Please verify that the file is accessible (use a browser with the path). Please note that only csv files are supported.

**Exception while retrieving DataTable for {FileName}: List '{Folder Path Value}' does not exist at site with URL '{SharePoint Site URL}'.**

The folder path being used is more than one level deep. The file must reside within a folder that is one level deep (I.E., Documents). The file cannot be in / Documents/Folder One or deeper.

## Common M365 Planner Integration Errors

This article lists and describes common errors that may occur with the MS365 Planner integration.

**Cannot perform runtime binding on a null reference.**

The M365 Planner strategy is scheduled to run. This type of integration cannot be scheduled. These strategies should be removed from the Schedules list and only be triggered as an event within the Connected Systems button in OnePlan.

## Common Jira Integration Errors

This article lists and describes common errors that may occur with the Jira integrations (Epics or Projects)

### Jira Epics

**[UpsertEpic]: Make sure 'Project Name (Epic)' field is mapped!**

The OnePlan plan does not have a value in the Jira Project Name field populated.



## Jira Projects

### **[UpsertProject]: Jira Project Type value not found!**

The OnePlan plan does not have a value in the Jira Project Type field populated.

## **Common Dynamics and Power Apps Integration Errors**

This article lists and describes common errors that may occur with Dynamics and Power Apps integrations.

### **Error: Invalid URI: The format of the URI could not be determined.**

This is caused by mapping a large number of fields in Field Mappings. There is a maximum number of characters that can be processed, so if there are a lot of field mappings with long names, this error can trigger. Please review the mapped fields, use shorter names or remove some of the field mappings.

## **Common OneConnect Errors**

This article provides access to detailed descriptions of common errors that may occur with our various OneConnect integrations.

[Common Integration Errors \[25\]](#)

[Common Microsoft Product Integration Errors \[27\]](#)

[Common Azure DevOps Integration Errors \[27\]](#)

[Common Project Online Integration Errors \[28\]](#)

[Common Tabular Data and SharePoint Integration Errors \[28\]](#)

[Common M365 Planner Integration Errors \[28\]](#)

[Common Jira Integration Errors \[28\]](#)

[Common Dynamics and Power Apps Integration Errors \[29\]](#)

# Teams Integration

## Auto-Create Connected Teams from OnePlan

This article explains how to auto-create a new Team with each new OnePlan project.

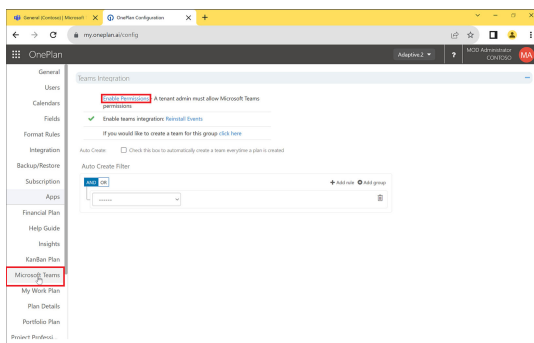
Using this method allows you to create:

- A plan-level OnePlan tab within a new team, which only shows OnePlan data relevant to your plan. See [Create a Plan-Level Team from OnePlan \[30\]](#).
- A group-level OnePlan tab within a new team, which gives you full access to OnePlan from Teams. See [Create a Group-Level Team from OnePlan \[31\]](#).

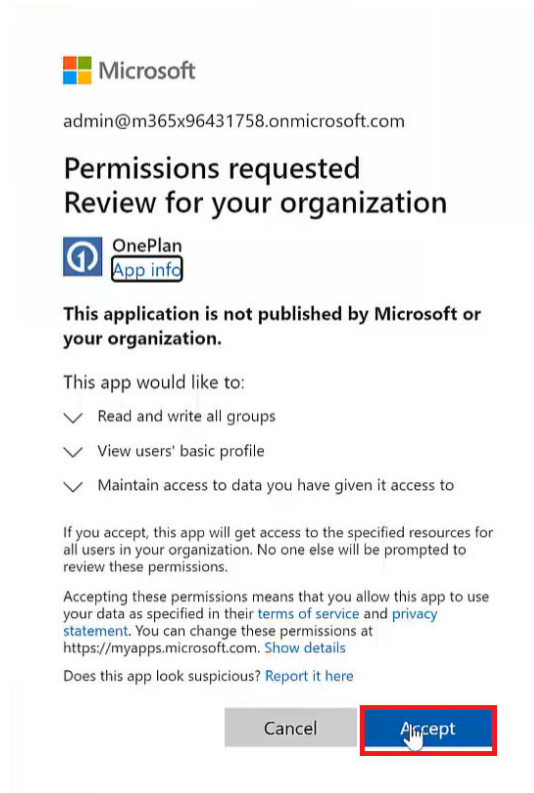
Be sure that your OnePlan group has been set up and that you have admin access before beginning this process.

## Enable OnePlan for Teams

1. Go to the **Admin pages > Microsoft Teams**.
2. Click **Enable Permissions**.

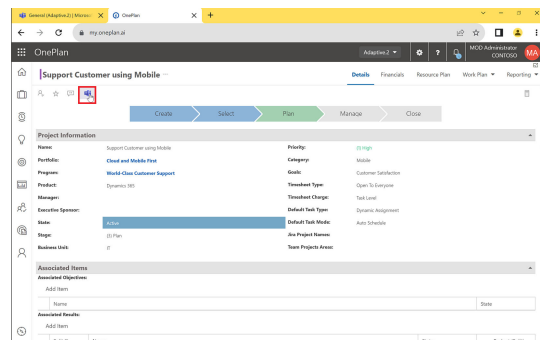


3. Click **Accept** to enable OnePlan for Teams.

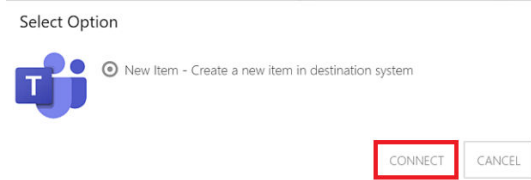


## Create a Plan-Level Team from OnePlan

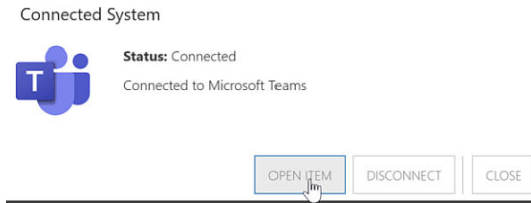
1. Within the **Details** tab of your plan, click the **Teams** icon. The **Select Option** pop up will open.



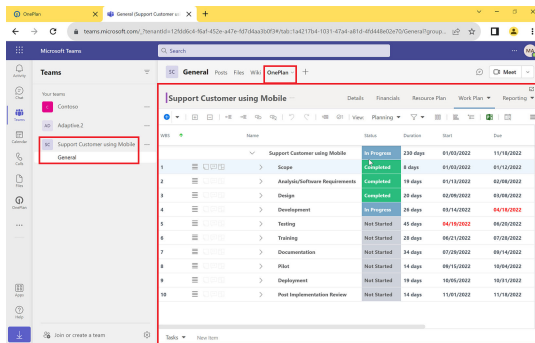
2. Click **Connect** to connect your OnePlan plan to Teams. Once the integration is done setting up, the **Connected System** pop up will open.



3. Click **Open Item** to go to the new connected Teams Team.

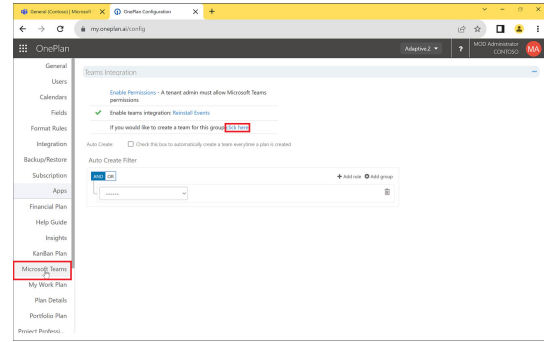


A new Team is created with the same name as your OnePlan plan. There is also a OnePlan tab in the Team **General** channel. This OnePlan tab gives access only to the connected plan data. You cannot access other plans or areas from this view.

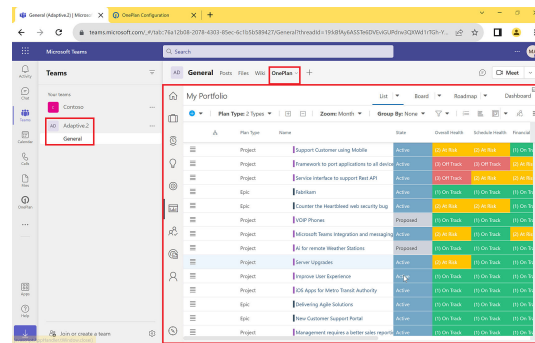


## Create a Group-Level Team from OnePlan

1. Go to the **Admin pages > Microsoft Teams**.
2. Click **Click Here** to create a new group-level team in your Teams instance.



In Teams, a new Team is created with the same name as your OnePlan group. There is also a OnePlan tab in the Team **General** channel. The OnePlan tab gives access to all plans and relevant areas in your OnePlan group.



## Connect OnePlan to Existing Teams or Teams Channels

This article explains how to add OnePlan to an existing Teams instance, or to an existing Teams Channel.

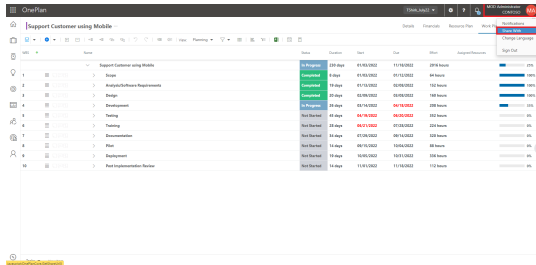
It is easy to connect OnePlan to your Teams environment. There are a few ways to add OnePlan into existing Teams:

- You can add the OnePlan Work Plan as a tab directly to an existing team for tailored access to only the relevant work plan. See [Add a OnePlan Work Plan as a Channel Tab in Teams \[32\]](#).
- You can add the OnePlan app to the left rail navigation for full access to all OnePlan areas. This is really a fused interface where you can access all OnePlan has to offer, right from Teams. See [Add OnePlan to the Left Rail in Teams \[33\]](#).

- You can also add a OnePlan app tab directly to an existing team for full access to all OnePlan areas. See [Add OnePlan as a Channel Tab in Teams \[33\]](#).

## Add a OnePlan Work Plan as a Channel Tab in Teams

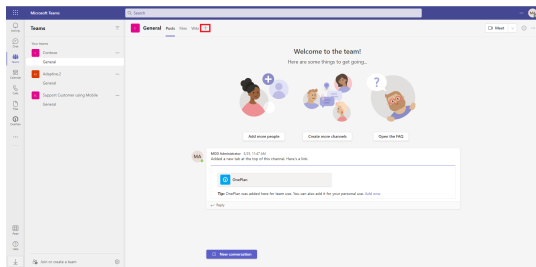
- Go to the desired work plan in OnePlan. Click the user menu, then Share With. The Shared URL form will open.



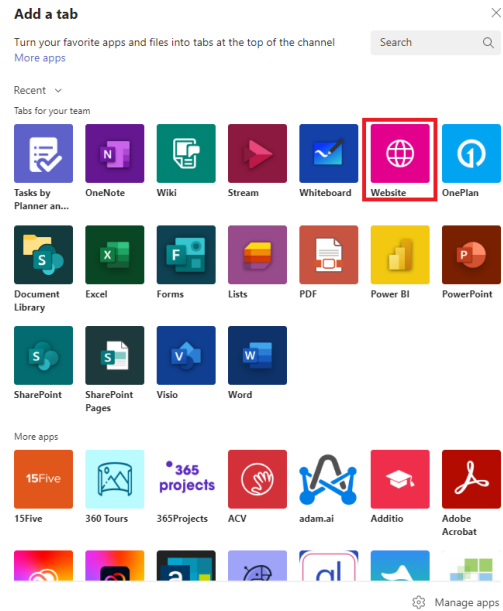
- Select the entire URL. Save the URL for later use, such as in a notepad file.



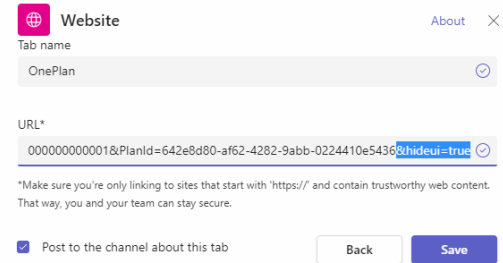
- In the desired Team, click **Add a tab**. The **Add a tab** form will open.



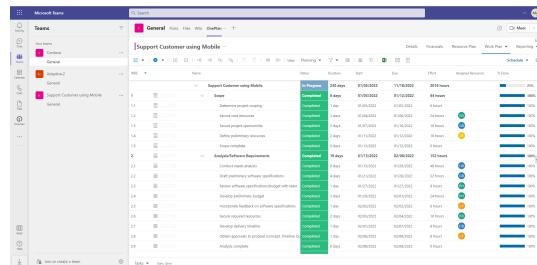
- Select **Website**.



- Name the tab, and paste your OnePlan work plan URL from step 1 into the URL field. At the end of the URL add **"&hideui=true"**. Then click **Save**.

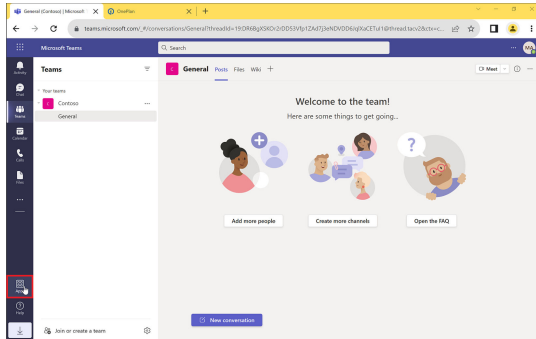


The OnePlan work plan has been added as a tab in teams.

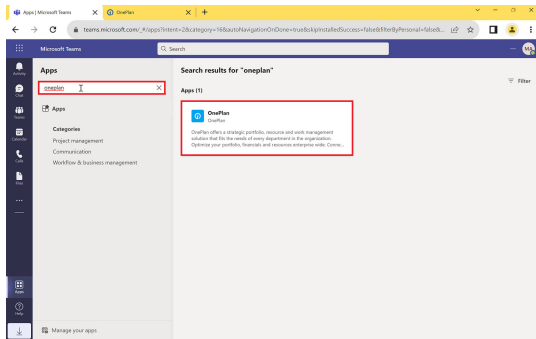


## Add OnePlan to the Left Rail in Teams

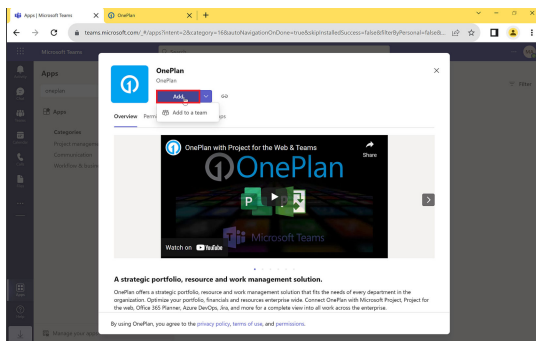
1. Click the **Apps** icon. The **Apps** window will open.



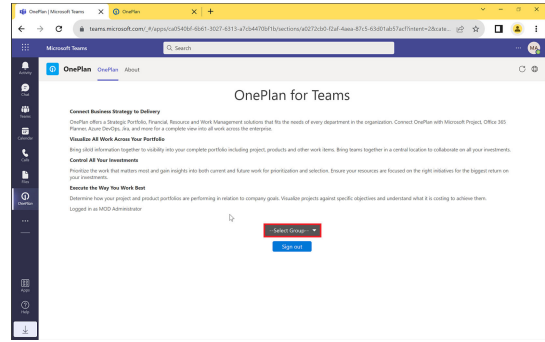
2. Search for and select the OnePlan app.



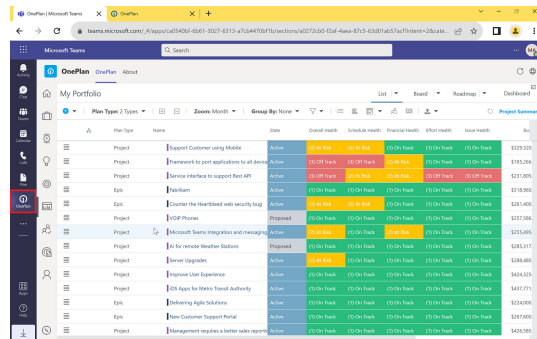
3. Click **Add** to add OnePlan as an app within Teams.



4. Select your OnePlan group and click **Save**.



The OnePlan app is now available in the left rail navigation of Teams. Click the OnePlan icon to access to all plans and relevant areas in your OnePlan group.

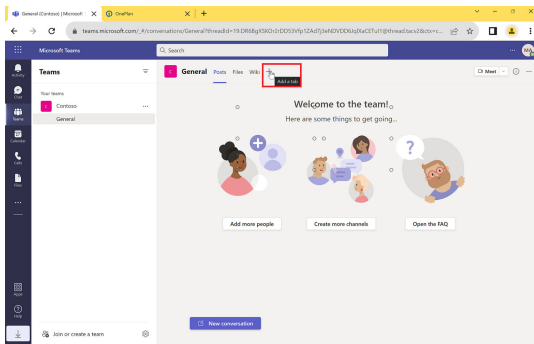


## Add OnePlan as a Channel Tab in Teams

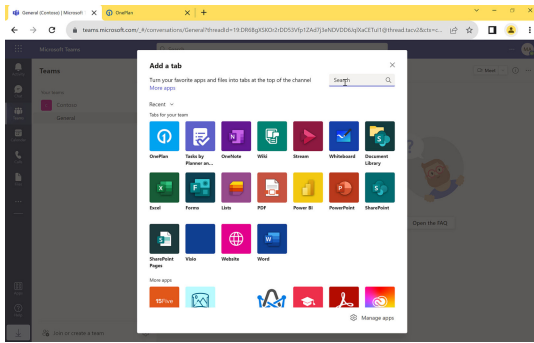
There are two methods to add OnePlan as a channel tab in Teams.

Using the **Add a tab** button.

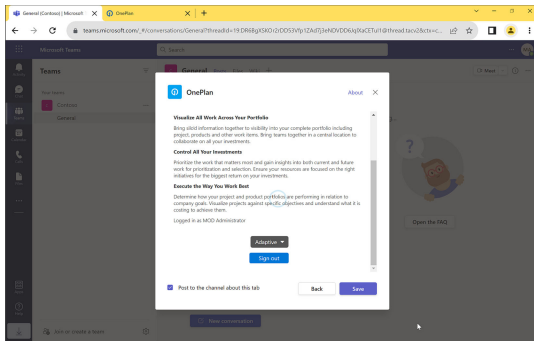
1. In the desired Team, click **Add a tab**. The **Add a tab** form will open.



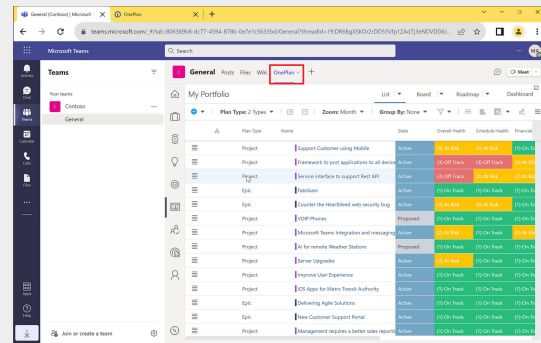
2. Search for and select OnePlan.



3. Select your OnePlan group. Then click **Save**.



There is now a OnePlan tab in your selected channel. The OnePlan tab gives access to



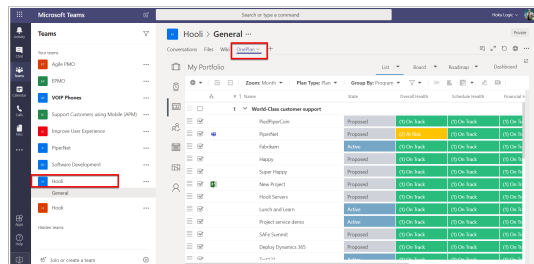
## How do I use OnePlan in a Group within a Team?

This article explains how to use OnePlan in Microsoft Teams. Your administrator will enable OnePlan for Teams. You may access Teams via the desktop app or via the web browser.

### Group Level Team

Typically, you will have a Group Team, meaning a portfolio level Team for viewing & managing all the OnePlan plans.

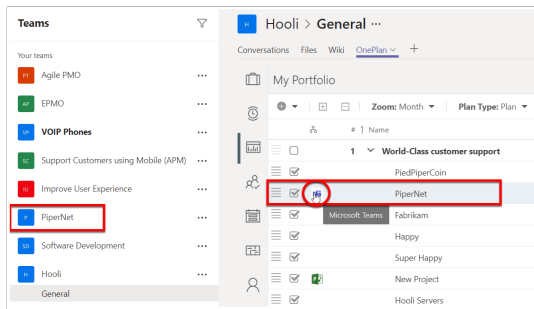
4. Search for and select the channel where you would like to add the OnePlan tab.  
Select the Team that is the name of your OnePlan Group. Click on the OnePlan tab to see all the OnePlan content and modules.



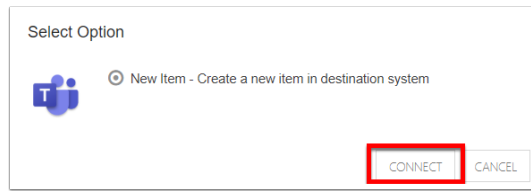
## Plan Level Teams

A separate Team may be created for each plan, as needed. If a plan has its own Team already connected, the name of the Team will be the name of the Plan. On the Portfolios page, a Microsoft Teams icon will show on the Plan row. Click on the Team name in your Teams navigation or click the Teams icon to open that Team.

It's possible that a separate Team is created for every Plan created, or the Teams may need to be created on demand, as needed. If unsure, verify with your OnePlan administrator which is the case for your organization.



If a Team doesn't yet exist for this Plan, you will see "New Item - Create a new item in the destination system." Click the Connect button.

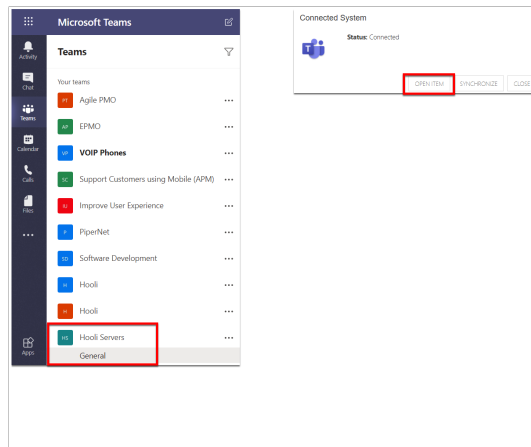


## Work in a Plan's Team

When viewing a Plan Team, the focus is only on that one Plan. You may navigate to the available modules, and manage your plan.

Once the Team is created/connected, click Open Item, or select the Team in the Teams navigation.

Cost Category	Expense Type	Totals	Compare Totals				
			Aug 2019	Sep 2019	Oct 2019	Nov 2019	Dec 2019
Plan Total		2,140,640.00	105,000.00	90,000.00	40,000.00	95,200.00	40,000.00
Labor		2,140,640.00	105,000.00	90,000.00	40,000.00	95,200.00	40,000.00
Business Analyst		440,000.00	41,000.00	23,000.00	38,000.00	23,000.00	
Developer		1,031,200.00	35,000.00	34,000.00		32,400.00	
Project Manager		490,000.00	22,000.00	21,000.00	23,000.00	22,000.00	23,000.00
Support		163,440.00				2,800.00	
Materials and Supplies		0.00					
Travel and Expenses		0.00					
Contracts		0.00					
Software		0.00					
Other		0.00					



## Create a new Plan Team

You may connect your Plan to a new Team either from the OnePlan website or from within Teams. Open the Plan for which you will connect a new Team. Expand the Plan menu. Select Microsoft Teams.

## How do I store Project schedules in Teams for my OnePlan group?

This article explains how to set up your OnePlan group to store Microsoft Project Desktop files in a shared Teams Files document library.

This feature requires BOTH the Project Professional and Microsoft Teams apps be installed and configured for your OnePlan group.

### Why should we use this feature?

This feature allows the schedule files to be in a shared document library, in other words a central hub for your OnePlan group's schedule files. The latest version is saved and accessed from the central library. So, there is no longer the need to look for the latest version or need to use email to share Project schedule files between users. This new feature also prevents people publishing over each other from local desktop copies of the schedule, which could be out-of date.

### Install Apps

If you haven't already installed the required OnePlan apps, do so first.

[How do I set up Project Desktop for OnePlan? \[70\]](#)

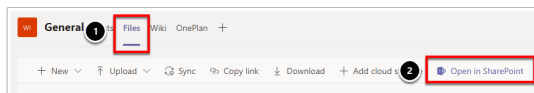
[How do I manage OnePlan in Microsoft Teams?](#)

Configure the Microsoft Teams app and create a group-level team for your OnePlan group.

### Open Files in SharePoint

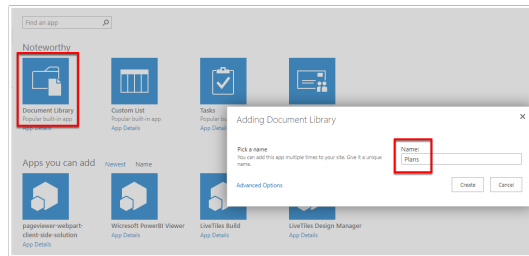
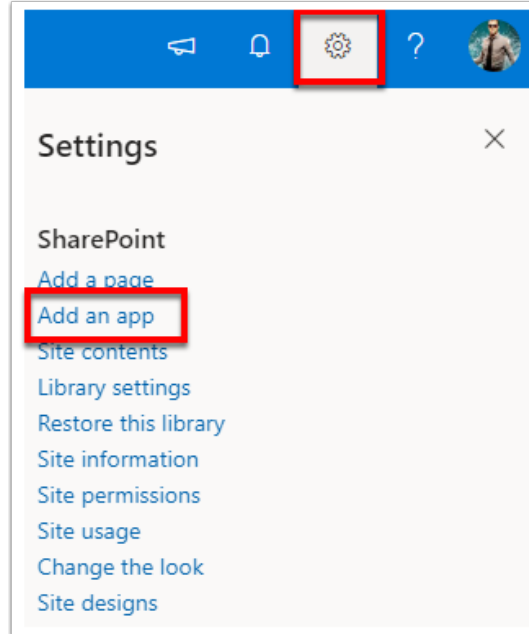
Navigate to Teams. Select your OnePlan group-level team.

1. Open the **Files** library.
2. Click **Open in SharePoint**.



### Create "Plans" Document Library

1. In SharePoint, **add an app**.
2. Select **Document Library** as the type.
3. Name the Document Library **"Plans"**.



### Upload Microsoft Project Templates

1. In SharePoint, **add an app**.
2. Select **Document Library** as the type.
3. Name the Document Library **"PlanTemplates"**.
4. Upload your Microsoft Project **.mpp** templates



# MS Project Online Integration

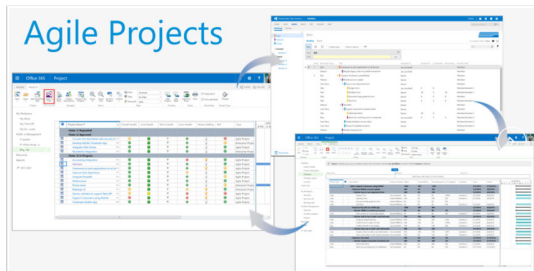
## Project Online and Visual Studio Team Services (VSTS): Areas and Areas with Items

This article explains the main use case and out-of-box capabilities for the OnePlan integration between Project Online and Visual Studio Team Services (VSTS): Areas, using the OneConnect integration platform. There is an integration for "Areas" and an integration for "Areas with Items." They are similar, but the "Areas with Items" integration has some additional data that sync over (VSTS Work Items to Project Online Tasks). Refer to the process steps to see the specific process for how these two integrations work.

### About

OneConnect for Visual Studio Online offers a seamless approach to exchange critical information between development teams and project teams using Project Online and Visual Studio.

This integration specifically synchronizes projects from Project Online to VSTS as **Areas**. VSTS work items (typically tasks & bugs) synchronize back to ProjectOnline as project **Tasks**.



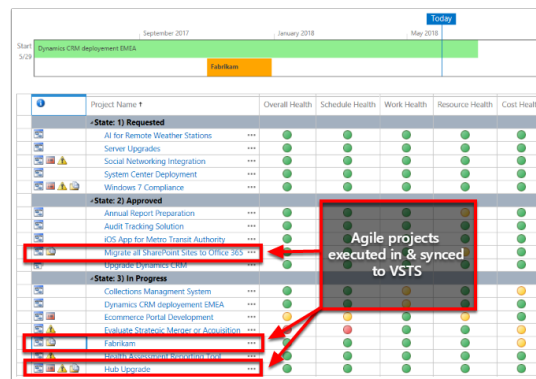
### Key Capabilities

## Agile Project Visibility in Project Online

Synchronize key data between Project Online and Visual Studio to establish enterprise level portfolio level visibility. Regardless of team execution methodology (i.e. waterfall or agile), projects are centrally visible for analysis & reporting.

These two integrations synchronize Project Online Projects to VSTS Areas.

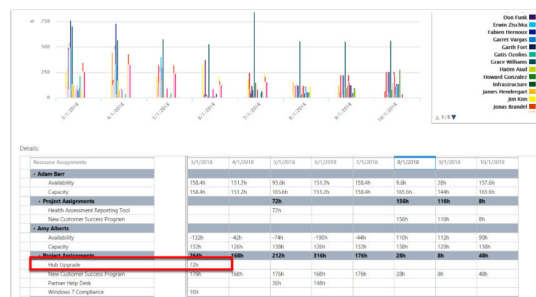
- **"Areas"**: Project Online projects sync as Areas under a selected Team Project.
- **"Areas with Items"**: Project Online projects sync as Areas under a selected Team Project . Additionally, Project tasks sync to two levels as work items, typically Features & User Stories.



## Resource Management

Build better forecasts and gain greater insight into capacity & demand, taking into account all types of projects when optimizing your portfolio of projects. See all work assigned (project online workload and VSTS workload).

Resources are mapped via same email address in both Project Online & VSTS, typically their Active Directory (AD) account.



## Timesheets / Actual Work

Completed hours entered into VSTS sync back to Project Online Timesheets. Users don't need to do double entry of time/actual work hours.

Task Name/Description	Work	Time Type	Sun 5/20	Mon 5/21	Tue 5/22	Wed 5/23	Thu 5/24	Fri 5/25	Sat 5/26
Project Name: Administrative									
Project Name: Dynamics CRM deployment EMEA	1,127								
Project Name: Ecommerce Portal Development	177.00								
Project Name: Fabrikam	199.60								
Advanced Error Checking	7.50h	Actual		2h					
Create Form to collect CC info	1.00h	Actual		2h	4h				
Credit Card info is not saving	1.00h	Actual							
Integrate PayPal interface	4.00h	Actual				2h			
Test form	4h	Actual		2h		5h			
Project Name: Health Assessment Reporting Tool	54h								

## Areas Process

This is the high level process flow for using the integration.

- As Areas reside beneath a parent VSTS Team Project & Area Path, the Team Project must first exist in VSTS before creating the project in Project Online.
- Create a new project in Project Online. When the integration is configured, a new field get created in Project Online. The field is "TeamAreaProject," which is a lookup table populated with the Team Projects from VSTS. Select the Team Project.
- Teams may use their normal process for project approval, portfolio analysis, etc.
- When a project is active & ready to execute using VSTS with an agile methodology, the PM synchronizes the project to VSTS by clicking on the synchronize button. A new Area is created with the same project name under the earlier selected Team Project.
- The PM builds out the project's agile plan under the area path - the epics, features, user stories, task & bugs.
- The PM puts work items (tasks & bugs) into an iteration. This is important, as only items noted into an iteration will sync back to Project Online.
- Team members work using VSTS as usual. They update status on work items (tasks & bugs), enter hours (remaining, etc).
- Updates sync back to Project Online. The data that syncs back is based on the configuration settings mapped fields. This can be done on a scheduled timed-basis or on-demand. The schedule is part of the configuration settings (hourly, daily, etc.). If syncing on-demand, you must go into Project Online & click Sync. This will pull in the changes/updates from VSTS.
- Back in Project Online, the project is updated with the VSTS work items as Tasks in the project schedule. Note: the tasks come in flat rather than with a WBS (work breakdown structure) hierarchy.

## Areas with Items Process

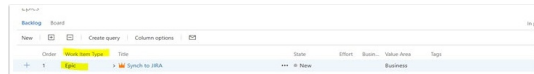
This is the high level process flow for using the integration. The "Epics with Items" process is similar, with some additional notes as follows.

- As Areas reside beneath a parent VSTS Team Project & Area Path, the Team Project must first exist in VSTS before creating the project in Project Online.
- Create a new project in Project Online. When the integration is configured, a new field get created in Project Online. The field is "TeamAreaProject," which is a lookup table populated with the Team Projects from VSTS. Select the Team Project.
- Teams may use their normal process for project approval, portfolio analysis, etc.
- Build out the project plan. The summary tasks and child tasks will sync to VSTS as two levels, based on how the integration is configured. Typically, summary tasks would be synced to Epics and the child tasks would be synced to Features. To govern which tasks will sync, there's a new field in the Tasks list called "VSTS Task Item." In the plan, select the VSTS task item for the tasks to synchronize.
- When a project is active & ready to execute using VSTS with an agile methodology, the PM synchronizes the project to VSTS by clicking on the synchronize button. A new Area is created with the same project name under the earlier selected Team Project. The project tasks get created as Epics & Features (or the configured levels, if different).
- The PM builds out the project's agile plan under the new Area with the Epics, Features, User Stories, Tasks & Bugs.
- The PM puts work items (tasks & bugs) into an iteration. This is important, as only items noted into an iteration will sync back to Project Online.

8. Team members work using VSTS as usual. They update status on work items (tasks & bugs), enter hours (remaining, etc).
  9. Updates sync back to Project Online. The data that syncs back is based on the configuration settings mapped fields. This can be done on a scheduled timed-basis or on-demand. The schedule is part of the configuration settings (hourly, daily, etc.). If syncing on-demand, you must go into Project Online & click Sync. This will pull in the changes/updates from VSTS.
  10. Back in Project Online, the project is updated with the VSTS work items as Tasks in the project schedule. Note: the tasks come in flat rather than with a WBS (work breakdown structure) hierarchy. They come in at the bottom of the plan. Note: the tasks do not sync into the project plan under the "features" tasks.
- User can only enter a single work item type in the VSTS Work Item Type column in the connector GUI.
  - If user does not enter/leave empty the work item type column, it will by default be "Area" work item type.
  - Invalid input work item type will not let current new item being synched gets created in VSTS.
  - Invalid input on work item type will not let current item being synched gets updated on its item type field in VSTS, if this work item has ever been mapped before.
  - When user enter a single work item type in the GUI, it must be very specific to the work item type shown in VSTS (They are case-sensitive). Take an example from the below picture, when mapping "Epic" work item type, the value entered on the GUI of the connector must follow the same key word "Epic", see the highlighted part below. (Column name: VSTS Work Item Type)

## Important Notes

- If Areas are created first in VSTS, they are not automatically synced to Project Online as a new project.
- The integration is also supported on Team Foundation Services (On-Premise), but only for the following versions: 2015, 2017, & 2018.
- Must have full admin privileges/accounts in both Project Online & VSTS to configure the integration.
- The default VSTS Work Item types are Tasks and Bugs. These sync to the Project Online Tasks list. Other types can be configured to also come over, such as Features, User Stories, etc. but they will still come in as project tasks, in a flat hierarchy.



## Restrictions/Rules/Limitations

- Basic mapping rule: Make sure to map fields that are required by the other side of the connector (in this case is VSTS), if the fields are required by VSTS, then mapped the fields of that item to get synchronized from Project Online to VSTS.
- Empty TeamAreaProject field in Project Online is not allowed. (\*Has to have a VSTS Team Project for the project)
- To support multi-level area path in Project Online's lookup table, user needs to adjust the code mask section in the lookup table settings based on the number of level the user need. (eq. 4 level = \*.\*.\*.\*)
- When a user deletes an item in VSTS, the next time the scheduler runs, it will still synchronize (recreate) that item from Project Online to VSTS. Unless the item is also deleted in Project Online, then that item will never be synchronized back to VSTS.
- Changing area path to a different team project is not allowed by VSTS. Only changing area path level within the same team project that has been initialized at the first time the work item is synchronized is allowed.
- Parent item name declared in Project Online lookup table needs to be in this specific format: "parent name - parent id", where the parent id is placed at the very end after "-".
- Attempting to change the parent item of the already mapped item is not currently supported. Parent item will be linked to the current item being mapped only during the first creation of this item to VSTS. The later the scheduler runs, any updates related to parent item will not get updated. \*If user did not enter/wrong input the parent item in the project field in PJO, delete the item from VSTS, and assigned the correct parent item to the field in PJO, and have it synchronized back to VSTS/wait for the scheduler to run.

- Sample of the input for work item type to be synched to VSTS and work item type that will be synched to PJO as Task: (Same rule regarding work item type case sensitivity when getting input in the GUI, explained above)

- Work item types need to be at an iteration to get synched to Project Online. Only tasks and bugs need to be in an iteration; other work item types (Non-Bug and Non-Task) will just be brought over to Project Online as Tasks.
- VSTS Synchronize Button Functionality Expectation:
  - Create a newly created project in Project Online to VSTS work item type.
  - If the item has already been created/synched to VSTS before through the button, the next time the button is clicked, it will only update back to Project Online from VSTS. Any updates in Project Online to VSTS will never be made through the button (Therefore, the "ProjectPublish" strategy is needed to synch over updates from Project Online to VSTS).

## Notes

- Mapping projects from Project Online to VSTS Team Area (Projects -> Areas):
  - Able to create a team area in VSTS from a project in project online.
- Mapping items from VSTS to Project Online tasks (Tasks -> Items):
  - Able to select the work item type in VSTS below the Area item and it will be mapped as task schedule table in Project Online.
- Mapping team area projects from VSTS to Project Online lookup table (Lookup\_TeamAreaProject -> TeamAreaProjects)
  - Able to synchronized team area project level (Currently support up to 100 levels) to a TeamAreaProject lookup table in Project Online.

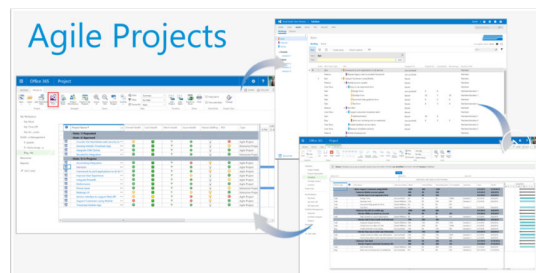
## Project Online and Visual Studio Team Services (VSTS): Epics and Epics with Items

This article explains the main use case and out-of-box capabilities for the OnePlan integration between Project Online and Visual Studio Team Services (VSTS): Epics, using the OneConnect integration platform. There is an integration for Epics and an integration for Epics with Items. They are similar, but the Epics with Items integration has some additional data that sync over (tasks to VSTS work items). Refer to the process steps to see the specific process for how these two integrations work.

### About

OneConnect for Visual Studio Online offers a seamless approach to exchange critical information between development teams and project teams using Project Online and Visual Studio.

This integration specifically synchronizes projects from Project Online to VSTS as **Epics**. VSTS work items (typically tasks & bugs) synchronize back to Project Online as project **Tasks**.



### Key Capabilities

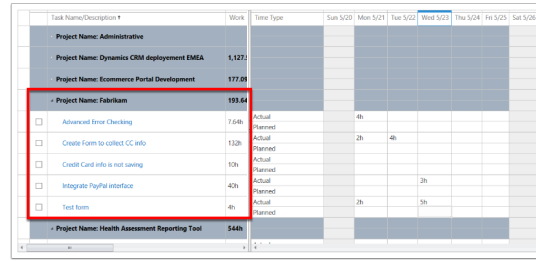
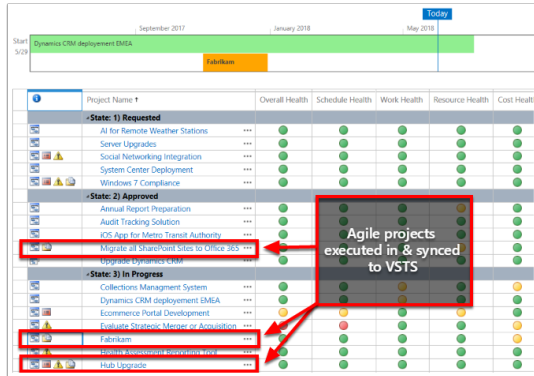
#### Agile Project Visibility in Project Online

Synchronize key data between Project Online and Visual Studio to establish enterprise level portfolio level visibility. Regardless of team execution methodology (i.e. waterfall or agile), projects are centrally visible for analysis & reporting.

These two integrations synchronize Project Online Projects to VSTS Epics.

- **"Epics"**: Project Online projects sync as Epics under a selected Team Project & Area Path.

- **"Epics with Items":** Project Online projects sync as Epics under a selected Team Project & Area Path. Additionally, Project tasks sync to two levels as work items, typically Features & User Stories.



## Epics Process

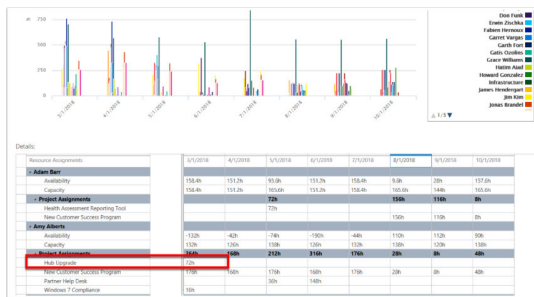
This is the high level process flow for using the integration.

1. As Epics reside beneath a parent VSTS Team Project & Area Path, the Team Project & Area Path(s) must first exist in VSTS before creating the project in Project Online.
2. Create a new project in Project Online. When the integration is configured, a new field get created in Project Online. The field is "TeamAreaProject," which is a lookup table populated with the Team Projects & Area Paths from VSTS. The lookup field is hierarchical. Select an Area Path under the Team Project.
3. Teams may use their normal process for project approval, portfolio analysis, etc.
4. When a project is active & ready to execute using VSTS with an agile methodology, the PM synchronizes the project to VSTS by clicking on the synchronize button. A new Epic is created with the same project name under the earlier selected Team Project & Area Path.
5. The PM builds out the project's agile plan under the epic - the features, user stories, task & bugs.
6. The PM puts work items (tasks & bugs) into an iteration. This is important, as only items noted into an iteration will sync back to Project Online.
7. Team members work using VSTS as usual. They update status on work items (tasks & bugs), enter hours (remaining, etc).
8. Updates sync back to Project Online. The data that syncs back is based on the configuration settings mapped fields. This can be done on a scheduled timed-basis or on-demand. The schedule is part of the configuration settings (hourly, daily, etc.). If syncing on-demand, you must go into Project Online & click Sync. This will pull in the changes/updates from VSTS.

