Using OnePlan

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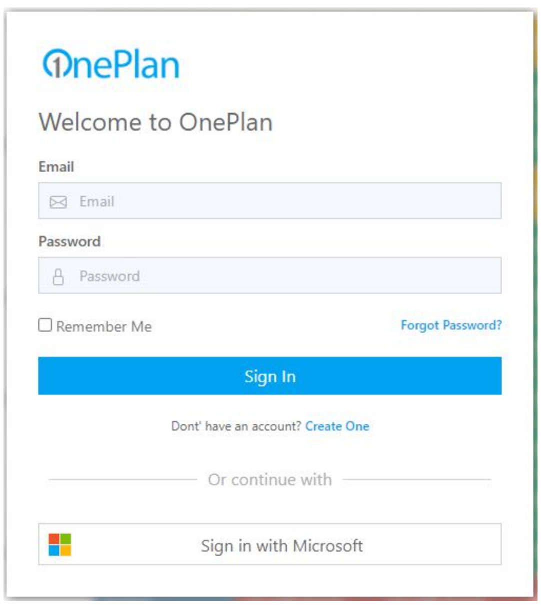
Intro to OnePlan

Log In To OnePlan

This article explains how to access OnePlan.

OnePlan allows for multiple authentication methods: **Office365 Strict**, meaning only users in your organization's Azure Active Directory are able to access OnePlan, or **Multi-Authentication**, meaning users can log in to OnePlan using a OnePlan account they create (see Create a OnePlan Account [17] for instructions), or a Microsoft account. See Enable OnePlan Multi-Authentication for more information.

Regardless of the authentication method your organization uses, when you go to OnePlan (my.oneplan.ai, ca.oneplan.ai, eu.oneplan.ai, au.oneplan.ai, us.oneplan.ai), you will be greeted with a login form.



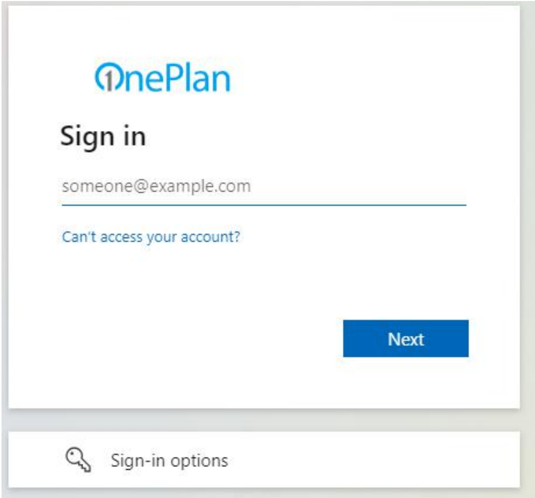
Log in to OnePlan with the Login Form

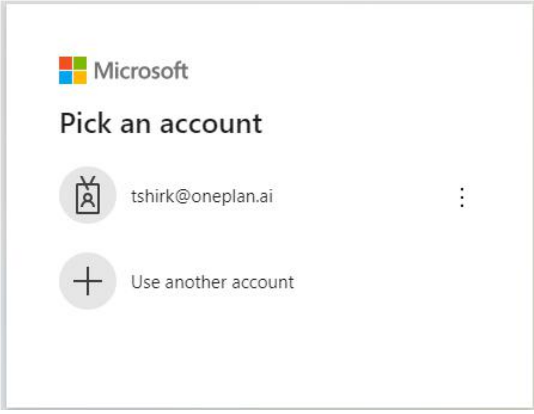
If Logging in with Microsoft Credentials

NOTE

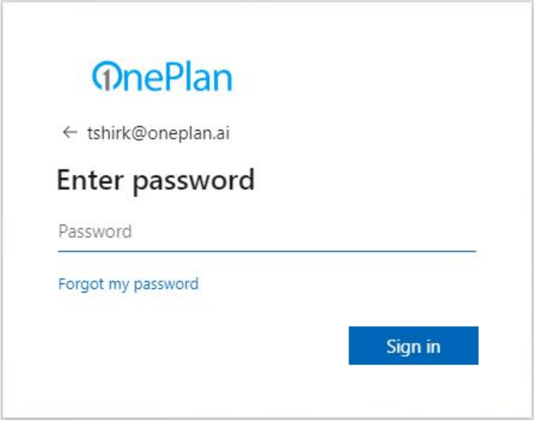
Follow these instructions to access OnePlan when using Microsoft credentials. These steps apply if your organization is using **Multi-Authentication** with **Office365** as an **Allowed Authenticator**, or **Office365 Strict**. See Enable OnePlan Multi-Authentication for more information.

1. Click **Sign in with Microsoft**. You will be redirected to the Microsoft login page.
2. If prompted, enter your email address and click **Next**. Or select your preferred Microsoft account from the **Pick an account** form.





3. Enter your password and click **Sign in**.



4. Follow any additional prompts, such as multi-factor authentication steps. Once complete, you will be redirected to your organization's OnePlan instance.

If Logging in with a OnePlan Account

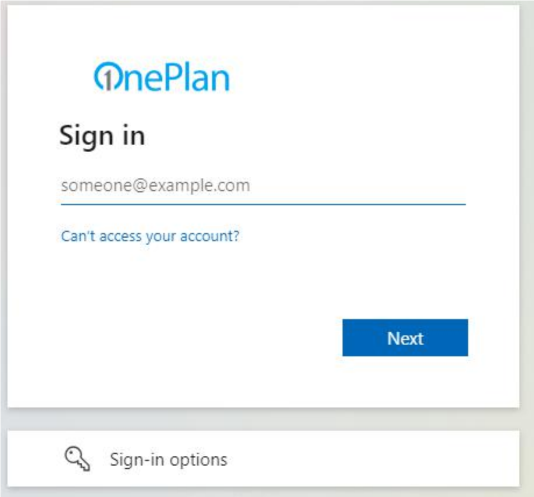
NOTE

Follow these instructions to access OnePlan using a OnePlan account. See see Create a OnePlan Account [17] for instructions to create a OnePlan account. These steps apply if your organization is using **Multi-Authenitcation** with **Forms** as an **Allowed Authenticator**. See Enable OnePlan Multi-Authentication for more information.

1. In the **Email** field, enter the email address you used to create your OnePlan account.
2. In the **Password** field, enter the password you created for your OnePlan account.
3. *(Optional)* Check the **Remember Me** check box. This means that, after you login to OnePlan the first time, you will continue to have access to OnePlan when you access it from same computer and browser. This access will be possible until you logout of OnePlan.
4. Click **Sign In**.

Log in to OnePlan with a Share With URL

If your organization is using **Office365 Strict** authentication, your manager or administrator may send you a link directly to your organization's OnePlan environment (see Share Your OnePlan Environment with the Share With Link [17] for instructions to get a sharable URL for your OnePlan environment). This link will send you directly to the Microsoft login page. From there, enter your Microsoft credentials as prompted.



IMPORTANT

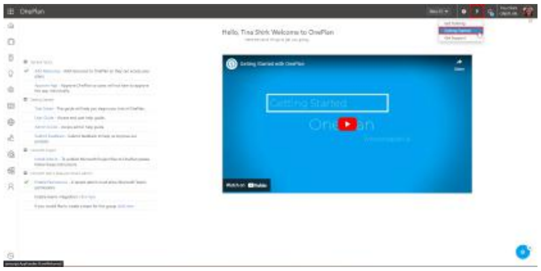
Be sure to keep the link for later use (bookmark, etc.) so you will always be sent directly to your organization's OnePlan instance, and you will not have to interact with the OnePlan login form.

Getting Started

The first time you log in to OnePlan, you are directed to the Getting Started "Welcome to OnePlan" page. This page includes an intro video to get you familiar with OnePlan.

Going forward, OnePlan will remember your last screen and open there each time you log in. To return to the Getting Started page at anytime,

1. Click on the Help Menu (**?**).
2. Select **Getting Started**.



Share Your OnePlan Environment with the Share With Link

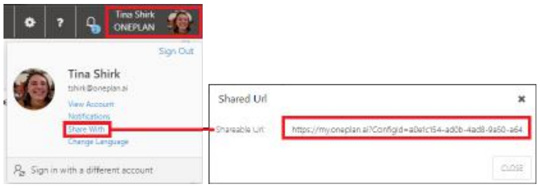
This article explains how to access the Share With link to provide users with a link directly to your organization's OnePlan environment.

You may want to have a link directly to your organization's OnePlan environment for many reasons, such as:

- If you are adding external users to your OnePlan tenant. See Add an external user to a OnePlan tenant for instructions).
- If your organization is using **Office365 Strict** authentication, and you want your users to be directed straight to your OnePlan environment. See Log In To OnePlan and Enable OnePlan Multi-Authentication for more information.

To get the Share With link to your OnePlan environment:

1. Click on the **User Menu**. Then select **Share With**. The **Shared URL** form will open.
2. Copy the URL from the **Shareable URL** field. This link will direct users directly to your organization's OnePlan environment.



Create a OnePlan Account

This article describes how to create a OnePlan account.

For an Existing OnePlan Group

If your organization has enabled multi-authentication for your OnePlan group, users are able to create a native OnePlan account to access and use OnePlan rather than using Office 365 authentication.

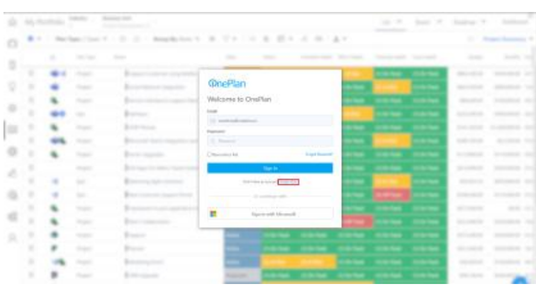
This feature can be particularly useful if you want to invite users to collaborate with you without requiring them to be added to your company's Microsoft 365/Azure Active Directory. These users can be contractors, customers, or whoever you would like to collaborate with who is outside of your company.

To create a OnePlan account for an existing OnePlan group:

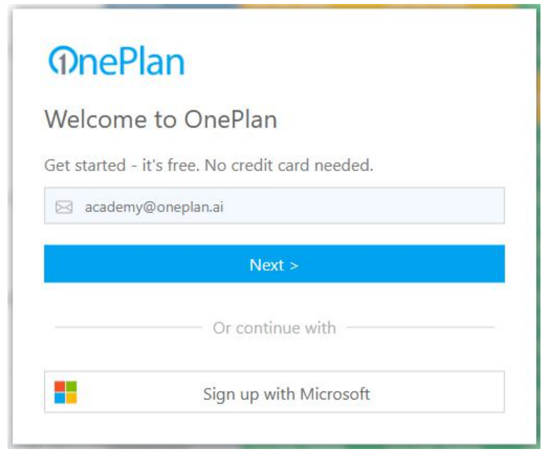
1. Follow the OnePlan invite link sent to you via email. This link will take you to the login page of your organization's OnePlan group.

2. On the login page, click **Create Account**. This will launch the account creation process.

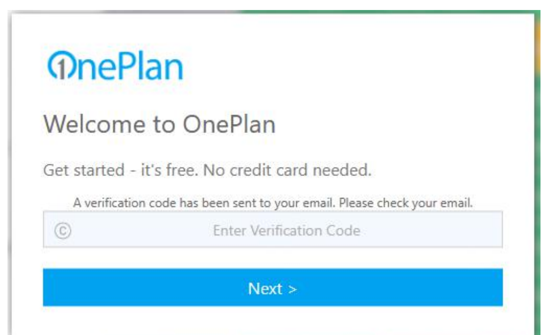
> **NOTE**
> At this step, you can also click **Sign up with Microsoft**, and connect any Microsoft account to this OnePlan group and use it to access OnePlan.



3. Verify your email address, then click **Next**.OnePlan will send a verification code to the listed email address.

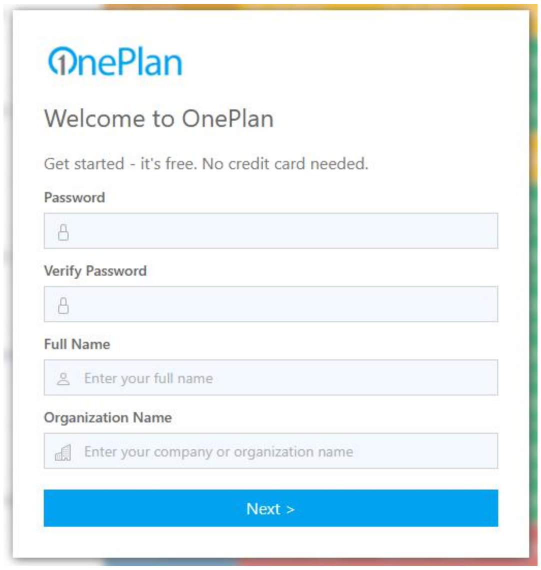


4. Go to your inbox and copy the verification code sent from OnePlan. Then, go back to OnePlan and paste the verification code into the **Enter Verification Code** field. Click **Next**.Enter the verification code from your email, and click **Next**.



5. Complete your OnePlan account setup by creating a password, and providing your name and organization. Then click **Next** to log into into OnePlan.

NOTE
Passwords must be at least 8 characters long, and contain upper and lower case letters, a number, and a special character.



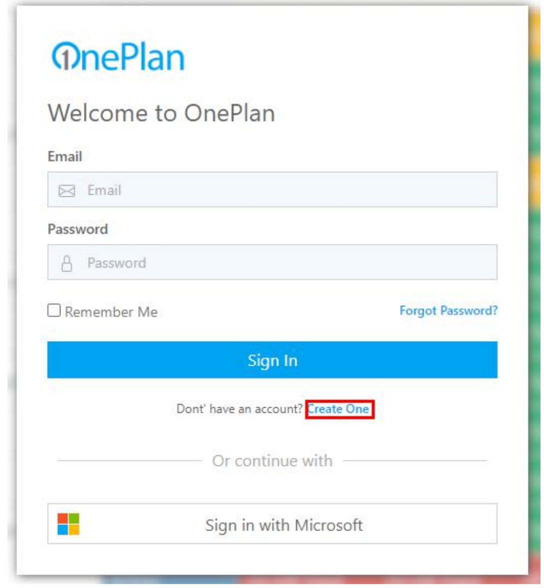
For a New OnePlan Environment

If you are not part of an organization that is using OnePlan, you can still create a OnePlan account. As part of the process, you will also create a OnePlan group. You need to create a new OnePlan group because the account you create will not be associated with any existing OnePlan group.

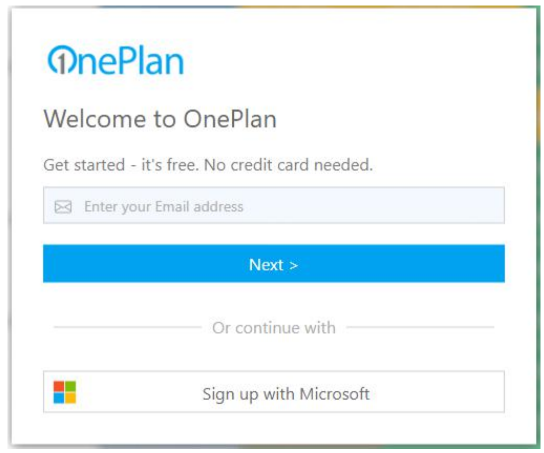
To create a new OnePlan account and group:

1. Go to OnePlan (my.oneplan.ai, ca.oneplan.ai, eu.oneplan.ai, au.oneplan.ai, us.oneplan.ai). You will be greated by the login page.
2. Click **Create Account**. This will launch the account creation wizard.

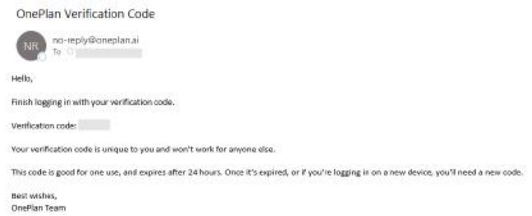
NOTE
At this step, you can also click **Sign up with Microsoft**, and connect any Microsoft account to this OnePlan group and use it to access OnePlan.

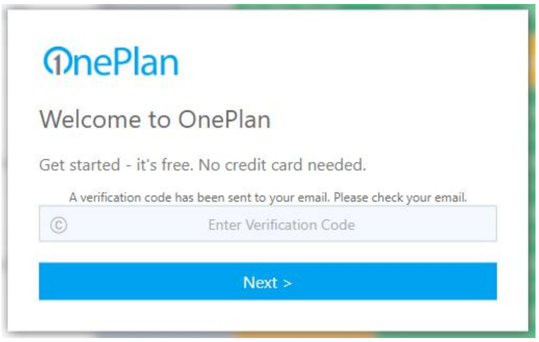


3. First, enter the email address you would like to use for your OnePlan account. Click **Next**. OnePlan will send out a uniqe varification code to the email address you just entered.



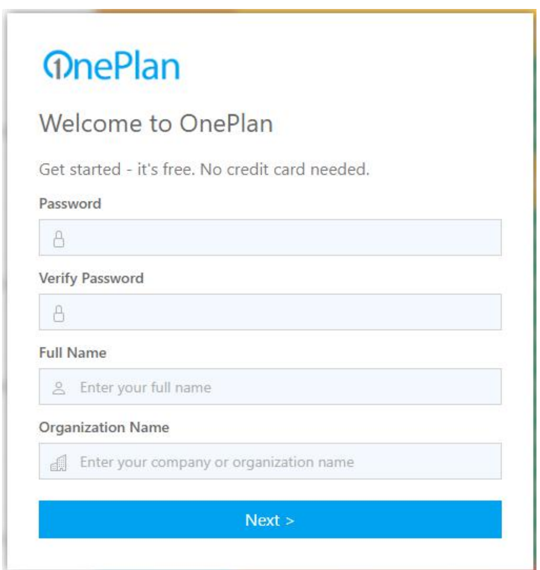
4. Go to your inbox and copy the verification code sent from OnePlan. Then, go back to OnePlan and paste the verification code into the **Enter Verification Code** field. Click **Next**.



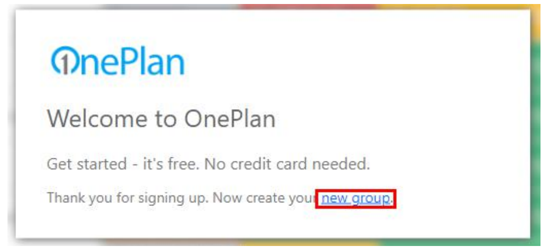


5. Complete your OnePlan account setup by creating a password, and providing your name and organization. Click **Next**.

> **NOTE**
> Passwords must be at least 8 characters long, and contain upper and lower case letters, a number, and a special character.



6. Your OnePlan account is now complete. However, the account is not connected to any OnePlan group, so you need to create a new OnePlan group. Click **New Group**.



7. Enter a name for your OnePlan group, determine if you would like to include sample data in this new group, and select the template you would like to use for this new group. Click **Create Group**. OnePlan will generate your new group and redirect you to the **Getting Started** page of your new OnePlan site. Now you can begin using OnePlan.

8. If you would like to add more people to your OnePlan environment, you will need to invite them. See Add Users to OnePlan for instructions. Then, those users need to follow the instructions in the For an Existing OnePlan Group [17] section of this article to create their OnePlan accounts.

OnePlan Minimum Software and Hardware Requirements

In order for OnePlan to work properly, users need to meet the following technology requirements, at minimum.

Software Requirements

Users need to create a a new Office 365 tenant to support the subscription(s) OR use an existing Office 365 tenant to support the subscription(s).

Users are required to use a supported web browser. Supported browsers are the most current versions of Chrome, Edge, and Firefox.

The table lists links to download a supported web browser or update your browser to the latest version. See the release notes for each browser for more information on their latest releases.

Table 1.

Browser	Download Browser	Update Browser	Release Notes
Chrome	Download Chrome	Update Chrome to the latest version	https://chromereleases.googleblog.com/
Edge	Download Edge	Update Edge to the latest version	https://docs.microsoft.com/en-us/deployedge/microsoft-edge-relnote-stable-channel
Firefox	Download Firefox	Update Firefox to the latest version	https://www.mozilla.org/en-US/firefox/releases/

Hardware Requirements

OnePlan is a web-based solution that will work on any modern computer. A modern computer has the hardware to support the latest version of Windows operating system (Windows 11) (and other modern OSs).

The table lists the basic hardware requirements to support OnePlan. See Windows minimum hardware requirements for more information.

Table 2.

Component	Minimum Requirement
Processor	1 GHz, 2 Cores
System memory	4 GB
Storage	64 GB

Recommended Browser Settings for OnePlan

We recommend a minimum of Windows 10.

Browsers supported: (latest versions)

- Edge
- Chrome
- Firefox

Please ensure that cookies and pop-ups are allowed.

How do I get around in OnePlan?

This article explains the main navigation icons and menus in OnePlan.

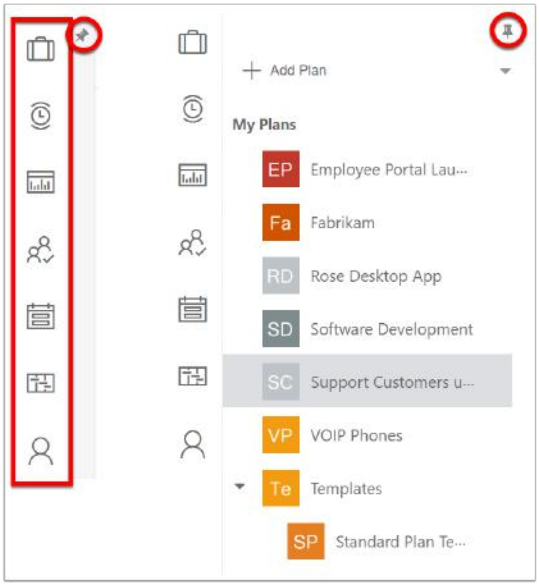
Navigation

The main navigation icons are along the left side of the screen. You may see some or all of these icons based on which apps or features have been added to your OnePlan group/environment.

Click an icon on the left-hand side to open that page. The Plans icon opens a panel showing all your plans (plans you manage and plans that have been shared with you).

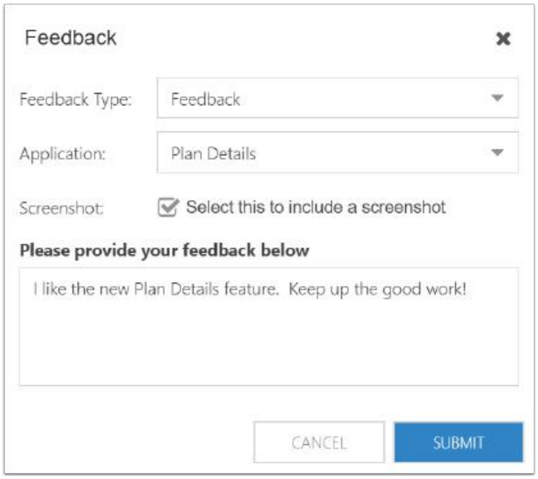
Click the push pin icon to lock the plans panel in place or hide it.

- **My Work** - This is where team members see what work items they have assigned and make updates to status, etc.
- **Timesheets** - This is where team members track time on work.
- **My Ideas** – This is where you can view the process step, state, priority, category, business unit, budget, and benefits of an idea.
- **My Strategy** – This is where you can organize your strategies by viewing the objective, priority, key results, and business unit. As well as seeing the status of the strategies whether they are On Track, At Risk, or Off Track.
- **Portfolios -** This is a view of all plans. Within the Portfolios page, analysis & prioritization may be done across the plans. The hierarchy of plans (such as portfolios to programs to projects or strategic themes to programs to epics) is visible here.
- **Resource Plan -** This is where resource managers see the allocation of their resources to all plans. The resource managers can analyze and adjust their team's commitments as needed.
- **Scheduler -** This is where resource managers see the work assignments of their resources to all plans. The resource managers can analyze and adjust their team's work as needed.
- **Status Reports** – This where open and submitted reports can be viewed. Based on report date and report status.
- **Resource Center** - This is the page that shows all the named & generic resources in your OnePlan group.



Header Menu

Provide Feedback



What do the Colors Signify?

Allocation Bars

The colored bars are based on percentage of a resource's allocation of work.

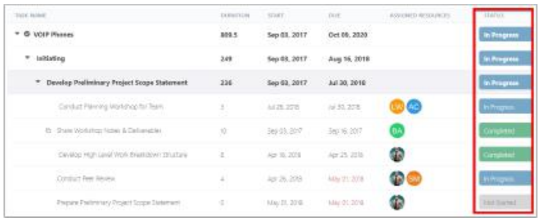
- Red: Over allocated. Booked more than 110%
- Yellow: Over allocated. Booked between 100-110%
- Green: Booked 100%
- Blue: Resource has availability. Booked less than 100%
- Gray: No allocated hours, 0%

Task/Booking Bars

The Task (i.e. Booking/Engagement) bar colors are based on the item's status.

- Gray: Not Started
- Blue: In Progress
- Green: Completed

Plan Grid



Resource Scheduler

OnePlan Licensing Capability Matrix

This article describes the OnePlan capabilities available to users based on their licensing and permissions.

OnePlan Capabilities Matrix by License Type

For more information about OnePlan licenses, and to purchase OnePlan, please go to https://oneplan.ai/pricing/.

Capability	$ Enterprise Contributor	Executive	Manager	Owner	$ Team Member Plus	Free Team Member	Free Report Viewer
Insights AI	X	X	X	X	X	X	
Portfolio Plan	Only available for Plans created by user or shared with user	Read only, all Plans	X	X			
Plan Details	Only available for Plans created by user or shared with user	Read only, all Plans	X	X	Read only, Plans assigned to or shared with the user		
Resource Plan	Only available for Plans created by user or shared with user	Read only, all Plans	X	X			
Financial Plan	Only available for Plans created by user or shared with user	Read only, all Plans	X	X			
Work Plan	Only available for Plans created by user or shared with user	Read only, all Plans	X	X	Read only, Plans assigned to or shared with the user		
My Work	X	X	X	X	X	X	
Status Reports	X	X	X	X			
Timesheets	X	X	X	X	X		
Reporting	X	X	X	X	X	X	X
Advanced Reporting	X	X	X	X			
Visualizer	X	X	X	X			
Portfolio Modeler	X	X	X	X			
Auditing	X	X	X	X			
Integrations	$	$	$	$			
Accelerators	$	$	$	$			

- Team Member - This permission level will require either Team Member or Team Member Plus license.
- Contributor - This permission level will require Enterprise license.
- Executive - This permission level will require Enterprise license.
- Manager - This permission level will require Enterprise license.
- Owner - This permission level will require Enterprise license.

OnePlan User Permissions

Permission Levels

- **None:** The user does not have access to OnePlan. The user is still available in the Resource Center to be used for scheduling and resource planning.
- **Requestor:** The user has access to the Requests area. The user can submit requests.
- **Team Member:** The user has access to My Work, Insights and Reporting areas in OnePlan. The user can update statuses of items in their work.
- **Team Member Plus:** The user has access to My Work, Insights, Timesheets, Reporting. The user can update statuses of items in their work. **NOTE:** Team Member and Team Member Plus users both appear as "Team Member" in OnePlan. The different permissions are differentiated on a license-level.
- **Contributor:** The user can create plans and plan content, but can only see plans that they have created.
- **Executive:** The user has read-only access to all plans and plan content.
- **Manager:** The user can create plans and plan content. The user can view and edit all plans and plan content.
- **Owner:** The user can create plans and plan content. The user can view and edit all plans and plan content. The user can access and configure OnePlan administration settings.

Licensing Required by Permissions

See OnePlan User Permissions [23] for more information on user permissions.

Permissions and OnePlan Licenses

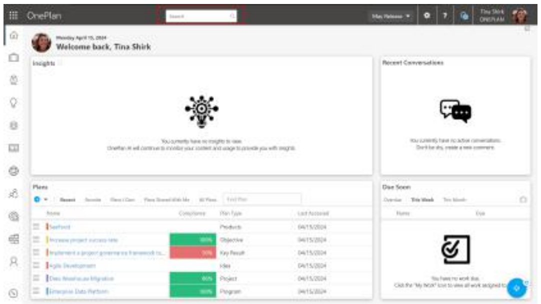
Resource Status	Permissions	OnePlan License	Description
Active	Owner, Manager, Executive, Contributor, Team Member	Consumes a license	The resource can be utilized for resource planning, and has access to OnePlan.
Active	None	Does not consume a license	The resource can be utilized for resource planning, but does not have access to OnePlan.
Inactive	None	Does not consume a license	The resource cannot be utilized in resource planning, and does not have access to OnePlan.

Global Search

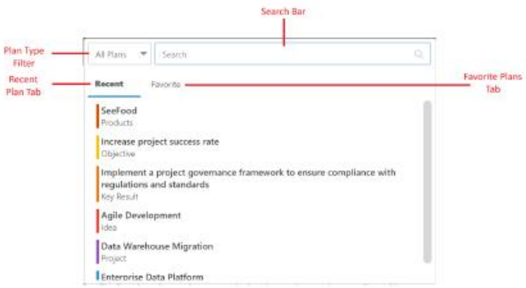
Search for Plans with the Global Search Bar

This article explains how to use the Global Search Bar to easily locate and navigate to your plans from any screen within OnePlan.

The Global Search Bar is located in the top ribbon of OnePlan, and can be accessed from any page in the application.

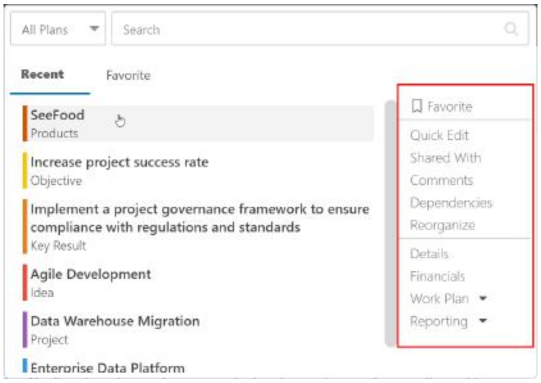


When you click into the Search bar, the search interface will open up. In this interface, you will find:

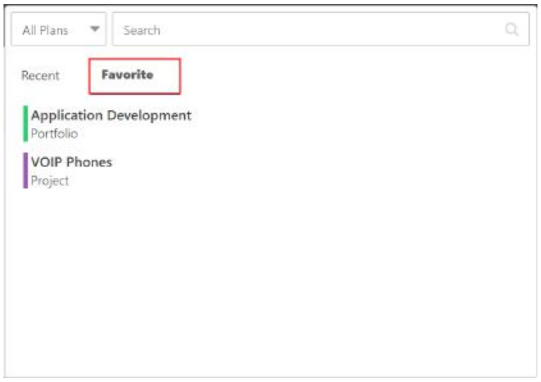


- **The Plan Type filter**: You can narrow your search to specific plan types, such as projects, Ideas, etc. by selecting the desired plan type from the Plan Type filter, and then entering the plan name into the search bar.
- **The Search bar**: Enter the name of the plan you would like to access into the search bar. Then press enter on your keyboard to launch the search.
- **The Recent Plans tab**: Plans that you have recently accessed will be listed under the Recent tab.
- **The Favorite Plans tab**: Plans that you have marked as a favorite will be listed under the Favorites tab.

Hover over a plan name to open the contextual menu. From this menu, you can access all modules within the plan, such as the Work Plan, Financial Plan, Resource Plan, Plan Details, and Reports. You can also add comments to the plan, mark it as a favorite, share the plan, reorganize the plan, and manage the plan's dependencies.

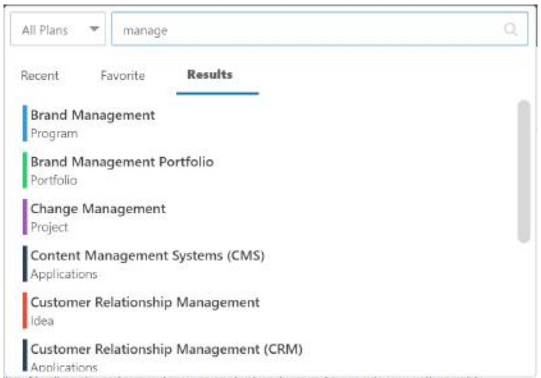


By default, the Search interface displays your recently accessed plans. Click on the Favorite tab to access any plans that you have marked as a favorite.

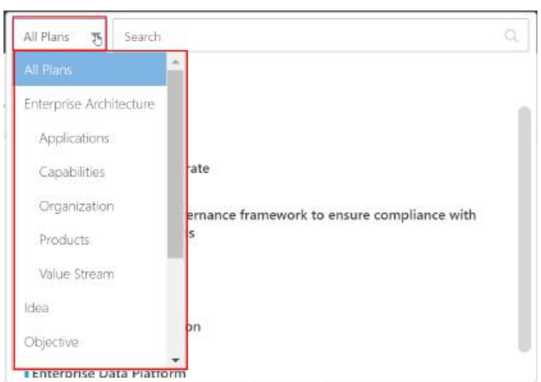


To search for a plan in your OnePlan group, enter the part, or all, of the plan name into the Search bar, and press enter on your keyboard. A Results tab will appear with a list of all of the plans in your environment that match the search query.

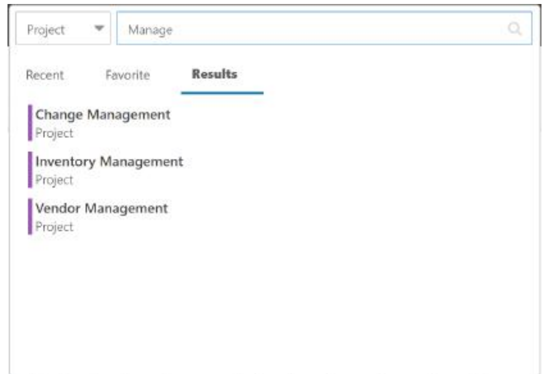
In this example, I searched for plans with the word "manage" in their name.



You can narrow down the search by using the Plan Type filter. Click on the filter and select the desired plan type. You can only select one plan type at a time. Then enter the name of the plan into the search bar and press enter on your keyboard. The Results tab will contain plans that match the search query and selected plan type.



In this example, I searched for Projects with the word "manage" in the title.



OnePlan Home Page

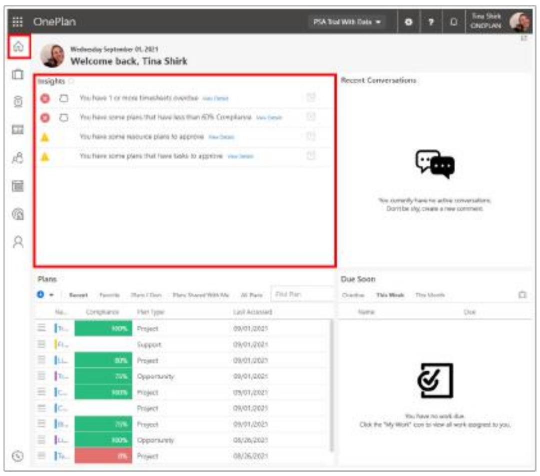
Home Page Insights

This article explains what Insights are, and how to manage them on your OnePlan Home Page.

Insights notify you about plan items that require your attention. The Insights on your home page come from the work items and plans that are assigned to you, so you only get notifications for your own work.

Access Your Insights

Go to the **Home** page from the side navigation. The **Insights** panel is located in the top right corner of the **Home** page.



Types of Insights

There are several different kinds of insights. Insight notifications have different levels of severity Less severe insight notifications can be escalated to more severe insights if the issue is not addressed in a set amount of time.

Table 3.

Icon	Insight Type	Meaning
	Information Insight	The item is for information only. There are no actions that need to be taken. *Example: A reminder that your timesheet is due tomorrow.*
	Warning Insight	The item is an issue but is not urgent. If not addressed, the warning will be escalated to a problem. *Example: A reminder that your timesheet is due today.*
	Problem Insight	The item is causing issues for the plan and must be addressed. *Example: A notification that your timesheet is overdue.*
	Compliance Insight	These work items are used in compliance calculations and must be addressed for the plan to remain in compliance. *Example: A plan has not been updated in a specified number of days.*

Manage Insights

Click **View Details** to see all work items that need your attention.

Click **Refresh** to update your Insights in real-time. This will pull any updates from relevant plans and tasks into your Home Page, so you know what is going on at all times.

Click **Snooze** to remove the Insight from your Insight list. The Insight will reappear the next time Insights are refreshed if it has not been addressed.

https://player.vimeo.com/video/738665209

Home Page Plans

This article explains how to use the Plans panel on your OnePlan Home Page.

The **Plans** panel on the home page lets you quickly view or search recent plans to pick up your work right where you left it.

Tabs and Search Bar

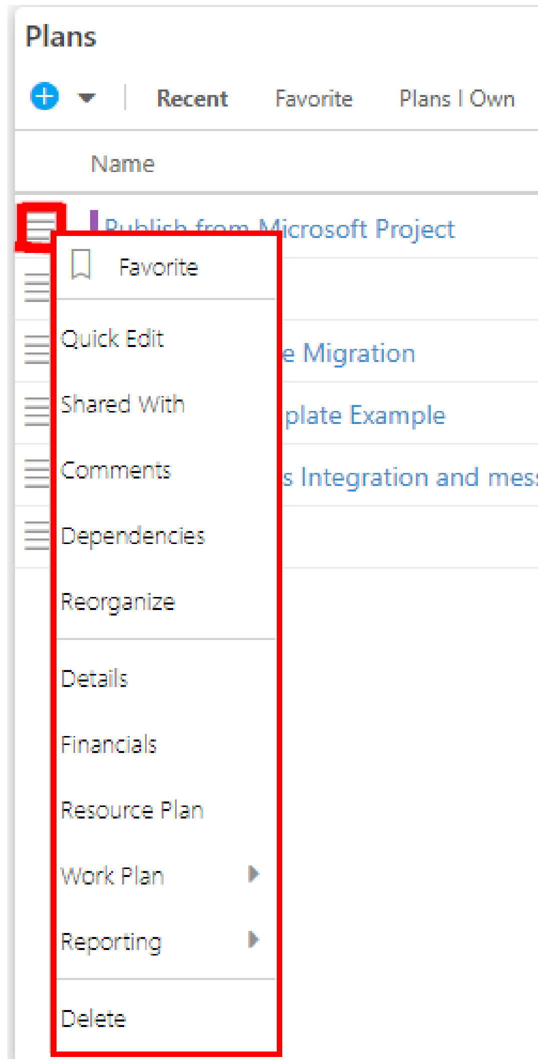
The Plans panel has several tabs to help you quickly find the plan you need. These tabs include:

- **Recent**: Displays your most recently accessed plans.
- **Favorite**: Displays all plans that you have marked as a favorite.
- **Plans I Own**: Displays all plans that you are an owner of.
- **Plans Shared With Me**: Displays all plans that have been shared with you by another plan owner.
- **All Plans**: Displays all plans in your OnePlan environment that you have access to.

There is also a search bar that allows you to search each tab in the **Plans** panel. This search function is particularly useful if there are a lot of plans listed in a tab, such as in the **All Plans** tab. Simply begin typing in the name of the plan, and the plans will begin to filter based on your search.

Contextual Menu

Select the contextual menu for a plan to see the available planning modules and options for that plan.



- **Favorite**: Click **Favorite** to mark the selected plan as a favorite. This plan will then be listed in the Favorites tab of the Plans Panel on your Home Page.
- **Quick Edit**: Select **Quick Edit** from the plan's contextual menu. On the right side of the screen, the plan details form appears, condensed to one column. Scroll up and down for the plan fields. Click the **Expand** icon to open a larger view of the plan details form. The form is editable and your edits save automatically.
- **Shared With**: Click **Shared With** from the contextual menu to quickly access a plan's Shared With form. The Shared With form lists all of the users who have access to a particular plan, along with their plan-level permissions.

- **Comments**: Click **Comments** to add a comment or access an existing comment thread for that plan.
- **Dependencies**: Click **Dependencies** to access the plan dependencies form. From this form, you can view and manage dependencies between your various plans. See Portfolio Dependencies: Manage Dependencies Between Plans for instructions on how to manage these inter-plan dependencies.
- **Reorganize**: Click **Reorganize** to reorganize the selected plan anywhere in your OnePlan group. Using the Reorganize function, you can change the plan type of the plan, and its place in your OnePlan hierarchy. The Reorganize function does not retain any historical information about the plan's previous type or location. It is simply a "lift-and-shift" function.
- **Details**: Click **Details** to jump directly to the selected plan's Plan Details Form.
- **Financials**: Click **Financials** to jump directly to the selected plan's Financial Plan.
- **Resource Plan**: Click **Resource Plan** to jump directly to the selected plan's Resource Plan.
- **Work Plan**
  - **List**: Click **List** to jump directly to the selected plan's Work Plan List view.
  - **Board**: Click **Board** to jump directly to the selected plan's Work Plan Board view.
- **Reporting**
  - **Status Reports**: Click **Status Reports** to jump directly to the selected plan's Status Reports.
  - **Visualize**: Click **Visualize** to jump directly to the selected plan's Visualizer.
  - **Insights**: Click **Insights** to jump directly to the selected plan's Plan-Level Insights page.
  - **Dashboard**: Click **Dashboard** to jump directly to the selected plan's Power BI Reporting Dashboard.
- **Delete**: Click **Delete** to access the **Delete and Archive** form. Here, you can either completely delete the selected plan (including all associated data), or archive the plan, which enables your administrator the ability to restore that plan at a later date.
  See Delete or Archive a Plan for more information.

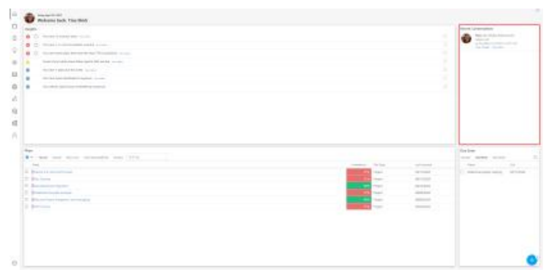
Create a New Plan

You can use the **New Item** icon in the Plans section of the Home Page to create a new plan. See Create a New Plan for more information.

Home Page Recent Conversations

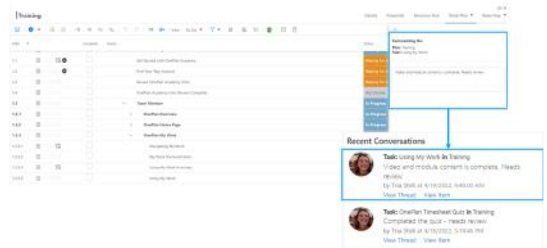
This article explains how to use the Recent Conversations section of your OnePlan Home Page.

The conversation threads on your home page come from the work items that are relevant to you, so you can quickly get updates on your work.



Recent comments update on the Home Page

Comments made on your work items in the plan will automatically update in the **Recent Conversations** panel on the home page.

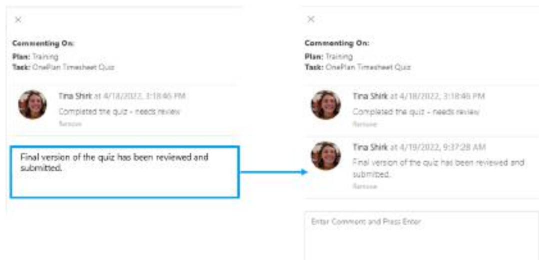


Add to the Conversation

You can quickly add to a conversation from your home page.

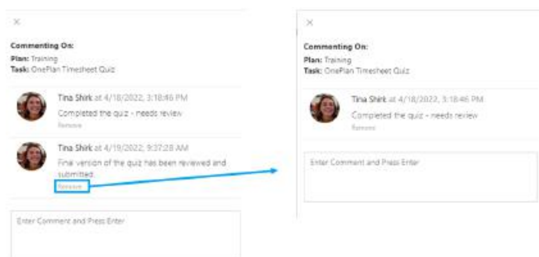
Click **View Thread** to see the entire conversation.

Then type in your comment in the field and press Enter. The new comment will appear in the conversation on your home page and in the plan itself.



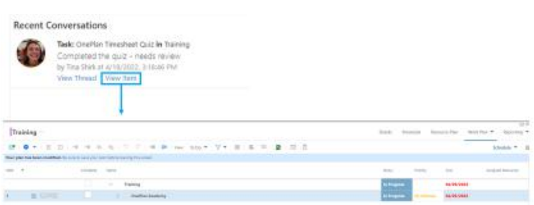
Remove Comments

To remove a comment from a thread, simply click **Remove**. Then confirm the removal.



Go to the related work plan

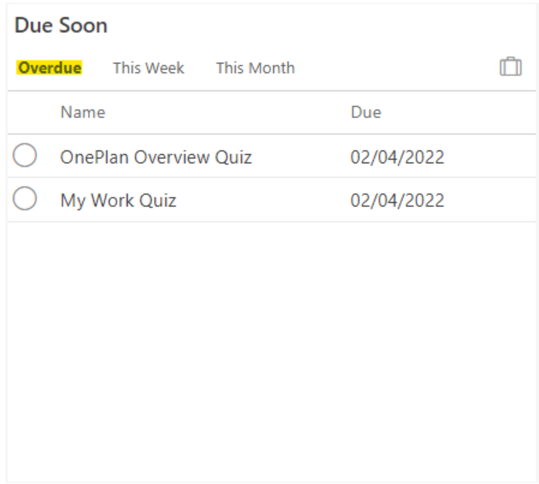
You can jump right to a plan from a comment. Click **View Item** to go to the related plan.



Home Page Due Soon

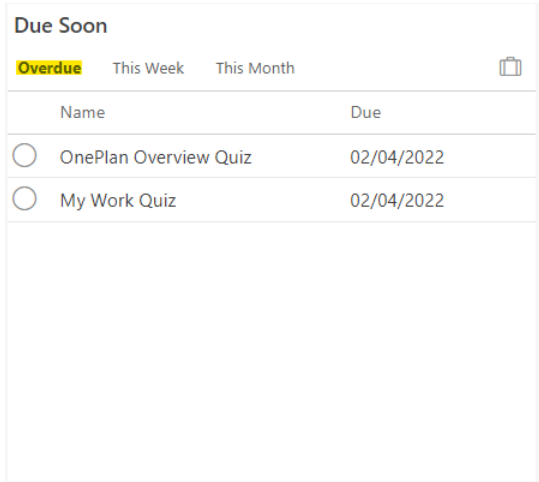
This article explains how to use the Due Soon section of your OnePlan Home Page.

The Due Soon panel on your home page gives you a quick view of upcoming and overdue tasks.



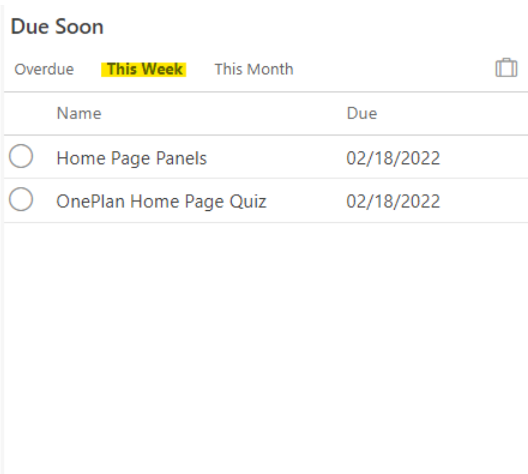
Overdue Tab

The **Overdue** tab lists all of your tasks that have due dates in the past.



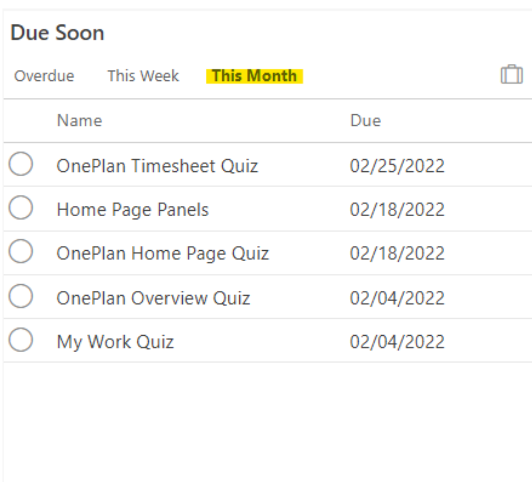
This Week Tab

The **This Week** tab lists all of your tasks that have due dates in the next 7 days.



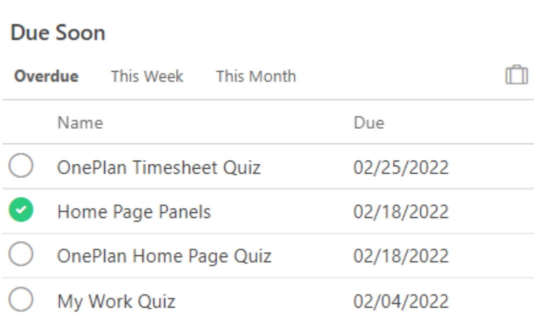
This Month Tab

The **This Month** tab lists all of your tasks that have due dates in the next 30 days.



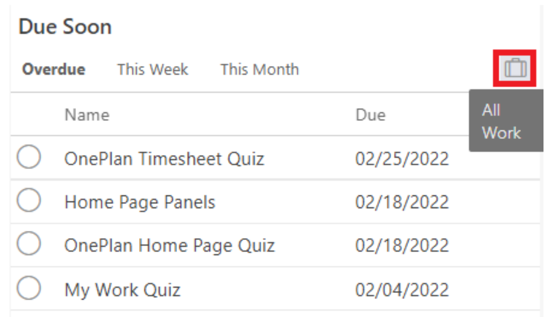
Mark Tasks Complete

You can mark tasks complete by checking the check box next to the desired task.



Access All of your Work

You can access all of your work items in the **My Work** area by clicking the briefcase icon.



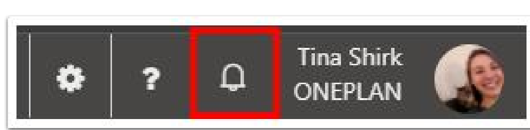
Notifications

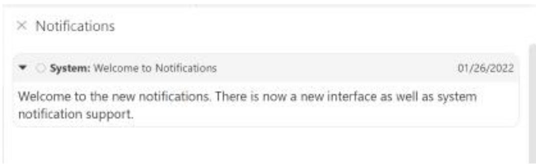
This article explains OnePlan notifications.

> **NOTE**
> To manage your notification settings, see Manage Resource Notification Settings [253].

> **NOTE**
> System notifications will not be sent to users marked as inactive.

Notifications are located in the header menu in OnePlan. A blue dot will appear next to the **Notifications** icon when you have a new notification. If you have more than one notification, the blue dot will be labeled with the total number of unread notifications. You will also receive an email with the notification.





Types of Notifications

OnePlan will push out system notifications when there are updates to the system such as releases, scheduled maintenance, etc.

Depending on your organization's OnePlan configuration and your role, you can receive the following interface notifications:

- **Welcome to OnePlan:** You will receive this notification when you begin using OnePlan.
- **You have been invited to OnePlan:** You will receive this notification when you are invited to a OnePlan group.
- **{From.Name} has shared the {Plan.Name} plan with you**: You will receive this notification when someone shared a plan with you.
- **New comment:** You receive a new comment notification when someone makes a comment on one of your tasks.
  You will receive a new comment notification in the following scenarios:
  - If you start a comment/thread, you will receive notifications about comments on that task/ thread going forward.
  - If you have previously commented on a task, you will receive notifications about comments on that task/thread going forward.
  - If you are a resource assigned to a task that is commented on, you will get a notification about that comment.
  - If you are a plan owner and someone comments on your plan, you will get a notification about that comment.
  - If you are a plan owner and a task in your plan is commented on, you will get a notification about that comment.
- **Update {Plan.Name} plan in OnePlan:** You will receive this notification when you need to update tasks.
- **Time off requested:** You will receive this notification if you are an approver and someone has submitted a time off request. See Time off request notifications and approvals for more information on who should receive these notifications.
- **Time off approved:** You will receive this notification when your time off request has been approved.
- **Resource requested:** You will receive this notification if you are a resource manager and someone has requested a resource for a task.
- **Resource request approved:** You will receive this notification if your resource request has been approved.
- **Resource request rejected:** You will receive this notification if your resource request has been rejected.
- **New status reports:** You will receive this notification when there is a new status report available for you to review and submit.

Timesheets

Enter Time on My Timesheet

This article explains how to enter time using the OnePlan timesheets.

NOTE

Resources must be assigned a role to import timesheet hours into the resource plan.

Access Your Timesheet

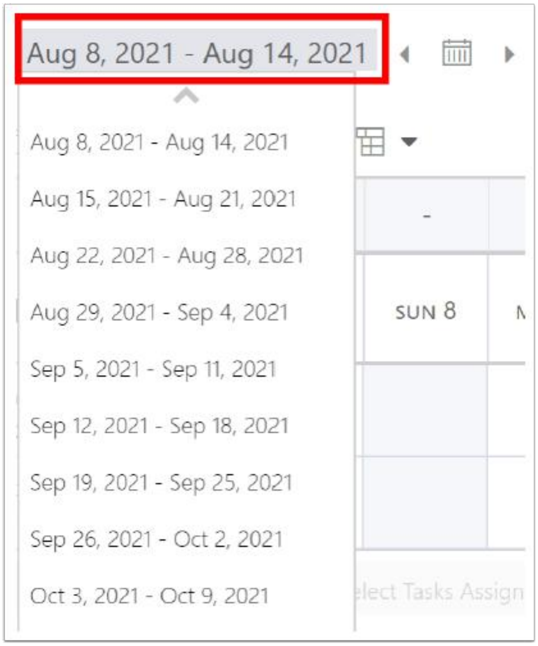
Click on the Timesheets icon in the navigation. You will begin in the "Time Entry" mode. This is where Team Members track time on their work assignments.

Any items that are assigned to you and are scheduled during the current time period will automatically load into your timesheet the FIRST TIME you open the timesheet for that period. You will need to import or add additional timesheet times the next time you log into your timesheet.

Change Timesheet Periods

When you first go to your timesheet, you'll navigate to the current timesheet period. If needed, you may navigate to another timesheet period.

Click on the period dates. A drop down will show all open/unlocked timesheet periods. If the admin has locked a period, you can no longer navigate to it.



Use the period navigation icons to quickly move to the **previous** period, the current/"**today**" period, or the **next** period.

Copy or Import Timesheet Items

The OnePlan timesheet allows you to import any work items that are assigned to you to make management of your tasks easy. Additionally, the OnePlan timesheet allows you to copy your timesheet from one time period to another to simplify management and time tracking on repetitive tasks.

To copy or import timesheet items into your timesheet:

1. Click the Copy Timesheet icon .
2. Select the desired copy or import method:
   - **Copy From Previous Period:** Select to copy items from the previous timesheet period into the current timesheet period. This will overwrite any existing entries for this period.

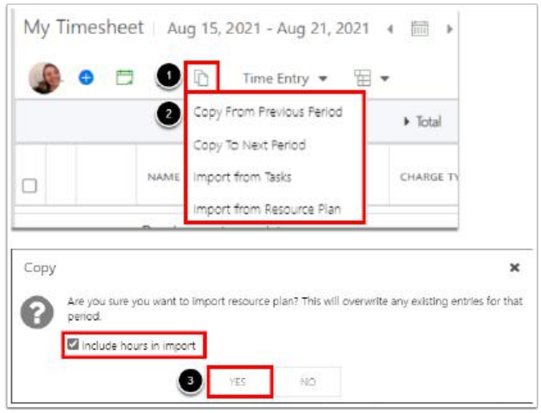
- **Copy To Next Period:** Select to copy items from the current timesheet period to the next timesheet period. This will overwrite any existing entries for that period.
- **Import from Tasks:** Select to import any tasks to your timesheet you are currently assigned to for the current period.
- **Import from Resource Plan:** Select to import items that have been assigned to you in the Resource Plan. This will overwrite any existing entries for that period.

> **NOTE**
> The timesheet will automatically import any tasks assigned to you the FIRST TIME you access the timesheet for the current period. After the first time, you will need to use the **Import from Tasks** or **Import from Resource Plan** functions to bring in any additional tasks that are assigned to you in the current timesheet period.

3. Click **YES** on the warning pop up to confirm the copy.

> **NOTE**
> If using the Import from Resource Plan method, check the "Include hours in import" check box to import hours from the Resource Plan into the timesheet.

> **IMPORTANT**
> When copying work items from one period to another, work items that are no longer assigned to you (and the plan is set to only allow adding time to assigned work items) will not be copied.



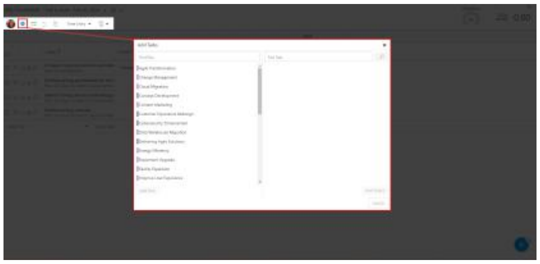
Add Tasks and Work Items to Your Timesheet

> **IMPORTANT**
> If a Plan is open to the team or assigned to specific individuals, only team members or those assigned to the plan will have the ability to add time. This restricts access for Managers and Owners, ensuring that time entry is limited to those directly involved with the Plan, contributing to a more focused and controlled time-tracking process.

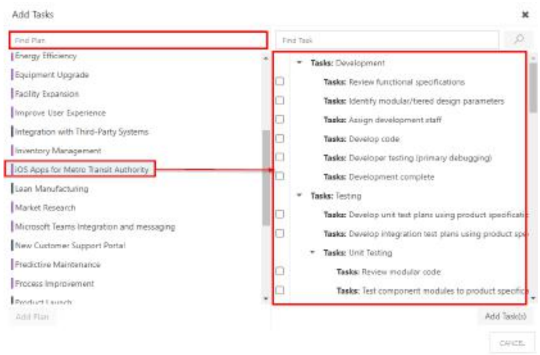
There are multiple methods to add a task to your timesheet.

Add Timesheet Items Using the Add Item Button from the Header

1. Click the **Add Item** icon ⊕. The **Add Tasks** window will open.



2. Search for and select the desired plan. Either type in the plan name into the **Find Plan** field, or select a plan from the list of plans. The Task section of the form will populate with all of the available tasks from the selected plan.



3. Search for and select the desired task. Either type in the task name into the **Find Task** field, or select a task from the list of tasks.

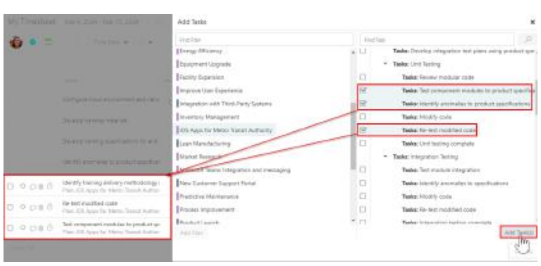
NOTE

You can select multiple tasks to add into your timesheet.

NOTE

The timesheet interface excludes check boxes next to work items, like summary tasks, that cannot be added to your timesheet.

4. Click **Add Task(s)** to add the selected task(s) to your timesheet.



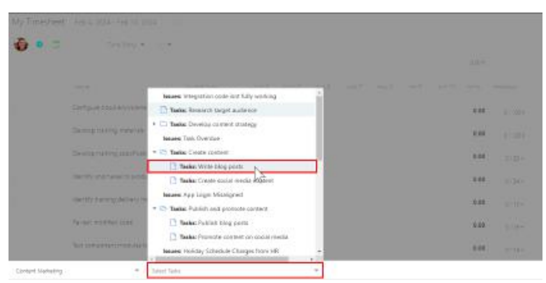
Add Timesheet Items Using the Add Item Bar at the Bottom of the Timesheet

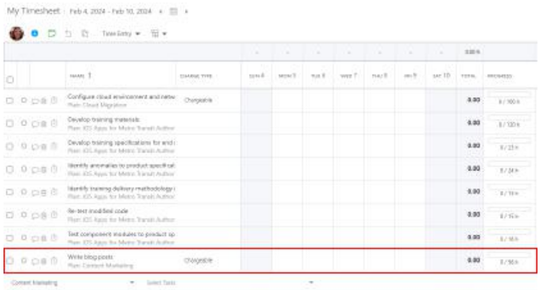
1. Search for or select the desired plan. Either type in the plan name into the **Select Plan** field, or open the drop down menu and select a plan from the list of plans.

2. Select the desired task from the **Select Tasks** drop down menu. When a task is selected, it will be added to your timesheet.

NOTE

Tasks that are eligible to be added to your timesheet have a paper icon next to them . Summary tasks, which cannot be added to your timesheet, have a folder icon next to them . When a summary task is collapsed the folder icon is closed, indicating there are child tasks below the item .





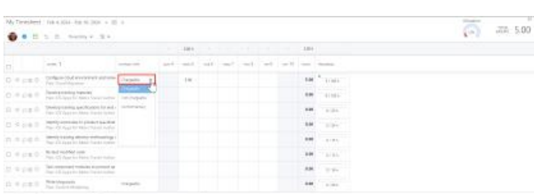
Track Time in Your Timesheet

Now that you have all of your tasks in your timesheet, you need to enter the time you actually spend on these tasks.

1. Click into the desired date cell for a timesheet item. When you click in a cell, the task info pops open on the right side with the following: Plan, Task, Date, Hours, and Notes. Enter your time value directly into the cell or into the Hours field in the task pop up on the right.

2. Some timesheet entries require you to provide additional information about your entries, such as the Charge Type (indicating whether your time entries for that task are chargeable or not). Select the appropriate values for the additional fields if required.

> **NOTE**
> Additional fields vary by organization and are setup by your administrator.



3. Once your time entries are complete, submit your timesheet for review.

Submit Your Timesheet

Once your timesheet is complete, you need to submit it for review.

1. Check the check box next to the timesheet rows you would like to submit for review.
2. Click the **Submit** icon in the timesheet header. The selected timesheet rows will be sent off to your timesheet manager for review and approval.

> **NOTE**
> Once a row is submitted, it is no longer editable. If needed, you may select the row and click **Recall** to edit.

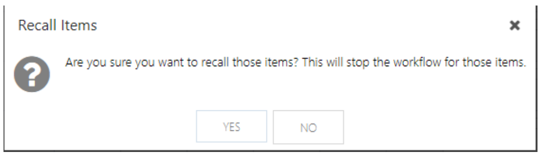
Recall Your Timesheet

If you have submitted your timesheet for review, but need to make changes, you can recall timesheet rows to edit your entires;

> **NOTE**
> You cannot recall approved timesheet rows.

1. Check the check box next to the timesheet rows you would like to submit for review.

2. Click the **Recall** icon ⮌. Confirm that you want to recall the selected timesheet items. Once confirmed, the selected timesheet row(s) will be recalled and become editable.

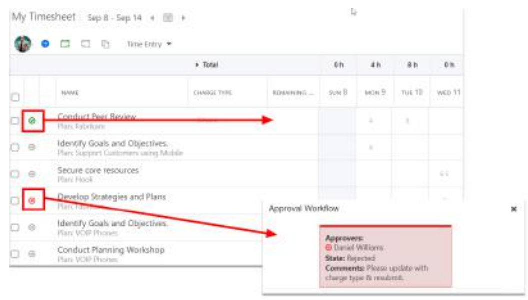


3. Once your edits are complete, resubmit the edited timesheet rows.

View the Timesheet Workflow Status

> **NOTE**
> Based on your organization, timesheets may be set to auto-approve.

When your timesheet manager has approved or rejected your timesheet entries, you will see the updated status icon in your timesheet. Click on the icon to see the workflow status and any approval/rejection notes. Then, if required, recall any rejected timesheet items and update the timesheet accordingly.

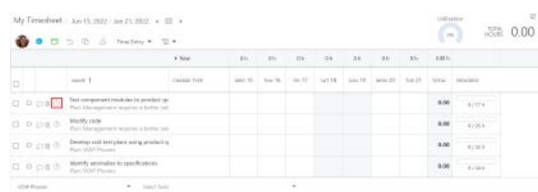


Use the Stopwatch to Record Time in Your Timesheet

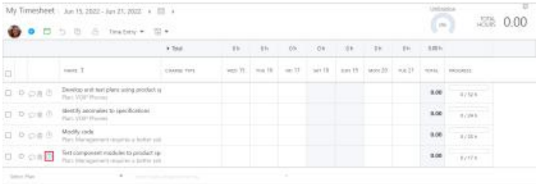
This article explains how to use the stopwatch feature of the timesheet to record time.

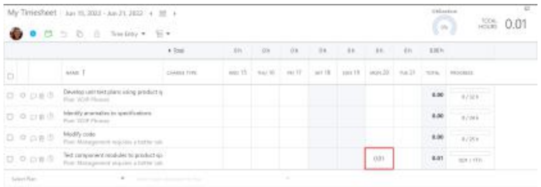
1. To start the stopwatch, click the stopwatch icon ⏱ next to the desired task. Then confirm that you would like to start the stopwatch.

> **NOTE**
> There can only be one active stopwatch at a time. Starting a new stopwatch will cancel any previous stopwatches.



2. Work on your task. You can navigate away from or close the OnePlan tab. The stopwatch will continue to record time.
3. To stop the stopwatch, click the highlighted stopwatch icon ⏱. Then confirm that you would like to stop the stopwatch. The time recorded by the stopwatch will populate the timesheet for the selected task and current date.





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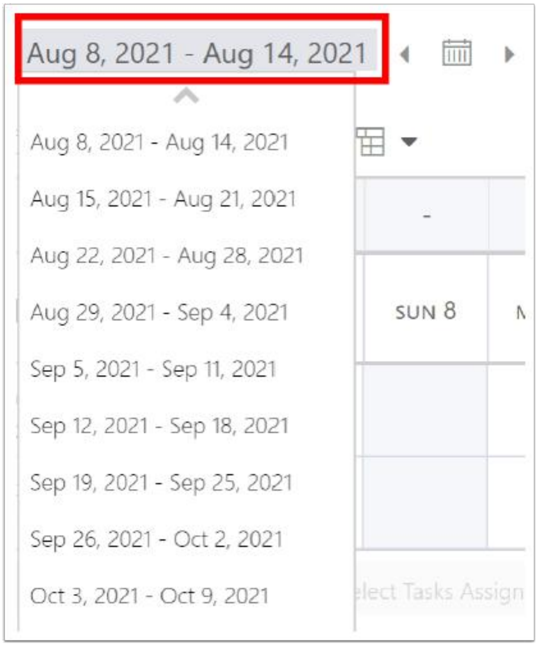

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3. Click **YES** on the warning pop up to confirm the copy.