## Resource Management

Build better forecasts and gain greater insight into capacity & demand, taking into account all types of projects when optimizing your portfolio of projects. See all work assigned (project online workload and VSTS workload).

Resources are mapped via same email address in both Project Online & VSTS, typically their Active Directory (AD) account.



## Timesheets / Actual Work

Completed hours entered into VSTS sync back to Project Online Timesheets. Users don't need to do double entry of time/actual work hours.



- Back in Project Online, the project is updated with the VSTS work items as Tasks in the project schedule. Note: the tasks come in flat rather than with a WBS (work breakdown structure) hierarchy.

### Epics with Items Process

This is the high level process flow for using the integration. The "Epics with Items" process is similar, with some additional notes as follows.

- As Epics reside beneath a parent VSTS Team Project & Area Path, the Team Project & Area Path(s) must first exist in VSTS before creating the project in Project Online.
- Create a new project in Project Online. When the integration is configured, a new field get created in Project Online. The field is "TeamAreaProject," which is a lookup table populated with the Team Projects & Area Paths from VSTS. The lookup field is hierarchical. Select an Area Path under the Team Project.
- Teams may use their normal process for project approval, portfolio analysis, etc.
- Build out the project plan. The summary tasks and child tasks will sync to VSTS as two levels, based on how the integration is configured. Typically, summary tasks would be synced to Features and the child tasks would be synced to User Stories. To govern which tasks will sync, there's a new field in the Tasks list called "VSTS Task Item." In the plan, select the VSTS task item for the tasks to synchronize.
- When a project is active & ready to execute using VSTS with an agile methodology, the PM synchronizes the project to VSTS by clicking on the synchronize button. A new Epic is created with the same project name under the earlier selected Team Project & Area Path. The project tasks get created as Features & User Stories (or the configured levels, if different).
- The PM builds out the project's agile plan under the new Epic, Features, & User Stories - the tasks & bugs.
- The PM puts work items (tasks & bugs) into an iteration. This is important, as only items noted into an iteration will sync back to Project Online.
- Team members work using VSTS as usual. They update status on work items (tasks & bugs), enter hours (remaining, etc).

- Updates sync back to Project Online. The data that syncs back is based on the configuration settings mapped fields. This can be done on a scheduled timed-basis or on-demand. The schedule is part of the configuration settings (hourly, daily, etc.). If syncing on-demand, you must go into Project Online & click Sync. This will pull in the changes/updates from VSTS.
- Back in Project Online, the project is updated with the VSTS work items as Tasks in the project schedule. Note: the tasks come in flat rather than with a WBS (work breakdown structure) hierarchy. They come in at the bottom of the plan. Note: the tasks do not sync into the project plan under the "features" tasks.

### Important Notes

- If epics are created first in VSTS, they are not automatically synced to Project Online as a new project.
- The integration is also supported on Team Foundation Services (On-Premise), but only for the following versions: 2015, 2017, & 2018.
- Must have full admin privileges/accounts in both Project Online & VSTS to configure the integration.
- The default VSTS Work Item types are Tasks and Bugs. These sync to the Project Online Tasks list. Other types can be configured to also come over, such as Features, User Stories, etc. but they will still come in as project tasks, in a flat hierarchy.
- Mapping projects from PJO to VSTS work item (Projects -> Epics):
  - Able to assign the mapped work item's area path in VSTS. (Support multi-level area path)
  - User entered the field over in PJO's projects field and specify its area path. When the scheduler runs, the projects synced over to VSTS will get assign to the correct area path.
  - User can update the area path of the work item that has been mapped, when the scheduler is run at future time. (Only area path within the same level of team area project assigned to the work item type at first synced to VSTS)
  - Able to generalize mapping work item type to VSTS. (Not specifically for Epics only)
- User can enter their valid desired work item type over in the connector GUI, and specify the work item type (Epic, Bug, Feature, etc..)

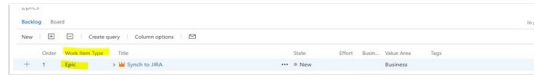
- User can update/change the work item’s type that has been mapped, when the scheduler is run at future time.
- Able to link the work item type to its corresponding parent item type when synchronizing the item from Project Online to VSTS.
- User will specify in the PJO’s projects field its parent item type, and when the scheduler runs, the item type being synchronized will be linked to its corresponding parent item type.
- Mapping items from VSTS to Project Online tasks (Tasks -> Items):
  - Able to select the work item type in VSTS below the parent item and it will be mapped as task schedule table in Project Online.
- Mapping team area projects from VSTS to Project Online lookup table (Lookup\_TeamAreaProject -> TeamAreaProjects)
  - Able to synchronized team area project level (Currently support up to 100 levels) to a TeamAreaProject lookup table in Project Online.

**Restrictions/Rules/Limitations**

- Basic mapping rule: Make sure to mapped fields that are required by the other side of the connector (in this case is VSTS), if the fields are required by VSTS, then mapped the fields of that item to get synchronized from Project Online to VSTS.
- Empty TeamAreaProject field in Project Online is not allowed. (\*Has to have an area path for the project)
- To support multi-level area path in Project Online’s lookup table, user need to adjust the code mask section in the lookup table settings based on the number of level the user need. (eq. 4 level = \*.\*.\*.\* )
- User can only enter a single work item type in the VSTS Work Item Type column in the connector GUI.
- If user does not enter/leave empty the work item type column, it will by default be “Epic” work item type.
- Invalid input work item type will not let current new item being synched gets created in VSTS.
- Invalid input on work item type will not let current item being synched gets updated on its item type

field in VSTS, if this work item has ever been mapped before.

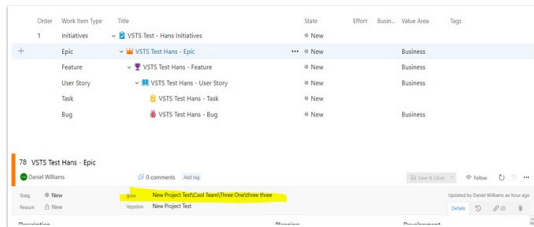
- When user enter a single work item type in the GUI, it must be very specific to the work item type shown in VSTS (They are case-sensitive). Take an example from the below picture, when mapping “Epic” work item type, the value entered on the GUI of the connector must follow the same key word “Epic”, see the highlighted part below. (Column name: VSTS Work Item Type)



- When user delete an item in VSTS, the next time the scheduler runs, it will still synchronize (recreate) that item from Project Online to VSTS. Unless the item is also deleted in Project Online, then that item will never be synchronized back to VSTS.
- Changing area path to a different team project is not allowed by VSTS. Only changing area path level within the same team project that has been initialized at the first time the work item is synchronized is allowed.
- Parent item name declared in Project Online lookup table need to be in this specific format: “parent name parent id”, where the parent id is placed at the very end after “-“.
- Attempting to change the parent item of the already mapped item is not currently supported. Parent item will be linked to the current item being mapped only during the first creation of this item to VSTS. The later the scheduler runs, any updates related to parent item will not get updated. \*If user did not enter/wrong input the parent item in the project field in PJO, delete the item from VSTS, and assigned the correct parent item to the field in PJO, and have it synchronized back to VSTS/wait for the scheduler to run.
- Sample of the input for work item type to be synched to VSTS and work item type that will be synched to PJO as Task: (Same rule regarding work item type case sensitivity when getting input in the GUI, explained above)



- Work item types in VSTS that will be synched to Project Online as Task schedule needs to be at the same project area path with its parent project area path. For instance, from the picture below, a user want to synched work items that are below “VSTS Test Hans Epic” as Task in Project Online, with this specified work items type only: Feature, Task, and Bug. So these items need to have the same area path as “VSTS Test Hans Epic” which is shown in the second picture below.



- Work item types need to be at an iteration to get synched to Project Online. Only tasks and bugs need to be in an iteration; other work item types (Non-Bug and Non-Task) will just be brought over to Project Online as Tasks.
- VSTS Synchronize Button Functionality Expectation:
  - Create a newly created project in Project Online to VSTS work item type.
  - If the item has already been created/synched to VSTS before through the button, the next time the button is clicked, it will only update back to Project Online from VSTS. Any updates in Project Online to VSTS will never be made through the button (Therefore, the “ProjectPublish” strategy is needed to synch over updates from Project Online to VSTS).

## Deploy OnePortfolio into Project Online

Since the Project Online site already exists, the OnePortfolio lists need to be added individually. There are numerous list templates to be uploaded. Majority of the list templates are without content. A few of the list templates have content, or need to have content added. i.e. Years, Expense Types, etc.

### Templates

- Actual Costs

- Benefits
- Budgets
- Capacity
- Changes
- Cost Categories
- Expense Type (Add Content - Capital & Operational)
- Forecast
- Initiatives (\*Optional/If Using, SP Form in use)
- Issues
- Portfolios (SP Forms in use)
- Requests (\*Optional/If Using, SP Forms in use)
- Resource Plan
- Resources
- Risks
- Roadmap
- Status Reports
- Strategic Themes
- Style Library (Add Content - Portfolios.js)
- Workflow Tasks
- Years (Add Content - 2018, 2019, 2020, etc.)

### SP Forms

Saved/exported SP forms to be imported to the following lists

- Portfolios (Separate New, Display, Edit)
- Requests (New, Display, Edit all the same)

### Workflows

Add the following two workflows:

- Portfolio Approval Workflow (Portfolios List)
- Create Status Report Workflow (Portfolios List)

### Reports

- Update Queries to new site in the OnePortfolio Main Report & publish to PowerBI
- Add Content - Report site page with Wicresoft Report Viewer web part - point to published OnePortfolio Main Report - set the page as the home page

### Features Purchased/Installed/Activated

Necessary features:

- Power BI
- SP Forms



## Project Online to OnePlan

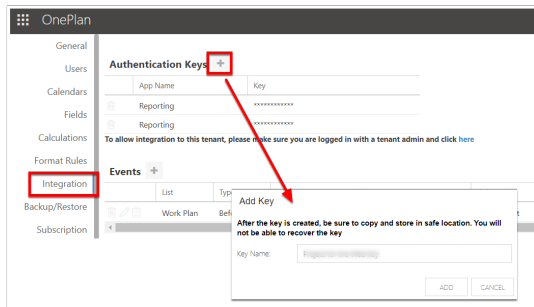
This article explains how to set up the integration between your OnePlan group/environment and Microsoft Project Online.

This integration focuses on using Project Online with OnePlan.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name & generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### OneConnect Setup



#### NOTE

To complete the OneConnect setup, you need have Administrator or Editor privileges in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.

2. Click **Add Integration**.
3. Locate the **Project Online to OnePlan** integration.



#### NOTE

There are two integrations between Project Online and OnePlan:



or



4. Click **Configure**. The Integration configuration form will open.
5. Complete the integration configuration form.
  - a. Complete the **Project Online** section.
    - **Site URL**: Enter the Project Online URL (e.g., `https://{OrganizationName}.sharepoint.com/sites/{SiteName}`).
    - **Username**: Enter the username.



#### NOTE

The username must not have Multi-Factor Authentication (MFA) associated with it. Because of this, we encourage a service account to be used to access the SharePoint site.

**NOTE**

It is standard best practice to have a single service account be associated to a single integration. If a service account is associated to multiple integrations, throttling can occur from Microsoft, which can lead to strategy failures.

- **Password:** Enter the password for the Username.

- **(Suggested) Client Id + Modern Authentication Checkbox:** If desired, modern authentication is available. For instructions to set up modern authentication, see [Set Up Project Online Modern Authentication](#).

- **(Optional – Checkbox) Use timesheet hours as actuals:**
- **(Optional - Checkbox) On-premises Project Server:** If using Project Server, check this box.
- **(Optional) Enterprise Project Type (UID):**
  - b. Click **Next**.
  - c. Complete the **OnePlan** section.

**NOTE**

Expand the **Additional Options** area to see all the necessary fields to be filled in.

- **Group Name:** Enter the OnePlan Group name you will be integrating into.
- **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
- **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than `https://my.oneplan.ai`, please select the appropriate URL here.

**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

- **(Optional) OnePlan Default Plan Type:** This is to be used in replace of the Portfolio Plan Type field mapping, should one not be provided automatically within the integration. This is to provide a default plan type for any plan level work items that are brought into OnePlan. A single value should be entered.

**Group Name**

OnePlan group name that the integration is connecting to.

**Authentication Key**

Authentication Key is generated in the integration tab within the OnePlan configuration.

**Authentication Key Name**

Use when connecting to OnePlan OData.

▶ Additional Options

▶ Advanced Options

▶ Relay Options

**Test** **Save**

d. Click **Next**.

## Integration Information

### Functionality

This integration has two main use cases for functionality.

Project Online and OnePlan (Task assignments to Resource Engagements)

- Ability to create/update Plan in OnePlan
- Ability to create/update Project in Project Online
- Ability to create/update Resource engagements in Project Online based on Task Assignments in OnePlan
- Ability to create/update resources in OnePlan based on Project Online resource pool

Project Online and OnePlan (Resource Plans to Resource Engagements, Tasks to Tasks)

- Ability to create/update Plan in OnePlan
- Ability to create/update Project in Project Online
- Ability to create/update tasks in Project Online
- Ability to create/update Resource engagements in Project Online based on Resource Plans in OnePlan
- Ability to create/update resources in OnePlan based on Project Online resource pool

### Button Added

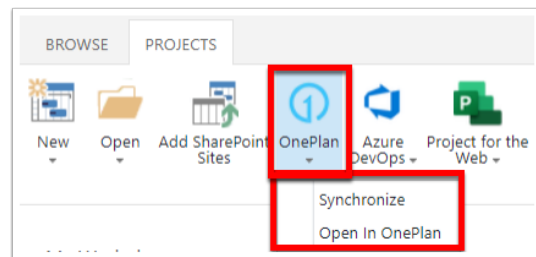
... This integration installs the OnePlan button on the PWA site ribbon.

### Synchronize

- When the selected project has never been synchronized before, this button will perform “**ProjectPublish**” action on that project. Action is further explained in the section below.
- When the selected project has been synchronized/connected to a plan in OnePlan, this button will perform “**OnePlanToPjo**” action on that project. Action is further explained in the section below.

### Open in OnePlan

- Open the associated OnePlan plan.



## Scheduled Jobs / Actions Available

1. Project Online and OnePlan (Resource Engagements to Task Assignments)

- ProjectPublish
  - Create/update Plan in OnePlan
- OnePlanToPjo
  - Create/update project in Project Online
  - Create/update Resource engagements in Project Online based on Task Assignments in OnePlan
- SynchLookups
  - Synchronize any lookup fields values into any choice fields in OnePlan
- SynchResources
  - Create/update resources in OnePlan based on Project Online resource pool

2. Project Online and OnePlan (Resource Engagements to Resource Plans, Tasks to Tasks)

- ProjectPublish

- Create/update Plan in OnePlan
- OnePlanToPjo
  - Create/update project in Project Online
  - Create/update tasks in Project Online
  - Create/update Resource engagements in Project Online based on Resource plans in OnePlan
- SynchLookups
  - Synchronize any lookup fields values into any choice fields in OnePlan
- SynchResources
  - Create/update resources in OnePlan based on Project Online resource pool

## Default Field Mappings

### 1. Project Online and OnePlan (Resource Engagements to Task Assignments)

Projects (Project Online) <--> Plans (OnePlan)

Project Online Fields	OnePlan Fields
Name	Name
Owner	Owner

Enterpriseresourceengagements (Project Online) <--> Tasks (OnePlan)

Project Online Fields	OnePlan Fields
Start Date	StartDate
Finish Date	EndDate
Work Hours	Effort
Email	AssignedTo
Name	Name

Resources (Project Online) <--> Resources (OnePlan)

Project Online Fields	OnePlan Fields
Email	Email
isGeneric	Generic
Name	DisplayName

### 2. Project Online and OnePlan (Resource Plans to Resource Engagements, Tasks to Tasks)

Projects (Project Online) <--> Plans (OnePlan)

Project Online Fields	OnePlan Fields
Name	Name
Owner	Owner

Enterpriseresourceengagements (Project Online) <--> Resource Plans (OnePlan)

Project Online Fields	OnePlan Fields
Email	Resource
State	State
Date (timephased)	Date
Work Hours	* (see note below)

\* In order for the Resource Engagement to work, you will need to add an extra mapping that indicate the Resource Plan Cost Type/Type to the 'Work Hours'. This field mapping indicates which Resource Plan Type to bring into Project Online.

Resources (Project Online) <--> Resources (OnePlan)

Project Online Fields	OnePlan Fields
Email	Email
isGeneric	Generic
Name	DisplayName

Tasks (Project Online) <--> Tasks (OnePlan)

Project Online Fields	OnePlan Fields
Name	Name
Start Date	StartDate
Finish Date	EndDate
Assigned To	AssignedTo

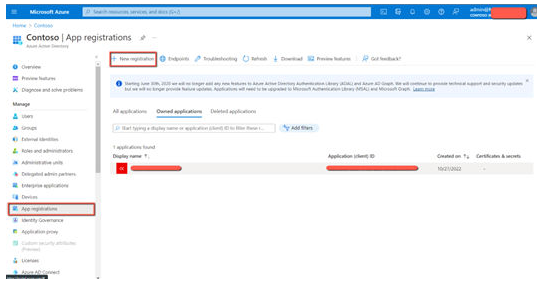
## Set Up Project Online Modern Authentication

Only the tenant admin can able to set up the Modern Authentication for Project Online (or OneAnalytics) integrations. If you wish to locate the SharePoint or Tabular Data, please navigate to the SharePoint Modern Authentication page.

### Create the App Registration within Azure.

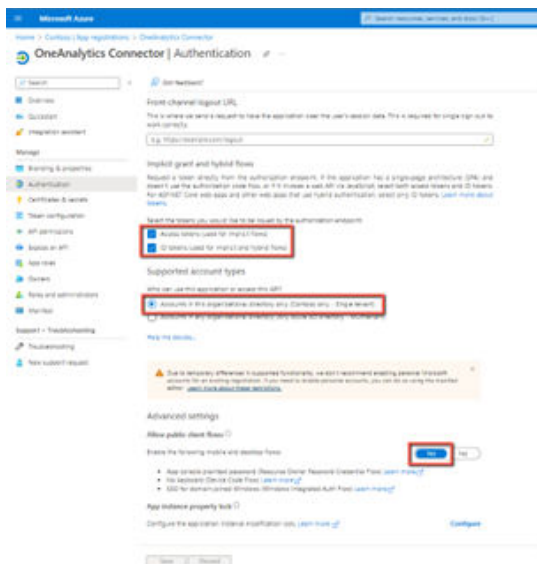
1. While logged in as a tenant admin for the client's organization, log in to portal.azure.com.
2. Navigate to the Azure Active Directory (Azure AD).
3. Within the left navigation bar, go into the App Registration page.
4. On the top Left of the page, create a New Registration.

- Name:** Give the App Registration Name a title.
- Supported Account types:** Single Tenant.
- Redirect URL (Optional):** Dropdown: Web. URL: <https://my.oneplan.ai>.
- Click **Register**.



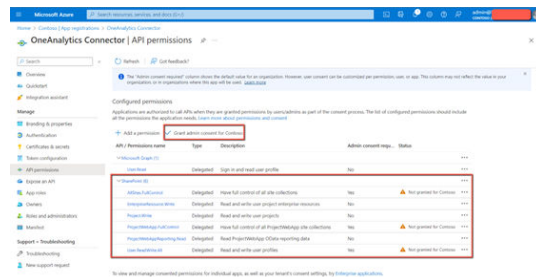
## Set Authentication

- While in the overview for the newly created App Registration, navigate to the **Authentication** page (left navigation panel, beneath **Manage**).
- Scroll down to **Implicit grant and hybrid flows**. Ensure that both the **Access Tokens** and **ID tokens** checkboxes are selected.
- Scroll down to Allow public client flows. Enable the following mobile and desktop flows (ensure this is set to Yes).
- Click **Save**.



## Set API Permissions

- Once finished with the **Authentication** settings for the App Registration, navigate to the **API Permissions** page (left navigation panel, beneath **Manage**).
- Select **Add Permission**.
- Beneath the **Microsoft APIs** tab, select **SharePoint**.
- What type of permissions does your application require? Select **Delegated Permissions**.
- In the dropdown selections, choose these permission levels:
  - All Sites:** Full Control
  - Enterprise Resource:** Write
  - Project:** Write
  - Project Web App:** Full Control
  - Project Web App Reporting:** Read
  - User:** Read Write All
- Once the Permission levels have been set, click **Add Permissions**.
- In the **API Permissions** page, click **Grant Admin consent for {Tenant Name}**.
- Click on **Yes** for the consent confirmation popup.



## OneConnect Setup

- While logged into OneConnect, go to the OneAnalytics (or Project Online) integration.
- In the Project Online setup page, type in the Project Online URL (<https://{TenantSite}.sharepoint.com/sites/{ProjectSite}>).
- Type in the Username + Password of the service account being used (Project Online will require a Username + Password along with the Client Id).
- Expand the **Additional Options** section:
  - Enter the Client Id.

- b. Check the **Modern Authentication** checkbox.
5. Click **Test** to confirm that the connection works as intended.

## Project Online and Office 365 Planner

This integration allows user to synchronize Projects from Project Online to Office 365 Plans. When doing so, you can choose to sync tasks from Project Online to the Office 365 Planner or not. It will also bring back tasks and task updates from Office 365 planner to Project Online.

**Required:** Admin consent/permission to access

### Capabilities

- Synchronizing Projects from Project Online to Office 365 Plans (Projects -> Plans)
- Synchronizing Tasks from Office 365 Planner to Project Online (Tasks <-> Tasks)

All of these operations are run by clicking the Office 365 Planner button in Project Online.

## Project Online to Jira Integration

This article explains how to set up an integration between Project Online and Jira.

### Integration Setup

For this integration, you will need to gather the following information:

#### From Project Online

- Site URL
- Username and Password
- (Optional) Client ID

#### From Jira

- Jira URL
- Username
- API Token. If using Jira Cloud, follow [Generate a Jira Cloud API Token \[50\]](#) to generate an API token.


### Generate a Jira Cloud API Token

To generate an API Token using Jira Cloud, log into the Jira environment to be used.

1. Navigate to [id.atlassian.com/manage-profile/security/api-tokens](https://id.atlassian.com/manage-profile/security/api-tokens).
2. Click **Create API token**. A new window will appear.
3. Give the API Token a **Label**.
4. Click **Create**.
5. The **API Token** will appear on the next page.

### OneConnect

1. Go to [my.oneconnect.ai](https://my.oneconnect.ai).
2. Locate the Project Online to Jira integration. Click the **Configure** button.
3. Complete the configuration form.
  - a. Complete the Project Online section.

 **NOTE**  
Expand the **Additional Options** area to see all necessary fields to be filled in.

- (Optional) Check this box to sync all issues in the backlog
- (Optional) Check this box to roll up sub tasks, resources to its parent
- (Optional) Check this box if you are using Jira Server

d. Click **Next**.

- **Site URL:** Enter the Project Online URL (e.g., *https://<organization>.sharepoint.com/sites/<site>*).
- **Project Online Username:** This will be the email address that will need to have access to the SharePoint site.
- **Password:** Enter the password for the Username.



Site Uri

Project Online Username

Password

## Integration Information

### Project Online Changes

The following Lookup Tables for Custom Fields will be installed within your Project Online upon installation of the integration.

Lookup Table Name	Level	Value
JiraProjectType	1	Business
	1	Service Desk
	1	Software

- **(Optional, Suggested) Client Id + Modern Authentication Checkbox:** If desired, modern authentication is available. See [Set Up Project Online Modern Authentication \[48\]](#) for more information.

Client Id

Select this checkbox if you are using modern app authentication (Make sure to put the client id above if this is checked).

The following Enterprise Custom Fields will be installed within your Project Online upon installation of the integration.

Name	Entity	Type	Lookup Table
Epic	Task	Text	
Jira Original Estimate	Task	Text	
Jira Issue Type	Task	Text	
Feature	Task	Text	
Story	Task	Text	
Iteration	Task	Text	
JiraProjectType	Project	Text	JiraProjectType
Jira Labels	Task	Text	
Jira Fix Versions	Task	Text	
Jira Components	Task	Text	
Jira Reporter	Task	Text	
Jira Priority	Task	Text	
Jira Status	Task	Text	

- b. Click **Next**.  
 c. Complete the Jira section.

- **Jira URL:** Enter the organizations Jira URL (e.g., *https://<organization>.atlassian.net*).
- **Username:** Enter the Jira username that will be used for the integration.
- **API Token:** Enter the Jira Token. If using Jira Cloud, follow the instructions in [Generate a Jira Cloud API Token \[50\]](#).
- **Issue Types:** List the Jira issue types to be brought over into Project Online.

## Default Field Mappings

### Projects - Projects

Project Online Fields	Jira Fields	Direction	Notes
Name	Project Name	Both	Required
JiraProjectType	Project Type	Both	Required
Owner	Owner	Both	Required



**Tasks - Issues**

Project Online Fields	Jira Fields	Direction	Notes
Iteration	Sprint	Both	
Epic	Epic Link	Both	
Jira Issue Type	Issue Type	Both	
Jira Original Estimate	Original Estimate	Both	
Assigned To	Assignee	Both	
Remaining Work	Remaining Estimate	Both	
Start Date	Start Date (Sprint)	Both	
Finish Date	Finish Date (Sprint)	Both	
Name	Summary	Both	
Actual Work	Time Spent	Both	
Jira Labels	Labels	Both	
Jira Fix Versions	Fix Versions	Both	
Jira Components	Components	Both	
Jira Reporter	Reporter	Both	
Jira Priority	Priority	Both	
Jira Status	Status	Both	

**Lookup Jira Project Type - Project Types**

Project Online Fields	Jira Fields	Both	Notes
Lookup Value	Type Name	Both	

**Default Scheduled Strategies**

**SynchTypes:** Synchronizes Jira Project Type Key to Project Online lookup table.

**ProjectPublish:** Synchronizes Projects and Tasks between Project Online and Jira.

**JiraReleaseToMilestone:** Synchronizes Projects and Tasks between Project Online and Jira.



# MS Project for the Web Integration

## Project for the Web integration overview

This article explains the OnePlan and Project for the Web integration. To set up the integration, see [Set up the Project for the Web integration \[53\]](#).

### Introduction

With the OnePlan and Project for the Web integration, users are able to build out their project plans in Project for the Web, and bring that project plan into OnePlan to leverage advanced tools like resource plans, status reports, and much more.

<https://player.vimeo.com/video/557839899>

### Use cases

This integration has two main use cases for functionality:

- Create or Update plans from OnePlan as a Project in Project for the Web.
- Create or Update tasks from Project for the Web into OnePlan schedule.

For this integration, the project plan must be created in OnePlan FIRST. Then, from OnePlan, create a synced/mapped project in Project for the Web. The projects should not be created manually in Project for the Web.

## Set up the Project for the Web integration

This article explains how to set up the OnePlan and Project for the Web integration. For an overview on the integration, see [Project for the Web integration overview](#).


<https://player.vimeo.com/video/556928192>

## Get an integration key from OnePlan



### NOTE

You must have administration access to get an integration key from OnePlan.

1. Log into OnePlan.
2. Click the Settings icon  to access the Admin pages.
3. Go to **Integrations**.
4. In **Authentication Keys**, click **Add Key**. The **Add Key** form will open.
5. Enter a name for the new key in the **Key Name** field (e.g. "Project for the Web"). Click **Add** to generate a new key.

The screenshot shows the 'Add Key' form in the OnePlan Admin interface. The 'App Name' dropdown is set to 'Reporting'. The 'Key Name' field is empty. The 'Add' button is highlighted with a red box. A red arrow points from the 'Add Key' header to the 'Add' button. A note above the form says: 'After the key is created, be sure to copy and store in safe location. You will not be able to recover the key.'

6. Save the key name and generated key in a secure location (e.g. copy/paste into a [protected OneNote notebook](#)) for use in the OneConnect configuration.

App Name	Key
Reporting	*****
Project for the Web	cixXnP3D2UhJuwKcdjORZrW1zu77a6

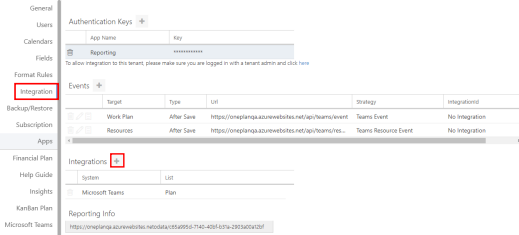


### NOTE

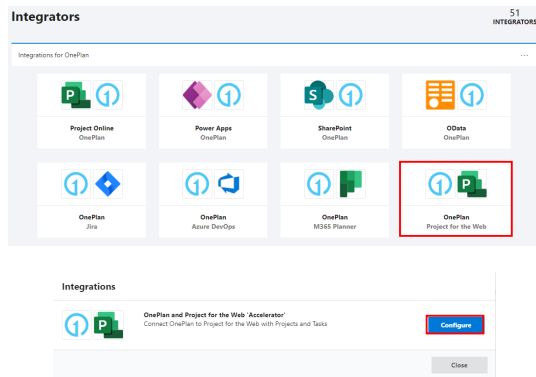
Once you navigate away from the OnePlan admin page, the new key is encrypted.

## Set up the integration in OneConnect

1. In **Integrations**, click **New External Integration**. You will be redirected to [my.oneconnect.ai](https://my.oneconnect.ai).



2. Under **Integrations for OnePlan**, select **OnePlan and Project for the Web 'Accelerator'**. Click **Configure**. The integration configuration settings will open.



3. Configure the OnePlan and Project for the Web integration.

- a. Complete the OnePlan configuration section.
  - **OnePlan Group Name:** Enter the name of the OnePlan group that you are connecting to.
  - **OnePlan Authentication Key:** Enter the OnePlan authentication key that has been generated from the OnePlan integration admin page.
  - **Integration Key Name:** Only use this when connecting to OnePlan OData, otherwise please leave it blank.



### NOTE

If you are using the US tenant ([my.oneplan.ai](https://my.oneplan.ai)) can skip Additional Options, Advanced Options, and Relay Options. These settings are not required to set up the integration.

If you are using the EU, CA, or AU tenant, you need to enter your tenant information into Additional Options.

- b. Click **Next**.




### NOTE

The Project for the Web section will open. You will skip the Integrators section. There is no set up required in the Integrators section.

- c. Complete the Project for the Web section.

- **Project for the Web URL:** Enter in the CDS (Common Data Service)/Dynamics URL.  
e.g. <https://orgfdcac62c.crm.dynamics.com/>


- **Username and Password:** Enter in username and password that will be used (Preferably a service account).



**NOTE**


The user needs to have admin access to the PowerApps environment you are connecting to, and Project for the Web licensing.

- **Client Id (Azure App Id):**  
**If you are a tenant admin:** Click [Click here to approve consent to use the default app registration for this tenant \(Admin Required\)](#).  
**Otherwise:** Follow [CDS \(Common Data Service\) / Dynamics Setup \[59\]](#). Then enter/paste the **Application (Client) ID** from CDS/Dynamics that you saved from the CDS/Dynamics Setup steps.



**NOTE**

The Client ID is not needed if the default app registration has been approved.

 Project for the Web
...

**Project for the Web URL**

**Username**

**Password**

**Client Id (Azure App Id) - Leave this blank if you have consented to use the default app registration**

[Click here to approve consent to use the default app registration for this tenant \(Admin Required\)](#)

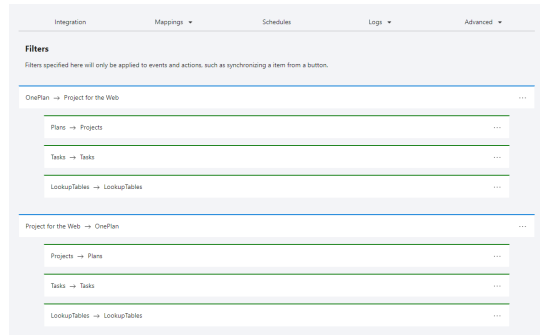
▶ Advanced Options

▶ Relay Options

Test
Next

- d. Click **Next**.




4. Set up filters and field mappings. A filter must be added to the OneConnect filters, to distinguish which projects in Project for the Web are to synchronize with OnePlan. Add a filter for only Projects that don't have a blank ID, in other words, don't include projects that don't have a mapped OnePlan plan. The ID fields referenced in the filter must also be mapped in the field mappings section.

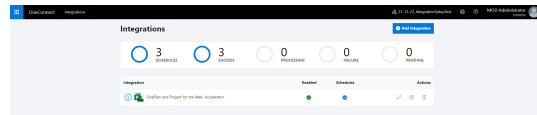


## Project for the Web integration settings

This article describes the integration settings for the OnePlan and Project for the Web integration.

See [Project for the Web integration overview \[53\]](#) for an overview of the integration and its uses. See [Set up the Project for the Web integration \[53\]](#) for instructions to set up the integration.

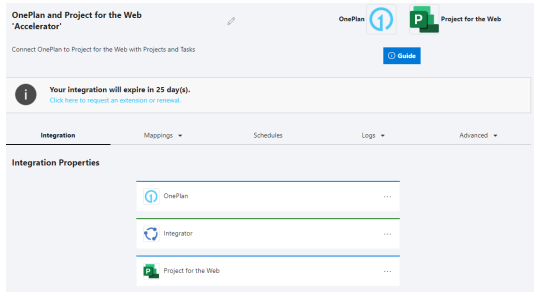
Go to [my.oneconnect.ai](https://my.oneconnect.ai). On the home screen lists all of your active integrations. Go to the desired integration. Click **Edit**  to edit the integration settings. Click **View Scheduled Jobs**  to view and edit scheduled jobs. Click **Delete**  to delete the integration.



## Edit the integration settings

### Integration Properties

Update the integration configuration properties that were set in [Set up the Project for the Web integration \[53\]](#).



**NOTE**  
The Tables mappings are not editable.

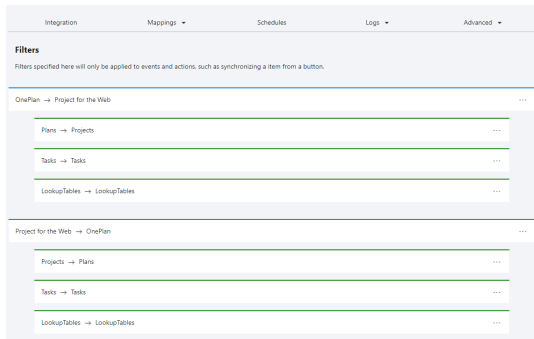
Table Mappings	
ID	Project for the Web
1	Plans
2	Tasks
3	LookupTables

## Mappings

Update mappings for the integration in the Mappings tab. In the Project for the Web integration, there are five mapping types:

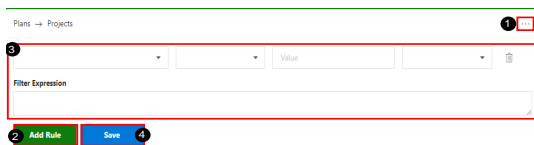
- Filters

**NOTE**  
These Filters only relate to Events, not Schedules.



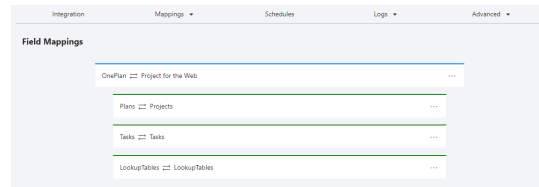
- To add a filter rule:

1. Select the desired mapping.
2. Click **Add Rule**.
3. Enter or create a filter expression.
4. Repeat steps 2-3 to add multiple filters to a mapping.
5. Click **Save**.



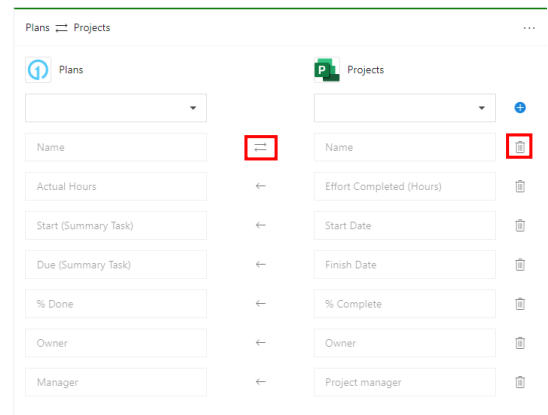
- Tables

- Fields



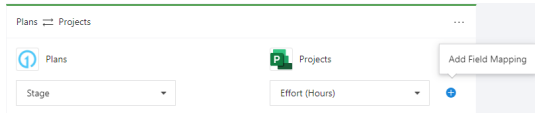
- To edit a mapping:

1. Select the desired field type mapping. The field mappings will open.
2. Click the direction arrow to change the direction of the mapping.
3. Click **Delete** to remove a mapping.

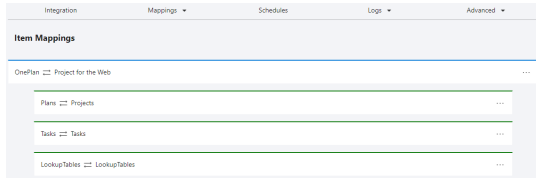


- To add a mapping:

1. Select the desired fields from both sides of the integration (e.g. both a OnePlan Plan field and a Project for the Web Project field).
2. Click **Add Field Mapping**. The new mapping will appear at the bottom of the mappings list.

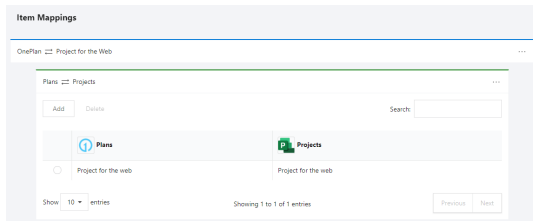


• Items

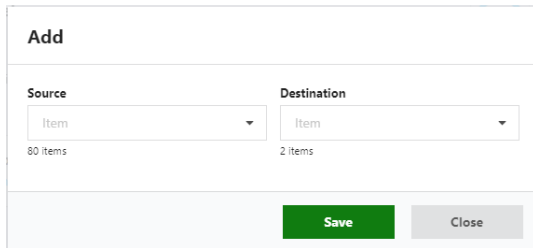


• To add item mappings:

1. Select the desired field type mapping. The item mappings will open.
2. Click Add. The Add form will open.

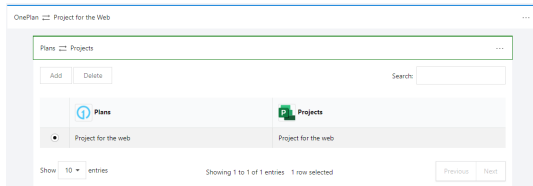


3. Select a an item from both the **Source** and **Destination** drop downs.
4. Click **Save**.

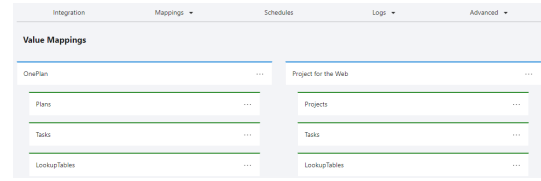


• To delete item mappings:

1. Select the desired field type mapping. The item mappings will open.
2. Select an item mapping.
3. Click **Delete**.

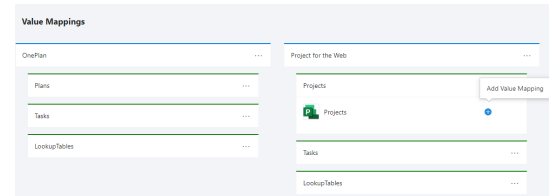


• Values



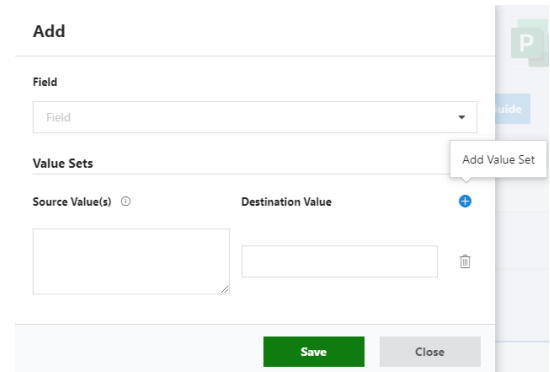
• To add value mappings:

1. Click on the desired field type. The value mappings will open.
2. Click **Add Value Mapping**. The **Add** form will open.



3. Complete the **Add** form:

- **Field:** Select a field from the drop down menu.
- **Source Value(s):** Enter the source values, separated by a comma.
- **Destination Value:** Enter the destination value.
- Click **Add Value Set** to add additional source and destination value fields.



4. Click **Save**.

**Default field mappings**

Plans (OnePlan) <--> Projects (Project for the Web)

**Table 1. Plans <--> Projects default field mappings**

OnePlan field	Project for the Web field	Direction
Name	Name	Both

OnePlan field	Project for the Web field	Direction
Effort	Effort	Both

Tasks (OnePlan) <--> Tasks (Project for the Web)

**Table 2. Tasks <--> Tasks default field mappings**

OnePlan field	Project for the Web field	Direction
Name	Project Task Name	Both
Effort	Effort	Both
Assigned To	Assigned To	Both

## Schedules

To manually execute a scheduled job, click **Execute**.

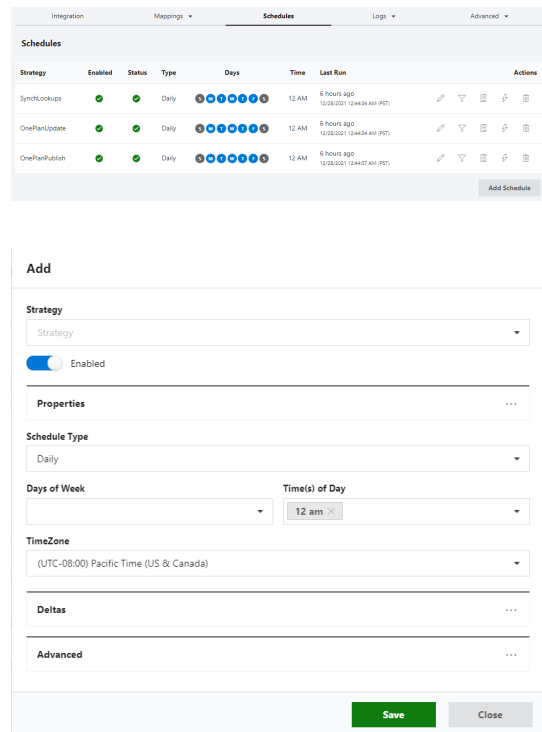
To delete a scheduled job, click **Delete**.