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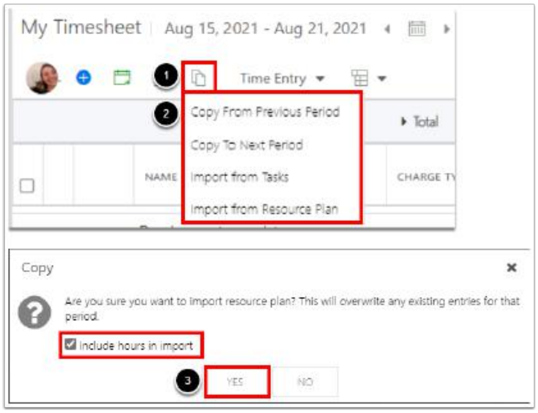

Add Tasks and Work Items to Your Timesheet

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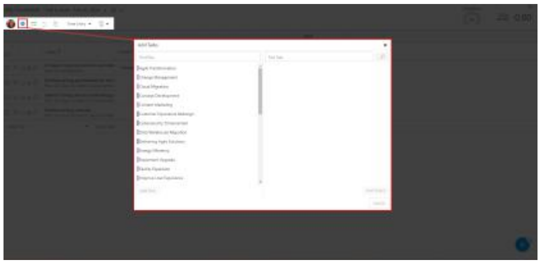

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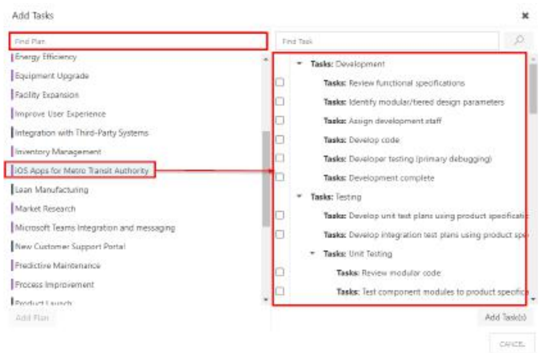

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> You can select multiple tasks to add into your timesheet.

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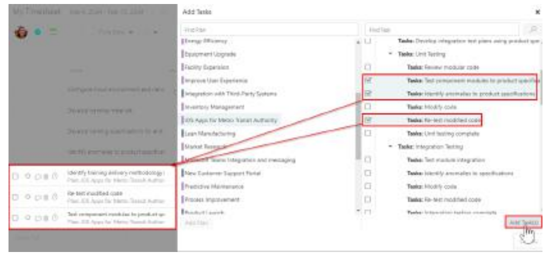

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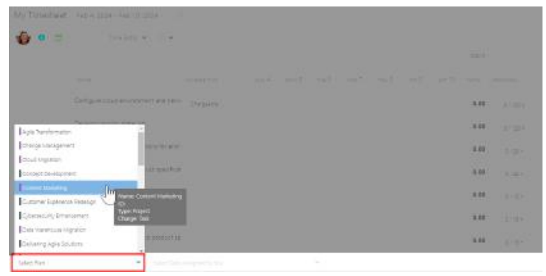

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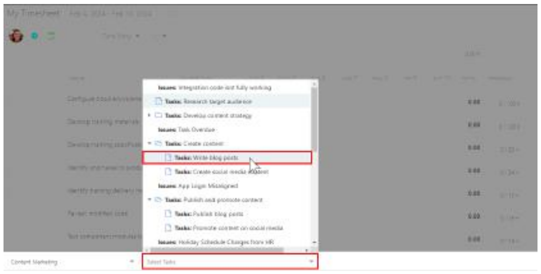
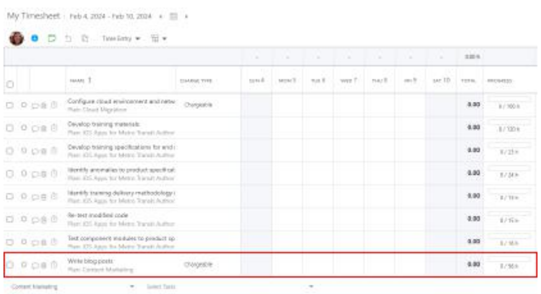
> Tasks that are eligible to be added to your timesheet have a paper icon next to them. Summary tasks, which cannot be added to your timesheet, have a folder icon next to them. When a summary task is collapsed the folder icon is closed, indicating there are child tasks below the item.





Submit Your Timesheet

Once your timesheet is complete, you need to submit it for review.

1. Check the check box next to the timesheet rows you would like to submit for review.
2. Click the **Submit** icon in the timesheet header. The selected timesheet rows will be sent off to your timesheet manager for review and approval.

NOTE

Once a row is submitted, it is no longer editable. If needed, you may select the row and click **Recall** to edit.

Recall Your Timesheet

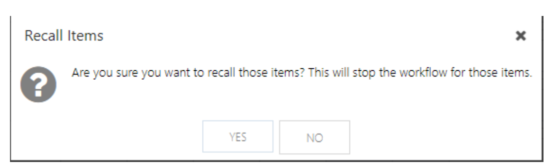
If you have submitted your timesheet for review, but need to make changes, you can recall timesheet rows to edit your entires;

NOTE

You cannot recall approved timesheet rows.

1. Check the check box next to the timesheet rows you would like to submit for review.

2. Click the **Recall** icon. Confirm that you want to recall the selected timesheet items. Once confirmed, the selected timesheet row(s) will be recalled and become editable.



3. Once your edits are complete, resubmit the edited timesheet rows.

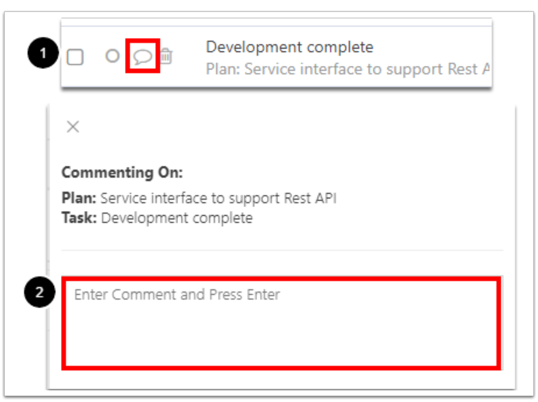
Make a Comment on a Task or Project from the Timesheet

To make a comment on a task or project from the timesheet:

1. Click the **Comments** icon. The **Comment** window will open.

> **NOTE**
> You can view all previous comments on the task or project in the **Comment** window.

2. In the **Comment** window, enter your comment.
3. Press **Enter** to submit your comment.

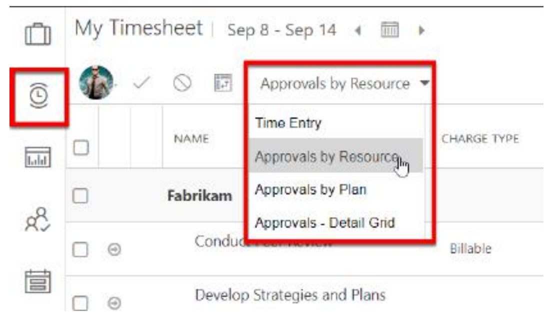


Review and Approve Timesheets

This article explains how to use the Timesheets feature as a Manager, someone who is reviewing and approving time tracked on plans & tasks.

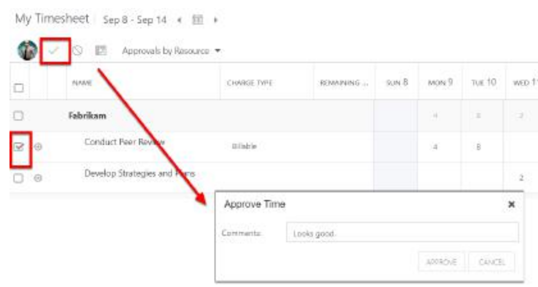
Navigate to Timesheets

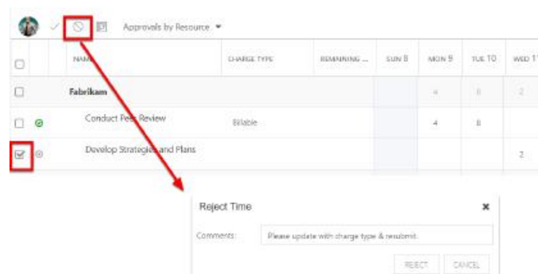
Click on the Timesheets icon in the navigation. You will begin in the "Time Entry" mode. This is where Team Members track time on their work assignments. To switch to Approval mode, select the desired approval view.

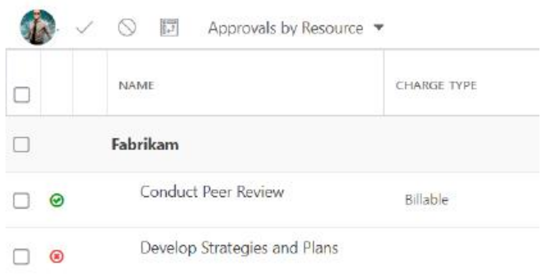


Select Items to Approve or Reject

Select one or multiple items to approve or reject. A comments window will open.

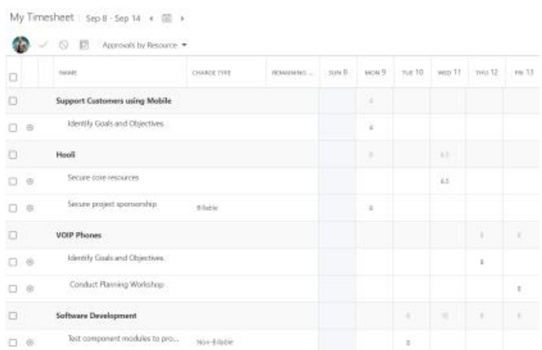






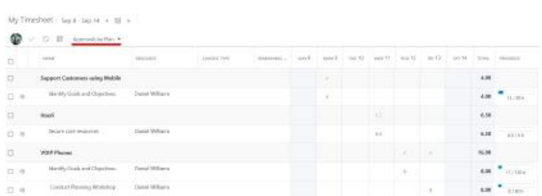
Approvals by Resource View

In the Approvals by Resource view, you will see any time submitted for users whom you are the Timesheet Manager. Only pending approvals show.



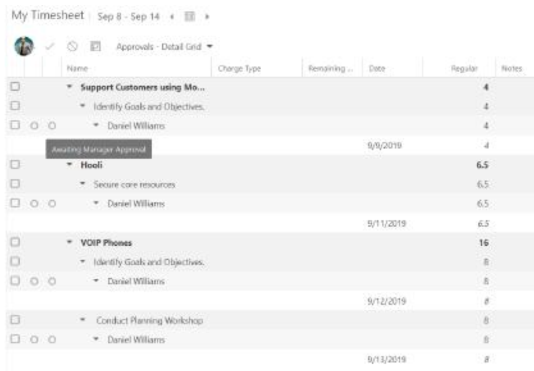
Approvals by Plan View

In the Approvals by Plan, you will see any plans for which you are a Plan Owner. Only pending approvals show.



Approvals - Detail Grid View

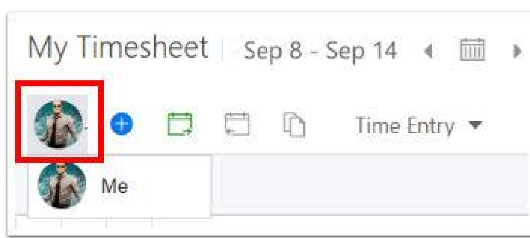
The Approvals - Detail Grid view shows items pending approval, and includes a column for the manager approval and the planner approval.



Timesheet Delegates

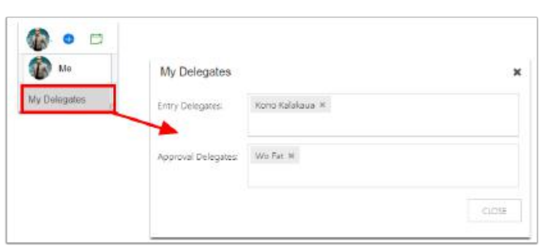
Act as Delegate

If you are a delegate for another user, you may view and edit their timesheet on their behalf. The user profile photo shows for whose timesheet you see. Click on the photo to see a list of your delegated users and select another user's timesheet, if able and needed.



Assign Delegates

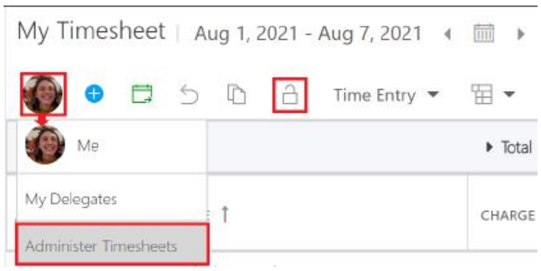
If enabled, you may be able to assign your own delegates. Click on your user profile picture. Select My Delegates. Enter any names for Entry Delegates & Approval Delegates (Anything for which you are the approver will be delegated to the approval delegate(s) you assign).



Administer Timesheets

This article explains how to administer timesheets. You must be a Timesheet Administrator to administer timesheets.

If you are set as a Timesheet Administrator in your OnePlan environment, you will have access to additional **Administer Timesheet** and **Unlock** options in your timesheet.



1. Click the user icon in the left-corner, then select **Administer Timesheets**. The **Admininster Timesheets** form will open.

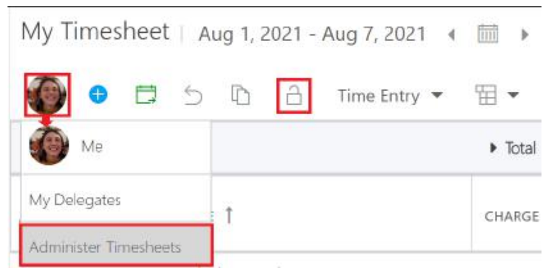
2. Enter the name of the user whose timesheet you would like to access. Available users will appear as typeahead search results. Select the desired user.
3. Click **Administer**.

You will be redirected to the user's timesheet. As a Timesheet Administrator, you have full access to edit the user's timesheet as needed for accurate reporting.

Unlock Timesheet Rows

This article explains how to unlock timesheet rows after they have been locked. You must be a Timesheet Administrator to unlock timesheet rows.

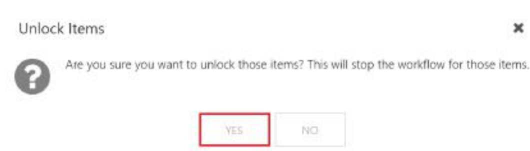
If you are set as a Timesheet Administrator in your OnePlan environment, you will have access to additional **Administer Timesheet** and **Unlock** options in your timesheet.



1. Go to the desired timesheet. See Administer Timesheets for instructions on accessing another users timesheet.

2. Select the timesheet rows you would like to unlock. Then click **Unlock**.

3. Click **Yes** in the pop-up to confirm that you would like to unlock the selected rows.



The timesheet rows are now unlocked and editable.


My Timesheet
40.00
Assign development staff
Conduct needs analysis

My Work

My Work overview

This article provides a brief overview of My Work. The My Work feature is designed for Team Members to view and update all work assignments on a single page. The Plan Owner will see the updated values when they look at the plan schedule and elsewhere (reports, etc.).

My Work allows users to manage work in a List, a Board, and in a personal Resource Plan. From these views, users can group, filter and sort their work items, view work in a gantt chart, save custom view configurations, add activities to work items, add new work items, update work items, and enter time off.

NOTE

The work items that appear in My Work are based on the tasks date. My Work only shows work items with dates from past or the next 30 days.

NOTE

If you are assigned to any activities from the work plan, the parent task will show in My Work.

Access My Work

Click the **My Work** icon in the main navigation menu to access My Work. The List view will open by default.

Manage work in the List, Board, or Resource Plan

The List is the main way to manage your work items in My Work. See Manage My Work in lists [52] to manage work in the list.

Users can also manage work in a kan ban board view. Click **Board**. For more information on managing work in the board view, see Manage My Work in boards [55].

Users can also view personal resource plan in My Work to see which plans you should be working on and if you are over or under allocated. Click **Resource Plan** to view your personal resource plan. See View your personal resource plan in My Work [56] for more information.

Typical actions in My Work

The following are typical actions a Team Member will take when using My Work.

For more information on how to use all of the components of My Work, see Manage My Work in lists [52], Manage My Work in boards [55], and View your personal resource plan in My Work [56].

Group, filter, sort, and arrange work items

To narrow and organize the work items in My Work, use the group, filter, sort, and column functions.

Modify views

Make any changes to the view, such as adding columns, arranging columns, etc.

Add or remove columns

Right-click a column header

To add or remove a column:

1. Right-click in any column header. Expand the Columns sub-heading.

   NOTE

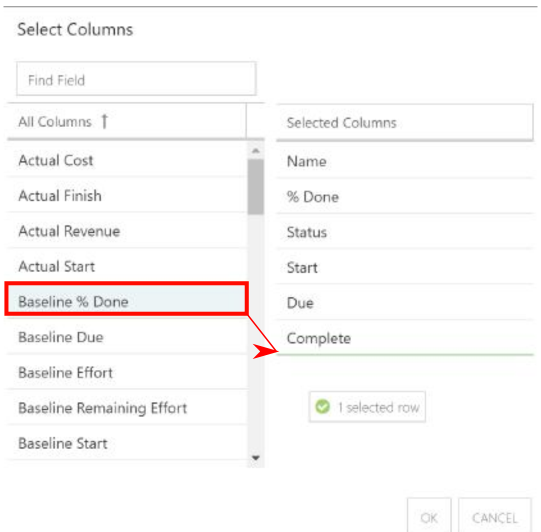
   The columns already in the view marked with a check. The remaining available fields are listed.

2. Select or deselect the columns to show or hide in the view. Newly added columns show on the far right.

Select Columns button

To add or remove columns:

1. Click **Select Columns**. The **Select Columns** form will open.
2. To add columns to the view, drag and drop desired columns from the **All Columns** column into the **Selected Columns** column.
3. To remove a column, drag and drop the desired column from the **Selected Columns** column into the **All Columns** column.



Arrange column order

To arrange the columns, click on the column heading and drag the column to the desired location. Let go of the mouse to drop the column in that spot.

Sort columns

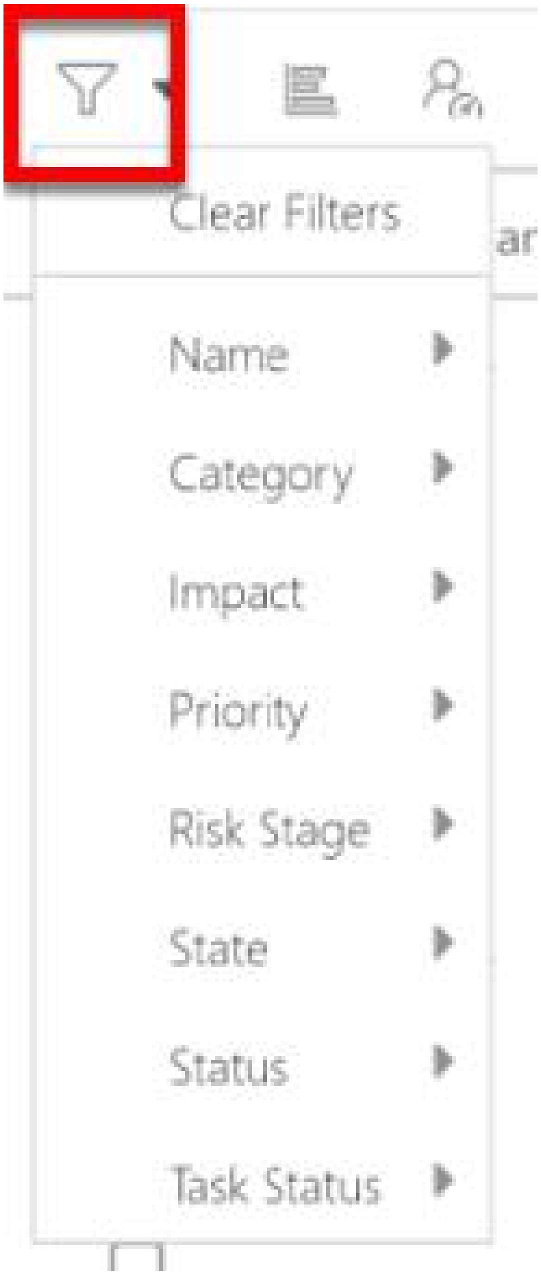
Click on the column header so sort the column in ascending or descending order.

Group work items

Select a grouping category from the **Group By** drop down to group the work items.

Filter work items

Click the Filter icon to sort the Work Items by a field.



Mark a work item "complete"

Select the check box to mark an item as complete. **Status** will update to Completed and **% Done** will update to 100%.

Once you have updated the task and the Project Manager has accepted the changes there will be an approval status indicator. This makes it easy to see if the status updates have been approved.

Update work item information

Click into and update any field in line that's editable, such as **% Done**, **Status**, etc.

> **NOTE**
> Some fields are auto-updated based on the values of others, such as the **Status** and **% Done**. If you update the **Status** from **Not Started** to **In Progress**, the **% Done** goes from 0% to 50%, and vice versa.

Enter a time off request

Click **Time Off** to enter a time off request. See Enter a time off request [48]for more information on entering a time off request.

Enter a time off request

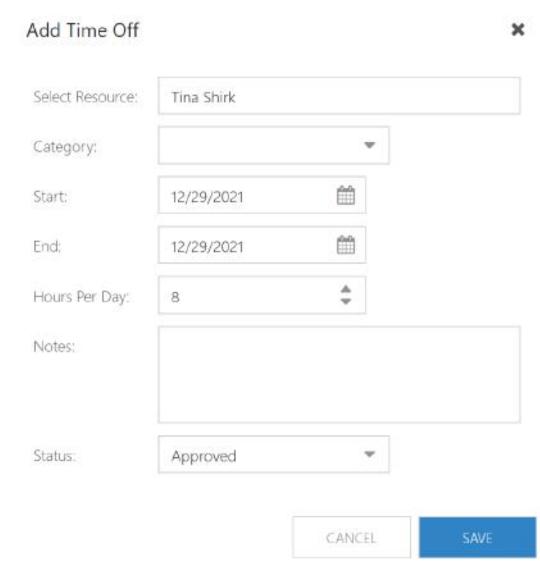
This article explains how to enter a time off request. Time off in OnePlan will update the resource pool to allow for accurate scheduling.

If you are an approver, see Time off request notifications and approvals.

1. Go to My Work.
2. Click **Time Off**. The **Time Off** window will open.

3. Click **Add Time Off**. The **Add Time Off** form will open.

4. Complete the **Add Time Off** form.
   - **Select Resource**: Only editable for Owners and Managers. Search for and select the resource to create a time off request for. For Team Members, this field will be auto-filled with your name.
   - **Category**: Select the time off category. These categories are configured by your OnePlan administrator.
   - **Start**: Select the time off start date.
   - **End**: Select the time off end date.
   - **Hours Per Day**: Select the number of time off hours per day within the set date range.
   - **Notes**: Enter any notes that the approving manager may need.
   - **Status**: Only available for Owners and Managers. Select the status of the time off request upon submission. Options include **Approved**, **Requested**, and **Rejected**.



5. Click **Save**. The time off request is now submitted. In the Time Off window, you will see a list of all of your time off requests and their statuses.

Add a work item in My Work

This article explains how to add work items in My Work.

NOTE
Users need at least a Team Member Plus license to add items from My Work.

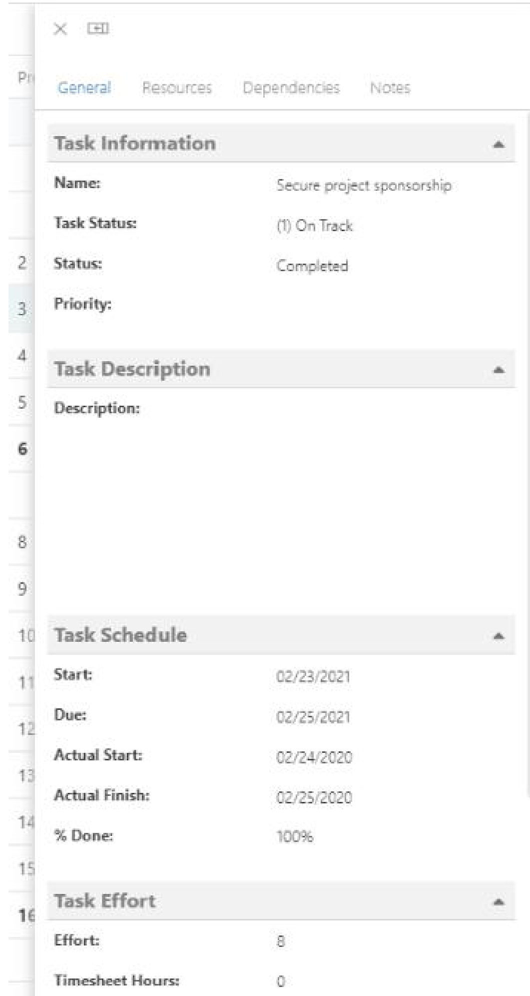
Work items created in My Work will go back into the schedule for the Project Manager. These items will automatically be assigned to you.

The items that can be added are defined by the system administrator. An example of some out of the box items are Tasks, Backlog, Risks, Issues, Changes, and Key Decisions.

To add a work item:

1. Click **New Item** and select the item type from the drop down. The **Add New [Item]** form will open.
2. Complete the **Add New [Item]** form.
   - **Plan**: Select the plan where the new item should be added.
   - **Name**: Enter the name of the new work item.

3. Click **ADD ITEM**. The item information form will open.
4. Complete the item information form with necessary information.



NOTE
The item information form will look different depending on the work type you chose in step 1.

The new work item will appear in your My Work List and Board, and be added to the designated plan.

Create and edit views in My Work

This article explains how to create and edit views in the My Work List view.

Modify views

Make any changes to the view, such as adding columns, arranging columns, etc.

Add or remove columns

Right-click a column header

To add or remove a column:

1. Right-click in any column header. Expand the Columns sub-heading.

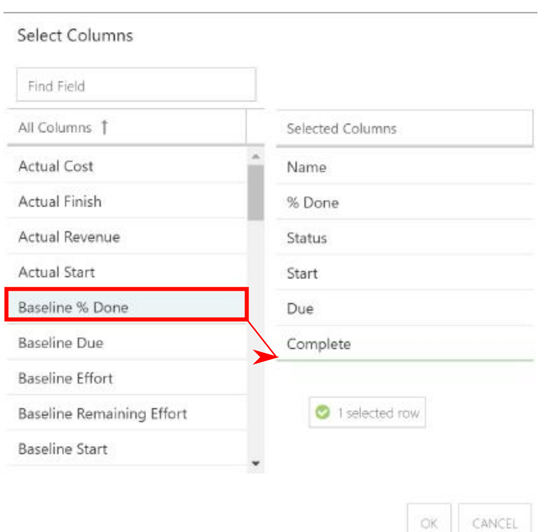
> **NOTE**
> The columns already in the view marked with a check. The remaining available fields are listed.

2. Select or deselect the columns to show or hide in the view. Newly added columns show on the far right.

Select Columns button

To add or remove columns:

1. Click **Select Columns**. The **Select Columns** form will open.
2. To add columns to the view, drag and drop desired columns from the **All Columns** column into the **Selected Columns** column.
3. To remove a column, drag and drop the desired column from the **Selected Columns** column into the **All Columns** column.



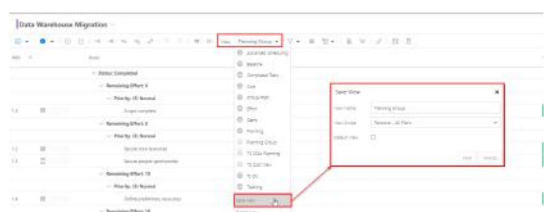
Arrange column order

To arrange the columns, click on the column heading and drag the column to the desired location. Let go of the mouse to drop the column in that spot.

Save a view

Make any changes to the view, such as adding columns, arranging columns, etc.

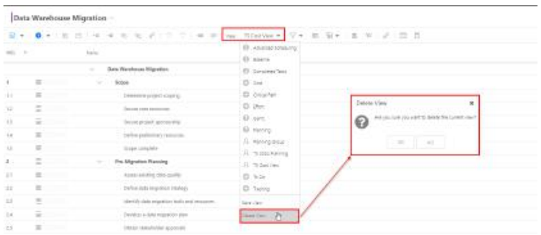
1. On the View menu, select **Save View**. The **Save View** form will open.
2. Complete the **Save View** form.
   a. **View Name:** Initially, the current view name will show. Update to a new name. If updating a view rather than saving a new view, keep the name as-is.
   b. **Default View:** Check the checkbox if this is a default view. A default view will open automatically when you go to the Work Plan.
   c. **Personal View:** Check the checkbox if this is a personal view. It is checked by default. Administrators may save a view as a global view for the group by deselecting the checkbox.



Delete a view

Navigate to the view you want to delete.

1. On the View menu, select Delete View. Deleting a global view deletes it for everyone.
2. Confirm deletion.



Manage My Work in lists

This article explains how to manage My Work work items in the **List** view.

The List is the main way to manage and update assigned work items in My Work. From the List view, users can manage work items, create new work items, add activities to work items, view work in a gantt chart, and enter time off.

See My Work overview [46] for a brief overview of My Work.

Mark a work item "complete"

Select the check box to mark an item as complete. **Status** will update to Completed and **% Done** will update to 100%.

Once you have updated the task and the Project Manager has accepted the changes there will be an approval status indicator. This makes it easy to see if the status updates have been approved.

Update work item information

Click into and update any field in line that's editable, such as **% Done**, **Status**, etc.

> **NOTE**
> Some fields are auto-updated based on the values of others, such as the **Status** and **% Done**. If you update the **Status** from **Not Started** to **In Progress**, the **% Done** goes from 0% to 50%, and vice versa.

Add a new work item

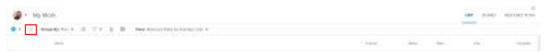
> **NOTE**
> Users need at least a Team Member plus license to add work items from My Work.

Click **Add New Item** to add a new work item to a plan in My Work. Work items created in My Work will automatically be assigned to the user who created them.

See Add a work item in My Work [49] for more information on creating work items in My Work.

Enter time off

See Enter a time off request [48] for instructions and information entering time off.



View and add activities to work items

Select a work item in the List view. Then click **Activities** to view the activities for that work item. There is an activities button in the header, or next to the work item title.

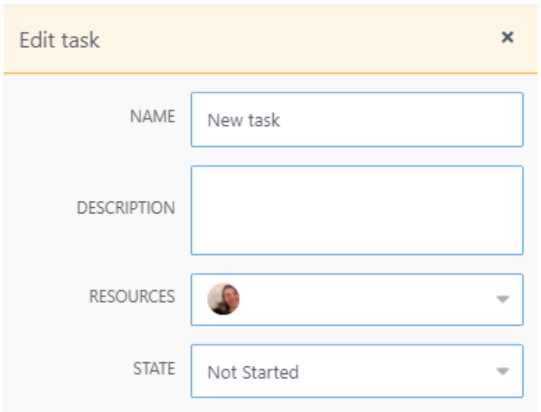
Add a new activity

There are two ways to quickly add a new activity for a task:

- **Using** the **Add Activity** field.
    1. Enter the name of the new activity in the field.
    2. Press **Enter**. The new activity will be added to the farthest left column of the activities board (typically "Not Started").
- Using the **Add Task** button.
    - Click the **Add Task** button in the desired column. The new activity will be added to the bottom of the column.

Newly added activities are blank. To add information to the activities:

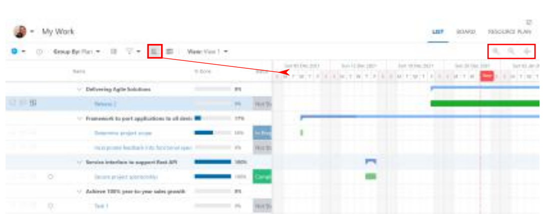
1. Double click the activity. The **Edit task** form will open.



2. Update the **Edit task** form.
   - **Name:** Enter the name of the activity.
   - **Description:** Enter a description of the activity.
   - **Resources:** Search for and select users to assign the activity.
   - **State:** Select the state the activity is in.
3. Press **Enter** to apply the changes.

Show gantt

The gantt view allows team members to better visualize the timeline of when work needs to be completed. The buttons to the right of the gantt allow for zooming in and zooming out along with Zoom to Fit.



Group, filter, sort, and arrange work items

To narrow and organize the work items in My Work, use the group, filter, sort, and column functions.

Modify views

Make any changes to the view, such as adding columns, arranging columns, etc.

Add or remove columns

Right-click a column header

To add or remove a column:

1. Right-click in any column header. Expand the Columns sub-heading.

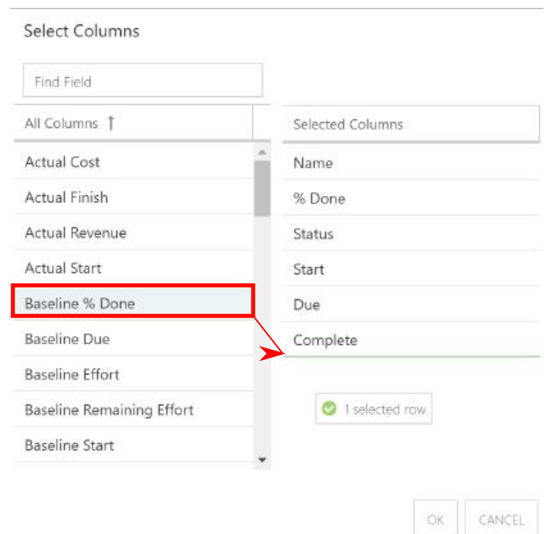
> **NOTE**
> The columns already in the view marked with a check. The remaining available fields are listed.

2. Select or deselect the columns to show or hide in the view. Newly added columns show on the far right.

Select Columns button

To add or remove columns:

1. Click **Select Columns**. The **Select Columns** form will open.
2. To add columns to the view, drag and drop desired columns from the **All Columns** column into the **Selected Columns** column.
3. To remove a column, drag and drop the desired column from the **Selected Columns** column into the **All Columns** column.



Arrange column order

To arrange the columns, click on the column heading and drag the column to the desired location. Let go of the mouse to drop the column in that spot.

Sort columns

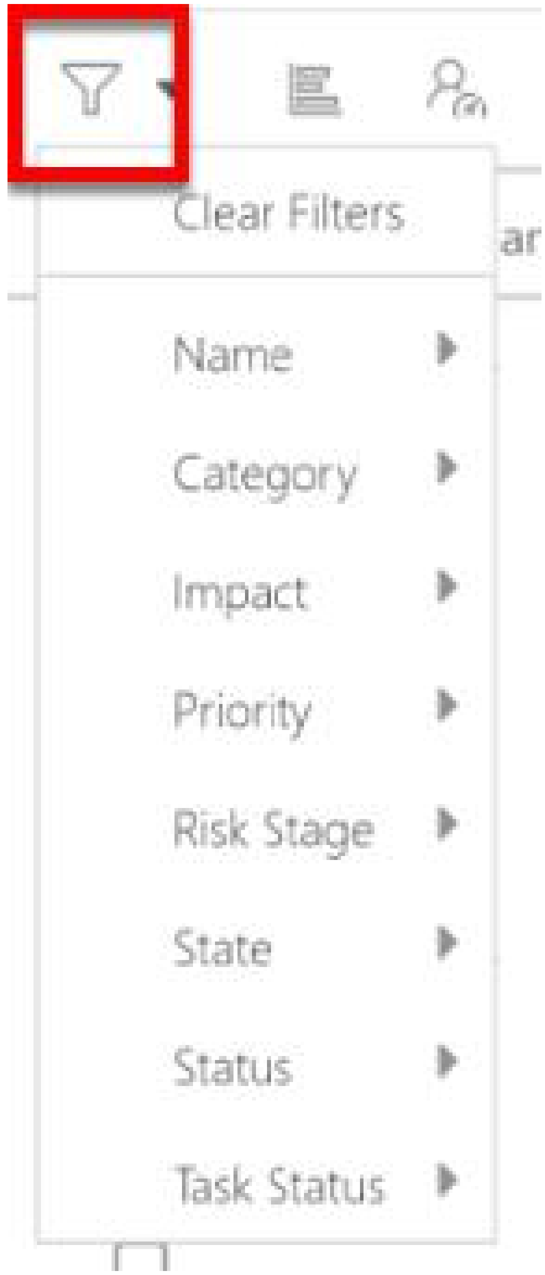
Click on the column header so sort the column in ascending or descending order.

Group work items

Select a grouping category from the **Group By** drop down to group the work items.

Filter work items

Click the Filter icon to sort the Work Items by a field.



Use, create, and manage views

Click **Views** to open the drop down. You can select a saved view, or create and save your own personal view. See Create and edit views in My Work [50] for more information on views.

Manage My Work in boards

This article explains how to manage work items in the My Work Board.

The Board presents assigned work items in a Kanban board view.

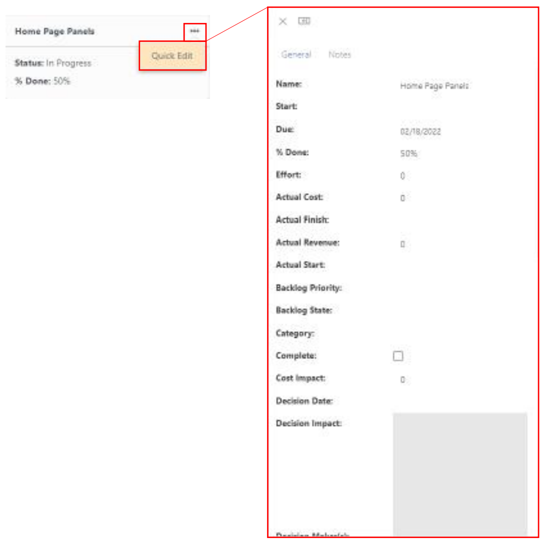
Move items in the board

To move items in the board, drag and drop the desired card into the desired location. This will update the status of the item in the plan.

Edit work item information

To edit work item information:

1. On the desired work item card select the ellipses > **Quick Edit**. The quick edit form will open.
2. Update the item information as required. The changes will auto-save.

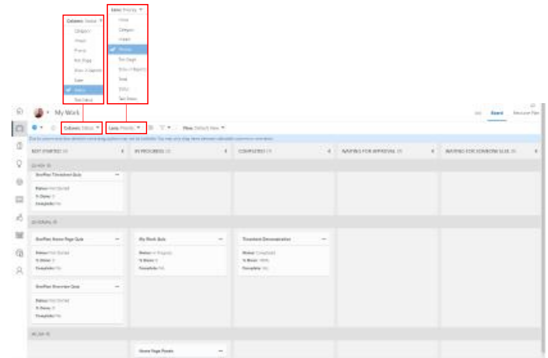


Modify the Board View

Configure the board Columns and Lanes

Select the fields from the **Column** and **Lane** menus to create the columns and lanes in the board.

> **NOTE**
> Due to column and lane selection some drag options may not be available. You may only drag items between statusable columns or lanes.



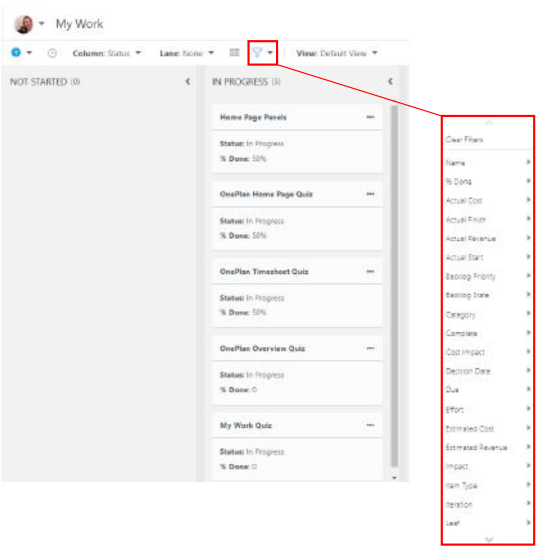
Filter work items

Filter the work items that appear in the board view. To apply filters:

1. Click **Filter** .
2. Select and set the desired filter(s). A check mark appears next to selected filters.

> **NOTE**
> The **Filter** icon is blue when filters are applied.

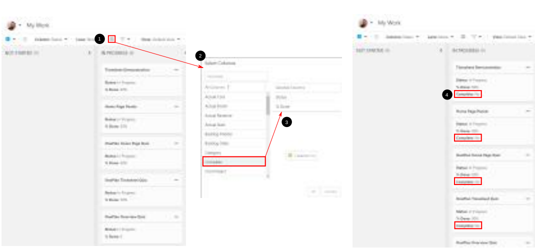
3. To remove filters:
   - Uncheck selected filters to clear individual filters.
   - Click **Clear Filters** to clear all filters.



Configure work item card information

Select the information that appears on the work item cards.

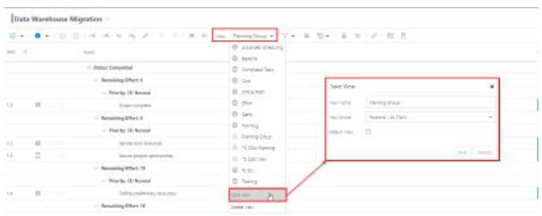
1. Click **Select Columns** . The **Select Columns** form will open.
2. To add a column to the work item cards, drag the desired column from **All Columns** to **Selected Columns**.
   To remove a column from the work item card, drag the column from **Selected Columns** to **All Columns**.
3. Click **OK** to update the work item cards.



Save a view

Make any changes to the view, such as adding columns, arranging columns, etc.

1. On the View menu, select **Save View**. The **Save View** form will open.
2. Complete the **Save View** form.
   a. **View Name:** Initially, the current view name will show. Update to a new name. If updating a view rather than saving a new view, keep the name as-is.
   b. **Default View:** Check the checkbox if this is a default view. A default view will open automatically when you go to the Work Plan.
   c. **Personal View:** Check the checkbox if this is a personal view. It is checked by default. Administrators may save a view as a global view for the group by deselecting the checkbox.



View your personal resource plan in My Work

This article explains how to view your personal resource plan in My Work.

The personal resource plan allows users to see which plans they should be working on and if they are over or under allocated.

Access your personal resource

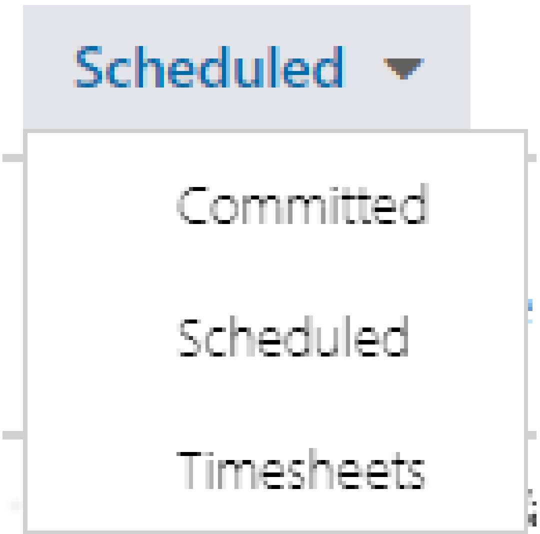
1. Go to My Work.
2. Click **Resource Plan**. Your resource plan will open.

Use your personal resource plan

Select the cost type

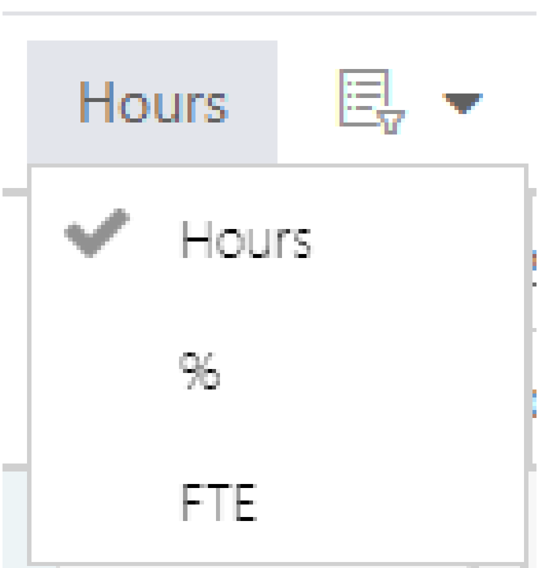
Select which cost type you would like to review in your resource plan, such as Scheduled or Committed.

> **NOTE**
> Cost types are configured by your OnePlan administrator and will vary.



Select the planning mode

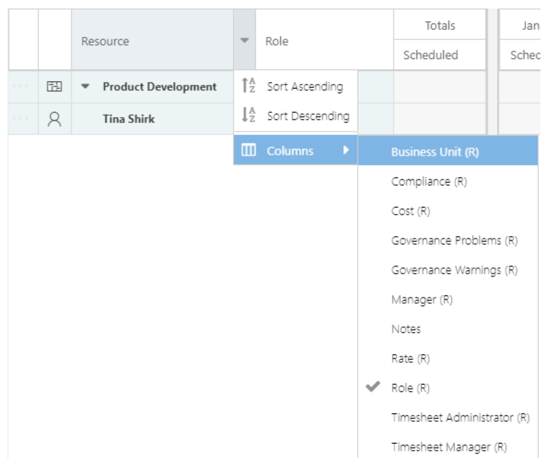
Select the planning mode you would like to review your resource plan in. Options include **Hours**, **% (percent)**, and **FTE (full time equivalent)**.



Add or remove columns

You can add or remove columns in the left pane of the resource plan.

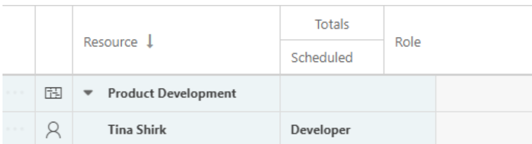
1. Click the arrow next to a column header to open the column menu.
2. Go to **Columns**, and select or deselect the desired column(s).
   Columns in the view have a check mark next to them.
   Click on selected columns again to remove them from the view.



Move columns

To move a column, drag and drop the desired column header into a new location.

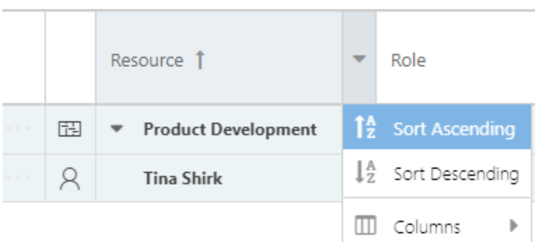
> **NOTE**
> You can only move columns in the left pane of the resource plan.



Sort columns

Click on a column header to sort. You can toggle between ascending and descending order.

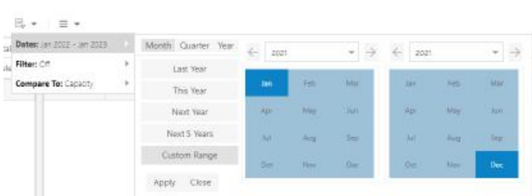
You can also click the arrow next to a column header to open the column menu, then select **Sort Ascending** or **Sort Descending**.



Set the date range

To set the date range you would like to view in the resource plan:

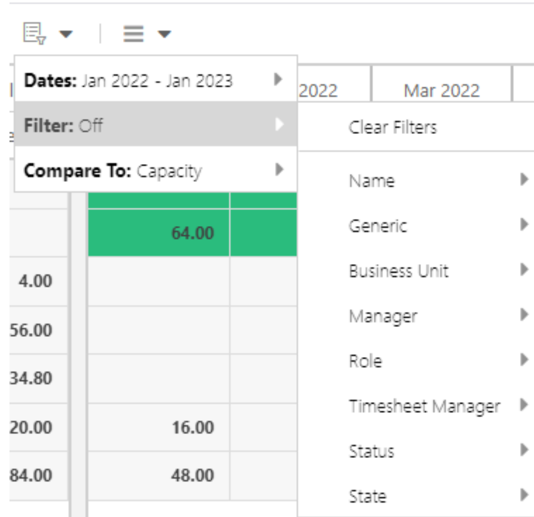
Go to the filters icon > **Dates**, then set the date range using the dates form. You can select a date range preset, or set a custom range.



Apply filters

Go to the filters icon > **Filter**, then select the desired filter(s) from the menu.

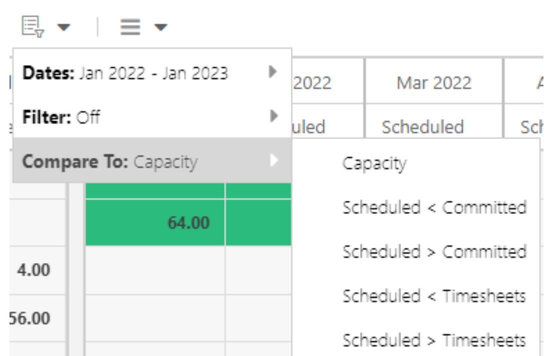
Click **Clear Filters** to remove all filters in the view.



Compare To

Select the method to compare your resource usage against.

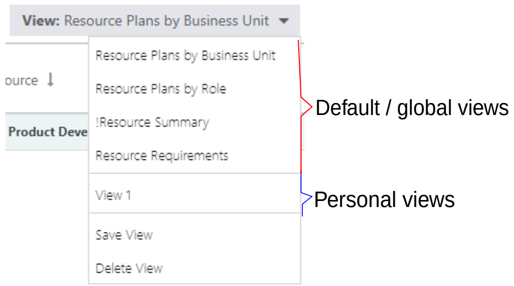
Go to the filters icon > **Compare To**, then select the desired comparison from the menu.



Select, save, and delete views

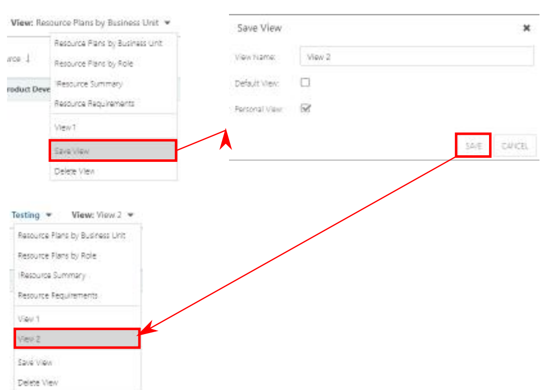
To apply a previously saved view, go to the **Views** menu, then select the desired view.

- Default / global views are on the top of the views list. These views can be created by administrators and are available to all users in the OnePlan group.
- Personal views are below the global views. All users can create personal views, and they are only available to the user who created them.



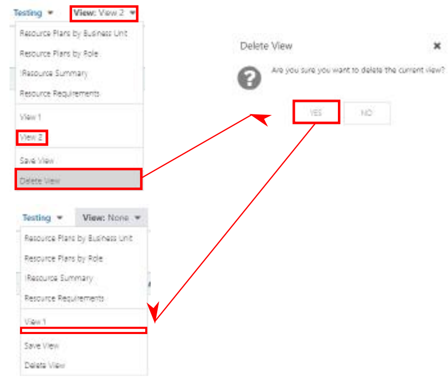
To save a new view:

1. Go to the **Views** menu > **Save View**. The Save View form will open.
2. Complete the **Save View** form.
   - **View Name:** Enter the name of the new view.
   - **Default View:** Check the check box if the new view is a default / global view.
   - **Personal View:** Check the check box if the new view is a personal view.
3. Click **Save**. The new view will appear in the **Views** menu.



To delete a view:

1. Go to the **Views** menu > **Delete View**. The **Delete View** warning will open.
2. Click **Yes** to delete the currently applied view. The view will be removed from the Views menu.



View team work as a resource manager in My Work

This article explains how to view your team's My Work areas as a resource manager.

> **NOTE**
> You must be set as a "Resource Manager" in your OnePlan group to view your team's My Work areas. See How do I set Resource Managers?.

As a "Resource Manager", you can access the My Work area of the users who you manage. This includes the List, Board, and Resource Plan views within the other user's My Work.

To access your team's work:

1. Go to My Work.
2. Click on the user icon in the top left corner. This will open a drop down that displays the users you manage.
3. Select the desired user. The user's My Work data will be displayed.

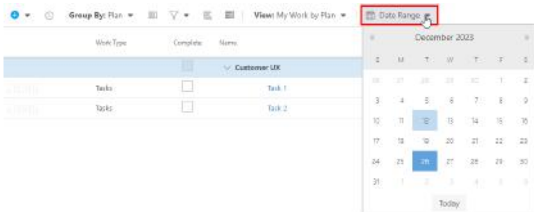
> **NOTE**
> Note the user icon image changes to the selected user's avatar.

Select the Date Period in My Work

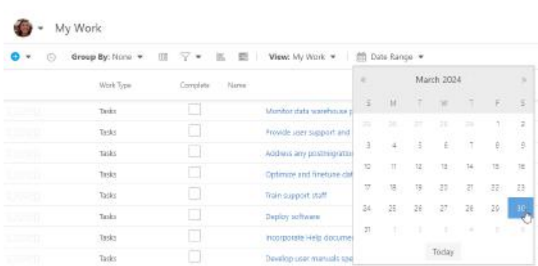
This article explains how to set the date period of work displayed in My Work.

You can choose the date period of work you want to see (up to 180 days in the future). To set the date period:

1. Click the **Date Period** menu in the My Work heater.



2. Using the calendar interface, select a date you would like to see work items in the future. Think of this as selecting the end date to a date range. The date range begins with your oldest overdue task and will end with the date you select in the future.



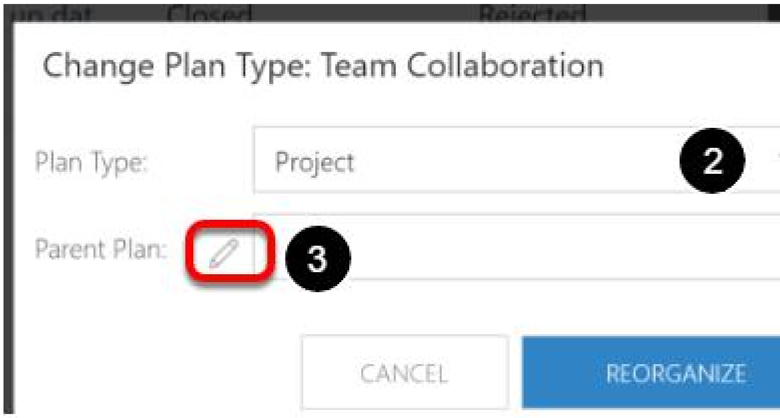
In this example, I selected March 30, 2024, as the end date for the date range of work items displayed in my work. You can see that there are work items listed in my work with due dates between

My Ideas

Add and approve Ideas

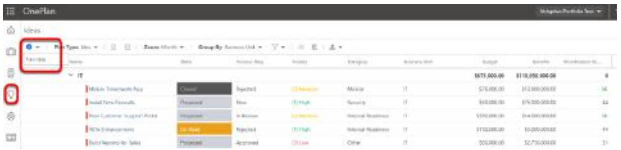
This article explains how to use Ideas or sometimes call project intake. An Idea will usually come from an internal resource. This keeps all ideas in one location for approval of possible upcoming projects. We will go through entering an idea, walk through the process of approving the idea and then creating the project.

This process is optional depending on your organization



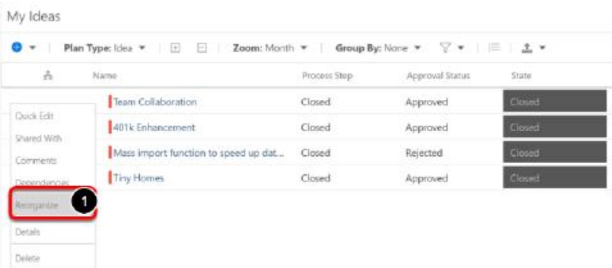
Add an Idea

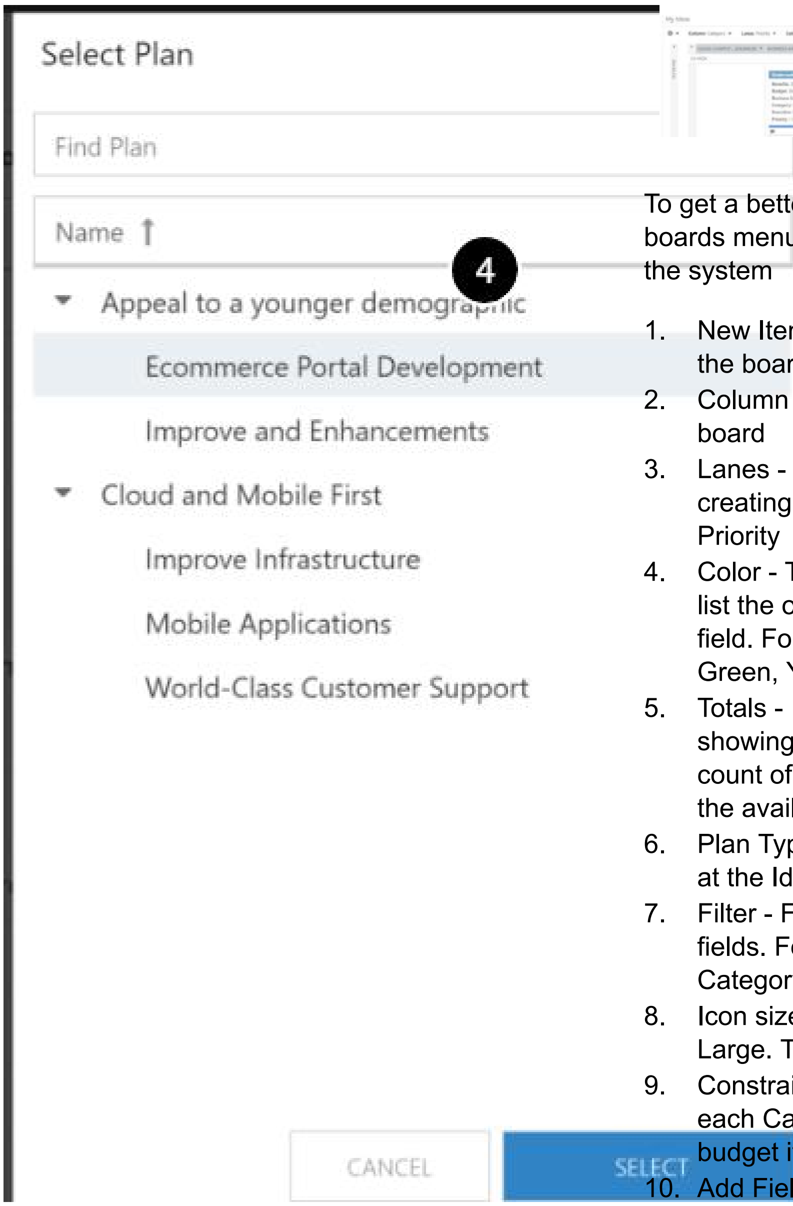
In this example we are going to navigate to the light bulb and click the New button to add a new project idea or request.



Creating a Project from an Idea

One the approval has been completed a project can be created. On the view with the hover over the item and click on the menu. Select Reorganize and change the Plan Type to Project. Then click the pencil next to the Parent Plan to select the Portfolio and Program to associate the project with and click Select and Reorganize.

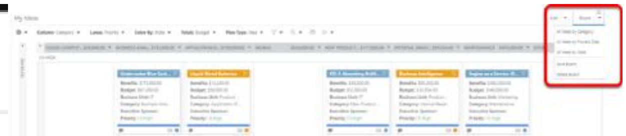




This will ask one last time to change the plan type, select Yes. The Idea is now a project to be worked on.

Idea Board Views

The Ideas Board page shows each item in column swim lanes. You can change your groups and choose to include/exclude additional fields on the plan cards.



To get a better understanding lets go through the boards menu. This will be the same for all boards in the system

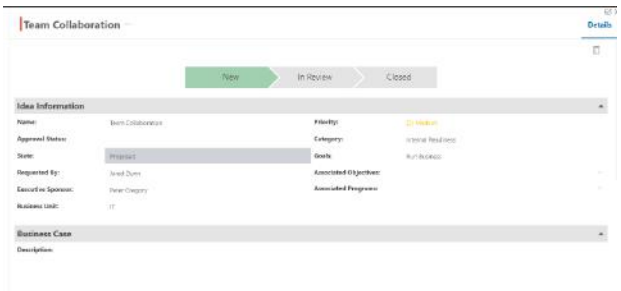
1. New Item - items can be added directly from the board
2. Column - This is the columns shown on the board
3. Lanes - Additional grouping can be done by creating swim lanes. This one is done by Priority
4. Color - This is the color of the cards. In this list the only color coding is done by the State field. For example this could show if an item is Green, Yellow, Red
5. Totals - In the column header this example is showing with the Budget. This can just be a count of card, click on the dropdown to see all the available fields
6. Plan Type - This is showing us we are looking at the Idea Plan Type
7. Filter - Filtering can be done on many different fields. For example I only want to see the Category that equals Security
8. Icon size - The options are Small, Medium, Large. The current board is on the Large cards
9. Constraints - Budget Constraints can be set for each Category. For Example I only want to see budget items higher than $100,000 dollars
10. Add Fields - This allows to add/remove fields from the cards

After any changes are made to a view make sure to click Save on the dropdown on the Board menu. You can overwrite the current view or save as a new view.

Idea Details

Complete the plan details. Your form may have different fields based on your organization's use case & configuration. The page is editable and you may always return to the Details page through the life cycle of the Idea. The Approval Status field is used by the Approver.

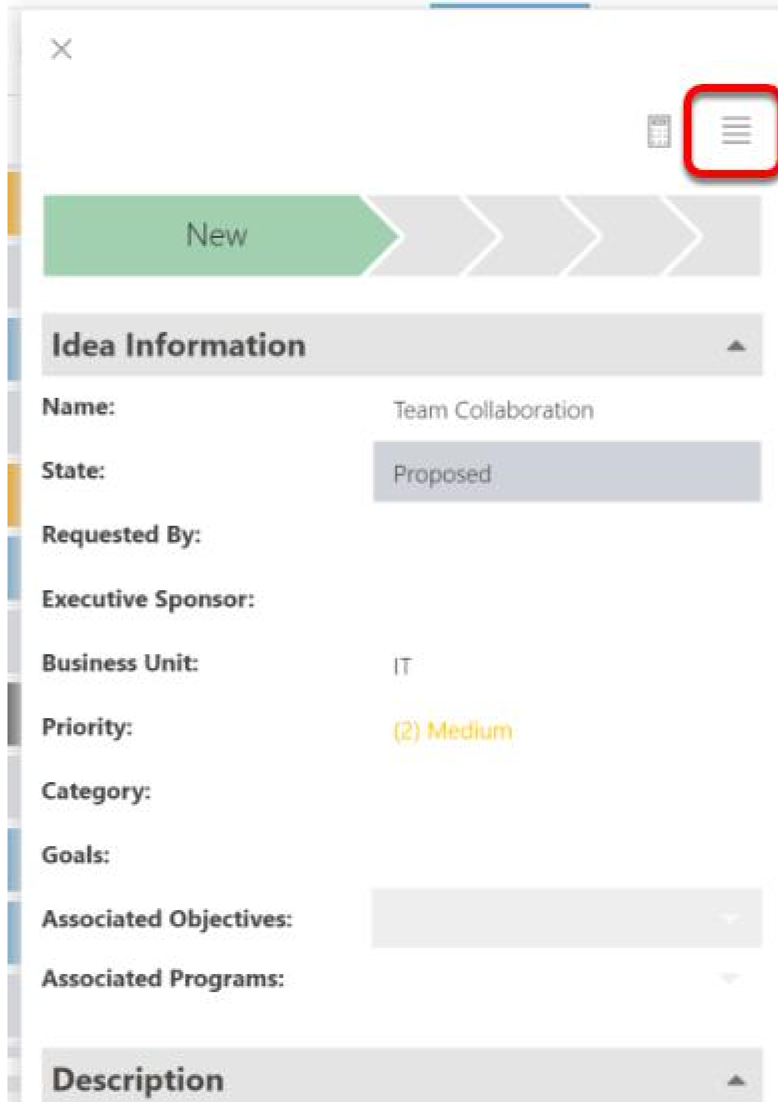
When you make an update or change, the page will save automatically.



Idea Name

Enter the name of your project idea of **Team Collaboration** and click Add Plan .

Click on the Go To Menu and select Details



Move Idea to the Next Stage

Once all the information has been completed in the Idea, update the Stage to In Review.

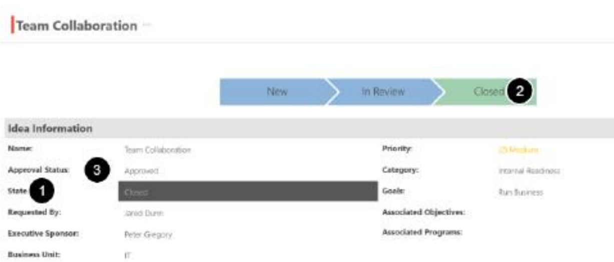
Click on the stage name to visually see the current stage. The tab color changes to green on the current stage. Future stages are gray. Previous stages are blue.

Click on New and click next to move to In Review.

Review Submitted Ideas

Depending on your organization this may be a committee meeting where a panel reviews the new Ideas and will put in priority order, or a single person who reviews the requests. The project can be selected based on the Prioritization score or the organizational need.

As they go through and approve, reject or put on hold they will update the State to Closed, Stage to Closed and Approval Status to the final decision. If approved it is time to create a project.



Manage Requests in the Ideas area

This article explains how to manage and prioritize your user requests using the **Ideas** area.

This article assumes that your admin has configured the Requests app to create new ideas when requests are created and submitted. This will place requests in the Ideas area for managers to use the more advanced prioritization and management features to analyze the requests/ ideas.

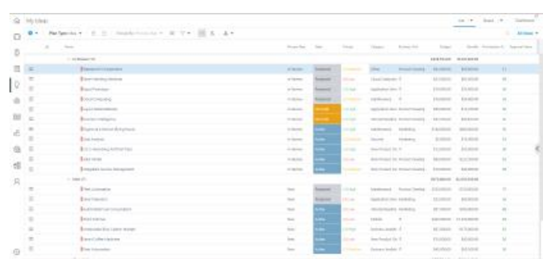
The Ideas area's management and prioritization features mimic the features of the Work Planner, and many other areas of OnePlan.

Header Menus and Icons

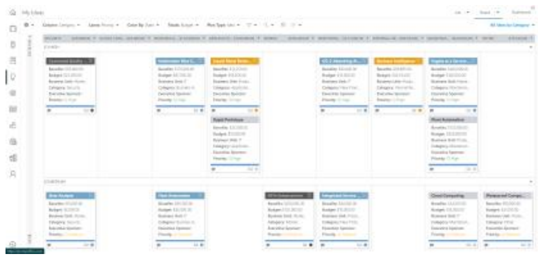
- **Add New**: Click to create a new idea. See Add and approve Ideas [61] for more information.
- **Plan Type Menu**: Select a plan type to view in the list. Your configuration may have multiple plan types in the Ideas area.
- **Expand / Collapse**: Click the plus to expand all of the ideas in the list. Click the minus to collapse all of the ideas in the list.
- **Group By**: Select a plan-level field to group your ideas by in the list. A common example would be to group your ideas by their Process Step (i.e. In Review, New, Closed).
- **Filters**: Select filter(s) from the Filters menu to refine the ideas in your list.
- **Prioritize**: Click to turn on prioritization for the ideas in your list. This will number the ideas beginning with 1 at the top, being the highest priority. Drag and drop the ideas in the list to re-prioritize.
- **Gantt**: Click to open the Gantt chart for the ideas in your list.
- **Export**: Click to export the ideas list to an Excel file.
- **Refresh**: Click to refresh the data in the ideas list.
- **Views Menu**: Select a preconfigured view from the menu. You can also save and delete views from this menu.

List, Board, and Dashboard

By default, the Ideas area will display ideas in the list view.



You can also view your ideas in a board view by clicking **Board** in the upper right corner of the screen.



You can also view any configured PowerBI reporting dashboards by clicking Dashboard in the upper right corner of the screen.

Convert a Request into a Plan

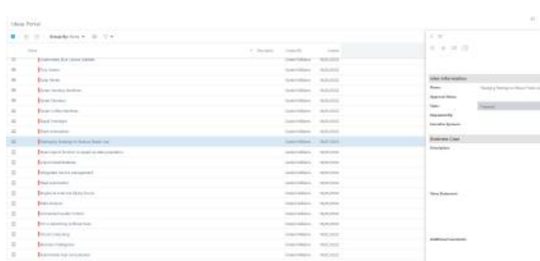
This article explains how to convert a request in the **Ideas** area into a plan.

You administrator will need to set up the plan conversion logic before you can proceed.

Manually Convert Requests into Plans

If your environment is set up so you can manually convert requests into plans, you can do so by:

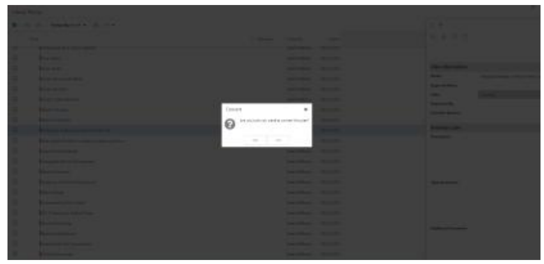
1. Select your desired request. The request details form will open.



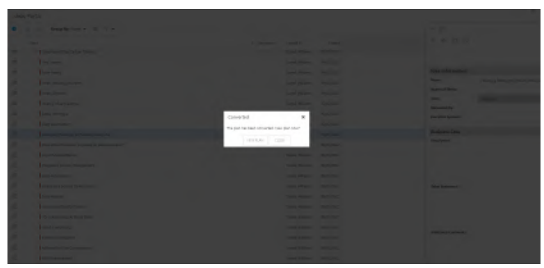
2. Click **Convert** to convert the selected request into the set plan type.

> **NOTE**
> Which plan type the request converts into is set by your administrator.

3. Click **Yes** to confirm the conversion. The request will be converted into a plan.



4. Click **View Plan** to view the newly converted plan. Otherwise, click **Close**.



Automatically Convert Requests into Plans

Your environment my be set up to automatically convert requests into plans given set triggers (e.g. entering a certain process step or status). This logic is set up by your administrator. Please consult with your administrator about how the automation works for your particular environment.

Innovation

Submit an Idea with the Innovation App

This article explains how Requestors can create and submit new Ideas using the Innovation App.

IMPORTANT

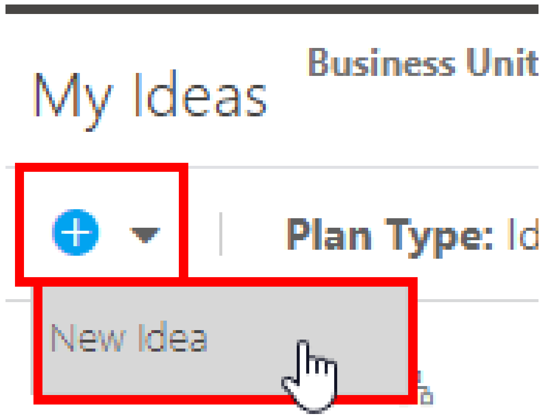
This article assumes you are a user with a limited Requestor license. The process for creating new items in the Innovation App is the same for all users, however, some users may have more controls on the page based on their permissions. The Requestor license and permissions are the most limited and will be reflected in the images in this article.

Access the Innovation App Area

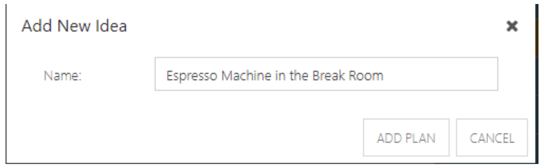
As a Requestor, you only have access to areas in OnePlan where the Innovation App is enabled. In this example, I have access to the My Ideas area as it is the only one with the Innovation App enabled.

Create a New Idea

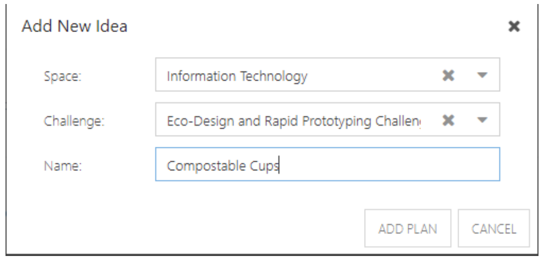
1. Click the New Item icon in the header, then select the item type you would like to create. In this example, I can only create new Ideas.



The **Add New Idea** form will open. This form will look a little different depending on how your organization has the area configured. If the area has a flat hierarchy, the form will look like this, where you simply give your new Idea a name.



If the area has a hierarchy, the form will look like this, where you need to select the parents of your new Idea. This helps you properly organize your new Idea based on your organization's plan hierarchy structure.



2. If required, select the proper parents for your new Idea. Then give your new Idea a name. Click **Add Plan** to create your new Idea. This new Idea will now be available in the Innovation App area for others to vote and

comment on. Be sure to add details about your new Idea using the Quick Edit form.

Update Idea Details

To update details for a given item in the Innovation App area, click the contextual (hamburger) menu next to the desired item. Then select **Quick Edit**. The **Quick Edit** form for the selected item will open on the right side of the screen. Update the item's details as needed. Changes will auto-save.

If you are updating the details for multiple items in the Innovation App area, leave the Quick Edit form open and select the next item in the list. The Quick Edit form will update for the selected item.

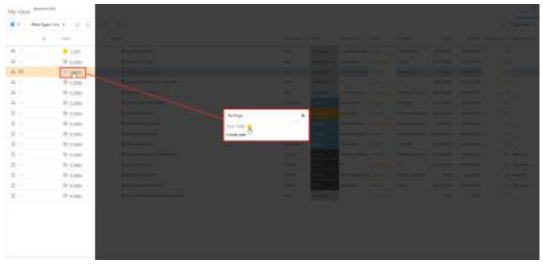
Vote on Ideas with the Innovation App

This article explains how to vote on items in the Innovation App area. All users can review, vote on, and comment on items in the Innovation App area.

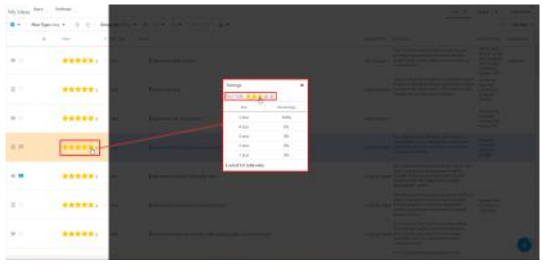
Vote on Ideas

Voting on Ideas in the Innovation App area is simple.

If your organization uses single voting, click on the star icon next to the Idea you would like to vote for. This will open the **Ratings** form. Click on the **Your Vote** icon to cast your vote. Click on the **X** in the top right corner to exit the form and return to the Ideas list.



If your organization uses star voting, you can rate Ideas on a 1 to 5 star scale. Click on the star icons next to the Idea you would like to rate. This will open the **Ratings** form. Click on the **Your Vote** icons to rate the Idea from 1 to 5 stars. Click on the **X** in the top right corner to exit the form and return to the Ideas list.



Review Voting Results on Ideas

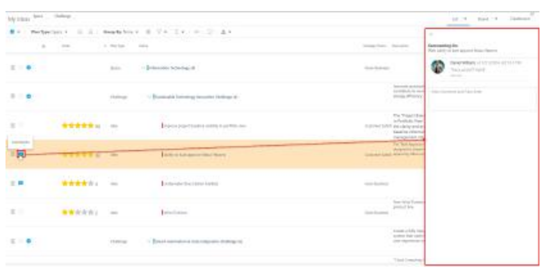
To review the voting results of items in the Innovation App, click on the score or vote total next to the desired item. The Ratings form will open.

If the area is using star voting, all users can rate items from 1 to 5. The results will show a breakdown of the ratings, as well as the average rating for all votes.

If the area is using single votes, all users will be able to vote on items that they like. The results will show the total count of votes on that item.

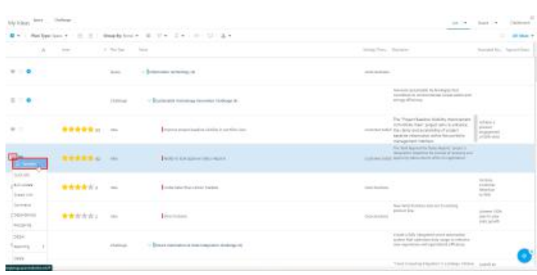
Make and Review Comments on Ideas

To make and review comments on items in the Innovation App, click on the **Comments** icon next to the desired item. The Comments panel will open on the right side of the screen. Items with existing comments have the icon highlighted in blue.



Favorite an Idea

To add an item to your Favorites list on your Homepage, click the contextual (hamburger) menu for the desired item, then select **Favorite**. The selected item will now be available for quick access in the Favorites tab of the Plans Panel on your Homepage.



Manage Ideas with the Innovation App

Once your Innovation App area has several Ideas created and voted on, you will want to review the items and take action on them.

The plan management capabilities in the Innovation App area are identical to those in the Portfolio Area.

NOTE

You can apply the Innovation on any Plan Type in OnePlan. For this article, we will use an example of the Innovation App applied to the Ideas Plan Type.

IMPORTANT

This article assumes that you have Plan Creation permissions beyond the Requestor permission level (such as Manager permissions).

Create Hierarchies in the Innovation App

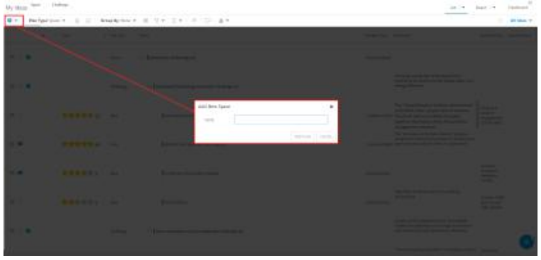
The major difference between the Innovation App and its predecessor, the Requests App, is that you can create hierarchies with the Innovation App. This means that you can organize your Innovation space in any way that makes sense for your organization. Requestors are limited to creating and voting on the Plan Type set to "Open to All Users" in the back end. This will likely be the lowest-level Plan Type. See Configure the Innovation App for more information.

In this example, all users can create and vote on Ideas, but only Managers can create Spaces and Challenges.

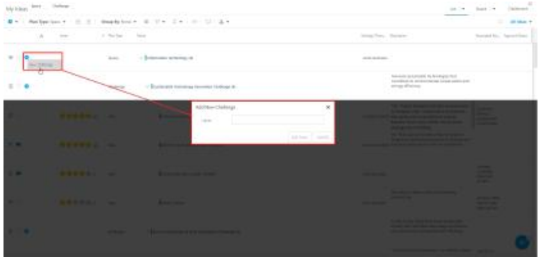
To create these parent plans as a user with proper plan creation permissions:

1. Click the **New Item** icon in the header to create a new top-level item in the hierarchy. The **New**

[Item Type] form will open. Give the new top-level item a name, then click **Add Plan**.



2. Click the **New Item** icon in the list view to create a child item in the hierarchy. The **New [Item Type]** form will open. Give the new child item a name, then click **Add Plan**.

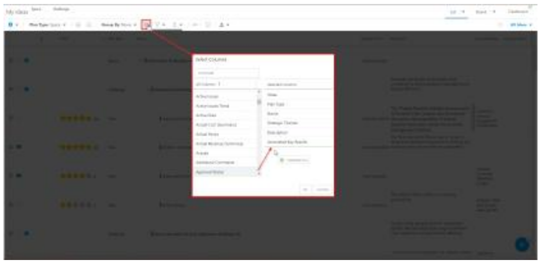


Now when other users create new Ideas, they have a hierarchy to organize their Ideas into.

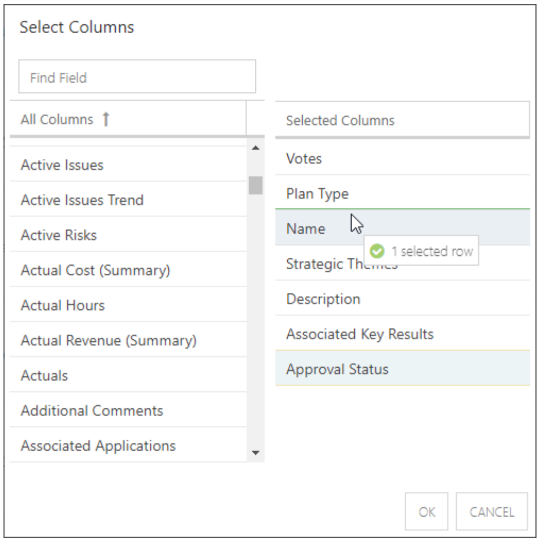
Configure and Save Views in the Innovation App

As a Manager, it is your responsibility to create views for other users to leverage when using the Innovation App area. To create views:

1. Add your desired columns into the view and arrange them in a way that makes sense to you and your organization. Click on the **Select Columns** icon in the header. Drag desired columns from the **All Columns** list into the **Selected Columns** list to add the column to your view.

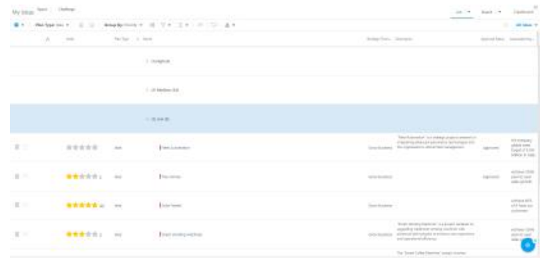


You can rearrange the columns from left (columns at the top of the list) to right (columns at the bottom of the list). When you are happy with your columns and their order, click **OK**.

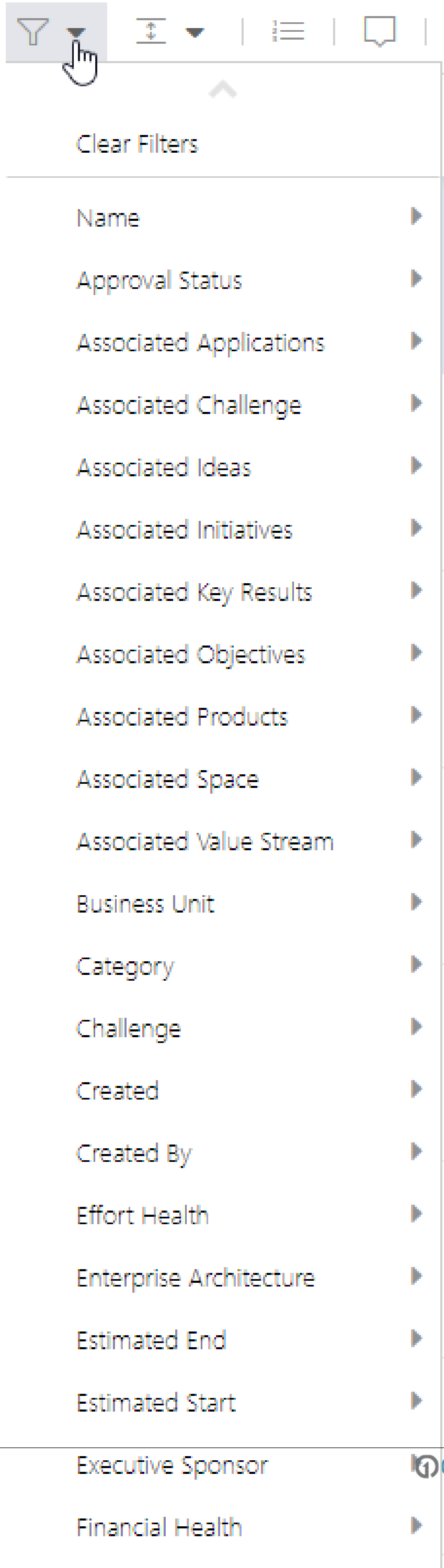


2. Add Grouping to the view to group items by a selected field. Click the **Group By** menu, and select the field you would like to group items in the view by.
In this example, I decided to group the items in my view by their **Priority**.

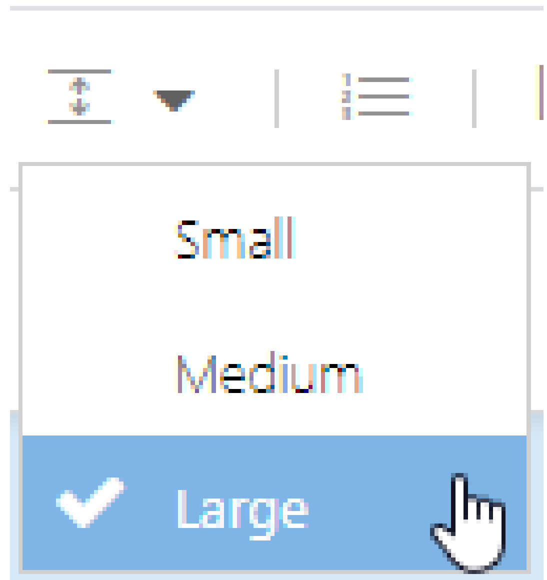
Here you can see the Priority grouping applied to the view.



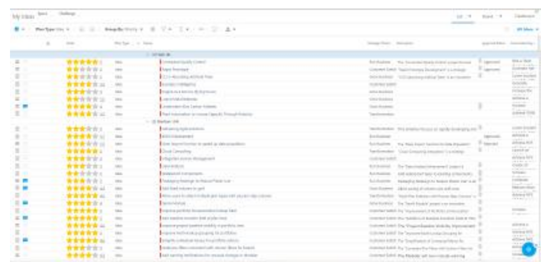
3. Add Filters to the view to reduce the number of items in the view. Click the **Filters** icon, then select the field(s) you would like to filter items in the area on.



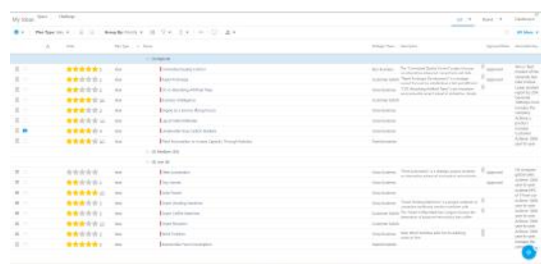
4. Set the row height. Click the **Row Height** icon, then select the desired height. Options include **Small**, **Medium**, and **Large**.



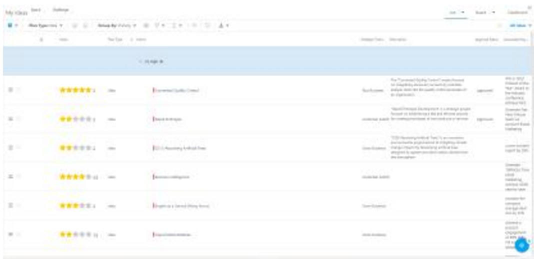
- Small row height looks like this:



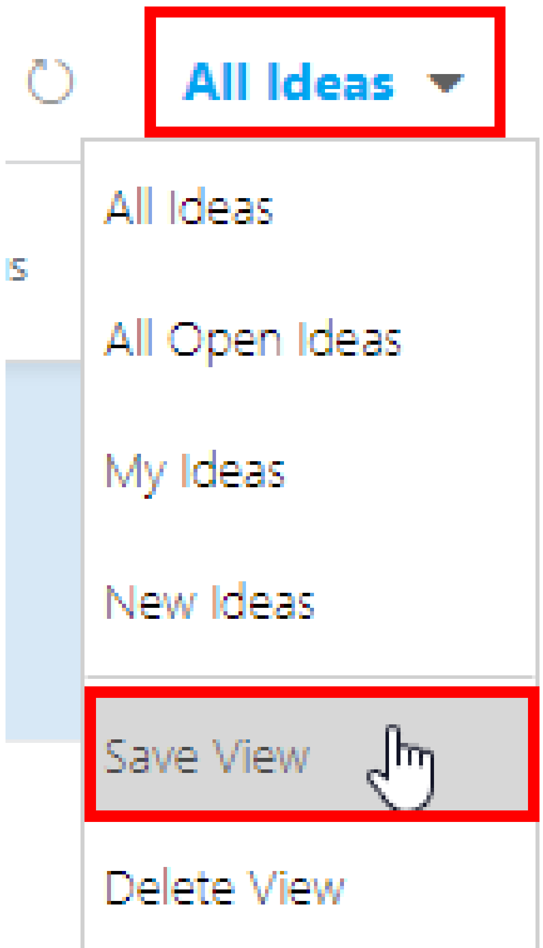
- Medium row height looks like this:



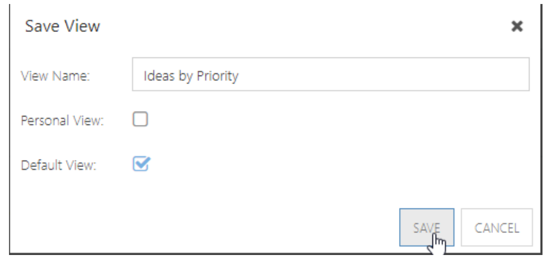
- Large row height looks like this:



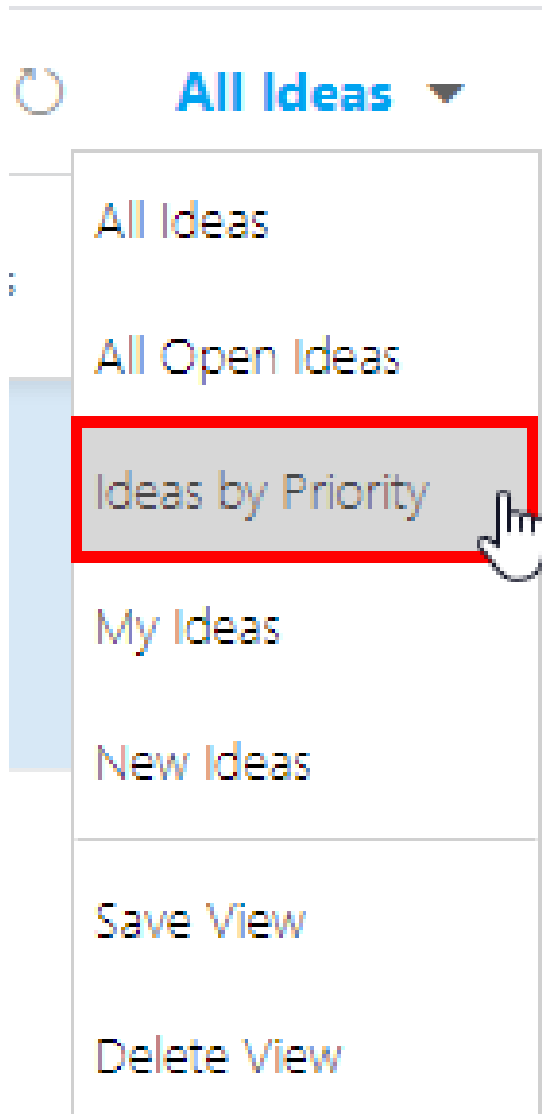
5. Save the current view for other users to utilize. Click on the **Views** menu, then select **Save View**. The **Save View** form will open.



Give your view a name, leave the **Personal View** check box blank as this will be a global view for all users to utilize, and check the phishing email check box if this view should be the default view for the area. Then click **Save**.



The new view will now be available from the **Views** menu.



Configure Plan-Level Notifications for the Innovation App

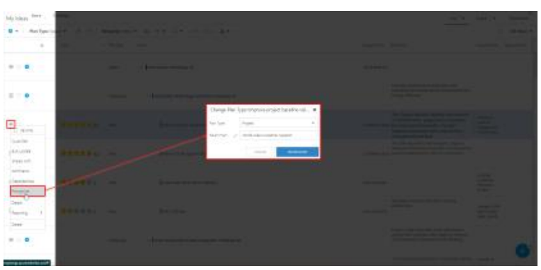
Since the Innovation App is an additional module that sits on top of the portfolio plan architecture, you can use a lot of the functionality that is available in the Portfolio area, including plan-level notifications for the various plans in the Innovation App area.

See Create and Manage Plan-Level Notifications for instructions.

Reorganize or Convert an Idea to Another Plan Type

Once you have reviewed all Ideas (or your organization's preferred plan type), you will likely want to create project plans around the most popular Ideas. In OnePlan, there are a couple of methods to kick off this process.

You can Reorganize the item into another plan type, such as a Project. Click on the contextual (hamburger) menu > **Reorganize**. Then select the Plan Type you would like to change the Idea into and its parent plan. Then click **Reorganize** to change the plan type. Reorganizing will completely move the item and all of its data into the new plan type and location in your OnePlan group. There will be no historical data about its origin.



You can also Convert the item into another plan type if plan conversions are configured for your OnePlan group. See Convert a Request into a Plan for instructions. Conversions will leave the original item in place and create a new item of the desired plan type. You can configure links between the two to maintain a historical record of that item's progression.

Requests

Requests Overview

This article introduces the Requests app in OnePlan.

To access the Requests app, you need to purchase a license for the app. Then your Administrator needs to install the app.

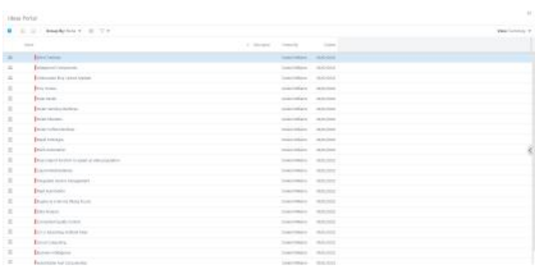
What is the Requests App?

The Requests app is an area in OnePlan where employees can submit ideas and or requests into OnePlan.

- See Create a New Request [74] for instructions to create a new request.

From there, managers can review the list of ideas and or requests, and potentially convert them into projects using the **Ideas** portal.

- See Manage Requests in the Ideas area [64] to learn how to manage and prioritize your requests.
- See Convert a Request into a Plan [65] to learn how to convert requests into different plan types so you can make innovative ideas into reality.



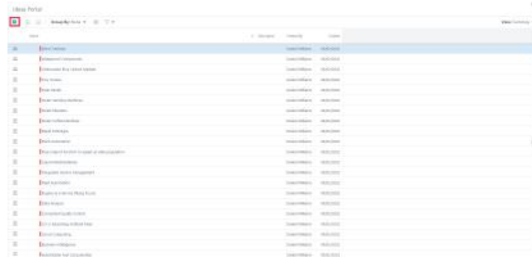
Requestor Permission

With the app, OnePlan also introduced a new user permission called Requestor. Requestors only have access to the Requests area in OnePlan. See OnePlan User Permissions [23] for more information.

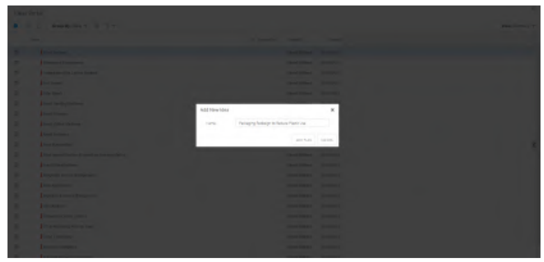
Create a New Request

This article explains how to create new requests in the OnePlan Requests app.

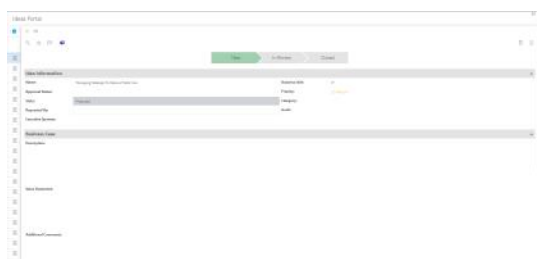
1. Click **New Item**. The **Add New Item** form will open.



2. Enter a title for your new request. Then click **Create**. The item details form will open.



3. Fill out the item details form with as much information as you can provide for your request. Your changes will auto save.



My Strategy

Manage corporate strategy

Connect long-term business strategy, goals/OKRs and results to adapt and thrive.

https://player.vimeo.com/video/565062102

Plans

Plan Types and Plan Type Structures

This article explains the different use cases for plan types in OnePlan. Your organization may follow the examples here, or your plan types may be completely unique. Plan Types are important in OnePlan as the different tools can be utilized at each plan type or level.

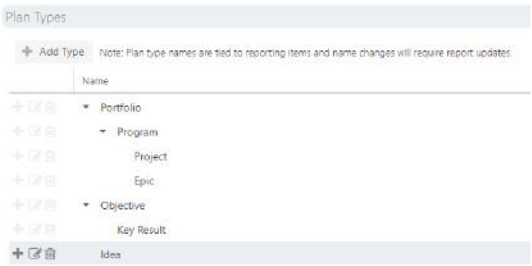
Video Length - 1:54

https://player.vimeo.com/video/755601722

Plan Types

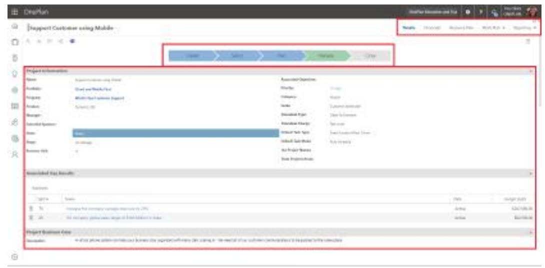
A "plan" is a general term that may be used for something to be managed and/or analyzed, such as projects, epics, portfolios, programs, initiatives, etc.

In OnePlan, each of these items is referred to as a Plan Type. Plan Types are important in OnePlan as different tools can be utilized at each plan type or level and are completely configurable to meet the needs of your organization.



When creating a new plan, you will first select the plan type (see Create a New Plan [77] for complete instructions to create a plan.) The plan details options and which features are available will be based off your plan type selection.

Each plan type may have a different plan details form, and in each form, there may be different sections, fields, stages/steps, and different planning modules. This is configured by your administrator.

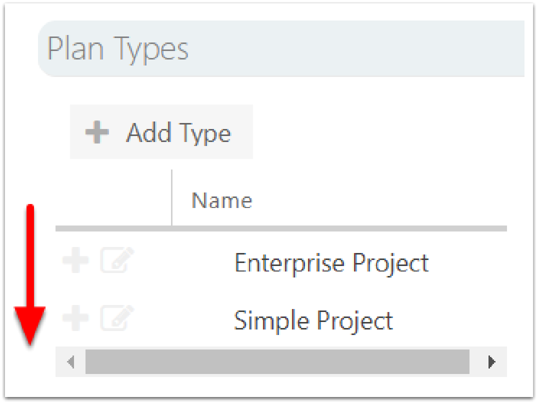


Plan Type Structures

The Plan Type structure or hierarchy is also configurable. It is important to know how your company organizes their plans, and that you understand how that structure impacts how different plans interact in your environment.

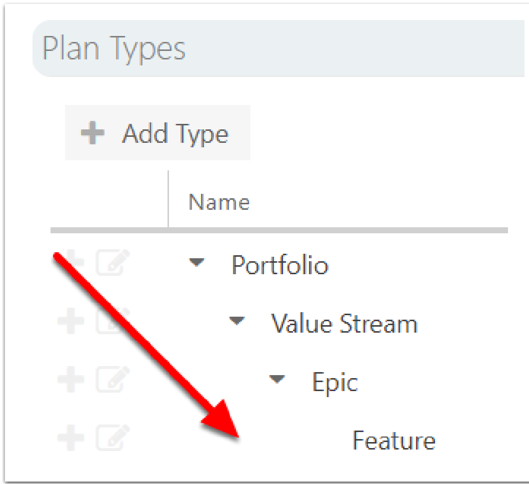
Flat Hierarchy Plan Type Structure

The first method is to have a flat hierarchy, where the plan types are not related to each other. For example, **Enterprise Project** (where perhaps the budget is over 1 million dollars) and **Small Project** (which have budgets less than 1 million).



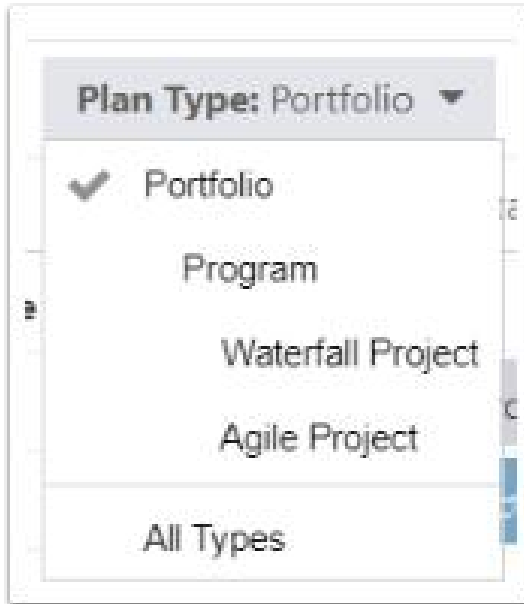
Hierarchical Plan Type Structure

The second method is to build out a hierarchy of plans where there is a parent to child lookup relationship between the plans. This also for tree grid visibility & data roll up. For example, **Portfolios** and then under the portfolios, we have children **Value Streams**, and then under the value streams, we have children **Epics**, and then under the epics, we have children **Features**.



Blended Plan Type Structure

The third method is to have a blend. You may have a hierarchy, such as Portfolios and Programs, and then at a child level have multiple different plan types that are equal in their level to each other. Such as **Waterfall Project** (for projects managed with traditional waterfall scheduling & details), and also **Agile Project** (for project teams who follow an agile or lean management process).



Create a New Plan

This article explains how to create a new plan. A "plan" is a general term that may be used for something to be managed and/or analyzed. Such as projects, epics, portfolios, programs, initiatives, etc.

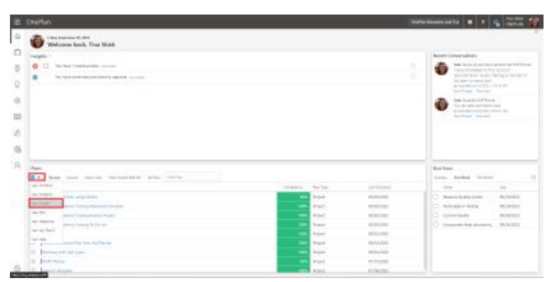
You can create a new plan in multiple locations in OnePlan including the Home Page and the My Portfolio area. Users need to have Contributor, Manager, or Owner permissions to create new plans.

Video Length - 1:57

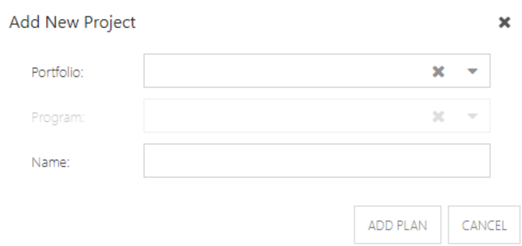
https://player.vimeo.com/video/755606143

Create a Plan from the Home Page

1. In the Plans panel, click **New Item**. Then select the plan type you would like to create. The **Add New [Plan Type]** form will open.



2. Complete the **Add New [Plan Type]** form. Depending on the plan type chosen and your environment's plan type hierarchy, you may need to specify the plan hierarchy above the new plan. Then enter the name of the new plan.



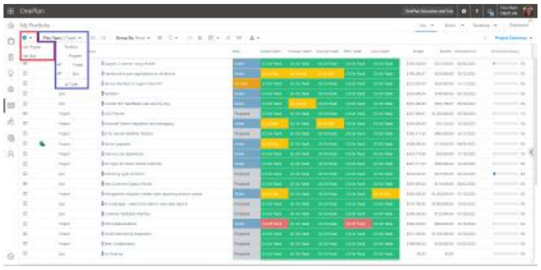
3. Click **Add Plan**. The new plan will be added to your environment.

Create a Plan from the My Portfolio Area

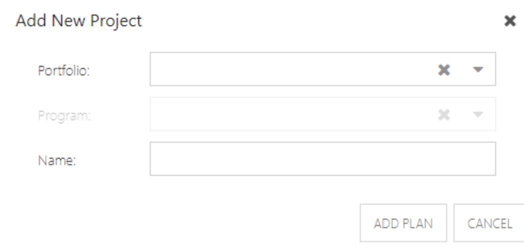
There are two ways to create a plan in the My Portfolio area:

From the My Portfolio Header

1. Select the Plan Type that you would like to create from the **Plan Type** drop down. The plan type(s) selected dictate which plan types you can create.
2. Click **New Item**. Then select the plan type you would like to create. The **Add New [Plan Type]** form will open.



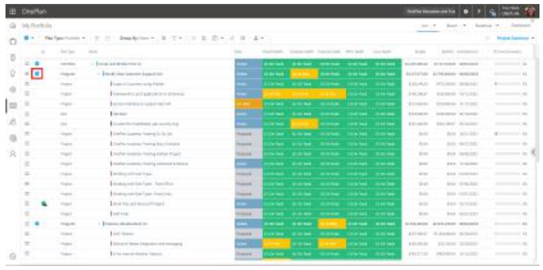
3. Complete the **Add New [Plan Type]** form. Depending on the plan type chosen and your environment's plan type hierarchy, you may need to you may need to specify the plan hierarchy above the new plan.. Then enter the name of the new plan.



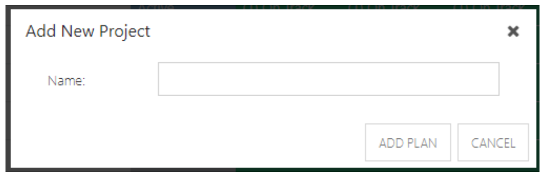
4. Click **Add Plan**. The new plan will be added to your environment.

From the My Portfolio List

You can create child plans within the list view in My Portfolio. To do this, click **Add Item** next to the plan you would like to create a child plan for. The **Add New [Plan Type]** form will open. Enter the name of the new plan.



Click **Add Plan**. The new plan will be added as a child of that initial plan.



Plan Details

After you have created the new plan, complete the plan's details. Your form may have different fields and different stages, based on your organization's use case and configuration. The page is editable and you may always return to the Details page throughout the life of the plan. When you make a change, it is saved automatically.

Delete or Archive a Plan

This article explains how to delete or archive a plan.

Deleting a plan also deletes that plan's financial plan, resource plan, tasks, etc.

Archiving a plan saves all plan data and can be restored from the OnePlan Admin pages. See Restore archived plans.

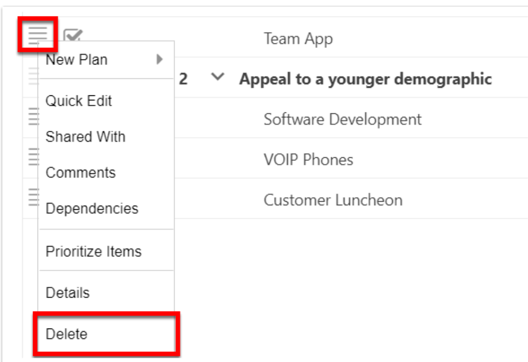
Video Length - 1:21

https://player.vimeo.com/video/755590633

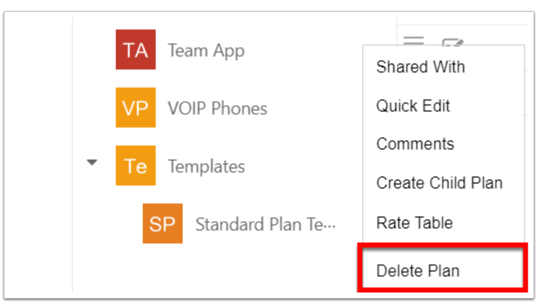
Delete a plan

Be cautious when deleting a plan! There is no undo option.

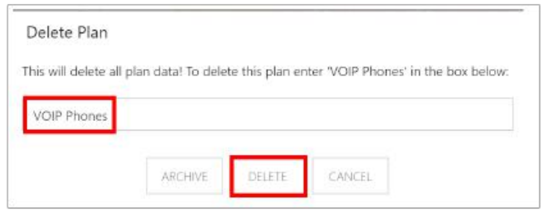
1. **From the Portfolios page**, open the contextual menu for the desired plan to delete. Select **Delete**.



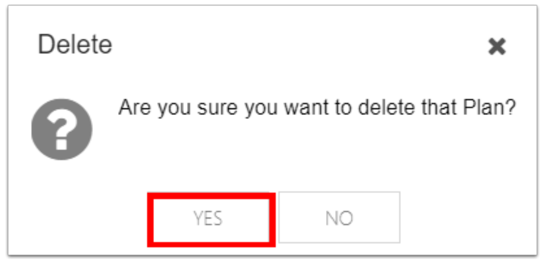
From the Plans navigation menu, open the ellipsis menu (...) for the desired plan. Select **Delete Plan**.



2. Type the name of your plan exactly in order to confirm the plan you want to delete. If you mistype, the Delete button will not continue. Click **DELETE**.

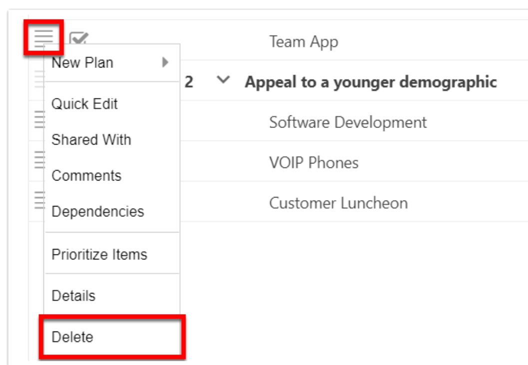


3. Click **YES** to make your final confirmation that you want to delete the plan.

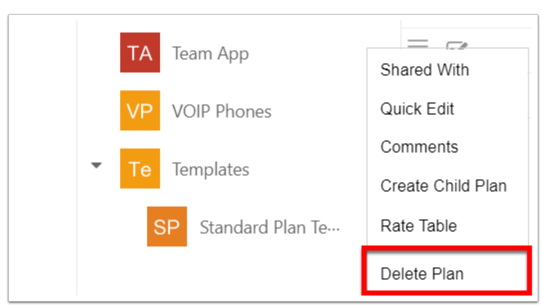


Archive a plan

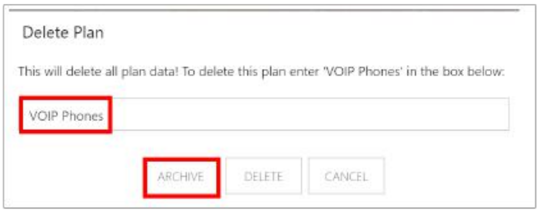
1. **From the Portfolios page**, open the contextual menu for the desired plan to delete. Select **Delete**.



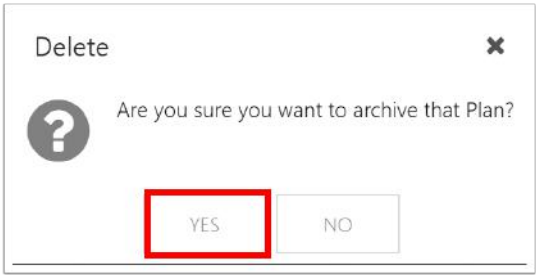
From the Plans navigation menu, open the ellipsis menu (...) for the desired plan. Select **Delete Plan**.



2. Type the name of your plan exactly in order to confirm the plan you want to delete. If you mistype, the Archive button will not continue. Click **ARCHIVE**.



3. Click Yes to make your final confirmation that you want to archive the plan.



Share a Plan

This article explains how to share a plan in OnePlan. OnePlan enables collaborative work by allowing you to share your plan with your team, and even coworkers who might not be part of your project team. In this article, we will discuss how to manage the users on your plans using OnePlan.

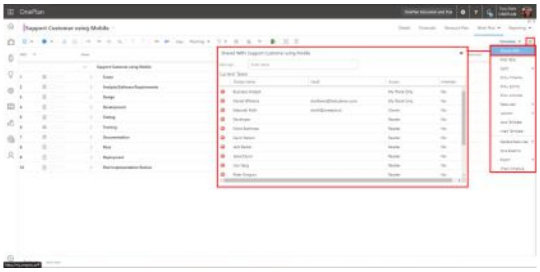
Video length - 2:19

https://player.vimeo.com/video/755274629

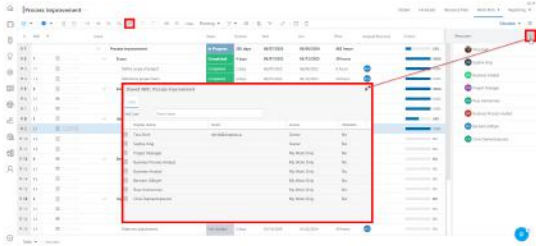
Access Plan Shared With Information

There are many ways to access the **Share With** information for your plan.

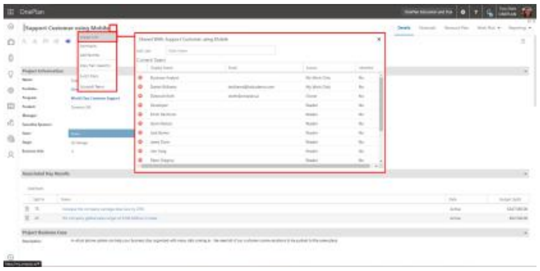
- **From the plan Work Plan list:** Open the Grid Options menu. Select **Shared With**.



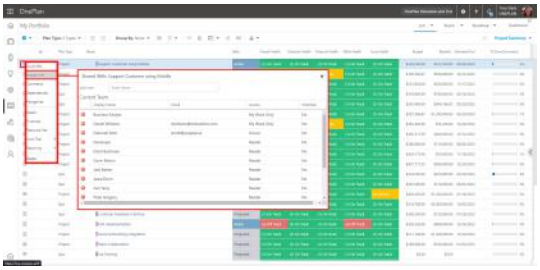
- **From the plan Resource Side Panel**: Click on the Resources icon from the Work Plan header. Then click the (**+**) icon to open the **Share With** form.



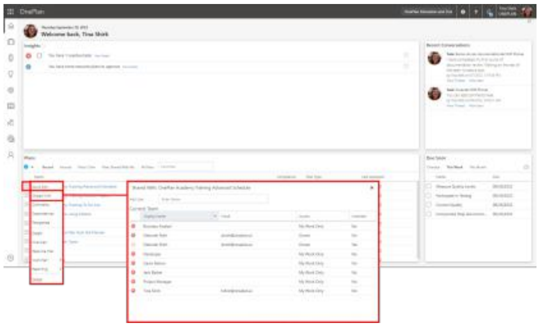
- **From the plan action menu:** Click the ellipsis and select **Shared With**.



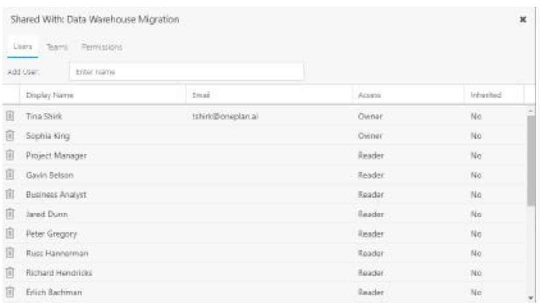
- **From My Portfolios:** open the plan contextual menu, and select **Shared With**.



- **From the Home Page Plans panel:** open the plan contextual menu, and select **Shared With**.



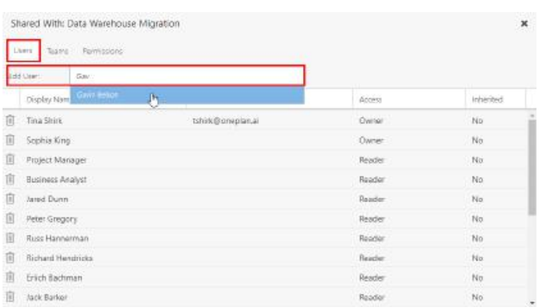
The **Shared With** form shows the plan team with each user's **Name**, **Email** address and **Access** level.



Add a User to the Plan

Now that we're in the **Shared With** form, you can add a user to your plan. Make sure you are in the **Users** tab of the **Shared With** form, then type the user's name into the **Add User** field. Once you type 3 or more characters, matching users will show for selection based on the directory of users in the Resource Center.

Newly added users will be added to the team as a **Reader**, so adjust the access level as necessary. See Edit User Access Levels for the Plan [82].



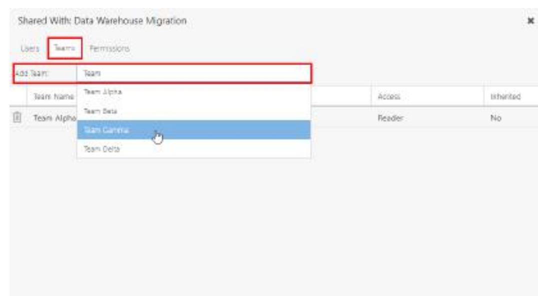
Add a Team to the Plan

You can also add entire teams of resources to plans. Go to the **Teams** tab of the **Shared With** form, then type the team's name into the **Add Team** field. Once you type 3 or more characters into the field, matching teams will show for selection based on the directory of teams in the Resource Center.

Newly added teams will be added to the plan as **Readers**. so adjust the access level as necessary.

NOTE

If you add a resource to a team, that user will automatically have access to all plans that have been shared with that team.

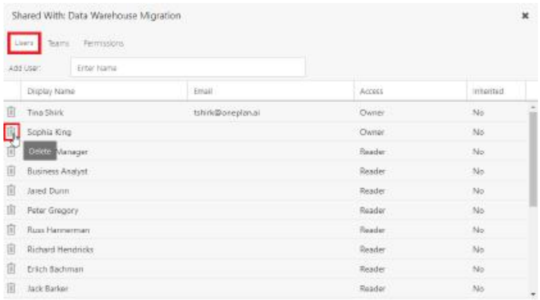


Delete a User from the Plan

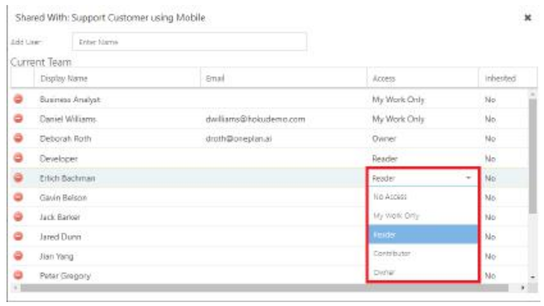
To remove a user from your plan, go to the **Users** tab of the **Shared With** form. Then click the **Delete** icon to the left of the user.

NOTE

This does not delete the user from OnePlan, just from your plan.



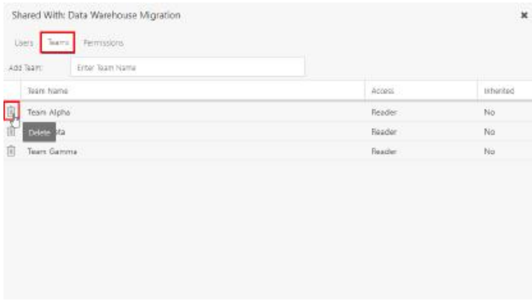
- **Contributor**: The user has edit access to the plan. The user cannot delete or archive the plan.
- **Owner**: The user has full edit rights to the plan. The user can delete or archive the plan.



Delete a Team from the Plan

To remove a team from your plan, go to the **Teams** tab of the **Shared With** form. Then click the **Delete** icon to the left of the team.

> **NOTE**
>
> This does not delete the team from OnePlan, just from your plan.



Edit User Access Levels for the Plan

To edit a user’s access level, go to the **Users** tab of the **Shared With** form. Then click in the Access column for the desired user. Select the access level from the drop-down. Options include:

- **No Access**: The user will not have access to the plan, and will not see assigned work items in My Work. The user can be assigned to tasks by the Plan Manager.
- **My Work Only**: The user will not have access to the plan. The user will see all assigned work items in their My Work area.
- **Reader**: The user has read-only access to the plan. The user will see all assigned work items in their My Work area.

What users can access and do with shared plans is dependent on the plan permissions you set, and their OnePlan environment permissions. Higher environment permissions will outweigh restrictions set on the plan level.

We have created a matrix [83]to detail how the environment and share with permissions interact. See OnePlan Plan Permission Hierarchy [83] for more information.

Edit Team Access Levels for the Plan

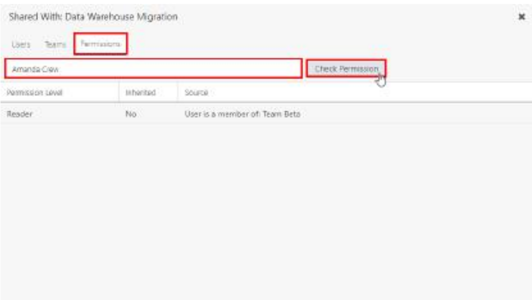
To edit a user’s access level, go to the **Users** tab of the **Shared With** form. Then click in the Access column for the desired user. Select the access level from the drop-down. Options include:

- **No Access**: The user will not have access to the plan, and will not see assigned work items in My Work. The user can be assigned to tasks by the Plan Manager.
- **My Work Only**: The user will not have access to the plan. The user will see all assigned work items in their My Work area.
- **Reader**: The user has read-only access to the plan. The user will see all assigned work items in their My Work area.
- **Contributor**: The user has edit access to the plan. The user cannot delete or archive the plan.
- **Owner**: The user has full edit rights to the plan. The user can delete or archive the plan.

Check User Permission Levels for the Plan

Because you can add both individual users and teams of users to your plans, determining their level of access/permissions to your plan can be confusing. You can use the **Permissions** tab of the **Shared With** form to check the permissions for the users on your plan team.

To check a user's permissions, go to the **Permissions** tab of the **Share With** form. Then type in the user's name into the **Enter Name** field. Once you type 3 or more characters into the field, matching users will show for selection based on the directory of users in the plan's **Shared With**. Select the user from the drop-down. Then that user's permission level and where those permissions come from show in the form below.



OnePlan Plan Permission Hierarchy

What users can access and do with plans is dependent on three factors: the Enterprise Security Group, Plan Type Security, and Plan Shared With permissions set for the user.

Enterprise Security Group

Enterprise Security Groups are where global OnePlan permissions are configured. These permission settings are at the top of the permission hierarchy. See Create and Manage Enterprise Security Groups for more information on setting up and managing global OnePlan permission groups.

Plan-related permissions configured in the Enterprise Security Group settings:

- Global Permissions:
  - **Edit all plans**: The user can edit all plans in OnePlan (e.g. make changes to plan data).
  - **View all plans**: The user can view all plans in OnePlan regardless of whether the plan is shared/not shared with that user.
- Global Plan Permissions:
  - **Add Plan**: The user can add a plan (e.g. the user will see the add blue button on the Home Page and Portfolio).
  - **Delete Plan**: The user can delete a plan.
  - **Archive Plan**: The user can archive a plan.

Plan Type Security

The goal of Plan Type Security is to allow OnePlan users the ability to control which security groups can create plans by the plan types. Plan Type Security settings are the second level of the permission hierarchy. See Set Up Plan Type Security for instructions on how to set up Plan Type Permissions

- Users whose security group has global permission of 'Administrator' are exempt from the Plan Type Security, meaning they can bypass the security and still create a plan.
- Users whose security group is without global 'Add Plan' permission will not be able to add/see the add plan buttons in the first place, so this setting does not apply to them.
- So, the users whose security group has the global 'Add Plan' permission will be the ones affected by the Plan Type Security feature.

How this feature works for affected security groups:

- If certain security groups are listed/specified in the Plan Type Security settings:
  - Only users whose security group is specified can freely create plans of this plan type.
  - What about users whose security group has 'Add Plan' permission, but the security group is not listed in the plan type security settings?
    - Then these users can create plans of this type only if they have contributor or owner access (via the Plan Share With settings) to the parent plans.
    - Example: If you have a plan type hierarchy of Portfolio > Program > Project and security is placed at the Project plan type, you will still be able to create a 'Project' plan type only if you have contributor or owner access to the parent plans. The user will be prompted to select a Portfolio and Program, and if they do not have contributor or owner

access (via the Plan Share With settings) to any Portfolios or Programs, then they will not be able to select them and therefore won't be able to proceed with the 'Project' creation.

- If no security groups are listed/specified in the plan type security settings:
  - Then any users whose security group has 'Add Plan' permission can create plans of this type.

Plan Share With

See Share a Plan for more information on sharing plans and plan Share With permissions.

Plan Share With permissions are plan-specific permissions where you can place someone to be a contributor, owner, reader, etc. of a specific plan. Plan Share With permissions are the bottom level of the permission hierarchy.

The Plan Share With permissions interacts with the Plan Type Security feature as explained in the example in the Plan Type Security section.

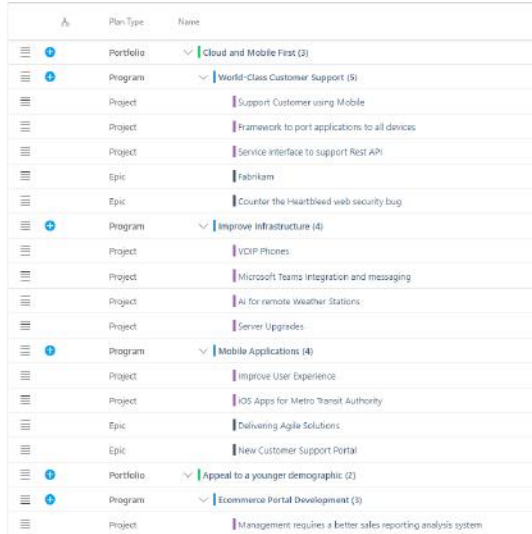
- If certain security groups are specified in the Plan Type Security settings, then only users whose security group is specified can freely create plans of this plan type.
- However, security groups that have 'Add Plan' permission but are not listed in the plan type security settings for the plan type can create plans of this type only if they have contributor or owner access (via the Plan Share With settings) to the parent plans.

Organize your Plans

This article describes how plans are organized in OnePlan.

Plan Hierarchies: Parent and Child Plans

A plan may have one or multiple children plans (sub-plans). By selecting the parent plan, the children plans' tasks show as well. The totals and summary row data rollup to the parent plan level.

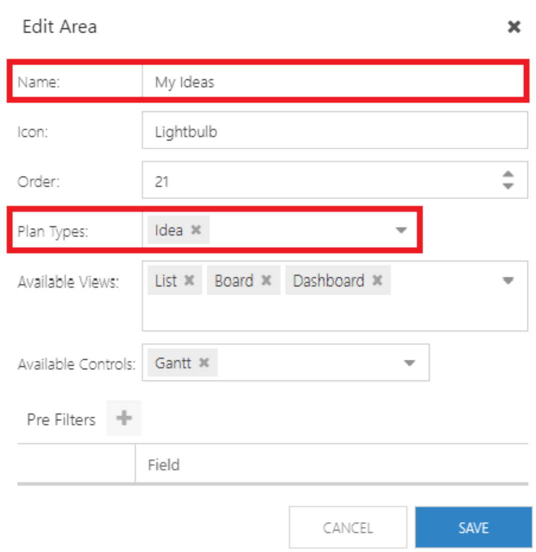


Areas

Your organization can organize different plan types into different Areas. Areas are larger units of organization and functionality in OnePlan. See Create and Manage Areas

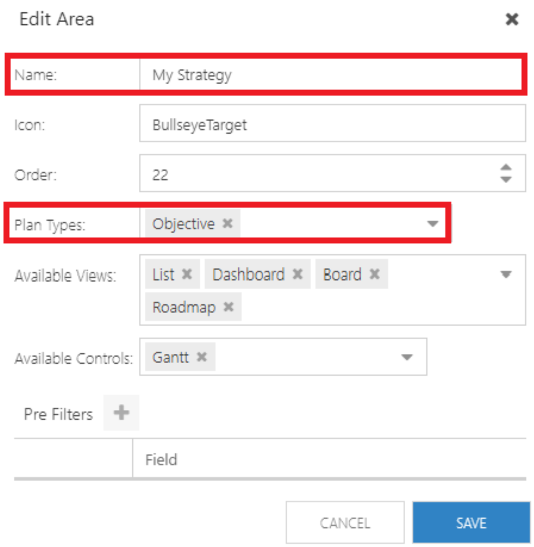
In this example, the environment has the My Ideas, My Strategy, and My Portfolio areas.

The My Ideas areas contains Idea plans and their children.

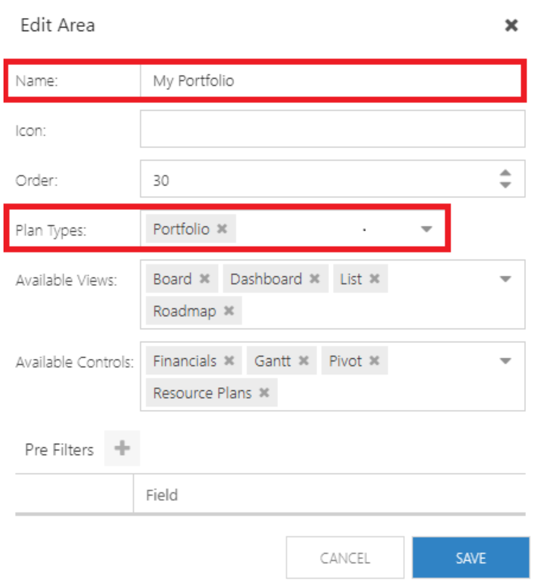


The My Strategy area contains Objective plans and their children, Key Results.

OnePlan



The My Portfolio area contains Portfolio plans and their children, Programs, Projects, and Epics.



Plan Details Overview

This article explains what the Plan Details are, and provides an overview of the buttons and features of an example Plan Details form.

https://player.vimeo.com/video/757218547

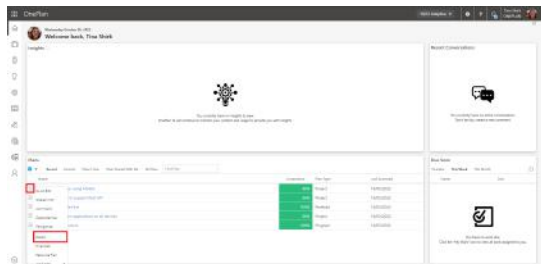
What are Plan Details?

The plan details forms in OnePlan are where plan managers will enter all metadata for a given plan. The metadata entered into the plan details directly impacts rollup values in the work plan and reports. So, the more information provided in the plan details, the better.

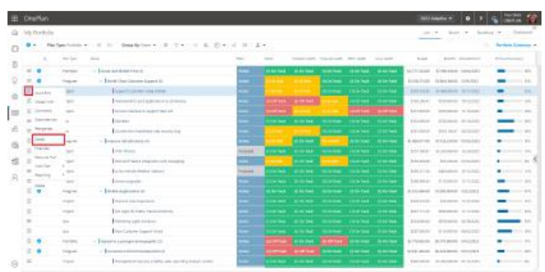
Access the Plan Details

There are a couple ways to get to the plan details for your plan.

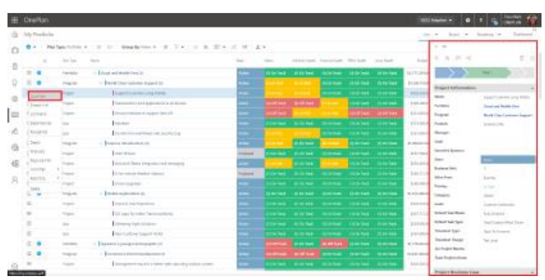
From the home page, in the **Plans** panel, click the quick edit menu next to the desired plan and select **Details**.



From the **My Portfolio** area, locate the desired plan. Click the quick edit menu and select **Details**.



You can also use the **Quick Edit** menu to open the plan details in a pop-out window.



Get Around the Plan Details

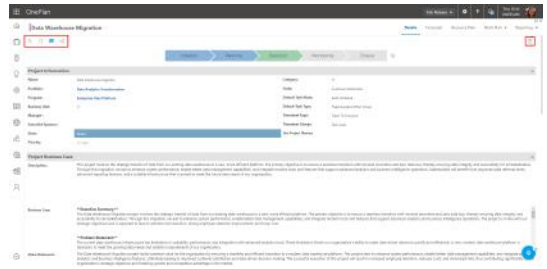
The plan details forms are highly customizable, and each organization will likely have their own twist on this form. Additionally, each plan type has its own form, and each form may be a little different depending on the kind of plan it is.

Plan Contextual Menu

Starting in the top right corner, you see this ellipsis next to the plan name. Click the ellipsis to access the plan contextual menu. Here you can:

- **Shared With:** Share the plan with other users. You can Add or remove users from the Shared With form.
- **Comments:** Add comments to the current plan.
- **Add Favorite:** Add the current plan to your Favorite list. You can access your Favorite plans from the Home page.
- **Copy Plan Hierarchy:** Here you can copy the current plan's hierarchy over to a new or existing plan. For example, you could copy all the plans from one program to another. You could also copy the program and all plans under it. This creates the plans and copies the plan level field values (it does not currently copy schedules, resource plans, etc.).
- **Switch Plans:** Locate and go to a different plan from the Switch Plans pop up.
- **Integrated Tools:** If your OnePlan group is integrated with another tool, you may access additional menu options to synch and/or launch the other integrated tools.

Plan Action Menu

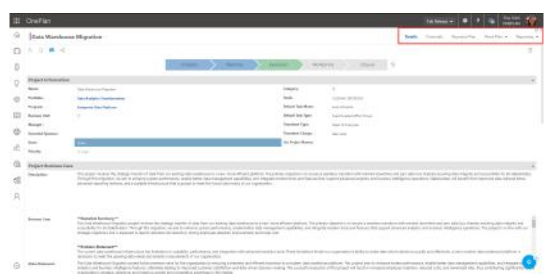


Below the plan name, are some icons.

- **Shared With:** Share the plan with other users. You can Add or remove users from the Shared With form.
- **Comments:** Add comments to the current plan.
- **Add Favorite:** Add the current plan to your Favorite list. You can access your Favorite plans from the Home page.
- **Integrated Tools:** If your OnePlan group is integrated with another tool, you may access additional menu options to synch and/or launch the other integrated tools. In the example, there is a Microsoft Teams integration.

On the left side of the screen, there is the recalculate button, which, when clicked, recalculates all rollup calculations in the plan on demand.

Planning Modules



To the right, you will see all the different Planning Modules available in this plan.