### Add a new scheduled job

1. Click **Add Schedule**. The **Add schedule** form will open.
2. Complete the **Add schedule** form.
  - **Strategy**:
  - **Enabled**: When the Enabled switch is to the right (on), the job will run on the set schedule.
  - **Schedule Type**: Select the type of schedule. Options include Daily, Monthly, and Hourly.
  - **Day(s) of Week**: Select the day(s) of the week for the job to run.
  - **Time(s) of Day**: Select the time(s) of day for the job to run.
  - **TimeZone**: Select the timezone for the schedule to be based on.
  - **Delta Type**: Options include **Incremental** or **Full**.
  - **Delta Range**: Options include **Last Run, Day, Week, Month, Custom, Hours, Days, Weeks, Months**.
  - **Automatic Retry**: Currently only available for schedules that are set to run Daily or Monthly with only one Time(s) of Day specified. This setting is ignored if the strategy uses the Schedule operation. E.g. queues up multiple items to sync. If a schedule fails 5 consecutive times during a 24 hour period, this setting is reset to false. As there may be a problem that requires investigation to resolve. Once the issue has

been resolved, this setting can be manually set back to true.

3. Click **Save**.



### Edit a scheduled job

1. Click **Edit Schedule** next to the desired job. The schedule settings form will open.
2. Update the schedule settings form. See the [Add schedule form](#) for settings details.
3. Click **Save**.

### Configure job filters

1. Click **Configure Filter** next to the desired job. The filter settings form will open.
2. Edit the filter settings as desired.
3. Click **Save**.

### Default scheduled jobs

The following scheduled jobs are installed by default:

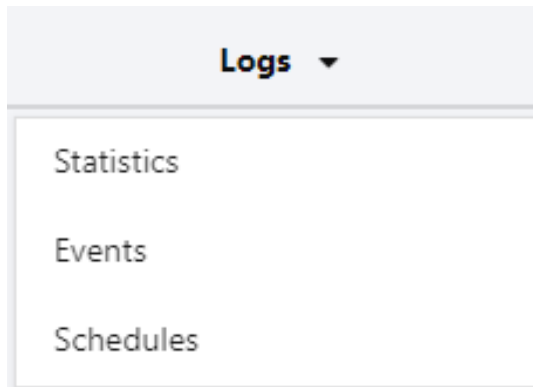
- **SynchLookups**  
Synchronize any mapped lookup/options set fields' choices from Dynamics into OnePlan.
- **OnePlanUpdate**  
Synchronize projects and tasks from Project for the Web to OnePlan.

- **OnePlanPublish**  
Synchronize OnePlan plans into Project for the Web as projects

## Logs

View the activity logs for the integration.

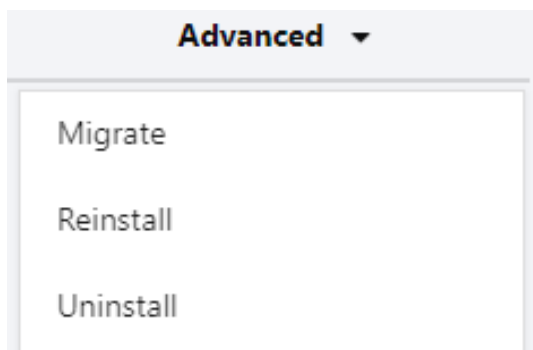
- **Statistics:** A log of integration data collected over the past five days.
- **Events:** A log of all transactions not tied to a schedule. E.g. transactions that were triggered via action button.
- **Schedules:** A log of all transactions tied to a schedule.



## Advanced

Move, install, or uninstall the current integration into or between OnePlan groups.

- **Migrate:** Migrate the integration into another OnePlan group.
- **Reinstall:** Reinstall the integration into your current OnePlan group.
- **Uninstall:** Uninstall the integration from your current OnePlan group.



## CDS (Common Data Service) / Dynamics Setup



### NOTE

In order to do the CDS (Common Data Service)/Dynamics setup, you need to have an admin account.



### NOTE

The service account used for integration must have the 'System administrator' or 'System Customizer' role in Dynamics 365.

Make sure that an Admin account can grant the admin consent for the API permission. Once it is granted, the API permissions should each have the status **Granted for [organization name]**.

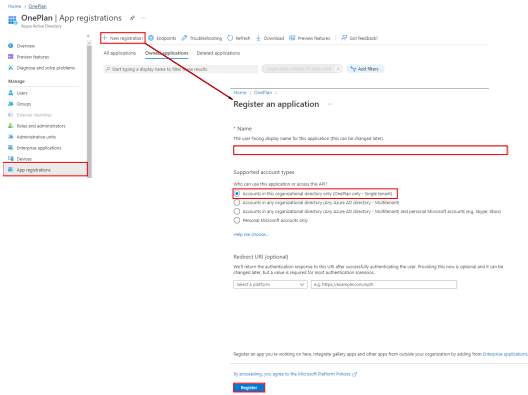
1. Go to <https://portal.azure.com>. An Admin account is required to approve API access.
2. On the top left corner, expand the portal menu navigation and select **Azure Active Directory**
3. On the left navigation, select **App Registrations**
4. Click **New Registration**. The **Register an application** form will open.
5. Enter a name for the application in the **Name** field.



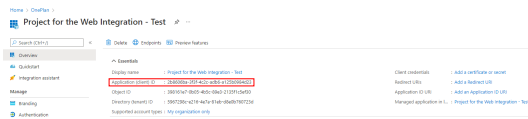
### NOTE

This is the user-facing display name for this application, and can be changed at any time.

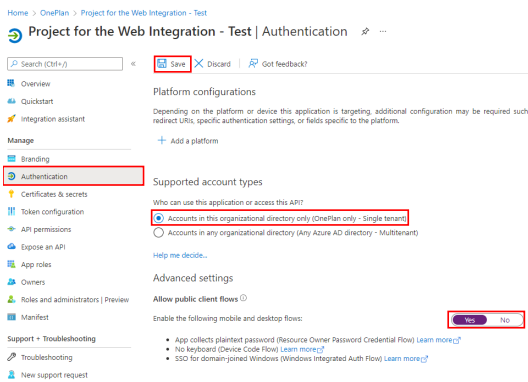
6. Click **Register**. Once registered, you will be directed to the recently created App configuration home page.



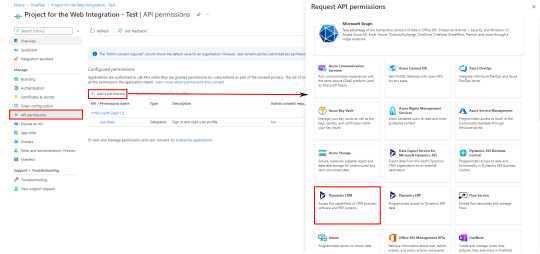
7. Save the **Application (client) ID** (e.g. copy/paste into a notepad doc) for use in the OneConnect configuration.



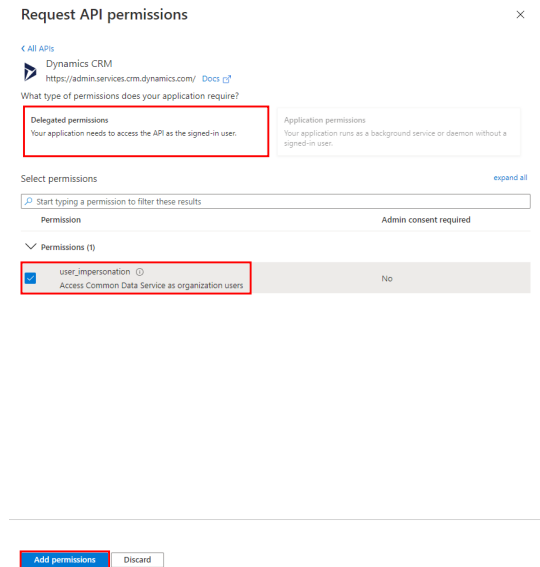
8. On the left navigation, go to **Manage > Authentication**.
9. Update the Authentication settings.
  - **Supported account types:** select **Accounts in this organizational directory only**.
  - **Advanced Settings:** set **Allow Public Client Flows** to **Yes**.
10. Click **Save** to save the changes.



11. On the left navigation, go to **Manage > API Permissions**.
12. Click **Add a permission**. The **Request API permissions** form will open.
13. Select **Dynamics CRM**.



14. Configure the Dynamics CRM API permissions settings.
  - **What type of permissions does your application require?:** Select **Delegated permissions**.
  - **Select permissions:** check the checkbox for **user\_impersonation**.
15. Click **Add permissions**.





# Project for the Web Accelerator Integration

## Project for the Web Accelerator Integration - Pre-Integration Setup

This article explains how to set up an integration between OnePlan and Project for the Web (P4W) using the Accelerator. The Accelerator applies useful customizations to the Project for the Web Power App.

The integration focuses on streamlining data between OnePlan and Project for the Web.

### Files

**OnePlan Backup:** OnePlan(!Power Apps Accelerator Project Template)2022\_09\_15.backup

**OnePlan Accelerator:**  
OnePlanProjectAccelerator\_21\_0\_0\_15.zip

### Licenses

**Accelerator + Project for the Web:** Project Plan 1

**Accelerator + Project for the Web + Power BI:** M365 / Project Plan 1 & Power BI

## OnePlan Pre-Integration Setup

### Create a Blank OnePlan Group

1. Log into [my.oneplan.ai/home/newgroup](https://my.oneplan.ai/home/newgroup).
2. Give the group a Name.
3. Click **Create Group**. This will create a new completely blank OnePlan group.
4. Once the group has been made, contact OnePlan to enable Advanced settings in the OnePlan configuration.

### Import Backup into OnePlan

1. In the OnePlan Configuration, navigate to **Backup / Restore**.
2. Click **Import Backup**.
3. Check the **Include Content** box.
4. Select **Browse** to locate the backup.
5. Select the **OnePlan(!Power Apps Accelerator Project Template)2022\_09\_15.backup** file.

6. Select **Restore**.

### Set Up Timesheet Periods

1. In the OnePlan Config, navigate to **Time Plan**.
2. Click on the **+** next to **Periods**.
3. Select **Bulk Periods**.
4. Choose a **Start date** for your periods to begin on.
5. Pick how many **days are assigned in a period**.
6. Pick the **number of periods** to be made in bulk.
7. Click **Add**.

## Power Apps Pre-Integration Setup Project for the Web Accelerator

1. Log into [make.powerapps.com](https://make.powerapps.com).
2. On the Top right of the page, click on the environment that has Project for the Web.
3. Expand the **Navigation Menu** on the left (three horizontal lines), click on **Solutions**.
4. You should see a few Display Names with the name of **Project** and variations of the name with **msdyn\_ProjectServiceCore**.
5. At the top of the page, click on **Import Solution**.
6. Click Browse to locate **Project\_for\_the\_Web\_Accelerator\_1\_7\_0\_5.zip**.
7. Click **Next**.
8. Click **Next**.
9. Expand the **Select a connection** dropdown and click on **+ New Connection**. This will bring the Microsoft Dataverse window appear asking for consent of use.
10. Click **Create**.
11. Login using **Mod Administrator** credentials.
12. Return to the **Import a Solution** page and click on **Refresh**. The connection information will be filled in.
13. Click **Import**. This will take a few minutes to import.

### OnePlan Project Accelerator

1. Click **Import Solution**.
2. Click **Browse** to locate the **OnePlanProjectAccelerator\_21\_0\_0\_15.zip**.
3. Click **Next**.
4. Click **Import**. Wait until solution successfully imports.
5. Once both Accelerators are imported into the new environment, click on **Publish All Customizations**.

## Modify OnePlan Project Accelerator

### Remote the Extra Financials Tab

1. In [make.powerapps.com](https://make.powerapps.com), click on **Solutions**.
2. Click on **OnePlan Project Accelerator**. A new page will load.
3. Make sure that in the far-left panel, the **Objects** section is highlighted.
4. In the **Objects** panel, expand **Tables**, expand **Project**, click on **Forms**.
5. Click on **Information**. The **Forms Template** page will load.
6. Click on the ellipses and select **Switch to Classic**. A new tab will load with the classic editor.
7. Click **Ok**.
8. In the top left corner of the page, there is the Quick Launch that shows all the sections of the OnePlan Accelerator.



### IMPORTANT

Notice there are two **Financials** tabs:

- The top Financials tab, when clicked, will have the words **Solution: OnePlan Project Accelerator**, and **Form: Project**. Beneath the words are two boxes: **Financials > Section > oneplan\_FinancialPlanner**. This is the Financials tab to keep.
- The second Financials tab will only have the **OnePlan Project Accelerator**, and **Form: Project** words (*no boxes underneath*). This is the Financials tab that must be deleted.

9. Click on the second **Financials** tab.
10. Click **Remove**. An alert will appear confirming the deletion.
11. Click **Ok**.
12. Click **Save**.
13. Click **Publish**. A yellow box will appear with the word **Publishing Customizations** in the middle.
14. Return to the previous browser tab that shows the **Forms Template**, in the top right of the page, click **Publish**.

## Update code for Timesheets

### Change the URL in the Code Snippet

```
<html><head>
  <script src="https://ajax.googleapis.com/ajax/
  <script src="ClientGlobalContext.js.aspx" type
  <meta><meta><meta><meta><meta><meta><meta><met

<body style="word-wrap: break-word;"onfocusout

  <iframe id="iframe" allowfullscreen="true"
  </iframe>
  <script language="javascript">
  debugger;
    var IntegrationId;
    var EventManagerUrl = "https://service
```

```

var ConfigId ;
var currentUrl = parent.window.XMLHttpRequest().url;
var settings = {
  "async":true,
  "crossDomain":true,
  "url": EventManagerUrl + "/GetIntegrationsForSite?siteid=" + currentUrl + "
  "headers":{
    "cache-control":"no-cache",
    "postman-token":"971b5492-1473-90fb-be27-f60a623f4425"
  }
}
debugger;
$.ajax(settings).done(function(response){
  debugger;
  if(response.length > 0) {
    //*****
    IntegrationId=response.GetIntegrationId();
    GetConfig();
  }
  else {
    alert("This site has not been configured for integrations.");
  }
});

function GetConfig()
{
  var settings = {
    "async": true,
    "crossDomain": true,
    "url": EventManagerUrl + "/GetButtonUrl?IntegrationId=" + IntegrationId,
    "method": "GET",
    "headers":{
      "cache-control": "no-cache"
    }
  }
  $.ajax(settings).done(function(data) {
    var reg = new RegExp("http://www\\.oneplan\\.ai/");
    var queryString = reg.exec(data.url)[1];
    ConfigId = queryString;
    document.getElementById("url").value = "https://my.oneplan.ai?ConfigId=" + ConfigId;
  });
}
</script>
</body></html>

```

1. Log into OnePlan.
2. Click on the user icon on the top right of the page.
3. Click **Share With**.

4. Copy the Shareable URL (e.g. <https://my.oneplan.ai?ConfigId=2ca864fc-XXXX-XXXX-XXXX-1ec2281bXXXX&AppId=64a1b4e5-XXXX-XXXX-XXXX-71b7e7dcXXXX>)
5. Replace the bolded code with the Shareable URL
6. **Replace Code Snippet for Timesheets**
1. Copy the modified code snippet above.
2. Go to [make.powerapps.com](https://make.powerapps.com).
3. Click **Solutions**.
4. Click on **OnePlan Project Accelerator**.
5. Ensure the **Objects** tab is selected in the far-left column.
6. **Expand Web Resources**. back to 0 \$
7. **Click Code**.
8. Locate **OnePlan Timesheet**, click on the 3 vertical dots.
9. Expand the **Edit** options, select **Edit in Classic**. A new tab will load with the classic editor.
10. Locate and click the **Text Editor** button. A new window will appear.
11. Click on the **Source** tab.
12. Delete the code in this tab.
13. Replace code with the modified snippet from above.
14. Click **Ok**.
15. Click **Save**.
16. Click **Publish**. A yellow window will appear.
17. Return to previous tab and click **Done**.

### Project for the Web Accelerator Integration - Integration Setup

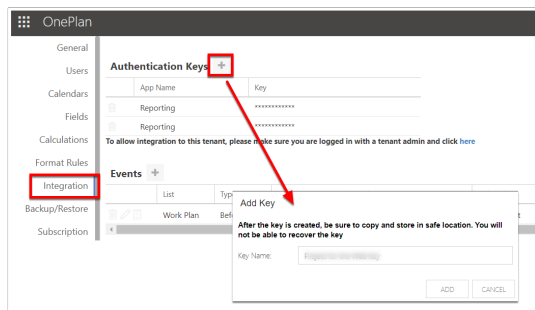
This article explains how to set up an integration between OnePlan and Project for the Web (P4W) using the Accelerator. The Accelerator applies useful customizations to the Project for the Web Power App.

The integration focuses on streamlining data between OnePlan and Project for the Web.

## OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



## OneConnect Setup

To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.
2. Navigate to OnePlan and Project for the Web 'Accelerator'. Click the **Configure** button. The configuration form will open.



3. Complete the configuration form.
  - a. Complete the OnePlan section.
    - **App Name:** Enter the OnePlan Group name you will be integrating into.
    - **Key:** Enter the OnePlan Authentication Key generated from OnePlan.

- **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.



### NOTE

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>

- b. Click **Next**.
- c. Complete the Project for the Web section.
  - **Project for the Web URL:** Enter the Project for the web URL (*https://<Organization>.crm.dynamics.com/*).
  - **Username:** Enter the email address that will be used for this integration.
  - **Password:** Enter the password associated with the username above.
  - **Click Here to approve consent to use the default app registration for this tenant.** Sign in using admin privileges to grant access.
- d. Click **Next**.

# Project for the Web Accelerator Integration - Default Field Mappings and Scheduled Strategies

This article describes the default field mappings and scheduled strategies that are set up when the Project for the Web Accelerator integration is installed.

## Default Field Mappings

### Plans - Projects

OnePlan Fields	Project Fields	Direction	Notes
Name	Name	Both	Required
Timesheet Hours	Effort Completed (Hours)	Project to OnePlan	
Start (Summary Task)	Start Date	Project to OnePlan	
Due (Summary Task)	Finish Date	Project to OnePlan	
% Complete	% Complete	Project to OnePlan	
Owner	Owner	Project to OnePlan	
Manager	Project Manager	Project to OnePlan	
Forecast	Forecast	OnePlan to Project	
Actual Cost	Actual Cost	OnePlan to Project	
Budget	Budget	OnePlan to Project	
Benefits	Benefits	OnePlan to Project	
Strategic Alignment	Strategic Alignment (ID)	Project to OnePlan	
Needs Staffing	Needs Staffing	Project to OnePlan	
Business Unit	Business Unit (ID)	Project to OnePlan	
Effort Health	Effort Health (ID)	Project to OnePlan	
Financial Health	Financial Health (ID)	Project to OnePlan	
Funding Source	Funding Source (ID)	Project to OnePlan	

OnePlan Fields	Project Fields	Direction	Notes
Improve Employee Retention	Improve Employee Retention (ID)	Project to OnePlan	
Priority	Priority (ID)	Project to OnePlan	
Issue Health	Issue Health (ID)	Project to OnePlan	
Lower Cost	Lower Cost (ID)	Project to OnePlan	
Overall Health	Overall Health (ID)	Project to OnePlan	
Project Type	Project Type (ID)	Project to OnePlan	
Risk	Risk (ID)	Project to OnePlan	
Stage	Stage (ID)	Project to OnePlan	
State	State (ID)	Project to OnePlan	
Timesheet Charge	Timesheet Charge (ID)	Project to OnePlan	(Recommended, Temporary) Remove this field mapping
Timesheet Type	Timesheet Type (ID)	Project to OnePlan	(Recommended, Temporary) Remove this field mapping
Schedule Health	Schedule Health	Project to OnePlan	

### Tasks - Tasks

OnePlan Fields	Project Fields	Direction	Notes
Name	Name	Both	Required
Assigned To	Assigned To	Project to OnePlan	
Effort	Effort	Project to OnePlan	
Start	Start	Project to OnePlan	
Timesheet Hours (Actual Hours)	Effort Completed (Hours)	OnePlan to Project	
Due	Finish	Project to OnePlan	
% Complete	% Complete	Project to OnePlan	
Task Dependencies	Task Dependencies (PFTW)	Project to OnePlan	
Task Order (OnePlan System)	Display Sequence	Project to OnePlan	

## Lookup Tables - Lookup Tables

OnePlan Fields	Project Fields	Direction	Notes
Improve Employee Retention (Plan)	Improve Employee Retention (Project)	Project to OnePlan	
Lower Cost (Plan)	Lower Cost (Project)	Project to OnePlan	
Business Unit (Plan)	Business Unit (Project Task)	Project to OnePlan	
Priority (Plan)	Priority (Project)	Project to OnePlan	
Financial Health (Plan)	Financial Health (Project)	Project to OnePlan	
Effort Health (Plan)	Effort Health (Project)	Project to OnePlan	
Schedule Health (Plan)	Schedule Health (Project)	Project to OnePlan	
Issue Health (Plan)	Issue Health (Project)	Project to OnePlan	
Funding Source (Plan)	Funding Source (Project)	Project to OnePlan	
Project Type (Plan)	Project Type (Project)	Project to OnePlan	
Timesheet Charge (Plan)	Timesheet Charge (Project)	Project to OnePlan	(Recommended, Temporary) Remove this field mapping
Timesheet Type (Plan)	Timesheet Type (Project)	Project to OnePlan	(Recommended, Temporary) Remove this field mapping
Stage (Plan)	Stage (Plan)	Project to OnePlan	
Overall Health (Plan)	Overall Health (Project)	Project to OnePlan	
Risk (Plan)	Risk (Project)	Project to OnePlan	

## Default Scheduled Jobs

**SynchLookups:** This strategy will synchronize the choice value options in Project for the Web into the corresponding Choice field options mapped in OnePlan.

**OnePlanUpdate:** Publishes data from Project for the Web into OnePlan.

**OnePlanPublish:** Publishes data from OnePlan into Project for the Web.

## Project for the Web Accelerator Integration - Add Power BI to the Accelerator

A Power BI template can be deployed alongside the Accelerator. Deploy the Power BI template after the OnePlan Accelerator.

### Prerequisites

- An environment with Project for the web and the Project Accelerator in it.
- Admin rights to the environment.
- The appropriate privileges to deploy the Power BI content pack to powerbi.com.

### Deploy the Power BI Template

1. Download the Power BI template for the Accelerator.
2. Deploy it using Power BI Desktop or in the [PowerBI.com](https://powerbi.com) service.
3. When prompted for the environment URL, use the base URL of your environment. For example: *https://myenvironment.crm.dynamics.com*.



### IMPORTANT

When you deploy the report, ensure that your team will have access to it. [Learn more about sharing in Power BI.](#)

## Modify the Project Accelerator

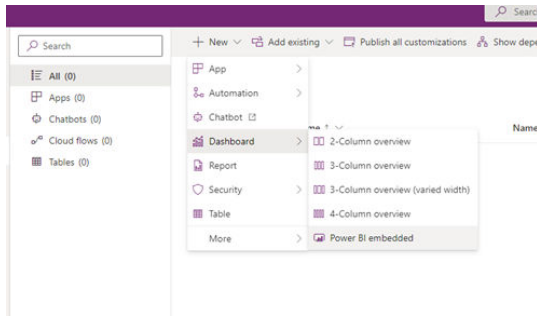
### Prerequisites

1. Power BI report has been deployed to PowerBI.com.
2. A customized solution has been created to include the changes. To create a solution please review [Create a solution](#).

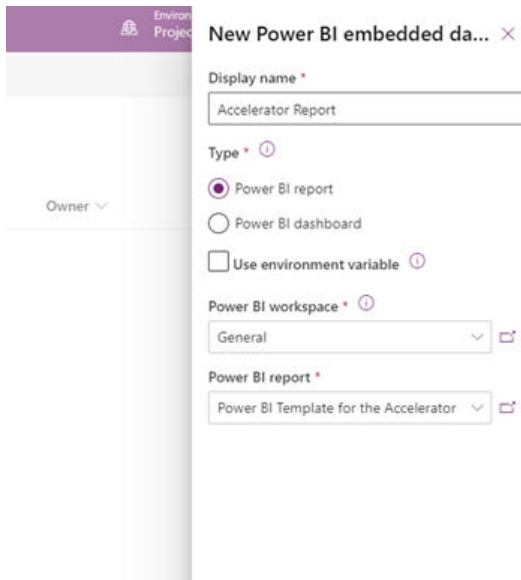
The Report menu currently points at a web resource file containing HTML with instructions on how to get the Power BI Template with the Accelerator. Since the Accelerator is managed, the web resource cannot be edited. There are two options to have the report bring up the Power BI report:

### Updating the report menu via Power BI embedded report

1. Sign into [powerapps.com](https://powerapps.com).
2. Select the environment containing the Accelerator.
3. Select solutions > the customized solution > **Edit**.
4. Select the **Objects** option.
5. **New > Dashboard > Power BI embedded**.

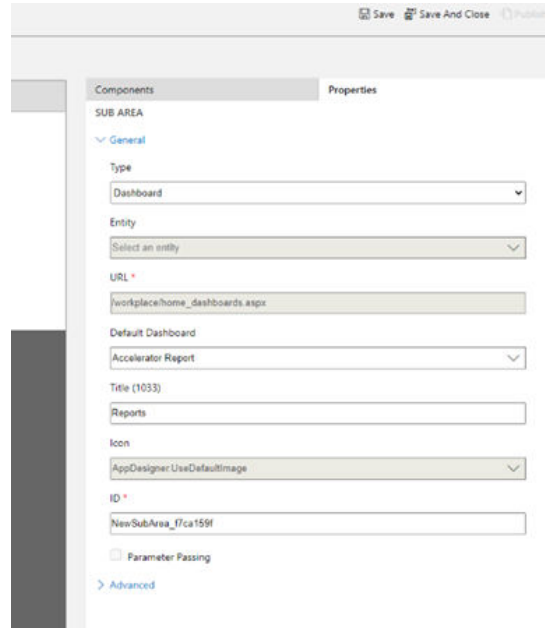


6. Give the report a name and choose the workspace/report and save.

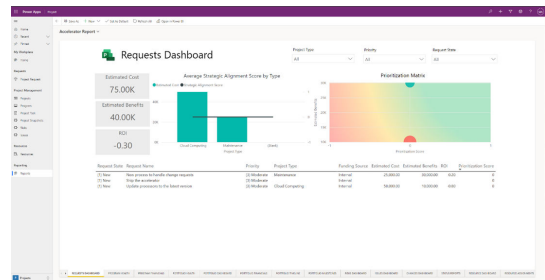


7. If not already added, add the site map to the custom solution.

- a. **Add existing > more > Site Map**.
- b. Choose **Project – msdyn\_ProjectServiceCore**.
- c. Click **Add**.
8. Select the site map and click **Edit**.
9. Select the **Reports** option under **Reporting**.
  - a. **Select Type = Dashboard**.
  - b. **Default Dashboard =** choose the report from the drop down.
  - c. Click **Save and close**.



10. Click **Publish**.
11. Go back to the Project app and click **Report**.
12. The report will now show up along other reports in the environment.

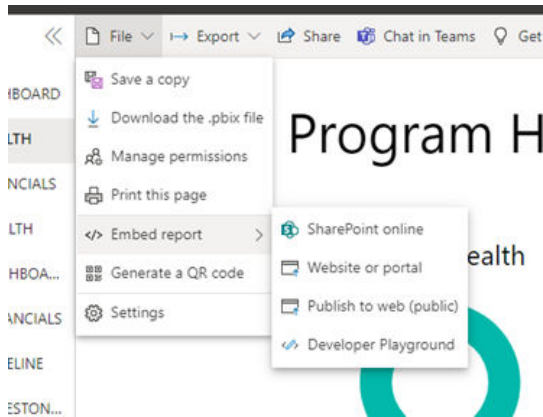




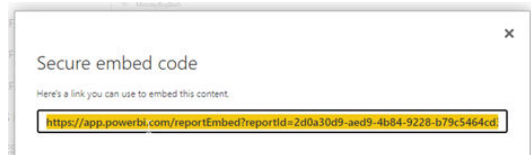
## Updating the Report Menu via Web Resource (full frame)

The Accelerator already contains a placeholder for the Power BI template. Once you've deployed the Accelerator and the Power BI template, follow these steps to have the Power BI report appear in the Accelerator.

1. Once you have deployed the Power BI template, open the report in [PowerBI.com](#).
2. Select the file > **Embed Report** > **Website or portal**.



3. Copy the link in the top box ("Here's a link you can use to embed content") and keep it handy.



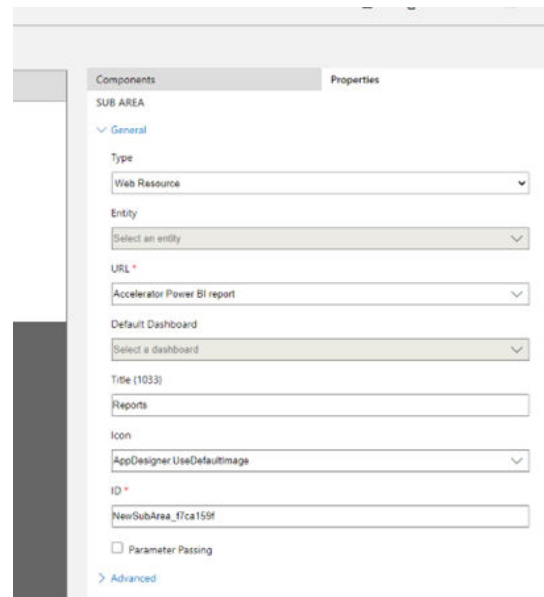
4. Sign into [Power Apps](#).
5. Select the environment containing the Accelerator.
6. Select **Solutions** > the customized solution > **Edit**.
7. Select the **Objects** option.
8. **New** > more > **Web resource**.
9. Set the fields as follows:
  - **Display Name:** Accelerator Power BI report
  - **Name:** Accelerator\_report
  - **Type:** Webpage HTML
10. Create a new html file to upload with the follow text. Update the "REPLACE THIS" with the embedded string copied in step 3.

```
<html>
  <head>
```

```
</head>
<body onfocusout="parent.setEmailRange();"
  <iframe width="100%" height="100%" src="
</body>
```

```
</html>
```

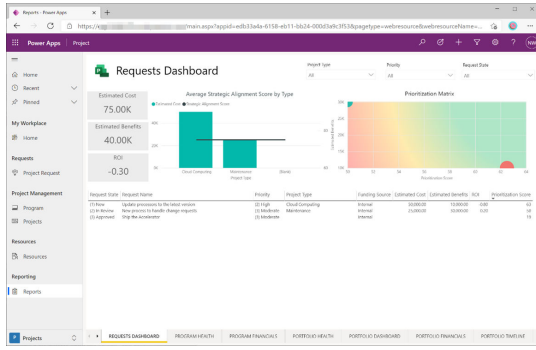
11. Press **Ok** to save the changes and close the dialog.
12. If not already added, add the site map to the custom solution.
  - a. **Add existing** > more > **Site Map**.
  - b. **Choose Project** – **msdyn\_ProjectServiceCore**
  - c. Click **Add**.
13. Select the site map and click **Edit**.
14. Select the **Reports** option under **Reporting**.
  - a. **Select Type = Web Resource**.
  - b. **URL = Accelerator Power BI report**.
  - c. Click **Save and close**.



15. Click **Publish**.
16. Go back to the Project app and click **Report**.
17. The report will now show up taking up the entire section.



# Integrations



# MS Project Desktop Integration

## How do I set up Project Desktop for OnePlan?

This article explains how to configure your OnePlan group for Microsoft Project Professional/Desktop. When users publish their MS Project schedules to OnePlan, data is mapped between the two tools according to the Field Mappings. This requires the Project Professional app be installed.

Go to the Admin pages, select Project Professional in the navigation.

### Admin Settings

When the Project Professional app is installed in OnePlan, some fields may already be mapped. You may add more mappings or delete mappings as needed.

Fields		
Field Mapping +		
Microsoft Project Field	OnePlan Field	Direction
Start	Start	Both
Finish	Due	Both
Cost	Estimated Cost	MS Project to OnePlan
% Complete	% Done	Both
Actual Start	Actual Start	Both
Actual Finish	Actual Finish	Both
Remaining Cost	Remaining Cost	MS Project to OnePlan
Remaining Work	Remaining Effort	MS Project to OnePlan
Actual Cost	Actual Cost	MS Project to OnePlan

### Add Mapping

Click the [+] icon to add another field mapping. Complete the mapping form. When project schedules are published to OnePlan, they are mostly read-only. Yet, team members can update the status of their work via the My Work page, and then the Project Manager can pull the updates back into their MS Project schedule.

- **Microsoft Project Field:** Select a field.
- **OnePlan Field:** Select a task-level field. If needed, you may add more task-level fields on the Fields settings ([Create and edit fields](#)).
- **Direction:** Select which direction the data maps - either MS Project to OnePlan, OnePlan to MS Project, or Both.

Add Mapping ✕

Microsoft Project Field:

OnePlan Field:

Direction:

### User Setup

Each project manager who will build and/or manage their project schedule in MS Project needs to install the OnePlan to Project Connector on their local machine.

Here are the instructions: [Install the Project Connector \[70\]](#)

## Install the OnePlan for Project Connector

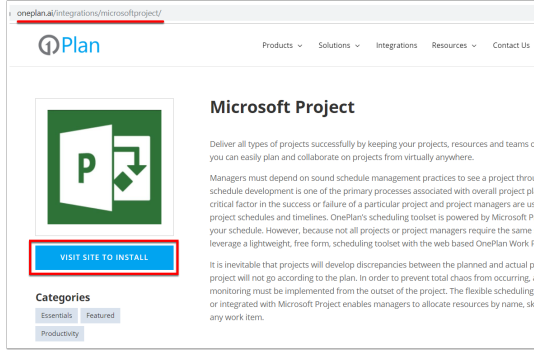
This article explains how to install the OnePlan for Project Connector between OnePlan and Microsoft Project. The OnePlan for Project Connector tools allows project managers to build and manage their project schedules in the MS Project Desktop, and then sync the project schedule to OnePlan.

You must have Microsoft Project Desktop installed locally on your machine to use the OnePlan for Project Connector. Have Microsoft Project installed prior to installing the OnePlan connector.

### Install OnePlan for Project Connector Tool

Navigate to the OnePlan Integration page for Microsoft Project: <https://oneplan.ai/integrations/microsoftproject/>.

Click the blue button to install the connector.

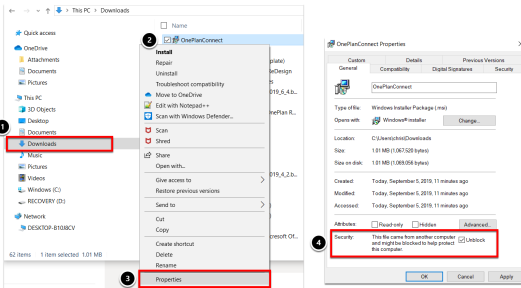


### Save the Download File

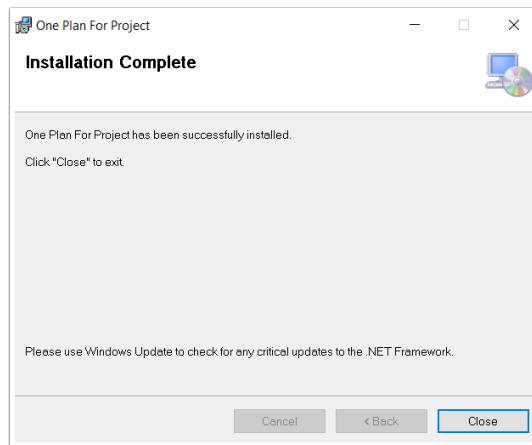
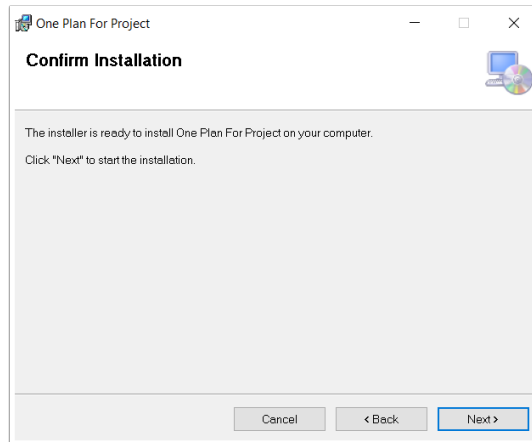
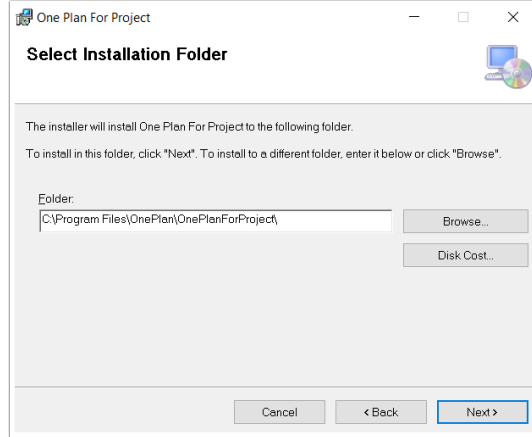
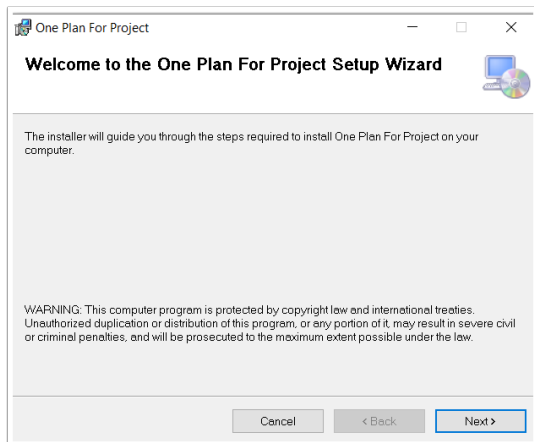
If prompted, click **Save**. Do not click Run. Instead, go to your Downloads folder (or wherever you may have saved it).

### Unblock Download File

You may be prompted that the download file is blocked. Open the properties for the download file. On the general tab, select the check box for **Unblock**.

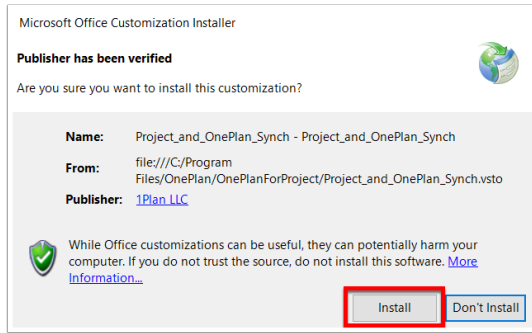


### Run Installer Setup Wizard



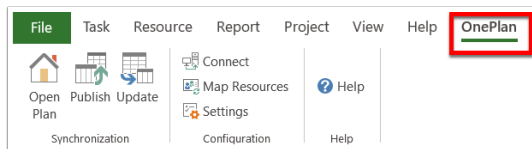
## Open Microsoft Project

After the installation is complete, open Microsoft Project. The first time you open MS Project, you will be prompted to confirm installation of the connector add-in. You may start with a blank schedule & build it out, or begin with an existing schedule/template. Click **Install**.



## OnePlan Menu in Microsoft Project

Once installed, the OnePlan Connector will show the OnePlan menu.

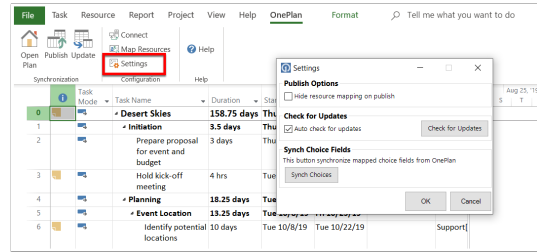


## OnePlan Connector Settings

**Hide Resource Mapping on Publish:** Select the check box to skip the resource mapping on publish. Users would instead click the Map Resources button on the ribbon prior to publishing.

**Check for Updates:** Select the check box to auto-check for updates each time you open MS Project. You may also manually check for updates if you leave that option unchecked.

**Synch Choice Fields:** Click this button to synch the choice options for fields mapped between OnePlan and MS Project.



## OnePlan Help

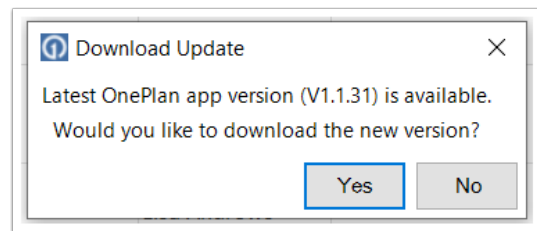
The OnePlan Help menu directs the user to the OnePlan online guide.



Follow to the article [How to Use the OnePlan for Project Connector](#) for how to connect your plan and project schedule. [Use the OnePlan for Project Connector](#)

## Updates

If you have the Check for Updates box checked, when a new version is available, you will be prompted to download the latest version.



## Use the OnePlan for Project Connector

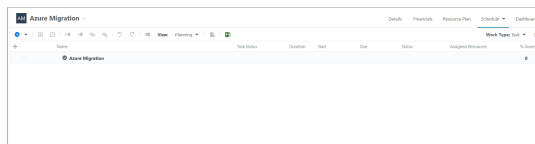
This article explains how to use the OnePlan for Project Connector between OnePlan and Microsoft Project. The OnePlan for Project Connector tools allows project managers to build and manage their project schedules in the MS Project Desktop, and then, sync the project schedule to their Plan in OnePlan.

From within OnePlan, users can see resource load across all projects, dive into project schedule details, view the Gantt, timeline, critical path, etc. Also, users can do additional collaboration (even task-level). Users can also view & work with the tasks in a KanBan board.

You must have both Microsoft Project Desktop and the OnePlan for Project Connector installed locally on your machine to use the OnePlan for Project Connector. The Project Professional app must also be installed in OnePlan by your admin.

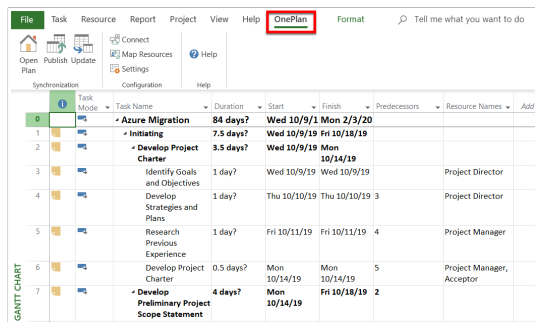
### New Plan without a Schedule of Tasks

Typically, you will already have a plan with details, but not yet a schedule. Navigate to the Schedule Grid page for your plan. If you don't yet have a plan in OnePlan, create it. Later, when publishing from Microsoft Project, you'll be prompted to select your plan.



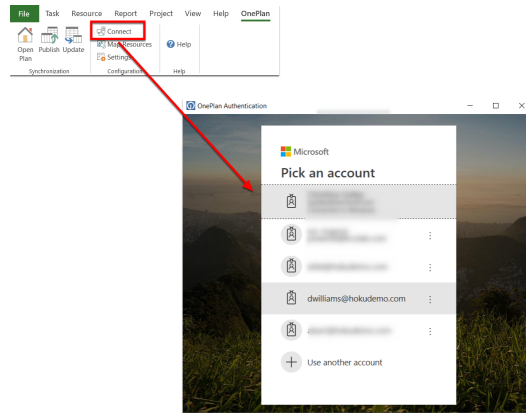
### Open Microsoft Project

Build your task schedule. When ready to publish, open the **OnePlan** menu.