- Plan **Details** are where you enter all metadata for the given plan.
- Plan **Financials** is where you can enter and monitor the financials for the given plan.
- Plan **Resource Plan** is where you can manage the resources assigned to the given plan.

- The **Work Plan** is where you track and monitor the execution of the given plan.
- **Reporting** (Status Reports, Insights, Visualizer, Power BI Dashboards): OnePlan offers robust reporting options to give you detailed summaries of the given plan with Status Reports, Insights, Visualizer, and Power BI Reporting dashboards.

Process Steps

Here we have the plan process steps. Again, these are customizable, so this is just an example. As you progress through each step, the plan details form changes to meet the needs of the stage.

For example, let's say I start in the Plan step. The plan details form contains the Project information, Associated Key Results, Project Business Case, Project Schedule, and Project Financials sections. If I move the plan forward to the Manage step, the Plan Details form now includes Project Prioritization, Project Health and Project Trending sections.

Click on the Process History icon to access a record of the plan's progress through the various process step phases.

Process History

Step	Start	Duration	Approval State	Step State
Planning	02/15/2024	0 days	Approved	Ended
Execution	02/15/2024	0 days	Approved	Started

The process steps can also be enhanced and automated with customization and Microsoft Power Automate.

Types of Fields in the Details Form

- Plan fields are independent fields from plans. These fields are inputted directly, and are not dependent on other fields. These include fields like Name, Description, and Estimated Start.
- Summary fields aggregate data from the plan fields below it, such as % Done, Actual Cost, or Remaining Effort.
- Split fields allow you to split plan costs between parent plans.

- Trend fields allow you to easily see if key metrics are improving over time.

Edit the Plan Details Form

This article explains how to edit a plan on the Plan Details form. The form will differ, as it is configured per your organization. Also, each plan type may have different details forms.

You may also edit the plan details via the Portfolios page using Quick Edit. How do I view and edit plans from the Portfolios page? [103]

https://player.vimeo.com/video/755597959

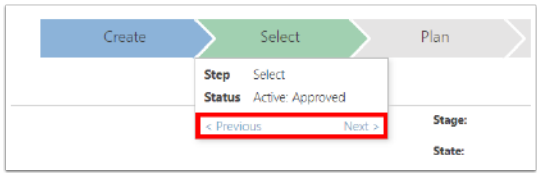
Move plan from one step to another

At the top of the Plan Details form, there may be various Process Steps. The current step is highlighted green. Previous steps are highlighted blue. Future steps are highlighted gray. Click on a step to see the status. To see the Process Step in OnePlan views, use the field called **Process Step**.

To move a plan from one step to the next:

- Select the stage/step. The name of the step & status will show. Click **Next** >.

You may also move a plan back to its previous step, if needed.



Review the Process History

Click on the Process History icon next to the process steps to access the process step history for the plan.


Process History

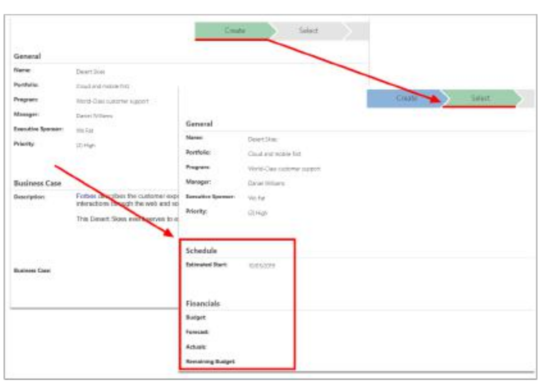
Step	Start	Duration	Approval State	Step State
Planning	02/15/2024	0 days	Approved	Ended
Execution	02/15/2024	0 days	Approved	Started

Update field values

Click into any editable field to make a change. Changes are saved immediately. If it's a choice field, make a selection from the choices. If it's a date field, select the date from the calendar. If it's a user field, begin typing the name of the user desired (must type at least 3 letters), and make your selection. If the field is multi-lines of text, you may also format the text (bold, size, etc.).

Additional fields based on step

Different sections of the Plan Details form may be shown or hidden based on the current stage/step.



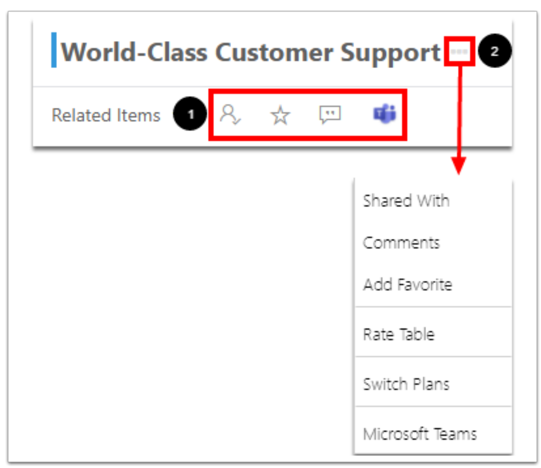
Plan actions

Perform common plan actions such as sharing a plan, favoring a plan, or adding a comment to a plan using the plan actions toolbar (1), or the plan actions menu (2).

The plan actions toolbar varies by organization and is configured by your OnePlan administrator.

Common plan actions:

- **Shared With:** Select the icon in the toolbar or Shared With from the plan actions menu to open the Shared With form. Add or remove users from the plan.
- **Add Favorite:** Select the icon in the toolbar or Add Favorite from the plan actions menu to add the current plan to your Favorites. Favorite plans appear in the Favorites tab on your Home screen.
- **Comment:** Select the icon in the toolbar or Comments in the plan actions menu to open the Comments form. View previous comments and enter a new comment.
- **Rate Table:** Select the icon in the toolbar or Rate Table in the plan actions menu to open the Rate Table form. Select, add, edit, and manage rate tables from the Rate Tables form.
- **Switch Plans:** Select the icon in the toolbar or Switch Plans in the plan actions menu to open the Switch Plans window. Locate and select the plan that you would like to go to.



Create and Manage Plan-Level Notifications

This article explains how to create and manage plan-level notifications. This means that you can create notifications for plans at any level, including portfolios, programs, projects, etc.

Plan-Level Notification Variables

{PlanName}: When creating single plan notifications, users can include the Plan Name by simply entering {PlanName} in the subject line.

Create a Plan-Level Notification

> **NOTE**
> The **Plan Notifications** schedule must be enabled by your administrator before you can create any plan-level notifications.

Who can create plan-level notifications?

- Users with "Manage Data" permissions (typically owners and managers) can create global notifications across all or many plans.
- Plan owners can create notifications around plans they own.

What kind of notifications can I create?

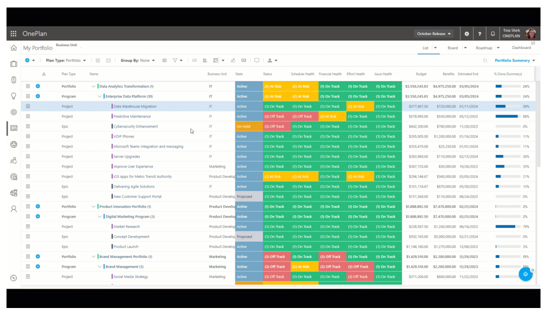
- Notifications can be triggered when a field changes, when a date passes, or when a process step changes. This allows you to be notified when important plan updates occur.

Where can I create plan-level notifications?

- You can create plan-level notifications from 2 locations in OnePlan: The My Portfolio area, and from within a plan. The instructions below detail each scenario.

Create a Notification from the My Portfolio Area

> **NOTE**
> Only users with "Manage Data" permissions can create notifications in the My Portfolio area. These notifications will be global notifications and will apply to all plans that meet the set criteria.



1. Go to the **My Portfolio** area.
2. Click on the **Notifications** icon in the header. The **Plan Notifications** form will open.
3. Click the **Add Notification** icon. The **Add Notification** form will open.
4. Complete the **Add Notification** form.
    a. Select the **Scope** for the notification. When you create notifications from the My Portfolio area, the Scope will be **All Plans**. This means the notification will apply to all plans in your environment that meet the criteria you set in the notification settings (e.g. all Programs, all Projects).
    b. Select the **Plan Type** that this notification will apply to. Options include all configured plan types in your environment (e.g. Portfolio, Program, Project, Epic).
    c. Select the **Trigger** that needs to be met for the notification to be sent. Options include **When a Field Changes**, **When a Date Passes**, and **When a Step Changes**. The form dynamically changes based on your selection here.

- When you select **When a Field Changes**: The **When** and **Changes To** fields will appear.
  - In the **When** field, select the plan-level field that will be used to trigger the notification.
  - In the **Changes To** field enter or select the value that the **When** field needs to change to for the notification to be triggered.
    So, for example, you can create a notification that will trigger *when* the **Effort Health** field *changes to* **At Risk**.
  - You can also check the **Any Value** check box which will trigger a notification to send any time the **When** field changes.
    So, for example, you can create a notification that will trigger *when* the **Active Risks** field *changes to* any value.
- When you select **When a Date Passes**: The **Field** field appears.
  - Select the date field that will be used to trigger the notification. When the date in the selected field passes, the notification will be triggered and sent out.
- When you select **When a Step Changes**: The **When** and **Changes To** fields will appear.
  - The **When** field will be auto-populated with **Process Step**.
  - In the **Changes To** field, select the step that, when a user changes the process flow to the selected step, the notification will be triggered.
    So, for example, you can create a notification that will trigger *when* the **Process Step** *changes to* **Active**.
  - You can also check the **Any Value** check box which will trigger a notification to send any time the **When** field changes.
    So, for example, you can create a notification that will trigger *when* the **Process Step** *changes to* any value (e.g. Active, Closed, Proposed)

d. (Optional) Add Filters to the notification. You can create notification filters on any plan-level field.

e. Select **When** the notification will be sent out once it has been triggered. When you create notifications from the My Portfolio area, all notifications will be sent out **Immediately**.

f. Select who the notification will be sent **To**.
  - First, select how the system will determine the users to send the notification to. Options in this first drop-down include **Specific Users**, **Field**, and **Shared With Level(s)**.
    - If you select **Specific Users**, search for and select the desired user.
    - If you select **Field**, select the plan-level user field to determine the recipient. For example, you can select **Project Lead**, and the notification will send out to the user who us assigned as the **Project Lead** for a given project.
    - If you select **Shared With Level(s)**, select the Shared With permission levels you would like the notification to send out to. For example, you can select **Owners** and **Contributors**. The notification will send out to users with either Owner or Contributor permissions to the plan.

g. Enter the **Subject** of the notification. Think of this as the email subject for this message.

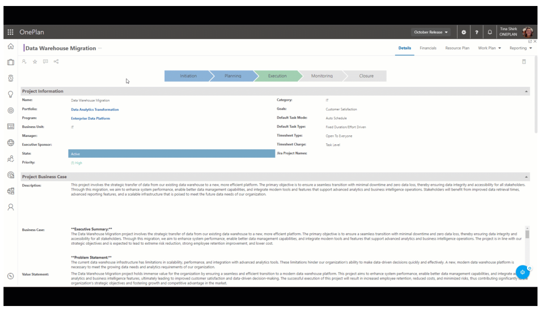
h. Select the **Fields Sent** to include in the notification message. The fields selected here will populate a table appended to the bottom of the notification message body.

i. Draft the message body for the notification. Think of this as the email body for this message. Tell the recipients what they need to know and any actions that are required of them when this notification is sent out.

5. Click **Add**. Your new plan-level notification will now be active and available.

Create a Notification from a Plan

NOTE
Typically, plan owners will create notifications from within a plan. Notifications created within a plan only apply to the plan owner's various plans, or the current plan. These notifications are not global.



1. Go to the **Details** section of a plan.
2. Click on the ellipsis next to the plan name. Select **Notifications** from the drop-down. The **Plan Notifications** form will open.
3. Click the **Add Notification** icon. The **Add Notification** form will open.
4. Complete the **Add Notification** form.
    a. Select the **Scope** for the notification. Options include **Plans I Own**, and **This Plan**.
        - If you select **Plans I Own**, the notification will apply to all plans that you are an owner of.
        - If you select **This Plan**, the notification will apply to only the current plan.

    b. Select the **Plan Type** that this notification will apply to. Options include all configured plan types in your environment (e.g. Portfolio, Program, Project, Epic).

    c. Select the **Trigger** that needs to be met for the notification to be sent. Options include **When a Field Changes**, **When a Date Passes**, and **When a Step Changes**. The form dynamically changes based on your selection here.

- When you select **When a Field Changes**: The **When** and **Changes To** fields will appear.
    - In the **When** field, select the plan-level field that will be used to trigger the notification.
    - In the **Changes To** field enter or select the value that the **When** field needs to change to for the notification to be triggered.
      So, for example, you can create a notification that will trigger *when* the **Effort Health** field *changes to* **At Risk**.
    - You can also check the **Any Value** check box which will trigger a notification to send any time the **When** field changes.
      So, for example, you can create a notification that will trigger *when* the **Active Risks** field *changes to* any value.
- When you select **When a Date Passes**: The **Field** field appears.
    - Select the date field that will be used to trigger the notification. When the date in the selected field passes, the notification will be triggered and sent out.
- When you select **When a Step Changes**: The **When** and **Changes To** fields will appear.
    - The **When** field will be auto-populated with **Process Step**.
    - In the **Changes To** field, select the step that, when a user changes the process flow to the selected step, the notification will be triggered.
      So, for example, you can create a notification that will trigger *when* the **Process Step** *changes to* **Active**.
    - You can also check the **Any Value** check box which will trigger a notification to send any time the **When** field changes.
      So, for example, you can create a notification that will trigger *when* the **Process Step** *changes to* any value (e.g. Active, Closed, Proposed)

d. (Optional) Add Filters to the notification. You can create notification filters on any plan-level field.
e. Select **When** the notification will be sent out once it has been triggered. Options include **Immediately**, **Daily**, or **Weekly**.
   - If you select **Immediately**, the notification will be sent out as soon as it has been triggered.
   - If you select **Daily**, once the the notification is triggered, it will send out daily based on the Plan Notification schedule configured by your administrator.
   - If you select **Weekly**, once the notification is triggered, it will send out once a week. The **Day of Week** field will appear. Select the day you would like the notification to send out.
f. Select who the notification will be sent **To**.
   - First, select how the system will determine the users to send the notification to. Options in this first drop-down include **Specific Users**, **Specific Teams**, **Field**, and **Shared With Level(s)**.
     - If you select **Specific Users**, search for and select the desired user(s) you would like the notification to be sent to.
     - If you select **Specific Teams**, search for and select the desired team(s) you would like the notification to be sent to.
     - If you select **Field**, select the plan-level user field to determine the recipient. For example, you can select **Project Lead**, and the notification will send out to the user who us assigned as the **Project Lead** for a given project.
     - If you select **Shared With Level(s)**, select the Shared With permission levels you would like the notification to send out to. For example, you can select **Owners** and **Contributors**. The notification will send out to users with either Owner or Contributor permissions to the plan.
g. Enter the **Subject** of the notification. Think of this as the email subject for this message.
h. Select the **Fields Sent** to include in the notification message. The fields selected here will populate a table appended to the bottom of the notification message body.
i. Draft the message body for the notification. Think of this as the email body for this message. Tell the recipients what they need to know and any actions that are required of them when this notification is sent out.

5. Click **Add**. Your new plan-level notification will now be active and available.

Portfolios

My Portfolio Planning Modules

This article provides an overview of the different planning modules available in the My Portfolio Area.

You can locate all of the Portfolio modules in the top right corner of the My Portfolio Area.

- **List**: The portfolio list provides an organized view of various projects, programs, and epics grouped under different portfolios. It presents key information such as plan types, names, states, statuses, schedule health, financial health, effort health, issue health, budgets, benefits, estimated end dates, and percentage done (summary).
- **Board**: The portfolio board is a visual representation of portfolios, programs, projects, and epics within an organization, displaying their progress, status, and other key metrics. It typically consists of cards or tiles arranged in columns or lanes, with each card representing a particular project, program, or epic within the portfolio. The columns or lanes generally represent different stages, such as proposed, active, on hold, completed, or any other custom stages according to the organization's workflow. See Portfolio Board for more information on how to use the Board.
- **Roadmap**: The portfolio roadmap is a modern and interactive visualization tool that allows you to build out roadmap timelines of the plans in your portfolio. From the roadmap view, you can view the relationships between the plans in your Portfolio, create and rearrange new plans, and create key Event markers in the timeline that may impact your Portfolio planning. See Portfolio Analysis - Roadmap for more information on how to use the roadmap.
- **Dashboard**: The portfolio dashboard holds Power BI reports related to your portfolio, allowing you and your stakeholders to easily visualize progress, blockers, etc. of your portfolio.

Portfolio Board

This article explains the features and functionality of the OnePlan Portfolio Board.

OnePlan Portfolio Board is a visual tool used to track and manage the progress of plans within a portfolio. It includes a series of columns and/or lanes that represent the different stages or phases of the plan lifecycle, and it can be used to display information about each plan, such as the plan name, owner, status, budget and more.

Portfolio Board Configuration Example

Let's begin by taking a look at an example Portfolio Board. The board view is customizable, so it can be helpful to see an example of how the board can be configured.

In this example, each column on the board represents a **Business Unit** (IT, Product Development, and Marketing in this example).

At the top of each column, you can see the total budget of all of the items within each column. So, for example, here you can see the total **Budget** (see the **Totals** setting in the header) of all of the items in the IT column equals $3,919,245.

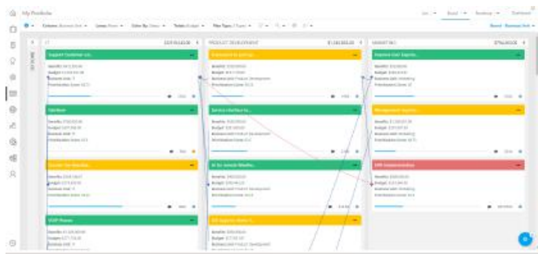
Each card in the columns represents a project or epic in your portfolio. The cards are color-coded by the project or epic **Status** (out of the box, green = On Track, yellow = At Risk, red = Off Track).

The cards also display some general information about the project or epic, including the **Benefits**, **Budget**, **Business Unit**, and **Prioritization Score**.

At the bottom of each card, you can see a bar displaying the project or epic overall **% Done**, how many days the project has been in a particular stage, and a color-coded dot representing the project or epic **State** (out of the box, light gray = Proposed, blue = Active, yellow = On Hold, dark gray = Closed). There is also a speech bubble icon you can click to add comments for a project or epic.

The lines connecting different cards on the board represent dependencies between various projects or epics. The direction of the arrow shows the direction of the successor/predecessor relationship, with the arrow pointing at the predecessor. The color of the line represents the method of the relationship, with blue lines representing regular dependent relationships, and red lines representing blocker relationships.

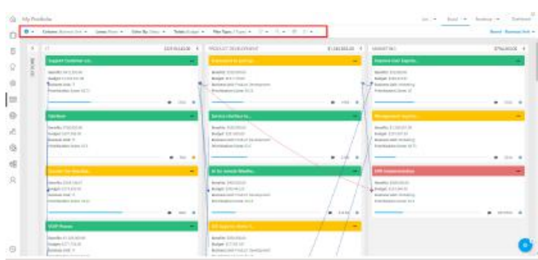
All of these settings are configurable so you can personalize the Portfolio Board in a way that works best for you.



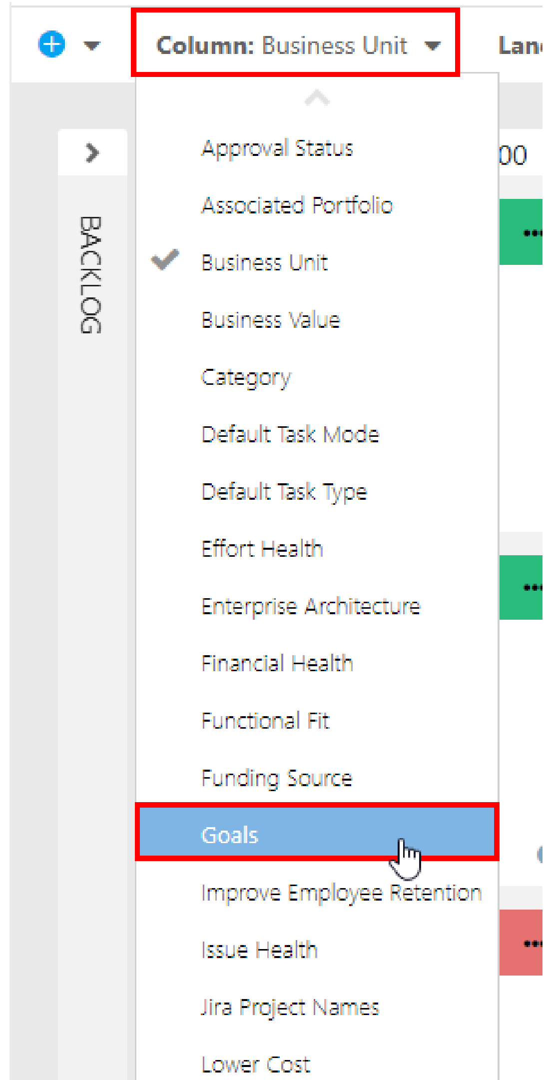
Customize the Portfolio Board

Now that we have walked through an example of a Portfolio Board configuration, let's dive into how you can configure the board for your use.

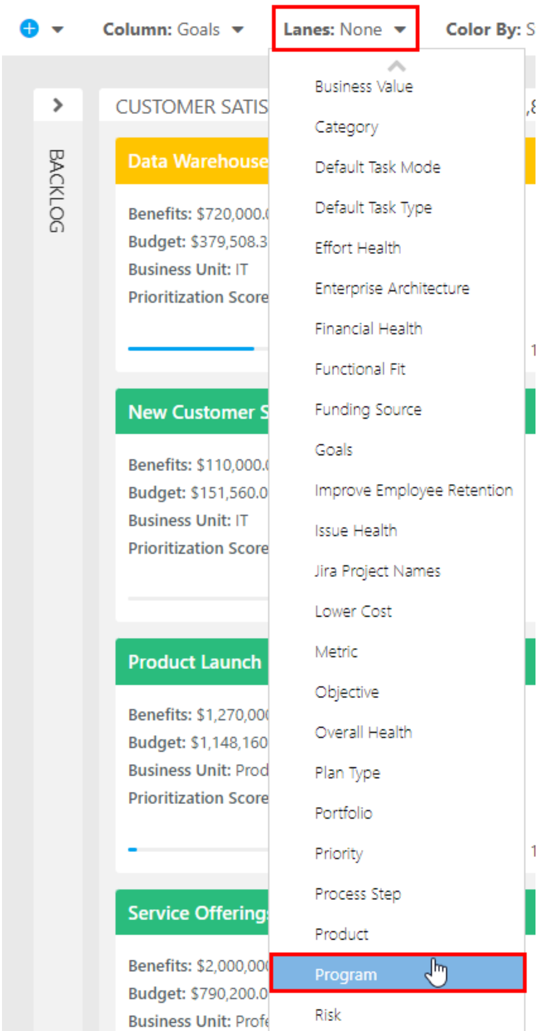
All of the board configuration settings are available here in the board header.

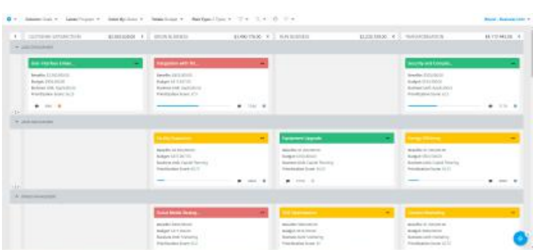


- **New Plan**: Click to create a new plan in your Portfolio. If you create a new plan from the board view, it may not display on the board immediately, as the new plan will likely not fit into the board view configuration. If you would like to view the new plan on the board, you need to go to the Portfolio List view, locate the new plan, and update the plan information so it fits into the columns and lanes of the board.
- **Column**: Select the plan field want to use for the columns in the board. For example, I will click on the **Column** menu, and select **Goals** from the drop-down. Now the **Goals** plan field will be used for the columns in the board.

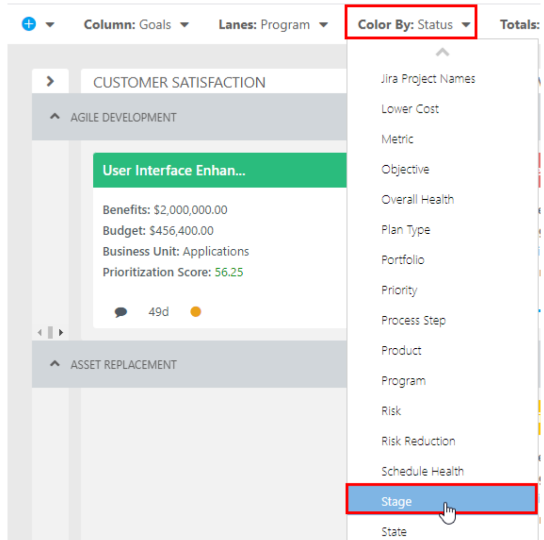


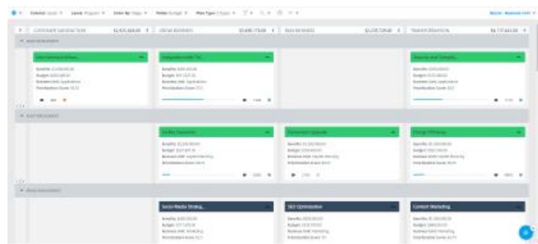
- **Lanes**: Select the plan field want to use for the lanes in the board. For example, I will click on the **Lanes** menu, and select **Program** from the drop-down. Now the board will have swim lanes to group the cards by the **Program** they belong to.



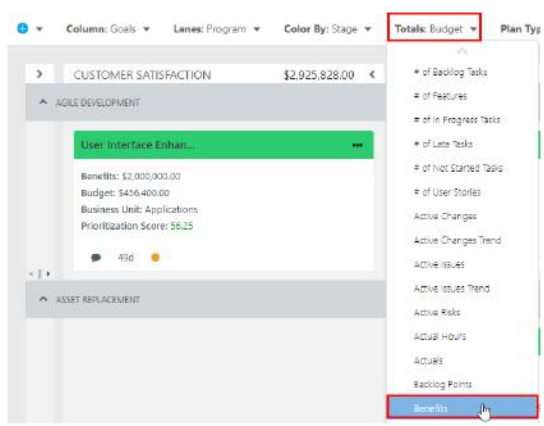


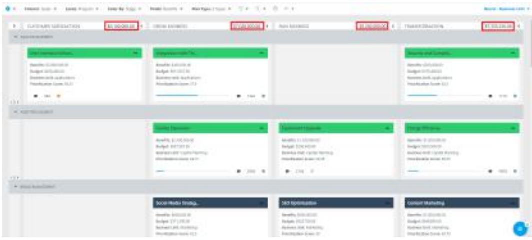
- **Color By**: Select the plan field want to use to color-code the cards on the board. For example, I will click on the **Color By** menu, and select Overall Health. Now the cards on the board will be color-coded by the project or epic **Stage**.

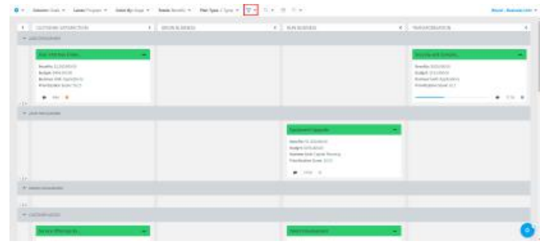




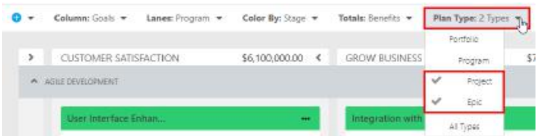
- **Totals**: Select the plan field want to use as the column totals. For example, I will click on the **Totals** menu, and select **Benefits** from the drop-down. Now the column total value is a sum of the **Benefits** values of all of the projects and epics in the column.



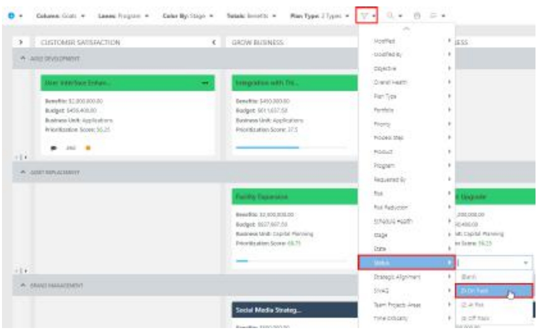




- **Plan Type**: Select the plan types you would like available on the board as cards. For example, I will click on the Plan Types menu, and in the drop-down, you can see that I could display **Portfolios**, **Programs**, **Projects**, and **Epics**. These are the different plan types that are available in the My Portfolio area currently. Here I will select **Projects** and **Epics**. This means that all of the cards on the board represent a project or epic from my portfolio of work.

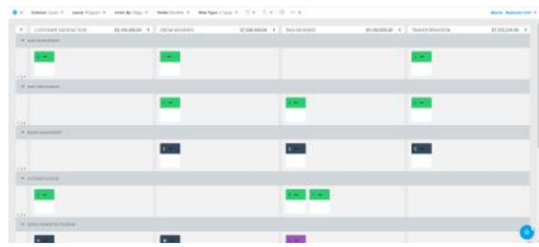


- **Filter** : Select plan fields to use as filters to limit the number of items that appear in the board. For example, I might set a filter on the **Status** field, and only load in projects and epics that have a **Status** of **On Track**.

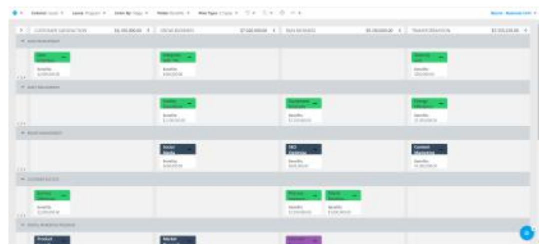


In the screenshot below, you can see the board with the Status > On Track filter applied. Notice that the **Filter** icon is highlighted blue. This means that there is a filter applied. To remove the filters, simply click on the **Filter** icon, then select **Clear Filters** (the first option in the Filter drop-down). This will remove all filters.

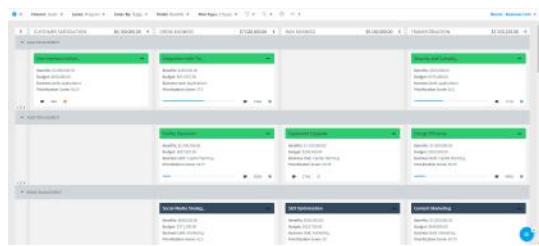
- **Zoom** : Select the size of the cards on the board. Options here include **Small**, **Medium**, and **Large**. **Large** is the default size.
  - Small cards look like this:



  - Medium cards look like this:

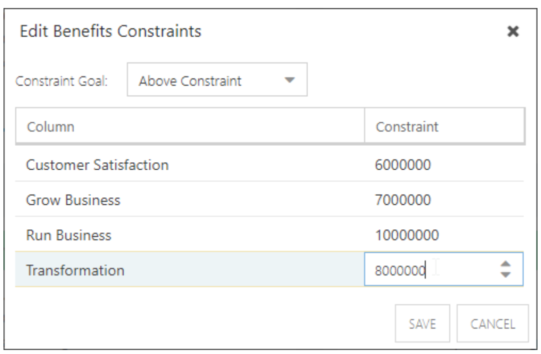


  - Large cards look like this:

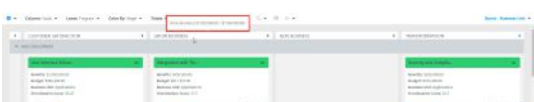


- **Constraints** : Set the constraint values for the columns in the board to run some light what-if scenarios. The constraints are based on the value you selected for the **Totals**. So, in the example I've been using throughout this article, the **Totals**, and thus the **Constraints**, are based on the **Benefits** values of the projects and epics in the board. To set constraints in the board:

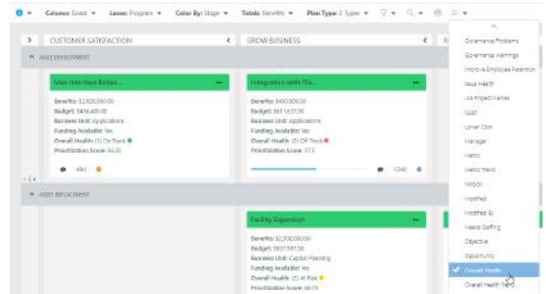
1. Click on the Constraints icon, the **Edit [Selected Totals] Constraints** form will open.
2. Select the Constraint Goal. Options include **None**, **Above Constraint**, or **Below Constraint**. Because in this example I am working with Benefits as my Total values, I want to be above the constraint value I will set, as more benefits from projects and epics = more money for the organization. So, I will select **Above Constraint**.
3. Set the constraint values for each column. Again, I am working with **Benefits** in this example. So for each column, I want to set the minimum benefits I want to see from all of the projects and epics in a column. To set these constraint values, click into the Constraint field for each column, and enter the desired value.



4. Once the constraints are all set, click **Save**. Now, when you hover over the column title, you can view the column **Total** value compared to the column **Constraint** value to see if you are hitting your goals.



- **Fields** : Select the plan fields you would like displayed on the cards on the board. Out of the box, the Benefits, Budget, Business Unit, and Prioritization Score fields are displayed on the cards. For this example, I will also add the **Funding Available** and **Overall Health** fields to the cards. To do this, click on the Fields icon, then select the desired fields (Funding Available and **Overall Health**) from the drop-down. The data from the selected fields will now be displayed on the cards on the board.



Save a Board View

Now that we have the Portfolio Board configured to our liking, we can go ahead and save this view for later use. To save a view:

1. Click on the **Views** menu. Then select **Save Board**.
2. The **Save View** form will open. Complete the form.
3. Enter a name for your view.
4. If you are an Admin, you will see the Personal View check box. Check the check box if you want the new view to be a personal view only. Otherwise the view will be a Global view for all users in your OnePlan environment.

> **NOTE**
> If you do not have Admin permissions, you will NOT see the **Personal View** check box, and every board view you save will be a personal view.

5. Check the **Default View** check box if you want the new view to the the default view that loads when you go to the Portfolio Board.
6. Click **Save**. Your new view will now be available in the **Views** menu.

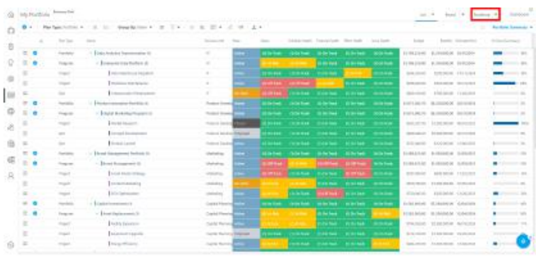
Portfolio Analysis - Roadmap

This article explains how to use the Portfolio Roadmap.

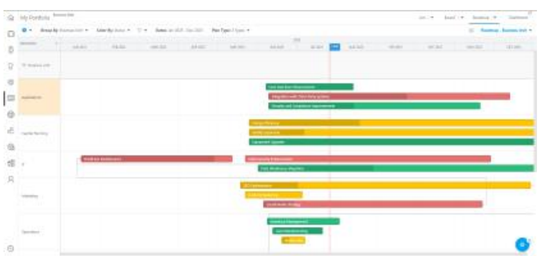
The Portfolio Roadmap is a modern and interactive visualization tool that allows you to build out roadmap timelines of the plans in your Portfolio. From the Roadmap view, you can view the relationships between the plans in your Portfolio, create and rearrange new plans, and create key Event markers in the timeline that may impact your Portfolio planning.

Access the Roadmap Page

To access the Portfolio Roadmap, go to the **My Portfolio** area. Then click **Roadmap** in the upper right corner. This will open the **Roadmap** page to its default view.



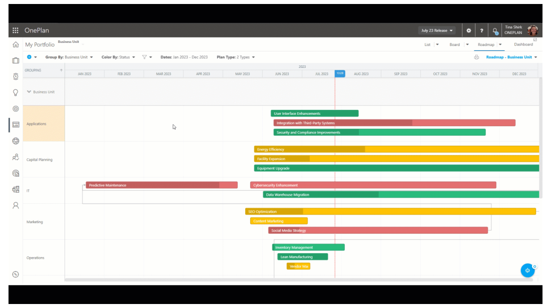
The Portfolio Roadmap page lists each plan in a roadmap timeline.



Create New Plans in the Roadmap

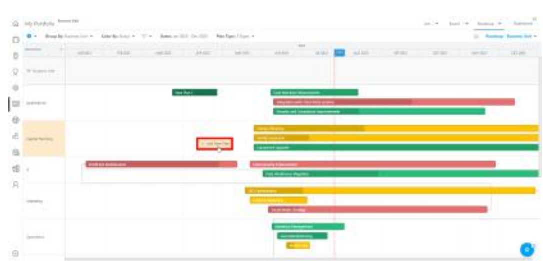
You can create new plans to add to your Roadmap. There are three ways to create a new plan in the Roadmap:

1. Click and drag directly on the Roadmap.
    a. Click and drag your mouse to create a new bar in the date range you would like for your new plan. When you let go of your mouse click, the **Add New Plan** form will open.
    b. Complete the **Add New Plan** form.
        - Select the **Plan Type** for your new plan.
        - Select the **Parent Plan** for your new plan, if applicable.
        - Give your new plan a **Name**.
    c. Click **Add Plan**, and your new plan will appear in your Roadmap. The plan's **Quick Edit** form will also open on the right of the screen.



2. Right-click directly on the Roadmap.
    a. Right-click on the Roadmap on the date you would like your new plan to start. Then click **Add New Plan**. The **Add New Plan** form will open.
    b. Complete the **Add New Plan** form.
        - Select the **Plan Type** for your new plan.
        - Select the **Parent Plan** for your new plan, if applicable.
        - Give your new plan a **Name**.
    c. Click **Add Plan**, and your new plan will appear in your Roadmap. The plan's **Quick Edit** form will also open on the right of the screen.

> **NOTE**
> Using the right-click method will create a plan with a 1-month duration by default. The plan bar will begin where you initially right-clicked on the Roadmap.



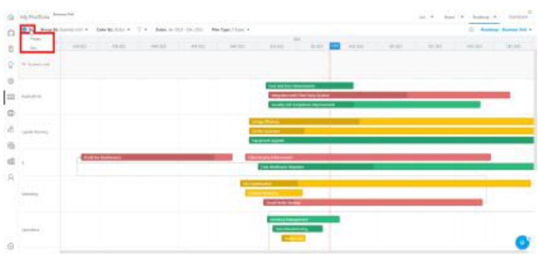
3. Use the **New Plan** button in the header.

a. Click the **New Plan** button. Select the desired Plan Type from the drop-down. The **Add New [Plan Type]** form will open.

b. Complete the **Add New [Plan Type]** form.
   - Select the **Parent Plan** for your new plan, if applicable.
   - Give your new plan a **Name**.

c. Click **Add Plan**. The plan's **Quick Edit** form will also open on the right of the screen.

> **NOTE**
> The plan's bar will not appear in the Roadmap until you add **Estimated Start** and **Estimated End** dates. You can add this information to the plan using the Quick Edit form. Once the dates are entered, the plan's bar will appear in the Roadmap.



Create Events in the Roadmap

Events are timeline markers that allow you to easily bring attention to special dates like milestones, release dates, program increments, etc. Saving a view will save the events to that view. There are two ways to create a Roadmap Event:

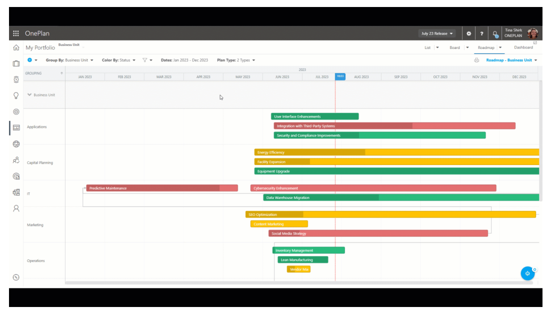
1. Click and drag directly on the top row of the Roadmap.

   a. Click and drag your mouse to create a new bar in the date range you would like for your new Event. When you let go of your mouse click, the Event **Information** form will open.

   b. Complete the **Information** form.
      - Give your new Event a **Name**.
      - Update the **Start** and **Finish** dates and times if necessary.

   > **NOTE**
   > Setting an Event's duration to a single day (so the Start and Finish dates are the same) will change the Event bar into a diamond in the Roadmap.

   c. Click **Save**, and your new Event will appear in your Roadmap.



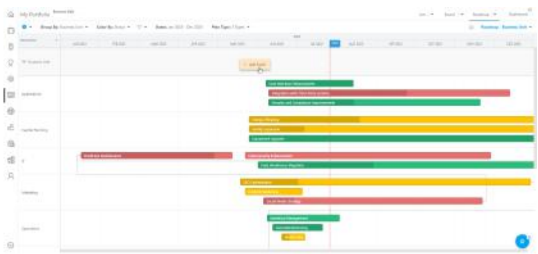
2. Right-click directly on the top row of the Roadmap.

   a. Right-click on the Roadmap on the date you would like your new Event to start. Then click **Add New Event**. The Event **Information** form will open.

   b. Complete the **Information** form.
      - Give your new Event a **Name**.
      - Update the **Start** and **Finish** dates and times if necessary.

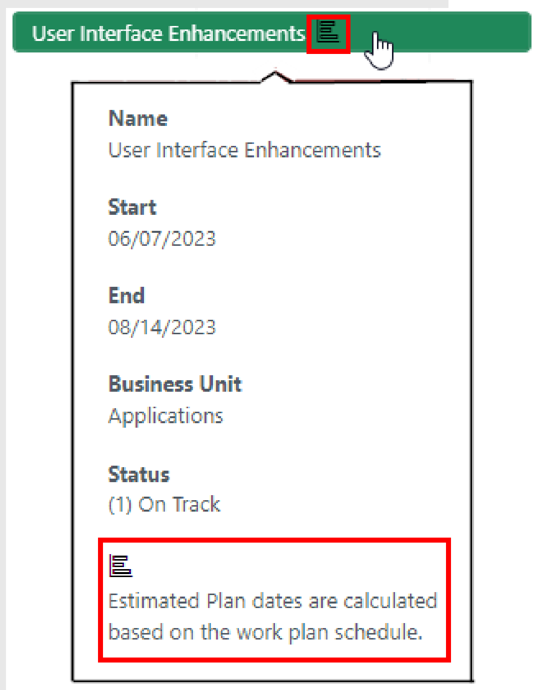
   > **NOTE**
   > Setting an Event's duration to a single day (so the Start and Finish dates are the same) will change the Event bar into a diamond in the Roadmap.

   c. Click **Save**, and your new Event will appear in your Roadmap.



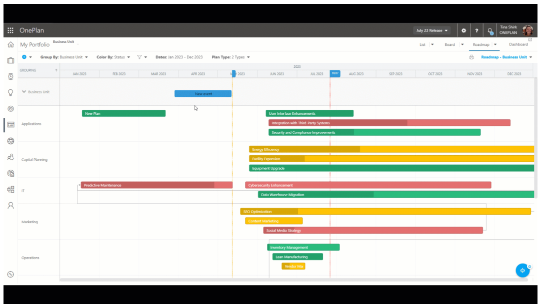
Resize and Rearrange Plans in the Roadmap

> **IMPORTANT**
>
> You can only resize and rearrange plans with NO tasks. Once tasks are added to a plan, it becomes locked in place in the Roadmap. A Gantt icon will show on the plan bar indicating that plan has tasks. Additionally, when hovering over the plan bar of a an immovable plan, a message will also appear in the tooltip stating"Estimated Plan dates are calcualted based on the work plan schedule."



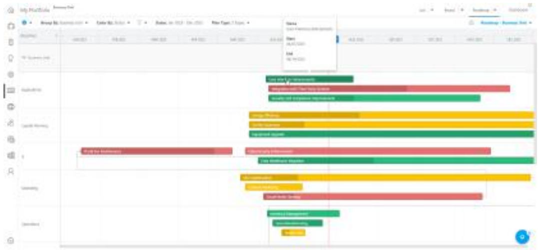
You can change the date range of the plans and Events in your Roadmap by hovering over the ends of the bars until your cursor changes into a left/right slider. Then click and drag the end of the bar to the desired date.

You can also completely move plans and Events by clicking on a bar, then dragging and dropping the bar to the desired location in the Roadmap.



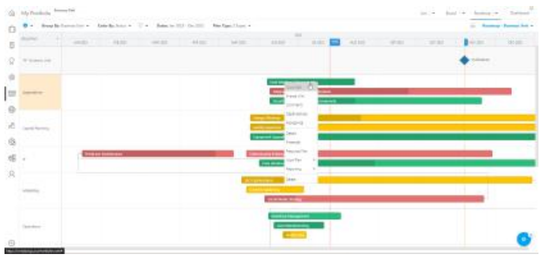
View Plan and Event Information in the Roadmap

Hover over the bars in the Roadmap to preview basic Plan information, including the plan name, start date, and end date.

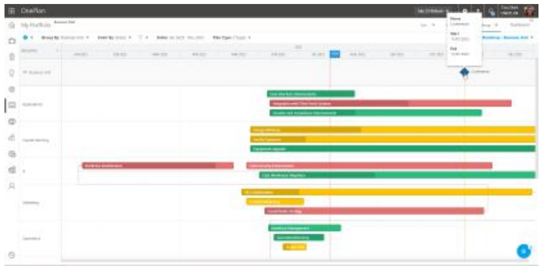


Right-click on a plan bar to access that plan's Contextual menu. Options in the Contextual menu include:

- **Quick Edit**: Click to open the plan's Quick Edit window.
- **Share With**: Click to access the plan's Share With form.
- **Comments**: Click to access the plan's Comments thread. You can respond to and make new comments from this thread.
- **Dependencies**: Click to access the Dependencies form for the plan. You can manage dependencies between plans from this form. See Portfolio Dependencies: Manage Dependencies Between Plans [118] for more information.
- **Reorganize**: Click to access the Plan Reorganize form. From this form, you can change the Plan Type of the plan, and change the plan's parent plan.
- **Details**: Click to access the plan's Plan Details form.
- **Financials**: Click to access the plan's Financial Plan.
- **Resource Plan**: Click to access the plan's Resource Plan.
- **Work Plan**: Click to access the plan's Work Plan list or board.
- **Reporting**: Click to access the Reporting pages for the selected plan.
- **Delete**: Click to delete the current plan.

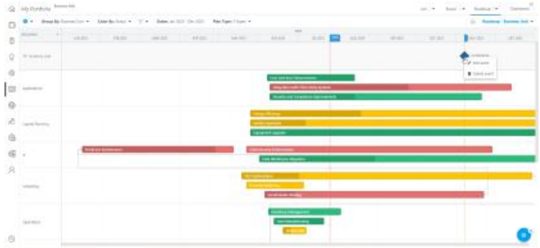


Hover over an Event bar or diamond to preview basic Event information, including the Event name, start date, and end date.

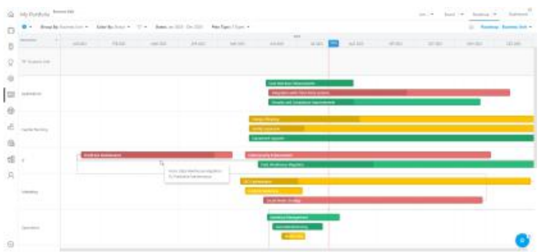


Right-click on an Event bar or diamond to access that Event's Contextual menu. From the Event Contextual menu, you can:

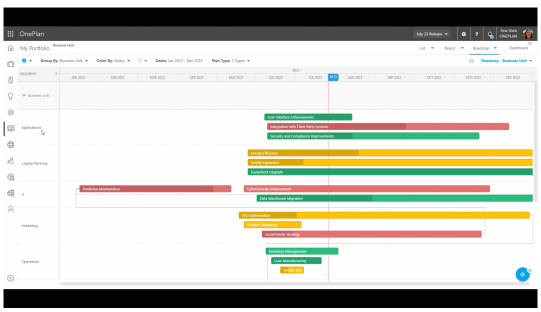
- Edit the Event
- Delete the Event



Hover over the gray dependency lines between plans to view how the plans are connected, including the To and From Plans.

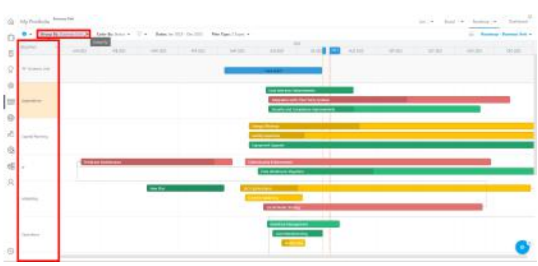


Hover over any blank space in the Roadmap to view the date.



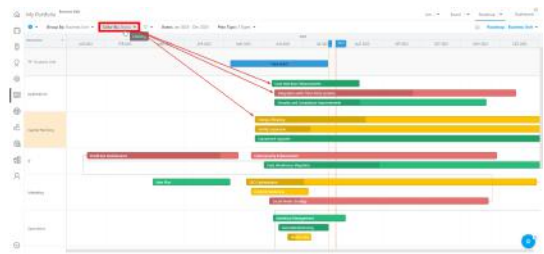
Group Plans in the Roadmap

Use the **Group By** menu to select a plan-level field to group the Plans in your Roadmap. For example, you could group the plans by Business Unit or Risk.



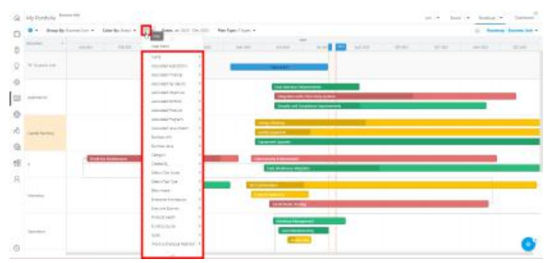
Change the Roadmap Bar Colors

Use the **Color By** menu to select a plan-level field to use as the color coding method of the bars in your Roadmap. For example, you could choose to have the bars colored by Status, or % Done.



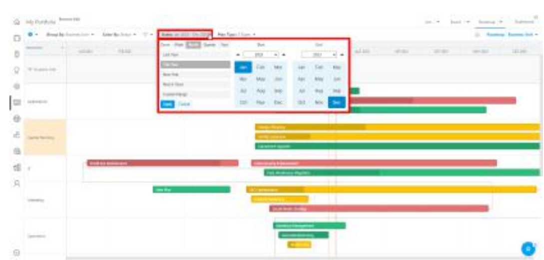
Filter the Plans in the Roadmap

Use the **Filters** menu to apply filters to the Roadmap to narrow down the plans that are available in the Roadmap. For example, you may want to only view plans with a certain Status.



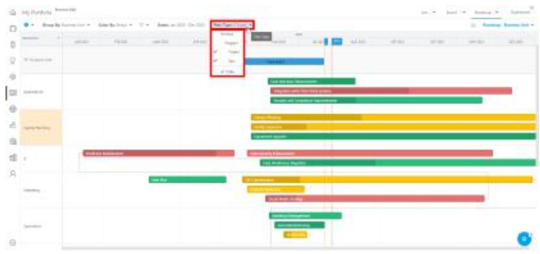
Set the Date Range in the Roadmap

Use the **Dates** menu to set the date range you would like to view in the Roadmap. You can select a date range preset, or set a custom range.



Select Which Plan Types are Available in the Roadmap

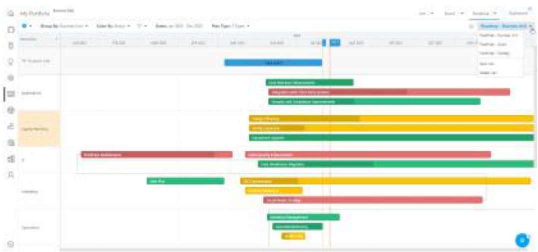
Use the **Plan Types** menu to select the kinds of plans you would like included in your Roadmap. For example, you may only want to look at Projects and Epics.



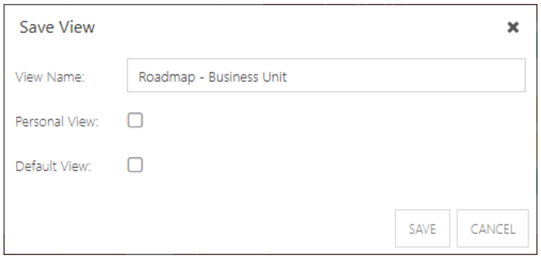
Save a Roadmap View

After you have made changes to the Roadmap view, including applying groupings, dates, bar colors, etc. you can save that view to use again. To save a Roadmap view:

1. Click on the **View** menu and select **Save View**. The **Save View** form will open.



2. Complete the Save View form.

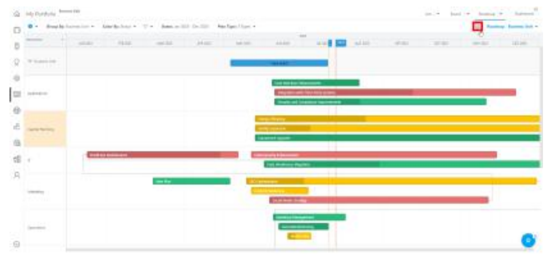


- **View Name**: Initially, the current view name will show. Update to a new name. If updating a view rather than saving a new view, keep the name as-is.
- **Default View**: Check the checkbox if this is a default view. A default view will open automatically when you go to the Work Plan.
- **Personal View**: Check the checkbox if this is a personal view. It is checked by default. Administrators may save a view as a global view for the group by deselecting the checkbox.

3. Click **Save**. Your new view will now be available for use from the **View** menu.

Save the Roadmap as a Printable Image

Click the **Print** icon to save the current Roadmap view as a printable PNG image. The PNG file will save to your Downloads folder after it is generated.

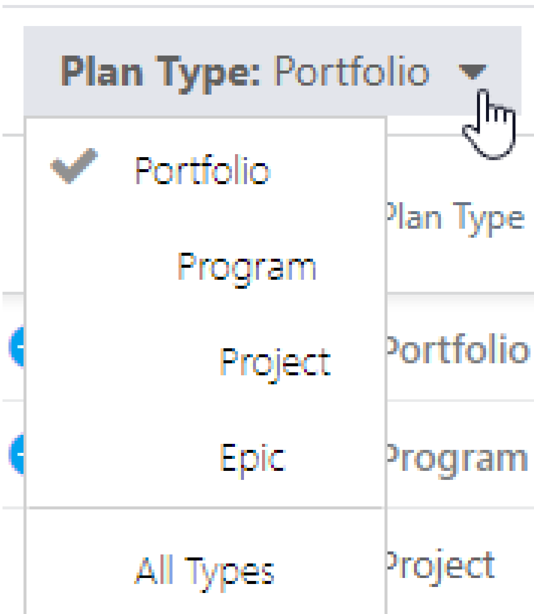


Manage Plans in the My Portfolio List

This article provides a basic overview of how to manage your portfolio of plans in the OnePlan My Portfolio Area.

Select Plan Type(s)

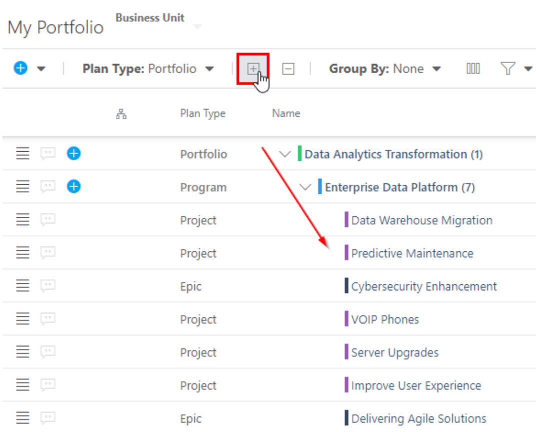
The first thing you need to do when working in the My Portfolio area is select the kinds of plans you want to work with. Since the My Portfolio area can contain several plan types, and plan type hierarchies, the amount of data displayed in the Portfolio can be a lot to digest. To narrow down the view to only the plan types you are interested in, click the **Plan Type Menu** to select the plan type(s) you would like to view in the Portfolio grid.



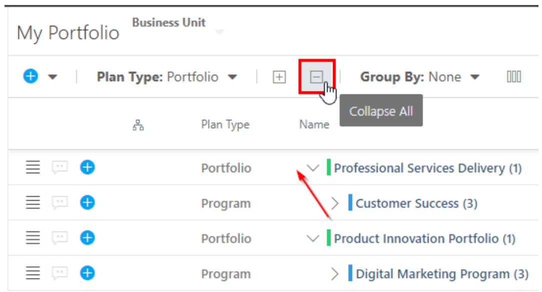
Expand and Collapse Plans in the Portfolio List

As mentioned before, the My Portfolio area can contain a lot of data. You can use the Expand and Collapse buttons to quickly navigate through the different layers of your Portfolio hierarchy, making the management of all of your plans a little easier.

Click the **Expand** icon to show all plans and sub-plans in the Portfolio.



Click the **Collapse** icon to minimize the plans.



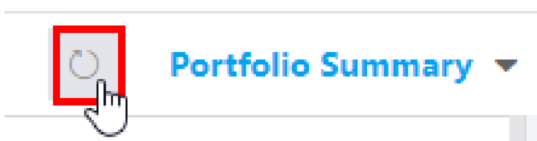
Update Plan Information in the Editable Grid

The Portfolios List is editable. Add any columns to the view you want to edit. If the field is editable and you have permission to edit that item, click on the desired field to change. Certain fields may not be available for certain plan types, based on configuration. In that case, you won't be able to edit the value.

You can also bulk-update values in the Portfolio grid. See Bulk Edit Plan-Level fields from My Portfolio for instructions.

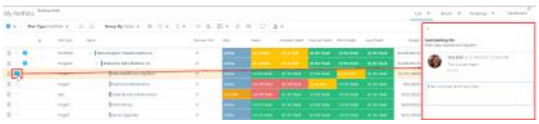
Recalculate Values

As you are working in the My Portfolio area, and data is being updated, some data might get out of sync. You can use the Recalculate function to recalculate data in the Portfolio on demand. Click the **Recalculate** icon to manually recalculate calculated fields (including rollup fields) in the Portfolio.



Comment on Plans

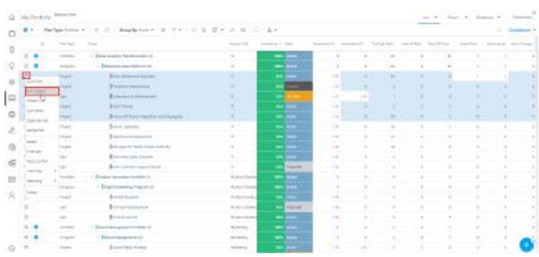
Next to each plan in the Portfolio list is a **Comments** icon. Click on the icon to add a comment or access an existing comment thread for that plan.



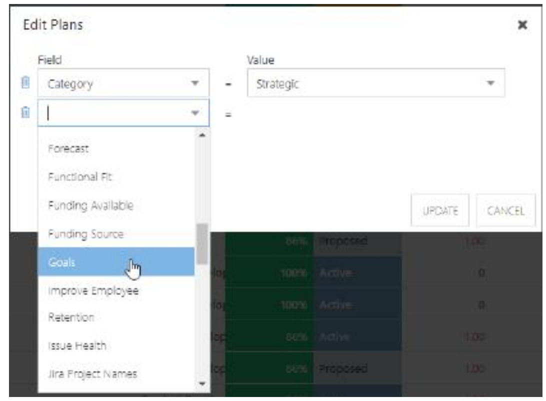
Bulk Edit Plan-Level Fields from My Portfolio

This article explains how to bulk edit plan-level fields in the My Portfolio area.

1. First, highlight all of the plans you want to update by holding down CTRL on your keyboard, then clicking the desired plans.
2. Then, click the contextual menu (hamburger icon next to the plan name) and select Bulk Update. The Edit Plans form will open.

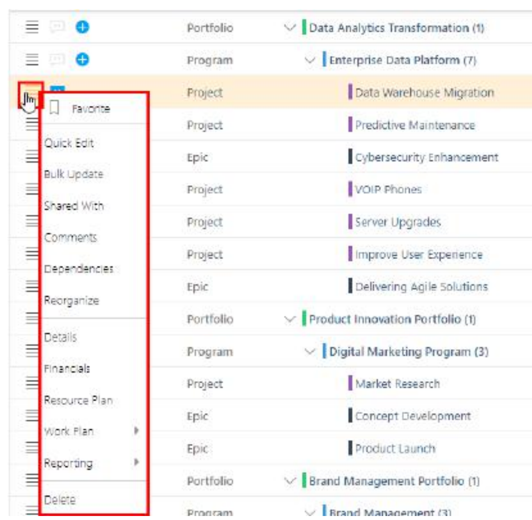


3. In the **Field** column, select the field(s) you would like to update. In the **Value** column, select or set the value you would like to update the selected field(s) to.
4. To update multiple fields for the selected plans, click **Add Field**, then select a **Field** and **Value** as described in Step 3. Repeat as needed to update all desired fields.
5. Click **Update** to apply the updates to the selected plan fields.



Use the Portfolio Plan Contextual Menu

Select the contextual menu for a plan to see the available planning modules and options for that plan. Based on a plan's type and stage, certain features may or may not be available.

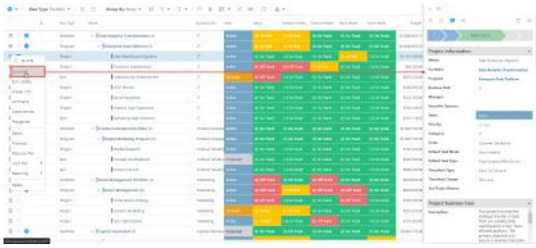


Favorite

Click **Favorite** to mark the selected plan as a favorite. This plan will then be listed in the Favorites tab of the Plans Panel on your Home Page.

Quick Edit

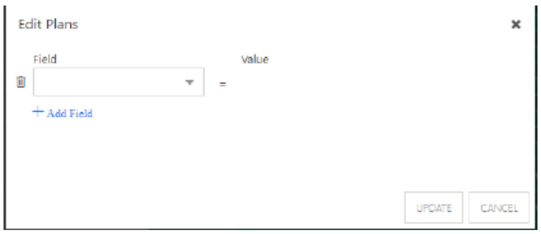
Select Quick Edit from the plan's contextual menu. On the right side of the screen, the plan details form appears, condensed to one column. Scroll up & down for the plan fields. Click the Expand icon to open a larger view of the plan details form. The form is editable and your edits save automatically.



Bulk Update

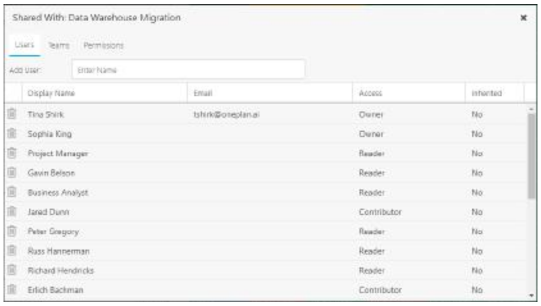
You can use the Bulk Update function to quickly update multiple fields and values for multiple plans in your Portfolio all at once.

See Bulk Edit Plan-Level Fields from My Portfolio for instructions on how to use this Bulk Edit function.



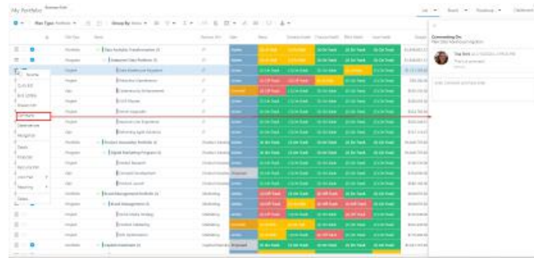
Shared With

Click **Shared With** from the contextual menu to quickly access a plan's Shared With form. The Shared With form lists all of the users who have access to a particular plan, along with their plan-level permissions.



Comments

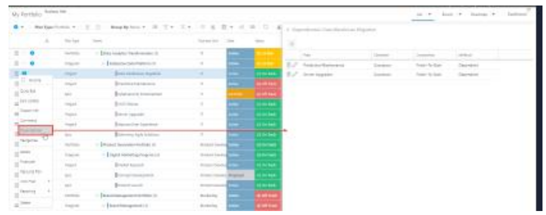
Click **Comments** to add a comment or access an existing comment thread for that plan.



Dependencies

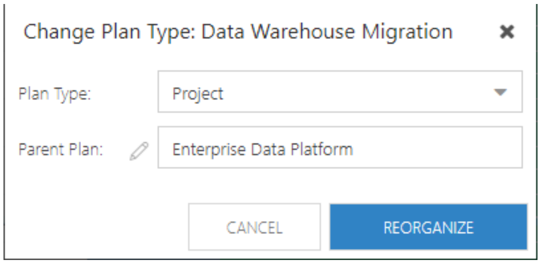
Click **Dependencies** to access the plan dependencies form. From this form, you can view and manage dependencies between your various plans.

See Portfolio Dependencies: Manage Dependencies Between Plans for instructions on how to manage these inter-plan dependencies.



Reorganize

Click **Reorganize** to reorganize the selected plan anywhere in your OnePlan group. Using the Reorganize function, you can change the plan type of the plan, and its place in your OnePlan hierarchy. The Reorganize function does not retail any historical information of the plan's previous type or location. It is simply a "lift-and-shift" function.



Plan Type Specific Modules

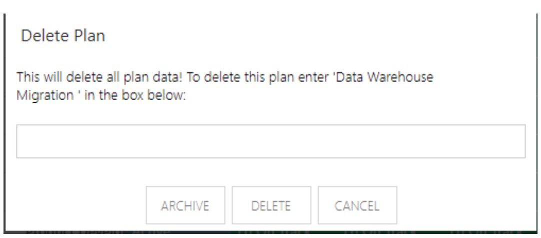
As mentioned earlier in this section, based on a plan's type and stage, certain features may or may not be available. Here we will explore those optional modules and how to use the Portfolio view to quickly access these modules for the selected plan.

- **Details**: Click Details to jump directly to the selected plan's Plan Details Form.
- **Financials**: Click Financials to jump directly to the selected plan's Financial Plan.
- **Resource Plan**: Click Resource Plan to jump directly to the selected plan's Resource Plan.
- **Work Plan**
  - **List**: Click List to jump directly to the selected plan's Work Plan List view.
  - **Board**: Click Board to jump directly to the selected plan's Work Plan Board view.
- **Reporting**
  - **Status Reports**: Click Status Reports to jump directly to the selected plan's Status Reports.
  - **Visualize**: Click Visualize to jump directly to the selected plan's Visualizer.
  - **Insights**: Click Insights to jump directly to the selected plan's Plan-Level Insights page.
  - **Dashboard**: Click Dashboard to jump directly to the selected plan's Power BI Reporting Dashboard.

Delete

Click **Delete** to access the Delete and Archive form. Here, you can either completely delete the selected plan (including all associated data), or archive the plan, which enables your administrator the ability to restore that plan at a later date.

See Delete or Archive a Plan for more information.


Delete Plan

This will delete all plan data! To delete this plan enter 'Data Warehouse Migration ' in the box below:

ARCHIVE DELETE CANCEL

Search for Plans in your Portfolio

This article explains how to use the **Find Plan** field to search for plans in your Portfolio.

IMPORTANT

The Portfolio-level search / Find Plan field is tied to the Advanced Portfolio Filtering functionality released in May 2024. To use the new Portfolio-level search, you need to have Advanced Portfolio Filtering enabled. See Enable Advanced Portfolio Filtering for instructions.

1. Enter part, or all, of your desired plan name into the **Find Plan** field.

   NOTE

   The search only works for plan names. It does not search other plan fields.

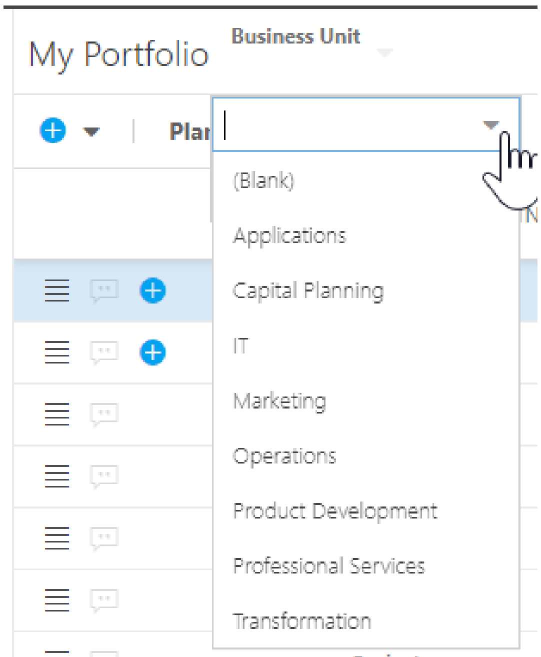
   

2. Click the magnifying glass icon, or press Enter on your keyboard to search. Plans that match your search will be displayed in a list for easy access.

Use the My Portfolio Pre-Filters

Pre-filters in OnePlan are server-side filters that reduce the amount of data loaded into the My Portfolio Area, designed to help improve performance (especially if the pre-filter is required). In the example here, the My Portfolio Area has a Business Unit pre-filter. So, a user would be able to only load in plans that belong to a selected Business Unit.



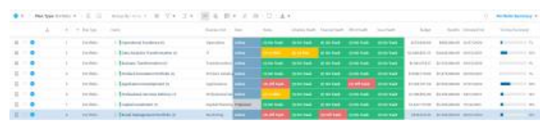
Prioritize Plans in the My Portfolio Area

This article explains how to use the Prioritize function in the My Portfolio Area.

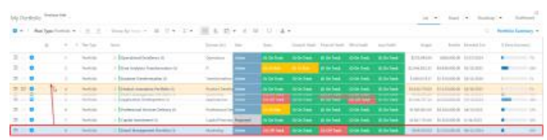
> **NOTE**
> You cannot use the Prioritize function when Grouping is on in the Portfolio.

Click **Widgets** in the Portfolio header, then select **Prioritize** to enable reordering of the plans in your Portfolio. The Prioritize function will allow you to drag and drop to reorganize the currently selected top-level plan types in the Portfolio.

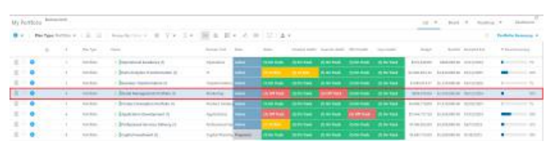
So, for example, you could reorder the Portfolios in your My Portfolio view in your desired order. Here, I want to reorder my list of Portfolios, and have the Brand Management Portfolio moved from the bottom of the list to just before the Capital Investment Portfolio. To do this, I will click the Prioritize icon, and you will see a # column appear in the view. This means the Prioritize function is active and I can rearrange my list.



Next, I will select the Brand Management Portfolio and drag it to the spot just before the Capital Investment Portfolio.



When I let go of my mouse, the Brand Management Portfolio is now located before the Capital Investment Portfolio. I can now turn off Prioritizing and continue managing my Portoflio as usual.



The Portfolio Prioritize function is a light version of what-if-ing. We recommend using the Modeler to do more robust prioritization and what-if-ing. See the Modeler section for more information on the Modeler.

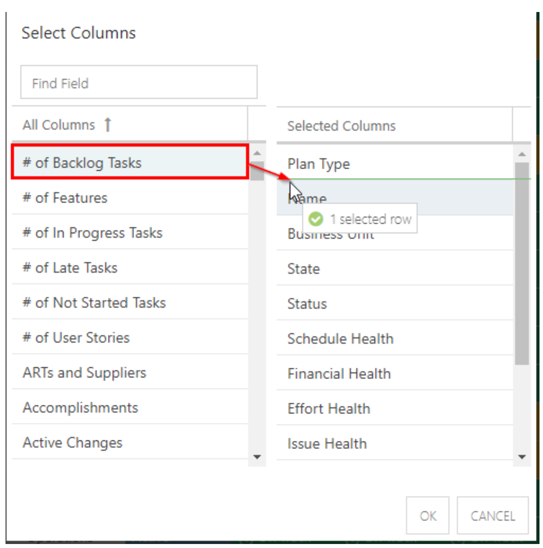
Add or Remove Columns in the My Portfolio Area

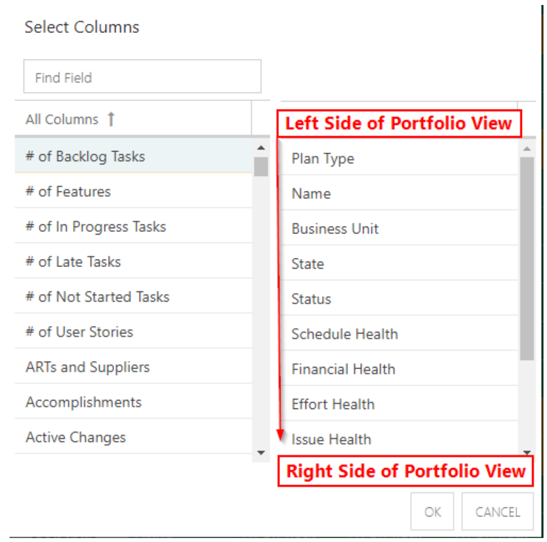
This article explains how to use the Columns interface to add and remove columns from your Portfolio List view.

Click the **Select Columns** icon to open the **Select Columns** form.

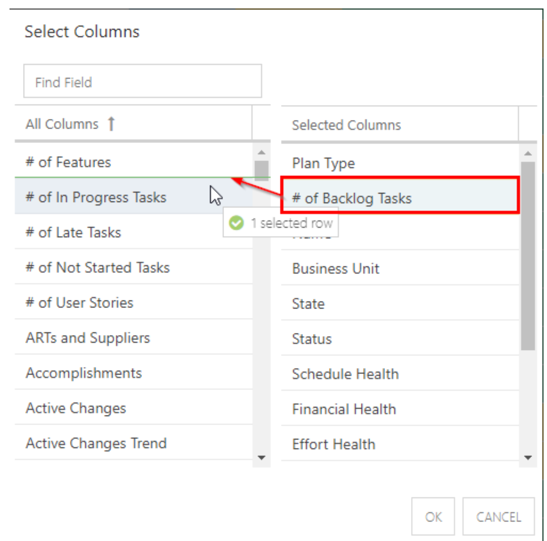
Here, you can select the columns you would like in your view and put them in the desired order. All available fields/columns are available on the left of the form, and all applied columns are on the right.

To add a column to the view, select a column from the left of the form (**All Columns**) and drag and drop it to the right side (**Selected Columns**). You can also set the order of the columns in your view from the **Select Columns** form. Columns on the top of the **Selected Columns** list will be on the left side of the portfolio view, and columns at the bottom of the list will be on the right of the view. Drag and drop columns in the **Selected Columns** list to rearrange. Then click **OK** to apply your changes.



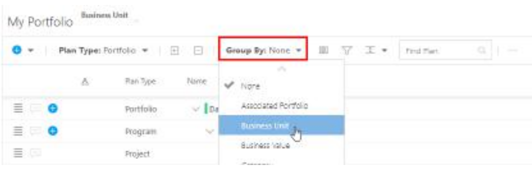


To remove a column from the view, select the column from the **Selected Columns** list, and drag and drop it into the **All Columns** list. Then click **OK** to apply your changes.

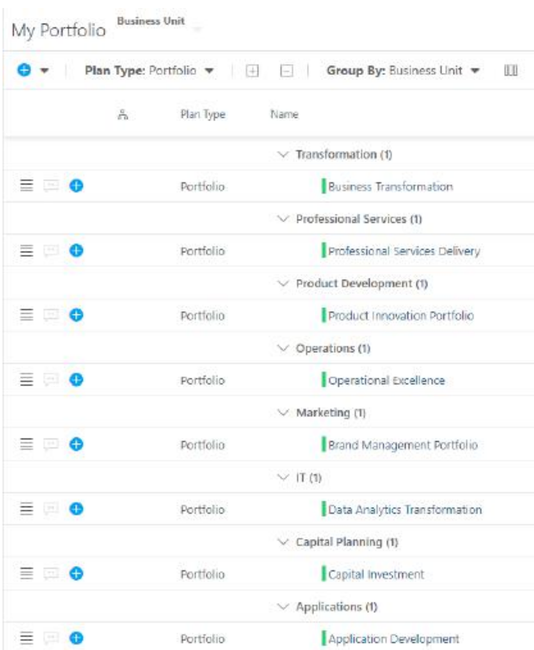


Group Plans in the Portfolio List

Click into the **Group By** menu to select a field to group the plans by in the Portfolio grid.



Here is an example of the Portfolio list grouped by Business Unit.



Filter your Portfolio

This article explains how to use the advanced Portfolio filtering interface to build and apply filters to your Portfolio.

IMPORTANT

To use the filtering interface detailed in this article, your OnePlan administrator needs to enable the advanced Portfolio filtering features. See Enable Advanced Portfolio Filtering for instructions.

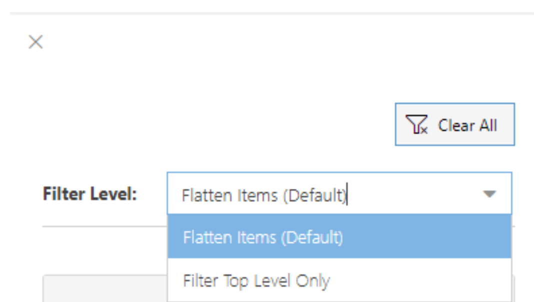
NOTE

This article does not cover how to use Legacy Filters.

Add New Filters

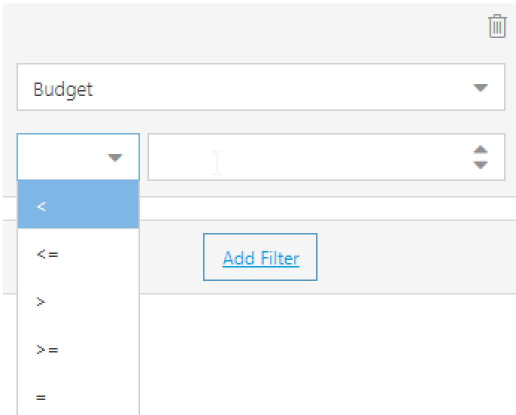
1. Click on the **Filters** icon in the Portfolio header. The filter interface will open on the right side of your window.

2. Select the **Filter Level**. Options include:
   - **Flatten Items** (Default): This setting allows you to filter on all plan-type hierarchy levels and displays the results in a flat list view
   - **Filter Top Level Only**: This setting allows you to filter on the top plan type level selected and displays the results in a hierarchy. Lower-level plans are NOT filtered. Only top-level plans are filtered.



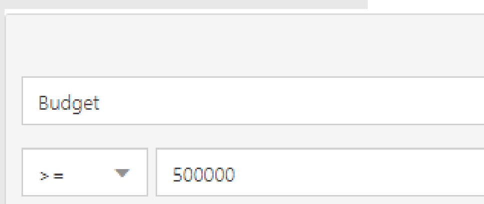
3. Select a plan field to filter on.
4. Set up the filter parameters. The filter parameter fields in the filter configuration will be generated dynamically based on the field type of the plan field you selected.
   - **Number and Currency fields**: If you are filtering on a Number or Currency field, you need to select whether you want the resulting plans to have that field value less than (<), less than or equal to (<=), greater

than (>), greater than or equal to (>=), or equal to (=) the set value. Then enter in the value you want to filter your plans on.

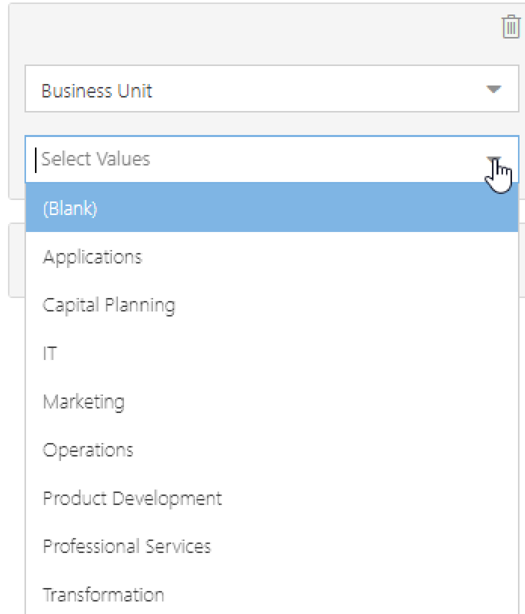


NOTE

For example, I could set up a filter to view plans that all have a Budget greater than or equal to $500,000. That filter would look like this:

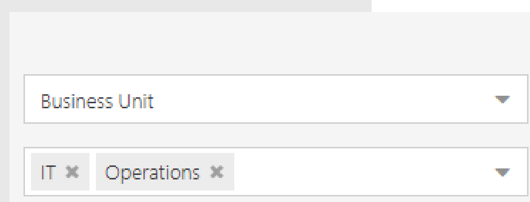


- **Choice and Multi-Choice fields**: If you are filtering on a Choice or Multi-Choice field, select the choice value(s) you want to filter your plans on.

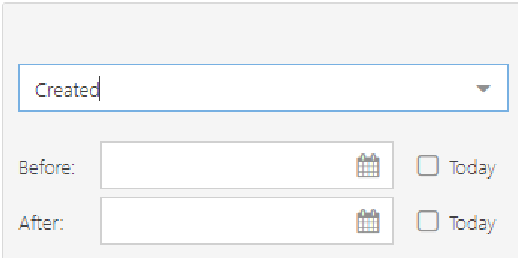


NOTE

For example, I could set up a filter to view plans that belong to the IT and Operations Business Units. That filter would look like this:

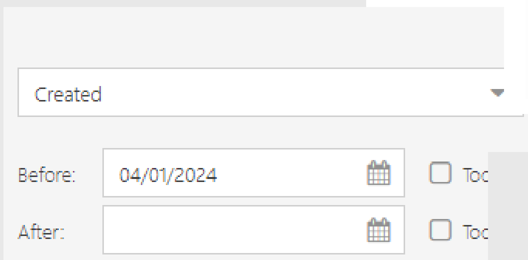


- **Date fields**: If you are filtering on a Date field, select the date range you would like to filter on. You can select whether you want to filter plans that have a date value before a set date or after a set date. You can also check the Today check box to filter plans either before or after the current date.

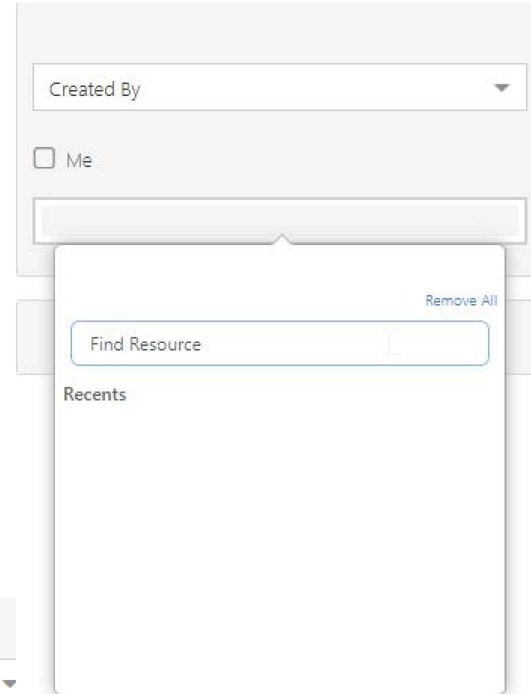


NOTE

For example, I could create a filter to view plans that were created before April 1, 2024. That filter would look like this:



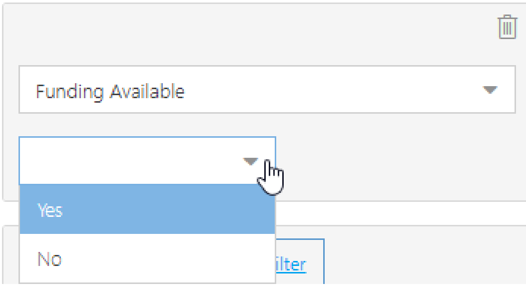
- **User fields**: If you are filtering on a User field, select the User you would like to filter on. You can also check the Me check box to filter for plans where you are the user for the selected field.



NOTE

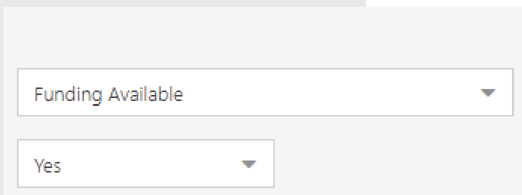
For example, I could set up a filter to view plans that were created by Erlich Bachman. That filter would look like this:

- **Yes/No fields**: If you are filtering on a Yes/No field, select whether you want to see plans where the selected field value is Yes or No.

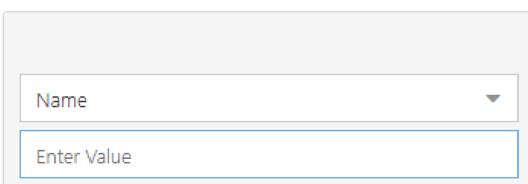


NOTE

For example, I could set up a filter to view plans where Funding Available equals Yes. That filter would look like this:



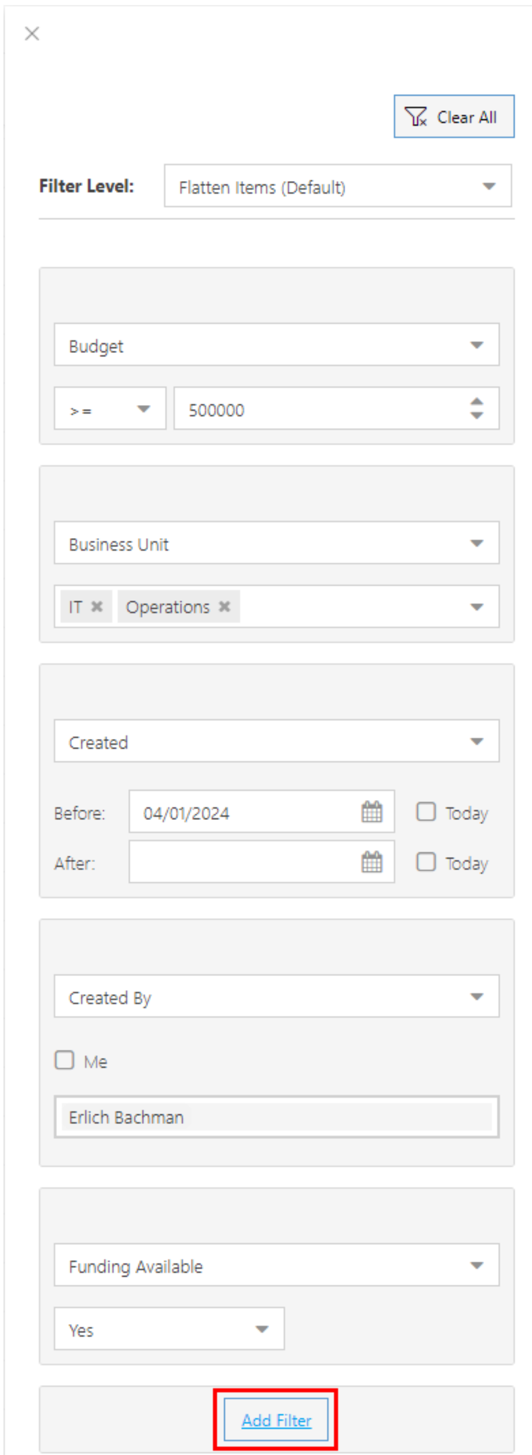
- **Text fields**: If you are filtering on a Text field, enter the text value you would like to filter on.



NOTE

For example, I could set up a filter to view plans that have Names including the word "improve". That filter would look like this:

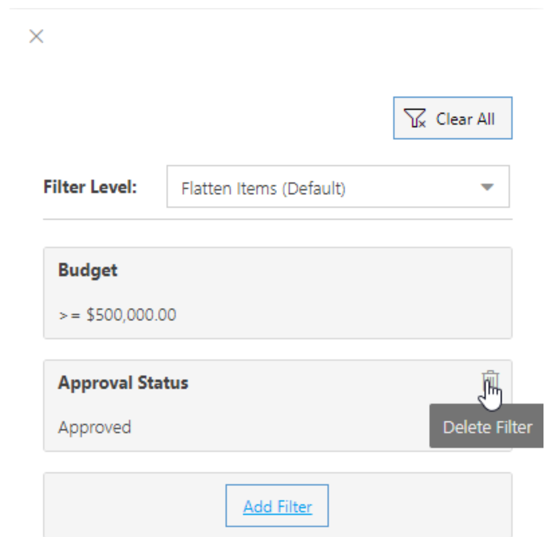
5. You can set up multiple filters. Click **Add Filter** to add another filter to the Portfolio.



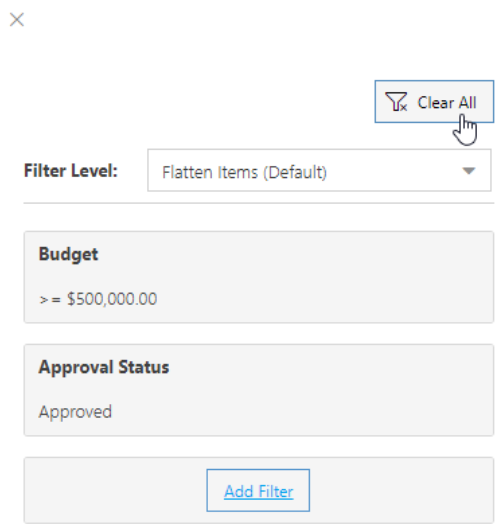
6. Once you have all the filters you want, click **Apply Filters** to apply your filters to the Portfolio view.

Remove Filters

To remove a single filter, click the **Delete** icon next to the desired filter.

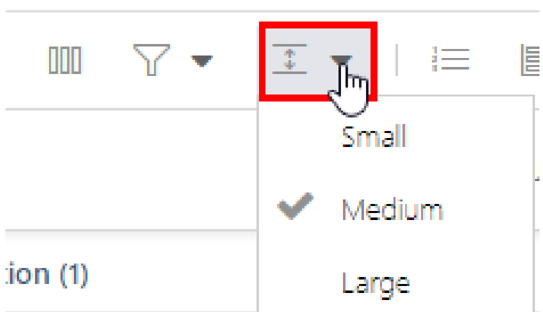


To remove all filters, click **Clear All**.



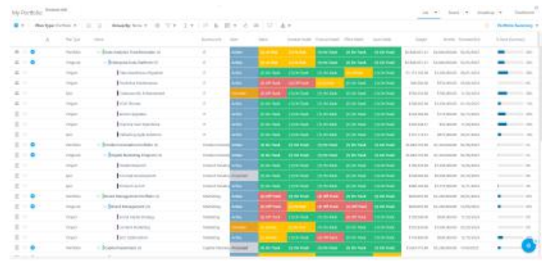
Set the Row Height in the My Portfolio Area

Click the **Row Height** icon to select the height of the rows in the Portfolio grid. Options include **Small**, **Medium**, and **Large**.

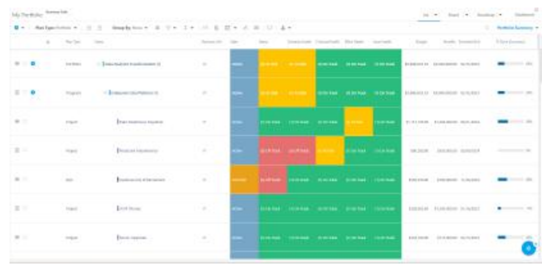


Small rows look like this:

Medium rows look like this:



Large rows look like this:

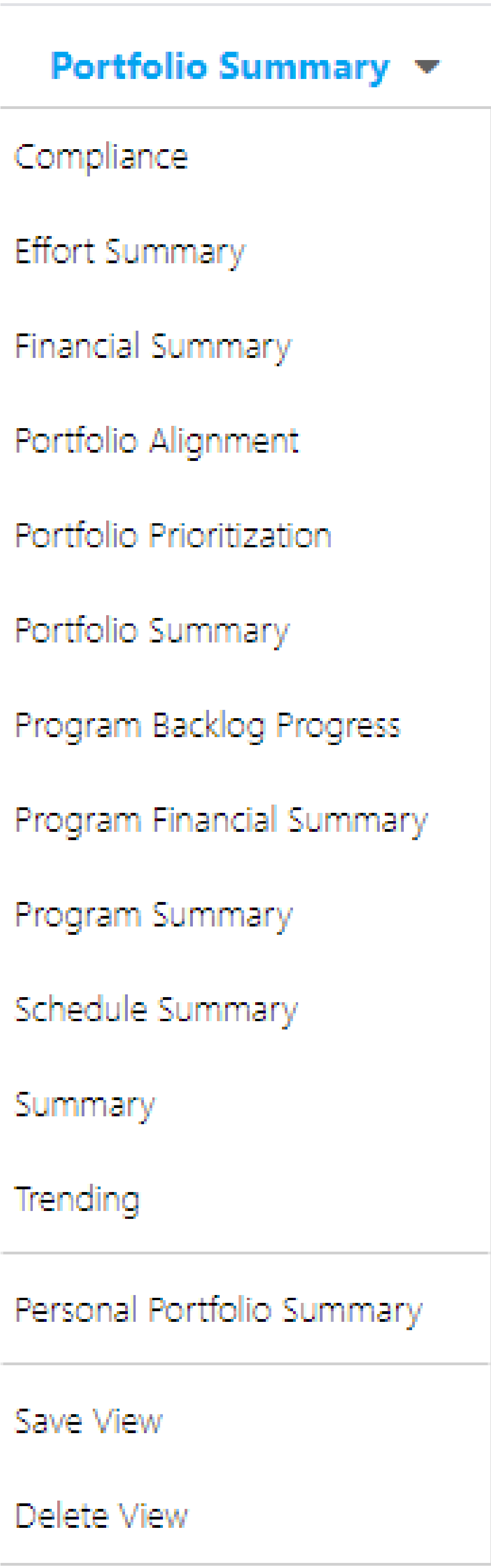


Save, Use, and Manage Views in the My Portfolio Area

This article explains what Views are in the My Portfolio area, as well as how to Save, Use, and Delete Views.

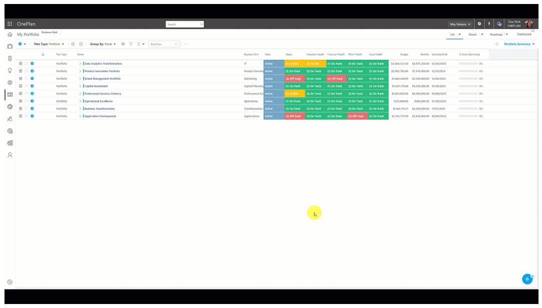
Views in OnePlan retain any filters, groupings, and columns you have applied to the Portfolio at the time you saved the **View**.

Select the **View** menu drop-down to change views, save views, and delete views. Global views are shown in the first section. Only administrators can save global views. Personal views are shown in the second section if you have any saved.



Select and Change Views

Changing Views in the Portfolio is simple. Click on the Views menu, and select the desired View from the drop-down.



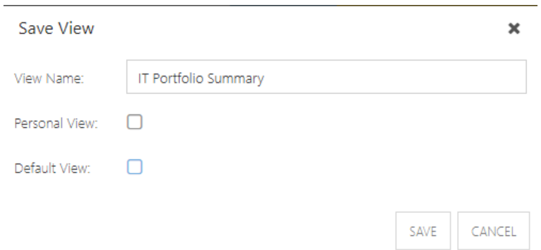
Save a View

1. Click on the **Views** menu, then select **Save View**. The **Save View** form will open.

2. Give your new View a name.
3. If you are an Administrator, select if this View is a **Personal View**. If the check box is left unchecked, the View will be global and available for all users.

> **NOTE**
> If you do not have Administrator/Owner permissions to your OnePlan group, the Personal View option will NOT be available. All views that you save will be personal by default.

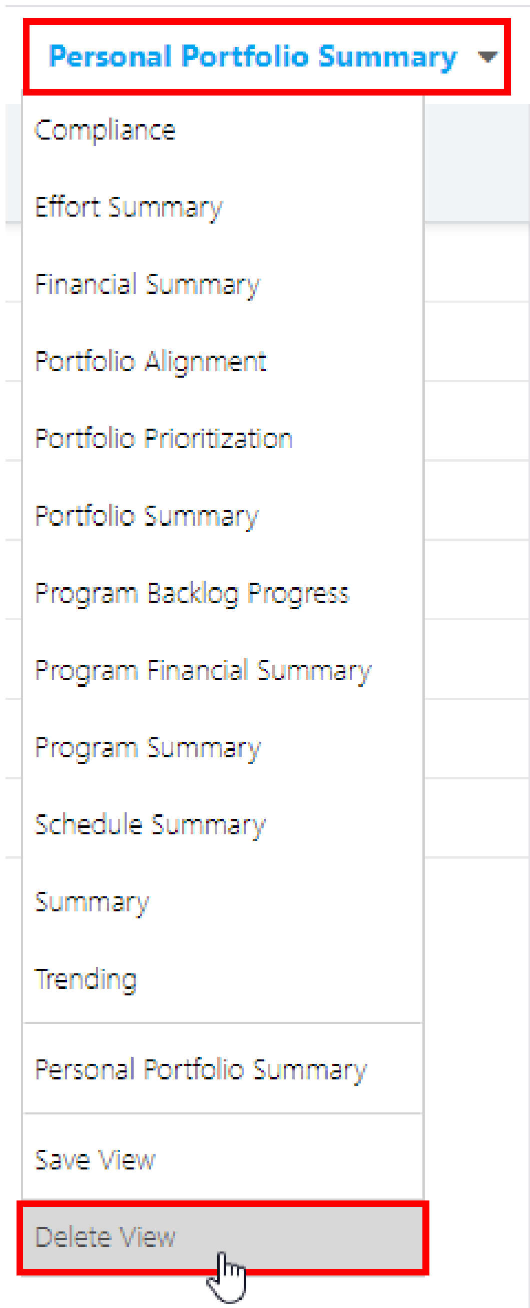
4. Check the **Default** check box if you want the new View to become the View that loads when you first access the Portfolio.



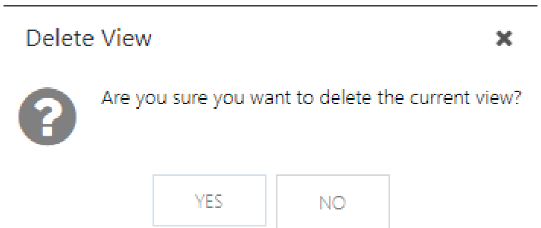
5. Click **Save**. Your new View is now available in the Views menu.

Delete a View

1. Select the View you would like to delete from the **Views** menu.
2. Once the View loads into the Portfolio, click the **View** menu, then select **Delete View**.



3. Confirm that you would like to delete the current View. Now the View will no longer be available from the **Views** menu.

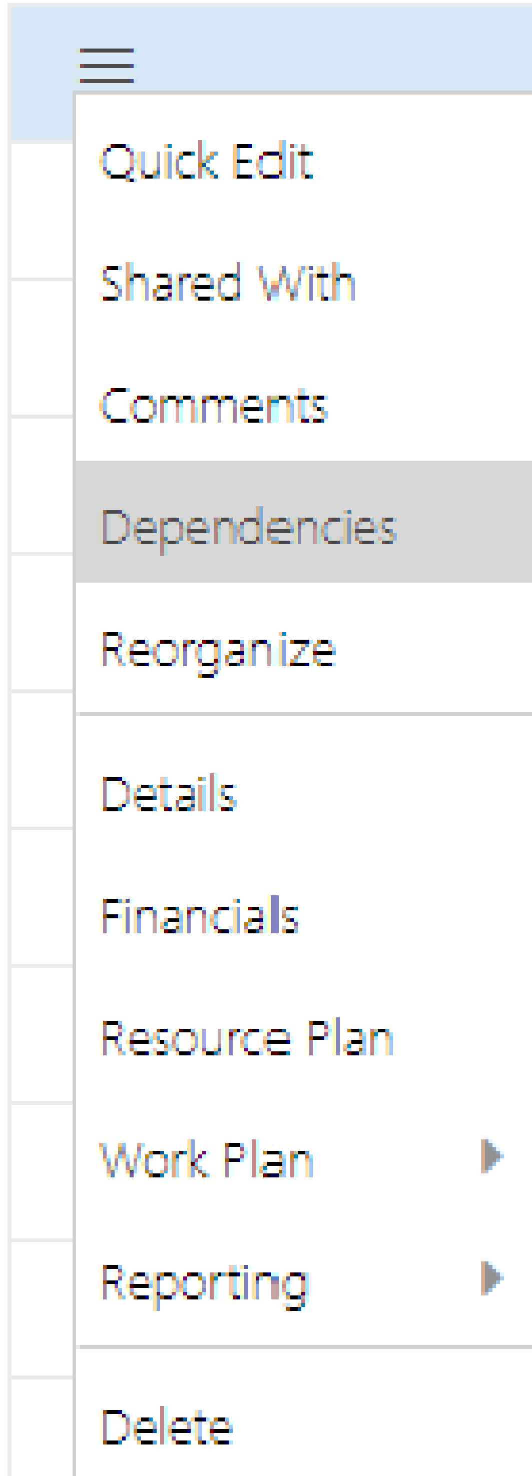


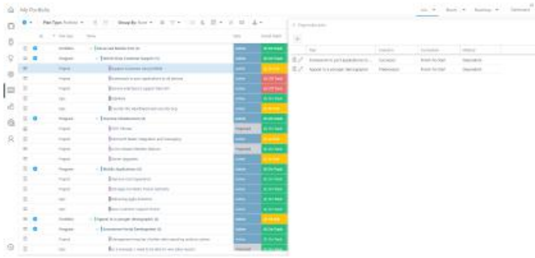
Portfolio Dependencies: Manage Dependencies Between Plans

This article explains how to build and view dependencies between plans in your portfolio. This is a visual link flag that shows on the Portfolios page, with the Gantt chart showing. The plans themselves do not get their dates shifted nor other details changed.

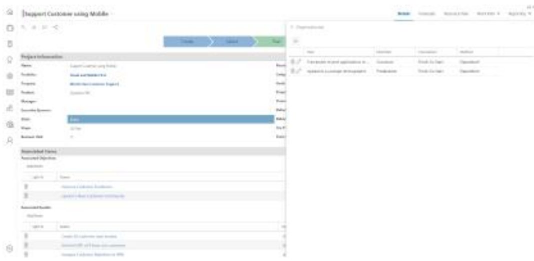
Open Dependencies

From the Portfolios area, click the contextual menu for the desired plan. Then select **Dependencies**. The **Dependencies** popup will open. You can then view and edit dependencies directly from popup.



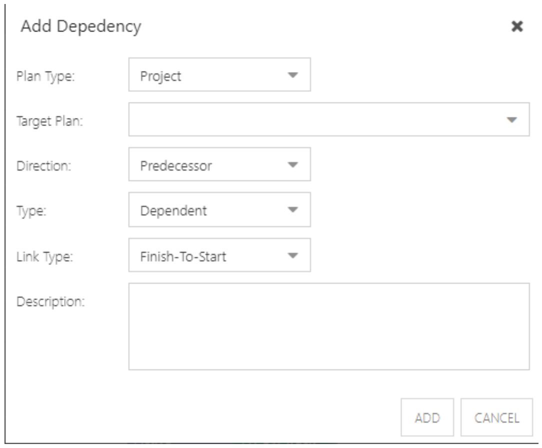


You can also access dependencies from the plan details form. Click the **Dependencies** icon to open the **Dependencies** popup. You can then view and edit dependencies directly from popup.



Add Dependency

1. Click the **Add Dependency** button to create a new depency/link between plans. The **Add Dependency** form will open.
2. Complete the **Add Dependency** form.
   - **Plan Type**: Select the plan type of the plan you would like to add as a dependency.
   - **Target Plan**: Select the plan you would like to add as a dependency.
   - **Direction**: Select the direction of the relationship between the current plan and the new dependency.
   - **Type**: Select the type of dependency the new dependency will be.
   - **Link Type**: Select the type of relationship will exist between the two plans.
   - **Description**: Enter a description for the new dependency.
3. Click **Add** to create the dependency.



Dependencies Show on Gantt Chart

Show the Gantt. The plans' gantt bars will have a line with an arrow to signify which plan is dependent on which, and the link type.

Use the Pivot Chart in the Portfolio Area

This article explains how to use the Pivot Chart in the My Portfolio Area.

Access the Pivot Chart

To access the Pivot Chart, click on the **Widgets** button in the Portfolio header, then select **Pivot Chart**. The Pivot Chart will open in the bottom half of your window.

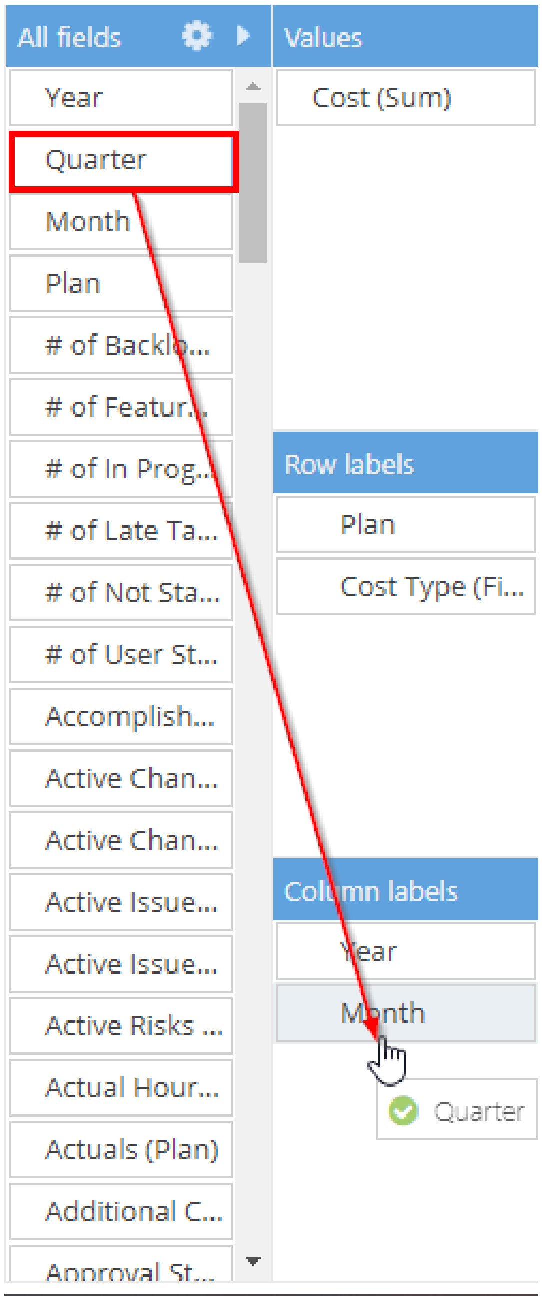
Select the Pivot Chart Row Labels, Column Labels, and Values

There are a couple of ways that you can add and remove fields and values from the Portfolio Pivot Chart. The Pivot Chart interface gives you the ability to customize the chart so you can analyze the Portfolio data that is most important to you.

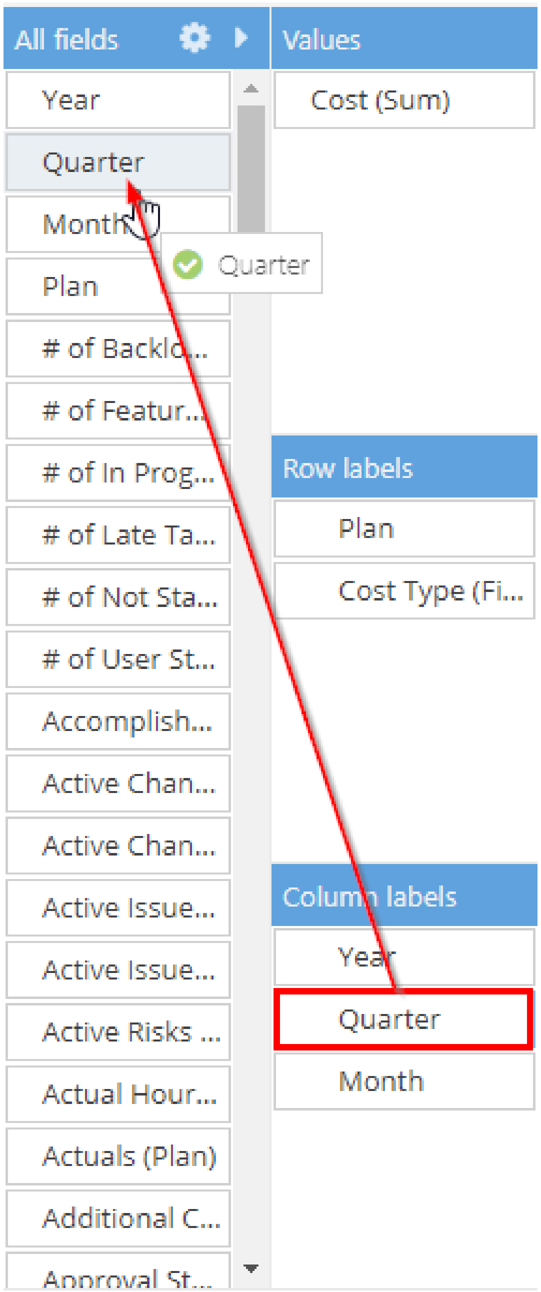
Drag and Drop Fields

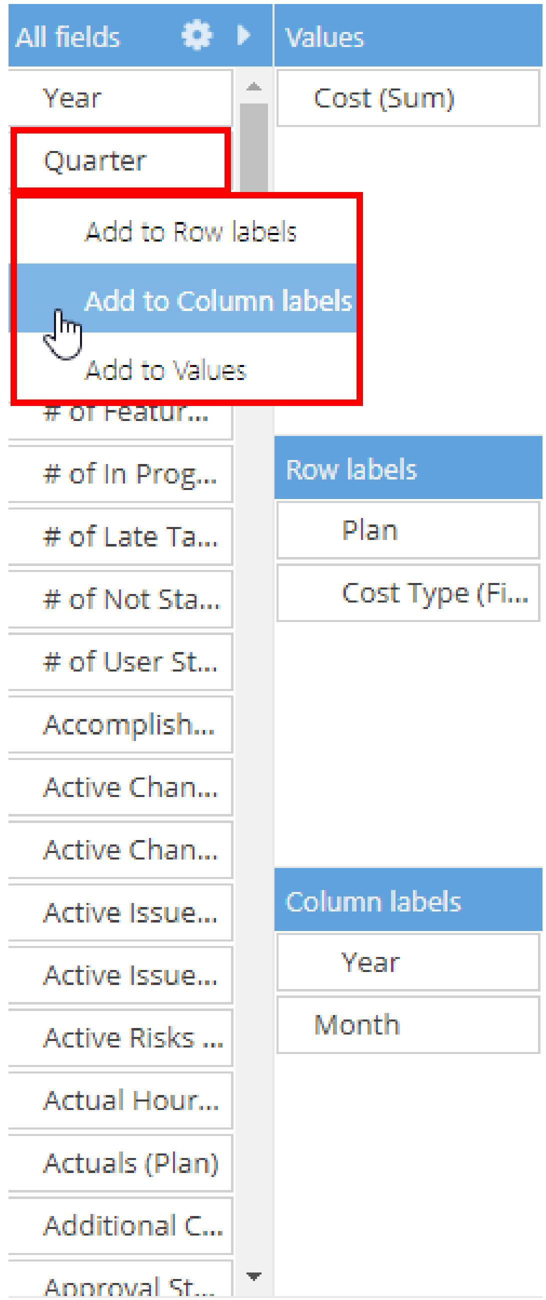
The first method for adding or removing fields or values from the Pivot Chart is to simply drag and drop the fields.

To add a field to the Pivot Chart, select the field from the **All Fields** section, then drag to the desired location - either **Values**, **Row Labels**, or **Column Labels** - and drop the field. The Pivot Table will automatically update with the added field.



To remove a field from the Pivot Chart, select the field from either the **Values**, **Row Labels**, or **Column Labels** section, then drag and drop it into the **All Fields** section. The Pivot Chart will automatically update with the field removed.



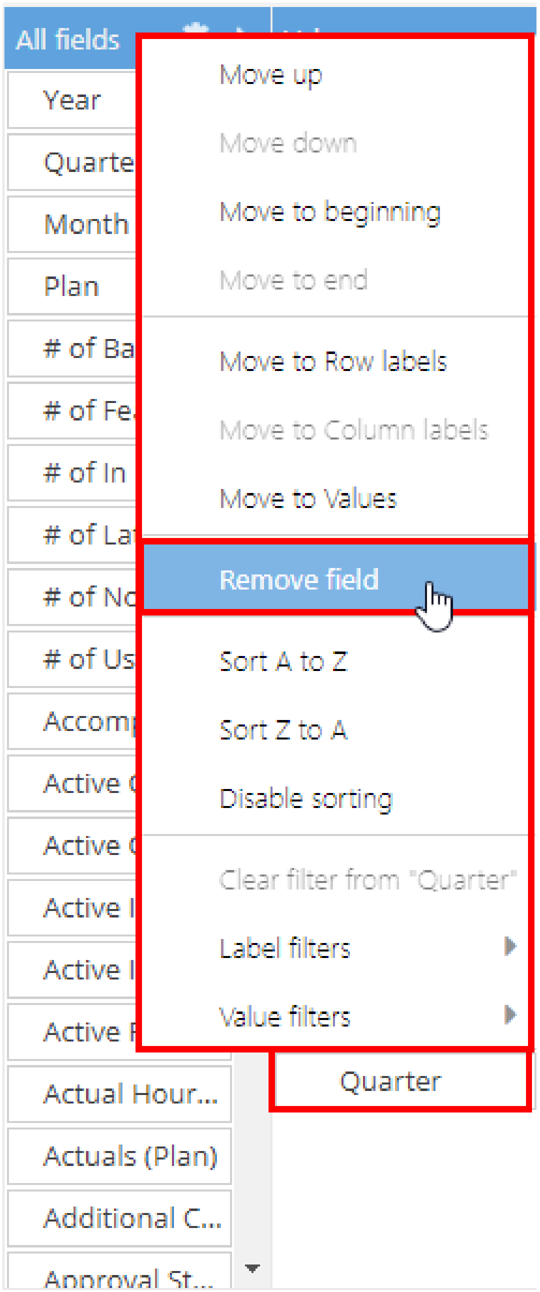


Use the Field Menu

The second method to add or remove fields or values from the Pivot Chart is to use the Fields Menu.

To add a field, click on the desired field from the **All Fields** section, then select where you would like to add the field from the menu. The Pivot Table will automatically update with the added field.

To remove a field, click on the desired field from the **Values**, **Row Labels**, or **Column Labels** sections, then select **Remove Field**. The Pivot Chart will automatically update with the field removed.



Using the Field Menu, you can also rearrange the field order, relocate the field to a different area of the Pivot Chart, sort the field values, and apply filters to the field values.

Configure the Pivot Chart Settings

You can use the Pivot Chart settings to configure the appearance and layout of your Pivot Chart.

1. Click on the settings gear in the **All Fields** header. The **Settings** form will open.

2. Select a Layout. Options include:
   - Outline

   - Compact (default)

   - Tabular

3. Select the Row subtotal position. Options include:
   - First

   - Hide

   - Last

4. Select the Column subtotal position. Options include:
   - First

   - Hide

   - Last

5. Select the Row total position. Options include:
   - First

   - Hide

   - Last

6. Select the Column total position. Options include:
   - First

   - Hide

   - Last

7. Select whether to Show zero as blank or not. Options include:
   - Yes
   - No
8. Click **OK** to apply your changes to the Pivot Chart.

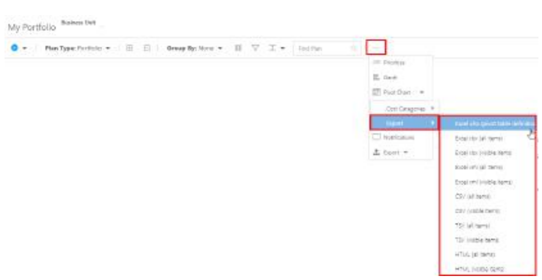
Export the Pivot Chart

OnePlan allows you to export the Portfolio Pivot Chart to many different formats, including:

- Excel xlsx (pivot table definition)
- Excel xlsx (all items)
- Excel xlsx (visible items)
- Excel xml (all items)
- Excel xml (visible items)
- CSV (all items)
- CSV (visible items)
- TSV (all items)
- TSV (visible items)
- HTML (all items)
- HTML (visible items)

To export your Pivot Chart:

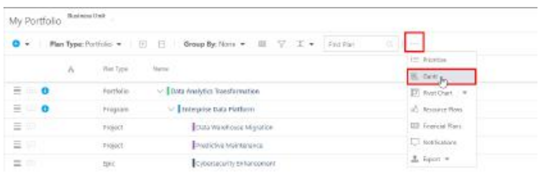
1. Click on the **Widgets** icon in the Portfolio header, then select **Pivot Chart** > **Export**, and select the format you would like to export to.
2. The file will be saved to your Downloads folder.



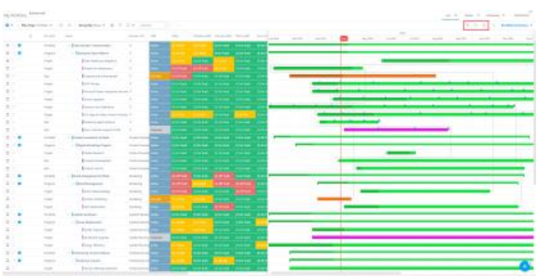
Use the Gantt in the Portfolio Area

This article explains how to access and analyze the Portfolio Gantt.

To access the Gantt click on the **Widgets** button in the Portfolio header, then select **Gantt**. The Gantt will open in the right half of your window.



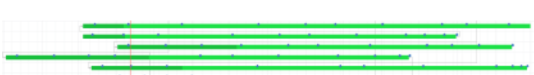
When the Gantt chart is open, additional icons will show for Gantt view controls including Zoom In, Zoom Out, and Zoom Fit.



Looking at the Gantt, there are a few items to note:

- Each bar represents a plan in the Portfolio. The bars' coloring is determined by logic set up by your OnePlan administrator. The length of the bars correlates to the duration of the plan.

- Milestone events are represented by diamonds on the Gantt bars.



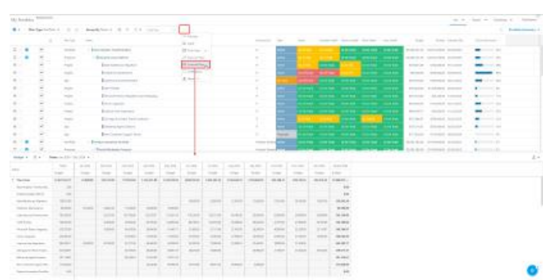
- Relationships between plans are represented by a gray line connecting two plan bars.

- Hovering your cursor over the bars, diamonds, and dependency lines will bring up a tooltip, giving you some general information on the plan, milestone, or relationship.

Use the Financial Plans Panel in the My Portfolio Area

This article explains how to access and use the Portfolio Financial Plans panel.

To access the Resource Plans panel, click on the **Widgets** button in the Portfolio header, then select Resource Plans. The Gantt will open in the right half of your window. A read-only view of a Global Resource Plan in the bottom half of the screen.



You have control over the plans that are included in the Financial Plans panel. When you open the panel, a new column is added to the Portfolio list filled with check boxes. Plans with the check box checked are included in the Financial Plans panel. Plans with the check box unchecked will not be included.

Use the Resource Plans Panel in the My Portfolio Area

To access the Resource Plans panel, click on the **Widgets** button in the Portfolio header, then select Resource Plans. The Gantt will open in the right half of your window. A read-only view of a Global Resource Plan in the bottom half of the screen.

A read-only view of the Global Resource Plan in the bottom half of the screen. The Gantt chart will also open.

You have control over the plans that are included in the Resource Plans panel. When you open the panel, a new column is added to the Portfolio list filled with checkboxes. Plans with the check box checked are included in the Resource Plans panel. Plans with the check box unchecked will not be included.

Modeler

Portfolio Modeler Overview

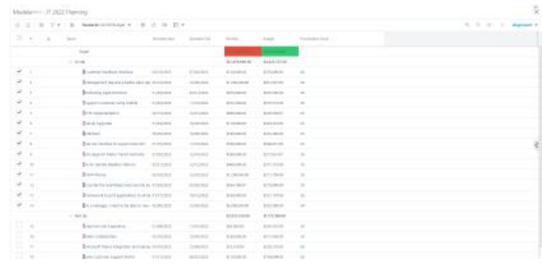
This article provides an introduction to the OnePlan Modeler app.

To enable it, your administrator will need to install the "Modeler" app.

https://player.vimeo.com/video/756500504

The new portfolio Modeler allows for advanced top down strategic portfolio planning. The Modeler allows you to:

- Create multiple models and scenarios to map out possible ways to meet your goals within set budgets. See Create a Model Scenario [131] and Create a Modeler Model [127].
- Organize multiple models into folders. See Create a Modeler Folder [126].
- You can then compare scenarios to find the optimal plan. See Analyze Model Scenarios [132].
- Multiple people can create their own models using the plans and constraints they pick. Each model can contain one or more what if scenarios. You can then share the models with other people to view and collaborate. See Create a Model Scenario [131] and Create a Modeler Model [127].
- Analyze your various scenarios using OnePlan's powerful project management and visualization tools. See Portfolio Modeler Resource Plan [134], Portfolio Modeler Financial Plan [135], Portfolio Modeler Visualizer [132], Portfolio Modeler Bubble Chart [133], and Additional Modeler View Options [139].

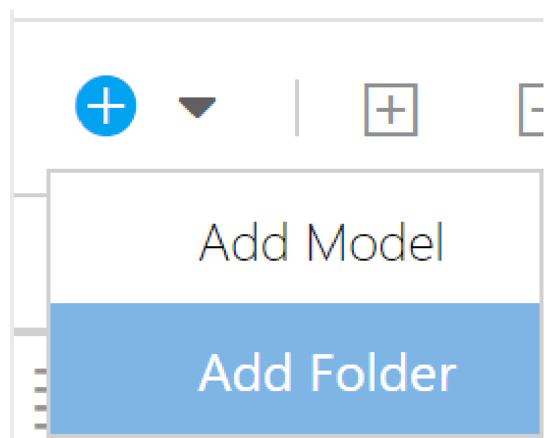


Create a Modeler Folder

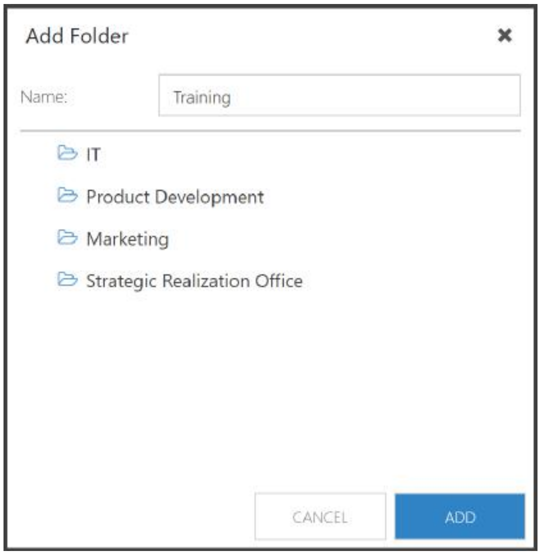
This article explains how to create a folder in the Modeler app to group and organize your various models.

To create a new folder:

1. Select **New Item** > **Add Folder**. The **Add Folder** form will open.



2. Enter a name for your new folder. Then click **Add**. The new folder is now available.

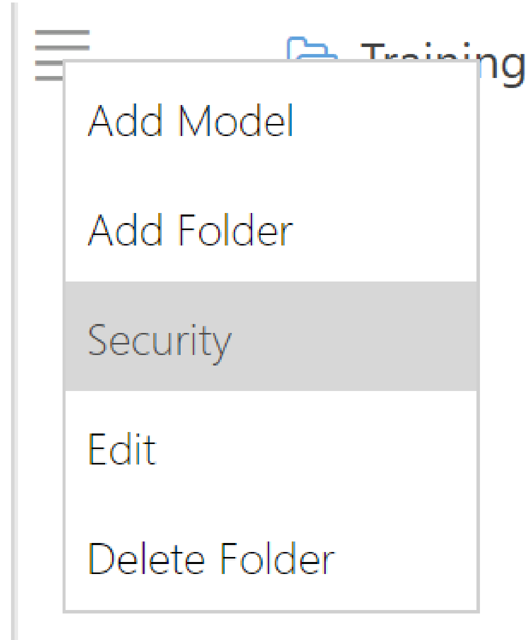


Folder Security

You can share Modeler folders with others on your team for easy collaboration. To update a folder's securtiy:

1. Click the hamburger menu next to the desired folder. Then select **Security**. The **Shared With** form will open.

> **NOTE**
> The Shared With form displays all of the people who the folder is currently shared with.



2. To share the folder with another user, start typing their name into the **Add User** field. Then select the user from the search results.

3. To remove a user from the folder, click the **Delete** icon next to their name.

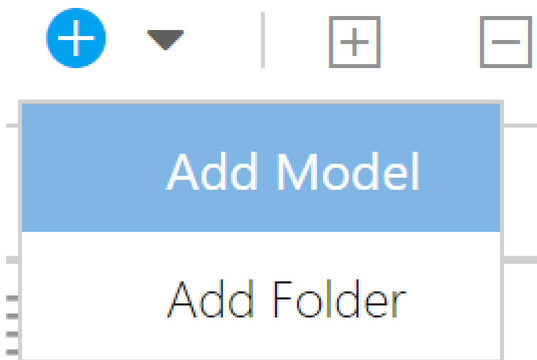
Create a Modeler Model

This article explains how to create a Modeler model.

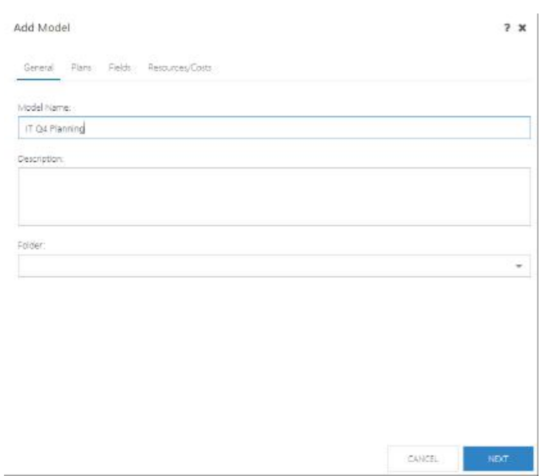
Create a New Model

To create a new model:

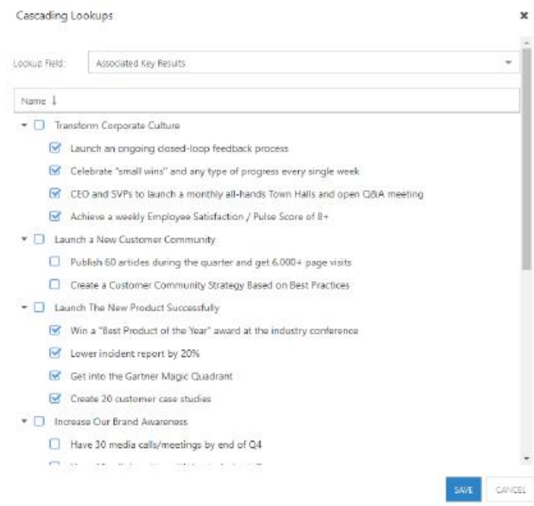
1. Select **New Item** > **Add Model**. The **Add Model** form will open.



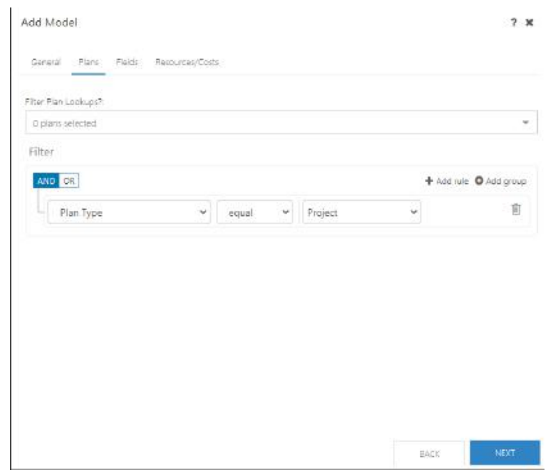
2. Complete the **Add Model** form.
   - **General** Tab
     - **Name**: Enter a name for your model.
     - **Description**: Enter a description for your model.
     - **Folder**: Select the folder where you would like this model to be stored.



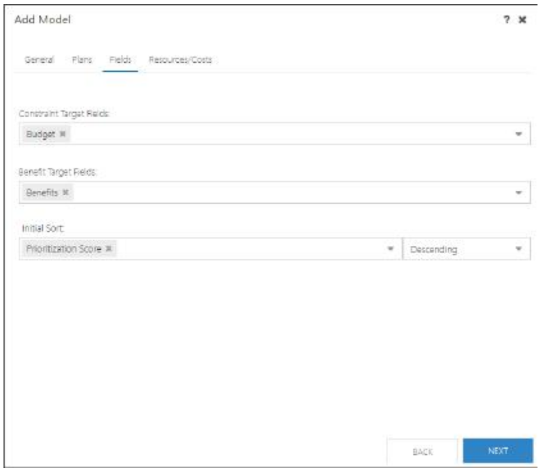
   - **Plans** Tab
     - **Filter Plan Lookups?**: Select a lookup field to filter on related plans. In this example, I am filtering on Associated Key Results, so I am bringing in plans associated to particular key results.



     - **Filter**: Create an apply filters to refine the items that are brought into your model. In this example I applied filters so I am only bringing Projects into my model.

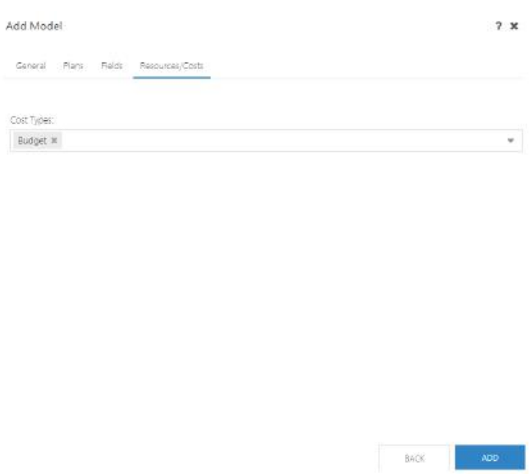


   - **Fields** Tab
     - **Constraint Target Fields**: Select the target field(s) where you want the scenario rollup values to be less than the selected target for your model. In this example I chose the plan-level field **Budget**.
     - **Benefit Target Fields**: Select the target field(s) where you want the scenario rollup values to be greater than the selected target for your model. In this example I chose the plan-level field **Benefits**.
     - **Initial Sort**: Select which field to sort the items in your model by. In this example I chose the plan-level field **Prioritization Score** as my sort by field.

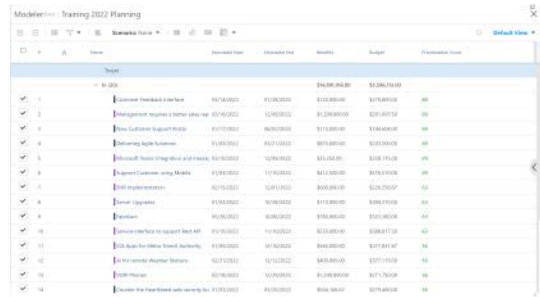


- **Resources/Costs** Tab
  - **Cost Types**: Select the cost types you would like to load in for the financial and resource data in this model.

> **NOTE**
>
> If you do not select a resource plan or financial plan cost type, then the resource plan and/or financial plan options will not show in the model.



3. Click **Add** to create the model. The model is now available for analysis. See Create a Model Scenario [131] and Analyze Model Scenarios [132] for more information.



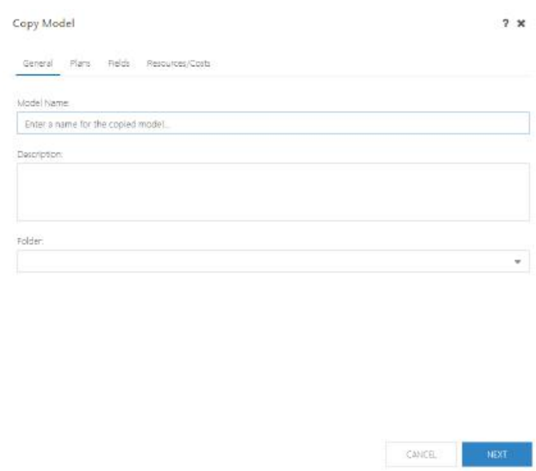
Copy a Model

You can also copy existing models to use as a base for a new model.

To copy a model:

1. Click the hamburger menu next to the model you want to copy. Then select **Copy Model**. The Copy Model form will open.

2. Enter a name for your new copied model. This is required, and you cannot progress without giving your copied model a name.



3. Review the model settings by clicking **Next** to move through the **Copy Model** form.
4. If you are happy with the model settings, click **Copy**. A copy of the model will be created.