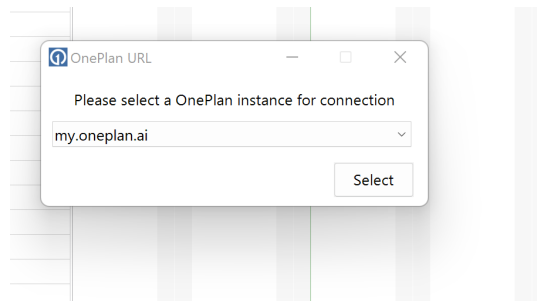
### Connect to OnePlan Group and Plan

Click **Connect**. *Authenticate to your Office365 account.*

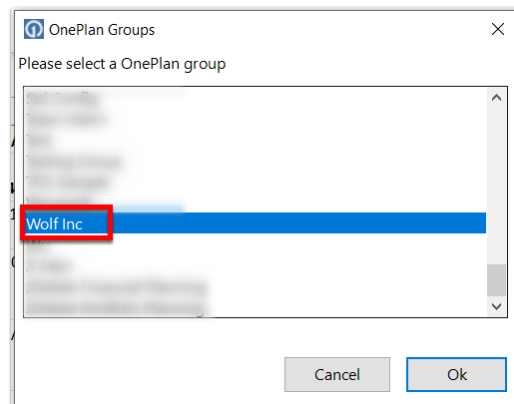


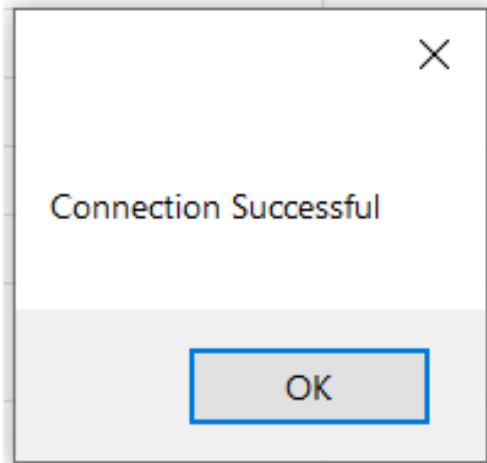
### Select OnePlan Instance and Group

You may have access to multiple OnePlan instances and/or groups. If so, first select your OnePlan instance.



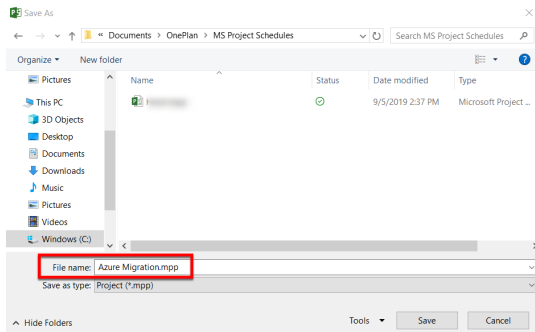
Then select your OnePlan group,





### Save Plan

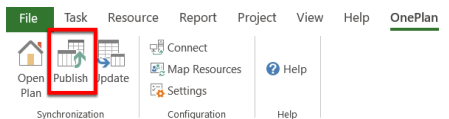
Save your project schedule as the same name of its corresponding plan in OnePlan.



### Publish Project Schedule to OnePlan

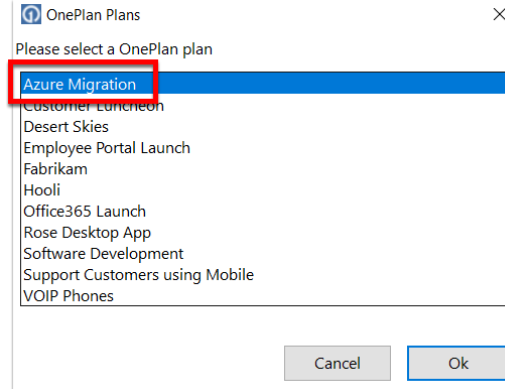
Now that your Project file is connected to OnePlan, it's time to publish this schedule to OnePlan.

Click **Publish**.



### Select Plan

The connector looks for the existing plans in your OnePlan group. Select your plan.



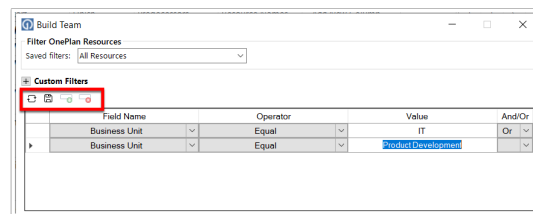
### Map Resources / Build Team

You may map resources before publishing, by selecting Map Resources in the OnePlan menu. Or, you may wait to be prompted to map resources during the publish process.

### Custom Filters for Mapping Resources

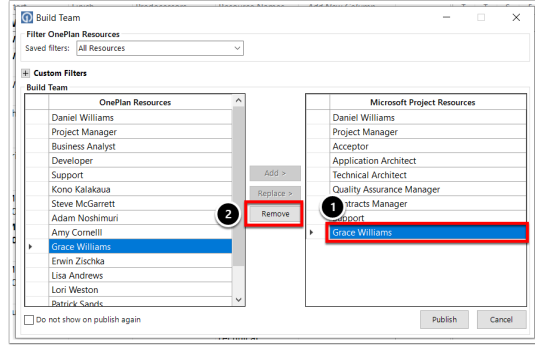
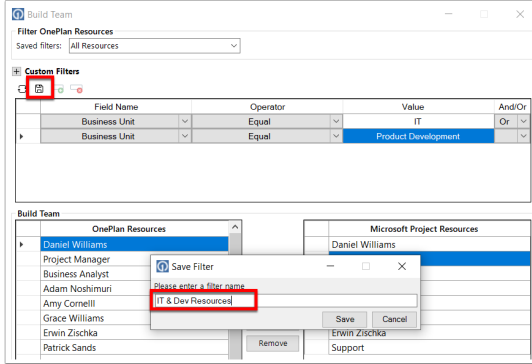
If you have a large Resource Center in OnePlan, you may add filters to limit which resources show for mapping. Select a resource-level field, such as department, role, etc. Select the operator, and enter the desired filter value. If adding additional rows, select And/Or for how the filters should work together. Once the filters are set, you may minimize the filter section again to map the resources.

Menu options: Refresh/Apply Filter, Save Filter, Add Filter Row, Remove Filter Row



### Save Filter

If you expect to use the same or similar filters, click the Save Filter icon. Enter the filter name. It will now show under the saved filters drop down.

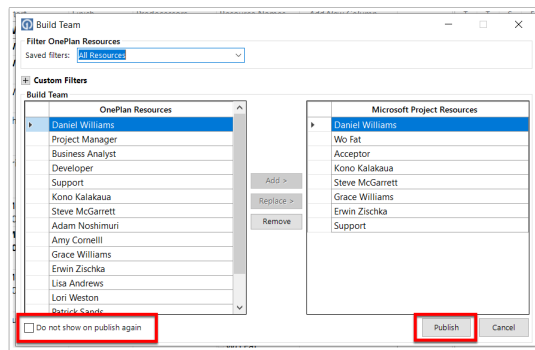
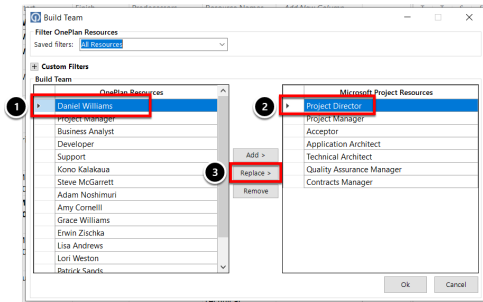


### Map Resources

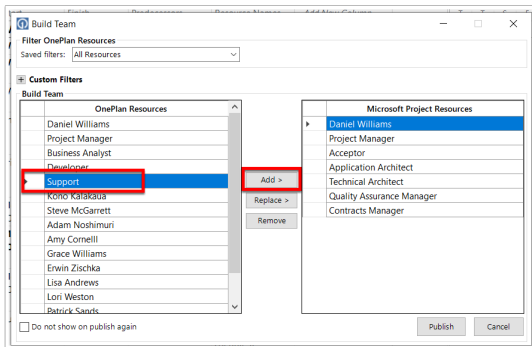
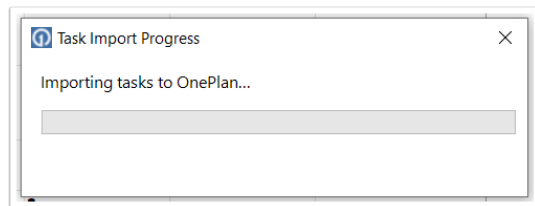
Select the name of a OnePlan resource on the left side. Select the name of a resource from your MS Project schedule on the right side. Click **Replace**. This will replace any references to that MS Project schedule resource with the name of the OnePlan resource.

You may select the check box to not show on publish (you'll still be able to manually map resources via the ribbon button).

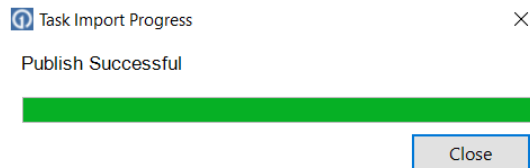
Once all mappings are done, click the **Publish** button.



Select the name of a OnePlan resource on the left side. Click **Add**. This will add the name to the MS Project schedule list of resources.



### Publish Successful



If a name is mapped that you want to change, select the row on the right side, then click the **Remove** button.

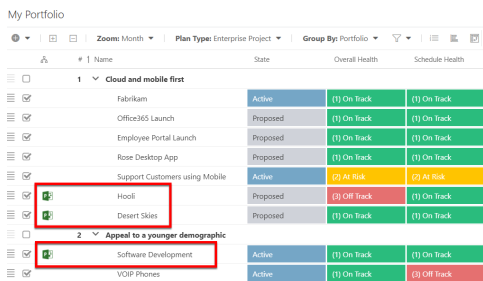


## Open Plan in OnePlan

Open the Schedule Grid page of your plan. If you were already there, refresh your browser. The tasks will show for your plan now.

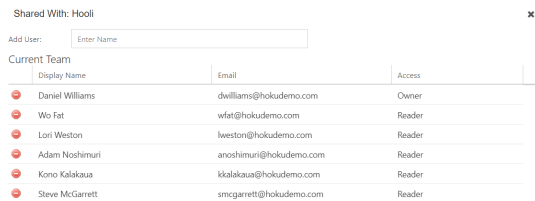
## View Which Plans are Connected to MS Project

Navigate to the Portfolios page. Any plans connected to MS Project will show the Project icon on the row.



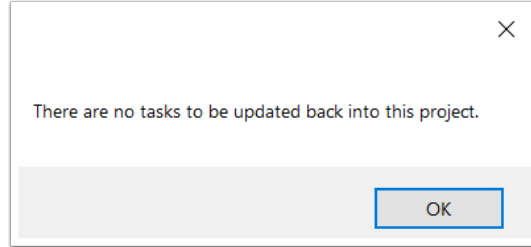
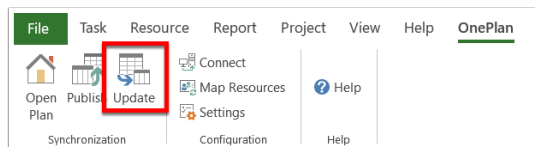
## Updated Team

Any tasks assigned to resources in the MS Project schedule when mapped and published will be added to your plan team (Shared With).



## Updates in Project Schedule

Through the life of the project, come back to your MS Project schedule. Click the Update button to review the updates to tasks made by the team members. If there are no updates, you'll be notified. Otherwise, you may review to accept or reject the updates.



## Map Custom Fields in the OnePlan to Project Connector

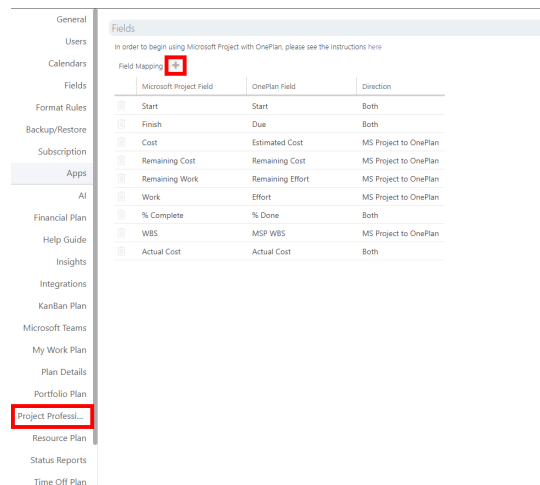
This article explains how to map OnePlan fields and Project fields using the OnePlan to Project Connector.

This procedure requires the Project Professional app to be installed in your OnePlan config. See [How do I Add Apps to OnePlan?](#) for more information.

This procedure also requires the OnePlan for Project Connector to be installed and configured. See [Install the OnePlan for Project Connector](#) and [Use the OnePlan for Project Connector](#) for instructions.

## Map Custom Fields in the OnePlan and Project Connector

1. Go to the OnePlan admin pages > **Project Professional**.
2. Click **New Mapping**. The **New Mapping** form will open.

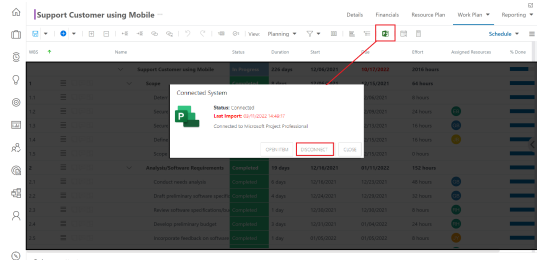


3. Configure the new custom field mapping using the **New Mapping** form.

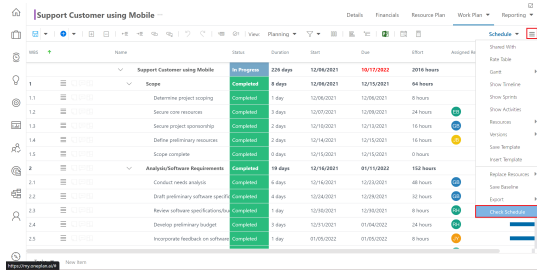
- **Microsoft Project Field:** Select the MS Project field you would like mapped to the selected OnePlan field.
- **OnePlan Field:** Select the OnePlan field you would like mapped to the selected MS Project field.
- **Direction:** Select the direction you would like data to flow in the field mapping. Options include **MS Project to OnePlan**, **OnePlan to MS Project**, and **Both**.

4. Click **Add** to create the new field mapping.
5. Open Microsoft Project Desktop.
6. Open the **OnePlan** menu > **Settings**.
7. Click **Synch Fields** to sync the field mappings you configured in OnePlan.

2. Follow [Use the OnePlan for Project Connector \[72\]](#) to publish your Microsoft Project schedule into OnePlan.
3. Disconnect Microsoft Project from the schedule in the OnePlan Work Plan.
  - a. Click the **Connected Systems** icon in the Work Plan header. The **Connected Systems** popup will open.
  - b. Click **Disconnect** to disconnect Microsoft Project from the schedule.



4. Select the grid options menu > **Check Schedule**. The schedule check will run. Once it is complete, click Ok in the **Check** popup that appears. Save your work plan to save any adjustments made during the check.



## How do I store Project schedules in Teams for my OnePlan group?

This article explains how to set up your OnePlan group to store Microsoft Project Desktop files in a shared Teams Files document library.

This feature requires BOTH the Project Professional and Microsoft Teams apps be installed and configured for your OnePlan group.

## Import Microsoft Project Schedule into OnePlan

This article explains how to import your Microsoft Project schedules into OnePlan.

You would want to use these steps when you are migrating from Microsoft Project to OnePlan as your main project management tool.

1. Follow [Install the OnePlan for Project Connector](#) to install Project Connect in Microsoft Project.

## Why should we use this feature?

This feature allows the schedule files to be in a shared document library, in other words a central hub for your OnePlan group's schedule files. The latest version is saved and accessed from the central library. So, there is no longer the need to look for the latest version or need to use email to share Project schedule files between users. This new feature also prevents people publishing over each other from local desktop copies of the schedule, which could be out-of date.

## Install Apps

If you haven't already installed the required OnePlan apps, do so first.

[How do I set up Project Desktop for OnePlan? \[70\]](#)

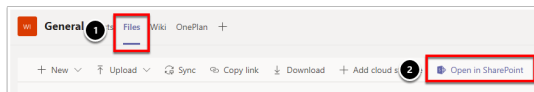
[How do I manage OnePlan in Microsoft Teams?](#)

Configure the Microsoft Teams app and create a group-level team for your OnePlan group.

## Open Files in SharePoint

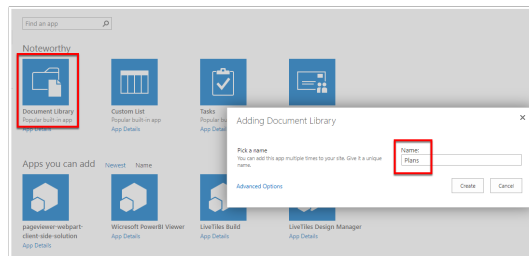
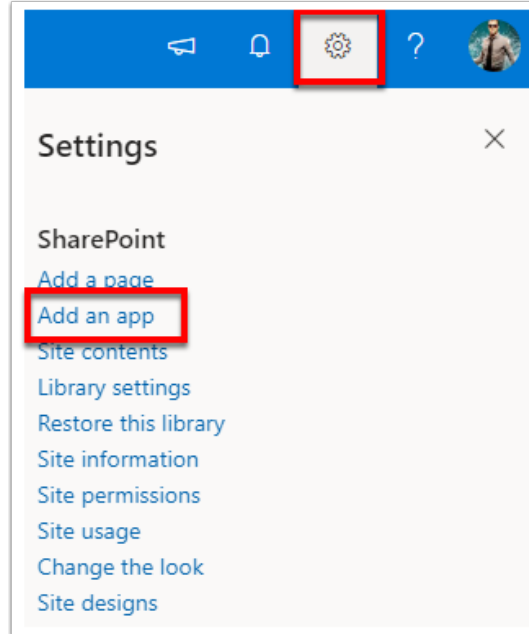
Navigate to Teams. Select your OnePlan group-level team.

1. Open the **Files** library.
2. Click **Open in SharePoint**.



## Create "Plans" Document Library

1. In SharePoint, **add an app**.
2. Select **Document Library** as the type.
3. Name the Document Library **"Plans"**.



## Upload Microsoft Project Templates

1. In SharePoint, **add an app**.
2. Select **Document Library** as the type.
3. Name the Document Library **"PlanTemplates"**.
4. Upload your Microsoft Project **.mpp** templates

## Project Desktop to OnePlan migration best practices

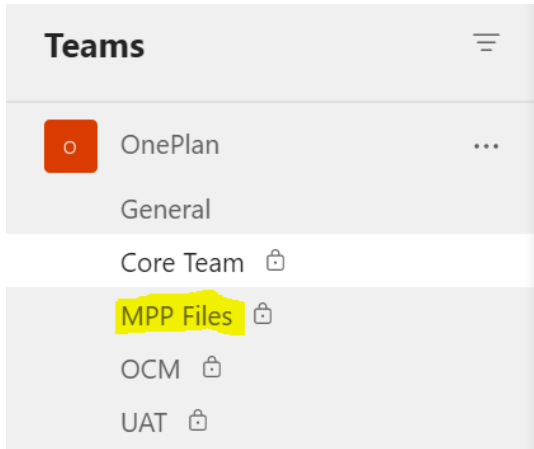
This article describes the process to migrate a Microsoft Project Desktop schedule to OnePlan Workplan.

### Phase one

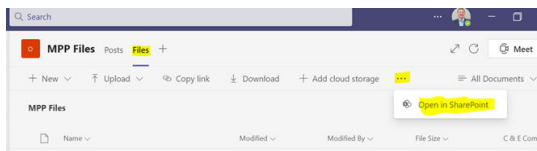
You must have both Microsoft Project Desktop and the OnePlan for Project Connector installed locally on your machine to use the OnePlan for Project Connector.

## Update the Capital-Expense field

1. Make sure Microsoft Project is closed.
2. In Teams, go to **OnePlan > MPP Files**.



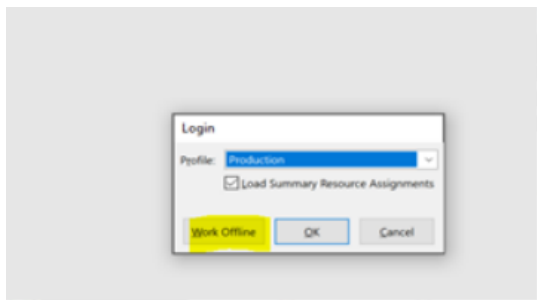
3. In **MPP Files**, click **Files** at the top, then click the ellipsis (...) and **Open in SharePoint**.



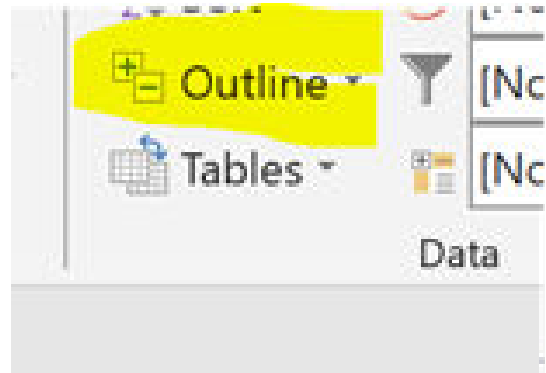
4. Click on the project name



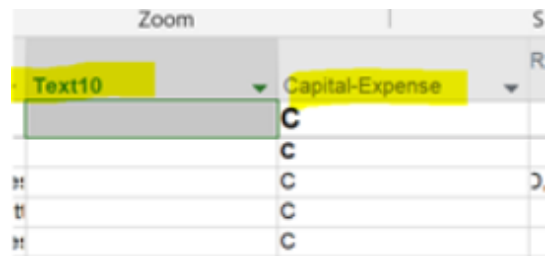
5. Make sure **Profile** references your connection to MS Project Server.
6. Click **Work Offline**.



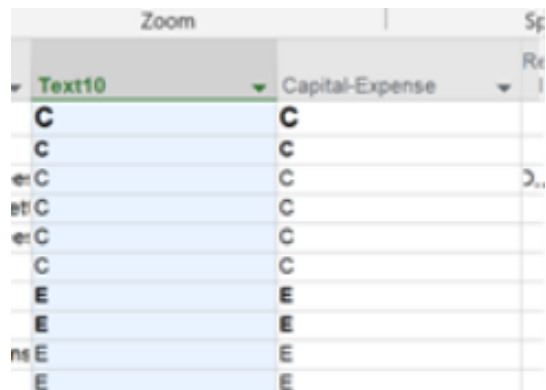
7. Click **View** on top Ribbon.
8. Click **Outline > All Subtask**.



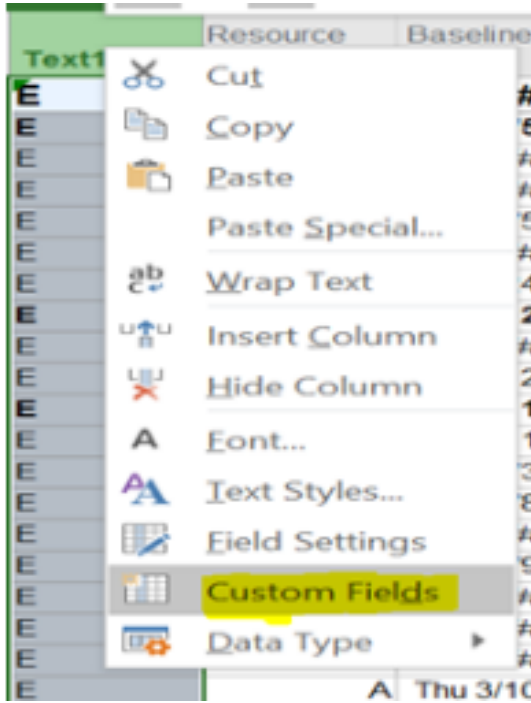
9. Migrate over to the **Capital-Expense** column (Make sure you are on the Gantt Chart View).
10. Right click and insert column (**Text10**). If column **Text10** contains values then insert column **Text11**, and if **Text11** contains no values then Copy and Paste the values from **Text10** into **Text11** column. If **Text11** contains values then try inserting **Text12**, and so on, until you find a text column which has no values.



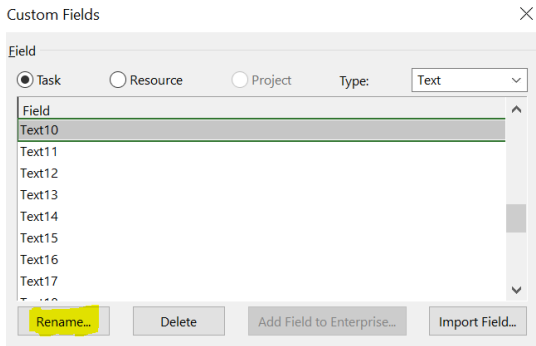
11. Highlight the entire **Capital-Expense** column, then right click and Copy the values from the column. Paste the values into the **Text10** column.



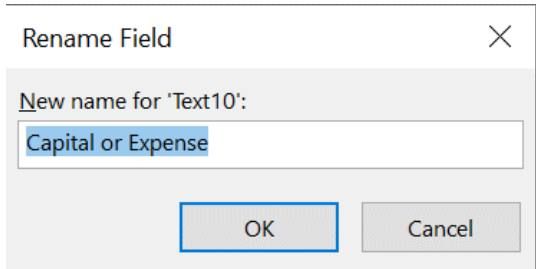
12. Right click on column heading for **Text 10**. Click **Custom Fields**. The **Custom Fields** form will open.



13. In the **Custom Fields** form, click **Rename**.



14. Type in the name as **“Capital or Expense”** in the **New name for 'Text10'** field and click **OK**.



NOTE: The field will map to **Capital-Expense** in the work type **Schedule**.

15. Click **OK** to finish renaming.  
 16. Click **OK** to finish renaming.

17. Update column **C&E Complete** in SharePoint to value **YES** to indicate file has been updated.  
 18. Start over at step 4 (click on project name) to update the next project.

**Phase two**

Phase two cannot be started until the project names have been added to OnePlan.

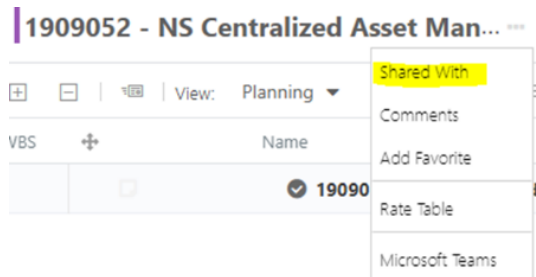
**Connect your migrated schedule to OnePlan using templates**

To continue to use the connected MPP schedules without navigating to the team site folder library, a project must be connected as a template.

All migrated schedules have been added to the template library.

Your Project should now open in Project Professional Desktop.

1. Go to [my.oneplan.ai](http://my.oneplan.ai) and find your project in the Portfolios list.
2. Open your project.
3. On the ellipse (...) after the project name select **Shared With**.

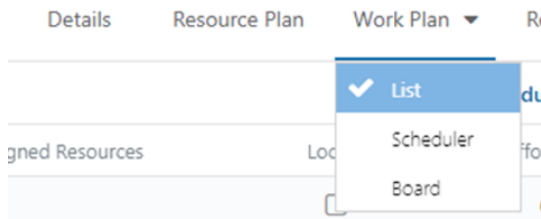


4. Start typing your last name in the **Add User** field.
5. Select your name once it appears. The system automatically adds you.
6. Click in the **Access** column next to your name.
7. Change your access to **Owner**.

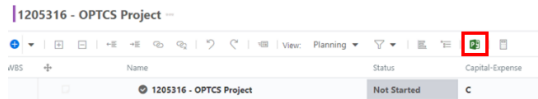


8. Close the screen by selecting the X in upper right corner.

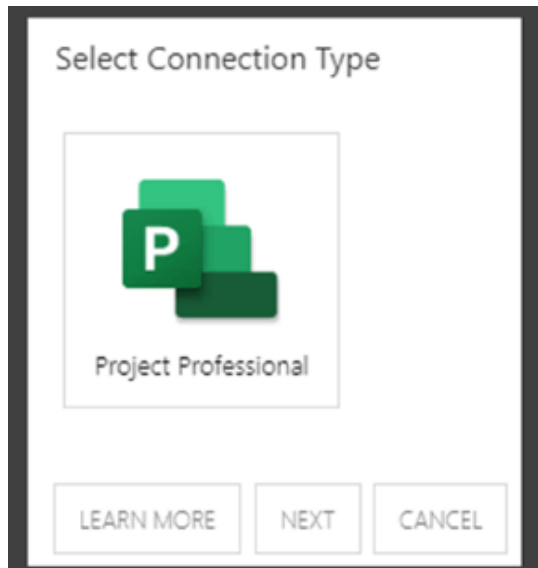
9. Go to **Work Plan > List**.



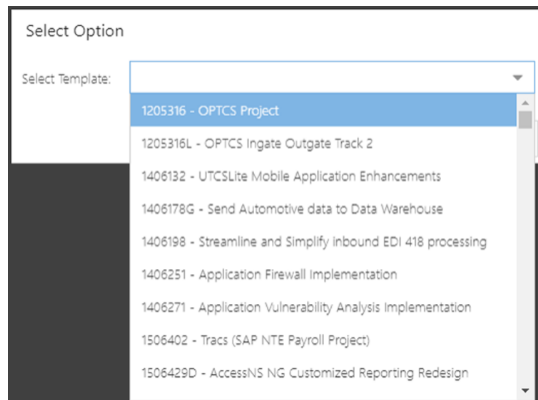
10. In the toolbar, click the **Microsoft Project** icon.



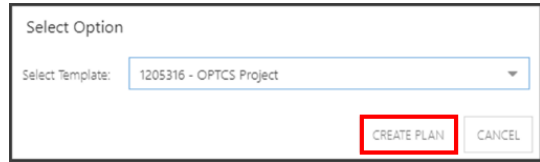
11. Select **Project Professional** and click **Next**.



12. Find the matching and appropriate schedule from the **Select Template** drop down.

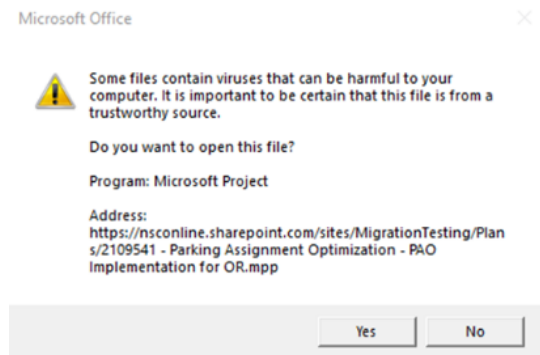


13. Click **CREATE PLAN**.

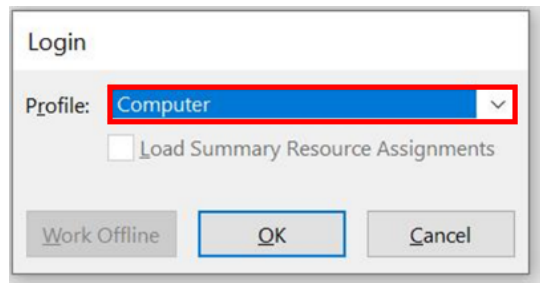


14. Click **Yes** to the Microsoft Office File Warning Screen.

**NOTE:** The pop up may not appear directly on your screen. It may end up behind another application. If this happens you may need to minimize or close your applications until the pop up appears.

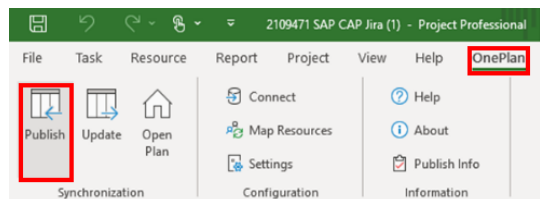


15. Select **Computer** when the Login screen pops up.

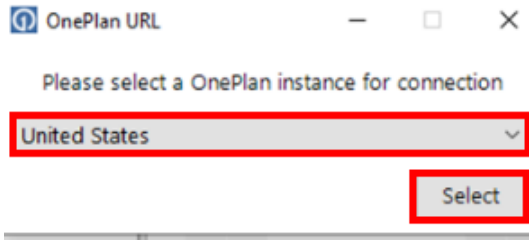


## Publish Project Schedule to OnePlan using MS Project Professional

1. Open the **Oneplan** Tab on the MS Project Professional ribbon menu.
2. Click **Publish**.



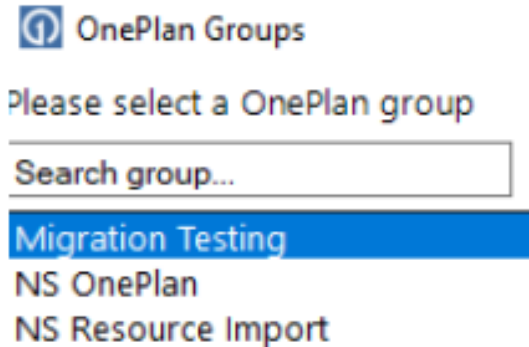
3. If the OnePlan URL screen appears, leave the default to United States.
4. Click **Select**.



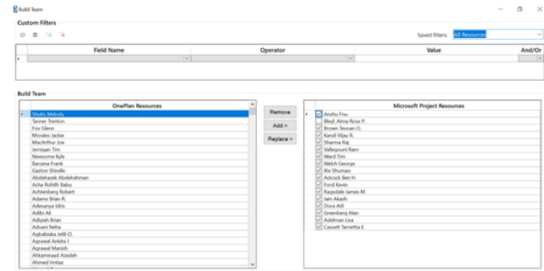
5. The OnePlan Authentication screen will open. Log in using you NS (Norfolk Southern) Corp account.



6. The OnePlan Group select screen may appear. Select **Migration Testing** and click **OK**.



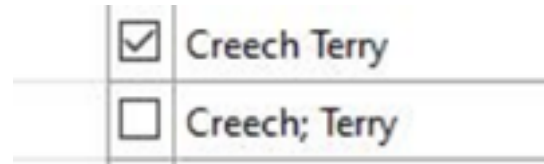
7. The following resource mapping screen will appear.



8. Map your resource to the resources in OnePlan.
  - a. Click to select the resource in the **OnePlan Resources** column.
  - b. Click to select the matching resource in the **Microsoft Project Resources** column.
  - c. Select **Replace**. A check mark will appear on the Microsoft Project Resources.
  - d. Repeat for all remaining active resources. Inactive resources will not appear in OnePlan Resources list and should be skipped.

NOTE: The owner of the Plan will show already mapped. You must remap the owner because it is connected to the wrong account. They will show as duplicate entry in the Microsoft Project Resources section.

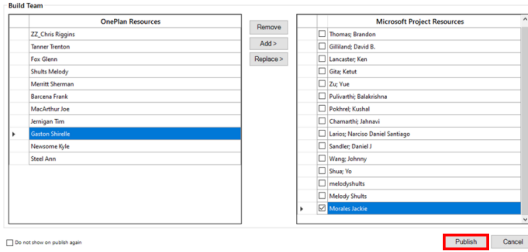
For example:



To correct this, you will need to remove the Owner, for example **Creech Terry**, from Microsoft Project resources by highlighting and clicking **Remove**. Then map **Creech; Terry** to the Oneplan resource on the left. Always map the owner's name with the semicolon (;) in it.

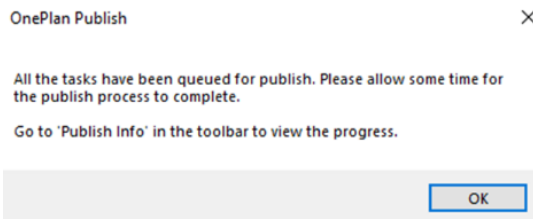
**NOTE:** If you do not see the check boxes in the Microsoft Project Resource section try adjusting you monitor display to 1920 X 1080.



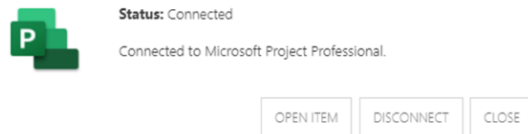


8. Review the schedule and confirm data has published from Project Desktop, especially Capital and Expense.
9. Review the tasks in the Oneplan schedule and confirm the PM (Project Manager) and other resource have been mapped to tasks.
10. Click the the Project Professional icon and confirm you can open the schedule directly from the work plan type Schedule.

9. Select **Publish** in the lower right of the resource mapping screen.
10. The following pop up will appear. **If the pop up does not appear, go back up to the OnePlan Tab and select publish again.**



11. Select **OK**.
12. On the OnePlan tab, select **Publish Info**.
13. Log in using your nscorp account.
14. Publish screen will appear with process status. Validate the process has completed.
15. Close project and select **Yes** to save.
16. Click **Close** on the **Connected System** screen.

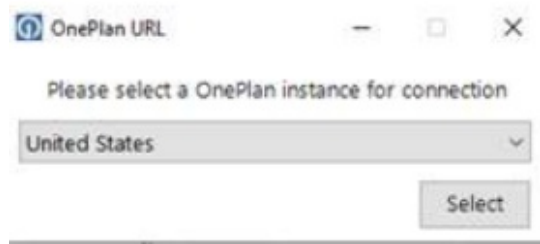


### Open a Published schedule in OnePlan

1. Go to [my.oneplan.ai](https://my.oneplan.ai).
2. On the left navigation select **Portfolio** icon.
3. A list of Projects that you are the owner of will appear.
4. Click on the Project Name you just published to in the previous steps.
5. Go to the **Work Plan** tab.
6. Select **List** from the drop down.
7. Select work type **Schedule**.

### Archive section

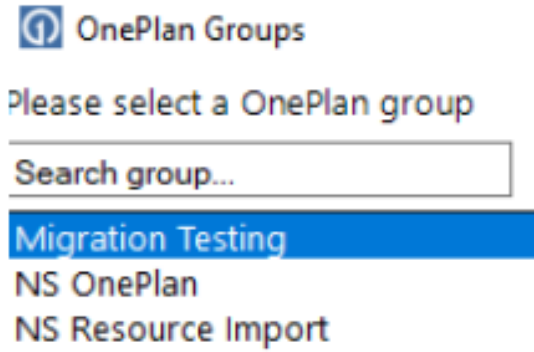
1. If the OnePlan URL screen appears. Leave the default to United States.
2. Click **Select**.



3. OnePlan Authentication screen will open. Log in using you NS (Norfolk Southern) Corp account.



4. OnePlan Group select screen appears.
5. Select **Migration Testing** and click **OK**.



6. A selection screen will appear where you can select the associated Project in OnePlan to connect to.
7. Search to find the matching plan in OnePlan. Click the plan to select it and click **OK**.  
**NOTE:** If you do not see your project listed, STOP and follow the steps beginning with step 5 to make yourself an owner of the project. Once you are an owner on a project you can then import a schedule.

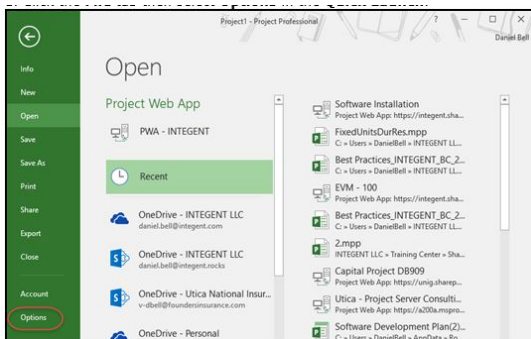
## How to clear cache in MS Project Professional?

In order to clear the cache in Microsoft Project Professional we will start with the product opened with a blank project schedule as shown below.

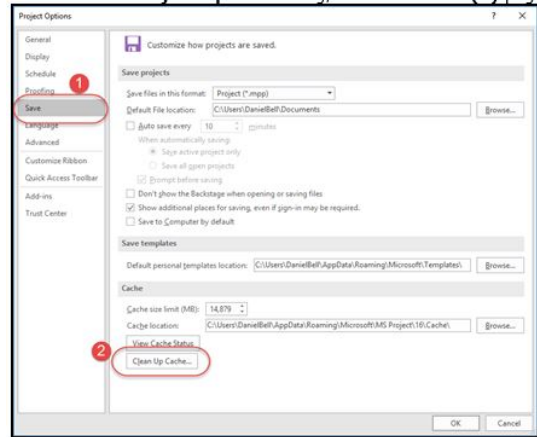
**Important**, DO NOT have any project schedules opened at this time in Microsoft Project.

Continue with the following steps:

1. Click the **File** tab then select **Options** in the **Quick Launch**.



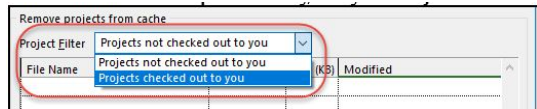
2. Once in the **Project Options** dialog, select the **Save(1)** page, then click the **Clean Up Cache (2)** button.



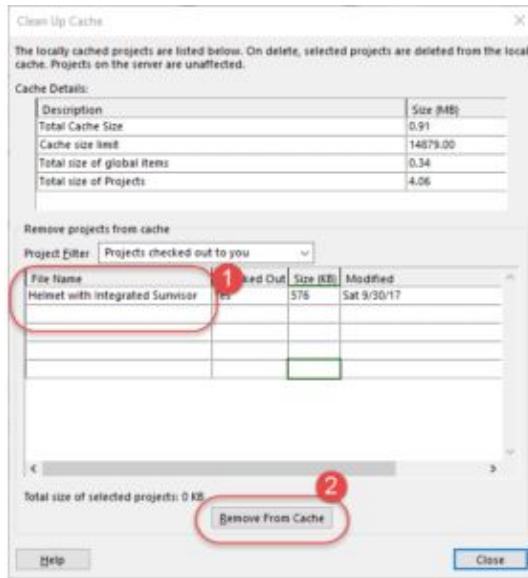
3. In the **Clean Up Cache** dialog perform the following:
  - Select all the projects in the **Remove projects from cache** section. Use **Shift-click** to simplify selection.
  - Click the **Remove From Cache** button.

**Note:** The screenshot on the left is before we cleared projects from the cache. The screenshot shows the cleared cache.

1. While still in the **Clean Up Cache** dialog, change the **Project Filter** to **Projects checked out to you** via the drop down list box.



2. If there are any projects showing up in the cache now, perform the same procedure and clear them from the cache (Important, ensure you do not currently have any projects opened!)
  - Select all the projects in the **Remove projects from cache(1)** section. Use **Shift-click** to simplify selection.
  - Click the **Remove From Cache(2)** button.



Click the **Close** button when finished.

# MS 365 Planner Integration

## Set up the Microsoft 365 Planner integration

This article explains how to set up the integration between your OnePlan environment and Microsoft 365 Planner.


<https://player.vimeo.com/video/556935360>

## Get an integration key from OnePlan



### NOTE

You must have administration access to get an integration key from OnePlan.

1. Log into OnePlan.
2. Click the Settings icon  to access the Admin pages.
3. Go to **Integrations**.
4. In **Authentication Keys**, click **Add Key**. The **Add Key** form will open.
5. Enter a name for the new key in the **Key Name** field (e.g. "Project for the Web"). Click **Add** to generate a new key.

6. Save the key name and generated key in a secure location (e.g. copy/paste into a [protected OneNote notebook](#)) for use in the OneConnect configuration.

Authentication Keys +	
App Name	Key
Reporting	*****
Project for the Web	cixXnP3D2UhJuwKcdJORZ-W1zuI77a6



### NOTE

Once you navigate away from the OnePlan admin page, the new key is encrypted.

## Set up the integration in OneConnect

1. In **Integrations**, click **New External Integration**. You will be redirected to [my.oneconnect.ai](https://my.oneconnect.ai).

2. Under **Integrations for OnePlan**, select **OnePlan and M365 Planner**. Click **Configure**. The integration configuration settings will open.

3. Configure the OnePlan and Microsoft 365 Planner integration.

- a. Complete the OnePlan configuration section.

- **OnePlan Group Name:** Enter the name of the OnePlan group that you are connecting to.
- **Authentication Key:** Enter/paste the OnePlan Key that you saved from the earlier OnePlan Setup steps.
- **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used



**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

b. Click **Next**.



**NOTE**

The M365 Planner section will open. You will skip the Integrators section. There is no set up required in the Integrators section.

c. Complete the M365 Planner configuration section.

- Click **Authorize**
- Check the select this checkbox to allow updates to Office 365 planner tasks

d. Click **Next**.

**Integration Information**

**Functionality**

This integration has two main use cases for functionality.

1. Create or Update plans from OnePlan as a Plan in Microsoft 365 Planner.
2. Create or Update tasks from Microsoft 365 Planner into OnePlan schedule.

**Scheduled Jobs**

\*Microsoft 365 Planner currently does not support scheduled jobs.

1. **OnePlanUpdate**
  - Synchronize plans and tasks from Microsoft 365 Planner to OnePlan
2. **OnePlanPublish**
  - Synchronize OnePlan plans and tasks into Microsoft 365 Planner as plans and tasks

**Default Field Mapping**

Plans (OnePlan) <--> Plans (Microsoft 365 Planner)

OnePlan Fields	Microsoft 365 Planner Fields	Direction
Name	Project Name	Both
Owner	Owner	Both

Tasks (OnePlan) <--> Tasks (Microsoft 365 Planner)

<b>OnePlan Fields</b>	<b>Microsoft 365 Planner Fields</b>	<b>Direction</b>
Name	Task Name	Both
StartDate	Start Date	Both
EndDate	Due Date	Both
% Done	% Complete	Both
Assigned to	Assigned to	Both

# Azure DevOps Integration

## Azure DevOps Epics Integration - Integration Overview

This article explains the main use case and out-of-box capabilities for the integration between OnePlan and Azure DevOps: Epics, using the OneConnect integration platform.

<https://player.vimeo.com/video/559670924>

### About

OneConnect for Azure DevOps offers a seamless approach to exchange critical information between development teams and project teams using OnePlan and Azure DevOps.

This integration specifically synchronizes plans from OnePlan as **Epic** work items (typically stories, tasks, and bugs) and synchronizes work items back to OnePlan as backlog items.

### Agile Project Visibility in Oneplan

Synchronize key data between OnePlan and Azure DevOps to establish enterprise level portfolio level visibility. Regardless of team execution methodology (i.e. waterfall or agile), projects are centrally visible for analysis and reporting.

- **"Epics"**: OnePlan plans sync as Epics under a selected Team Project & Area Path.

### Epics Process

This is the high level process flow for using the integration.

1. As Epics reside beneath a parent Azure DevOps Team Project & Area Path, the Team Project & Area Path(s) must first exist in Azure DevOps before creating the plan in OnePlan.
2. Create a new plan in OnePlan. When the integration is configured, a new field will be created in OnePlan. The field is "TeamProjectsArea," which is a lookup table populated with the Team Projects & Area Paths from Azure DevOps. Select an Area Path under the Team Project.
3. Teams may use their normal process for project approval, portfolio analysis, etc.

4. When a project is active and ready to execute using Azure DevOps with an agile methodology, the PM synchronizes the project to Azure DevOps by clicking on the synchronize button. A new Epic is created with the same plan name under the earlier selected Team Project & Area Path.
5. The PM builds out the project's agile plan under the epic - the features, user stories, task & bugs.
6. The PM puts work items (stories, tasks, and bugs) into an iteration. This is important, as only items noted into an iteration will sync back to OnePlan.
7. Team members work using Azure DevOps as usual. They update status on work items (stories, tasks, and bugs).
8. Updates sync back to OnePlan. The data that syncs back is based on the configuration settings mapped fields. This can be done on a scheduled timed-basis or on-demand. The schedule is part of the configuration settings (hourly, daily, etc.). If syncing on-demand, you must go into OnePlan and click Sync. This will pull in the changes/updates from Azure DevOps.
9. Back in OnePlan, the plan is updated with the Azure DevOps work items as Backlog Items in the plan.

### Important Notes

- The backlog item sync is bi-directional even after the initial sync. You can create or edit data in OnePlan or Azure DevOps and then sync to the other system. The only fields that are not editable in OnePlan are the ones you choose to only sync *from DevOps to OnePlan*.
- Sprints are synced into OnePlan.
- The integration is also supported on Team Foundation Services (On-Premise), but only for the following versions: 2015, 2017, and 2018.
- Must have full admin privileges/accounts in both OnePlan & Azure DevOps to configure the integration.
- The default Azure DevOps Work Item types are Tasks and Bugs. These sync to the OnePlan



work plan list as type: Backlog. Other types can be configured to also come over, such as Features, User Stories, etc. but they will still come in as plan backlog items, in a flat hierarchy.

- Mapping projects from OnePlan to Azure DevOps work item (Projects -> Epics):
  - Able to assign the mapped work item's area path in Azure DevOps. (Support multi-level area path)
  - User entered the field over in OnePlan's projects field and specify its area path. When the scheduler runs, the projects synched over to Azure DevOps will get assign to the correct area path.
  - User can update the area path of the work item that has been mapped, when the scheduler is run at future time. (Only area path within the same level of team area project assigned to the work item type at first synched to Azure DevOps)
  - Able to generalize mapping work item type to Azure DevOps. (Not specifically for Epics only)
- User can enter their valid desired work item type over in the connector GUI, and specify the work item type (Epic, Bug, Feature, etc..)
  - User can update/change the work item's type that has been mapped, when the scheduler is run at future time.
  - Able to link the work item type to its corresponding parent item type when synchronizing the item from OnePlan to Azure DevOps.
  - User will specify in the OnePlan's projects field its parent item type, and when the scheduler runs, the item type being synchronized will be linked to its corresponding parent item type.
- Mapping items from Azure DevOps to OnePlan tasks (Tasks -> Items):
  - Able to select the work item type in Azure DevOps below the parent item and it will be mapped as task schedule table in OnePlan.
- Mapping team area projects from Azure DevOps to OnePlan lookup table (Lookup\_Team Projects Area -> Team Projects Areas)
  - Able to synchronized team area project level (Currently support up to 100 levels) to a Team Projects Area lookup table in OnePlan.

## Restrictions/Rules/Limitations

- **Basic mapping rule:** Make sure to map fields that are required by the other side of the connector (in this case is Azure DevOps), if the fields are required by Azure DevOps, then map the fields of that item to get synchronized from OnePlan to Azure DevOps.
- Empty Team Projects Area field in OnePlan is not allowed. (\*Has to have an area path for the project)
- To support multi-level area path in OnePlan's lookup table, user need to adjust the code mask section in the lookup table settings based on the number of level the user need. (eq. 4 level = \*.\*.\*.\*)
- User can only enter a single work item type in the Azure DevOps Work Item Type column in the connector GUI.
- If user does not enter/leave empty the work item type column, it will by default be "Epic" work item type.
- Invalid input work item type will not let current new item being synched gets created in Azure DevOps.
- Invalid input on work item type will not let current item being synched gets updated on its item type field in Azure DevOps, if this work item has ever been mapped before.
- When user enter a single work item type in the GUI, it must be very specific to the work item type shown in Azure DevOps (They are case-sensitive). Take an example from the below picture, when mapping "Epic" work item type, the value entered on the GUI of the connector must follow the same key word "Epic", see the highlighted part below. (Column name: Azure DevOps Work Item Type)



- When a user deletes an item in Azure DevOps, the next time the scheduler runs, it will still synchronize (recreate) that item from OnePlan to Azure DevOps. Unless the item is also deleted in OnePlan, then that item will never be synchronized back to Azure DevOps.
- Changing area path to a different team project is not allowed by Azure DevOps. Only changing

area path level within the same team project that has been initialized at the first time the work item is synchronized is allowed.

- Parent item name declared in OnePlan lookup table need to be in this specific format: “parent name parent id”, where the parent id is placed at the very end after “-“.
- Attempting to change the parent item of the already mapped item is not currently supported. Parent item will be linked to the current item being mapped only during the first creation of this item to Azure DevOps. The later the scheduler runs, any updates related to parent item will not get updated. \*If user did not enter/wrong input the parent item in the project field in OnePlan, delete the item from Azure DevOps, and assigned the correct parent item to the field in OnePlan, and have it synchronized back to Azure DevOps/wait for the scheduler to run.
- Sample of the input for work item type to be synched to Azure DevOps and work item type that will be synched to OnePlan as Task: (Same rule regarding work item type case sensitivity when getting input in the GUI, explained above)

- Work item types in Azure DevOps that will be synched to OnePlan as Task schedule needs to be at the same project area path with its parent project area path. For instance, from the picture below, a user want to synched work items that are below “Azure DevOps Test Hans Epic” as Task in OnePlan, with this specified work items type only: Feature, Task, and Bug. So these items need to have the same area path as “Azure DevOps Test Hans Epic” which is shown in the second picture below.

Order	Work Item Type	Title	State	Effort	Busin.	Value Area	Tags
1	Initiatives	VSTS Test - Hans Initiatives	# New				
	Epic	VSTS Test Hans - Epic	# New			Business	
	Feature	VSTS Test Hans - Feature	# New			Business	
	User Story	VSTS Test Hans - User Story	# New			Business	
	Task	VSTS Test Hans - Task	# New			Business	
	Bug	VSTS Test Hans - Bug	# New			Business	

- Work item types need to be at an iteration to get synched to OnePlan. Only tasks and bugs need to be in an iteration; other work item types (Non-Bug and Non-Task) will just be brought over to OnePlan as Tasks.
- Azure DevOps Synchronize Button Functionality Expectation:
  - Create a newly created project in OnePlan to Azure DevOps work item type.
  - If the item has already been created/synched to Azure DevOps before through the button, the next time the button is clicked, it will only update back to OnePlan from Azure DevOps. Any updates in OnePlan to Azure DevOps will never be made through the button (Therefore, the “ProjectPublish” strategy is needed to synch over updates from OnePlan to Azure DevOps).

## Azure DevOps Epics Integration - Integration Setup

This article explains how to set up the Azure DevOps Epics to OnePlan Plans integration.

To set up this integration, you need:

- to have OnePlan and OneConnect approved by an Office365 tenant admin
- to be a OnePlan admin, meaning you are a user with **Owner** permissions in OnePlan
- to be a OneConnect Administrator or Editor in the OneConnect group where you want to set up the integration
- to be an Azure DevOps admin

## OnePlan Setup


The following video walks through the steps to set up OnePlan for the Azure DevOps Epics to OnePlan Plans integration.

<https://player.vimeo.com/video/730060278>

For the integration configuration, you will need to collect the following information from OnePlan:

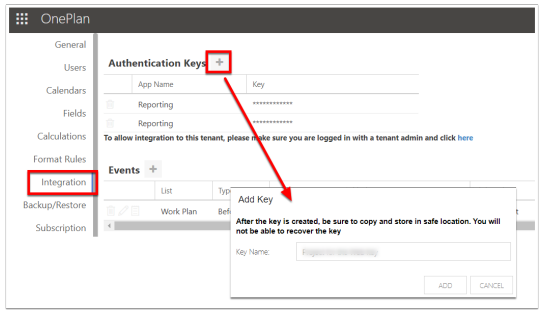
- the group name
  - an authentication key
  - the authentication key name
1. Log in to your OnePlan group with your Office365 account.

2. Generate a new authentication key
  - a. Open the Admin pages by clicking on the Settings gear.
  - b. Select **Integration** in the admin navigation.
  - c. Click the + (plus) icon in the Authentication Keys section.
  - d. Enter a name for the new authentication key. Then click **ADD** to create the key.



**NOTE**  
It is best practice to create a new authentication key for each integration, and to name each authentication key so you know which integration it belongs to. For this integration, we recommend a name like "Azure DevOps Integration".

- e. Save the key name and generated key somewhere secure. Once you navigate away, the key is hidden.



## Azure DevOps Setup

The following video walks through the steps to set up Azure DevOps for the Azure DevOps Epics and OnePlan Plans integration.

<https://player.vimeo.com/video/730099480>

For the integration configuration, you will need to collect the following information from Azure DevOps:

- the Azure DevOps URL
- an Personal Access Token



### NOTE

It is best practice to create a service account to use for the integrations. We strongly recommend setting up an Azure DevOps service account with admin permissions to use in this configuration.

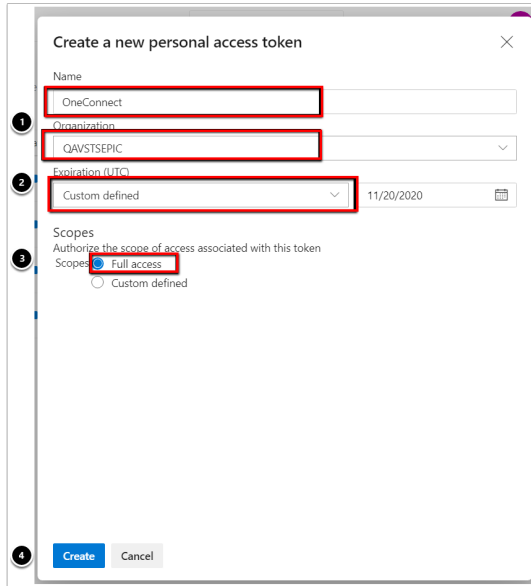
1. Copy and save the root of the URL (i.e. <https://dev.azure.com/Organization>).
2. Generate an Azure DevOps Personal Access Token.
  - a. Go to Azure DevOps.
  - b. On the top right-hand corner, click on **User Settings** and select **Personal Access Tokens**. Once you are redirected to the user settings page, click New Token and fill out the information.
    - Make sure to provide a token name and only allow the token access within the organization you are going to connect in OneConnect.
    - Set the Expiration to be the maximum (Azure DevOps only allows 1 year as the maximum token validity) by selecting **Custom Defined** and select the dates.
    - Set the **Scopes** for the token to **Full Access**.



### NOTE

If your Organization does not allow Full Access for any reason, we understand. The integration requires the following permissions at minimum:

Scope Name	Permission Level
Identity	Read and Manage
Work Items	Read, Write, and Manage




- c. Click **Create**. After you click Create, you will be provided with the token. Make sure to save the token name, key and expiration date somewhere (notepad, doc, etc.), as once you close the tab, the key will remain hidden. Also, note the expiration date to extend the token once it expires.

## OneConnect Setup

1. Go to <https://my.oneconnect.ai>.
2. Navigate to **OnePlan Plans and Azure DevOps Epics**. Click the **Configure** button. The integration configuration form will open.




3. Complete the integration configuration form.
  - a. Complete the OnePlan Section.



**NOTE**  
Expand the **Additional Options** heading to see all the necessary fields to be filled in.

- **Group Name:** Enter the OnePlan Group name you will be integrating into.


- **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
- **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than <https://my.oneplan.ai>, please enter the appropriate URL here.



**NOTE**  
Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

- **(Optional) Button Name:** If connecting multiple Azure DevOps organizations to a single OnePlan Group, use this field to create a custom name for the Azure DevOps button connecting to the listed Azure DevOps organization.
- **(Optional) OnePlan Default Plan Type:** This is to be used in replace of the Portfolio Plan Type field mapping, should one not be provided automatically within the integration. This is to provide a default plan type for any plan level work items that are brought into OnePlan. A single value should be entered.

- b. Click **Next**.
- c. Complete the Azure DevOps Section.



**NOTE**  
Expand the **Additional Options** tab to see all the necessary fields to be filled in.

- **Azure DevOps URL:** Enter the Azure DevOps organization URL (e.g., `https://dev.azure.com/{OrganizationName}`).
- **Azure DevOps Personal Access Token:** Enter the Personal Access Token of the organization that will be integrating into OnePlan.

Azure DevOps URL

e.g., `https://dev.azure.com/{OrganizationName}`

Personal Access Token

Must be a Project Collection Administrator

- **Azure DevOps Plan Level Type:** Enter a single Azure DevOps work item type that will be the Plan level item in OnePlan. If there are more than one work item types listed, no plans will be brought in.
- **Azure DevOps Work Item Type:** Enter any work item type desired to be imported from Azure DevOps into OnePlan as a Backlog/Task level item.

Azure DevOps Plan Level Type

Use with either Epics or Plans Hierarchy integrations.

Azure DevOps Work Item Type (Comma Separated)

Use with any OnePlan to Azure DevOps integration.

- **(Optional) Bring In Tasks and Bugs that are not in an iteration/sprint:** (Default) When unchecked, only the tasks and bugs that are in a sprint will be brought in. When the box is checked, all items will be brought in (even if no sprint is selected).
- **(Optional) Allow creation and editing of work items in OnePlan to be brought into Azure DevOps:** (Default)

When unchecked, users in OnePlan will be unable to:

- Create new tasks
- Export changes made on tasks in OnePlan back into Azure DevOps

- d. Click **Next**.



## OnePlan Changes When Integration Setup is Complete

Once the integration is complete, three things will occur in the OnePlan integration page:

- An integration line item is made.
- An integration event is created.
- Azure DevOps is now available in the Connected Systems icon.

### Integration Line item

Each item within the Integration section shows the OneConnect integrations connected to the OnePlan Work Plan.

Integrations +	
System	List
 Azure DevOps	Backlog
 Jira	Backlog

### Integration Event

Integration events are automated responses that will bring data over from OnePlan into Azure DevOps.

What this event does is trigger the OnePlanPublish strategy for any item that is connected to Azure DevOps. This will bring any values that are mapped to go from OnePlan to Azure DevOps to be updated.

What triggers this event is after a connected item has been saved in OnePlan. At the plan details page, this occurs after an item has been modified and then is automatically saved. At the backlog level, this is done after editing a field, and then clicking **Save**.

### Connected Systems

Any item that is connected to Azure DevOps will show the Azure DevOps icon at both the My Portfolio page, and for any item in the Work Plan Backlog page for plans and tasks that are connected to Azure DevOps.

To connect an item from OnePlan into Azure DevOps, navigate to the Work Plan - Backlog page, click on the plug icon (Connected Systems Icon) and select the options of connecting to an existing item within Azure DevOps, or creating a new item. Once the plan is connected, the Connected Systems window can also be used to Import, Export, or Open the Azure DevOps Plan level item.

## Azure DevOps Epics Integration - Default Field Mappings and Scheduled Jobs

This article explains the Azure DevOps Epics to OnePlan Plans default field mappings and scheduled jobs for your integration.

### Default Field Mappings

OnePlan Fields	Azure DevOps Fields	Direction	Notes
Name	Title	Both	Required
Plan Id (Structure)	Parent Item ID	Both	Recommended
Assigned To	Assigned To	Both	
Iteration (OnePlan)	Iteration Path	Both	Recommended
Item Type	Work Item Type	Both	Recommended
Start	Iteration Start Date	ADO to OnePlan	
Due	Iteration End Date	ADO to OnePlan	
Effort	Original Estimate	ADO to OnePlan	
Points	Story Points	ADO to OnePlan	
Remaining Effort	Remaining Work	OnePlan to ADO	



### IMPORTANT

After the integration is installed, it is best practice to check the default field mappings for errors or missing mappings.

### Lookup Tables - Team Area Projects

OnePlan Fields	Azure DevOps Fields	Direction	Notes
Team Project Areas (Plan)	Project/ Area Name	ADO to OnePlan	Recommended

The following video walks through the default field mappings for the Azure DevOps (ADO) and OnePlan Epics integration.

<https://player.vimeo.com/video/730357797>

### Plans - Epics

OnePlan Fields	Azure DevOps Fields	Direction	Notes
Name	Title	Both	Required
Team Project Areas	Area ID	Both	Required
Owner	Assigned To	Both	Required
Portfolio Plan Type	Work Plan Type	ADO to OnePlan	Recommended

### Backlog - Items

### Lookup Tables - Pick List Lookup



### IMPORTANT

This table is intentionally left empty. Only choice fields should be mapped in this table to run the SyncLookupToADO strategy.

OnePlan Fields	Azure DevOps Fields	Direction	Notes
----------------	---------------------	-----------	-------

### Default Scheduled Jobs

The following scheduled jobs are installed by default:



- **OnePlan Update:** Publish data from Azure DevOps to OnePlan.  
This strategy has a filter within the **Azure DevOps - OnePlan > Epics – Plans** section. This filter will only sync items that are already mapped to OnePlan. Please talk to your OnePlan Contact about filtering the information being brought in from Azure DevOps. If this filter is removed (and not replaced with an alternative filter), all items will be brought into OnePlan.
- **OnePlan Publish:** Publish data from OnePlan to Azure DevOps.  
This strategy has a filter within the **OnePlan - Azure DevOps > Plans – Epics** section. This filter will only sync items that are already mapped to OnePlan. Please talk to your OnePlan Contact about filtering the information being brought into Azure DevOps. If this filter is removed (and not replaced with an alternative filter), all items will be brought into Azure DevOps.

## Optional Strategies

These strategies are available to be scheduled but are not installed by default. Click on the **Add Schedule** button to see the list of strategies.

- **OnePlanPlanItemsCleanUp:** Deletes OnePlan task/backlog items that have been deleted from Azure DevOps. This does not delete plans from OnePlan.
- **SyncLookupToADO:** Synchronize a list of items from Oneplan to ADO lookup field.

## Azure DevOps Epics Integration - Recommendations and Best Practices

This article describes OnePlan's recommendations and best practices for the Azure DevOps Epics integration.

### Make Work Item Type a Plan Type

In OnePlan, the default Plan Types are: Portfolio, Program, Project, Epic, Objective, Idea, and Key Result. If the Work Item Type is of any other value than the above list, then the plan will be imported, but it will not be imported correctly and might be considered “missing” from the **My Portfolio** page.

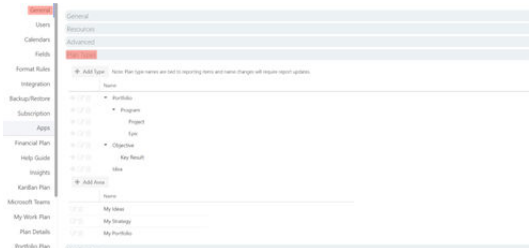
## Set Up the Plan Type

While in OnePlan, navigate to Config > **General > Plan Types > Add Type**. Add the Work Item Type to the desired hierarchy level. Once complete, feel free to run the **OnePlanUpdate** strategy against a single plan to verify it worked.



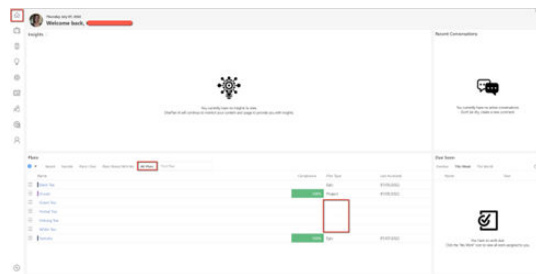
### NOTE

This field is case sensitive, if the values do not match exactly, the plan type field will remain blank.



## My Plan is Missing from My Portfolio

To check if your plan was brought in, go to **Home > Plans > All Plans**. Type in the name of the plan, if the plan is there, look at the Plan Type column. If it is blank, then you need to manually change this to a valid plan type via the **Reorganize** button on the left side of the plan name.



## Make Integration Bi-Direction OneConnect

1. Check the box **Allow creation and editing of work items in OnePlan to be brought into Azure DevOps**.



- The field mappings desired to go in both directions are set correctly (Please do not modify any of the fields marked as Required in the Field Mappings section). To alter this, click on the arrows between the options saved.
- Add Value Mapping to any values that do not match between Azure DevOps and OnePlan. This is mainly used with Multi-/Choice fields.

### OnePlan

- (Task/Backlog) Ensure that any backlog item going back into Azure DevOps has the appropriate **Item Type** selected.

### Multi-Organization Use

The ADO and OnePlan integration also supports multiple Azure DevOps Epics integrations to the same OnePlan group!

Each integration will be connected to a single Azure DevOps Organization.

### Authentication Keys

We highly recommend that each integration is given its own OnePlan Authentication Key.

### Button Name

For syncing purposes, we recommend that each integration be given a unique name, this name will be used to differentiate between the Azure DevOps Organizations when exporting data from OnePlan.

- Within OneConnect, expand **Additional Options**.
- Fill out the **Button Name** field that will indicate which Organization you are syncing to.

## Azure DevOps Plan Hierarchy Integration - Integration Setup

This article explains how to set up the integration between OnePlan and Azure DevOps and incorporate a hierarchy structure.

This integration focuses on synchronizing data between OnePlan and Azure DevOps. Multiple nested Work Item Types in Azure DevOps will be imported into OnePlan as hierarchical plans. Any other Work Item Types will be brought into OnePlans' Work Plan – Backlog section as tasks.

## OnePlan Setup

For this integration, you will need to collect the following information from OnePlan:

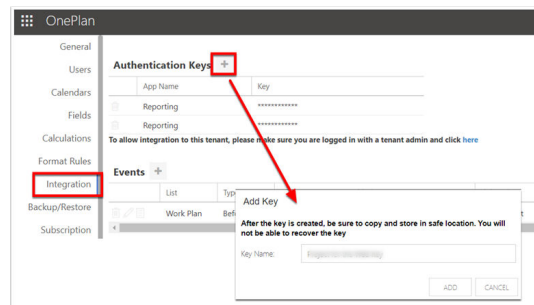
- the group name
- an authentication key
- the authentication key name



### NOTE

To complete the OnePlan setup, you need to be an admin (user with Owner permissions) in OnePlan.

- Log in to your OnePlan group with your Office365 account.
- Open the Admin pages by clicking on the Settings gear.
- Select Integration in the admin navigation.
- Click the + (plus) icon in the Authentication Keys section.
- Save the key name and generated key somewhere, as once you navigate away from this browser page, the key cannot be seen. This Authentication key is to be used at a later step in the OneConnect configuration.



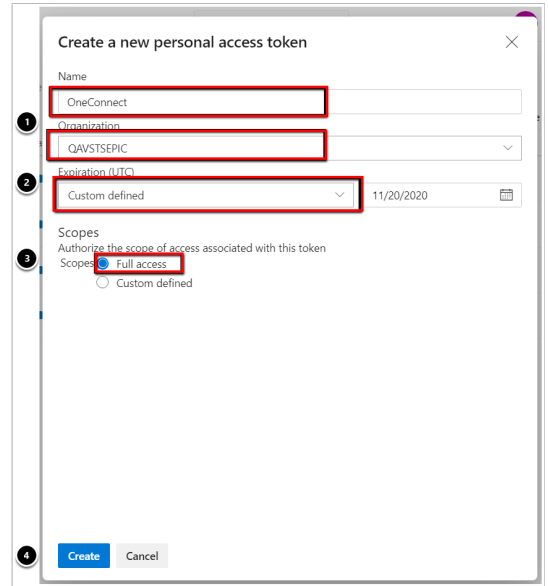
## Azure DevOps Setup

For this integration, you will need to collect the following information from AzureDevOps:

- the Azure DevOps URL
- a Personal Access Token

- Copy and save the root of the URL (i.e. `https://dev.azure.com/Organization`).

2. Generate an Azure DevOps Personal Access Token.
  - a. Go to Azure DevOps.
  - b. On the top right-hand corner, click on **User Settings** and select **Personal Access Tokens**. Once you are redirected to the user settings page, click New Token and fill out the information.
    - Make sure to provide a token name and only allow the token access within the organization you are going to connect in OneConnect.
    - Set the Expiration to be the maximum (Azure DevOps only allows 1 year as the maximum token validity) by selecting **Custom Defined** and select the dates.
    - Set the **Scopes** for the token to **Full Access**.



- c. Click **Create**. After you click Create, you will be provided with the token. Make sure to save the token name, key and expiration date somewhere (notepad, doc, etc.), as once you close the tab, the key will remain hidden. Also, note the expiration date to extend the token once it expires.



**NOTE**

If your Organization does not allow Full Access for any reason, we understand. The integration requires the following permissions at minimum:

Scope Name	Permission Level
Identity	Read and Manage
Work Items	Read, Write, and Manage

**OneConnect Setup**



**NOTE**


To complete the OneConnect setup, you need have Administrator or Editor privileges in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.
2. Navigate to **OnePlan Plans and Azure DevOps - Plans Hierarchy**. Click the **Configure** button. The configuration form will open.




3. Complete the configuration form.

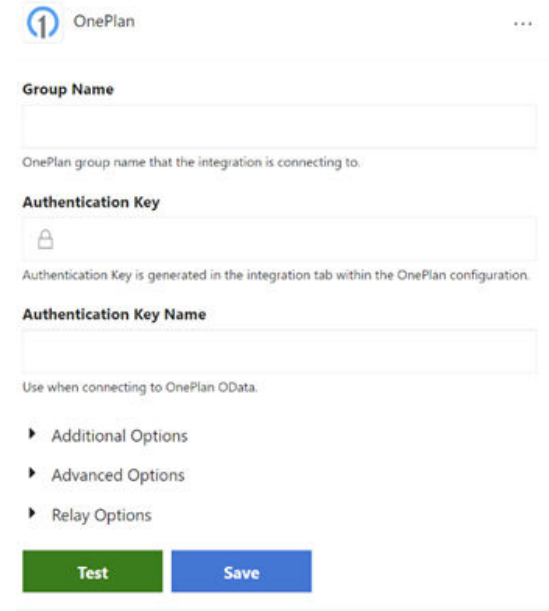
a. Complete the OnePlan section:

 **NOTE**  
Expand the Additional Options area to see all the necessary fields to be filled in.

- **Group Name:** Enter the OnePlan Group name you will be integrating into.
- **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
- **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than `https://my.oneplan.ai`, please enter the appropriate URL here.

 **NOTE**  
Options currently include: `https://au.oneplan.ai`, `https://ca.oneplan.ai`, `https://eu.oneplan.ai`.

- **(Optional) Button Name:** If connecting multiple Azure DevOps organizations to a single OnePlan group, use this field to create a custom name for the Azure DevOps button connecting to the listed Azure DevOps organization.



OnePlan

**Group Name**  
OnePlan group name that the integration is connecting to.


**Authentication Key**  
Authentication Key is generated in the integration tab within the OnePlan configuration.

**Authentication Key Name**  
Use when connecting to OnePlan OData.

▶ Additional Options  
▶ Advanced Options  
▶ Relay Options

Test Save

- b. Click **Next**.
- c. Complete the Azure DevOps section:

 **NOTE**  
Expand the Additional Options area to see all the necessary fields to be filled in.

- **Azure DevOps URL:** Enter the Azure DevOps organization URL (e.g., `https://dev.azure.com/{OrganizationName}`).
- **Azure DevOps Personal Access Token:** Enter the Personal Access Token of the organization that will be integrating into OnePlan.



**Azure DevOps URL**  
e.g., `https://dev.azure.com/{OrganizationName}`

**Personal Access Token**  
Must be a Project Collection Administrator

- **Azure DevOps Plan Level Type:** Enter multiple Azure DevOps work item types that will be brought into OnePlan as Plan level items. Please note that the listed work item types must be nested (i.e., Epics is the parent, Feature is the child to the Epic).

**NOTE**

Please ensure that the hierarchy format matches what is shown in Azure DevOps, if the order is not the same, then the work items will not be brought in.

- **Azure DevOps Work Item Type:** Enter any work item type desired to be imported from Azure DevOps into OnePlan as a Backlog/Task level item.

Azure DevOps Plan Level Type

Epic

Use with either Epics or Plans Hierarchy integrations.

Azure DevOps Work Item Type (Comma Separated)

Feature, User Story, Task, Bug

Use with any OnePlan to Azure DevOps integration.

- **(Optional) Sync ADO team project name to come into OnePlan as parent plan type:** (Default) When unchecked, the Team Project Name is ignored and not brought into OnePlan. If checked, it will be brought into OnePlan as a parent plan type of the plans being imported.
- **(Optional) Bring in Tasks and Bugs that are not in an iteration/sprint:** (Default) When unchecked, only the tasks and bugs that are in a sprint will be brought in. When box is checked, all items will be brought in (even if no sprint is selected).

d. Click **Next**.

## OnePlan Changes After the Integration is Complete

Once the integration is complete, three things will occur in the OnePlan integration page:

- An integration line item is made.
- An integration event is created.
- Azure DevOps is now available in the Connected Systems icon.

## Integration Line Item

Each item within the Integration section shows the OneConnect integrations connected to the OnePlan Work Plan.

Integrations +	
System	List
Azure DevOps	Backlog
Jira	Backlog

## Integration Event

Integration events are automated responses that will bring data over from OnePlan into Azure DevOps. What this event does is trigger the OnePlanPublish strategy for any item that is connected to Azure DevOps. This will bring any values that are mapped to go from OnePlan to Azure DevOps to be updated.

What triggers this event is after a connected item has been saved in OnePlan. At the plan details page, this occurs after an item has been modified and then is automatically saved. At the backlog level, this is done after editing a field, and then clicking Save.

## Connected Systems

Any item that is connected to Azure DevOps will show the Azure DevOps icon at both the My Portfolio page, and for any item in the Work Plan Backlog page for plans and tasks that are connected to Azure DevOps.

To connect an item from OnePlan into Azure DevOps, navigate to the Work Plan - Backlog page, click on the plug icon (Connected Systems Icon) and select the options of connecting to an existing item within Azure DevOps, or creating a new item. Once the plan is connected, the Connected Systems window can also be used to Import, Export, or Open the Azure DevOps Plan level item.

## Azure DevOps Plan Hierarchy Integration - Recommendations and Best Practices

This article describes OnePlan's recommendations and best practices for the Azure DevOps Epics integration.

## Make Work Item Types a Plan Type

In OnePlan, the default Plan Types are: Portfolio, Program, Project, Epic, Objective, Idea, and Key Result. If the Work Item Type is of any other value than the above list, then the plan will be imported, but it will not be imported correctly and might be considered “missing”.

## Set Up the Plan Type

While in OnePlan, navigate to Config > **General** > **Plan Types** > **Add Type**. Add the Work Item Type to the desired hierarchy level. Once complete, feel free to run the OnePlanUpdate strategy against a single plan to verify it worked.



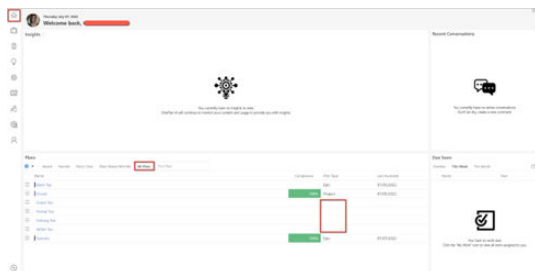
### NOTE

This field is case sensitive, if the values do not match exactly, the plan type field will remain blank.



## My Plan is Missing from My Portfolio

To check if your plan was brought in, go to **Home** > **Plans** > **All Plans**. Type in the name of the plan, if the plan is there, look at the Plan Type column. If it is blank, then you need to manually change this to a valid plan type via the Reorganize button on the left side of the plan name.



## Make the Integration Bi-Directional

### OneConnect

1. The field mappings desired to go in both directions are set correctly (Please do not modify any of the fields marked as Required in the Field Mappings section). To alter this, click on the arrows between the options saved.
2. Add Value Mapping to any values that do not match between Azure DevOps and OnePlan. This is mainly used with Multi-/Choice fields.

### OnePlan

(Task/Backlog) Ensure that any backlog item going back into Azure DevOps has the appropriate **Item Type** selected.

### Multi-Organization Use

We also support multiple Azure DevOps Plans Hierarchy integrations to the same OnePlan group.

Each integration will be connected to a single Azure DevOps Organization.

### Authentication Keys

We highly recommend that each integration is given its own OnePlan Authentication Key.

### Button Name

For syncing purposes, we recommend that each integration be given a unique name. This name will be used to differentiate between the Azure DevOps Organizations when exporting data from OnePlan.

1. Within OneConnect, expand **Additional Options**.
2. Fill out the **Button Name** field that will indicate which Organization you are syncing to.

## Azure DevOps Plan Hierarchy Integration - Default Field Mappings and Scheduled Jobs

This article describes the default field mappings and scheduled jobs for the Azure DevOps Plan Hierarchy integration.

### Default Field Mappings

#### Plans - Plans

OnePlan Field	Azure DevOps Field	Direction	Notes
Name	Title	Both	Required
Team Projects Areas	Area ID	Both	Required
Owner	Assigned To	Both	Required
Portfolio Plan Type	Work Item Type	Both	Required
Portfolio Parent Id	Parent Item ID	Both	Required

### Backlogs - Items

OnePlan Field	Azure DevOps Field	Direction	Notes
Name	Title	Both	Required
Start	Start Date	ADO to OnePlan	
Item Type	Work Item Type	ADO to OnePlan	Required
Due	Finish Date	ADO to OnePlan	
Assigned To	Assigned To	ADO to OnePlan	
Parent Id (Structure)	Parent Item ID	ADO to OnePlan	Recommended

### Lookup Tables - Pickup List Lookup

OnePlan Field	Azure DevOps Field	Direction	Notes
Team Projects Areas (Plan)	Project/ Area Name	ADO to OnePlan	Required

### Default Scheduled Jobs

The following scheduled jobs are installed by default:

- **OnePlanUpdate:** Publish data from Azure DevOps to OnePlan.
- **OnePlanPublish:** Publish data from OnePlan to Azure DevOps.

This strategy has a filter within the **OnePlan - Azure DevOps > Plans – Plans** section. This filter will only sync items that are already mapped to OnePlan. Please talk to your OnePlan Contact about filtering the information being brought into Azure DevOps. If this filter is removed (and not replaced with an alternative filter), all items will be brought into Azure DevOps.

### Optional Strategies

These strategies are available to be scheduled but are not installed by default. Please click on the **Add Schedule** button to see the list of strategies.

- **OnePlanPlanItemsCleanUp:** Deletes OnePlan task/backlog items that have been deleted from Azure DevOps. This does not delete plans from OnePlan.
- **SyncLookupToADO:** Synchronize a list of items from Oneplan to ADO lookup field.

## Azure DevOps Team Projects Integration - Integration Setup

This article explains how to set up the integration between OnePlan and Azure DevOps based on the Team Project.

This integration focuses on synchronizing data between OnePlan and Azure DevOps. Each Team Project within Azure DevOps can be imported into OnePlan as its own plan. Any Work Item Types listed can be brought into OnePlans' Work Plan – Backlog section as tasks.

To set up this integration, you need:

- to have OnePlan and OneConnect approved by an Office365 tenant admin
- to be a OnePlan admin, meaning you are a user with **Owner** permissions in OnePlan
- to be a OneConnect Administrator or Editor in the OneConnect group where you want to set up the integration
- to be an Azure DevOps admin

### OnePlan Setup

For this integration, you need to collect the following information from OnePlan:

- the group name
- an authentication key

- the authentication key name



### NOTE

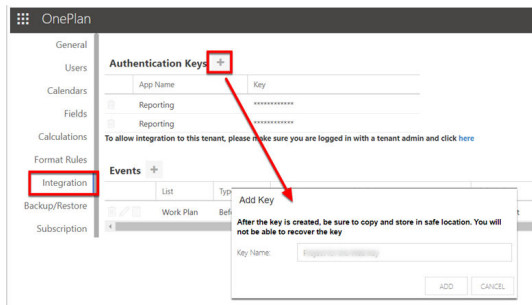
To complete the OnePlan setup, you need to be an admin (user with Owner permissions) in OnePlan.



### NOTE

It is best practice to create a service account to use for the integrations. We strongly recommend setting up an Azure DevOps service account with admin permissions to use in this configuration.

1. Log in to your OnePlan group with your Office365 account.
  2. Open the Admin pages by clicking on the Settings gear.
  3. Select Integration in the admin navigation.
  4. Click the + (plus) icon in the Authentication Keys section.
  5. Save the key name and generated key somewhere, as once you navigate away from this browser page, the key cannot be seen. This Authentication key is to be used at a later step in the OneConnect configuration.
1. Copy and save the root of the URL (i.e. https://dev.azure.com/Organization).
  2. Generate an Azure DevOps Personal Access Token.
    - a. Go to Azure DevOps.
    - b. On the top right-hand corner, click on **User Settings** and select **Personal Access Tokens**. Once you are redirected to the user settings page, click New Token and fill out the information.
      - Make sure to provide a token name and only allow the token access within the organization you are going to connect in OneConnect.
      - Set the Expiration to be the maximum (Azure DevOps only allows 1 year as the maximum token validity) by selecting **Custom Defined** and select the dates.
      - Set the **Scopes** for the token to **Full Access**.



## Azure DevOps Setup

For this integration, you will need to collect the following information from Azure DevOps:

- the Azure DevOps URL
- a Personal Access Token





**NOTE**

If your Organization does not allow Full Access for any reason, we understand. The integration requires the following permissions at minimum:

Scope Name	Permission Level
Identity	Read and Manage
Project and Team	Read, Write, and Manage
Security	Manage
Work Items	Read, Write, and Manage

**OneConnect Setup**



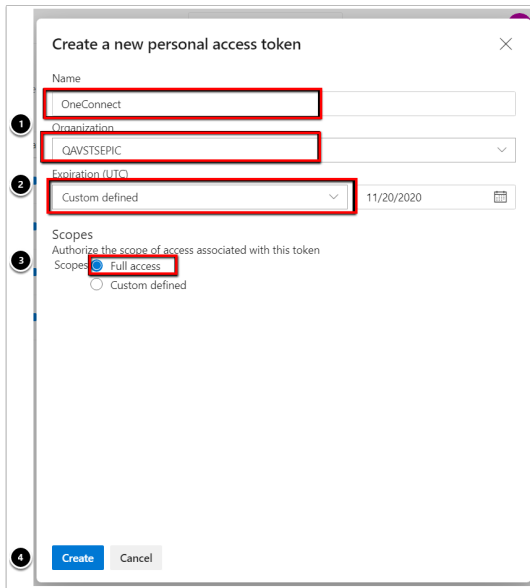
**NOTE**

To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.
2. Configure the following integration: OnePlan Plans and Azure DevOps Plans Hierarchy. Click the Configure button.