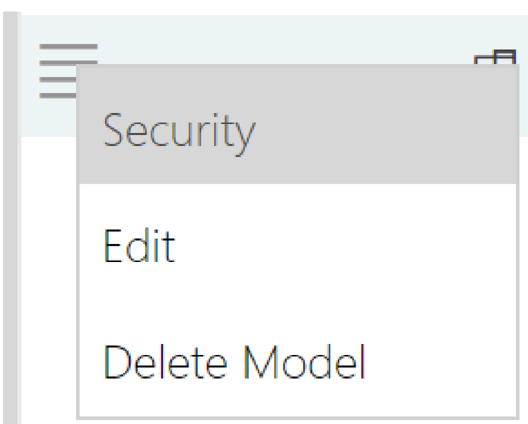
Model Security

Multiple people can create their own models using the plans and constraints they pick. Each model can contain one or more what if scenarios. You can then share the models with other people to view and collaborate.

1. Click the hamburger menu next to the desired model. Then select **Security**. The **Shared With** form will open.

> **NOTE**
>
> The Shared With form displays all of the users that the model is currently shared with.

> **NOTE**
>
> Users who are in the parent folder Shared With will have access to all models within that folder.



2. To share the model with another user, start typing their name into the **Add User** field. Then select the user from the search results.

> **NOTE**
>
> You are only sharing the selected model with the user. They will not have access to other models in the folder unless you give them access to each individual model, or share the folder with them. See Create a Modeler Folder [126] for more information.

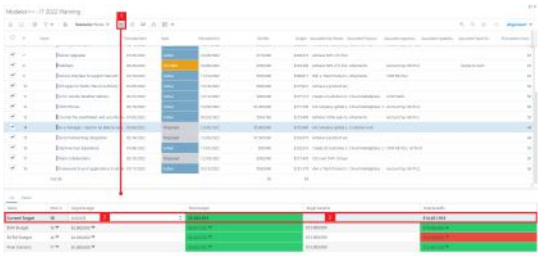
3. To remove a user from the folder, click the **Delete** icon next to their name.

> **NOTE**
>
> You can only remove users who were added to Shared With at the model level. Otherwise you will need to edit the folder security settings. See Create a Modeler Folder [126] for more information.

Create a Model Scenario

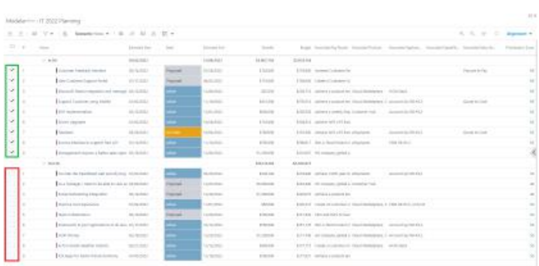
This article explains how to create a scenario in a Modeler model.

1. Open the **Analyze** panel.
2. Enter your target cost and benefit values in the **Current Target** row for the. These fields are then color coded based on which items are "In" or "Out" in the list below.



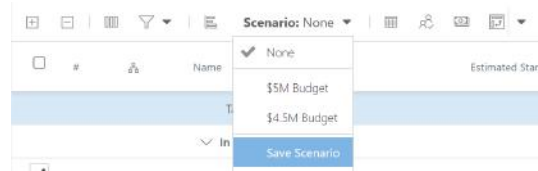
- The cost field will be green if the rolled up costs of the "In" items is less than the set target cost value. It will become red if the rolled up costs become greater than the target.
- The benefit field will be green if the rolled up benefits of the "In" items is greater than the set target benefits value. It will become red if the rolled up benefits become less than the target.

3. Check the checkbox next to an item to mark it as "In" for the scenario. Items that are "In" are included in the roll up calculation for the cost and benefits.
4. Uncheck the checkbox next to an item to mark it as "Out" for the scenario. Items that are "Out" are not included in the roll up calculation for the cost and benefits.

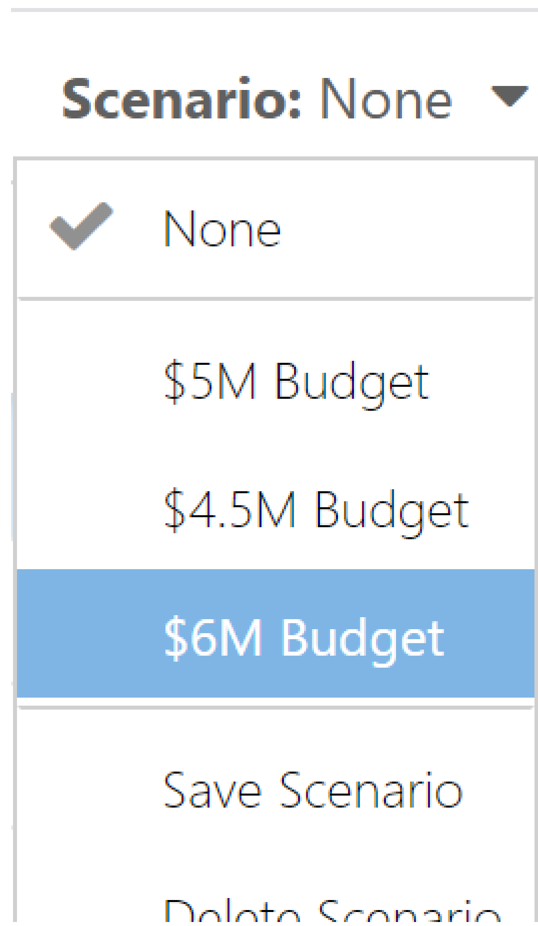


5. Once you are happy with the target values, and the items that are "In" and "Out", save the scenario. To save a scenario:

a. Click the **Scenario** menu in the header. Then select **Save Scenario**. The **Save Scenario** form will open.



b. Enter a name for the new scenario. Then click **Save** to save the new scenario. This scenario will now be available in the **Scenario** menu, and in the **Analyze** panel (see Analyze Model Scenarios [132] for more information).



IMPORTANT

If you update a scenario (drag and drop, or update in or out), and try to navigate away from the model before saving, you will be prompted to save before leaving.

Analyze Model Scenarios

This article explains how to use the Analyze function of the Modeler.

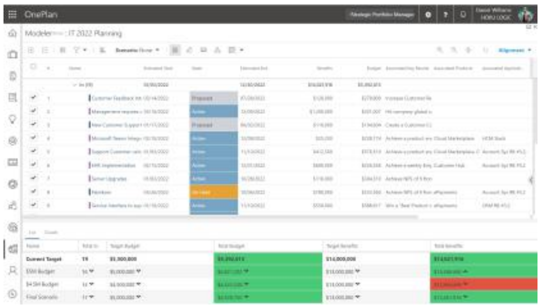
Once you have created a few scenarios in your model that you are happy with (see Create a Model Scenario [131]), you can compare scenarios to find the optimal plan.

To compare the scenarios in your model, click **Analyze** . The **Analyze** panel will open at the bottom of the screen.

NOTE

The cumulative comparison charts will update in real time as you move plans in / out or drag and drop to a different estimated start date.

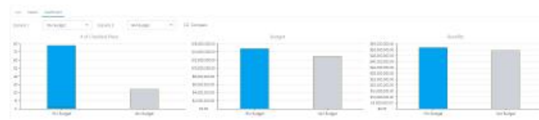
The **List** view shows a side-by-side comparison of the Cost and Benefits for all of the scenarios in your model, making it easy to compare and select the scenarios that best meet your needs.



The **Details** view allows you to select two scenarios from your model to compare the selected plans in the different scenarios. This way, you can easily see which plans are most important to your team, and need to be taken on regardless of the scenario.

The **Dashboard** view allows you to select two scenarios from your model and shows you three bar chart comparisons:

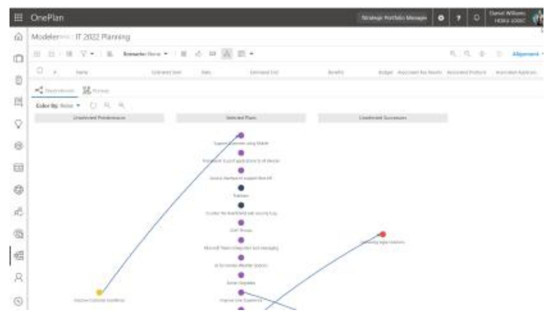
- # of Checked Plans
- The selected Less Than Field (configured by the Model creator) (**Budget** in this example)
- The selected Greater Than field (configured by the Model creator) (**Benefits** in this example)



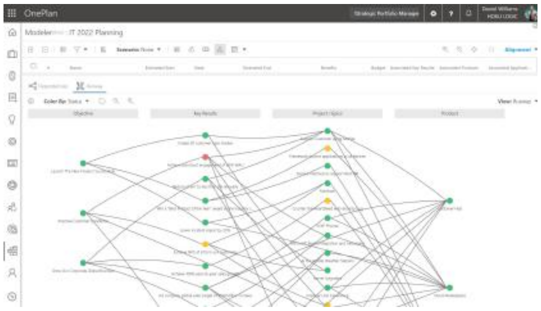
Portfolio Modeler Visualizer

The visualizer is available from within the modeler. See the Visualizer Overview article for more information on using the OnePlan Visualizer.

From the **Dependencies** view, you can visualize dependencies a across plans in your model.



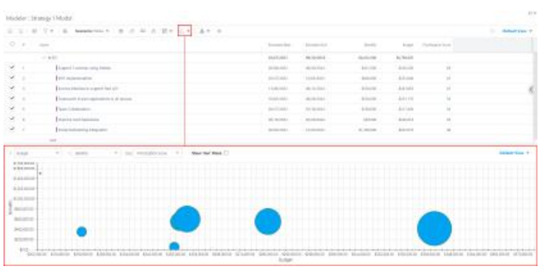
From the **Runway** view, you can visualize Portfolio Runways across plans in your model.



Portfolio Modeler Bubble Chart

This article explains how to access and use the Modeler strategic bubble chart.

Click on the **Charts** icon to open the drop down. Then select **Bubble Chart**. The chart will open in the bottom half of the screen.



When you first open the Bubble Chart, it will be blank. You need to set up the X and Y axis, and the bubble size values. Follow the instructions in Set Up the Chart [133].

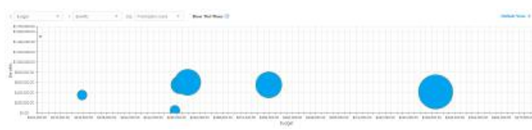
Set Up the Chart

The Portfolio Modeler Bubble Chart lets you select fields you want for each axis of the chart to easily visualize and compare your plans across your portfolio.

To set up the bubble chart, select fields for the X and Y axis, and the bubble size from the drop downs at the top of the chart. You can also select to include plans that are "out" in the model. By default, the bubble chart only displays plans that are marked as "in" in the model.

In this example, I have selected the following values:

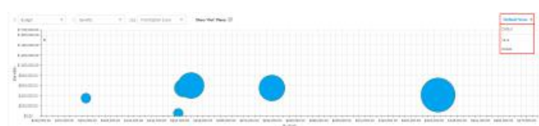
- **X Axis**: Budget
- **Y Axis**: Benefits
- **Bubble Size**: Prioritization Score
- **Show "Out" Plans**: Yes



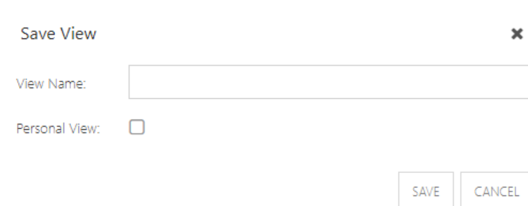
Save the Chart View

To save the chart configuration:

1. Select the **View** drop down, then click **Save**. The **Save View** form will open.



2. Complete the **Save View** form:
   - **Name**: Enter a name for your view.
   - **Personal View**: Check the checkbox to save the view as a personal view for your use only.
3. Click **Save**.



Portfolio Modeler Resource Plan

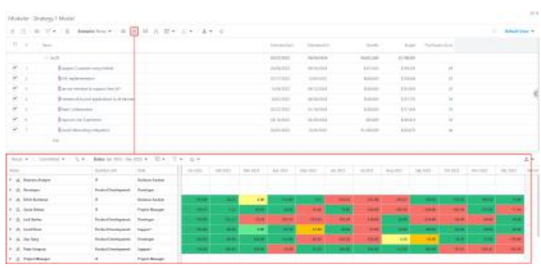
This article explains how to access and use the Resource Plan from within the Portfolio Modeler.

The Resource Plan is available from within the Portfolio Modeler to view your resource availability while creating your optimal scenarios.

NOTE

If you do not select a resource plan cost type when creating the model, then the resource plan options will not show in the model.

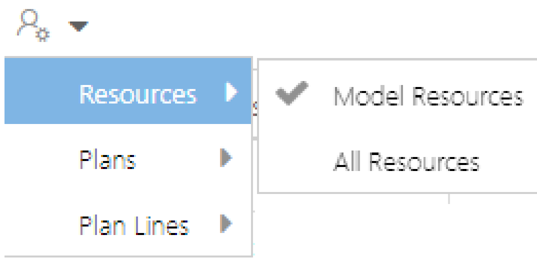
Click on the **Resource Plan** icon to open the Resource Plan pane in the bottom half of the screen.



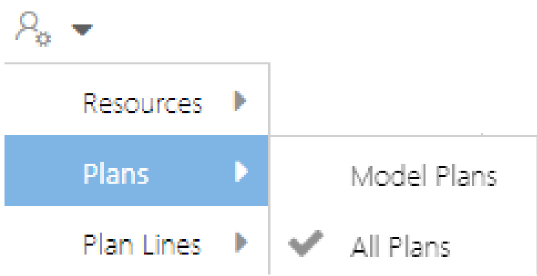
Data Selection

When loading the modeler, only resources used in the 'in" plans will be shown by default. You can use the options in the Data Selection model to load in desired resources.

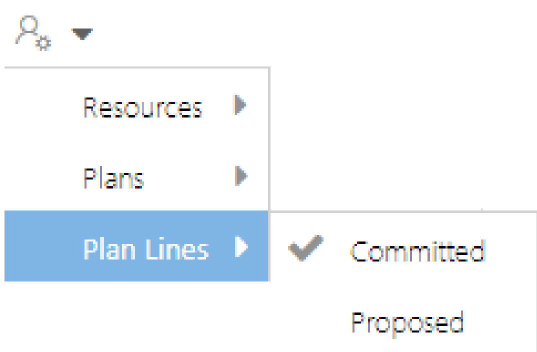
You can use the data selection option to show all resources if needed.



You can also choose to show all plans, or just the "in" plans data.



You can also filter on the status of each resource booking (proposed vs committed).



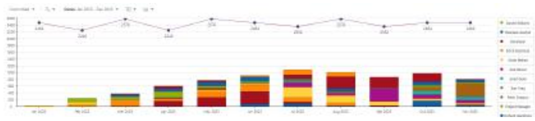
Charts

You can use the resource capacity vs demand chart to better visualize availability.

Click the **Charts** icon to open the drop down. Then select the chart you would like to view. Options include:

- **List**: Opens the default resource plan grid view.

- **Capacity vs Demand**: Opens a stacked bar chart showing resource capacity against demand over a selected time period.



> **NOTE**
> The resource capacity vs demand chart will update in real time as you move plans in / out or drag and drop to a different estimated start date.

Export the Resource Plan

You can export the resource plan grid data to excel (XLSX or CSV).

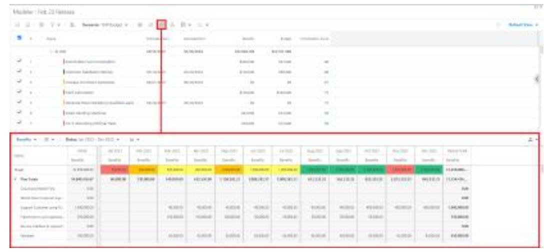
Click on the **Export** icon to open the drop down. Then select the format you would like to export the resource plan to.

Portfolio Modeler Financial Plan

This article explains how to use the Financial Plan view in the Portfolio Modeler.

> **NOTE**
> If you do not select a financial plan cost type when creating the model, then the financial plan options will not show in the model.

Click the **Financial Plan** icon to view the financial plans for all items in your model to further analyze financials while creating various scenarios.



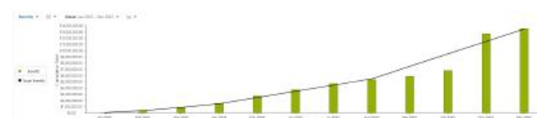
Charts

You can view cumulative financial graphs from within the modeler. This makes it easier to visualize cost issues.

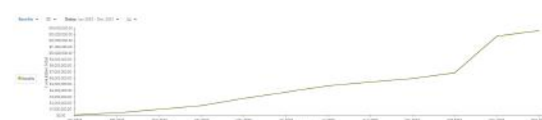
Click the **Charts** icon to open the drop down. Then select the chart you would like to view. Options include:

- **List**: Opens the default financial plan grid view.

- **Cumulative Costs vs. Target**: Opens a line and bar chart comparing cumulative costs to target benefits or actuals (depending on the cost type selected in the List view) over a selected time period.



- **Cumulative Comparison**: Opens a line chart showing cumulative benefits or actuals (depending on the cost type selected in the List view) over a selected time period.



Portfolio Modeler Kanban Board

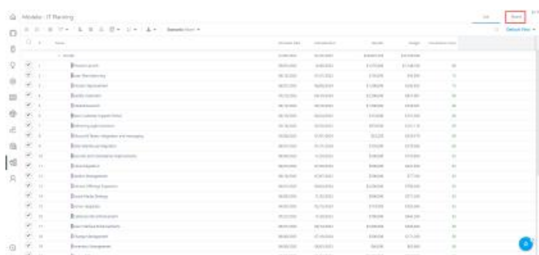
This article explains the features and functionality of the OnePlan Portfolio Modeler Kanban Board.

OnePlan Portfolio Modeler Board is a visual tool used to create various "what-if" scenarios of plans within a portfolio. The board includes a series of columns and/or lanes that represent the different stages or phases of the plan lifecycle, and it can be used to display information about each plan, such as the plan name, owner, status, budget and more.

When using the Kanban in the modeler, all the changes made are "what-if" changes that do not affect plan data. This could be used to organize plans into different lanes and columns (for example program increments, releases, quarters, etc.). When you do this, you can add constraints to each column to model how you could organize your plans while staying within your selected constraint (for example points, hours, or budget).

Access the Modeler Kanban Board

To access the Kanban board, simply select the Board tab in the upper right corner of the Model window. Once in the Board view, you can either create a new board scenario (see Create a Board Scenario [136] for instructions), or select a previously saved board scenario (see Open a Saved Board Scenario [138] for instructions).

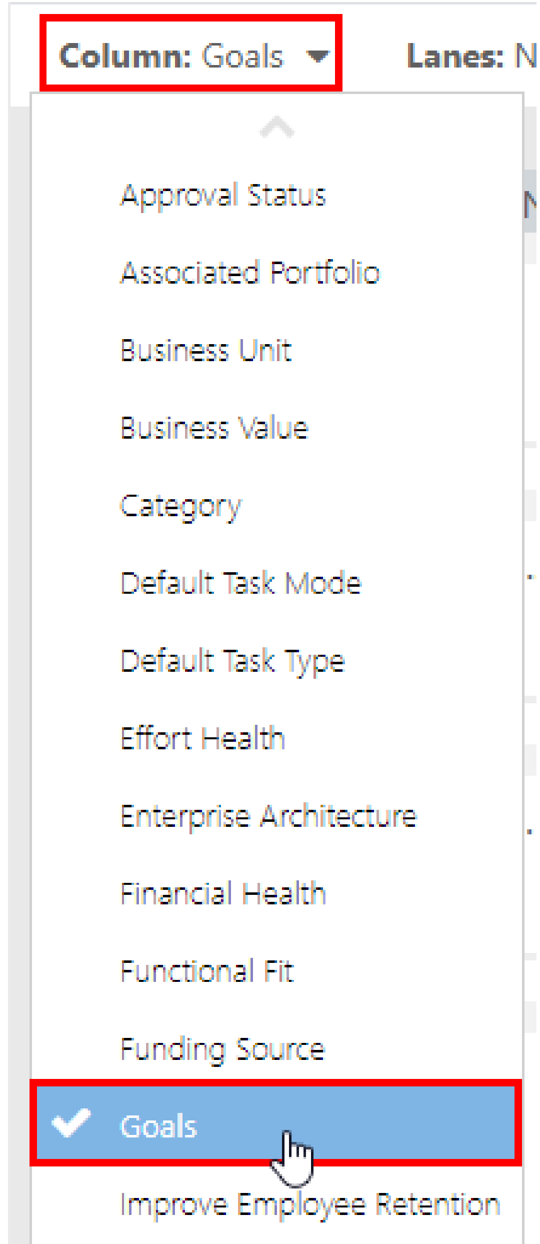


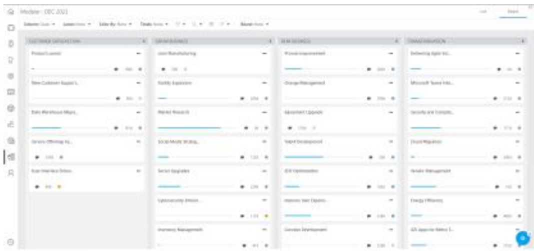
Create a Board Scenario

The first time you load the Kanban, the plans will be ordered based on the priority set in the list view. Only plans marked as "in" will be shown in the Kanban.

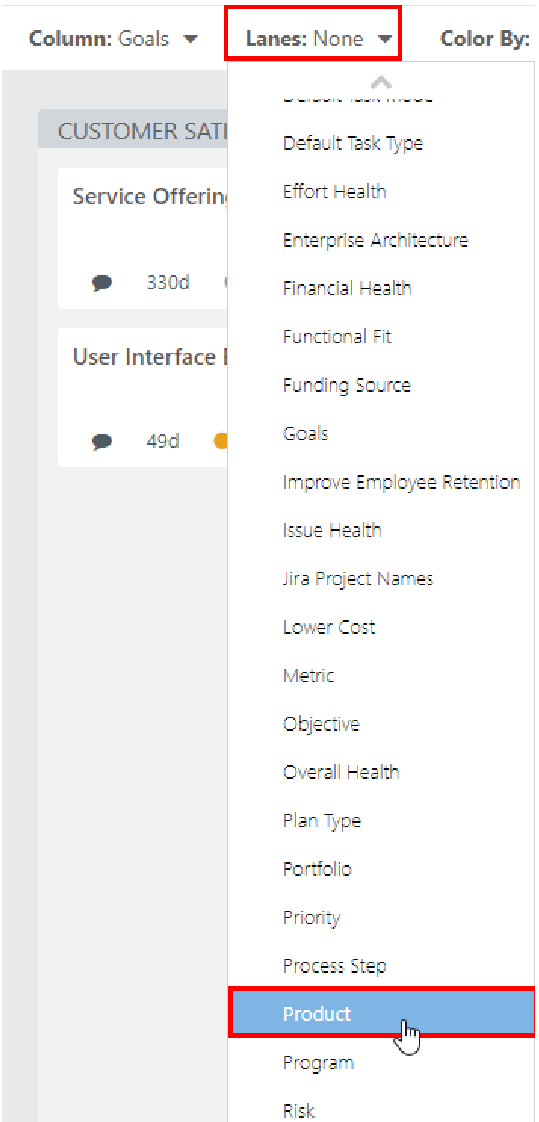
All of the board configuration settings are available here in the board header.

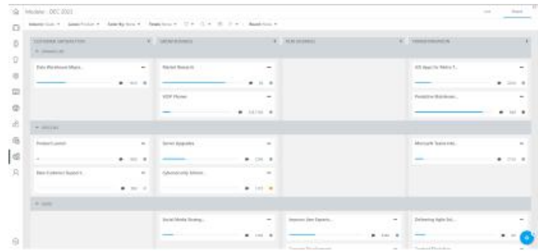
- **Column**: Select the plan field want to use for the columns in the board. For example, I will click on the **Column** menu, and select **Goals** from the drop-down. Now the **Goals** plan field will be used for the columns in the board.



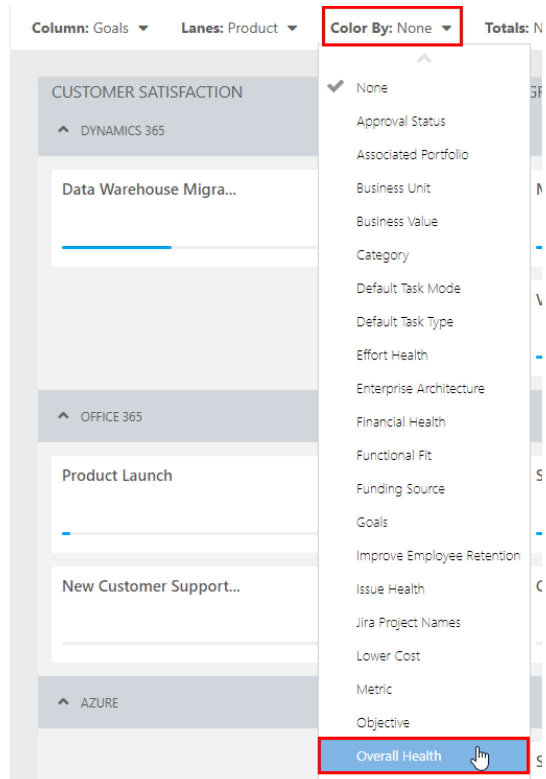


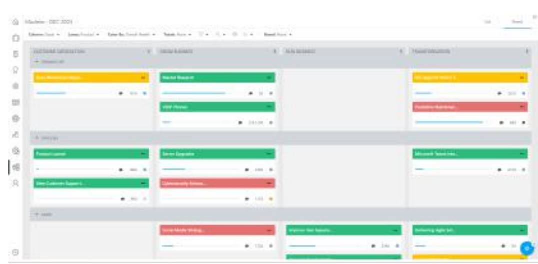
- **Lanes**: Select the plan field want to use for the lanes in the board. For example, I will click on the **Lanes** menu, and select **Product** from the drop-down. Now the board will have swim lanes to group the cards by the **Product** they belong to.





- **Color By**: Select the plan field want to use to color-code the cards on the board. For example, I will click on the **Color By** menu, and select **Overall Health**. Now the cards on the board will be color-coded by the project or epic **Overall Health**.





- **Totals**: Select the plan field want to use as the column totals. For example, I will click on the **Totals** menu, and select **Benefits** from the drop-down. Now the column total value is a sum of the **Benefits** values of all of the projects and epics in the column.

- **Filter** : Select plan fields to use as filters to limit the number of items that appear in the board. For example, I might set a filter on the Status field, and only load in projects and epics that have a Status of On Track.
- **Zoom** : Select the size of the cards on the board. Options here include Small, Medium, and Large. Large is the default size.
- **Constraints** : Set the constraint values for the columns in the board to run some light what-if scenarios. The constraints are based on the value you selected for the Totals. So, in the example I've been using throughout this article, the Totals, and thus the Constraints, are based on the Benefits values of the projects and epics in the board. To set constraints in the board:

    1. Click on the Constraints icon, the Edit [Selected Totals] Constraints form will open.
    2. Select the Constraint Goal. Options include None, Above Constraint, or Below Constraint. Because in this example I am working with Benefits as my Total values, I want to be above the constraint value I will set, as more benefits from projects and epics = more money for the organization. So, I will select Above Constraint.
    3. Set the constraint values for each column. Again, I am working with Benefits in this example. So for each column, I want to set the minimum benefits I want to see from all of the projects and epics in a column. To set these constraint values, click into the Constraint field for each column, and enter the desired value.

- **Fields** : Select the plan fields you would like displayed on the cards on the board. For this example, I will also add the Funding Available and Overall Health fields to the cards. To do this, click on the Fields icon, then select the desired fields (Funding Available and Overall Health) from the drop-down. The data from the selected fields will now be displayed on the cards on the board.

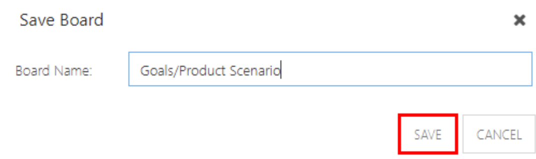
Save a Board Scenario

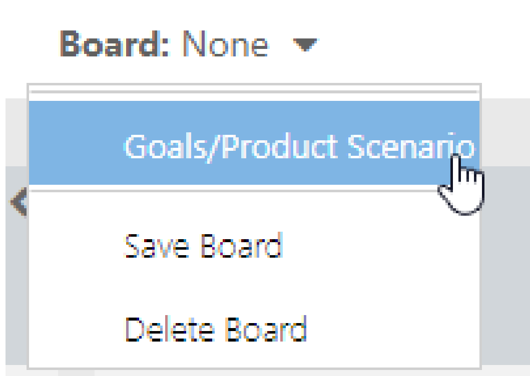
You can save Kanban board scenarios. The column, lane selected, and the order of the plan cards are saved in the scenario.

To save a Kanban board scenario:

1. Click the **Board** menu, and select **Save Board** from the drop-down menu. The **Save Board** form will open.

2. Enter a name for your board scenario in the **Board Name** field. Then click **Save** to save your board scenario. The new board scenario will now be available from the **Board** menu.

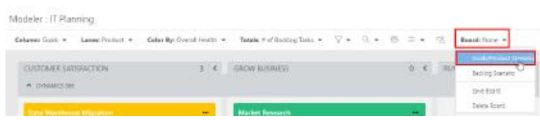


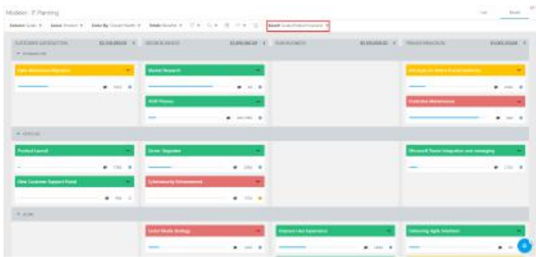


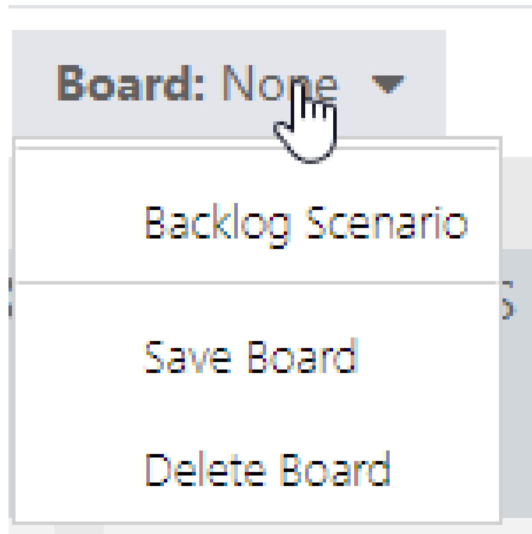
Open a Saved Board Scenario

To open a previously saved board scenario:

- Click the **Board** menu, and select the scenario you would like to open.





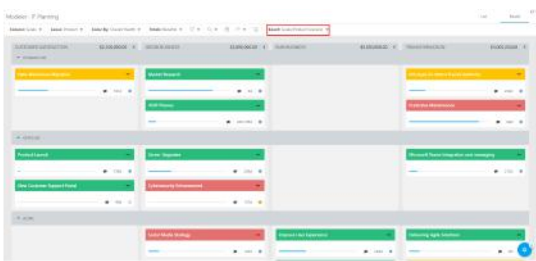


Delete a Board Scenario

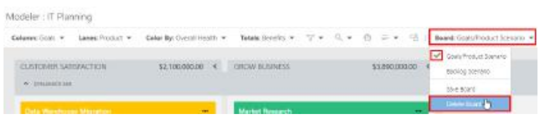
To delete a previously saved board scenario:

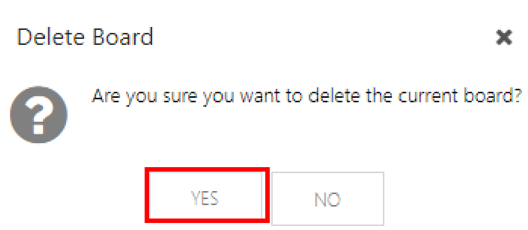
1. Click the **Board** menu, and select the scenario you would like to delete.

> **NOTE**
> You must open the board scenario to delete it.



2. Click the **Board** menu again, and select **Delete Board**. The Delete Board confirmation will open. Click Yes to delete the board scenario. When you return to the Board menu, the deleted scenario will no longer be available.





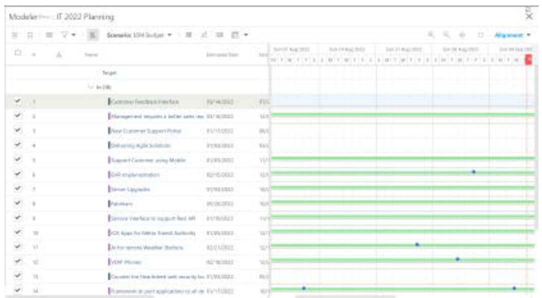
Additional Modeler View Options

This article explains the additional view options available in the Modeler to further analyze your models.

In addition to the compare scenario function (see Analyze Model Scenarios [132]), the Modeler has additional view options available to help you further analyze your models.

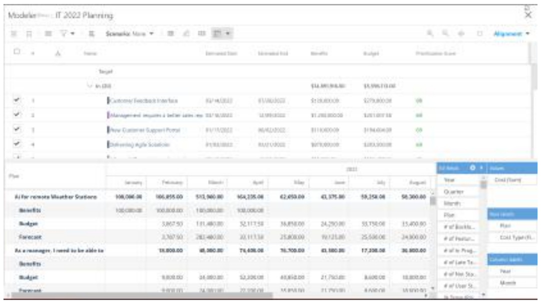
Gantt

The Gantt can be used to shift projects in the timeline to build your roadmap.



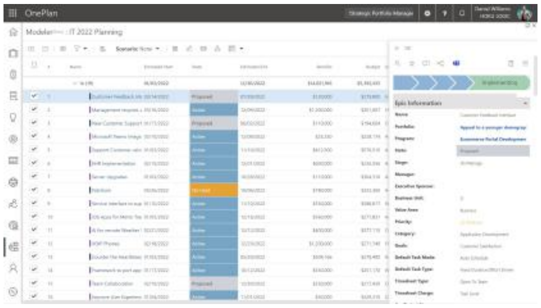
Pivot Table

The Pivot Table is available to get a high level overview of selected data to help you further investigate your different scenarios.



Quick Edit

Open the plan Quick Edit menu to easily modify plan details as needed from the modeler.



Work Plan Grid

Access the Work Plan

This article explains how to access the Work Plan for your plan.

Video Length - 0:36

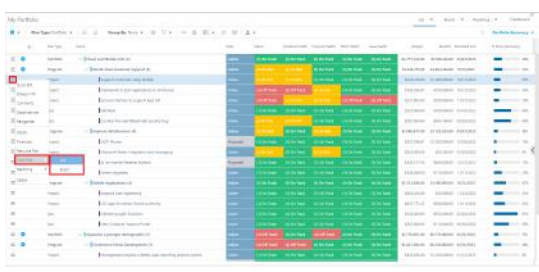
https://player.vimeo.com/video/757677433

From the Home Page

From the home page, in the **Plans** panel, click the quick edit menu next to the desired plan. Go to **Work Plan** and select either **List** or **Board**.

From the My Portfolio Area

From the **My Portfolio** area, locate the desired plan. Click the quick edit menu. Go to **Work Plan** and select either **List** or **Board**.



Work Plan List Header Buttons and Menus

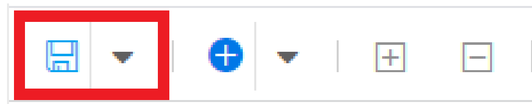
This article explains the icons and functionality of the header in the Work Plan List page. Depending on the work type selected, the icons may be different, as certain functionality applies only to certain work type.

Video Length - 4:17

https://player.vimeo.com/video/757670914

Save the Work Plan

After you make changes to your plan, you will need to click the **Save** button to save those changes.



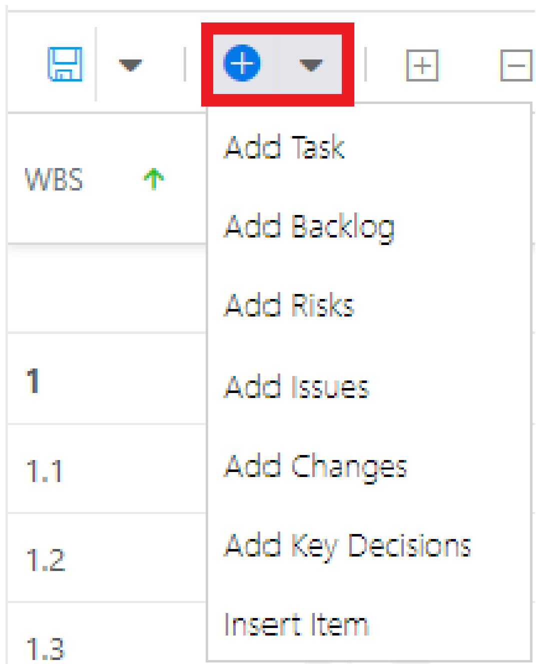
The work plan will not save right away, allowing users to review their plans prior to saving. The save button also allows users to revert the plan (not save) if they do not like the changes they made

The save button Improves performance when editing a work plan since it will not have to wait for auto save.

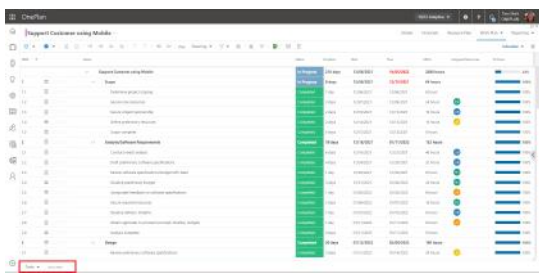
Add Work Items

NOTE
You cannot add new work items when Grouping is on.

Click the Add Item button to add tasks, or other work items to your work plan. OnePlan supports many kinds of work items to best suit your work method.



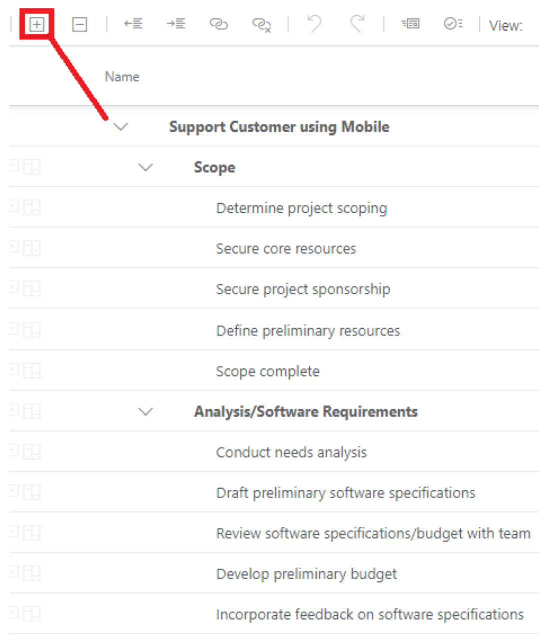
You can also add items from the form at the bottom of the screen.



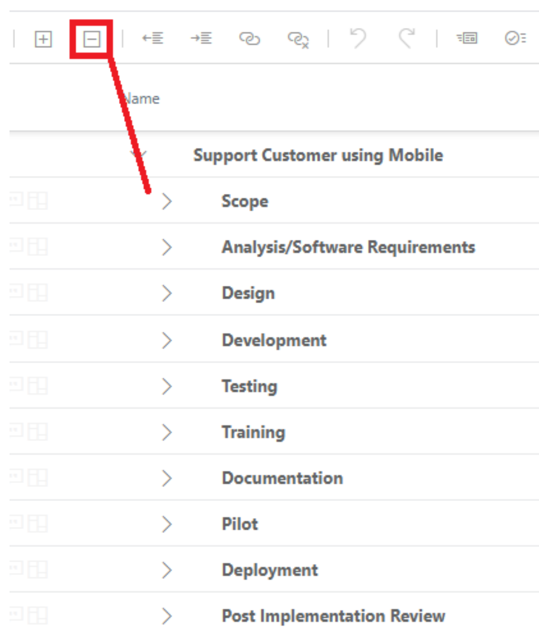
Expand and Collapse Work Items

> **NOTE**
> You cannot expand or collapse your work plan if Grouping is on.

Click the **Expand** icon to show all work items and sub-items in the Work Plan.



Click the **Collapse** icon to minimize the work items.



Indent and Outdent Work Items

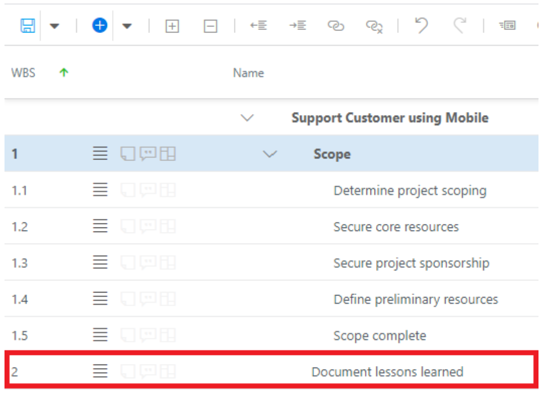
Use the **Indent** and **Outdent** icons to build out the work breakdown structure (WBS). Indenting makes an item a child item.

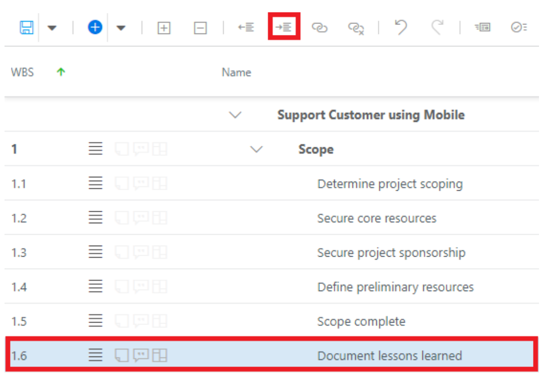
IMPORTANT
To indent or outdent the tasks, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to indent and outdent tasks.

NOTE
You cannot indent or outdent work items when Grouping is on.

NOTE
When you indent or outdent a work item with Timesheet Hours, a message will prompt you to recalculate your schedule to update timesheet hour calculations. This serves as a helpful reminder, ensuring that users are aware of the potential impact on timesheet hours and prompting them to recalculate for accurate scheduling information.

In the example below, **Document lessons learned** is at the same level as **Scope**. When we indent **Document lessons learned**, it becomes a child of **Scope**. Notice the WBS order number has changes from 2 to 1.6, indicating that **Documenting lessons learned** is the sixth child of **Scope**.



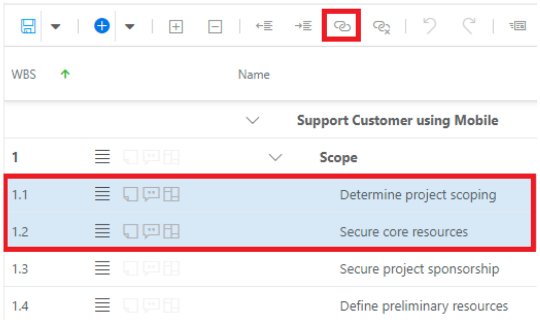


Link and Unlink Work Items

NOTE
It is best practice to sort the WBS column before you link tasks.

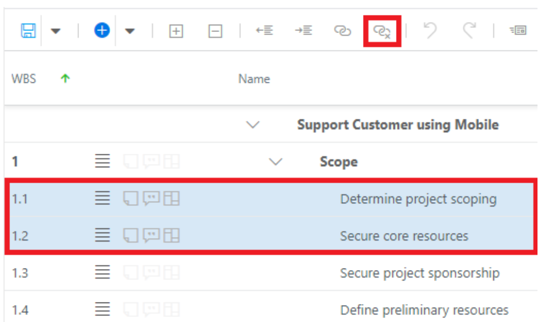
To link items:

1. Hold down the CTRL key to select two items.
2. Click the **Link** icon. The second item becomes the dependent item.

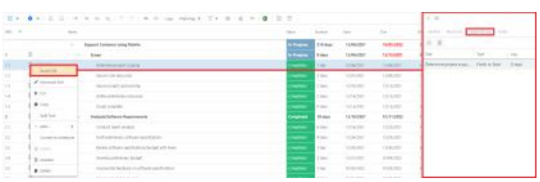


To unlink items:

1. Select the dependent task only.
2. Click the **Unlink** icon.



If using the Link icon, the relationship is automatically Finish-to-Start relationship with 0 lag days. If you want to specify different link type or lag time, select the parent item and open the **Quick Edit** window. Go to the **Dependencies** tab to make your changes.



Open the Resources Panel

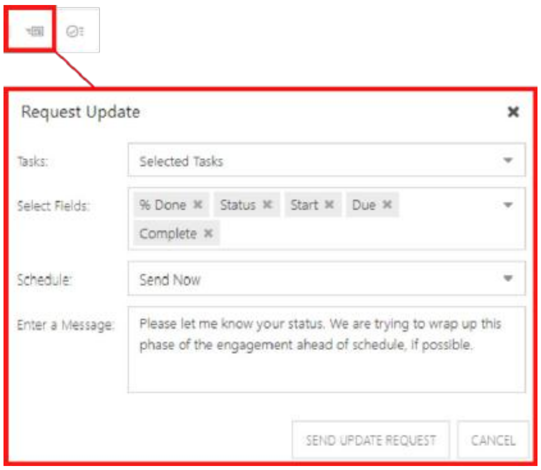
Click the **Resources** icon to open the **Resources** panel for the plan. You can then drag and drop resources from the panel onto Work Items to assign the resources to the item.

Undo and Redo

Click the **Undo** and **Redo** icons to undo or redo actions as needed.

Request Updates

1. Click the **Updates** icon.
2. Complete the **Request Update** form. Click **Send Update Request** button when ready.
   - **Tasks**: Select either **Selected Tasks** or **Tasks Assigned to Me**. You may want to select **Tasks Assigned to Me** to send yourself regular reminders to update your status.
   - **Select Fields**: Use the drop down menu to choose which fields you want updated by the recipient(s).
   - **Schedule**: Select either **Send Now**, **Daily** (specific days & time), or **Monthly** (specific day of the month).
   - **Enter a Message**: This message will be in the email body requesting updates.



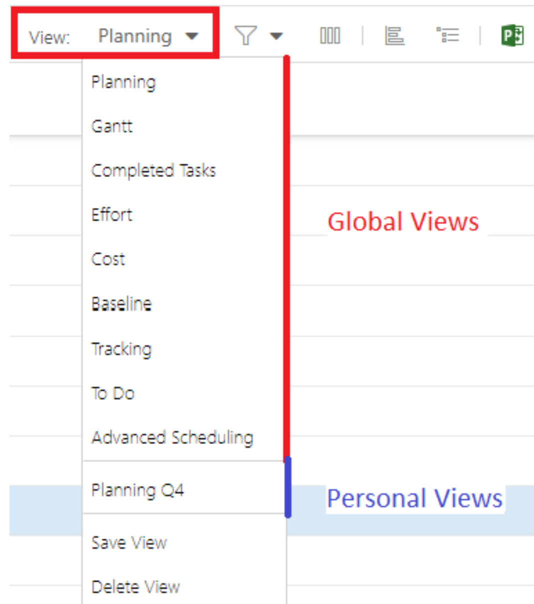
Review Status Updates

1. Click the **Status Updates** icon. The **Status Updates** pop-up will open.
2. In the **Status Updates** pop-up, you can view all of your status updates.
   a. Check the check box next to the desired updates to select. You can select multiple updates at a time.
   b. Click **Accept** to accept the selected updates, or **Reject** to reject the selected updates.

View Menu

Select the **View** menu drop down to change views, save views, and delete views. Global views show in the first section. Only administrators can save global views. Personal views show in the second section, if you have any saved.

See Modify and save Views in the Work Plan Grid [159] for instructions to edit, save, and delete views.

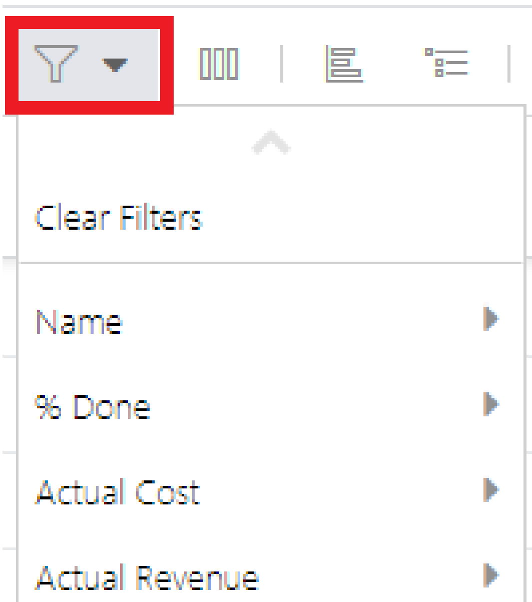


Apply Filters

Click the **Filters** icon to select and apply filters to the Work Plan Grid. You can select multiple filters.

Click **Clear Filters** to clear all filters.

> **NOTE**
>
> As of February 2024, you can filter your Work Plan on Assigned Resources. This improvement enhances the filtering options, providing a more refined and efficient way to focus on work items associated with specific resources.

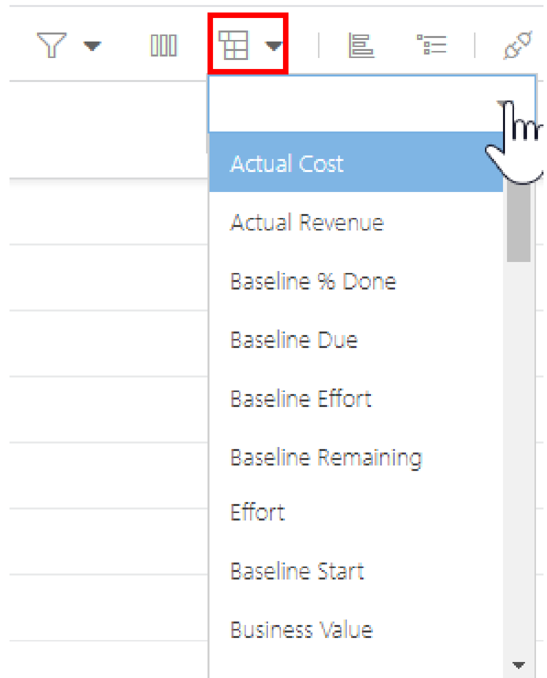


Group Work Items

Click the **Group By** icon to select a field to group the work items by in the grid.

NOTE

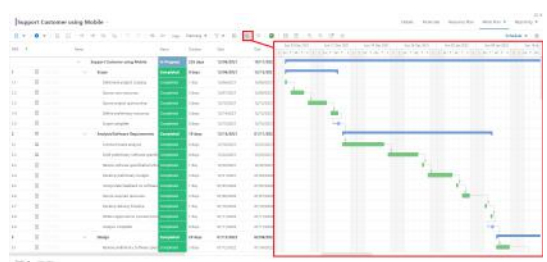
When grouping is enabled, scheduling actions such as drag and drop, indenting, adding work items, etc., are temporarily disabled to maintain the integrity of the grouped view.



Open the Gantt

Select the **Gantt** icon to show the Gantt chart. Select it again to close the Gantt chart.

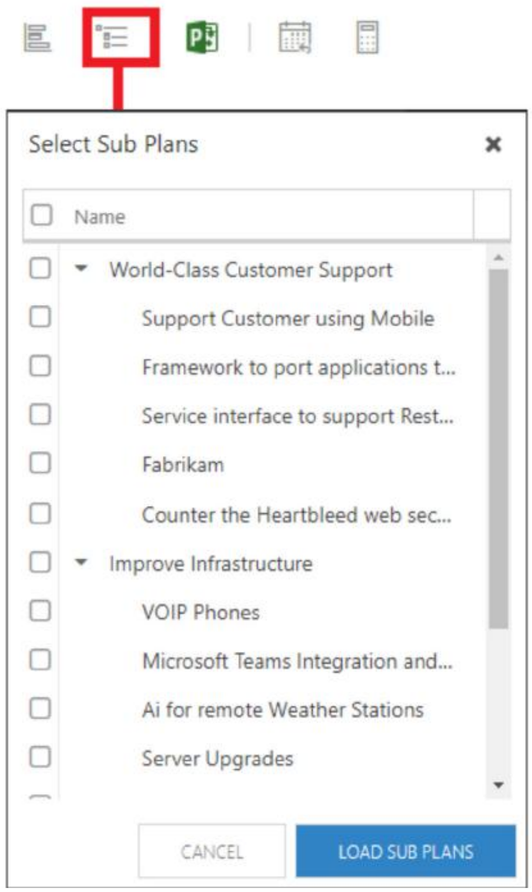
When the Gantt chart is open, additional icons will show for Gantt view controls including: **Zoom In**, **Zoom Out**, **Scroll To**, and **Zoom Fit**.



Sub Plans

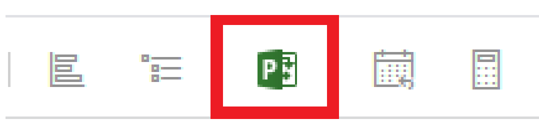
Click the **Sub Plans** icon. The **Select Sub Plans** form will open.

If the current plan has sub plans, you can load them into the current Work Plan. Check the check box next to the sub plans you would like to add. Click **Load Sub Plans**. The selected sub plans will be added to the current Work Plan Grid.



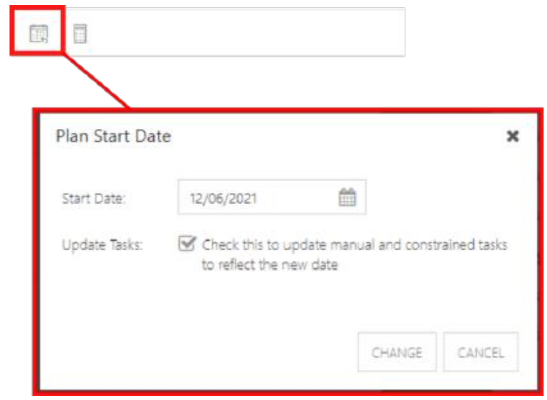
Connected Systems

You may have additional systems integrated with OnePlan, such as Project Desktop, Project for the Web, Azure DevOps, etc. If so, a Connected Systems icon will show on the header to connect this plan to its integrated counterpart in the other system.



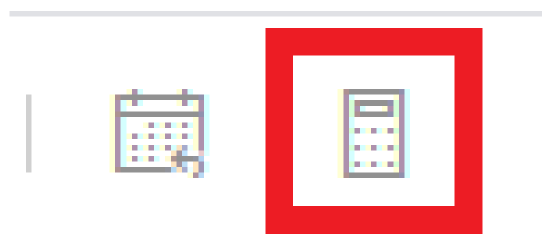
Project Start Date

Click the **Project Start Date** icon to adjust the selected project start date. You can select a new date and choose to move manual and constrained tasks or not. Automatic tasks will automatically be rescheduled.



Recalculate

Click the **Recalculate** icon to manually recalculate calculated fields in the Work Plan.



Set the Plan Start Date

This article explains how to set or update the plan start date for your plan.

The start date for your plan will determine the default start date for the tasks in your schedule. In order for the OnePlan work plan to work as expected, you need to ensure that the plan start date is set properly.

Check the Estimated Start Date

When you first create a new plan, ensure you check the **Estimated Start Date** field in the Plan Details form. This will determine the default start date for the tasks in your schedule.

> **NOTE**
> If there is no Estimated Start Date in the Plan Details, the plan start date will default to the date the plan was created.

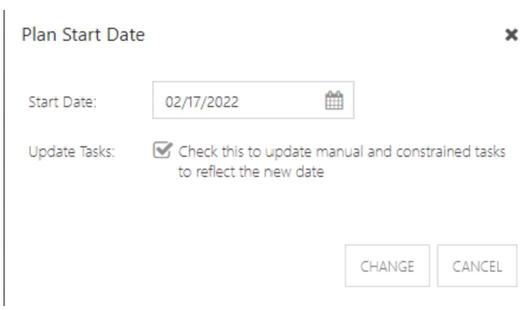
Once you add tasks into the Work Plan, you cannot update the Estimated Start Date field in the Plan Details. If you need to update the plan start date after the plan already has tasks in the schedule, you need to use the Plan Start Date icon in the Work Planner.

Update the Plan Start Date

If you need to update the plan start date, use the **Plan Start Date** icon in the Work Planner.

1. Click the **Plan Start Date** icon in the Work Planner header. The **Plan Start Date** form will open.

2. Complete the **Plan Start Date** form:
   - **Start Date**: Select a new date using the calendar popup.
   - **Update Tasks**: Check the checkbox to have the scheduling engine run through the schedule and update manual and constrained task dates based on the new plan start date.



3. Click **Change**. The plan start date will update to your new set date.

Build a To Do List in the Work Plan

This article explains how to manually build a to-do list of tasks using the To Do view in the OnePlan Work Planner.

Using the OnePlan Work Plan to create and manage your to-do list lets you identify organize prioritize and assign due dates. Also, having your to-do list in OnePlan gives you the added benefit of being able to assign notify and share tasks with your team in one centralized location. You can even use OnePlan to request and receive status updates from your team.

To Do lists in OnePlan have the following features:

- Tasks are manually scheduled, meaning the you have control over the task due dates.
- Tasks are not linked, meaning the tasks are not dependent on each other.
- Tasks use the Fixed Duration/Effort Driven task type.

If you are interested in more advanced work plan scheduling techniques, such as creating a schedule with dependencies or using different task types, see Build a Basic Schedule in the Work Plan [150] or Build an Advanced Schedule in the Work Plan [151].

Video Length - 10:44

This video walks you through the entire process of creating a to-do list using the OnePlan Work Planner.

https://player.vimeo.com/video/770831576

Create a New Plan

A project needs to exist in the portfolio before you can create any work plan. If there is no project, then it needs to be created.

To create a project from the portfolios view:

1. Click the new item icon, select **New Project**.
2. Choose a parent plan from the drop down list. In this example, I will select **World Class Customer Support**.
3. Enter a name for your new plan. In this example, I am creating "OnePlan Academy To Do List".
4. Click **Add Plan**. The new plan, **OnePlan Academy Training To Do List** is now a child plan of **World Class Customer Support**, and is available in this organization's portfolio.

> **NOTE**
> The plan's Quick Edit form will open after it is created. Leave this open for the next section in this procedure.

For more information on creating new plans in OnePlan, see Create a New Plan [77].

Check the Plan Details

There are a few simple but important plan details you need to verify or change before you start to create your to-do list: the **Default Task Type**, **Default Task Mode**, and plan **Estimated Start Date**.

1. Go to your new plan's Plan Details form. From the Quick Edit form, click the hamburger menu, then select **Details**.
2. Locate the **Default Task Type** field. Ensure it is set to **Fixed Duration/Effort Driven**.
3. Locate the **Default Task Mode** field. Change it to **Manual Schedule**.

    > **NOTE**
    > Changing the task mode to **Manual Schedule** allows you to manually enter task due dates, which is ideal for a to-do list.

4. Locate the **Estimated Start Date** field. Ensure this is set to your desired date. This will determine the default start date for the tasks in your schedule.

    > **NOTE**
    > If there is no Estimated Start Date in the Plan Details, then tasks created in your to-do list will start on the date the plan was created.

For more information on managing Plan Details, see Plan Details Overview [85].

Prepare the Work Plan

1. Select **Work Plan** > **List** to access the work plan list view.
2. Confirm that the Work Type is set to **Schedule**. If not, click on the Work Type menu and select **Schedule**.
3. Click on the **View** menu and select **To Do**.

    > **NOTE**
    > **To Do** is an out-of-the-box OnePlan view.

4. For your first time entering the To Do view, click on the **Filters** menu and select **Clear Filters** to ensure there are no filters applied to your work plan.

Add Tasks to the Work Plan

Now that the Work Plan is ready to go, it is time to create a list of tasks. There are a few methods to add new tasks to the Work Plan in OnePlan:

Using the New Item Field

1. Enter the name of the new item in the **New Task** field.
2. Press Enter on your keyboard to add the new task to the bottom of the Work Plan.
3. Edit the Item details as needed.

Using the New Item Header Icon

1. Click the **New Item** icon. A blank task will be added to the bottom of the Work Plan.
2. Enter the name of the new task in the **Name** field.
3. Edit the item details as needed.

Using the task Quick Edit menu

1. Select the Quick Edit menu for a task.
2. Select **Add...** > **Task Above** or **Task Below**.
3. Enter the name of the new task in the **Name** field.
4. Edit the item details as needed.

IMPORTANT

Notice, there are no due dates for the tasks because this has been manually scheduled. You will need to manually enter due dates.

For more information on creating work items in the Work Planner, see Create work items in the Work Plan Grid [161].

Add Due Dates to Tasks

Including task due dates in a OnePlan to-do list clearly communicates what is expected to be done and by when for ourselves and the other team members needed to complete a particular task.

Let's take a look at how to include due dates in a to-do list for this to-do list:

1. Click into the **Due Date** field for the desired task. The calendar form will appear.
2. Select the desired due date using the calendar.

NOTE

Notice that you can add the dates to to-do list items that end before the to-do list item above. This is because this is a manually scheduled list.

NOTE

In this example, I know all of the due dates for the tasks in the list, but it is okay if you do not add a due date right away. You can add the due date that you know, and then add other due dates later for these items. That way you're able to create the full list of to-do list tasks without having to wait for all of the information like those due dates to get a clear picture of Thing that needs to get done to complete the tasks in the one plan to-do lists

NOTE

As you enter tasks due dates, the final due date of the entire to do list project will become the latest due date of the task that has a due date.

Assign Resources to Tasks

Now we're ready to assign resources to tasks for The one plan Academy training to do list. I plan to assign and deliver some of the tasks but I also need help from other resources in the organization to successfully complete all of them by the Target due dates because I'm using OnePlan to create my to-do list. I can assign resources from the one plan Resource Center to these tasks.

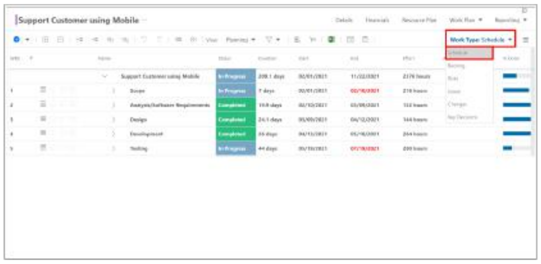
•

Build a Basic Schedule in the Work Plan

This article explains how to manually build your plan's schedule of tasks. You will navigate to the Grid page. Refer to the next article for the steps how to publish a MS Project schedule of tasks.

Navigate to the Schedule Grid

From the Portfolios page, open the Work Type menu and select **Schedule**.



Add new Tasks

See Create work items in the Work Plan Grid [161] for instructions to add tasks.

View and edit Tasks

See View and edit work items from the Work Plan Grid [162] for instructions to edit tasks.

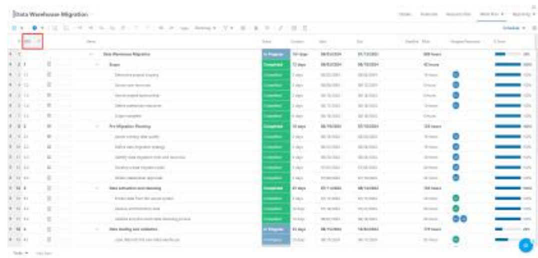
Build an Advanced Schedule in the Work Plan

Split a Task in the Work Plan

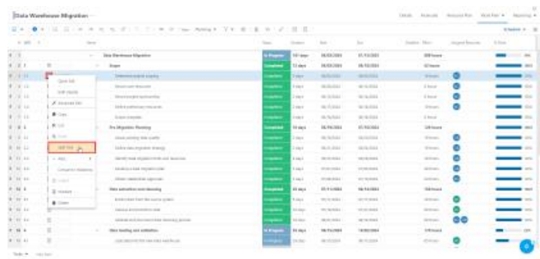
This article explains how to split a task into two sub-items in the OnePlan Work Plan.

> **NOTE**
>
> To split a task, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to split tasks.

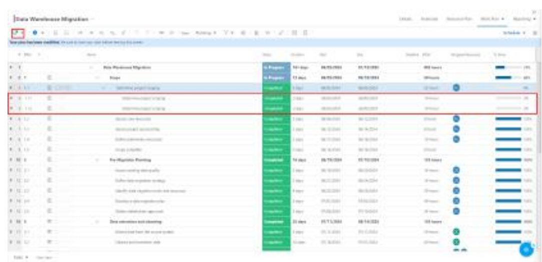
1. Ensure the **WBS** column is in your Work Planner view. Then, click the **WBS** column header to sort the Work Planner into WBS order.



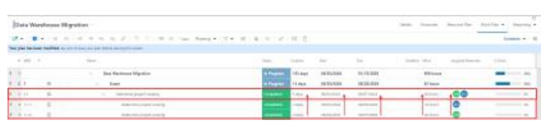
2. Click on the contextual menu ≡ next to the task you want to split. Then select **Split Task** from the drop-down.



Your original task will become a parent item, and will now have two sub-items. The scheduling engine will retain the original dates and duration from the original task for each sub-item, and evenly split the effort from the original task between the two sub-items.



You can update the Start and Due dates, Effort, Duration, Assigned Resources, Status, etc. for each sub-item. These values will roll up to the parent item and will be accounted for in a linked schedule.



3. Click **Save** to save the split task in your schedule.

Manage Plans in the Work Plan Grid

Contextual Menu

Right-click a Work Item or click ≡ on a Work Item to open the contextual menu.

- **Quick Edit**: Click to open the Quick Edit window. See View and edit work items from the Work Plan Grid [162] for more detail.
- **Bulk Update**: Click to open the Edit Tasks form. See Bulk Update Work Items in the Work Plan Grid [161] for instructions on bulk updating work items.
- **Advanced Edit**: Click to open the Advanced Edit window. See View and edit work items from the Work Plan Grid [162] for more detail.
- **Cut**: Click to copy and remove the current work item.
- **Paste**: Click to paste a work item currently loaded in your clipboard.
- **Copy**: Click to copy the current work item.
- **Split Task**: Click to split the current work item into two sub-items.

  NOTE

  To split a task, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to split tasks.

- **Add**: Select an action from the **Add** drop-down. Options include: **Task Above**, **Task Below**, **Milestone**, **Subtask**, **Successor**, **Predecessor.**

  NOTE

  To add tasks, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to add tasks.

  - If you select Subtask, another menu will open. Select the kind of Work Item you would like to add as a subtask from the menu. Options will vary based on the Work Types available in your OnePlan configuration.
- **Covert to milestone:** Click to convert the current work item into a milestone.
- **Indent**: Click to indent the current item. The indented item will become a child of the item above it.