3. Complete the integration configuration form.
  - a. Complete the OnePlan section.
    - **Group Name:** Enter/paste the OnePlan Group name from the earlier OnePlan Setup steps.
    - **Authentication Key:** Enter/paste the OnePlan Authentication Key that you saved from the earlier OnePlan Setup steps.
    - **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than <https://my.oneplan.ai>, please enter the appropriate URL here.



- c. Click **Create**. After you click Create, you will be provided with the token. Make sure to save the token name, key and expiration date somewhere (notepad, doc, etc.), as once you close the tab, the key will remain hidden. Also, note the expiration date to extend the token once it expires.



**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

- **(Optional) Button Name:** If connecting multiple Azure DevOps organizations to a single OnePlan group, use this field to create a custom name for the Azure DevOps button connecting to the listed Azure DevOps organization.
- **(Optional) OnePlan Default Plan Type:** This is to be used in replace

of the Portfolio Plan Type field mapping, should one not be provided automatically within the integration. This is to provide a default plan type for any plan level work items that are brought into OnePlan. A single value should be entered.

**Group Name**  
OnePlan group name that the integration is connecting to.

**Authentication Key**  
Authentication Key is generated in the integration tab within the OnePlan configuration.

**Authentication Key Name**  
Use when connecting to OnePlan OData.

- ▶ Additional Options
- ▶ Advanced Options
- ▶ Relay Options

**Test** **Save**

- b. Click the **Next** button.
- c. Complete the Azure DevOps section.

**NOTE**  
Expand the Additional Options tab to see all necessary fields for the integration.

- **Azure DevOps URL:** Enter in the Azure DevOps Organization URL (e.g. `https://dev.azure.com/{OrganizationName}/`).
- **Azure DevOps Personal Access Token:** Enter the Personal Access Token the organization that will be integrating with OnePlan.

**Azure DevOps URL**  
e.g. `https://dev.azure.com/{OrganizationName}`

**Personal Access Token**  
Must be a Project Collection Administrator

- **Azure DevOps Work Item Type (Comma Separated):** Enter any work item type desired to be imported from Azure DevOps into OnePlan as a Backlog/Task level item.

**Azure DevOps Work Item Type (Comma Separated)**  
Epic, Feature, User Story, Task, Bug  
Use with either Epics or Plans Hierarchy integrations.

- **(Optional) Bring in Tasks and Bugs that are not in an iteration/sprint:** (Default) When unchecked, only the tasks and bugs that are in a sprint will be brought in. When box is checked, all items will be brought in (even if no sprint is selected).

d. Click **Next**.

### OnePlan Changes After the Integration is Complete

Once the integration is complete, three things will occur in the OnePlan integration page:

- An integration line item is made.
- An integration event is created.
- Azure DevOps is now available in the Connected Systems icon.

### Integration Line Item

Each item within the Integration section shows the OneConnect integrations connected to the OnePlan Work Plan.

System	List
Azure DevOps	Backlog
Jira	Backlog

### Integration Event

Integration events are automated responses that will bring data over from OnePlan into Azure DevOps. What this event does is trigger the OnePlanPublish strategy for any item that is connected to Azure DevOps. This will bring any values that are mapped to go from OnePlan to Azure DevOps to be updated.

What triggers this event is after a connected item has been saved in OnePlan. At the plan details page, this occurs after an item has been modified and then is automatically saved. At the backlog level, this is done after editing a field, and then clicking **Save**.

### Connected Systems

Any item that is connected to Azure DevOps will show the Azure DevOps icon at the My Portfolio page.

To connect an item from OnePlan into Azure DevOps, navigate to the Work Plan - Backlog page, click on the plug icon (Connected Systems Icon) and select New Item to create that Project within Azure DevOps. Once the plan is connected, the Connected Systems window can also be used to Import, Export, or Open the Azure DevOps Plan level item.

## Azure DevOps Team Projects Integration - Default Field Mappings and Scheduled Jobs

This article describes the default field mappings and scheduled jobs when you install the Azure DevOps Team Projects to OnePlan Plans integration.

### Default Field Mappings

#### Plans - Team Projects

OnePlan Fields	Azure DevOps Fields	Direction	Notes
Name	Project Name	Both	Required
Owner	Owner	Both	Required

#### Backlog - Items

OnePlan Fields	Azure DevOps Fields	Direction	Notes
Name	Title	Both	Required
Parent Id (Structure)	Parent ID	Both	Recommended
Assigned To	Assigned To	Both	Required
Item Type	Work Item Type	Both	Required

OnePlan Fields	Azure DevOps Fields	Direction	Notes
Start	Start Date	ADO to OnePlan	
Due	Finish Date	ADO to OnePlan	
Points	Story Points	ADO to OnePlan	

### Lookup Tables – Pick List Lookup

OnePlan Fields	Azure DevOps Fields	Direction	Notes
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This table is intentionally left empty. Only choice fields should be mapped in this table to run the SyncLookupToADO strategy.

### Default Scheduled Jobs

The following scheduled jobs are installed by default:

- **OnePlanUpdate:** Publish data from Azure DevOps to OnePlan.
- **OnePlanPublish:** Publish data from OnePlan to Azure DevOps.

### Optional Strategies

These strategies are available to be scheduled but are not installed by default. Please click on the **Add Schedule** button to see the list of strategies.

- **OnePlanPlanItemsCleanUp Deletes:** OnePlan task/backlog items that have been deleted from Azure DevOps. This does not delete plans from OnePlan.
- **SyncLookupToADO:** Synchronize a list of items from Oneplan to ADO lookup field.

## Azure DevOps Team Projects Integration - Recommendations and Best Practices

This article describes OnePlan's recommendations and best practices for the Azure DevOps Team Projects integration.

### Choose a Plan Type for Team Projects

Please note that at this time, Team Projects will be brought into OnePlan without a plan type due to the varied expectations of all our clients.

It is highly encouraged that a **Default OnePlan Plan Type** be entered within the OnePlan Connector for those items to be found within the My Portfolio page.

To change the plan type for the Team Project, go to the **Home Icon** > and underneath the **Plans** section, click on **All Plans**. From here, locate the hamburger icon on the left side of the plan in question (it should have a blank Plan Type), and select **Reorganize**. A new window will appear, and the plan type can be selected from there.

### **Multi-Organization Use**

We also support multiple Azure DevOps Team Projects integrations to the same OnePlan group.

Each integration will be connected to a single Azure DevOps Organization.

### **Authentication Keys**

We highly recommend that each integration is given its own OnePlan Authentication Key.

### **Button Name**

For syncing purposes, we recommend that each integration be given a unique name. This name will be used to differentiate between the Azure DevOps Organizations when exporting data from OnePlan.

1. Within OneConnect, expand Additional Options.
2. Fill out the **Button Name** field that will indicate which Organization you are syncing to.

# Azure Active Directory Integration

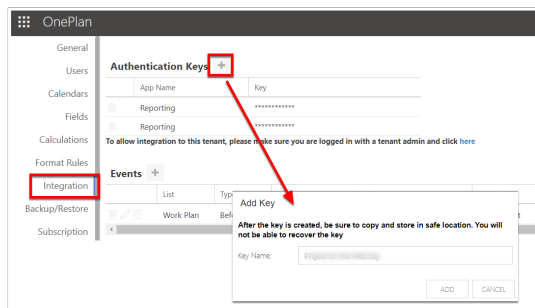
## Azure Active Directory to OnePlan Resource Center Integration - Integration Setup

This article explains how to set up the Azure Active Directory to OnePlan Resource Center integration.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### Enable OnePlan App Permissions

These steps will require action from the client's Tenant Administrator to enable app permissions and consent.

1. Log into your OnePlan group using your Office365 account.

2. Open the Admin pages by clicking on the Settings (gear) icon.
3. Select Users on the Admin Navigation panel.
4. Expand the AD Synchronization section.
5. At the bottom of the section, locate: **To Synchronize users, you must enable app permissions: here**. Click on the blue here button to allow the tenant administrator to grant permissions.



#### NOTE

The Tenant Administrator will have to provide their Tenant Credentials to approve the app permissions.

6. After enabling the app permissions, navigate to <https://my.oneplan.ai/account/ConsentIntegration> to provide admin consent for the specific OnePlan Group.



#### NOTE

The Tenant Administrator will have to provide their Tenant Credentials to approve the app permissions.

### OneConnect Setup

To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.
2. Navigate to **Azure AD Users to OnePlan**. Click the **Configure** button. The integration configuration form will open.



Azure AD Users to OnePlan  
Sync data from Azure AD Users to OnePlan Resources

Configure

3. Complete the Azure AD Users to OnePlan integration configuration form.
  - a. Complete the Azure AD section.

**NOTE**

Expand the **Additional Options** heading to see all the necessary fields to be filled in.

- **Tenant Domain:** This is the URL for the tenant organization, this can be found in Azure Active Directory > Overview > Primary Domain URL (i.e., *TenantName.onmicrosoft.com*).
- **Authorize (Button):** This can be used as an alternative to creating a Client Id and Client Secret. A Tenant Administrator will have to enter their credentials on behalf of the Organization for the permissions to work.
- **(Optional) Client Id:** This is the Azure App Id that will be generated by the Tenant Administrator within the client's organization. This can be used in place of the Authorize button.
- **(Optional) Client Secret:** This is the Azure App Secret that will be generated by the Tenant Administrator within the client's organization. This can be used in place of the Authorize button.
- **(Optional) Azure AD Group:** Enter the group name(s) that will be synced over into OnePlan from Azure AD.

**NOTE**

This field is case sensitive.

- Click **Next**.
- Complete the OnePlan section.
  - **Group Name:** Enter the OnePlan Group name you will be integrating into.
  - **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
  - **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment to <https://my.oneplan.ai>, please enter the appropriate URL here.

**NOTE**

Options currently include <https://au.oneplan.ai>, <https://ca.oneplan.ai>, and <https://eu.oneplan.ai>.

d. Click **Next**.

Given Name	Surname	Department	Job Title
Employee Id	Employee Hire Date (Date)	Account Enabled (YesNo)	Is Resource Account
City	State	City	Street Address
Postal Code	Country	Mobile Phone	Hire Date (Date)
User Type (Dropdown)	User Principal Name	Inactive (YesNo)	Office Location
Mail Nickname	Preferred Language	Sign in Sessions Valid From Date Time (Date)	Employee Leave Date Time (Date)
Created Date Time (Date)	Fax Number	Age Group (Dropdown)	

## Azure Active Directory to OnePlan Resource Center Integration - Default Field Mappings and Scheduled Strategies

This article explains the AzureActive Directory to OnePlan Resource Center default field mappings and scheduled jobs for your integration.

### Default Field Mappings Users - Resources Section

Azure AD Fields	OnePlan Fields	Direction	Notes
Display Name	Display Name	Azure AD to OnePlan	Suggested
Mail	Email	Azure AD to OnePlan	Required

### Default Scheduled Strategies

**SyncAzureResources:** This strategy synchronizes Resources from Azure AD to OnePlan Resources.

### Additional Azure AD Fields Available to Synchronize into OnePlan

The fields in Azure Active Directory that are readily available to be brought into OnePlan are:

Display Name	Mail	Company Name	Employee Name
--------------	------	--------------	---------------

An additional step to create a corresponding field within the OnePlan Resource Center is necessary to map to the available fields in Azure AD. This can be done within the OnePlan Configuration page > **Fields > Resources**.

### Mapping to OnePlan’s Inactive Field

When mapping to OnePlan’s Inactive field, please map this to the Azure AD’s Inactive field.

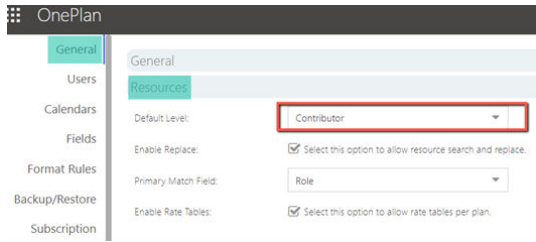
## Azure Active Directory to OnePlan Resource Center Integration - Setting Permission Levels for New Resources

When bringing in a new resource into the OnePlan Resource Center, that resource (if they are not generic) will have to have a permission level set.

By default, the permission level for all new resources coming into OnePlan will be assigned the permission level of **Contributor**.

If you would like to change the default permission level for all new resources coming into OnePlan, within OnePlan, navigate to Admin/configuration pages > **General > Resources**. Choose a permission level from the **Default Level** drop-down. The Default Level chosen from this drop-down will apply to all resources coming into OnePlan from that point forward until the value has been altered.





**NOTE**

Changing the **Default Level** value will not alter any resources currently existing within OnePlan.



**WARNING**

Changing the **Default Level** value can impact Team Member Licenses. Please check in with your OnePlan representative to ensure that licenses are not mistakenly allocated.

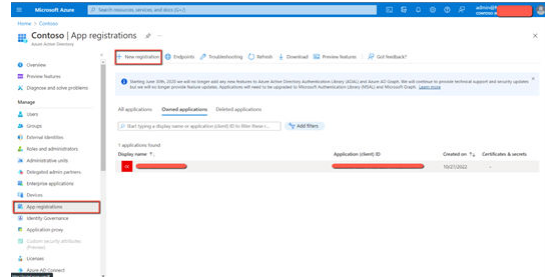
## Azure Active Directory Modern Authentication

Only the tenant administrator may be able to set up the Modern Authentication for the Azure AD integration. If you wish to locate the SharePoint/ Tabular Data documentation, or even the Project Online documentation, please navigate to the SharePoint Modern Authentication page, or to Project Online Modern Authentication page.

### Create the App Registration within Azure

1. While logged in as a tenant admin for the client's organization, log in to [portal.azure.com](https://portal.azure.com).
2. Navigate to the Azure Active Directory (Azure AD).
3. Within the left navigation bar, go into the **App Registrations** page.

4. On the top Left of the page, create a **New Registration**.
  - **Name:** Give the App Registration Name a title.
  - **Supported Account types:** Single Tenant.
  - **Redirect URI (Optional):** Dropdown: Web. URL: <https://my.oneplan.ai>.



5. Click **Register**.
6. Once the registration has been completed, the **App Registration** page will load. Within the **Essentials** section, the **Application (client) ID** can be found.



7. On the navigation panel on the left, click on **Certificates & Secrets**.
8. Towards the middle-left of the page, click on + **New Client Secret**. The **Add a Client Secret** panel will expand on the right side of the browser.



**NOTE**

This is where a **Description** and the **Expiration Date** can be set according to the company's policy.

9. Click **Add**. The panel will close, and the Client Secret will be in the middle of the page underneath the column labelled as **Value**.



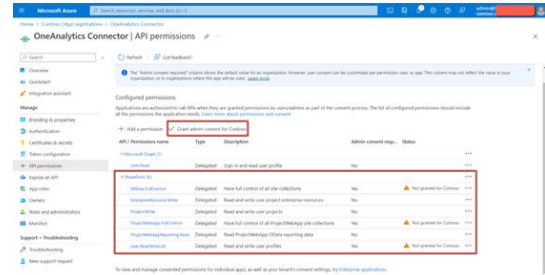
## NOTE

Please note that this value will only appear once, it is encouraged to save this value in a secure location should you need it a second time. Otherwise, it is best practice to create a whole new client secret for each time it is needed.



## Set API Permissions

- Once finished with the setting up the Client Secret, navigate to the API Permissions page (left navigation panel, beneath Manage).
- Select **Add A Permission**.
- Beneath the Microsoft APIs tab, select **Microsoft Graph**.
- What type of permissions does your application require? Select **Application Permissions**.
- In the dropdown selections, choose these permission levels:
  - User.Read.All
  - Group.Read.All
  - GroupMember.Read.All
- Once the Permission levels have been selected, click **Add Permissions**.
- In the API Permissions page, click **Grant Admin consent for {Tenant Name}**.
- Click on **Yes** for the consent confirmation popup.



## OneConnect Setup

- While logged into OneConnect, go to the **Azure AD Users to OnePlan** integration.
- In the Azure AD setup page, type in the Primary Domain URL. This can be found in Azure AD Overview Page (i.e., *{TenantName}.onmicrosoft.com*).
- Type in the Client Id and Client Secret.
- Click test to confirm that the connection works as intended. If there is a Connected Successfully notification at the top right of the browser page, proceed to click on **Save**.

# SharePoint Integration

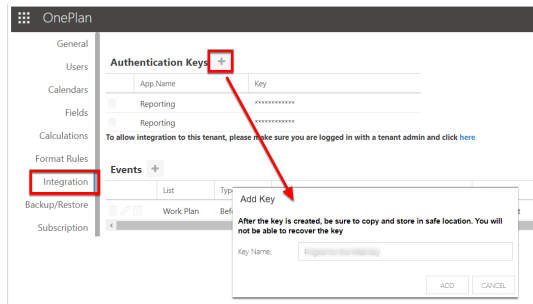
## SharePoint Lists to OnePlan Plans

This article explains how to set up an integration for SharePoint list items to become plans in OnePlan.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

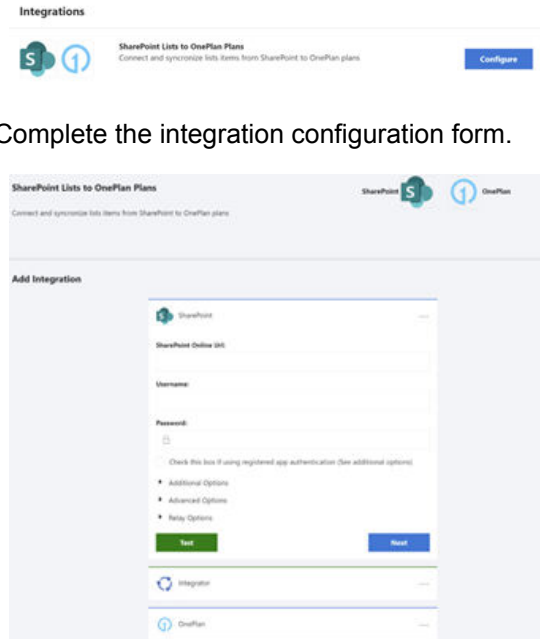
1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### OneConnect Setup

1. Go to <https://my.oneconnect.ai>
2. Click on the SharePoint to OnePlan integration tile. Click on the **Configure** button to the right of the SharePoint Lists to OnePlan Plans.

3. Complete the integration configuration form.



- a. Complete the SharePoint section



#### NOTE

Expand the **Additional Options** section to see all necessary fields for this integration.

- **SharePoint Online URL:** This will be the SharePoint Site where the List is located (eg. <https://or123.sharepoint.com/sites/siteName>).

**NOTE**

Currently, we do not support SharePoint Server.

- **Username + Password:** If your company wishes to use basic authentication, please input the credentials of the user who has access to this SharePoint site.
- **Check this box if using registered app authentication:** If basic authentication is not secure enough for your organization, see [Set Up SharePoint Modern Authentication \[118\]](#) to set up a Client ID + Secret. This box must be checked, and Client ID + Secret (located in Additional Options) must be made in SharePoint for these credentials to work.
- **Client ID + Secret:** To be used with the checkbox above.

- **Please Specify all SharePoint list names to be synchronize (Comma separated):** This is where the names of any and all lists are entered that will be brought into OnePlan. The names need to match the front-end name of the list that will be brought over. To find the front-end name of the list, go to the SharePoint Site > **Settings icon** > click **Site Contents**. The list name on this page is what is typed in this box. Not the individual item name in each list.
- **Check this box if only single list specified:** If only one list is going to be brought into OnePlan, check this box.
- **Email Copy To:** To include someone else that is not already being notified of this integration status, enter the email here.

- Click **Next**.
- Complete the OnePlan section.

- **OnePlan Group Name:** Enter/paste the OnePlan app name from the earlier OnePlan Setup steps.
- **OnePlan Authentication Key:** Enter/paste the OnePlan Key that was saved from the earlier OnePlan Setup steps.
- **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.



**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

- d. Click **Next**.

**Integration Information**

**Scheduled Jobs**

The following scheduled jobs are installed by default.

- SharePointToOnePlan
  - This strategy syncs Projects from SharePoint to OnePlan
- SynchLookups
  - Sync list from SharePoint to OnePlan

**Field Mappings**

**Table 1. Default Mappings**

SharePoint Fields	OnePlan Fields	Direction	Notes
Title	Name	Both	Required
SP List ID	SP List Name	Both	

**Table 2. Recommended Field Mappings**

SharePoint Field	OnePlan Field	Direction	Notes
Custom Column Name	Portfolio Plan Type	SharePoint to OnePlan	Highly Recommended

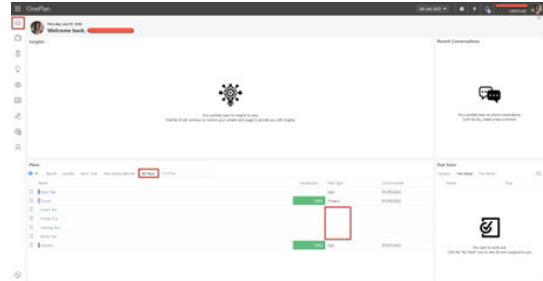
We highly recommend that a column be made within SharePoint list (Text or Choice) and in that column, have the name of the plan type desired be listed. The out of the box options are Portfolio, Program, Project, and Epic.

If the SharePoint list is brought into OnePlan without this field mapping, the list items will not appear in My Portfolio, however, the list items will be located at Home > Plans section > click **All Plans**.

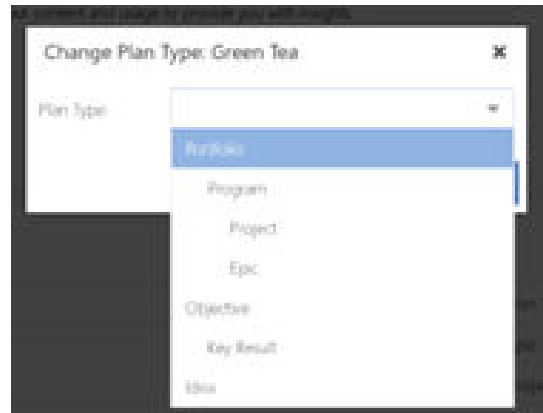
**Previously Imported SharePoint Lists Not Showing in My Portfolio**

If the SharePoint list items have already been imported into OnePlan and are not visible in My Portfolio, these steps can have the SharePoint list item show in My Portfolio:

1. Going to Home Page. In the bottom left panel labelled Plans, click on the **All Plans** tab to see all plans that are created.



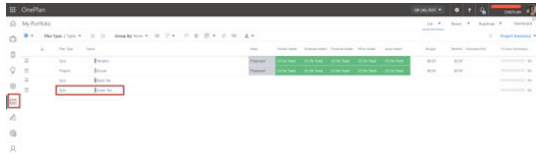
2. Click on the Hamburger icon on the left of the plan name and select **Reorganize**. A new window will appear.



3. Select the Plan Type desired. Then click **Reorganize**.



4. The Plan item will now appear in My Portfolio.



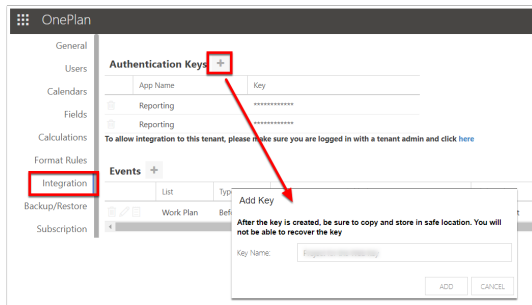
## SharePoint Lists to OnePlan Tasks

This article explains how to set up an integration for SharePoint list items to become tasks within OnePlan plans.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.

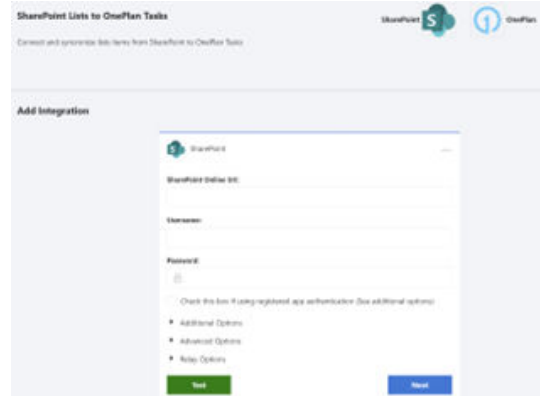


### OneConnect Setup

1. Go to <https://my.oneconnect.ai>
2. Click on the SharePoint to OnePlan integration tile. Click on the **Configure** button to the right of the SharePoint Lists to OnePlan Tasks.



3. Complete the integration configuration form.

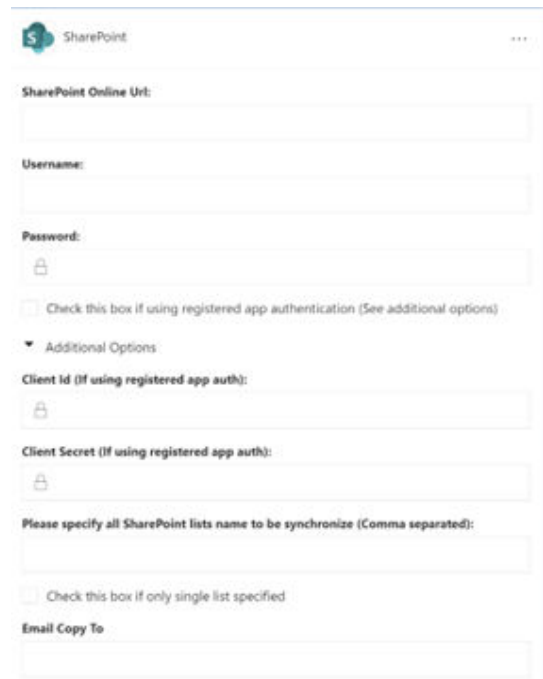


- a. Complete the SharePoint section



#### NOTE

Expand the **Additional Options** section to see all necessary fields for this integration.



- **SharePoint Online URL:** This will be the SharePoint Site where

the List is located (eg. https://or123.sharepoint.com/sites/sitename).



**NOTE**

Currently, we do not support SharePoint Server.

- **Username + Password:** If your company wishes to use basic authentication, please input the credentials of the user who has access to this SharePoint site.
- **Check this box if using registered app authentication:** If basic authentication is not secure enough for your organization, see [Set Up SharePoint Modern Authentication \[118\]](#) to set up a Client ID + Secret. This box must be checked, and Client ID + Secret (located in Additional Options) must be made in SharePoint for these credentials to work.
- **Client ID + Secret:** To be used with the checkbox above.
- **Please Specify all SharePoint list names to be synchronize (Comma separated):** This is where the names of any and all lists are entered that will be brought into OnePlan. The names need to match the front-end name of the list that will be brought over. To find the front-end name of the list, go to the SharePoint Site > **Settings icon** > click **Site Contents**. The list name on this page is what is typed in this box. Not the individual item name in each list.
- **Check this box if only single list specified:** If only one list is going to be brought into OnePlan, check this box.
- **Email Copy To:** To include someone else that is not already being notified of this integration status, enter the email here.

- b. Click **Next**.
- c. Complete the OnePlan section.

- **OnePlan Group Name:** Enter/paste the OnePlan app name from the earlier OnePlan Setup steps.
- **OnePlan Authentication Key:** Enter/paste the OnePlan Key that was saved from the earlier OnePlan Setup steps.
- **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.



**NOTE**

Options currently are:  
 https://au.oneplan.ai,  
 https://ca.oneplan.ai,  
 https://eu.oneplan.ai

- d. Click **Next**.

**Integration Information**

**Scheduled Jobs**

The following scheduled jobs are installed by default.

- SharePointToOnePlanTasks
  - This strategy syncs Projects from SharePoint to OnePlan
- SynchLookups
  - Sync list from SharePoint to OnePlan

**Field Mappings**

SPList(s) to Tasks



**Table 3. Default Mappings**

SharePoint Fields	OnePlan Fields	Direction	Notes
Title	Name	Both	Required

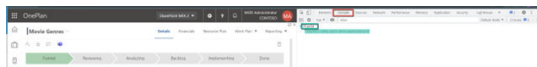
SPList(s) to Tasks

**Table 4. Required Field Mapping**

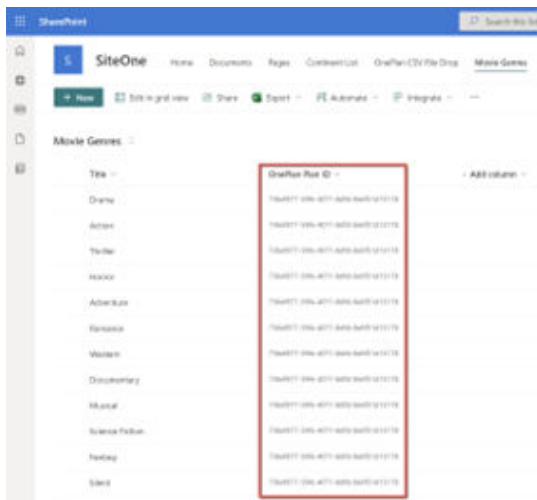
SharePoint Field	OnePlan Field	Direction	Notes
Custom Column Name	Plan Id	Both	Required

OneConnect does not have the ability to know where to assign the SharePoint list items automatically. Because of this, a custom text column needs to be made in SharePoint, and within that column, the OnePlan Plan Id. Having this field mapping will allow the SharePoint list items to come over into OnePlan as a Schedule item within the Work Plan.

To find the OnePlan Plan Id, open the Plan Details section of the plan in question, go into the Console Log of your browser, type PlanId, and press Enter. The unique plan id will appear.



Copy and paste the Plan Id into the SharePoint Plan Id Column that was created.



## Set Up SharePoint Modern Authentication

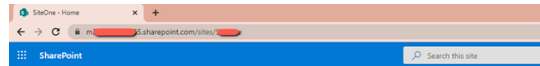
This article describes how to set up Modern Authentication for SharePoint to use with integration configurations, like Tabular Data.



### IMPORTANT

The user setting up Modern Authentication must be a Global Admin (Tenant Admin) as well as the Site Collection Admin.

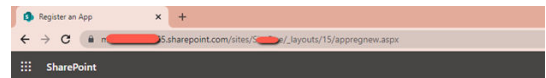
1. Go to your SharePoint Site URL. You will need this Url for integration configurations, such as the Tabular Data integration. This URL will usually follow the format of `https://[tenantName].sharepoint.com/sites/[siteName]`



### NOTE

This URL will be used in the OneConnect Integration.

2. Register a SharePoint add-in (app) using the AppRegNew form and grant the API permissions.
  - a. Register the Add-in using the AppRegNew Form. Go to `[TenantSharePointSite]/_layouts/15/AppRegNew.aspx`



The page will look like this:



- **Client ID:** Click on the Generate button to be given a custom GUID.


- **Client Secret:** Click on the Generate button to be given a unique secret.
- **Title:** The name of your add-in that will be displayed to the end user.
- **App domain:** The domain where the add-in is hosted. In this example, I used my.oneconnect.ai (NO SLASHES / OR https:)

 **NOTE**  
If you use www.oneconnect.ai an error when testing the integration connection will pop up saying "Microsoft.IdentityMode.I.SecurityTokenService.Requ.... Token request failed."

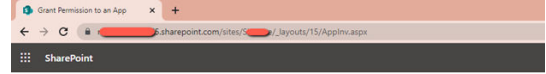
- **Redirect URL:** For token generation. In this example, I used https://my.oneconnect.ai



- Click **Create**. A new page will show giving the user the Client ID, Client Secret, Title, App Domain, and Redirect URL. Save the Title, Client ID and Client Secret for future use. These will be needed for the next step, and for the OneConnect Integration.

 **NOTE**  
The client id and client secret are linked to individual OneDrive URLs.

- To grant API Permissions. Go to [TenantSharePointSite]/\_layouts/15/AppInv.aspx



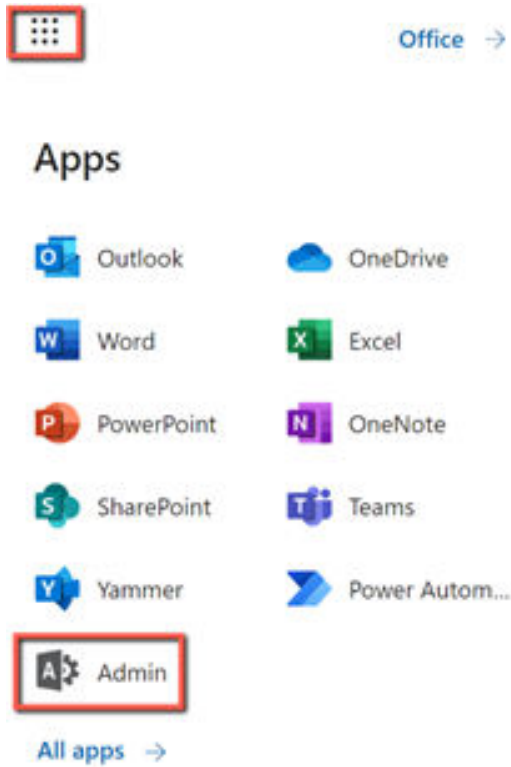
- **App Id:** Enter the client Id.
- **Title:** Enter the title used in the AppRegNew form
- **App domain:** The domain where the add-in is hosted. In this example, I used my.oneconnect.ai (NO SLASHES / OR https:)
- **Redirect URL:** For token generation. I used https://my.oneconnect.ai
- **Permission Request XML:** Enter the following code to grant full control:

```
<AppPermissionRequests
AllowAppOnlyPolicy="true">
<AppPermissionRequest
Scope="http://sharepoint/content/sitecoll
Right="FullControl"/>
<AppPermissionRequest
Scope="http://sharepoint/content/sitecoll
Right="FullControl"/>
</AppPermissionRequests>
```



- After you click **Create** you will be prompted to trust the add-in. Click **Trust It**.
- To check if the permissions have been applied, go to [TenantSharePointSite]/\_layouts/15/appprincipals.aspx

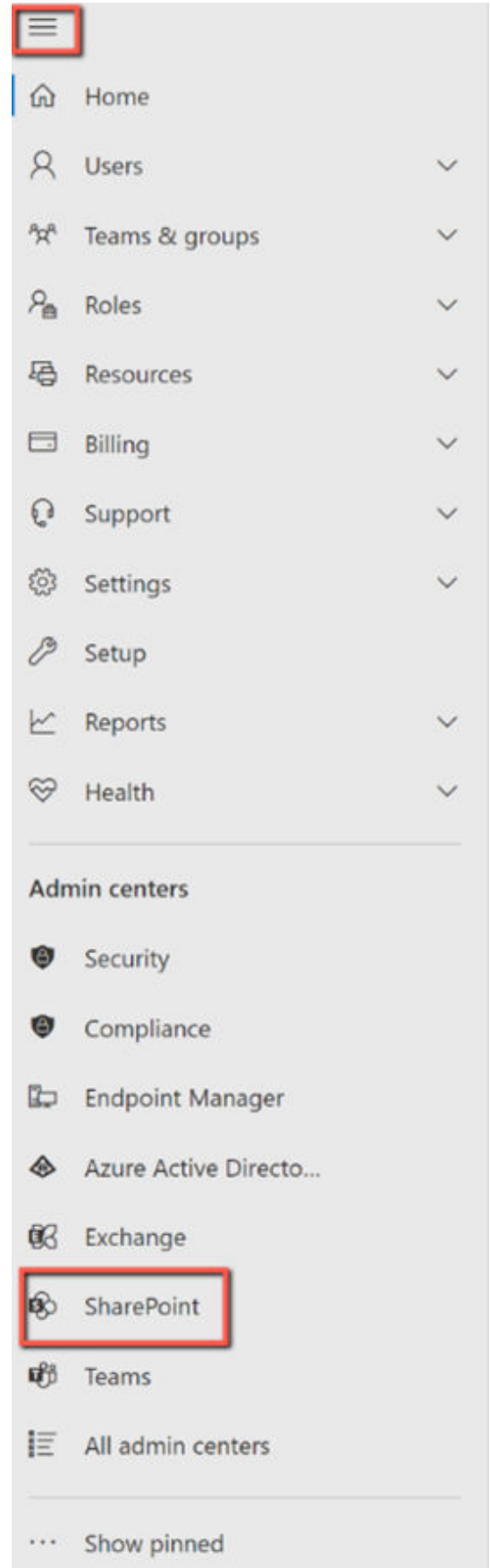
- f. The XML code grants you 2 full control permissions on a site collection and full control on a web. See [Available scopes and permissions, and restrictions on Office Store apps permissions](#) from Microsoft for a detailed description of other options.
- 3. If integration is made, however when looking at the field mappings page shows an error of 401 Unauthorized, that means that the Tenant is on the newer side. To fix this:
  - a. At SharePoint site, click on the top right waffle icon, and click on **Admin**. This will bring up the Microsoft 365 Admin Center.



The Microsoft 365 Admin URL will be similar to this:



- b. In the Microsoft 365 Admin Center, click on the hamburger icon on the top left of the page to expand the Navigation bar, and click on the three dots labeled **Show All**. This will bring additional navigational items into the view. Click on **SharePoint** option. This will open the SharePoint Admin Center page.



The SharePoint Admin URL will be similar to this:

- c. On the desktop of the computer. Open Windows PowerShell with Administrator Privileges. In the Windows PowerShell paste these commands and press **Enter** after each command:
  - i. `Get-Module -Name Microsoft.Online.SharePoint.PowerShell -ListAvailable | Select Name,Version`
  - ii. `Install-Module -Name Microsoft.Online.SharePoint.PowerShell`
    - A. If this is your first time using Windows PowerShell, you will get two Notifications, the first: “NuGet Provider is required to continue”. Read the notification. Type “Y” and press **Enter**.
    - B. The second notification will say “Untrusted repository”. Read the notification. Type “Y” and press **Enter**.
  - iii. `Install-Module -Name Microsoft.Online.SharePoint.PowerShell -Scope CurrentUser`
  - iv. `Update-Module -Name Microsoft.Online.SharePoint.PowerShell`
  - v. `Connect-SPOService -Url [SharePoint Admin Site] -Credential [Admin Credentials]`
    - A. Replace the [SharePoint Admin Site] with the SharePoint Admin URL (from step 3b) that will match this format: [TenantSite-admin.sharepoint.com]
    - B. Replace [Admin Credentials] with the Global Administrator/Tenant Administrator username.
    - C. A notification will appear asking “Do you want to run software from this untrusted publisher?”. Read the notification. Type “A” and press Enter.

- vi. `Set-SPOTenant -DisableCustomAppAuthentication $true`
- vii. `Set-SPOTenant -DisableCustomAppAuthentication $false`

- d. Once all the commands have been entered successfully, close windows PowerShell, and wait 15 minutes, then check in OneConnect if the field mappings show up when refreshed. For the official Microsoft documentation on the Windows PowerShell instructions: <https://docs.microsoft.com/en-us/powershell/sharepoint/sharepoint-online/connect-sharepoint-online>

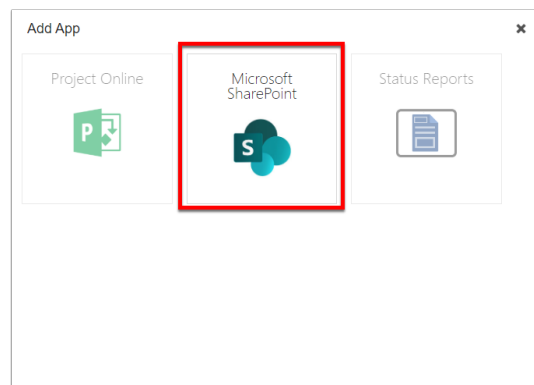
## Install and configure the Microsoft SharePoint App

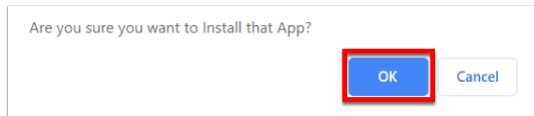
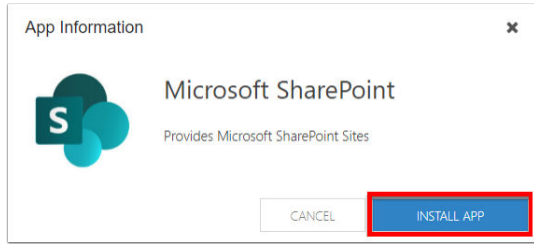
This article explains how to install and configure the Microsoft SharePoint App in OnePlan, which allows the creation of individual SharePoint sites/workspaces for plans.

### Install Microsoft SharePoint App

Install the app Microsoft SharePoint. See [How do I add apps?](#) to install an app in OnePlan.

After the app is installed, a new settings section called Microsoft SharePoint in the admin navigation.

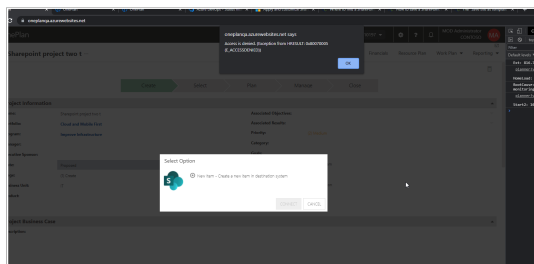




### Permissions

See [Allow or prevent custom script - SharePoint in Microsoft 365 | Microsoft Docs](#) to allow users permission to connect a new item in SharePoint with OnePlan.

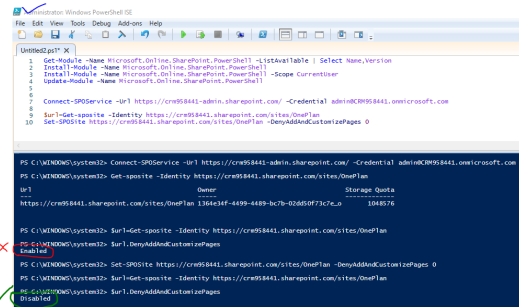
**NOTE:** Users may run into an "Access is Denied" error when connecting a new item in SharePoint with OnePlan.



To resolve the error:

1. Open Windows ISE in Admin privilege.
2. Install the SharePoint modules.
3. Connect to the SP Online admin center.
4. Execute the following cmdlet to disable the restriction:

```
Set-SPOsite https://crm958441.sharepoint.com/sites/OnePlan -DenyAddCustomizePages 0
```

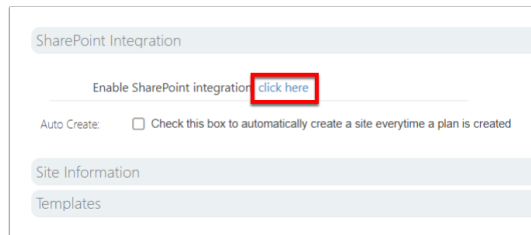


See [To allow custom script on other SharePoint sites](#) for more information.

### SharePoint Integration Settings

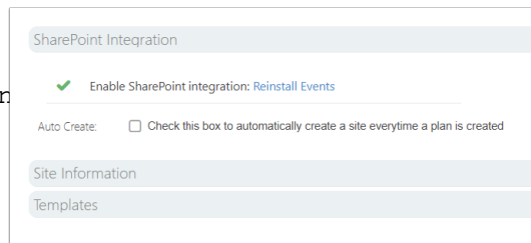
Navigate to the **Microsoft SharePoint** admin page. Expand the **SharePoint Integration** heading section.

Click the link to enable the SharePoint integration. The page will refresh, and you will need to navigate back to this page.



After enabled, a green check mark is shown.

**Auto Create:** Select the check box to automatically create a site/workspace every time a new plan is created. If left unselected/unchecked, users will be able to create a site for a plan as needed.



### Site Information

Expand the **Site Information** heading section.

Enter your **SharePoint Site Collection URL**. Each site for this OnePlan group will be created as a subsite in that site collection.

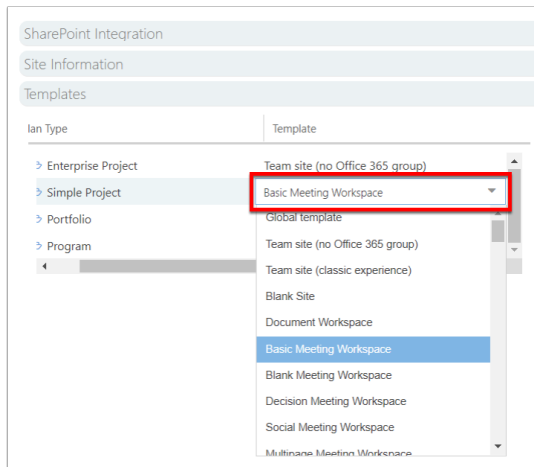
Enter the **username** and **password** of the Service Account in the SharePoint site.

You need to refresh your browser to kick off the authentication. This is needed the first time entering username & password, as well as if you update the password in the future. Then, proceed to the next section for the Templates.

### Templates

Expand the **Templates** heading section. Each plan type in your OnePlan Group will be listed. You may have a different template selected per plan type.

The content, lists, libraries, and settings in the workspace templates will determine what will be in the plan workspaces upon creation. You may create new and/or modify the existing templates in your SharePoint site collection, which will show them available for selection. Such as add lists, configure the web parts, add content, etc.

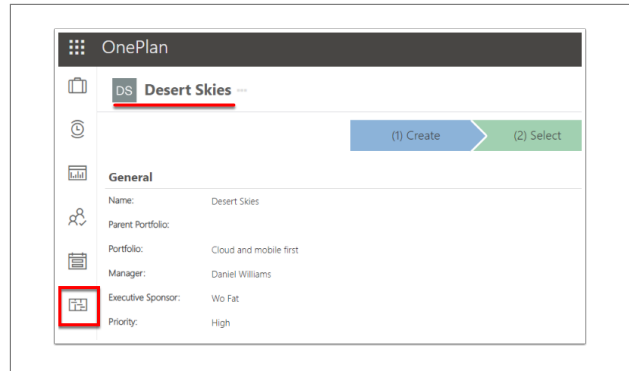


## Use SharePoint workspaces

This article explains how to use SharePoint workspaces with OnePlan. This functionality requires the app Microsoft SharePoint be installed and configured by your admin. Based on settings, a SharePoint workspace may be auto-created upon creation of your plan. Or, a SharePoint workspace may be created manually as needed per plan.

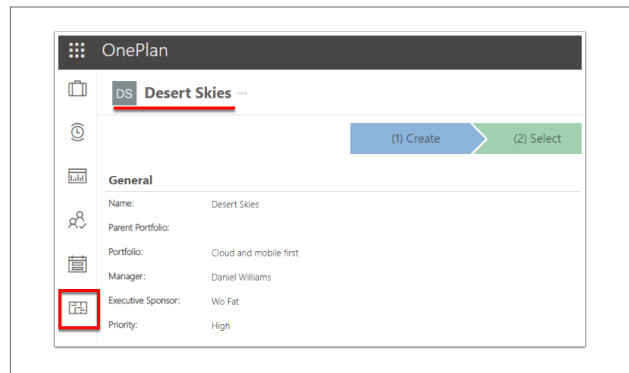
## Open Plan

Navigate to your plan from the Portfolios page.



## Select SharePoint

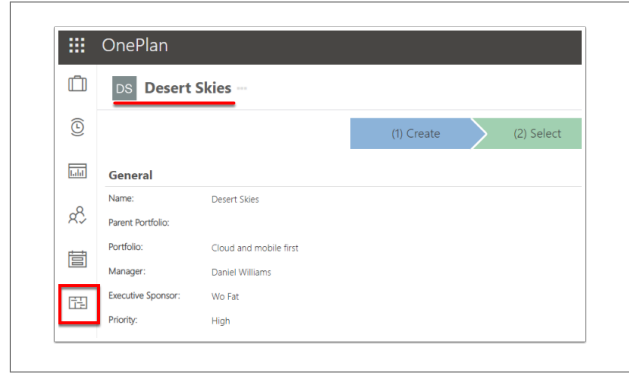
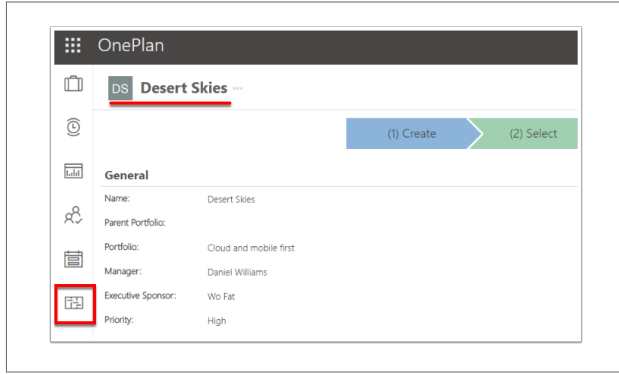
Open the plan contextual menu. Select **SharePoint**.



## Create New Plan Site/Workspace

Click the **Connect** button to create a workspace for this plan. Based on the plan type, the template configured by the admin determines how the workspace looks with that template's lists, libraries, and content.

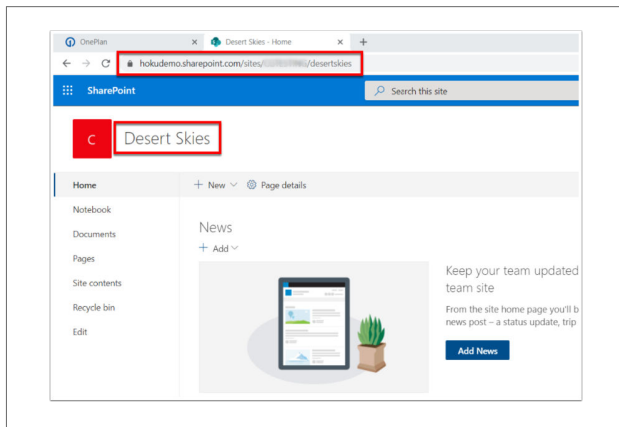
The new workspace is created following the Site Collection URL and then the plan name will be the workspace URL.



### Open Existing Plan Site/Workspace

Whether a workspace was created automatically or manually, the steps to open the workspace are the same. Open the plan contextual menu. Select **SharePoint**. Click the button to open the connected workspace.

The plan name is also the site name in SharePoint.



### Workspace Permissions/Access

The OnePlan plan's team permissions transfers to the workspace permissions.

- Plan Owner: Workspace Owner permissions
- Plan Member: Workspace Edit permissions
- Plan Visitor: Workspace Read-Only permissions

### Portfolios View - Plans with Workspaces

When viewing the Portfolios page, any plan with a connected SharePoint workspace created will show the SharePoint icon.

## SharePoint Online (SPO)

### Terminologies

Term	Description
Site	A site in SharePoint
List	A list in SharePoint.
List Name	The name of a list in SharePoint. <i>Based on Customer requirements.</i>
Field	A column for a list in SharePoint.
Field Names	A specific list of Fields for a specific list in SharePoint. <i>Also known as Mappings, or Field Mappings.</i>

### Requirements

Requirement	Description
Office 365 account	Used as a 'Service' account to perform the Operations listed below. <ul style="list-style-type: none"> <li>• Must have Site Collection Admin permission for each Site.</li> </ul>
Site(s)	The Site in which Operations will be performed.
List(s)	The List Name(s) in which an Operation will execute. <ul style="list-style-type: none"> <li>• Each List requires a list of Field Names.</li> </ul>

### Operations

Operation	Requirements	Description
Get List Items	List Name Field Names	Will pull all items from specified list.
Only Create List Items	List Name Field Names	Will only push New items into the specified list.



<b>Operation</b>	<b>Requirements</b>	<b>Description</b>
Only Update List Items	List Name Field Names	Will only Update existing items into the specified list.
Create Or Update List Items	List Name Field Names	Will either push New items, or Update existing items into the specified list.

# Tabular Data Integration

## OnePlan and Tabular Data for Bulk Resource Import

This article explains how to set up the integration between OnePlan and Tabular Data for bulk resource import.

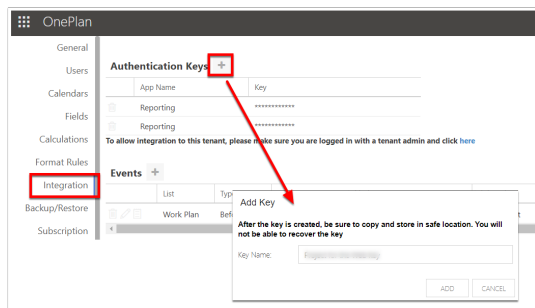
### How to Use OnePlan with Tabular Data

This integration focuses on importing Users (usually in bulk) into OnePlan via a .CSV file format.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### Enable App Permissions

For the OneConnect integration to work, a Microsoft Tenant Administrator will need to enable app permissions.

1. While on the OnePlan Admin page, navigate to the **Users** tab.

2. Expand the **AD Synchronization** section.
3. At the very bottom of the page, locate the sentence “To synchronize users you must enable app permissions: **here**”, and click on the word: **here**. This will load a Microsoft Login screen where the Tenant Admin will have to log in to enable permissions.
4. Once logged in, the Permissions Requested window will appear. Click **Accept** to enable permissions. Page will redirect the user to the **OnePlan Admin** page.

### Permissions requested

Review for your organization



**This application is not published by Microsoft or your organization.**

This app would like to:

#### Read all groups

Allows the app to list groups, and to read their properties and all group memberships on behalf of the signed-in user. Also allows the app to read calendar, conversations, files, and other group content for all groups the signed-in user can access.

This is a permission requested to access your data in Contoso.

#### View users' basic profile

Allows the app to see your users' basic profile (e.g., name, picture, user name, email address)

This is a permission requested to access your data in Contoso.

#### Maintain access to data you have given it access to

Allows the app to see and update the data you gave it access to, even when users are not currently using the app. This does not give the app any additional permissions.

This is a permission requested to access your data in Contoso.

If you accept, this app will get access to the specified resources for all users in your organization. No one else will be prompted to review these permissions.

Accepting these permissions means that you allow this app to use your data as specified in their [terms of service](#) and [privacy statement](#). You can change these permissions at <https://myapps.microsoft.com>. [Show details](#)

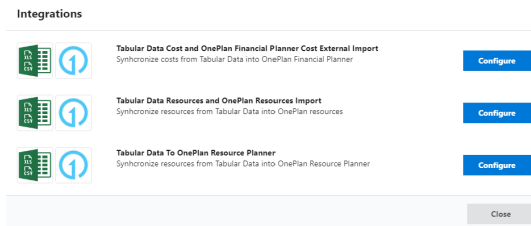
Does this app look suspicious? [Report it here](#)

Cancel

Accept

## OneConnect Setup

1. Go to <https://my.oneconnect.ai>
2. Configure the following integration: **Tabular Data Resources and OnePlan Resources Import** . Click the **Configure** button.



3. Complete the integration configuration form.

- a. Complete the Tabular Data section



### NOTE

Expand the Additional Options tab to see all necessary fields for the integration.

- **SharePoint or OneDrive URL:** Enter in the SharePoint URL where file is located (eg. <https://org123.sharepoint.com/sites/test>).
- **Folder Path:** Enter the folder path where the file is located.



### NOTE

The folder path is based on the front end name, not the URL.

- **Username:** Enter in the username that will be used.
- **Password:** Enter in the password that will be used.
- **Resource Import File Name:** Enter the file name.



### NOTE

We strongly recommend the file be in .CSV format.

#### Additional Options

Client Id (If using registered app auth):



Client Secret (If using registered app auth):



Resource Import File Name (E.g. Users.csv)



For Tabular Data Resources to OnePlan Resources Integration.

Financial Cost Import File Name (E.g. Projects.csv)

For Tabular Data Cost to OnePlan Financial Planner Integration.

Timesheets File Name (E.g. Timesheets.csv)

Exclude Column Headers

Include Previous Success Export

Email Copy To

- b. Click **Next**.
- c. Complete the OnePlan section.
  - **App Name:** Enter/paste the OnePlan app name from the earlier OnePlan Setup steps.
  - **Key:** Enter/paste the OnePlan Key that you saved from the earlier OnePlan Setup steps.
  - **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.

**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

The screenshot shows a configuration form for OnePlan integration. It includes a header with the OnePlan logo and a 'Next' button. The form has three main input fields: 'OnePlan Group Name' (with a red asterisk), 'OnePlan Authentication Key' (with a lock icon), and 'Integration Key Name'. Below these are three expandable sections: 'Additional Options', 'Advanced Options', and 'Relay Options'. At the bottom, there are two buttons: a green 'Test' button and a blue 'Next' button.

d. Click **Next**.

## Integration Information

### Functionality

This integrations main use case for functionality is to import bulk resource from tabular data.

### Scheduled Jobs

The following scheduled jobs are installed by default.

- **SynchResources**
  - Synchronize resources from Tabular Data into OnePlan resources

### Default Mappings

Because we have a file listed in the Users File Name section, the Tabular Data Users to OnePlan Resources field mappings will be made available. At this time, we do not have default field mappings for this integration.

However, the field names in the out of the box OnePlan Resources drop down are:

- **Display Name (Text):** The user name displayed in the OnePlan interface.

Display Name field mapping is intended specifically for Generic Users (this is because when we create generic users, there is no email field available). If a user is marked as generic, we only use the Display Name to create that user in the OnePlan Resource Plan.

**NOTE**

The Display Name column in the .CSV file (even if it is mapped) will be ignored for any non-generic users.

- **Email (Email)::** The user's email address. The email listed in this column should be the email that is in the Tenants Microsoft AD. If the email is not associated with the Tenants Microsoft AD, the user will not come into the Resource list in OnePlan.

The email field is the only mandatory field for non-generic users. When bringing in the email, Microsoft AD will provide the Name (Display Name) section into the OnePlan Resource Center. Every other field that is in the .CSV file and is mapped is optional for generic users.

**NOTE**

The email field must be mapped to bring a non-generic user into the OnePlan Resource Plan.

**NOTE**

If in the .CSV file there are mapped fields and the cell is blank, the value will remain blank as well.

- **Role (GUID\*):** The user's role within the organization. See [Locate Field GUIDs \[129\]](#).
- **Timesheet Administrator (True/False):** Whether or not the user is a Timesheet Administrator in OnePlan. When mapped, the current values that can be given are true and false (these values are not case sensitive).

**NOTE**

By default, if this field is not mapped, the new user will NOT be made a timesheet administrator

- **Global Permissions (Number):** The user's OnePlan environment permissions. See [OnePlan User Permissions](#) for more information. Currently, if importing users into OnePlan, if the user is new, then the user will be created with the permissions level number given if this field is mapped:
  - 0 gives user permission of None
  - 1 gives user permission of Team Member
  - 2 gives user permission of Contributor
  - 3 gives user permission of Manager
  - 4 gives user permission of Owner
  - 5 gives user permission of Executive

**NOTE**

At this time, if there is no value in this field mapping (or if this is not something that is mapped), the user will be given a permission level of 2 (Contributor) by default.

**NOTE**

If a user already exists, Global Permissions can now be updated/changed. Please be careful, as this will affect the number of licenses in OnePlan that you are allocating to your users.

- **Cost (Number up to 2 decimal places):** The user's cost.
- **Rate (Number up to 2 decimal places):** The user's rate.
- **Generic (True/False):** Whether or not the user is a generic resource. If this field is mapped, the values that are accepted are true and false (these values are not case sensitive).

Generic Resources in OnePlan ignore any listed email or global permissions value. So if a resource is marked as generic, there must be a Display Name mapped in the OneConnect field mappings, and the Display Name value in the .CSV file for that generic user to show up in OnePlan.

If a user is marked as a non-generic user initially, and then the user is later changed to generic in the .CSV file, there will be a duplicate resource (one resource listed as generic and the other listed as not generic).

**NOTE**

By default, if this field is not mapped, the new user will NOT be a generic resource.

- **Inactive (True/False):** Whether or not the user is inactive. If this field is mapped, the values that are accepted are currently true, false, active, and inactive (these values are not case sensitive).

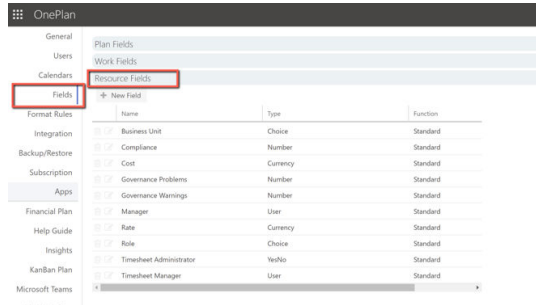
**NOTE**

By default, if this field is not mapped, the new user will NOT be marked as inactive, so the user will show in the Resource Center in OnePlan.

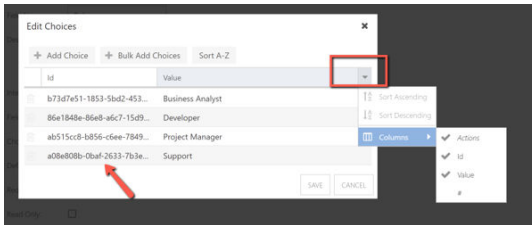
- **Quantity (Number up to 2 decimal places):** The number of resources for a particular user role. For example, you may import multiple Business Analysts.
- **Business Unit (GUID\*):** The user's business unit within the company. See [Locate Field GUIDs \[129\]](#).
- **Manager (Email):** The email address for the user's manager.

## Locate Field GUIDs

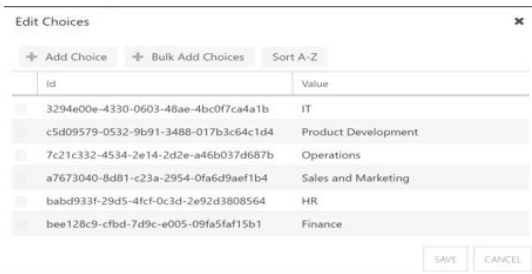
1. Open the Admin pages by clicking on the **Settings gear**.
2. Go to **Fields > Resource Fields**.
3. Click on the **Edit** icon. The **Edit Choices** form will open.



- Click on the drop down arrow, expand **Columns**, and select **Id**.



- The number value within the ID is the GUID for the Role/Business Unit.



**NOTE**

If the ID for the Role and Business Unit do not match, or the text value is put in the .CSV field, no value will show in the OnePlan Resource Plan.



**IMPORTANT**

Be sure to save the changes at the top of the page next to the **Plan Type** dropdown!

This integration was originally intended to bring in financial costs in from a .CSV file and input these costs into the OnePlan Financial Planner. This integration can be run more than once.

**What to know before integration setup**

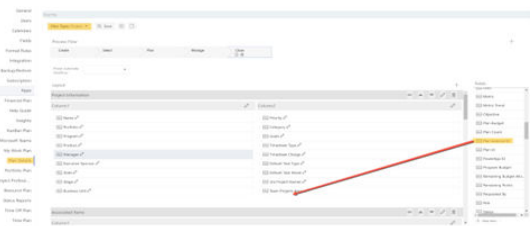
Before you begin integration setup, you need to gather the following information:

- Plan External Id:** The **Plan External Id** is not an out of the box (OOTB) field. **Plan External Id** will be used in place of **Plan ID**. This will be a custom field that the user will have to create, modify, and set themselves.

- Create custom plan field.
  - In the OnePlan Configuration page, go to **Fields** tab -> **Plan Fields** -> Click **New Field**.
  - Give the field a name (e.g. "Plan External Id"). This field type can be a number field or a text field, whichever is more convenient for the user.
- Add custom plan field to the **Plan Details**.
  - While still in the OnePlan Configuration page, go to the **Plan Details** Tab -> **Plan Type**. Pick the plan type you wish to have this new field in.
  - In the far-right column labeled **Fields**, locate the custom field, and drag into the plan section you wish to have this field show up in the **Plan Details** page.

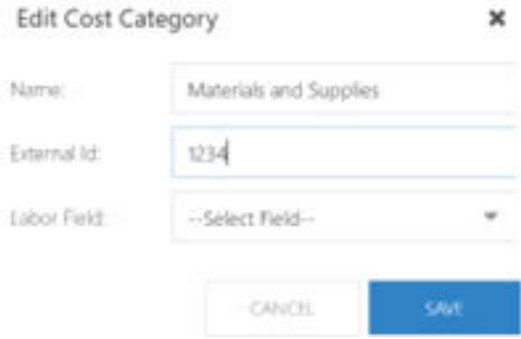
**OnePlan and Tabular Data for Bulk Financial Data Import**

This article explains the OnePlan and Tabular Data for Bulk Financial Data Import integration, including how to setup the integration, and integration information.

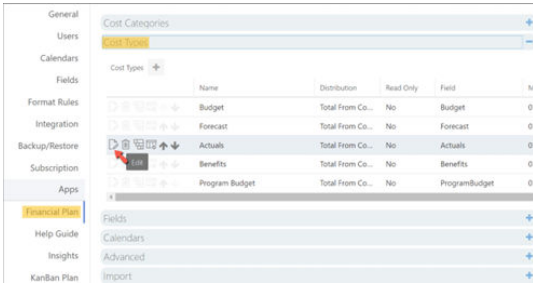


- Set **Plan External Id** Field to the custom field created.

- a. Still in OnePlan Configuration, go to the **Financial Plan** Tab -> **Import**.
- b. Click on the drop down for the **External Id** Field, and select the custom field created.



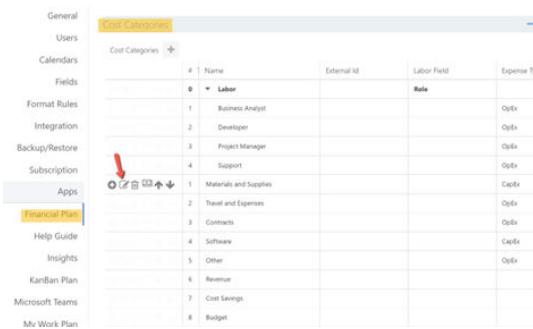
- **Cost Type Name:** This can be found in the OnePlan Admin Configuration page -> **Financial Plan** Tab -> Expand **Cost Types**. In OnePlan, default names are **Budget, Forecast, Actuals, Benefits,** and **Program Budget**. Admin can add/edit/delete these cost types accordingly to their company's preference.



**NOTE**

If there is a cost external id that is in the .CSV file, and is not in OnePlan, a notification will appear within the logs: "No Cost Category for ExternalId: XXXXXX"

- **Cost External Id:** The OOTB cost categories do not have an External Id built in. However, the External Id can be made by the Administrator in OnePlan. To assign an External Id, go to the OnePlan Admin Configuration page -> **Financial Plan** Tab -> Expand **Cost Categories** -> click on the edit icon for any of the cost categories.



**NOTE**

Currently there is no built-in check to ensure that external Ids are unique at this time, so it is advised that the user keep track of these cost external ids.

- **Cost Value:** This will take in a number value up to 2 decimal places.
- **Cost Date:** The cost date will be in the format of 2022-05-22T00:00:00 (YYYY-MM-DDTHH:MM:SS).

The **Edit Cost Category** window will open, and you can input a unique cost external Id of your choice. This field is a text field, so the cost external id can be numbers, letters, or a mix of the two.

**Integration Setup**


This integration focuses on importing financial data into the OnePlan Financial Planner via a .CSV file.

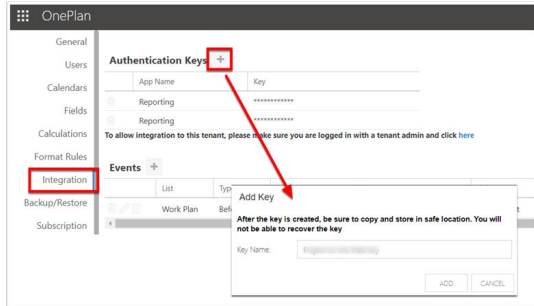
**OnePlan Setup**

To do the OnePlan setup, you need to be an admin, meaning you are a user with Owner permissions in OnePlan.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings** gear .
3. Select **Integration** in the admin navigation.



- Click the **Add** icon  in the **Authentication Keys** section.
- Save the key name and generated key somewhere, as once you navigate away from this browser page, the key cannot be seen. This Authentication key is to be used at a later step in the OneConnect configuration.




## OneConnect Setup

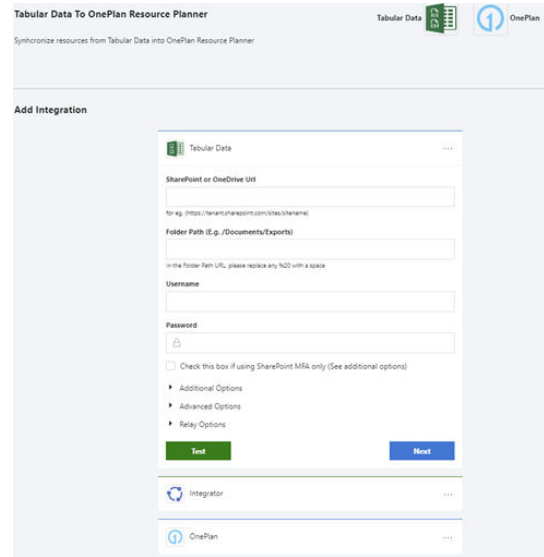
- Go to <https://my.oneconnect.ai>.
- Configure the following integration: **Tabular Data Cost and OnePlan Financial Planner Cost External Import**. Click the **Configure** button.




- Complete the integration configuration form.
- Complete the **Tabular Data** Section.



**NOTE**  
Expand the Additional Options tab to see all necessary fields for the integration.



- **SharePoint or OneDrive URL:** Enter the SharePoint/OneDrive URL where the file is located (eg. <https://org123.sharepoint.com/sites/test>).
- **Folder Path:** Enter the folder path where the file is located.
- **Username + Password:** Enter the username & password that will be used, otherwise feel free to set up Modern Authentication for SharePoint.
- **Financial Cost Import File Name:** Enter the file name to be used for the Financial Planner.



**NOTE**  
We strongly recommend the file be in .CSV format. Attached below is the recommended .CSV file that has the designated column names already set up for use.

- Click **Next**.
- Complete the OnePlan section.

OnePlan Group Name (Enter the name of the OnePlan group that you are connecting to here) \*

OnePlan Authentication Key (Enter the OnePlan authentication key that has been generated from the OnePlan integration admin page here)

Integration Key Name (Only use this when connecting to OnePlan OData, otherwise please leave it blank)

▶ Additional Options

▶ Advanced Options

▶ Relay Options

Test Next

- **App Name:** Enter/paste the OnePlan Group name from the earlier OnePlan Setup steps.
- **Key:** Enter/paste the OnePlan Authentication Key that you saved from the earlier OnePlan Setup steps.
- **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.



#### NOTE

Options currently are: <https://au.oneplan.ai>, <https://ca.oneplan.ai>, <https://eu.oneplan.ai>.

7. Click **Next**.

## Integration Information

### Functionality

This integration main use case for functionality is to import bulk financial data from tabular data.

### Scheduled Jobs

The following scheduled job is installed by default.

- **CostImportToFinancialPlanner:** Synchronize Cost from Tabular Data to OnePlan Financial Planner

### Default Mappings

Currently, we do not have default field mappings for this integration.

The possible field names will populate on the Tabular Data column when the file is read.

The OOTB field names for the OnePlan Financial Cost import dropdown are:

- Plan External Id (Text)
- Cost External Id (Text)
- Cost Type Name (Text)
- Cost Value (Currency)
- Cost Date (Date)

## Tabular Data to OnePlan Resource Planner

This integration was created to bulk import OnePlan Resource Planner information from a .CSV file. Right now, this is a onetime bulk import, however if desired, it is possible to create separate .CSV files for different plans, so only the one plan (or set of plans) will be modified at the same time.

### How to Use OnePlan with Tabular Data

This integration focuses on importing Resource hours into their relevant Cost Types within the Resource Planner associated with a specific plan.



#### IMPORTANT

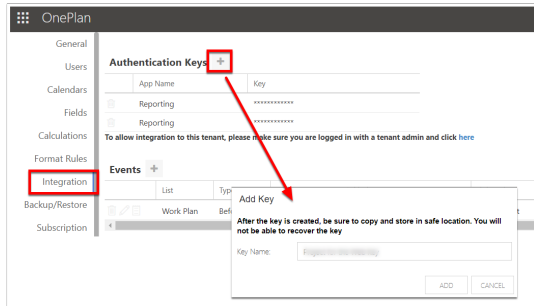
Strategy will erase all previous data in the Resource Planner table that is modified. At this time the Resource Planner integration is made to replace any data that currently resides within resource planner table with the values inside of the .CSV file.

## OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.

- Open the Admin pages by clicking on the **Settings gear**.
- Select **Integration** in the admin navigation.
- Click the + (plus) icon in the Authentication Keys section.
- Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



- **SharePoint or OneDrive URL:** Enter the SharePoint/OneDrive URL where the file is located (e.g., `https://{OrganizationName}.sharepoint.com/sites/{SiteName}`).
- **Folder Path:** Enter the folder path where the file is located.
- **Username:** Enter the username.



**NOTE**

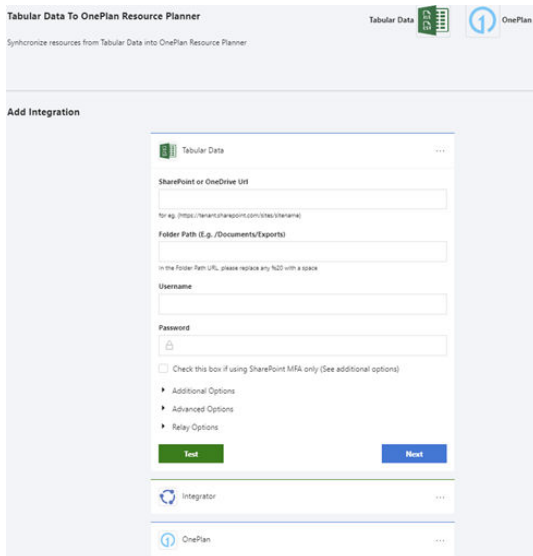
The username must not have Multi-Factor Authentication (MFA) associated with it. Because of this, we encourage a service account to be used to access the SharePoint site.

**OneConnect Setup**

- Go to <https://my.oneconnect.ai>
- Configure the following integration: **Tabular Data To OnePlan Resource Planner**. Click the **Configure** button.



- Complete the integration configuration form.
  - Complete the **Tabular Data** section.



**NOTE**

It is standard best practice to have a single service account be associated to a single integration. If a service account is associated to multiple integrations, throttling can occur from Microsoft, which can lead to strategy failures.

- **Password:** Enter the password.
- **Resource Import File Name:** Enter the file name to be used for the Resource Planner. We strongly recommend the file be in .CSV format.
- **(Optional- Checkbox) ) SharePoint Modern Authentication:** For more information on how to [Set Up Modern Authentication for SharePoint](#).
- **(Optional) Client Id:** Enter the Client ID generated from the SharePoint site. To be used with the Modern Authentication checkbox.

- **(Optional) Client Secret:** Enter the Client Secret generated from the SharePoint site. To be used with the Modern Authentication checkbox.
- b. Click **Next**.
- c. Complete the **OnePlan** section.

- **Group Name:** Enter the OnePlan Group name you will be integrating into.
- **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
- **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than `https://my.oneplan.ai`, please enter the appropriate URL here.



**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

- **(Optional) Do not remove existing data:** (Default) When unchecked, all previously imported data will be removed from OnePlan.
- **(Optional) Select a Delete Scope:** This field is not to be used when the Do not remove existing data checkbox is checked. The Delete Scope is in relation to what data is desired to be removed each time

the ResourceImportToResourcePlanner strategy runs.

- **Default – All Resources.** This option will remove all resources from the OnePlan Resource Planner and the data will be replaced with the data inside of the CSV document.
- **Included Resources.** This option will remove only the resources listed inside of the CSV document and their data will be subsequently replaced by the values inside of the CSV file.

- d. Click **Next**.

**Integration Information**

**Default Scheduled Strategies**

The following scheduled job is installed by default:

- **ResourceImportToResourcePlanner:** This strategy synchronizes Resources from Tabular Data to the Resource Planner.

**Default Field Mappings**

**Users – BulkResrcImport**

OnePlan Fields	Tabular Data Fields	Direction
Plan External ID	Plan External ID	Both
Resource	Resource	Both
Type Name	Type Name	Both
Hours	Hours	Both
Fiscal Month Period	Fiscal Month Period	Both



**NOTE**

If the integration is made, and the file cannot be found, the field mappings will not be created here, and will then need to be manually created.

**CSV File Columns**

The CSV File will have 5 columns: Plan External ID, Resource, Type Name, Hours, Fiscal Month Period.

**Plan External ID**

This is the Plan Id. There are multiple ways to find this value:

- Using Developer Tools:
  - Open the Console.
  - Type **PlanId** into the console.
  - Press **Enter**. The value will show in red and in single quotation marks.
- While inside a plan view:
  - Click on personal image of user (top right of page).
  - Click **Share With**.
  - Go to end of text, locate **Plan ID= {PlanIdValue}**.

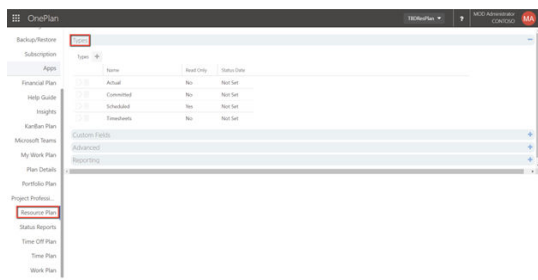
### Resource

This can either be the Email (for non-generic users) or the Display Name (for generic users) of the Resource that will have time allocated to them.

### Type Name

This is the Resource Plan Type that the information will be brought into. The Out of the Box values in OnePlan are Committed, Scheduled, Timesheets.

To create custom Resource Plan Type, go to OnePlan Config > **Resource Plan > Types**. Add the name of the Type you wish to see here, ensure that **Resource Plan** is selected in the **Available Apps** section.



### Hours

Hours are merely the time spent in that fiscal time frame. A number value.

### Fiscal Month Period

The Fiscal Month Period will be in the format of: **YYYY-MM-DDTHH:MM:SS**.

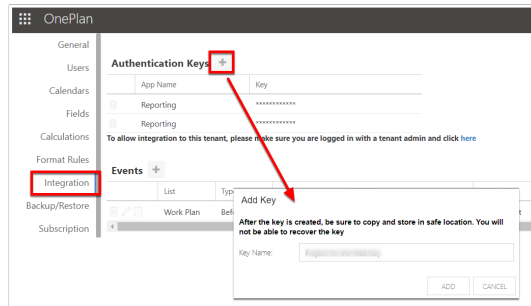
### Tabular Data to OnePlan Plans

This integration was created to bulk import OnePlan Plan information from a .CSV file.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.


- Log in to your OnePlan group with your Office365 account.
- Open the Admin pages by clicking on the **Settings gear**.
- Select **Integration** in the admin navigation.
- Click the + (plus) icon in the Authentication Keys section.
- Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### Set Plan External ID

The Plan External Id is not an out-of-the-box (OOTB) field. Plan External Id will be used in place of Plan ID. This will be a custom field that the user will have to create, modify, and set themselves.

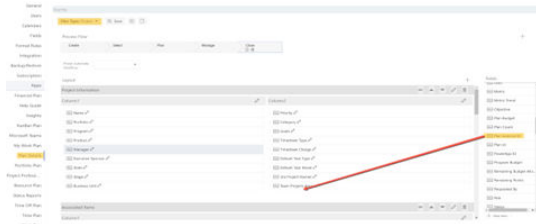
- Create a custom plan field. In the OnePlan Configuration page, go to **Fields > Plan Fields** > Click **New Field**. Give the field a name (E.g., Plan External Id).

 **NOTE**  
This field type should be a text field.

- Add the custom plan field to the Plan Details form. While still in the OnePlan Configuration page, go to **Plan Details > Plan Type**. Pick

the plan type you wish to have this new field in. In the far-right column labeled **Fields**, locate the custom field, and drag into the plan section you wish to have this field show up in the Plan Details page.

**IMPORTANT**  
Be sure to save the changes at the top of the page next to the **Plan Type** drop-down!



3. Set Plan External Id Field to the custom field created. Still in OnePlan Configuration, go to **Financial Plan > Import**. Click on the drop-down for the **External Id Field**, and select the custom field created. This setting will automatically save.



## OneConnect Setup

**NOTE**  
To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.
2. Locate the **Tabular Data to OnePlan Plans** integration. Click the **Configure** button.



3. Complete the integration configuration form.
  - a. Complete the **Tabular Data** section.

**NOTE**  
Expand the Additional Options area to see all the necessary fields to be filled in.


- **SharePoint or OneDrive URL:** Enter the SharePoint/OneDrive URL where the file is located (e.g., `https://{OrganizationName}.sharepoint.com/sites/{SiteName}`).
- **Folder Path:** Enter the folder path where the file is located.
- **Username:** Enter the username.

**NOTE**  
The username must not have Multi-Factor Authentication (MFA) associated with it. Because of this, we encourage a service account to be used to access the SharePoint site.

**NOTE**  
It is standard best practice to have a single service account associated with a single integration. If a service account is associated to multiple integrations, throttling can occur from Microsoft, which can lead to strategy failures.

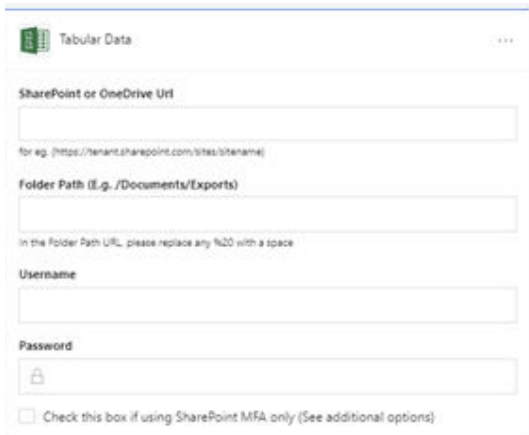
- **Password:** Enter the password.

- **Financial Cost Import File Name or Plan Import File Name:** Enter the file name to be used for importing the plans into OnePlan.




**NOTE**  
We strongly recommend the file be in .CSV format.

- **(Optional – Checkbox) Using SharePoint Modern Authentication:** See [SharePoint Modern Authentication](#) for more information.

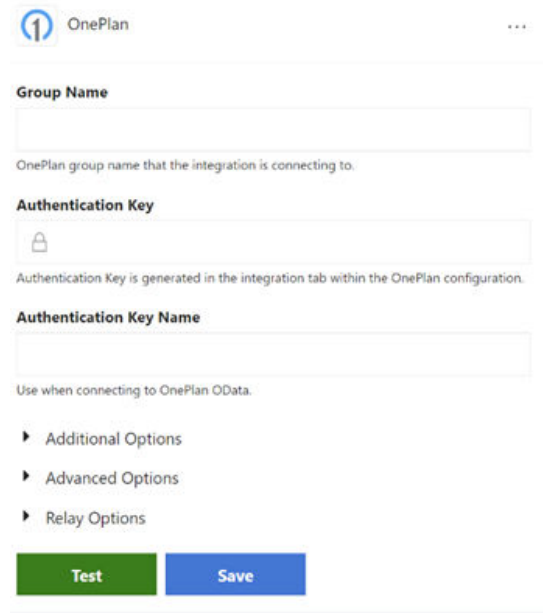


- Click **Next**.
- Complete the **OnePlan** section.
  - **Group Name:** Enter the OnePlan Group name you will be integrating into.
  - **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
  - **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than https://my.oneplan.ai, please enter the appropriate URL here.



**NOTE**  
Options currently are:  
https://au.oneplan.ai,  
https://ca.oneplan.ai,  
https://eu.oneplan.ai.

- **(Optional) OnePlan Default Plan Type:** Should any plan not have a plan type listed within the CSV file; the value listed here will be the default plan type.
- **(Optional) Create plan(s) if External ID value does not already exist in OnePlan:** Should an external ID not match a plan that already exists within OnePlan, this setting will create the Plan in OnePlan, with the Plan External ID set.



- Click **Next**.

## Integration Information

### Default Field Mappings

Currently, we do not have default field mappings for this integration.

### Mandatory Fields to be Mapped

At minimum, only two values need to be mapped on the OnePlan side for the data to come into OnePlan: **Name** and **Plan External ID**.

### Default Scheduled Strategies

**SyncPlansByPrimaryKey:** This strategy synchronizes Tabular Data rows as Plans into OnePlan.



This strategy has been set to **Enabled**, however the **Schedule Type** has been set to **None**. This means that the strategy will not trigger on a set schedule and will only run when manually triggered through OneConnect.

If desired, a schedule can be set when clicking on the pencil icon in the **Schedules Tab** within the integration. The **Schedule Type** dropdown is beneath the Properties section.

## Important CSV information

### Beginning the CSV row with a #

In the CSV file, should the row begin with a number sign (#), that row will be treated as a comment, and will not be processed.

### Multi-Choice Values

If attempting to set a multi-choice field with multiple values the values should be separated by a semicolon and a number sign combination in the CSV file: **Value1;# Value2**.

### Estimated Start/Estimated End

**Estimated Start** and **Estimated End** dates in OnePlan are special fields within OnePlan. These dates will change if there are any tasks within the **Schedule** section of the Work Plan, as those values have a higher precedence than the values within the integration/API call.

# Jira Integration

## Jira Epics Integration - Integration Overview

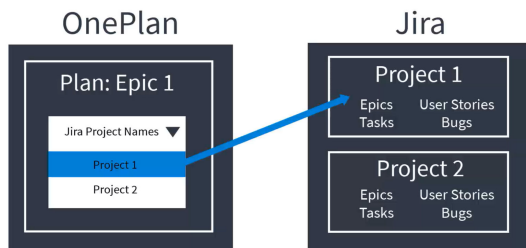
This article describes the Jira Epics to OnePlan Plans integration, and how it functions.

The following video details how the Jira Epics to OnePlan Plans integration works.

[//player.vimeo.com/video/757711751](https://player.vimeo.com/video/757711751)

This integration has these main use cases for functionality.