  NOTE

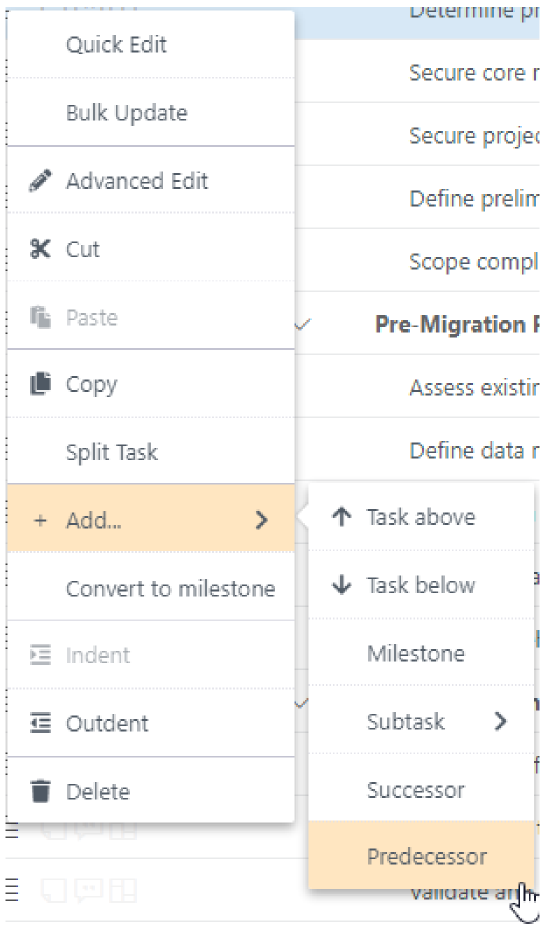
  To indent or outdent the tasks, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to indent and outdent tasks.

- **Outdent**: Click to outdent the current item.

  NOTE

  To indent or outdent the tasks, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to indent and outdent tasks.

- **Delete**: Click to delete the current item.



Editable Grid

Click a field to edit the value.

Move work items

Drag and drop work items to the desired location.

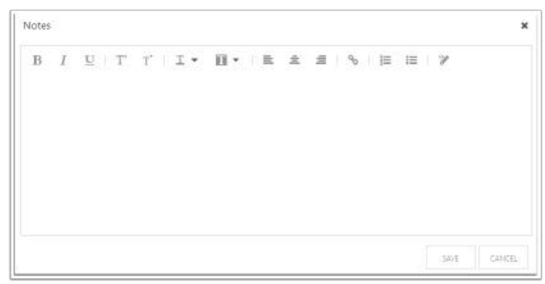
> **NOTE**
>
> To drag and drop tasks, you must sort the WBS column first. Once the tasks are in WBS order, you will be able to drag and drop tasks.

Work item icons

- **Notes:** Click the Notes icon to open the Notes form.
- **Comments:** Click the Comments icon to open the Comments form.
- **Activities**: Click the Activities icon to open the Activities board.

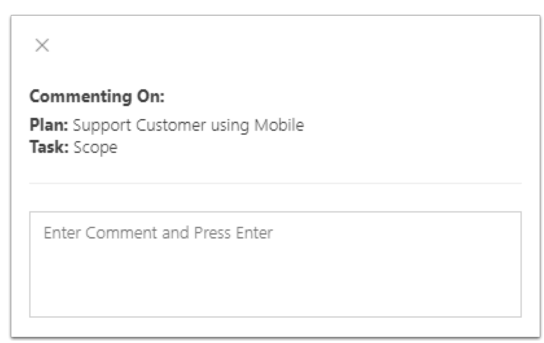
Notes

Enter notes into the Notes form.



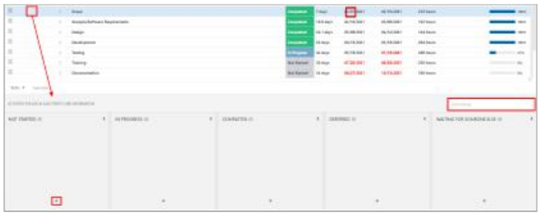
Comments

Enter comments into the Comments form.



Activities

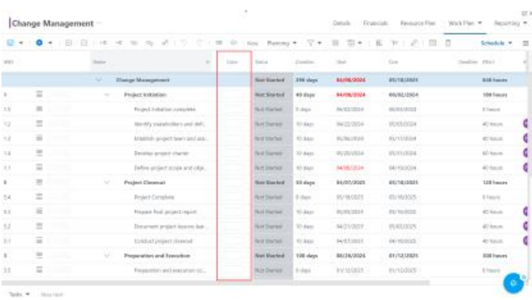
Move, add, and edit work item activities in the Activities board.



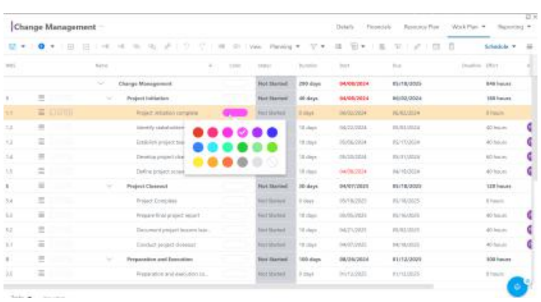
Assign Colors to Work Items in the Work Plan Grid

This article explains how to assign colors to work items in the work planner for easy categorization and visual identification.

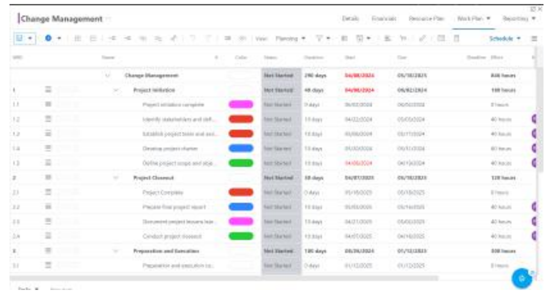
Categorizing your tasks by color is simple using the Work Plan grid. First, make sure that you add the Color column to the view.



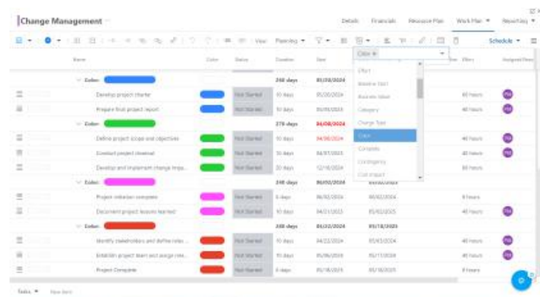
To apply a color to a task, click into the Color field for the item, then select a color from the palate.



Apply colors to all of your tasks for easy, visual categorization.



You can even group your tasks by color. Click on the Group By icon, and select Color from the drop-down. The items in your work plan will be grouped by the colors you applied to them.

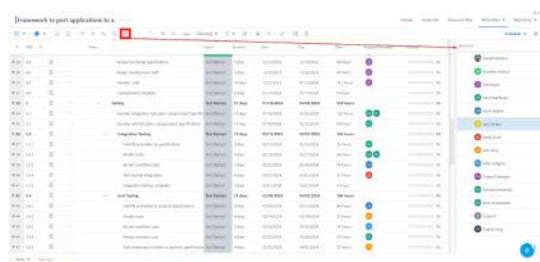


Assign Resources to Work Items in the Work Plan Grid

This article explains how to assign teams of resources to Work Items in the Work Plan Grid / List.

From the Resource Panel

1. Click the **Resources** icon in the Work Plan header. The **Resources** panel will open on the right side of the screen.



2. Select the desired resource from the list, then drag and drop the resource to the desired Work Item.

NOTE

It is helpful to have the **Assigned Resources** column added to your Work Planner view so you can easily see which resources are assigned to which tasks.

From the Assigned Resource Field

1. Click in the **Assigned Resources** field for the desired Work Item. The Resource selection menu will open.
2. Select a resource from your team. You may also type in a new name of a resource. After you do so, the project plan will be shared with them.

NOTE

You may want to review and adjust their permissions after adding a new resource to your plan.

Assign Teams to Work Items in the Work Plan Grid

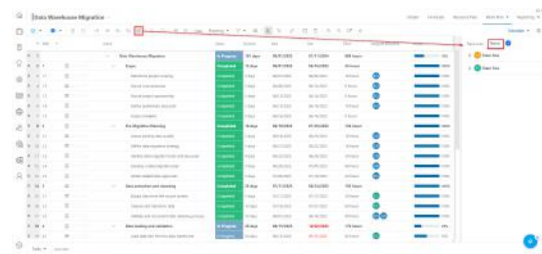
This article explains how to assign teams of resources to Work Items in the Work Plan Grid / List.

If you assign a work item to a team, all users in the team will be added to the shared with for your plan.

If a team is assigned to a work item, cost and rate calculations will use the cost and rate set on the team (in the resource center). Individual resource costs and rates will not be used when assigning teams to work items. This includes the plan level rate tables that can be created for a plan.

From the Resource Panel

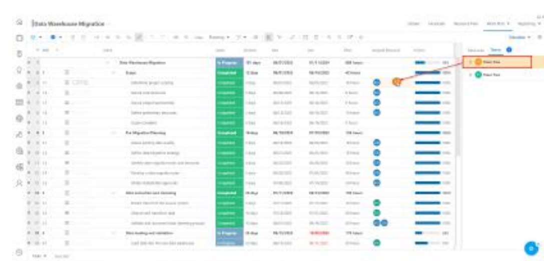
1. Click the **Resources** icon in the Work Plan header. The **Resources** panel will open on the right side of the screen. Then click the **Teams** tab.



2. Select the desired team from the list, then drag and drop the team to the desired Work Item.

NOTE

It is helpful to have the **Assigned Resources** column added to your Work Planner view so you can easily see which resources are assigned to which tasks.

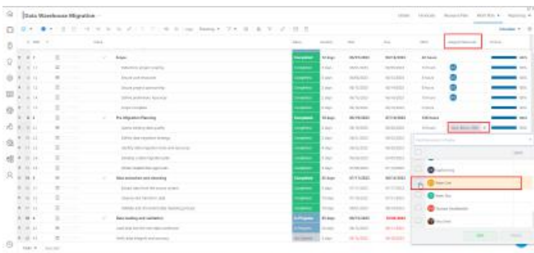


From the Assigned Resource Field

1. Click in the **Assigned Resources** field for the desired Work Item. The Resource selection menu will open.

2. Select a team from the list. You may also type in a new name of a team. After you do so, the project plan will be shared with that team.

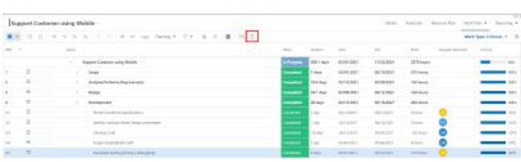
> **NOTE**
> You may want to review and adjust the team's permissions after adding a new team to your plan.



Recalculate cost in the Work Plan Grid

The recalculate button recalculates anything that is related to cost including Timesheets.

- In certain scenarios, recalculating financials or timesheets hours may be needed. Clicking this button will update the values to the most current.

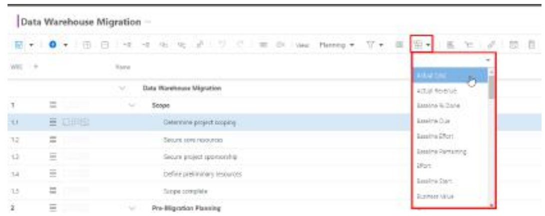


Group Tasks in the Work Plan Grid

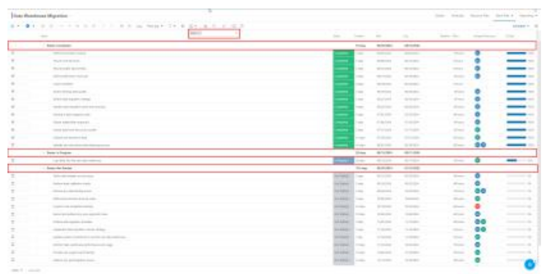
This article explains how to use the grouping feature in the Work Plan to organize work items in your Work Plan Grid.

Apply a Single Grouping

To apply a single grouping to your Work Plan, click on the **Group By** icon, then select the field you want to group the work items by.



Once the grouping is applied, headers with each group will appear in the Work Plan, and the work items will be sorted based on the grouping selected. In the example below, the Work Plan is grouped by Status.

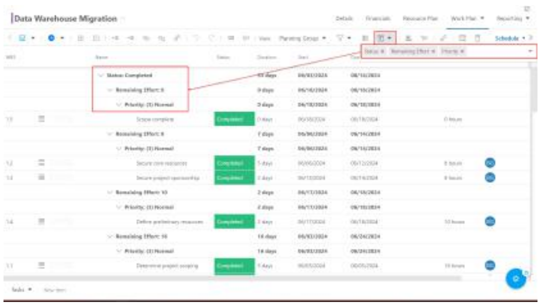


Apply Multiple Level Grouping

As of the May 2024 release, you can group the work plan by up to three levels for streamlined organization of work items.

To apply multiple-level grouping to your Work Plan, click on the **Group By** icon, then select the fields you want to group the work items by. The grouping hierarchy will stack from left (the top of the hierarchy) to right (the bottom of the hierarchy). So, the first field you select will be at the top of the grouping hierarchy. Then each additional field you add will become a child of the previous field.

In the example below, the Work Plan is grouped by Status (the top level of grouping), then by Remaining Effort (the second level of grouping), and finally by Priority (the bottom level of grouping).



Create Local Plan Fields in the Work Plan

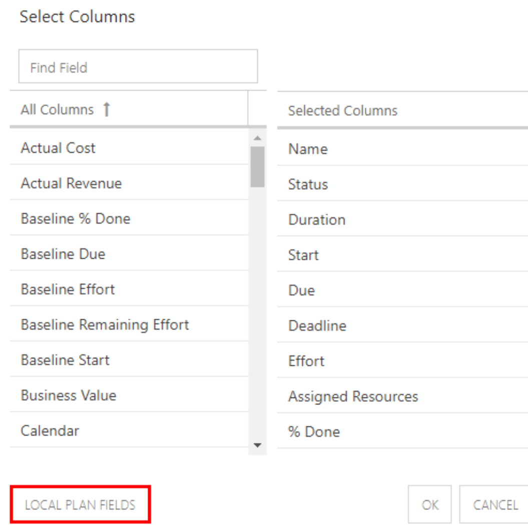
This article explains how to create and manage local plan fields in the Work Planner.

Plan Managers can create local plan fields to capture additional information for work items. These fields are exclusive to your plan and serve for internal reference only. Local plan fields will not be included in the OData feed or in any reports.

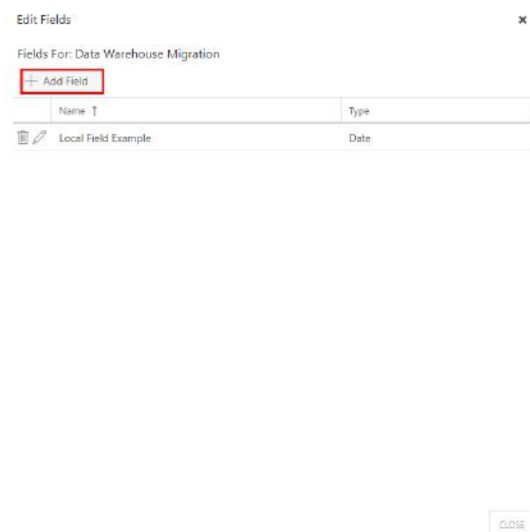
> **IMPORTANT**
> You can create up to 10 local fields per plan.

1. Click the **Columns** icon. The **Select Columns** form will open.

2. Click **Local Plan Fields**. The Edit Fields form will open.



3. Here you will see a list of all existing local plan fields (if available). You can also edit and delete existing local fields from here. To create a new local plan field, click **Add Field**. The **New Task Field** form will open.



4. Complete the **New Task Field** form.
   a. Give your new local plan field a Name.
   b. (Optional) enter a description for your field. This description will appear as a tooltip when you hover your mouse over the field in the Work Plan.
   c. Select the field type. Options include:
      - Text
      - Date
      - Number
      - Currency

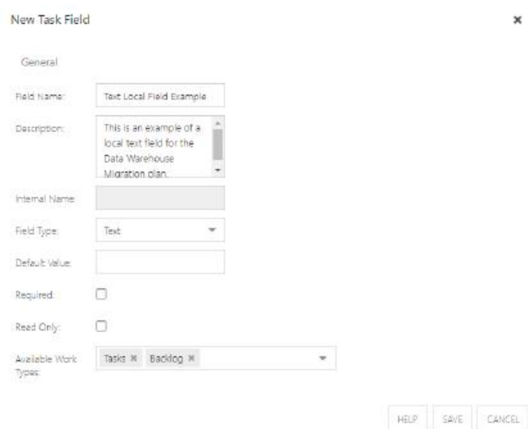
- YesNo
- Choice
- User
- Multichoice

The field configuration form will change dynamically based on your selection. See Create and Edit Plan Fields for more information on the different field types and their configuration.

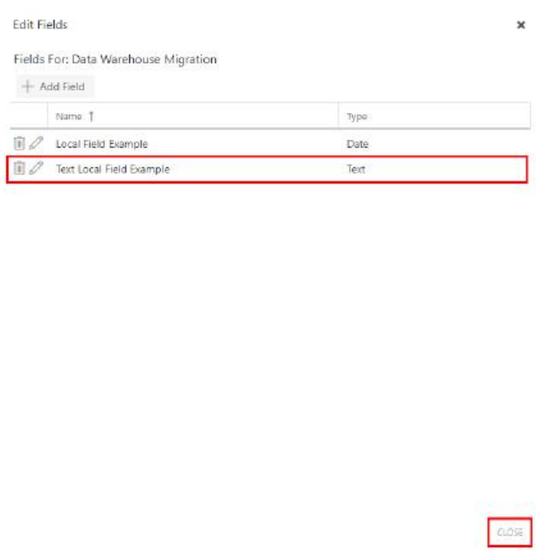
d. Check the **Required** check box if the field is required.

e. Check the **Read Only** check box if the field is read-only.

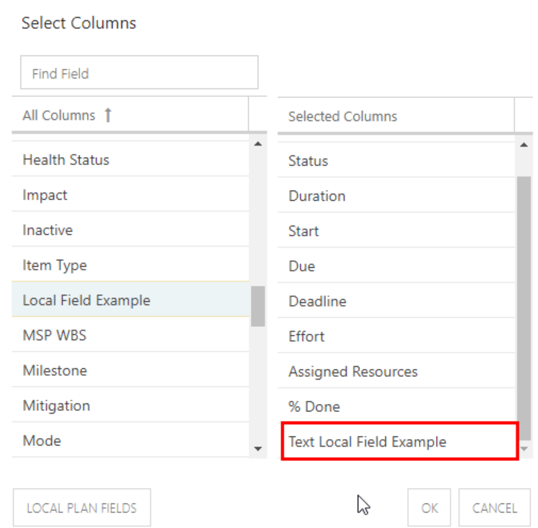
f. Select the Work Types this local plan fields will be available for.



5. Click **Save**. You will return to the **Edit Fields** form. Your new local plan field will now be available in the list of all local fields for the current plan.

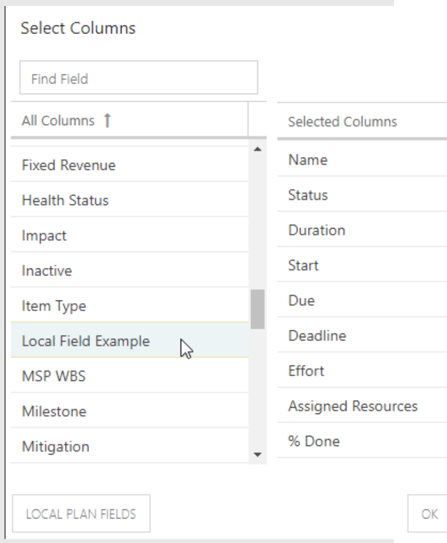


6. Click **Close**. You will return to the **Select Columns** form. The new local plan field will automatically be added to your Work Plan view. You can drag and drop the fields in the **Select Columns** window to rearrange your view.



NOTE

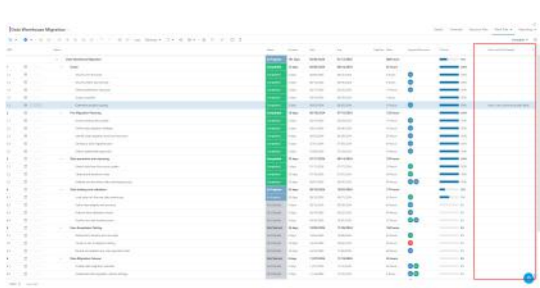
If you do not save a Work Plan view with your local plan fields, they will then become available in the **All Columns** section of the **Select Columns** form, so you can add them back into your Work Plan at any time.



7. Click **Ok**. Now you can enter data into the local plan field right from your Work Plan.

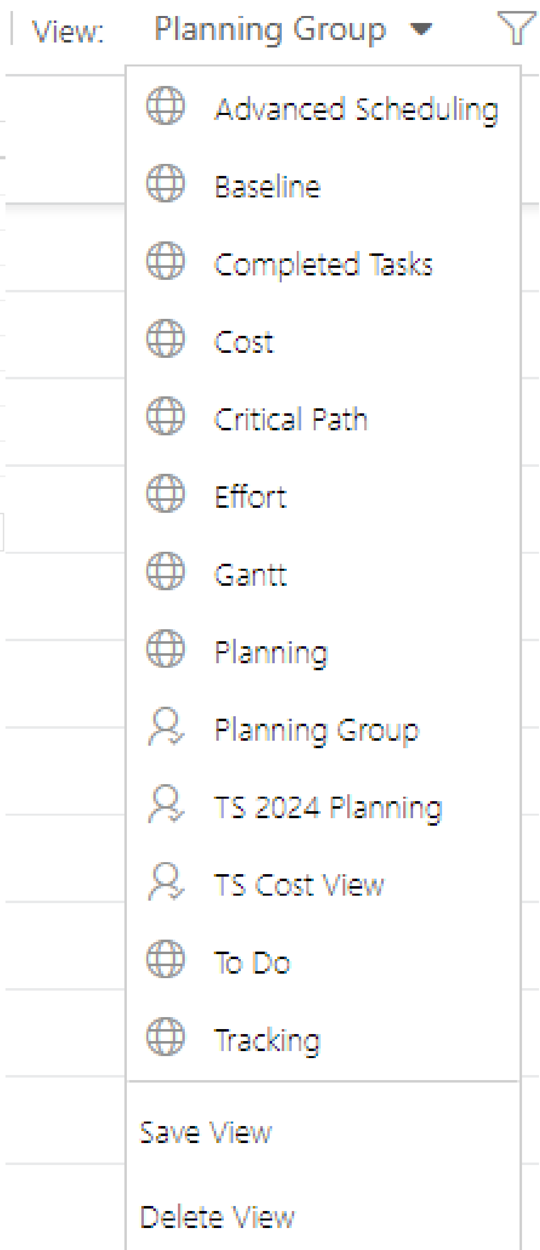
IMPORTANT

We strongly recommend saving a view with your local plan fields. See Modify and Save Views in the Work Plan Grid for instructions.



Modify and Save Views in the Work Plan Grid

Select the View menu drop-down to change views, save views, and delete views. Views are listed in alphabetical order. Global views have a globe icon next to them. Only administrators can save global views. Personal views have a person icon next to them, if you have any saved.

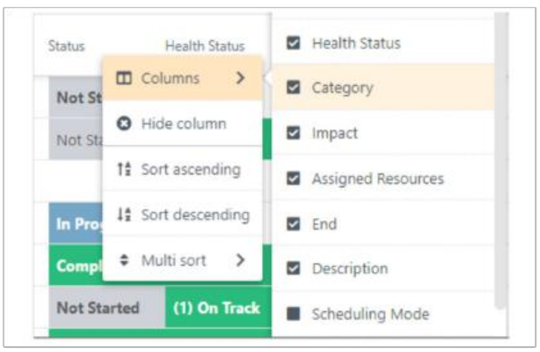


Modify View

Make changes to the view, such as adding columns, arranging columns, etc. Whether or not the Timeline, Gantt, and Activities show is a saved with the view.

Add and remove columns

To add or remove a column from the view, right-click in any column header. Expand the Columns sub-heading. The columns already in the view marked with a check. The remaining available fields are listed. Select or deselect the columns to show or hide in the view. Newly added columns show on the far right.



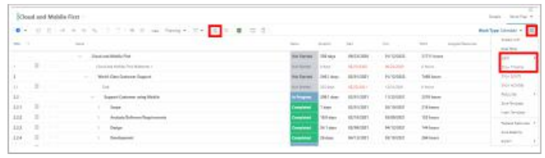
Arrange column order

To arrange the columns, click on the column heading and drag the column to the desired location. Let go of the mouse to drop the column in that spot.

Select additional Work Plan Grid options

Open the Grid options menu. Select the desired Grid options to show.

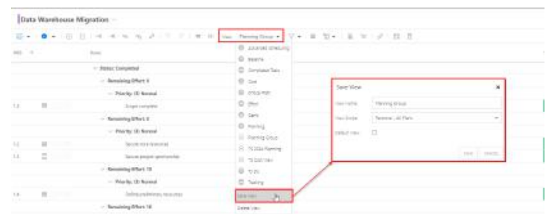
NOTE: Only the Gantt and Timeline can be saved in a view. All other Grid options must be applied when working in the Grid.



Save a view

Make any changes to the view, such as adding columns, arranging columns, etc.

1. On the View menu, select **Save View**. The **Save View** form will open.

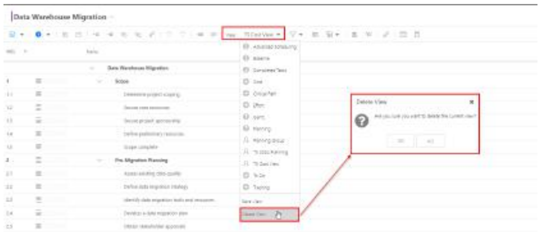


2. Complete the **Save View** form.
   a. **View Name:** Initially, the current view name will show. Update to a new name. If updating a view rather than saving a new view, keep the name as-is.
   b. **View Scope:** Set the scope for the new view. Options include:
      - **Global - All Plans:** This view will be available for all users in all plans in your OnePlan Work Planner. Only Administrators can save Global views.
      - **Personal - All Plans:** This view will only be available for you across all plans in your OnePlan Work Planner.
      - **This Plan:** This view will only be available for the current plan. You want to use this option when you use local plan fields in the plan.
   c. **Default View:** Check the checkbox if this is a default view. A default view will open automatically when you go to the Work Plan.
3. Click **Save**. Your new view will now be available from the Views menu.

Delete a view

Navigate to the view you want to delete.

1. On the View menu, select Delete View. Deleting a global view deletes it for everyone.
2. Confirm deletion.

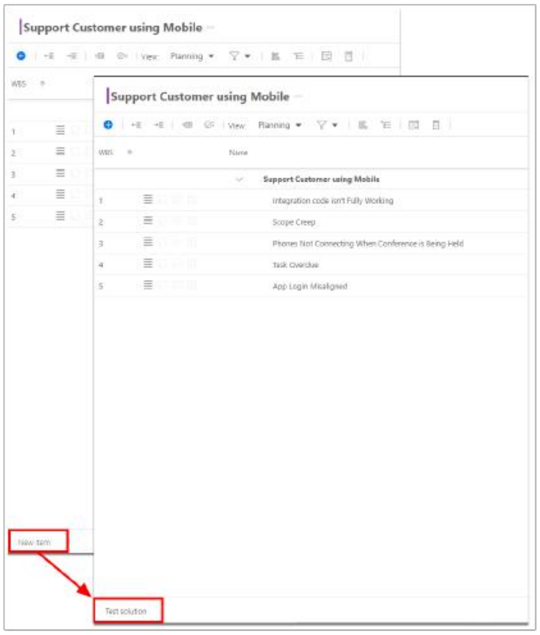


Create work items in the Work Plan Grid

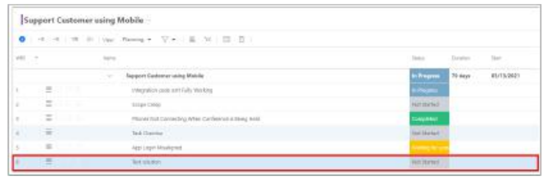
This article explains how to create and edit work items from the Work Plan Grid.

New item quick entry

1. **If in the Schedule view:** Select the item type you would like to add from the drop down. Options include **Tasks**, **Backlog**, **Issues**, **Risks**, **Changes**, **Key Decisions**.
2. Enter the name of the new item in the **New Item** field.
3. Press Enter on your keyboard to add the new item to the bottom of the Work Plan.
4. Edit the Item details as needed.

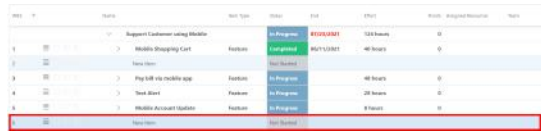


The newly created task appears at the end of the plan (after the last task).



New Task icon

1. Click the **New Item** icon. A blank work item will be added to the bottom of the Work Plan.
   - **If in the Schedule view:** Select the item type you would like to add from the drop down. Options include **Add Task**, **Add Backlog**, **Add Issues**, **Add Risks**, **Add Changes**, **Add Key Decisions**, or **Insert Item**.
   - If you select **Insert Item**, use the pop-up to locate and select an existing item to add to the current Work Plan.
2. Enter the name of the new item in the **Name** field.
3. Edit the item details as needed.



Bulk Update Work Items in the Work Plan Grid

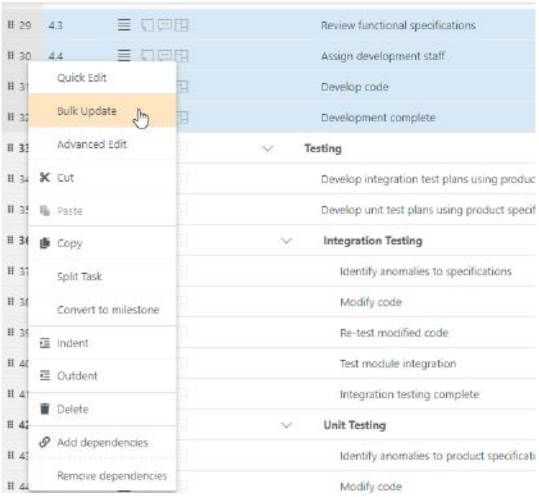
This article explains how to bulk update Work Items in the OnePlan Work Plan Grid / List.

Using the bulk update feature, you can quickly update many values for multiple Work Items including general Item data, the Mode and Scheduling Mode of the Items, and single select user fields for the Items.

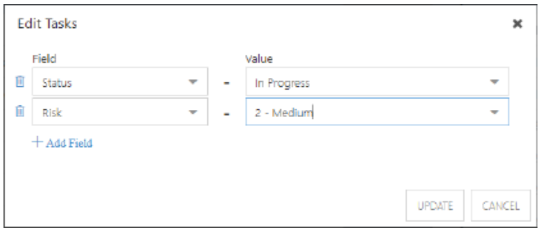
To bulk update Work Items:

1. Select multiple Work Items from the List view either using Control+click or Shift+click.
2. Right-click or click ☰ to open the contextual menu for one of the selected Work Items.

Select **Bulk Update**. The **Edit Tasks** form will open.



3. Complete the **Edit Tasks** form.
   - **Field**: Select the Work field you would like to update.
   - **Value**: Set the value you would like to update the selected Work field to.
   - **Add Field**: If you would like to update more than one field for the selected tasks, click Add Field. This will add another set of **Field** and **Value** fields to the **Edit Task** form.



4. Click **Update** to update the selected tasks.

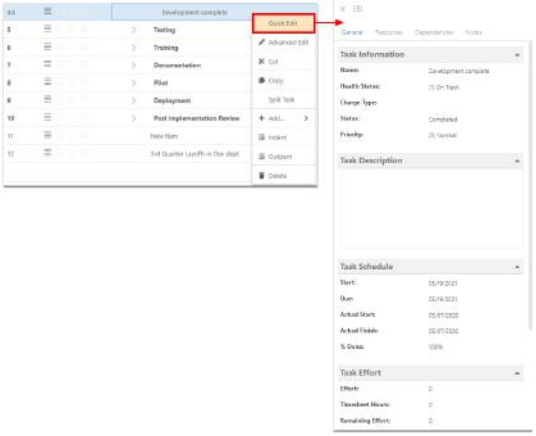
View and edit work items from the Work Plan Grid

This article explains how to view and edit work items from the Work Plan Grid.

Work item contextual menu

Right click a work item to open the item contextual menu.

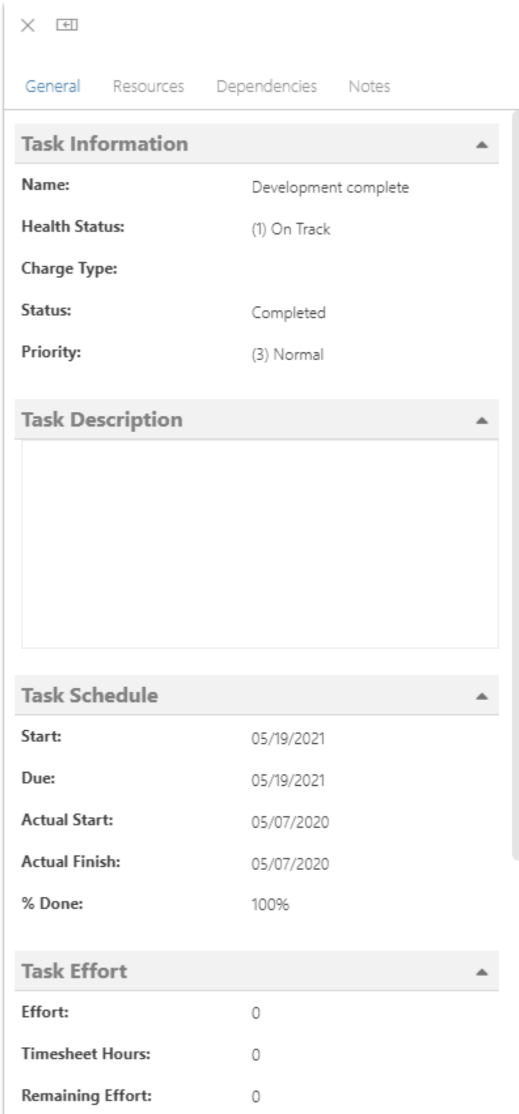
Quick Edit



General tab

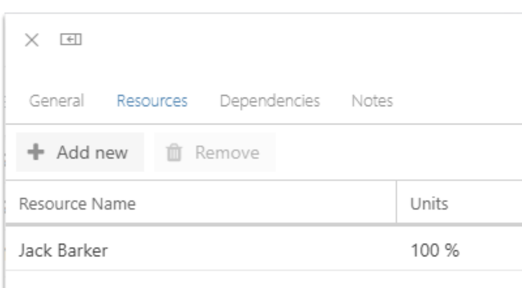
The General tab shows general item information like:

- Item Information
- Item Description
- Item Schedule
- Item Effort
- Item Financials



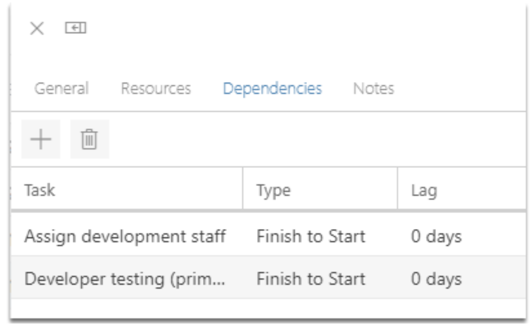
Resources tab

See all item resources. Click **Add new** to add a resource. Click **Remove** to remove a resource.



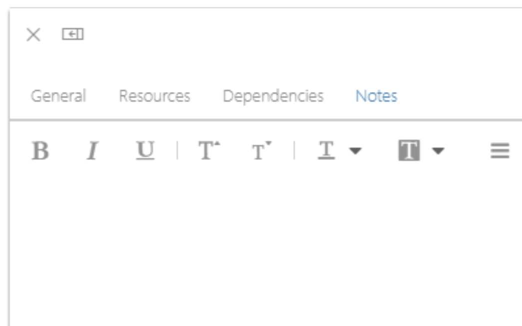
Dependencies tab

See all item dependencies. Click the **Add** (+) icon to add a dependency, or the **Remove** icon to remove dependencies.

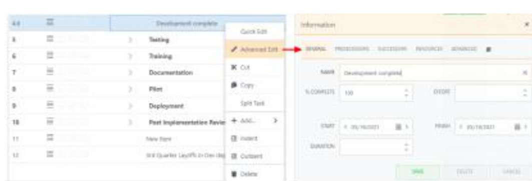


Notes tab

Add and edit notes on the item as needed.



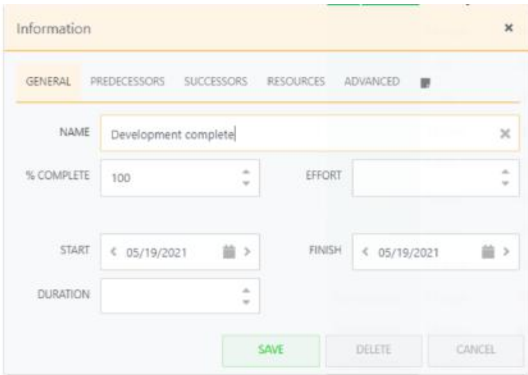
Advanced Edit



General tab

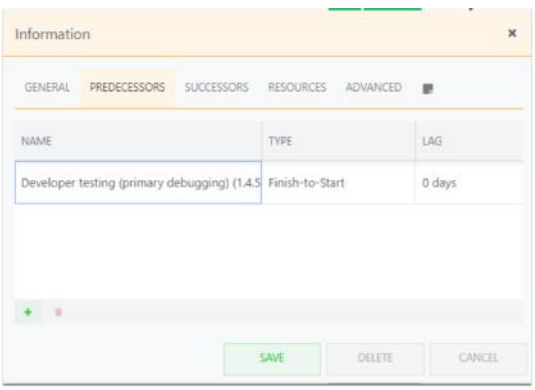
Your fields may differ per your environment's configuration.

- Name
- Percent Complete
- Duration
- Start and Finish Dates
- Effort



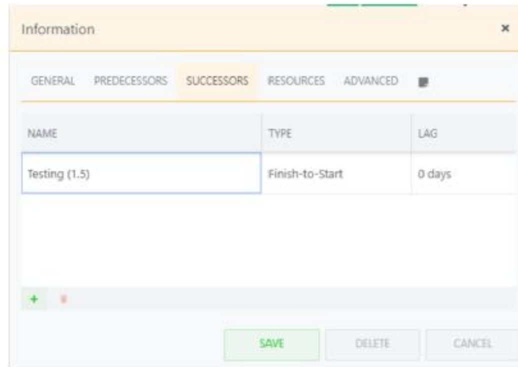
Predecessors tab

Here you see any existing predecessor relationships, for which this item is the predecessor/ dependent task. To add a new link, click the **Add** new button. To remove a relationship, click the **Remove** button.



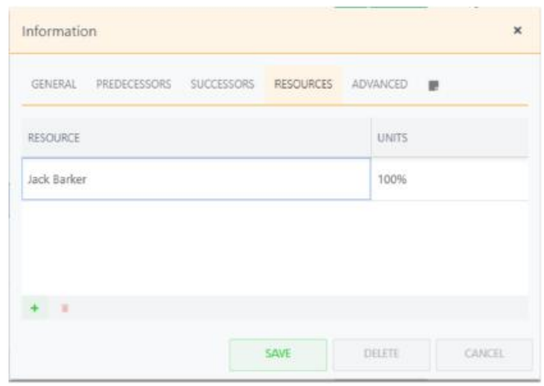
Successors tab

Here you see any existing successor relationships, for which this item is the successor task. To add a new link, click the **Add** new button. To remove a relationship, click the **Remove** button.



Resources tab

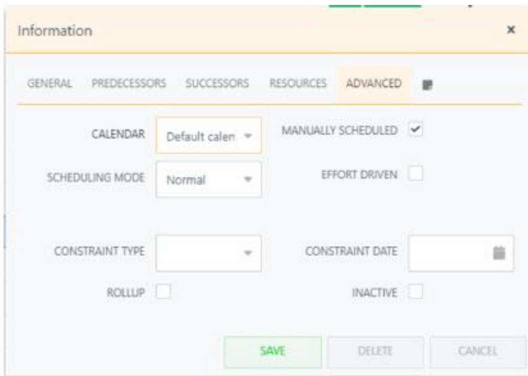
Here you see the assigned resource(s). You may change the resource assigned and you may update % units. Click next to the resource name or the % units to activate the drop down menus.



Advanced tab

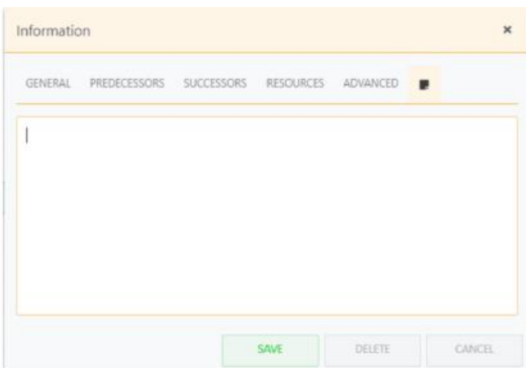
View or edit the following fields as needed. Your fields may differ per your environment's configuration.

- Calendar
- Manually Scheduled: checkbox
- Scheduling Mode
- WBS Code
- Constraint Type
- Constraint Date
- Status
- Complete
- Work Type
- Iteration
- Estimated Cost
- Estimated Revenue
- Etc.



Notes Tab

Add and edit notes on the task as needed.



Review and Approve Updates to the Work Plan

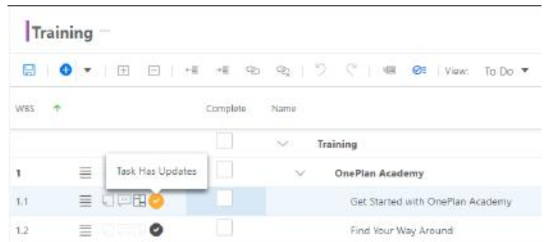
This article explains how to review and accept or reject changes to work plan.

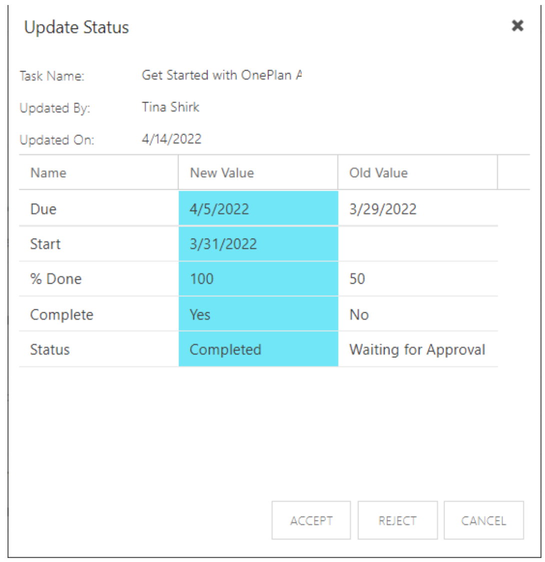
When changes are made to a work item or work plan - either from a Team Member's My Work list or from the work plan itself - the changes are sent out for review and approval.

You can either review the updates individually, or all at once from the Status Updates window.

Review Updates Individually

1. Expand the work items. Items that have updates will have check marks next to them.
2. Click on the check mark for the desired work item. The **Update Status** window will open.
3. Review the updates. Updates values are highlighed in blue.
4. If approved, click **Accept**. The updated values will be added to the work plan. If rejected, click **Reject**. The updated values will not be added to the work plan.





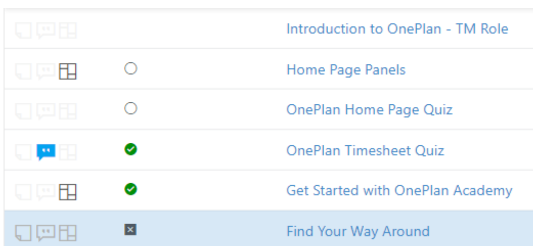
Review Updates All At Once

1. Click the **Status Updates** icon from the work plan header. The **Status Updates** window will open.
2. Review the updates. Updates values are highlighed in blue.
3. To accept changes, check the checkbox next to the desired updates and click **Accept**. The updated values will be added to the work plan. To reject changes, check the checkboc next to the desired updates and click **Reject**. The updated values will not be added to the work plan.

Status Approval in My Work

If a work item update came from a Team Member's My Work, once you approve or reject an update in the work plan, the **Status Approval** state will update in the Team Member's My Work list.

- Open circle: Pending
- Green checkmark: Approved
- Gray X: Rejected



What are Work Types and How do I Use Them?

This article explains what work types are and how to use them.

Your OnePlan group may have different work types configured per your business process. You may not have any extra work types configured.

Video Length - 00:36

https://player.vimeo.com/video/757683724

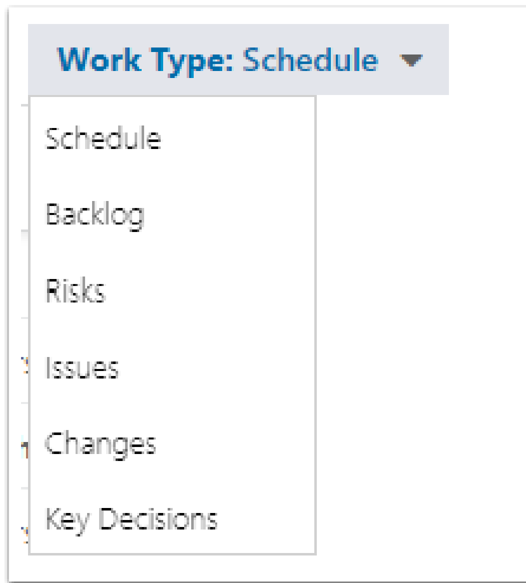
What are work types?

By default, OnePlan comes with Tasks, Schedules, Issues, Risks, Backlogs, and Key Decisions the default work types. A work type is a category of the way work is done, such as with different scheduling methods, processes, etc.

Work types are configurable to align to your business needs, which is done by the Admin. When looking at the Work Plan pages, views are saved for that specific work type.The additional work type items show in Timesheets and My Work.

Navigate to the Work Plan

Navigate to the Work Plan. Regardless whether you are viewing the List or Board, you can select the work types. You may have a task schedule, whether built in the Work Plan directly or integrated from another tool, such as Project Desktop or Project for the Web. But, to track other work that needs to be done, select the appropriate work type, such as Issues. Add the items to the Work Plan for that work type.



Add and manage work items

Add and manage work items for the selected work type. There is a default view per work type. You may save views as needed per work type.

See Create work items in the Work Plan Grid [161] and Manage Plans in the Work Plan Grid [152] for further detail and instructions on creating and managing work items.

All work items, from the various work types show in the My Work and Timesheet pages as well.

NOTE
When the **Backlog List** App is added to your OnePlan group, a new work type called Backlog gets created. The fields and views are also added.

Manual and Automatic scheduling

Tasks can either be manually or automatically scheduled.

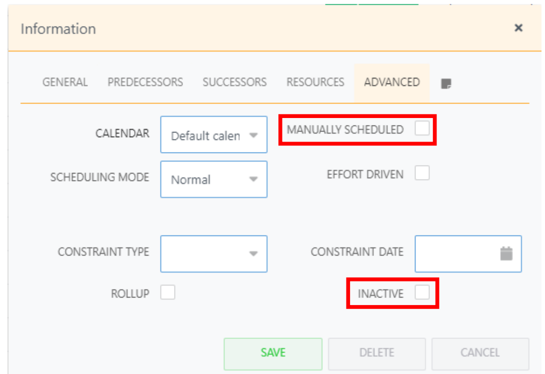
Automatically scheduled tasks' start and end dates are automatically updated based on the task constraints, dependencies (predecessors or successors), and position in the plan hierarchy. This means that a task start and end date can be updated as soon as the task is added to a plan.

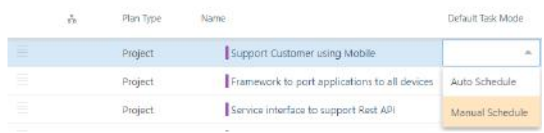
Manually scheduled tasks are manually adjusted by the user.

By default, tasks are automatically scheduled. To manually schedule a task, go to the task contextual menu > **Advanced Edit** > **Advanced** and check the **Manually Scheduled** check box.

You can also set automatic or manual scheduling at the plan level. Add the Default Task Mode column to the view (right-click then select Default Task Mode). Then select **Auto Schedule** or **Manual Schedule.**

To exclude a task from scheduling, Go to the task contextual menu > **Advanced Edit** > **Advanced** and check the **Inactive** check box. Inactive tasks do not push their linked tasks or rollup their attributes to parent events.





Project scheduling direction

Currently, OnePlan supports forward project scheduling.

Forward scheduled projects:

- are scheduled out from a specified start date
- tasks are scheduled as soon as possible (ASAP)
- the project start date is mandatory
- the project end date is equal to the latest end date of its tasks
- The OnePlan scheduling engine creates a base **Start no earlier than** constraint from the project start date that is inherited by all tasks. This means any task with no restrictions will automatically start on the project start date.

The project scheduling direction used in the work planner effects how automatically scheduled tasks interact with each other.

Scheduling Mode (aka Task Type)

The scheduling mode (also called task type) is a mathematical formula used by the OnePlan work plan to automate scheduling as you build and adjust your work plan. The scheduling mode calculation uses three task values:

- **Duration**: How long the task will take. Measured in days by default.

- **Effort**: How many total hours are estimated to do the task. Default effort is 8 hours Effort = 1 day Duration.
- **Units**: The percent a resource is allocated to a task. Default 100% allocation of one resource = 8 hours Effort, or 1 day Duration.

> **IMPORTANT**
>
> Duration, Effort, and Units are all based on the calendar applied to a given task. The default calendar is set to 1 day = 8 hours = 100% allocation for 1 day, with a 40 hour work week. However, you can apply custom calendars which can change these values, and thus change the Duration, Effort, and Units calculations in the work planner.

The scheduling mode defines which task properties are fixed (provided by user) and which ones should be calculated. You may set the scheduling mode at the plan level, which will set the default for each new task in your plan, or change individual tasks as needed.

There is also an **Effort Driven** setting that fixes the task effort value. When set, it tells the event to preserve its effort value and recalculate the other properties.

> **NOTE**
>
> At the plan level, scheduling mode is referred to as the **Task Type**. See How do I add the Default Task Type field? to add the **Default Task Type** field to your OnePlan group. When you set the scheduling mode / task type at the plan level, all new tasks added to the plan will automatically be set to the selected scheduling mode / task type.

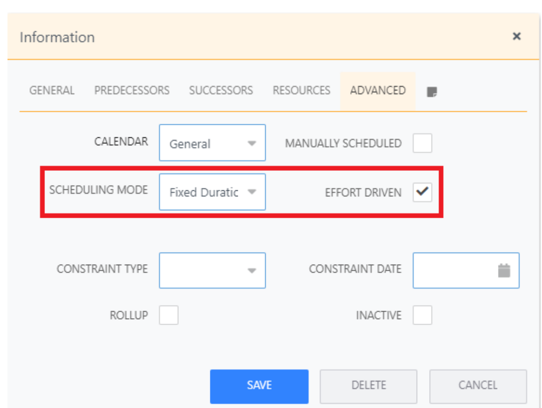
> **NOTE**
>
> To set the default task type at the plan level, see Set Default Task Type at the Plan Level [171].
>
> To set the scheduling mode at the task level, see Set the Scheduling Mode (Task Type) at the Task Level [171].

Available Scheduling Modes / Task Types

Fixed Duration / Effort Driven (Default)

> **IMPORTANT**
>
> This is the default scheduling mode in the OnePlan work plan. We highly recommend that you use Fixed Duration / Effort Driven scheduling, unless you have a specific need for a different scheduling mode.

In this mode, tasks are set to the **Fixed Duration** scheduling mode with the **Effort Driven** setting on.



This means that task duration and effort are fixed and provided by the user. Resource assignment units are calculated by OnePlan. So, tasks will always recalculate assignment units whenever there are changes to the duration or effort.

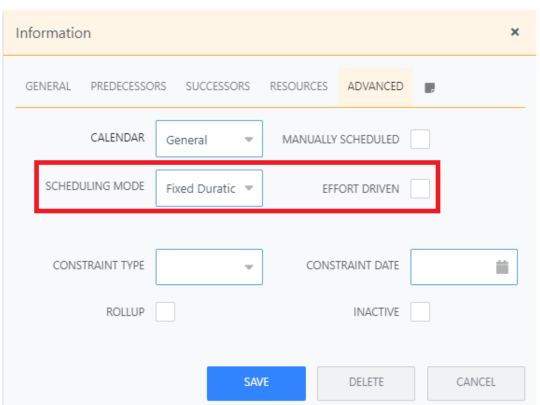
This video demonstrates how the Fixed Duration / Effort Driven scheduling mode functions in the work plan.

https://player.vimeo.com/video/728897898

Fixed Duration / Non Effort Driven

In this mode, tasks are set to the **Fixed Duration** scheduling mode with the **Effort Driven** setting off.

NOTE
Calculations provided by this mode work only if the task has at least one resource assigned.



This means the task has fixed start and end dates and duration, but its effort is computed dynamically based on the assigned resources, and/or its resource assignment units are computed dynamically based on the provided effort.

Changes to the effort will cause assignment units recalculation.

Changes to the assignments will cause recalculation of the effort.

NOTE
When a work item is set to "fixed duration" (and not effort-driven), removing all assigned resources will automatically set the effort to zero.

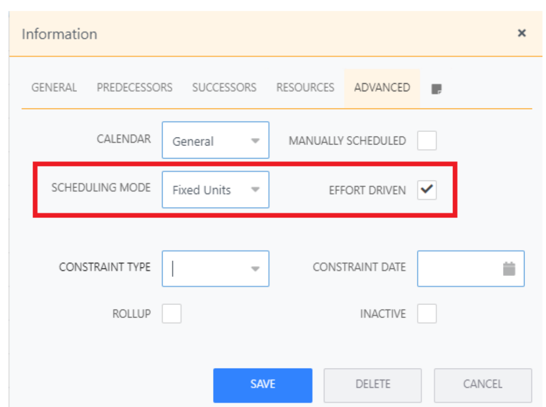
This video demonstrates how the Fixed Duration / Non Effort Driven scheduling mode functions in the work plan.

https://player.vimeo.com/video/728897951

Fixed Units / Effort Driven

In this mode, tasks are set to the **Fixed Units** scheduling mode with the **Effort Driven** setting on.

NOTE
Calculations provided by this mode work only if the event has at least one resource assigned.

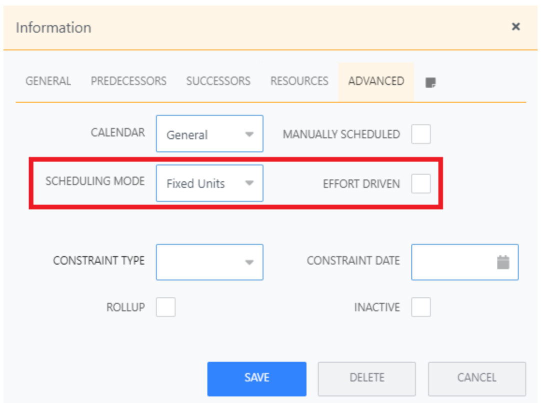


This means that the task assignment units and effort are are provided by the user. Duration is calculated by OnePlan. So, tasks will recalculate duration if there are changes to the units.

Fixed Units / Non Effort Driven

In this mode, tasks are set to the **Fixed Units** scheduling mode with the **Effort Driven** setting off.

NOTE
Calculations provided by this mode work only if the event has at least one resource assigned.



This means the task has fixed assignment units, but its duration is computed dynamically based on the provided effort, and/or its effort is computed dynamically based on the provided duration.

Changes to the duration will cause recalculation of the effort.

Changes to the effort will cause recalculation of the duration.

This video demonstrates how the Fixed Units / Non Effort Driven scheduling mode functions in the work plan.

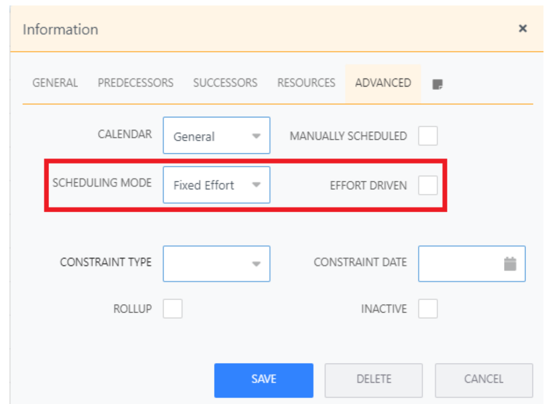
https://player.vimeo.com/video/728922166

Fixed Effort / Non Effort Driven

In this mode, tasks are set to the **Fixed Effort** scheduling mode with the **Effort Driven** setting off.

IMPORTANT
Do not enable the **Effort Driven** setting in this mode.

NOTE
Calculations provided by this mode work only if the event has at least one resource assigned.



This means the task has a fixed effort, but its duration is computed dynamically based on the provided assignment units. and/or its assignment units are computed dynamically based on the provided duration.

Changes to the units will cause recalculation of the duration. The more resources that are assigned to the task, the less the duration will be.

Changes to the duration will cause recalculation of the units.

This video demonstrates how the Fixed Effort / Non Effort Driven scheduling mode functions in the work planner.

https://player.vimeo.com/video/728934946

Normal / Non Effort Driven

The task is scheduled based on information about its start / end dates. The effort (work hours) and assignment units (percentage usage of the resource assigned) are not calculated in this mode.

> **IMPORTANT**
>
> Do not enable the **Effort Driven** setting in this mode.

> **IMPORTANT**
>
> In most cases, do not use this scheduling mode. The normal scheduling mode is intended to be used if you are using the work plan to build out a backlog or task list, or if you are importing data into OnePlan from another scheduling tool like Microsoft Project, where the work is being managed.

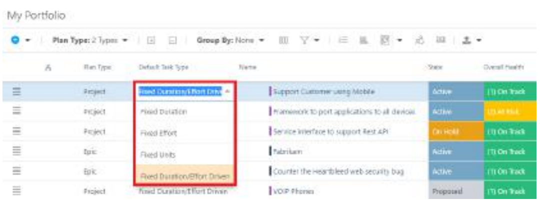
Set Default Task Type at the Plan Level

This article explains how to set the default task type for your work plan at the plan level. This means that every new task created in the work plan will have the set default task type.

You can change this at the individual task level if necessary. See Set the Scheduling Mode (Task Type) at the Task Level [171].

See Scheduling Mode (aka Task Type) [167] for information about how each task type functions in the work planner.

In the Portfolios page, you may add the field Default Task Type to your view. Then, select the default task type for your plan. If the Default Task Type field is not available, ask your administrator to add it to your OnePlan group.



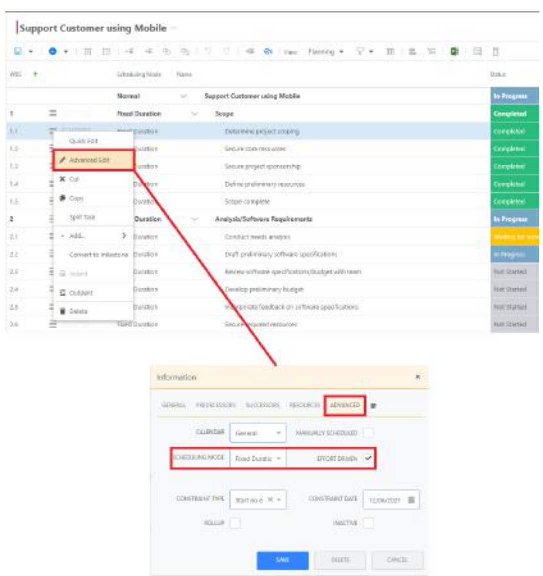
You may also set the Default Task Type on the Plan Details form or Quick Edit form, if the field has been added to your form.

Set the Scheduling Mode (Task Type) at the Task Level

This article explains how to set the scheduling mode for individual tasks in the work planner.

See Scheduling Mode (aka Task Type) [167] for information about how each scheduling mode functions in the work planner.

1. Click on the **Quick Edit** menu. Go to **Advanced Edit > Advanced**.
2. In the **Scheduling Mode** field, select the desired scheduling mode from the drop down.
3. *Optional*. Check the **Effort Driven** check box to enable effort driven scheduling.
4. Click **Save**.



Constraints

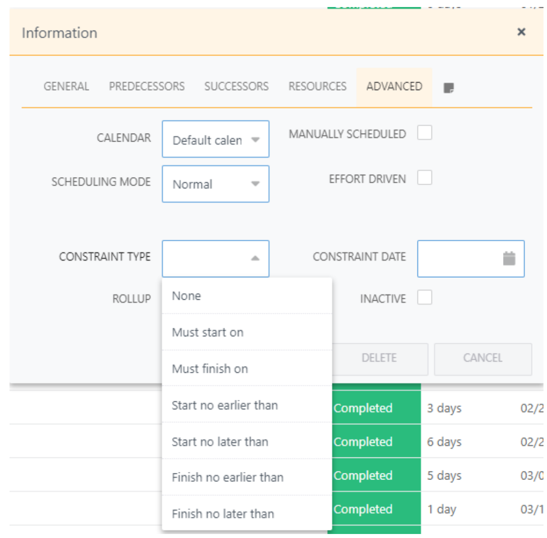
A constraint defines the schedulable date range for a task. The date range is created by the constraint date and constraint type. The constraint type restricts the event start / end dates to be not earlier than, not later than or equal to the provided constraint date.

OnePlan constraint types include:

- **Must start on**: the task must start on the date provided.
- **Must finish on**: the task must end on the date provided.
- **Start no earlier than**: the task has to start on or after the date provided. Used in forward scheduled projects.
- **Start no later than**: the task has to start before (or on) the date provided. Used in backward scheduled projects.
- **Finish no earlier than**: the task has to finish on or after the date provided. Used in forward scheduled projects.
- **Finish no later than**: the task has to finish before (or on) the date provided. Used in backward scheduled projects.

To set up constraints:

1. Go to the task contextual menu > **Advanced Edit** > **Advanced**.
2. Select the constraint type from the **Constraint Type** menu.
3. Set the constraint date in the **Constraint Date** field.
4. Click **SAVE**.



Task Dependencies

This article explains task

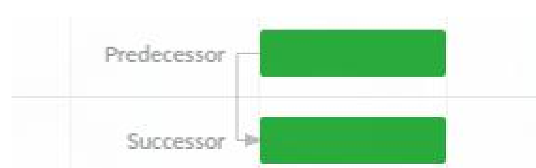
dependencies in the OnePlan work planner.

When an scheduled task changes, its linked tasks will be rescheduled automatically. In forward scheduled projects, successors react to changes made in their predecessors.

How dependent tasks update is based on the dependency type:

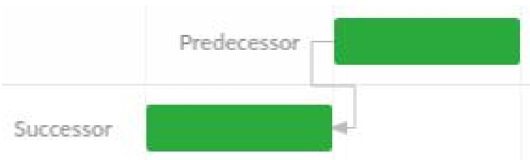
- **Finish-to-Start**: a successor task cannot have a start date before the end date of the predecessor task.

- **Start-to-Start**: a successor task cannot have a start date before the start date of the predecessor task.



- **Finish-to-Finish**: a successor task cannot have an end date before the end date of the predecessor task.

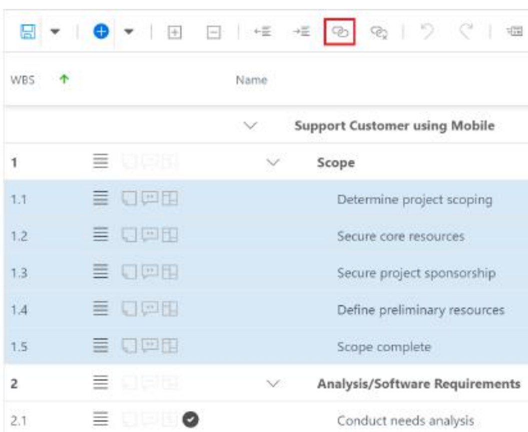
- **Start-to-Finish**: a successor task cannot have an end date before the start date of the predecessor task.



Set Task Dependencies

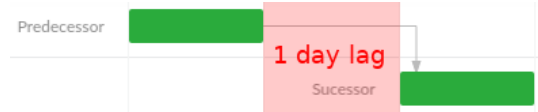
To set task dependencies in the work planner:

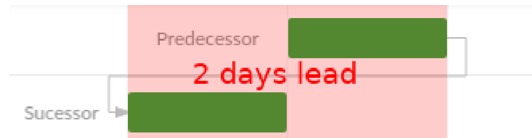
1. Select the desired tasks. You can hold down the CTRL key on your keyboard and select multiple tasks at once.
2. Click the **Link** icon to set dependencies between the selected tasks. The default dependency type is **Finish to Start**.



Set Lead and Lag

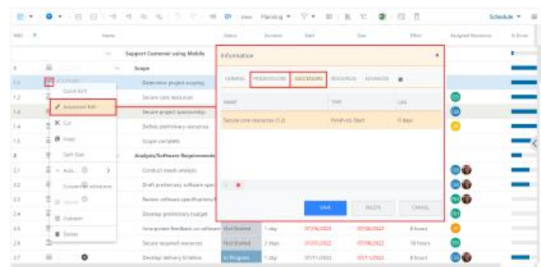
You can also set a lag or lead value for task dependencies. In OnePlan, the lag value defaults to days. Lag will delay a succeeding event by the set number of days. Lead is a negative lag value (e.g. -2 days), and will accelerate the succeeding event by the set number of days.



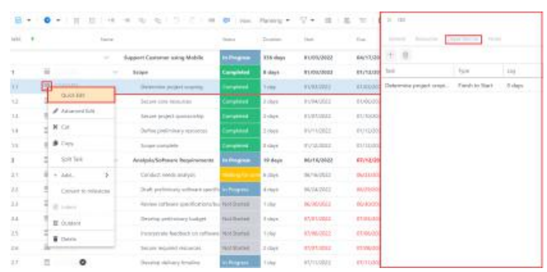


To set up or edit the dependency types and lag:

1. Go to the task contextual menu > **Advanced Edit** > **Predecessors** or **Successors**.



OR go to the task contextual menu > **Quick Edit** > **Dependency**.