1. Create/Update Epic level item type in Jira
2. On creation, user will be required to specify the Project where the epic will belong in Jira
3. Create/Update plan in OnePlan
4. Create/Update backlog in OnePlan from Jira issue types associated with the connected project
5. Issue types synchronized are based on the ones specified in OneConnect



6.

## Jira Epics Integration - Integration Setup

This article explains how to set up the integration between OnePlan Plans and Jira Epics.

### OnePlan

For the integration configuration, you will need to collect the following information from OnePlan:

- the group name
- an authentication key
- the authentication key name

To complete the OnePlan setup, you need to be an admin (user with Owner permissions) in OnePlan.

1. Log into your OnePlan group using your Office365 account.
2. Open the Admin pages by clicking on the **Settings** (gear) icon.
3. Select **Integration** on the Admin Navigation panel.
4. Click the+(plus) icon in the **Authentication Keys**
5. Save the **App Name** and the **Keys** somewhere safe, as this will give any program access to your OnePlan group. The key will no longer be viewable once the page refreshes or you navigate elsewhere.

### Jira

**NOTE:** There are clickable links within this video.

For the integration configuration, you will need to collect the following information from Jira:

- Jira URL (e.g., <https://<organization>.atlassian.net>)
- Jira username
- API token

To generate an API Token in Jira:

1. Log into Jira.
2. Navigate to [atlassian.com/manage-profile/security/api-tokens](https://atlassian.com/manage-profile/security/api-tokens).
3. Click **Create API Token**. A new window will appear.
4. Give the API Token a unique **Label**.
5. Click **Create**. The API Token will appear.
6. Click Copy. Green text will appear below the API Token field saying: **API token copied to clipboard**.
7. Click **Close**.

### OneConnect

To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>

- Navigate to **Jira Epics and OnePlan Plans**. Click the **Configure**.



## OnePlan Section

- Group Name:** Enter the **OnePlan Groupname** you will be integrating into.
- Authentication Key:** Enter the **OnePlan Authentication Key** generated from OnePlan.
- (Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used



### NOTE

Options currently are: <https://au.oneplan.ai>, <https://ca.oneplan.ai>, <https://eu.oneplan.ai>.

- Click **Next**.

## Jira Section

Expand the **Additional Options** area to see all the necessary fields to be filled in.

- Jira URL:** Enter the Jira URL (e.g., <https://<organization>.atlassian.net>).
- Username:** Enter the Jira username to be used to access environment.
- Jira API Token:** Enter the API Token to access Jira account.
- Jira Issues to OnePlan Backlog:** Enter the list of Jira issue types that will be brought into OnePlan as backlog items. Defaults are Task, Bug, and Story.
- Jira Issue to OnePlan Plan:** If no value is brought into this field, Epic in Jira will be brought into OnePlan at the Plan level (regardless of Project).
- (Optional - Checkbox) Sync with next-gen Jira:** (Default) When unchecked, only the older versions of Jira can be synched between

OnePlan and Jira. If using next-gen Jira (aka team-managed projects), check the box to enable synching between Jira and OnePlan.

- (Optional - Checkbox) Sync all issues in the backlog:** (Default) When checked the Jira Issues to OnePlan backlog field will be ignored, and all issues associated to the Jira Epic will be brought in to OnePlan backlog.
- (Optional - Checkbox) Roll up sub-tasks, and resources to its parent:** (Default) When unchecked, Jira backlog items in OnePlan will be assigned to their own task. If checked, all the child backlog items that have unique user assigned to them will “roll up” to the parent backlog item.
- (Optional - Checkbox) Utilizing Jira Server:** (Default) When unchecked, access to Jira will go through the cloud.
- (Optional - Checkbox) Always ignore delta at Epic level sync:** (Default) When unchecked, if the scheduled job runs on Deltas, the strategy will only pick up items that have been modified at the plan level only. When checked, the strategy will pick up the task / backlog items that have been modified as well.

The following video walks through each optional setting.

## Jira Epics Integration - Default Field Mappings and Scheduled Strategies

This article explains the Jira Epics to OnePlan Plans default field mappings for your integration.

The following video walks though the default field mappings for the Jira Epics and OnePlan Plans integration.

### Check the Field Mappings

After the integration is installed, it is best practice to check the default field mappings for errors or missing mappings.

After reviewing the field mappings, continue on to [Jira Integration - Custom Types Settings \[144\]](#).

## Integration Information

### Functionality

This integration has these main use cases for functionality.

1. Create/Update Epic level item type in Jira
2. On creation, user will be required to specify the Project where the epic will belong in Jira
3. Create/Update plan in OnePlan
4. Create/Update backlog in OnePlan from Jira issue types associated with the connected project
5. Issue types synchronized are based on the ones specified in OneConnect.

### Default Field Mappings

#### Plans - Epics

OnePlan Fields	Jira Fields	Direction	Notes
Name	Summary	Both	Required
Jira Project Names	Project Name (Epic)	Both	Required
Owner	Assignee	Both	Recommended

#### Backlogs – Issues

OnePlan Fields	Jira Fields	Direction	Notes
Name	Summary	Both	Required
Parent Id (Structure)	Parent Issues ID	Both	
Assigned To	Assignee	JIRA to OP	
Start	Start Date (Sprint)	JIRA to OP	
Due	End Date (Sprint)	JIRA to OP	
Item Type	Issue Type	JIRA to OP	
Points	Story Points	JIRA to OP	
Iteration (OnePlan System)	Sprint Name (With Board)	JIRA to OP	
Status	Status	JIRA to OP	
Effort	Original Estimate	JIRA to OP	

## Lookup Tables – Lookup Tables

OnePlan Fields	Jira fields	Direction	Notes
Jira Project Names (Plan)	Project Names	Both	Required

### Default Scheduled Strategies

The following scheduled strategies are installed by default:

- **SynchLookup** - SynchLookup will synchronize the list of Project Names from Jira into the Jira Project Names dropdown within OnePlan.
- **OnePlanUpdate** - Publish data from Jira to OnePlan.

This strategy will bring in all Jira Epics and their associated issues into OnePlan. It is recommended that a filter be put in place to limit what Epics are desired to be brought over.

- **OnePlanPublish** - Publish data from OnePlan to Jira.

This strategy has a filter within the **OnePlan – Jira > Plans – Epics** section. This filter will only bring plans from OnePlan over to Jira if the **Jira Project Names** field has a value selected. If this filter is removed (and not replaced with an alternative filter), the strategy will fail for each plan that does not have this field filled in within OnePlan.

## Jira Epics Integration - Integration Recommendations and Best Practices

### Error: One of the specified issue type does not exist in Jira!

OnePlanUpdate, in the GetEachIssueChildren function, there is an error of: **Error: One of the specified issue type does not exist in Jira!**

This may indicate that the client is using the next-gen Jira. Also known as Team-managed.

Please go back into the Integration tab and check the Utilizing next-gen Jira.

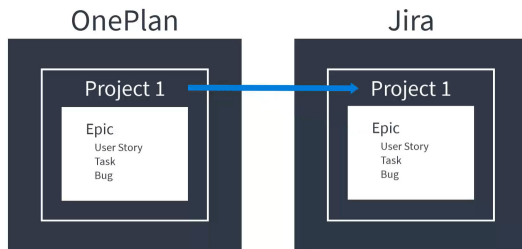
## Jira Project Integration - Integration Overview

This article describes the Jira Projects to OnePlan Plans integration, and how the integration is similar and how it differs from the Jira Epics to OnePlan Plans integration.

The following video describes the similarities and differences between the two Jira integrations.

This integration has these main use cases for functionality.

1. Create/Update project in Jira
2. On creation, user is able to select Jira project types
3. Create/Update plan in OnePlan
4. Create/Update backlog in OnePlan from Jira issue types associated with the connected project
5. Issue types synchronized are based on the ones specified in OneConnect



## Jira Project Integration - Integration Setup

This article explains how to set up the integration between OnePlan Plans and Jira projects.

### OnePlan

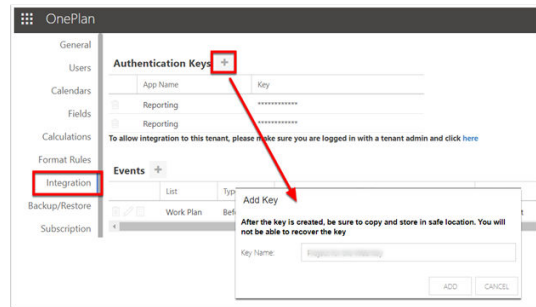
For the integration configuration, you will need to collect the following information from OnePlan:

- the group name
- an authentication key
- the authentication key name

To complete the OnePlan setup, you need to be an admin (user with Owner permissions) in OnePlan.

1. Log into your OnePlan group using your Office365 account.

2. Open the Admin pages by clicking on the **Settings** (gear) icon.
3. Select **Integration** on the Admin Navigation panel.
4. Click the **+** (plus) icon in the **Authentication Keys**
5. Save the **App Name** and the **Key** somewhere safe, as this will give any program access to your OnePlan group. The key will no longer be viewable once the page refreshes or you navigate elsewhere.



### Jira

For the integration configuration, you will need to collect the following information from Jira:

- Jira URL (e.g., <https://<organization>.atlassian.net>)
- Jira username
- API token

To generate an API Token in Jira:

1. Log into Jira.
2. Navigate to [atlassian.com/manage-profile/security/api-tokens](https://atlassian.com/manage-profile/security/api-tokens).
3. Click **Create API Token**. A new window will appear.
4. Give the API Token a unique **Label**.
5. Click **Create**. The API Token will appear.
6. Click Copy. Green text will appear below the API Token field saying: **API token copied to clipboard**.
7. Click **Close**.

### OneConnect

To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

- Go to <https://my.oneconnect.ai>

Navigate to **Jira Project and OnePlan Plans**. Click the **Configure** button.



## OnePlan Section

- Group Name:** Enter the **OnePlan Group** name you will be integrating into.
- Authentication Key:** Enter the OnePlan **Authentication Key** generated from OnePlan.
- (Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.



### NOTE

Options currently are: <https://au.oneplan.ai>, <https://ca.oneplan.ai>, <https://eu.oneplan.ai>.

- Click **Next**.

## Jira Section

Expand the **Additional Options** area to see all the necessary fields to be filled in.

- Jira URL:** Enter the Jira URL (e.g., <https://<organization>.atlassian.net>).

- Username:** Enter the Jira username to be used to access environment.
- Jira API Token:** Enter the API Token to access Jira account.
- Jira Issues to OnePlan Backlog:** Enter the list of Jira issue types that will be brought into OnePlan as backlog items. Default values are Task, Bug, and Story.

- (Optional - Checkbox) Sync with next-gen Jira:** (Default) When unchecked, only the older versions of Jira can be synced between OnePlan and Jira. If using next-gen Jira (aka team-managed projects), check the box to enable syncing between Jira and OnePlan.
- (Optional - Checkbox) Utilizing Jira Server:** (Default) When unchecked, access to Jira will go through the cloud.
- (Optional - Checkbox) Adding unassigned issues:** When projects are updated, it will set the project's assignee to Unassigned instead of Project Lead (Default Value).

## Jira Epics Integration - Custom Types Settings

This article explains how to configure the custom types settings for the Jira Epics to OnePlan Plans integration.

Then following video walks through the steps to configure custom types for the Jira to OnePlan integration.

### Configure Custom Types

Jira allows users to configure custom issue and epic types. To allow those custom types to sync to OnePlan via the integration, you must configure the integration settings to allow the desired item types.

## Configure Issue Types

1. Go to the OneConnect integration configuration tab.
2. Go to the **Integration tab > Jira**.
3. In the **Issue Types** field, type in the desired Jira issue types. Separate each type with a comma.  
**NOTE:** The default issue types are Task and Bug.
4. To prevent a type from syncing to OnePlan, remove the type name from the field.

## Configure the Epic Type

If users are using a custom hierarchy, use this setting to map OnePlan Plans to the desired Epic type.

1. Go to the OneConnect integration configuration tab.
2. Go to the **Integration tab > Jira**.
3. In the **Epic Type** field, type in the desired Jira epic type.  
**NOTE:** The default epic type is Epic.

Once the Issue and Epic types are configured, continue on to [Jira Integration - Essential Settings](#).

## Jira Project Integration - Default Field Mappings and Scheduled Strategies

This article explains the Jira Projects to OnePlan Plans default field mappings for your integration.

To complete the Jira integration setup, you must complete:

1. [Jira Integration - OnePlan Setup \[140\]](#)
2. [Jira Integration - Jira Setup](#)
3. *(You are here)* [Jira Integration - Projects Field Mappings \[145\]](#)
4. [Jira Integration - Custom Types Settings \[144\]](#)
5. [Jira Integration - Essential Settings](#)

## Check the Field Mappings

After the integration is installed, it is best practice to check the default field mappings for errors or missing mappings.

After reviewing the field mappings, continue on to [Jira Integration - Custom Types Settings \[144\]](#).

## Integration Information

### Functionality

This integration has these main use cases for functionality.

1. Create/Update project in Jira
2. On creation, user is able to select Jira project types
3. Create/Update plan in OnePlan
4. Create/Update backlog in OnePlan from Jira issue types associated with the connected project
5. Issue types synchronized are based on the ones specified in OneConnect

## Default Field Mappings

### Plans - Projects

OnePlan Fields	Jira Fields	Direction	Notes
Name	Project Name	Both	Required
Jira Project Types	Project Types	Both	Required
Owner	Lead	Both	Required

### Backlogs - Issues

OnePlan Fields	Jira Fields	Direction	Notes
Name	Summary	Both	Required
Parent Id (Structure)	Parent Issues ID	Both	Recommended

### Lookup Tables - Project Types

OnePlan Fields	Jira Fields	Direction	Notes
Jira Project Types (Plan)	Type Name	Both	Required

## Default Scheduled Strategies

The following scheduled strategies are installed by default:

- **SynchJiraProjectTypes** - SynchJiraProjectTypes will synchronize the list of Jira Project Types to the OnePlan choice field Jira Project Types.
- **OnePlanUpdate** - Publish data from Jira to OnePlan.



This strategy will bring in all Jira Projects and their associated issues into OnePlan. It is recommended that a filter be put in place to limit what Projects are desired to be brought over.

- **OnePlanPublish** - Publish data from OnePlan to Jira.

This strategy will bring in all OnePlan Plans and their associated backlogs into Jira. It is recommended that a filter be put in place to only bring in Plans that have a Jira Project Type filled in be brought over to Jira for the strategy to not fail.

## Jira Project Integration - Integration Recommendations and Best Practices

### Set Jira Project Category As OnePlan Portfolio Plan Type

For the Jira Project to come into OnePlan as a Plan type (Epic, Project, Portfolio, etc.) there needs to be a field at the Project Settings page in Jira that tells OneConnect where to set the Project in OnePlan.

Most clients set the Category dropdown as the field to use.

#### Jira

1. Log into Jira.
2. Click on a Project.
3. On the left navigation bar click on **Project Settings**. This will load the Project Details page.
4. Locate **Project Category**, expand the dropdown or click on the **i** next to the dropdown.
5. Click on **Manage Categories/Add a New Project Category**. A new page will load with all the current categories created.
6. Towards the bottom of the page, give the name the title of the OnePlan Portfolio Plan type (OOTB options are Portfolio, Program, Project, Epic).
7. For each Project that is wished to be brought in, make sure the Jira Project Category has the correct OnePlan Plan Type.

#### OneConnect

1. Log into OneConnect.

2. Locate the integration and click on the **pencil icon** to edit the integration.
3. Expand the **Mappings** dropdown, select **Fields**.
4. Expand the **Plans – Projects** section
5. Map OnePlan Portfolio Plan Type to Jira Project Category.

### Add Jira Project Types to Plan Details Form

For a plan that is created in OnePlan to be brought into Jira, the Jira Project Types filed must be filled in. To show the Jira Project Types field for any of the OnePlan Plan types used, it must be added to the Plan Details form.

1. Navigate to the OnePlan Configuration page.
2. On the left navigation panel, click **Plan Details**.
3. In the **Plan Type** dropdown, select the plan type you wish to add the Jira Project Type field to.
4. Locate the **Jira Project Type** field on the top left box and drag the field to the desired location.
5. Click **Save**.

# OneAnalytics Integration

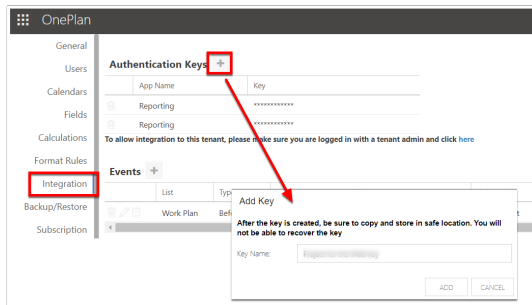
## OneAnalytics (SQL Server) Integration - Integration Setup

This article explains how to set up the OneAnalytics for OnePlan integration.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### OneConnect Setup

To complete the OneConnect setup, you need to be an Administrator or Editor in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>.
2. Navigate to **OnePlan SQL Server (v2)**. Click the **Configure** button. The integration configuration form will open.

3. Complete the integration configuration form.
  - a. Complete the **OnePlan** section.



#### NOTE

Expand the Additional Options area to see all the necessary fields to be filled in.

- **Group Name:** Enter the OnePlan Group name you will be integrating into.
- **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.
- **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than `https://my.oneplan.ai`, please enter the appropriate URL here.



#### NOTE

Options currently are `https://au.oneplan.ai`, `https://ca.oneplan.ai`, `https://eu.oneplan.ai`.

- **OData ID:** This can be found in the integration tab within the OnePlan configuration page. The ID is in the Reporting Info field. The ID should look like this format: `xxxxxxxx-xxxx-xxxx-xxxx-xxxxxxxx`.
- **OnePlan OData Table names:** This will be the list of OnePlan OData tables that will be brought over to SQL.
- **Columns to Snapshot (Optional):** This field is optional for those who wish to snapshot only specific fields from OnePlan. The format in which to snapshot specific fields must be in `Table{Field}` format (Resources{Name,UserId,Email,Generic}).

- **Choice Column for Time Tracking (Optional):** This field is optional for those who wish to snapshot choice field values. This is used when specific fields can have time between their last updates tracked. These columns should be listed in this field.
- b. Click **Next**.
  - c. Complete the **SQL Server (v2)** section.
    - **Server:** Enter the server name that will host the data being accessed.
    - **Database:** Enter the name of the database that will be used for this integration.
    - **Username:** Enter the username of the account that has access to the database. This user must have read and write access to the database.
    - **Password:** Enter the password to the username being used in the above field.
  - d. If using SQL Server On-Premises, a relay may be required. To understand what a relay is, see [What is a Relay?. \[19\]](#) For information on a relay installation, see [Relay Installation](#).
  - e. Click **Next**.

## OneAnalytics Integration - Default Field Mappings and Scheduled Strategies

This article describes the default field mappings and scheduled strategies that are set up when the OneAnalytics integration is installed.



### WARNING

Please be advised that if you want to use both the **OnePlan\_to\_SQL\_OneAnalytics** and **TakeOnePlanSnapshot** strategies, we highly recommend that two separate integrations be made. Both strategies use the OData Table Name field, so if there are different tables that are to be snapshot than backed up, this can cause unnecessary tables to be created for the client.

### Default Field Mappings

There are no default field mappings for this integration. All fields will be brought over into SQL automatically.

### Default Scheduled Strategies

**OnePlan\_to\_SQL\_OneAnalytics:** This strategy allows you to sync data from OnePlan to SQL Server for OneAnalytics.

### Optional Strategies

**TakeOnePlanSnapshot:** This strategy takes a snapshot of OnePlan OData tables to SQL Server for OneAnalytics.

For more information on OnePlan oData tables, please see [oData Table Dictionary](#).

## OneAnalytics Integration - Snapshots

This article explains how snapshots function in the OneAnalytics integration.

### Snapshot Frequency

Snapshots can be taken up to once a day.

### Snapshot Data Options

**oData Table Names:** Snapshots currently can be done for all tables listed in the following table. All tables that are listed within this field will be queued up to be snapshot regardless of the other two fields below.

Activities	Plan_Epic	Plan_Project	ResPlanLog
Assignments	Plan_Idea	PlanDependency	StatusReports
Association	Plan_KeyResult	PlanInsights	Tasks
Costs	Plan_Objective	Plans	TimeOff
ModelerModel	Plan_Portfolio	RateTable	TimesheetAudit
ModelerScenarioPlan	Plan_Program	Resources	



**NOTE**

Snapshots can be done for all out of the box oData tables except for Capacity, ResPlan, Timesheets, and Teams.

**Columns to Snapshot:** To ensure that the proper columns are being snapshotted, the value here must be in Table{Field} format. This is to elaborate further from the list of tables from the OData Table Names field and focuses on specific fields that are desired to be snapshot.

- *What happens if no values are entered?*  
If no values are entered within this field, all columns within the OData Table Names field will be snapshot.
- *What happens when values are entered?*  
When the values of TableName{Field1,Field2} are entered within the Columns to Snapshot field, those specific tables will be queried for the snapshot. Once the TakeOnePlanSnapshot strategy has run, a new table will be created within SQL with the name of OnePlan\_Snapshot\_TableName.

**Choice Column for Time Tracking**

- *What happens when values are entered?*  
When choice fields are listed, a new Snapshot table will be generated for any table that has the choice field listed, regardless of the table that has the choice value.

# Power Apps Integration

## Power Apps Entities to OnePlan Plans

This article explains how to set up the integration between Power Apps entities and OnePlan plans.

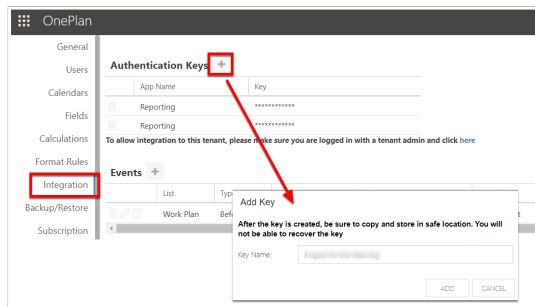
Before beginning, the following assumptions are made in order for this integration setup to be successful:

- Office 365 is up and running
- A Power Apps or Dynamics environment is up and running
- OnePlan group is set up in the same Office365 tenant

## OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan.

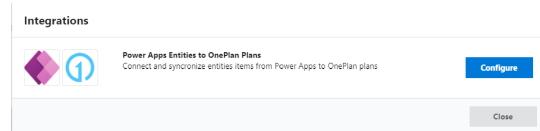
1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



## OneConnect Setup

1. Go to <https://my.oneconnect.ai>

2. Configure the following integration: **Power Apps Entities to OnePlan**. Click the **Configure** button. The integration configuration form will open.



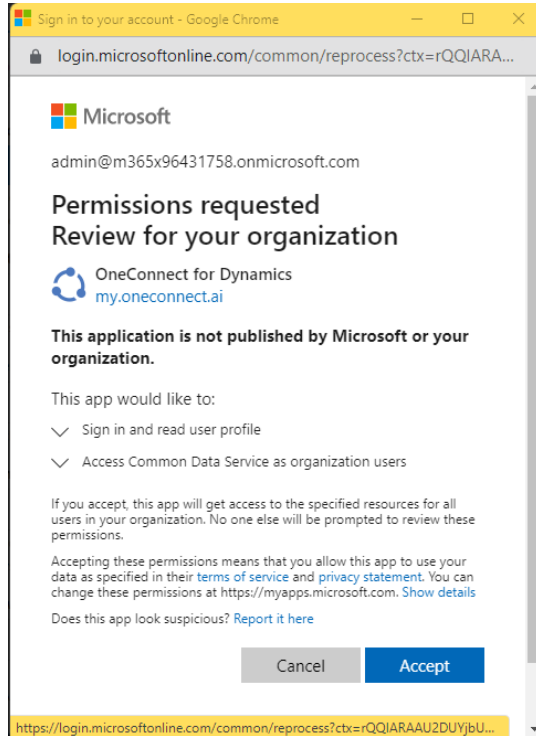
## Power Apps Section

1. **Authorization:** Click on the **Authorize** button to approve consent to use the default Power Apps app registration. Review the app authorization information in the popup, and click **Accept**.



### NOTE

See [How to approve consent](#) for more information.



2. **Client Id (Azure App Id):** Only use this field if you are *not* using the default Power Apps app registration for this integration. Enter your App Id. See [Step 8: Complete the PowerApps setup actions](#) for instructions on how to create and collect your own Application Registration Id.
3. **Power Apps Url:** Enter the URL of the Power Apps environment you are connecting to.
4. **Username:** Enter your Power Apps username. Account needs a Power Apps license, System Admin and System Customizer permissions in the Power Apps environment you are connecting to.
5. **Password:** Enter your Power Apps password.
6. **Additional Options:** Enter the entity name to be synchronized ("oneplan\_project" entity for adaptive PPM).
7. Click **Test**. If the connection test is successful (you will see a notification), click **Next**.

## OnePlan Section

1. **OnePlan Group Name:** Enter the name of the OnePlan group that you are connecting to.
2. **Authentication Key:** Enter/paste the OnePlan Key that you saved from the earlier [OnePlan Setup \[150\]](#) steps.
3. **Integration Key Name:** Leave blank.
4. **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.



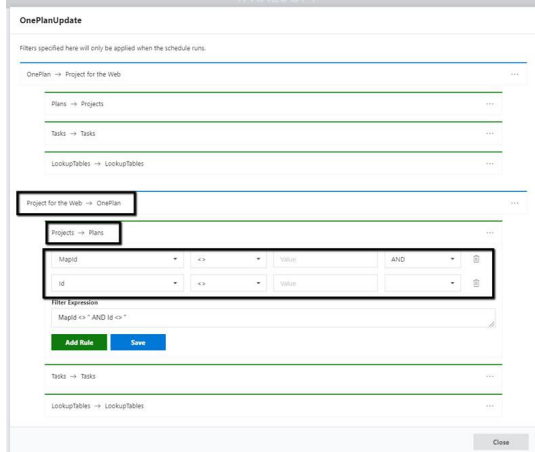
### NOTE

Options currently are: <https://au.oneplan.ai>, <https://ca.oneplan.ai>, <https://eu.oneplan.ai>.

5. Click **Test**. If the connection test is successful (you will see a notification), click **Next**.

## Filter and Field Mapping

A filter must be added to the OneConnect filters, to distinguish which projects in Project for the Web are to synchronize with OnePlan. Add a filter for only Projects that don't have a blank ID, in other words, don't include projects that don't have a mapped OnePlan plan. The ID fields referenced in the filter must also be mapped in the field mappings section.



## Integration Information

### Functionality

This integration has two main use cases for functionality.

1. Create or Update plans from OnePlan as a Project in Project for the Web
2. Create or Update tasks from Project for the Web into OnePlan schedule

### Scheduled Jobs

The following scheduled jobs are installed by default.

1. **SynchLookups**
  - Synchronize any mapped lookup/options set fields' choices from Dynamics into OnePlan
2. **OnePlanUpdate**
  - Synchronize projects and tasks from Project for the Web to OnePlan
3. **OnePlanPublish**
  - Synchronize OnePlan plans into Project for the Web as projects

### Default Field Mappings

Plans (OnePlan) <--> Projects (Project for the Web)

OnePlan Fields	Project for the Web Fields	Direction
Name	Name	Both
Effort	Effort	Both

Tasks (OnePlan) <--> Tasks (Project for the Web)

OnePlan Fields	Project for the Web Fields	Direction
Name	Project Task Name	Both
Effort	Effort	Both
Assigned To	Assigned to	Both

## Power Apps and Teams

Integration: Power Apps (Adaptive PPM Solution) to Teams

- Only for use on 'Adaptive PPM Solution' - This will only currently work if the Project entity name is: `oneplan_project`
- Dynamics connector, same setup/config as other integrations.
- Teams connector:
  - Provide the following link to a Global Admin for a tenant:
    - OneConnect for Teams (App)
    - [https://login.microsoftonline.com/common/oauth2/authorize?client\\_id=f166764a-8e6c-433a-adf5-41e00045b50b&response\\_type=code&prompt=admin\\_consent&redirect\\_uri=https://portal.office.com](https://login.microsoftonline.com/common/oauth2/authorize?client_id=f166764a-8e6c-433a-adf5-41e00045b50b&response_type=code&prompt=admin_consent&redirect_uri=https://portal.office.com)
    - Once they've 'Approved' the app, they'll be redirected to `portal.office.com` - that's the expected result.
  - Use the following Client Id: `f166764a-8e6c-433a-adf5-41e00045b50b`
    - If using this client id, no Client Secret is required.
  - Under Additional Options:
    - Default Owner Email: Can be left blank, unless they want to have a specific person be added as an Owner to any Teams created from the integration.
    - Group Name Prefix: Can be left blank. Typically only used for DEV/QA environments, e.g. 'DEVENV\_' will be added to any Team created from the integration.
    - Tenant Id: Tenant ID for the tenant... If you're logged in with one of their accounts, you can get it from OneConnect > Settings > Tenant Information > Id



# ServiceNow Integration

## ServiceNow and OnePlan Integration

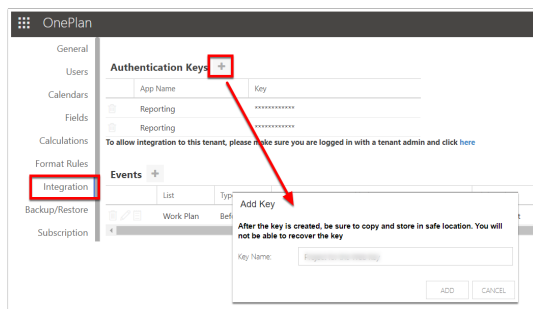
This article explains how to set up the integration between OnePlan and ServiceNow.

This integration focuses on bringing in list items from a ServiceNow table into OnePlan.

### OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



### Integration Setup

1. Go to <https://my.oneconnect.ai>.
2. Locate the **ServiceNow to OnePlan** integration. Click **Configure**.



3. Complete the Configuration form.
  - a. Complete the ServiceNow section:
    - **ServiceNow URL:** Enter the client's ServiceNow instance URL (i.e., <https://<instance-name>.service-now.com>).
    - **Username + Password:** Enter the username and password of the account that will be connecting to ServiceNow.
    - **ServiceNow Table: Plans:** Enter the table name of the items that will be brought into OnePlan as a Plan level item. The table name must be the backend table name (custom tables will often have the **u\_<customtable>** format).
    - **ServiceNow Table: Tasks (Optional):** Enter the table name of the task items created within OnePlan that will be brought into ServiceNow as. The table name must be the backend table name (custom tables will often have the **u\_<customtable>** format).

- b. Click **Save**.
- c. Complete the OnePlan section:
  - **OnePlan Group Name:** Enter the OnePlan group name that this integration will connect to.
  - **OnePlan Authentication Key:** Enter the OnePlan Authentication Key that was created and saved earlier.
  - **(Optional) OnePlan URL:** For clients that have their oneplan.ai hosted outside of the United States, please enter the OnePlan URL used.//

**NOTE**

Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

OnePlan Group Name (Enter the name of the OnePlan group that you are connecting to here) \*

OnePlan Authentication Key (Enter the OnePlan authentication key that has been generated from the OnePlan integration admin page here)

Integration Key Name (Only use this when connecting to OnePlan OData, otherwise please leave it blank)

Additional Options

Advanced Options

Relay Options

Test Next

- d. Click **Save**.

## Integration Information

### Scheduled Jobs

There are no scheduled strategies automatically set up by default.

To add a schedule, click **Add Schedule**, choose the strategy desired, and then fill out the appropriate information. Click **Save**.

### Field Mappings

Currently, we do not have default field mappings for this integration.

All possible field names for the tables will appear when selecting the dropdown list on either side, select the fields desired to be mapped to, then click on the blue plus button on the right.

To change the direction of the field mappings, click on the arrows between the fields until the desired direction has appeared.

## Available Strategies

### ServiceNowToOnePlan

The ServiceNowToOnePlan strategy brings in tasks from ServiceNow into OnePlan as a plan level item. The tasks being brought in will be from the table that was listed in the ServiceNow Table: Plans field when setting up the integration.

### SyncOnePlanToServiceNow

The SyncOnePlanToServiceNow strategy will grab all tasks created within OnePlan (tasks are in the Work Plan – Schedule section) and move those work items to ServiceNow table listed in the ServiceNow Table: Tasks field.

**IMPORTANT**

It is highly recommended that there is a field mapping from ServiceNow to the OnePlan Plan Id (that is bidirectional), this will allow the SyncServiceNowToOnePlan to run.

### SyncServiceNowToOnePlan

The SyncServiceNowToOnePlan strategy will bring in any list item within the ServiceNow table listed as the ServiceNow Table: Tasks, and if that item is mapped to a OnePlan Plan Id, it will be brought into OnePlan as a task.

## Bring in a List Item from ServiceNow into OnePlan

To test the integration against a single item from ServiceNow, and bring that item into OnePlan, will involve a few steps.

1. Decode the ServiceNow plan Id.
  - a. Open a new tab in your browser and type: URL DECODER. Click enter. Select any of the encoders available (we use meyerweb.com).
  - b. While in a plan (viewing the plan form), copy and paste the ServiceNow URL and paste it in the text box for the decoder. Click Decode.
  - c. Once the URL has been decoded, look through the text for sys\_id=. This will signify the beginning of the plan id. After the = sign begin to highlight and copy this section of the URL until you find the &. This number, &, letter sequence will be the plan id.
2. Input the ServiceNow Plan Id into the ServiceNowToOnePlan strategy.
  - a. While logged into OneConnect, navigate to the ServiceNow to OnePlan integration, and click on the schedules button (Calendar icon).
  - b. While in the schedules area, click on the lightning bolt icon to begin running the strategy. A new window will appear.
  - c. Paste the ServiceNow plan Id in the item id text field.
  - d. Click **Execute**.
3. Confirm data is coming into OnePlan correctly.
  - Look into OnePlan and locate the plan, and all the relevant information that has been mapped looks correct.

# Smartsheet Integration

## Smartsheet Integration - Integration Setup

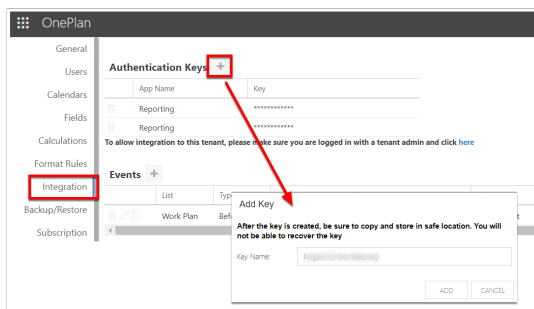
This article explains how to set up the Smartsheet with OnePlan integration.

This integration focuses on Sheets in Smartsheet becoming Plans in OnePlan, and the rows within Smartsheet will appear as Schedules items in the OnePlan Work Plan. The reverse is also possible, plans within OnePlan will become a sheet in Smartsheet, and any Scheduled items in OnePlan Work Plan will become a row item in Smartsheet

## OnePlan Setup

In order to do the OnePlan setup, you need to be an admin, meaning you are a user with **Owner** permissions in OnePlan. If the Advanced Settings are enabled for your group, continue to the next steps. If the Advanced Settings are NOT enabled, contact OnePlan for assistance.

1. Log in to your OnePlan group with your Office365 account.
2. Open the Admin pages by clicking on the **Settings gear**.
3. Select **Integration** in the admin navigation.
4. Click the + (plus) icon in the Authentication Keys section.
5. Save the key name and generated key somewhere (such as in a notepad doc), as once you navigate away, the key cannot be seen. To be used at a later step in the OneConnect configuration.



## Smartsheet Setup

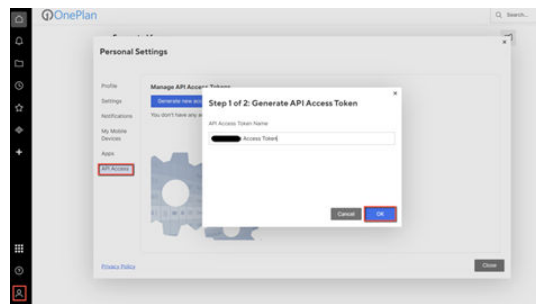
### Generate a Smartsheet API Access Token



#### NOTE

To generate an API Access Token account must have either Pro, Business, or Enterprise Plans.

1. Log into Smartsheet.
2. Go to **Account > Apps & Integrations**.
3. Click on **API Access**.
4. Click **Generate** new access token. A window will appear.
5. Enter an **API Access Token Name**. Click **Ok**.
6. The API Access Token will be generated on the next page.



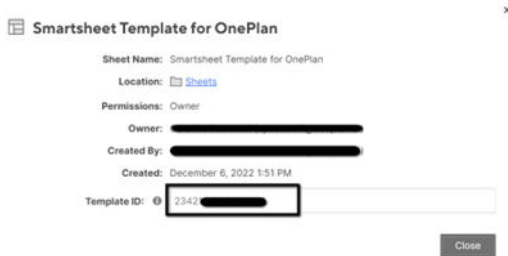
## Locate a Smartsheet Template Id




#### NOTE

To find the Template ID, a Template must be made in Smartsheet.

1. Click on the **Browse** (folder) Icon.
2. Locate the Template that will be used, right click on the template name to expand options.
3. Click on **Properties...** The Template ID will be in the last field at the bottom of the window.




- **(Optional) Alternate OnePlan Environment URL:** If using an alternative environment than <https://my.oneplan.ai>, please enter the appropriate URL here.



**NOTE**  
Options currently are:  
<https://au.oneplan.ai>,  
<https://ca.oneplan.ai>,  
<https://eu.oneplan.ai>.

## OneConnect Setup




**NOTE**  
To complete the OneConnect setup, you need have Administrator or Editor privileges in the OneConnect group you wish to set the integration up in.

1. Go to <https://my.oneconnect.ai>
2. Locate the **OnePlan to Smartsheet** integration. Click the **Configure** button. The integration configuration form will open.




3. Complete the integration configuration form.



**NOTE**  
Expand the **Additional Options** area to see all the necessary fields to be filled in.

- a. Complete the **OnePlan** section.
  - **Group Name:** Enter the OnePlan Group name you will be integrating into.
  - **Authentication Key:** Enter the OnePlan Authentication Key generated from OnePlan.

- b. Click **Next**.
- c. Complete the **Smartsheet** section.



**NOTE**  
Expand the **Additional Options** area to see all the necessary fields to be filled in.

- **Username:** Enter the username.
- **API Token:** Enter the API Access Token to be used with OneConnect. See [Generate a Smartsheet API Access Token \[156\]](#) for instructions.
- **(Optional) Template ID:** Enter the Template ID to be used when importing plans into Smartsheet. See [Locate](#)

a Smartsheet Template Id [156] for instructions.



### NOTE

Check the Use Template checkbox if entering a Template ID.



### NOTE

If no Template ID is entered, any plans that are created from OnePlan to Smartsheet will be created as a simple sheet without any columns except for the Task Name.

Username

API Token

d. Click **Next**.

## OnePlan Changes After the Integration is Complete

Once the integration is complete, three things will occur in the OnePlan integration page:

- An integration line item is made.
- An integration event is created.
- Smartsheet is now available in the Connected Systems icon.

## Integration Line Item

Each item within the Integration section shows the OneConnect integrations connected to the OnePlan Work Plan.

System	List
Microsoft Teams	Plan
Azure DevOps	Backlog
Jira	Backlog
Smartsheet	Schedule

## Integration Event

Integration events are automated responses that will bring data over from OnePlan into Smartsheet.

What this event does is trigger the OnePlanPublish strategy for any item that is connected to Smartsheet. This will bring any values that are mapped to go from OnePlan to Smartsheet to be updated.

What triggers this event is after a connected item has been saved in OnePlan. At the plan details page, this occurs after an item has been modified and then is automatically saved. At the task level, this is done after editing a field, and then clicking **Save**.

## Connected Systems

Any plan item that is connected to Smartsheet will show the Smartsheet icon at the My Portfolio page.

To connect an item from OnePlan into Smartsheet, navigate to the Work Plan - Schedule page, click on the plug icon (Connected Systems Icon) and select the options of connecting to an existing item within Smartsheet, or creating a new item. Once the plan is connected, the Connected Systems window can also be used to Import, Export, or Open the Smartsheet item.

## Smartsheet Integration - Default Field Mappings and Scheduled Strategies

This article details the default field mappings and scheduled strategies installed with the Smartsheet with OnePlan integration.

This integration focuses on Sheets in Smartsheet becoming Plans in OnePlan, and the rows within Smartsheet will appear as Schedules items in the OnePlan Work Plan. The reverse is also possible, Plans within OnePlan will become a sheet in Smartsheet, and any Scheduled items in OnePlan Work Plan will become a row item in Smartsheet.

## Default Field Mappings

### Plans – Sheets

OnePlan Fields	Smartsheet Fields	Direction	Notes
Name	Name	Both	Required
Owner	Owner	Both	Recommended

**Tasks – SheetRows**

OnePlan Fields	Smartsheet Fields	Direction	Notes
Name	Task Name	Both	Required
Status	Status	Both	
Assigned To	Assigned To	Both	
Start	Start	Both	
Due	Finish	Smartsheet to OnePlan	Recommended
% Done	% Complete	Both	
Task Dependency	Predecessor	Both	



**NOTE**

This strategy has a filter within the Smartsheet - OnePlan > Sheets – Plans section. This filter will only sync items that are already mapped to OnePlan. Please talk to your OnePlan Contact about filtering the information being brought in from Smartsheet. If this filter is removed (and not replaced with an alternative filter), all items will be brought into OnePlan.

**OnePlanPublish:** Publish data from OnePlan to Smartsheet.

**Default Scheduled Strategies**

**SynchLookups:** Synchronizes lookups from Smartsheet to OnePlan.



**NOTE**

If there is no Template ID set in the integration, all newly created columns within Smartsheet will appear at the Plans – Sheets table and not the Tasks – SheetRows tables for field mappings. Because of this, SynchLookups will not run as intended, and we do encourage that the client turn off the strategy.



**NOTE**

This strategy has a filter within the OnePlan - Smartsheet > Plans – Sheets section. This filter will only sync items that are already mapped to OnePlan. Please talk to your OnePlan Contact about filtering the information being brought into Smartsheet. If this filter is removed (and not replaced with an alternative filter), all items will be brought into Smartsheet.

**OnePlan Update:** Publish data from Smartsheet to OnePlan.

**Smartsheet Integration - Best Practices and Recommendations**

This article describes integration best practices and recommendation from the OnePlan team regarding the Smartsheet with OnePlan integration.

This integration focuses on Sheets in Smartsheet becoming Plans in OnePlan, and the rows within Smartsheet will appear as Schedules items in the OnePlan Work Plan. The reverse is also possible, Plans within OnePlan will become a sheet in Smartsheet, and any Scheduled items in OnePlan Work Plan will become a row item in Smartsheet.



### **End Dates on dependency-enabled sheets cannot be created/updated**

Unfortunately, Smartsheet does not allow updates to the Finish Date on Project type sheets currently. The finish date is automatically updated by the duration and start dates defined beforehand.

To prevent this error from occurring in the future, please either change the field mapping for Finish date to only go from Smartsheet to OnePlan or remove the field mapping completely.