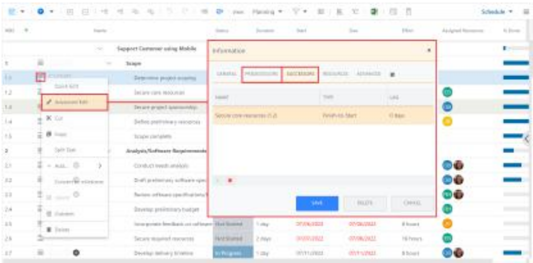


2. In the **Lag** field, select the lag (a positive value) or lead (a negative value) time (in days).
3. Click **Save**.

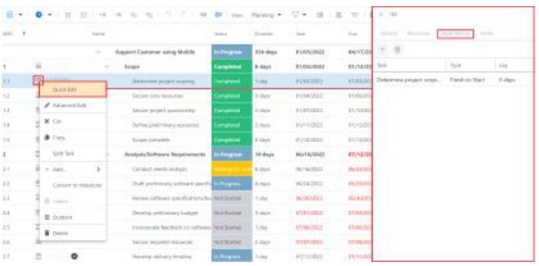
Edit Task Dependencies

To edit task dependencies:

1. Go to the task contextual menu > **Advanced Edit** > **Predecessors** or **Successors**.



OR go to the task contextual menu > **Quick Edit** > **Dependency**.

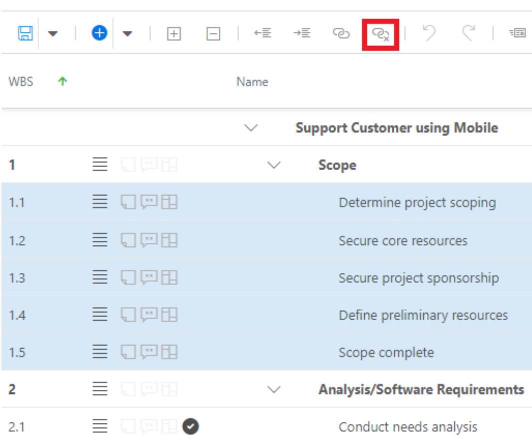


2. Update the dependency **Name**, **Type**, or **Lag** fields.
3. Click **Save**.

Remove Task Dependencies

To remove dependencies between tasks:

1. Select the desired tasks. You can hold down the CTRL key on your keyboard and select multiple tasks at once.
2. Click the **Unlink** icon to remove any dependencies between the selected tasks.



Task hierarchy

When scheduling tasks, the scheduling engine takes the task hierarchy into account following these two principles:

- Each task inherits its parent (summary) task restrictions (dependencies and constraints).
- A summary task start date and end date should match the minimum start date and maximum end date of its children respectively. The summary task effort equals the sum of the effort of all its children. The summary task % completed value equals the completed duration divided by the total duration of all children.

The scheduling engine recalculates summary task when their children are updated. Further, children tasks will react to changes to constraints and dependencies of their parents.

Grid options - Show Sprints

This article explains how to enable and use the Sprints feature in the Work Plan Grid.

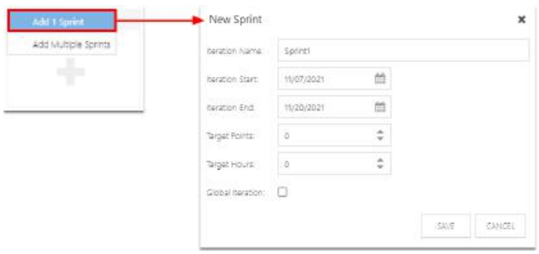
Enable sprints pane

In the Grid Options menu, select **Show Sprints**. The **Sprints** pane will open at the top of the Grid.

Add one sprint

To add a single sprint:

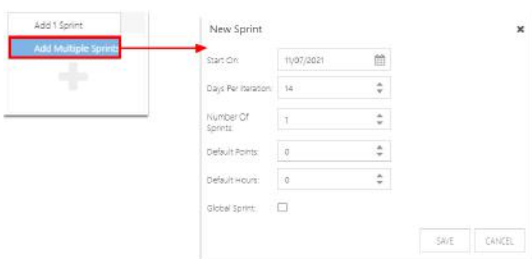
1. Click the **Add** (+) icon. Select **Add 1 Sprint**. The **New Sprint** form will open.
2. Complete the **New Sprint** form:
   - **Iteration Name**: Enter the name of the sprint.
   - **Iteration Start**: Select the sprint start date.
   - **Iteration End**: Select the sprint end date.
   - **Target Points**: Set the target points for the sprint.
   - **Target Hours**: Set the target hours for the sprint.
   - **Global Iteration**: Check the check box if this is a global sprint in your OnePlan environment.
3. Click **SAVE**. The new sprint will show in the **Sprints** pane.



Add multiple sprints

To add a multiple sprints:

1. Click the **Add** (+) icon. Select **Add Multiple Sprints**. The **New Sprint** form will open.
2. Complete the **New Sprint** form:
   - **Start On**: Select the start date of the first sprint.
   - **Days Per Iteration**: Set the number of days in each sprint
   - **Number Of Sprints**: Set the number of sprints you want to add.
   - **Default Points**: Set the default target points for each sprint.
   - **Default Hours**: Set the default target hours for each sprint.
   - **Global Sprint**: Check the check box if these are global sprints in your OnePlan environment.
3. Click **SAVE**.

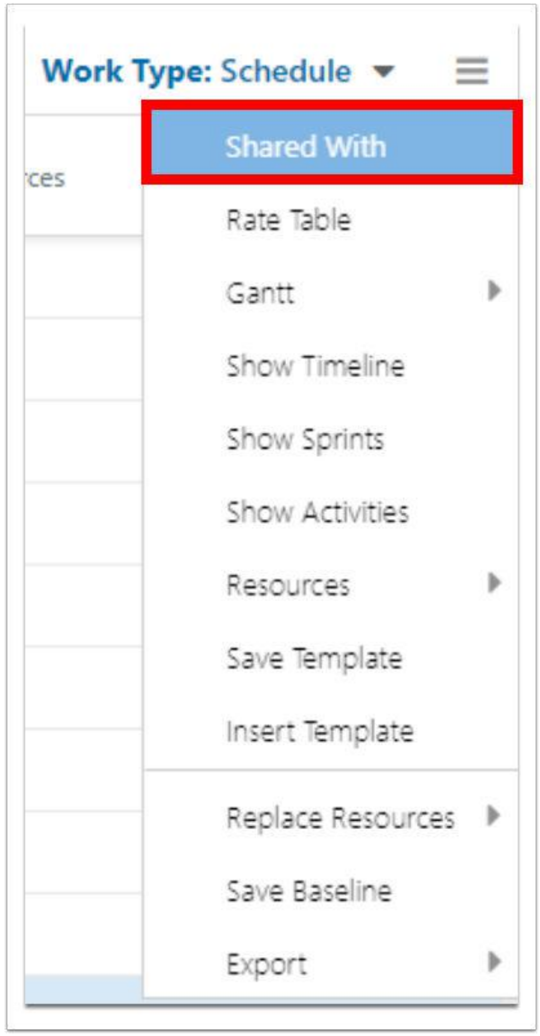


Grid options - Shared With (build plan team)

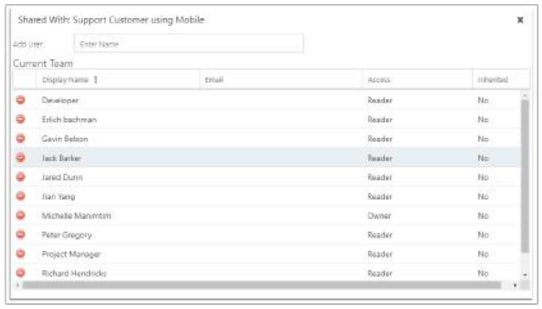
The Shared With window is where you can manage your team. You may add team members and manage the security permissions for your plan.

Open Shared With

Open the Grid Options menu. Select **Shared with**. You may also access the Shared With window via the plan contextual menu from elsewhere (i.e. Portfolios, Plan Menu, etc.).



The plan team shows with each user's Name, Email address and Access level.



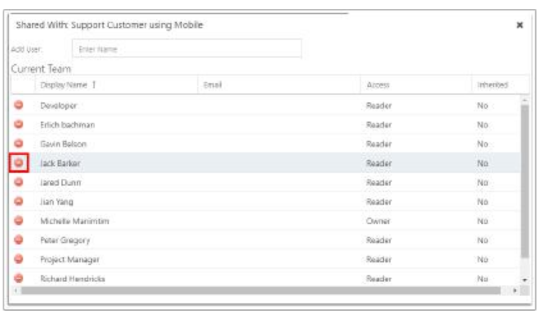
Add User

Add a user to your plan by typing their name into the Add User space. Once you type 3 or more letters, matching users will show for selection based on the directory of users in the Resource Center.

Newly added users will be added to the team as Reader. Adjust the access level as necessary.

Delete User

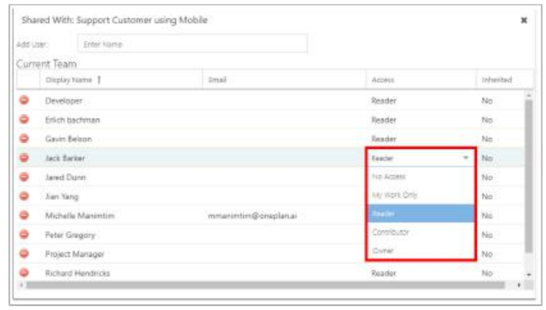
To delete a user, click the red dash the the left of the user. This does not delete the user from OnePlan, just from your plan.



Edit Access

Click in the Access column to change a team member's access level. Select the desired level. (see User Permissions [23])

> **IMPORTANT**
>
> What users are able to access and do with shared plans is dependent on the plan permissions you set, and their OnePlan environment permissions. Higher user permissions will outweigh and restrictions set on the plan level. See OnePlan Plan Permission Hierarchy [83] for details on what a user can expect.



Create Work Plan Notifications

This article explains how to create Work Plan notifications from the OnePlan Work Planner.

Work Plan notifications are separate from general OnePlan notifications and can be configured by plan owners directly from their plans.

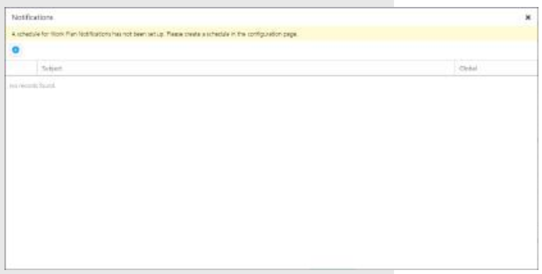
Create a Work Plan Notification

To configure Work Plan notifications:

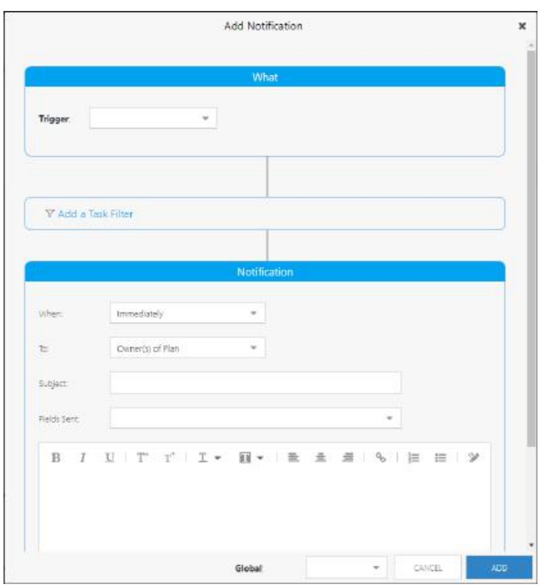
1. From a plan's Work Plan List view, click the Grid Options menu > **Notifications**. The **Notifications** form will open. If there are already notifications configured for this plan, or there are global Work Plan notifications configured, they will be listed on this screen.

NOTE

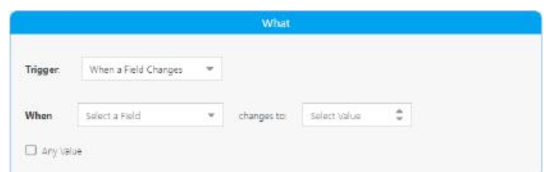
If you are configuring task notifications for the very first time, you may receive the warning message shown in the image below stating "A schedule for Work Plan Notifications has not been set up. Please create a schedule in the configuration page". Your OnePlan administrator needs to configure and enable the Task Notification schedule in the OnePlan configuration page.



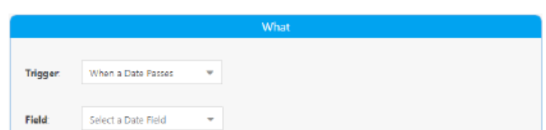
2. Click **Add Notification**, and the **Add Notification** form will open.



3. Complete the **Add Notification** form.
   a. Complete the **What** section of the form.
      i. Select a trigger from the **Trigger** drop-down. Options include **When a Field Changes** or **When a Date Passes**. The form changes dynamically based on your choice.
      ii. If you select **When a Field Changes**, two additional fields and a check box will appear.
         - First, select a field from the **Select a Field** drop-down. When there are changes to the selected field, a notification will be triggered.
         - Next, set a value in the **Value** field. This field will either be a number field or a drop-down based on the field you selected. This setting will trigger the notification when the field value is set to the selected value.
         - If you want a notification to trigger when the selected field changes at all (you do not care about the value it changes to), leave the **Value** field blank and check the **Any Value** checkbox.



      iii. If you select **When a Date Passes**, one additional field will appear.
         - Select a date field from the **Select a Field** drop-down. When the date in the selected field passes, a notification will be triggered.

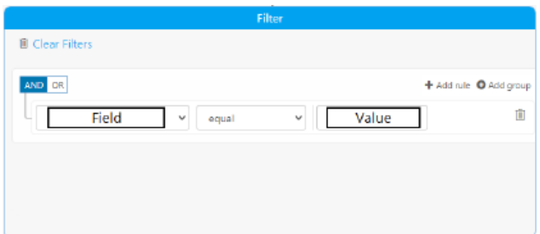


   b. (Optional) add filters to your notification. If you would like to further refine the tasks that will trigger a notification, you can add filters. For example, you only want a notification to trigger when a task is 50% complete and is At Risk.
      i. Select a field to filter on from the drop-down. The filter parameters will

dynamically appear once you select a field.

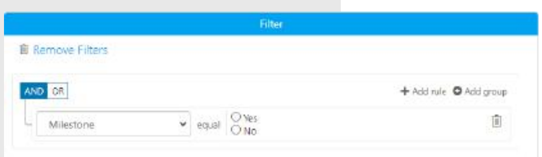
ii. Select an inequality from the drop-down. Options in this drop-down will change based on the field selected, but will always include **Equal** and **Not Equal**.

iii. Select a value to filter from the drop-down. This field will either be a number field or a drop-down based on the field you selected. This setting will filter tasks when a field value is set to the selected value.



NOTE

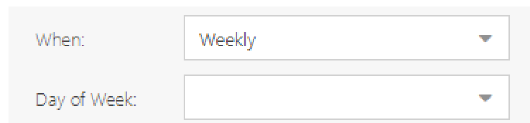
As of December 15, 2023, Work Plan notifications can be filtered based on the milestone field. This is helpful if you only want to trigger a notification on milestones in your work plan.



c. Complete the **Notification** section of the form.

i. Select when the notification will send an email to the set recipients from the **When** drop-down. Options include **Immediately** (will send out a notification once the trigger parameters are met and will only send the notification once), **Daily** (will send out the notification once the trigger parameters are met, and will continue to send out the notification once a day until the task has been updated) and **Weekly** (will send out the notification once the trigger parameters are met, and will continue to send out the notification once a week on the specified day until the task has been updated).

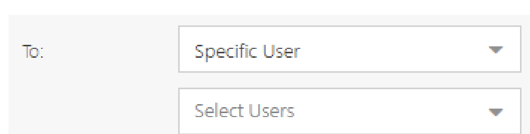
- If you select **Weekly**, the **Day of Week** field will appear. Select the day of the week you want the notification to be sent to the recipients.



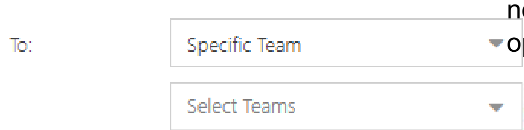
ii. Select the notification recipients from the **To** drop-down. Options include **Owner(s) of Plan** (will send the notification to all users with Owner permissions in the plan's Share With form), **Field** (will send the notification to users based on the Work field selected), **Specific User** (will send the notification to the specific user(s) selected), and **Specific Team** (will send the notification to the users who are part of the selected team(s)).

- If you select **Field**, the **Select Field** field will appear. Select the Work field to set the recipients of the notification. Options here include **Assigned Resources**.

- If you select **Specific User**, the **Select User** field will appear. Select the desired user(s) you want to receive the notification.



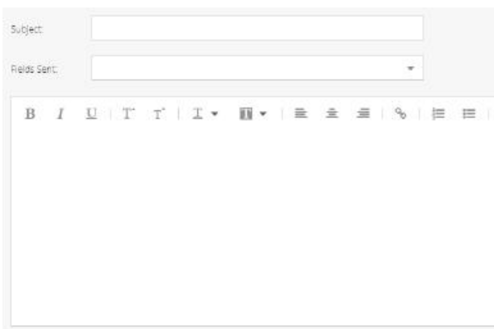
- If you select **Specific Team**, the **Select Team** field will appear. Select the desired team(s) you want to receive the notification.



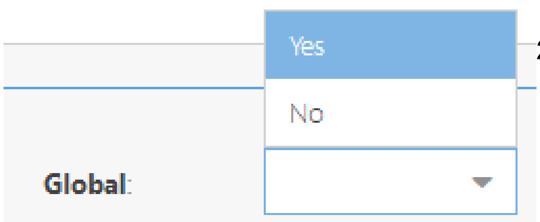
iii. Enter a subject for the notification email.

iv. (Optional) select the Work fields that you would like to include in the notification email. This will append the selected fields and their values to the bottom of the notification email.

v. Draft the body of the notification email.



d. From the **Global** field, select whether the new notification will be a global Work Plan notification or not. If you select **Yes**, the notification will be available across all plans in your OnePlan environment. If you select **No**, the notification will only be available in the current plan.



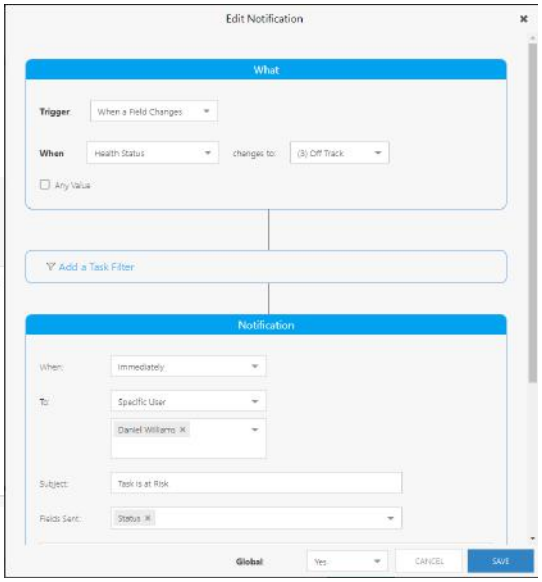
4. Click **Save**. Your new notification is now active.

Edit a Work Plan Notification

To edit an existing Work Plan notification:

1. From a plan's Work Plan List view, click the Grid Options menu > **Notifications**. The **Notifications** form will open.
2. Click the **Edit** icon next to the desired notification. The **Edit Notification** form will open.

3. Update the notification settings as necessary.
4. Click **Save** to save your updates.

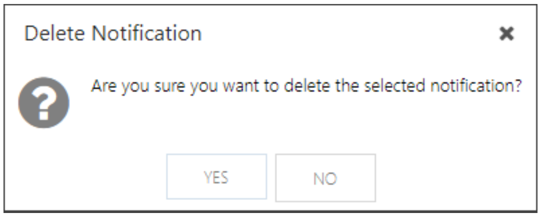


Delete a Work Plan Notification

To delete a Work Plan notification:

1. From a plan's Work Plan List view, click the Grid Options menu > **Notifications**. The **Notifications** form will open.
2. Click the **Delete** icon next to the desired notification. The Delete Notification pop-up will appear.

3. Click **Yes** to delete the notification.



Use Activities in the Work Plan

This article explains how to use Activities in the OnePlan work planner.

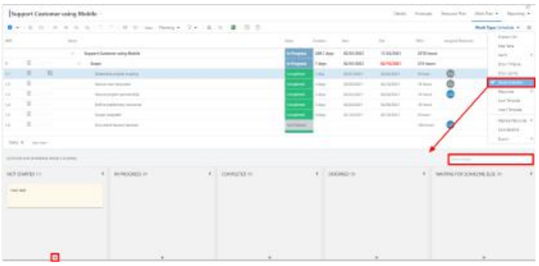
Open the Activities pane to add multiple activities for a selected task. Activities allow for smaller pieces of work to be tracked, that don't need to be a full task in the plan. This allows agile planning of work within the overall plan/schedule.

Video Length - 3:09

https://player.vimeo.com/video/761090855

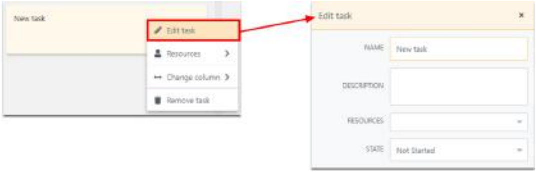
Show Activities

1. Select a task.
2. In the Grid Options menu, select **Show Activities**.
3. The Activities pane opens on the bottom half of the screen.
4. Add a new activity.
   a. Type into the **Add Activity** field, then hit the Enter key.
   b. Click the **Add** icon (+). A new activity card will open in the **NOT STARTED** lane.



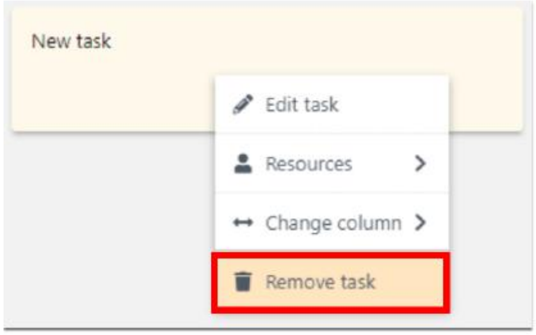
Edit Activities

1. Right click on the desired activity card. Select **Edit task**. The **Edit task** form will open.
2. Update the **Edit task** form.
   - **Name**: Enter the name of the activity.
   - **Description**: Enter a description for the activity.
   - **Resources**: Select resources to assign to the activity.
   - **State**: Select the state the activity is in.



Delete Activities

Right click on the desired activity card and select **Remove task**.



Update the Activity status

Update status by right clicking on the activity card

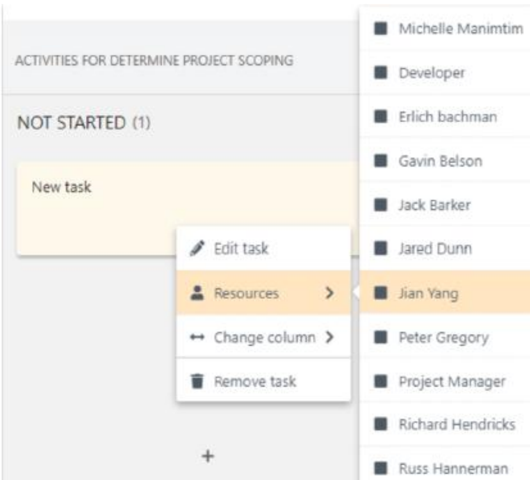
Right click on the desired activity card. Go to **Change column**, and select the desired activity status.

Update status by drag and drop

Select the desired activity card. Drag and drop the card to the desired location.

Assign the Activity to a resource

1. Right click on the desired activity card. Go to Resources.
2. Select the desired resources from the project team to assign to the activity. You can select multiple resources.

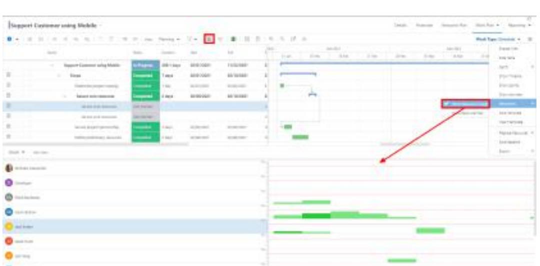


Grid options - Resources

This article explains how to enable and use the Resources options in the Work Plan Grid.

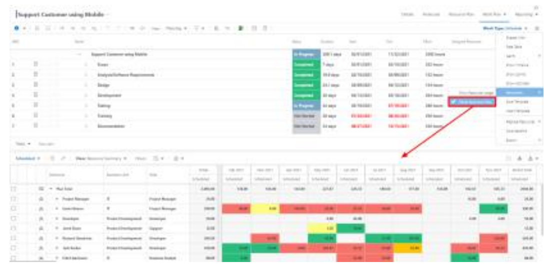
Show Resource Usage

To enable the Resource Usage pane, go to the Grid Options menu. Go to **Resources > Show Resource Usage**. The **Resource Usage** pane will open at the bottom of the Grid. The Gantt chart will also open.



Show Resource Plan

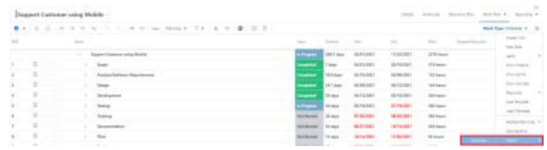
To enable the Resource Plan pane, go to the Grid Options menu. Go to **Resources > Show Resource Plan**. The **Resource Plan** pane will open at the bottom of the Grid.



Grid options - Export

This article explains how to export the Work Plan Grid view to Excel or Microsoft Project XML. You must first select Export. Then, you may select the format you want it to export.

Exporting Work Plan Grid view



When exporting, it will export the visible work items on the page. This allows you to collapse / expand and filter out the work items you don't want in your export.

Export a Work Plan Schedule to Use in Microsoft Project

This article explains how to export a work plan schedule from OnePlan to use in Microsoft Project.

The OnePlan work plan allows users to export the work plan schedule as an XML file that can be imported into Microsoft Project. This allows you to build a schedule in OnePlan, and then import it into Project Desktop to manage the schedule.

Export the Work Plan Schedule

Go to the **Grid Options** menu > **Export** > **Microsoft Project XML**.

See Grid options - Export [181] for more information.

Open the Schedule in Microsoft Project

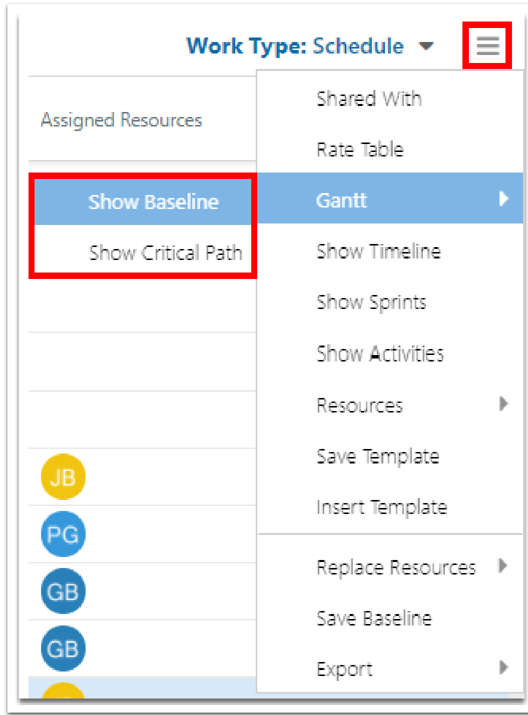
Follow the steps detailed in Opening Project XML Files from Microsoft.

Use the Work Plan Gantt

This article explains how to show the Gantt chart for your plan schedule of tasks. You must first select Show Gantt. Then, you may also select Show Baseline and/or Show Critical Path.

NOTE

The Gantt control requires start and due/finish dates for tasks in order to properly display the Gantt.



Video Length - 1:15

https://player.vimeo.com/video/761090751

Show Gantt

Click the Gnatt icon in the Work Plan Grid header to show the Gnatt.

When the Gantt is shown, three additional icons show on your header. Click the icons to **Zoom In**, **Zoom Out**, **Scroll To** (which will shift the dates to the selected task), or **Zoom Fit**.

Show Baseline or Critical Path

Click the **Options** menu. Go to **Gantt > Show Baseline** to show the baseline in the Gantt chart. Go to **Gantt > Show Critical Path** to show the critical path in the Gantt chart.

Show the Work Plan Critical Path

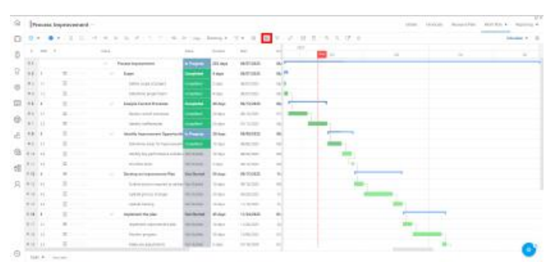
This article explains how to show the work plan critical path in the OnePlan Gantt.

Video Length - 1:22

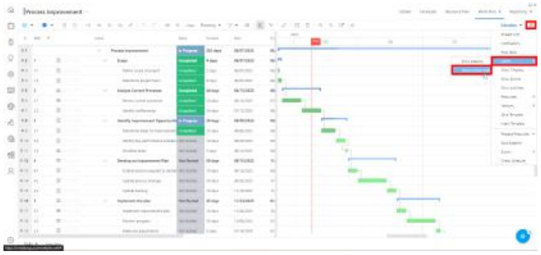
https://player.vimeo.com/video/761090946

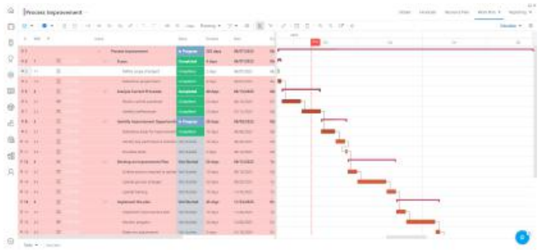
To show the critical path in the work plan:

1. (Optional) Open the Gantt chart view by clicking on the Gantt icon in the work plan header.



2. Open the Grid Options menu, then select **Gantt** > **Show Critical path**. Work items on the critical path for your work plan will be highlighted in red in both the work plan grid and the Gantt chart.





Work Plan Baseline Basics

This article explains the basics of saving baselines of your work plan in OnePlan.

Video Length - 1:46

https://player.vimeo.com/video/761117635

Now that you have worked with your team and stakeholders to create an agree on the Project's schedule. It's time to start executing the plan before you start tracking actual progress against the plan a common best practice is to save a baseline of the original plan.

A baseline is a snapshot of the original project schedule based on the initial understanding of how the project will be delivered by the project team. The reason it's important is because it's like a handshake between the project manager team and stakeholders. Once you have a baseline in place. You can determine how well the project is performing versus the original plan.

Out of the box, OnePlan saves the following five fields for each task to the baseline:

1. **% Done**: % Done tracks percent complete. Remember the percent done in an original baseline should be zero percent because no actual progress is tracked at this point in the schedule.
2. **Start Date**
3. **Finish Date**
4. **Effort**: Effort is typically measured in the estimated hours needed to complete the task.
5. **Remaining Effort**: Remaining effort is how many hours are left once work starts on the tasks. Because there should be no associated actuals when an initial baseline is saved, remaining effort should equal the estimated effort. That way, you can track your actual progress against the original plan to determine how the project is performing at the task level as well as overall project performance.

To save a baseline of your entire project schedule (or all of the tasks in the schedule), See Save a Baseline for All Tasks [183] for instructions and more information.

To save a baseline of a few selected tasks, see Save a Baseline for Selected Tasks [184] for instructions and more information.

Save a Baseline for All Tasks

This article explains how to save a baseline for all tasks in your work plan schedule.

Video Length - 3:10

https://player.vimeo.com/video/761117687

To save the Baseline:

1. Go to the grid options menu and select **Save Baseline**. The **Save Baseline** form will open.
2. Complete the **Save Baseline** form.
   - **Baseline Method**: Select **All Tasks**.
   - **Baseline**: Select **Baseline (0)**.

> **NOTE**
> OnePlan allows you to save up to 11 baselines.

> **NOTE**
> Baseline (0) is where one plan captures and stores data used for reporting purposes. So it's really important that when you save your Baseline, save Baseline (0).

> **NOTE**
> The other baselines are important because they are then used for historical purposes to compare the project performance against the current Baseline.

3. Click **Save**. You will be asked if you want to save the current Baseline. Click, **Yes**, and then OnePlan saves the Baseline.

> **NOTE**
> We also recommend saving an additional baseline (Baseline (1) in this example). Baseline (1) now becomes something that you can save for historical purposes. Additional baselines give you that history that you'll be able to save, should you encounter situation where you need to rebaseline and then at that point you would use Baseline (0) to be the baseline for taking another snapshot of your schedule.

To show your saved baseline in the Gantt:

- Go to the grid option menu and select **Gantt** > **Show Baseline**. The Gantt will open. You should see gray bars beneath the original Gantt bars and that show you that Baseline (0) has been captured.

Save a Baseline for Selected Tasks

This article explains how to save a baseline for selected tasks in your work plan schedule.

Video Length - 1:59

https://player.vimeo.com/video/761117560

A situation where you may want to baseline selected tasks is if, for example, a new project scope was identified by your team that needed to be added to the project schedule, thus adding a couple new tasks. These tasks have been added and networked into the schedule with resources associated with it notice that because there is no baseline for these tasks. There are no baseline start dates or due dates or baseline effort. Rather than baselighting the entire schedule again, there is an opportunity to baseline selected tasks.

To baseline selected tasks:

1. Select the desired tasks from the work plan list. You can select multiple tasks by holding down the CTRL key and clicking.
2. Go to the grid option menu ≡ > **Save Baseline**. The **Save Baseline** form will open.
3. Complete the **Save Baseline** form.
   - **Baseline Method**: Select **Selected Tasks**.
   - Baseline: Select **Baseline (0)**.

> **NOTE**
> Saving the selected tasks to Baseline (0) will add these tasks to the original baseline.

> **NOTE**
> Baseline (0) is where one plan captures and stores data used for reporting purposes. So it's really important that when you save your Baseline, save Baseline (0).

NOTE
OnePlan allows you to save up to 11 baselines.

NOTE
The other baselines are important because they are then used for historical purposes to compare the project performance against the current Baseline.

4. Click **Save**. Then click **Yes** in the popup to save the baseline. The selected tasks have been added to the original Baseline (0).

NOTE
We also recommend saving an additional baseline (Baseline (2) in this example). Baseline (2) now becomes something that you can save for historical purposes. Additional baselines give you that history that you'll be able to save, should you encounter situation where you need to rebaseline and then at that point you would use Baseline (0) to be the Baseline for taking another snapshot of your schedule.

Use the Work Plan Timeline

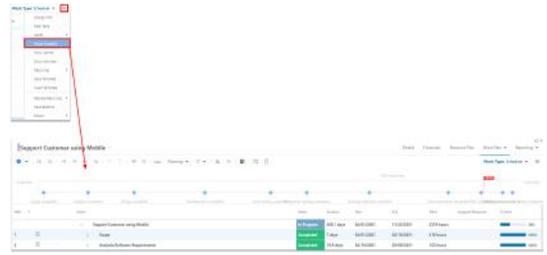
This article describes how to use the timeline feature of the OnePlan work plan.

The following video provides a demonstration of the OnePlan timeline feature, including why you would use it, and how to use it.

https://player.vimeo.com/video/730008576

Open the Timeline

1. Click the **Grid Options** menu.
2. Select Show Timeline. The plan timeline will open in the work plan grid.



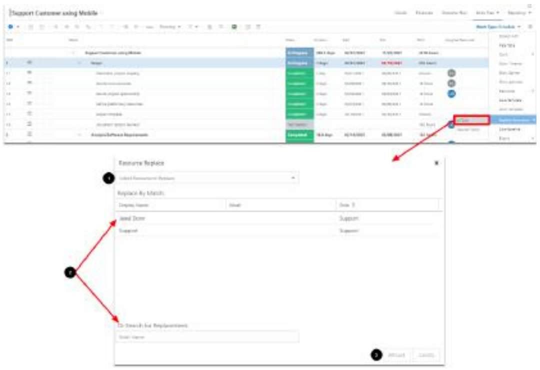
Add Items to the Timeline

1. Add the **Show in timeline** column to the work plan grid. See Add and remove columns [160] for instructions to add a column.
2. In the **Show in timeline** column in the work plan, check the check box next to the desired tasks to add them into the timeline. You should see the timeline populate with tasks.

Grid options - Replace Resources

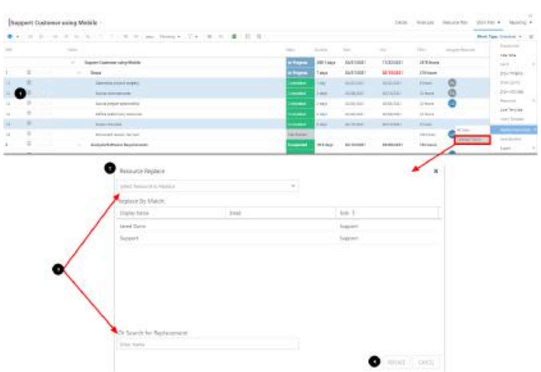
Replace a resource across all tasks in a plan

1. Open the **Grid Options** menu. Go to **Replace Resources** > **All Tasks**. The Resource Replace form will open.
2. Complete the Resource Replace form.
   a. Select a resource to replace from the **Resource to Replace** drop down.
   b. Select a replacement resource:
      - **Replace By Match**: Select a resource from the list.
      - **Search for Replacement**: Search for and select the name of a specific resource.
3. Click **REPLACE**.



Replace a resource in selected tasks

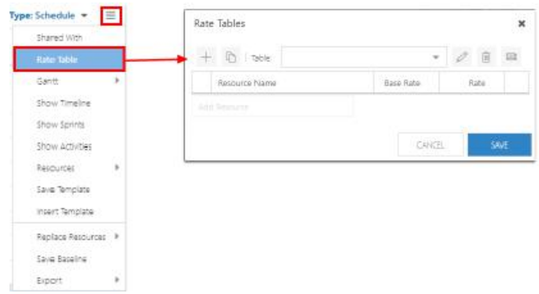
1. Select the desired work items from the Plan Grid. You can select multiple work items by holding down the CTRL key.
2. Open the **Grid Options** menu. Go to **Replace Resources** > **Selected Task(s)**. The Resource Replace form will open.
3. Complete the Resource Replace form.
   a. Select a resource to replace from the **Resource to Replace** drop down.
   b. Select a replacement resource:
      - **Replace By Match:** Select a resource from the list.
      - **Search for Replacement**: Search for and select the name of a specific resource.
4. Click **REPLACE**.



Grid options - Rate Table

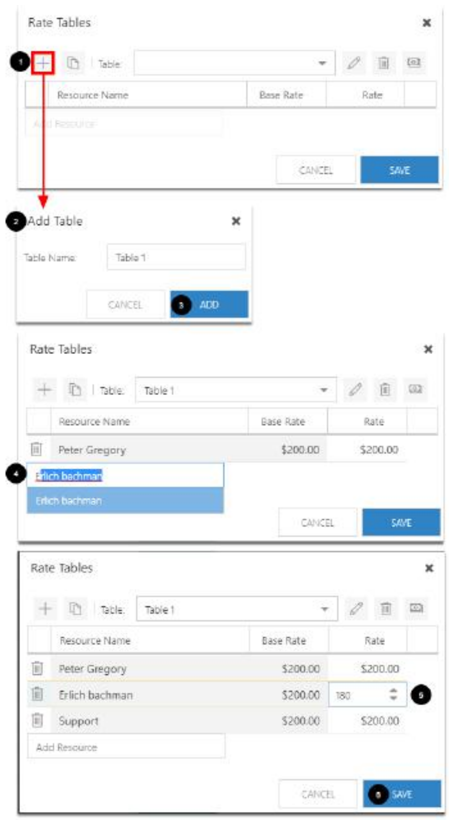
This article explains how to create, edit, delete, and apply plan-level rate tables.

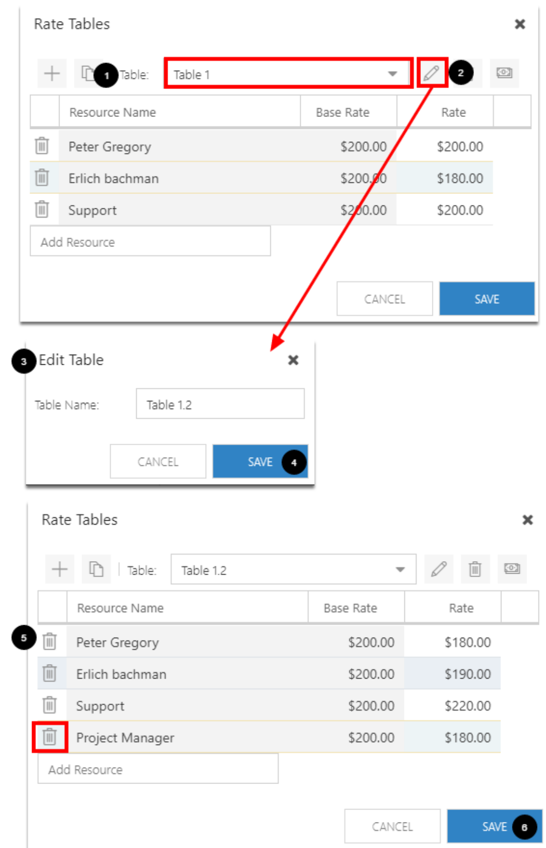
Open the Grid Options menu. Select **Rate Table**. The Rate Tables form will open.



Create a rate table

1. Click the Add (+) icon. The **Add Table** form will open.
2. Complete the Add Table form.
   - **Table Name:** Enter the name of the new rate table.
3. Click **ADD**.
4. Add resources to the rate table.
   - Search for a resource by entering the role or name into the Add Resource field. Search results will appear under the field. Select the desired resource.
5. Edit the **Rate** for each resource as necessary.
   - Click the Rate field for the desired resource and enter the new rate.
6. Click **SAVE**.



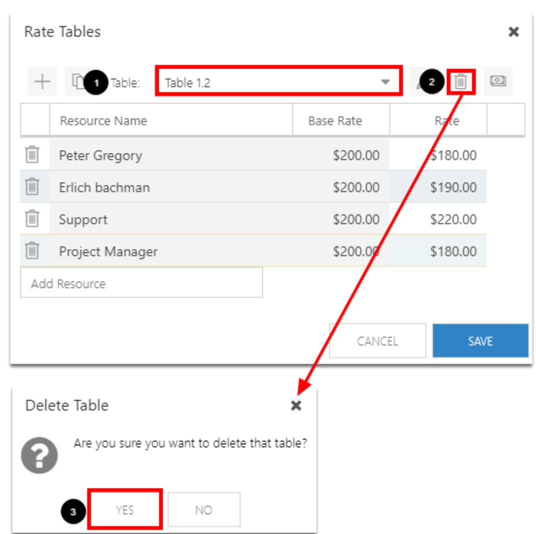


Edit a rate table

1. Select a rate table from the **Table** drop down.
2. Click the Edit icon. The **Edit Table** form will open.
3. Complete the **Edit Table** form.
   - **Table Name:** Edit the name of the rate table.
4. Click **SAVE**.
5. Update the resources and resource Rates as necessary.
   NOTE: To remove a resource, click the **Delete** icon next to the desired resource.
6. Click **SAVE**.

Delete a rate table

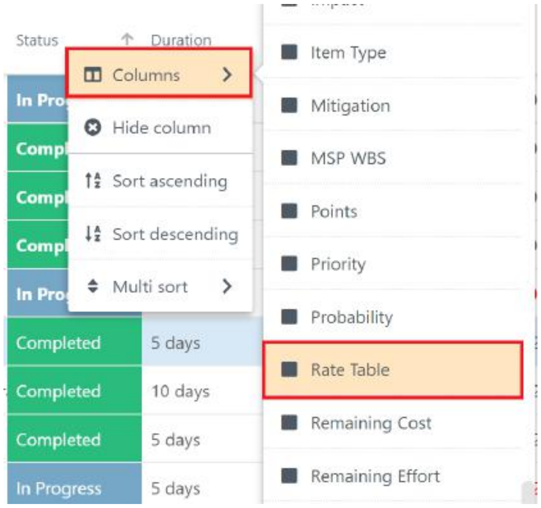
1. Select a rate table from the Table drop down.
2. Click the **Delete** icon.
3. Confirm the deletion.



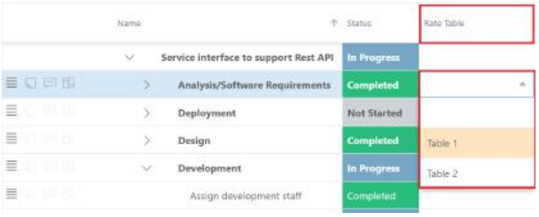
Apply a rate table

Once you have created rate tables, you can apply those new rates to various tasks within a project.

1. Right click on any column header in the grid.
2. Go to **Columns** and select **Rate Table**. The **Rate Table** column will be added to the far right of the grid.



3. (*Optional*) Drag and drop the **Rate Table** column to the desired location.
4. Within the **Rate Table** column, select the rate table you would like to apply to the tasks.



Work Plan Versioning Overview

This article gives an overview of the Versioning function of the OnePlan work plan.

Video Length - 1:08

https://player.vimeo.com/video/760017411

Versioning in OnePlan is the creation and management of multiple work plans, all of which have the same general structure and function, but are improved, upgraded, or customized. Versioning safeguards from you losing your work, allows you to experiment and return to previous versions.

With the versioning function, you can save a new version of your plan, open a previous version of your plan, and restore an earlier version of your plan you are working on (which will overwrite your current work with the selected version). When you create a version of your work plan, the work plan structure, resources, tasks, and task data are saved.

Versioning in the Work Plan Grid allows you to save up to 10versions of your work plan, so it is best practice to save versions when major changes have been made to the work plan.

Save Work Plan Versions

This article explains how to save a version of your work plan.

Video Length - 00:30

https://player.vimeo.com/video/760017454

To save a version of your work plan:

1. Click on the Hamburger menu. Go to **Versions** > **Save Version**. The **Save Version** form will open.
2. Name the version and click **Save Version** to save the version.

Version Naming Best Practices

We recommend that you include the Date, project name, major version number in the name when saving a version.

Open Work Plan Versions

This article describes how to open a previous version of your work plan.

Video Length - 00:43

https://player.vimeo.com/video/760017482

To open a previously saved version:

1. Click on the Hamburger menu. Go to **Versions** > **Open Version**. The **Open Version** form will open.
2. Select the desired version and select **Open Version** to open the version in the Work Plan Grid.

3. A notification will appear across the top of the Work Plan Grid detailing the version you are editing.

Restore Work Plan Versions

This article describes how to restore a previous version of your work plan.

Video Length - 00:33

https://player.vimeo.com/video/760017543

To restore a previous version of the Work Plan Grid:

1. First, follow Open Work Plan Versions [188] to open your desired work plan version.
2. Click on the Hamburger menu. Go to **Versions** > **Restore Version**.
3. Click **Yes** on the Version pop up to confirm the restore.

Delete Work Plan Versions

This article describes how to delete a saved version of your work plan.

Video Length - 00:36

https://player.vimeo.com/video/760017765

To delete a saved version of your work plan:

1. Click on the Hamburger menu. Go to **Versions** > **Open Version**. The **Open Version** form will open.
2. Click **Delete** next to the version you would like to delete.

Work Plan Templates Overview

This article provides an overview of OnePlan work plan templates.

Video Length - 00:54

https://player.vimeo.com/video/760321716

In general, a template is anything that determines or serves as a pattern. In OnePlan, you can save the structure of a work plan to use when creating other new work plans. This is especially helpful if your projects generally follow a similar path, and thus require a standard work plan structure.

Plan templates can be used across all work types.

Plan templates can only be saved and imported from the **Schedule** work type view. When you save a template from the **Schedule** work type view, all work type items in all work types in the plan will be saved. Timesheet data will not be saved.

There do not need to be any items in the **Schedule** work type to save a new template.

Save a template

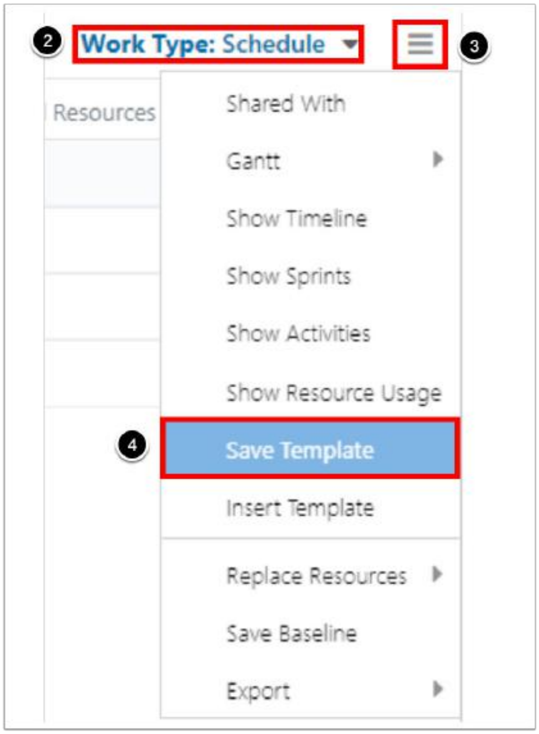
https://player.vimeo.com/video/760321808

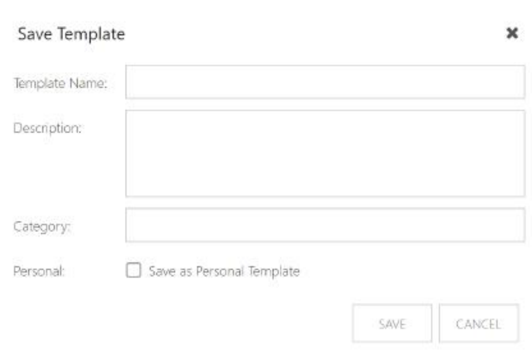
To save a template:

1. Configure the work types as desired.
2. Go to the **Schedule** work type view.
3. Click the hamburger menu next to the **Work Type** menu.
4. Click **Save Template**. The **Save Template** form will open.
5. Complete the **Save Template** form.
   - **TemplateName**: Enter the template name.

     > **NOTE**
     > It is best practice to include "template" in the name of your templates. This makes it easier to locate in the Bulk Plan Cleanup tool if you would like to delete the template. See Delete a template.

   - **Description**: Enter a description for the template.
   - **Category**: Enter a catgory tag to make searching for the template easier.
   - **Personal**: Check the check box if the template is a personal template.
6. Click **Save** to save the new template.





Insert a Work Plan Template

This article describes how to insert a work plan template into your Work Planner.

NOTE

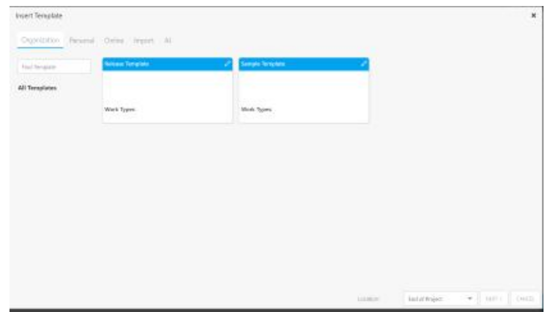
When you insert a template, the rollup / plan summary calculations will run automatically.

To insert a template into the Work Planner:

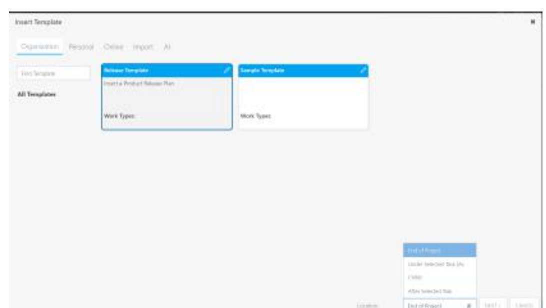
1. Go to the **Schedule** work type view.
2. **Grid OptionsInsert Template**. The **Insert Template** window will open.

Insert an Organization Template

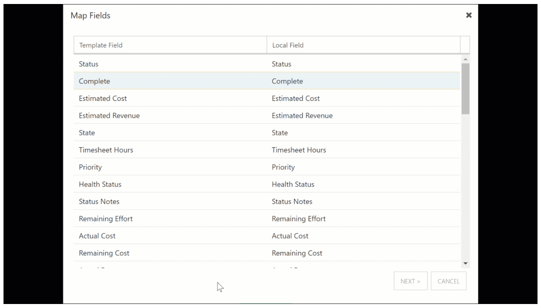
If your organization has created a set of standardized templates for you to use, you can find those in the **Organization** tab of the **Insert Template** form.



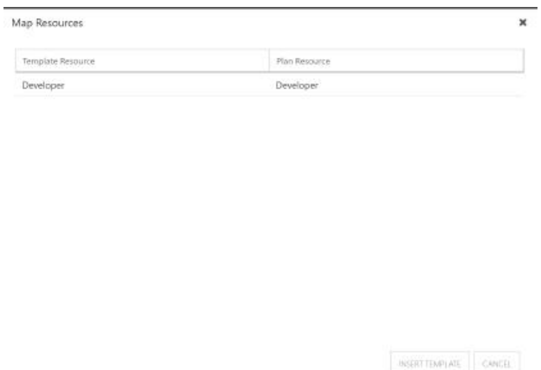
1. Search for and select the template you would like to use.
2. Select where you would like to insert the template into your work plan from the **Location** drop-down menu. Options include **End of Project**, **Under Selected Task (As Child)**, or **After Selected Task**.



3. Click **Next**.
4. If applicable, review and update field mappings from the template to the corresponding fields in your existing work plan.



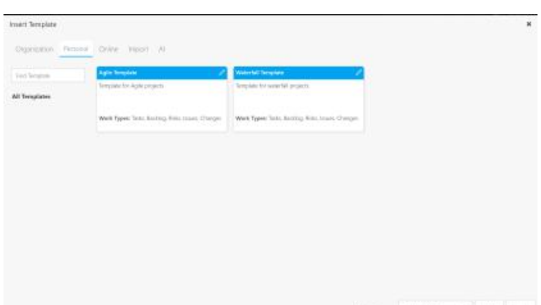
5. Click **Next**.
6. If applicable, review and update resource mappings from the template to the corresponding resources in your existing work plan.



7. Click **Insert**. The work plan template will append to your work plan.

Insert a Personal Template

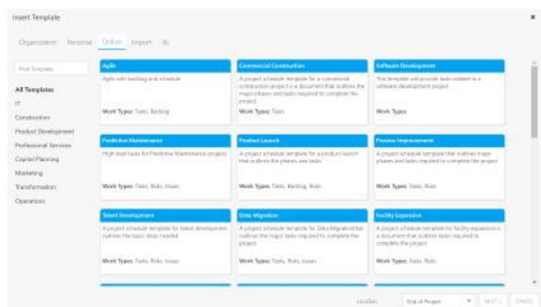
If you have created and saved work plan templates for your own use, you can fond those templates in the **Personal** tab of the **Insert Template** form.



1. Search for and select the template you would like to use.
2. Select where you would like to insert the template into your work plan from the **Location** drop-down menu. Options include **End of Project**, **Under Selected Task (As Child)**, or **After Selected Task**.
3. Click **Next**.
4. If applicable, review and update field mappings from the template to the corresponding fields in your existing work plan.
5. Click **Next**.
6. If applicable, review and update resource mappings from the template to the corresponding resources in your existing work plan.
7. Click **Insert**. The work plan template will append to your work plan.

Insert an Online Template

OnePlan offers a robust library of work plan templates that you can access from the **Online** tab of the **Insert Template** form.



1. Search for and select the template you would like to use.
2. Select where you would like to insert the template into your work plan from the **Location** drop-down menu. Options include **End of Project**, **Under Selected Task (As Child)**, or **After Selected Task**.
3. Click **Next**.
4. If applicable, review and update field mappings from the template to the corresponding fields in your existing work plan.
5. Click **Next**.
6. If applicable, review and update resource mappings from the template to the corresponding resources in your existing work plan.
7. Click **Insert**. The work plan template will append to your work plan.

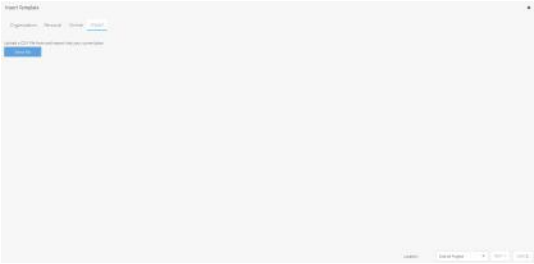
Import a Template

If you want to import a OnePlan work plan template file that someone has shared with you, you can do that from the **Import** tab of the **Insert Template** form.

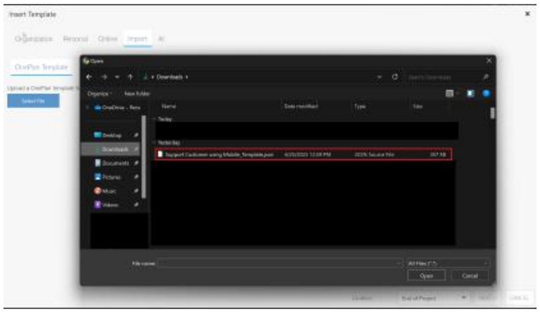
1. Select the type of template you would like to import. Options include **OnePlan Template** (use if you exported a OnePlan work plan template JSON file), or **CSV** (use if you have a work plan template in a spreadsheet format). Then click **Next**.

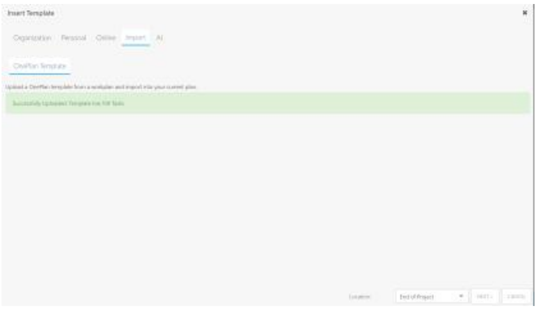
Figure 1. Import a OnePlan Template Screen

Figure 2. Import a CSV Template Screen



2. Click **Select File**. A file browser will open.
3. Search for and select the desired work plan template file. Then click **Open**. This will upload the template into OnePlan.



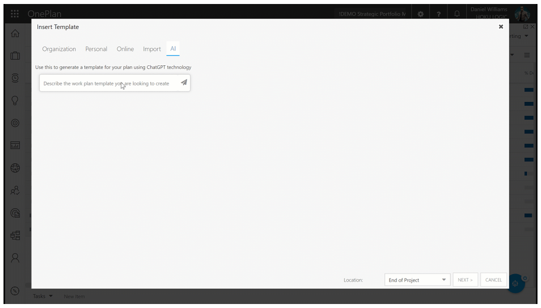


4. Once the template has been successfully uploaded, select where you would like to insert the template into your work plan from the Location drop-down menu. Options include **End of Project**, **Under Selected Task (As Child)**, or **After Selected Task**.
5. Click **Next**.
6. If applicable, review and update field mappings from the template to the corresponding fields in your existing work plan.
7. Click **Next**.
8. If applicable, review and update resource mappings from the template to the corresponding resources in your existing work plan.
9. Click **Insert**. The work plan template will append to your work plan.

Generate a Template with AI

You can use Sofia, OnePlan's AI helper, to quickly create new work plan templates from the **AI** tab of the **Insert Template** form.

1. In the text field, describe the type of template you are looking for, and OnePlan AI will suggest possible options. For example, you could enter "I need a software development template for building an e-commerce platform," and the AI will generate work plan template options for you to use.



2. After the template has been generated, review the template. Click **Keep** to use the template. Or click **Try Again** to generate a new template until you find a template you want to use.
3. Select where you would like to insert the template into your work plan from the Location drop-down menu. Options include **End of Project**, **Under Selected Task (As Child)**, or **After Selected Task**.
4. Click **Next**.
5. If applicable, review and update field mappings from the template to the corresponding fields in your existing work plan.
6. Click **Next**.
7. If applicable, review and update resource mappings from the template to the corresponding resources in your existing work plan.
8. Click **Insert**. The work plan template will append to your work plan.

Import Work Plan Templates

This article explains how to import templates into your OnePlan work plan template library.

You can upload Excel work plan templates (CSV), or OnePlan work plan templates (JSON) to use as a base for building your OnePlan work plans. The import function can be especially helpful if you need to import work items from another system instead of manually creating them.

IMPORTANT

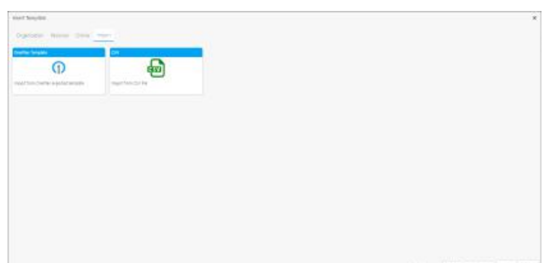
For the CSV import, most field types can be imported (text, choice, date, etc). You can also import resource assignments. Currently, you can only import a **flat list of tasks** (no hierarchy or predecessors/successors).

NOTE

When importing dates, dates should be in the YYYY-MM-DD format. If they are not in this format, you will recieve the following error: 'String was not recognized as a valid DateTime'.

Import a Template

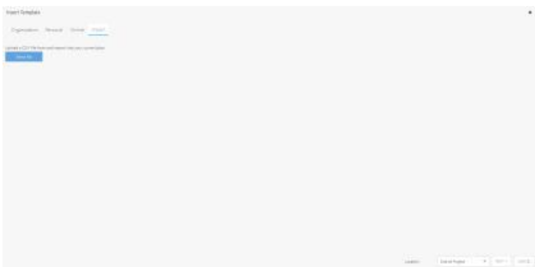
If you want to import a OnePlan work plan template file that someone has shared with you, you can do that from the **Import** tab of the **Insert Template** form.



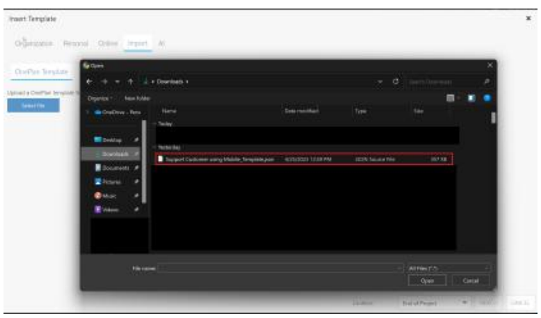
1. Select the type of template you would like to import. Options include **OnePlan Template** (use if you exported a OnePlan work plan template JSON file), or **CSV** (use if you have a work plan template in a spreadsheet format). Then click **Next**.

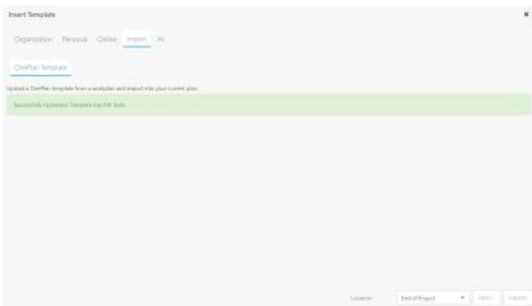
Figure 3. Import a OnePlan Template Screen

Figure 4. Import a CSV Template Screen



2. Click **Select File**. A file browser will open.
3. Search for and select the desired work plan template file. Then click **Open**. This will upload the template into OnePlan.





4. Once the template has been successfully uploaded, select where you would like to insert the template into your work plan from the Location drop-down menu. Options include **End of Project**, **Under Selected Task (As Child)**, or **After Selected Task**.
5. Click **Next**.
6. If applicable, review and update field mappings from the template to the corresponding fields in your existing work plan.
7. Click **Next**.
8. If applicable, review and update resource mappings from the template to the corresponding resources in your existing work plan.
9. Click **Insert**. The work plan template will append to your work plan.

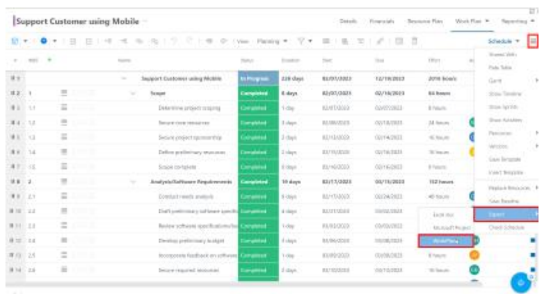
Export Work Plan Templates

This article explains how to export work plan templates from the Work Planner.

Exporting work plan templates allows you to easily share your templates with other OnePlan users.

To export a work plan template:

1. Select the **Grid Options** menu > **Export** > **Work Plan**.



2. A JSON file will download to your Downloads folder. The JSON file is your work plan template that you can share with other OnePlan users.

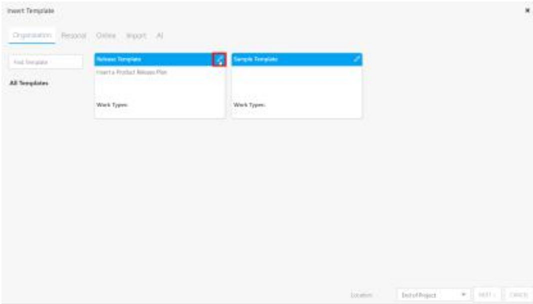
Edit a template

This article explains how to edit work plan templates.

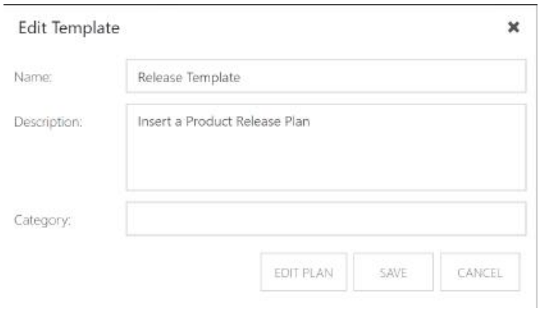
To edit a template:

1. Go to the **Schedule** work type view.

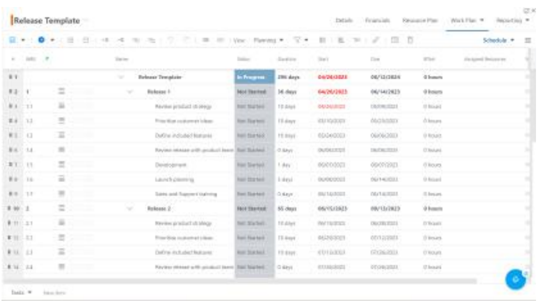
2. Select the **Grid Options** menu > **Insert Template**. The **Insert Template** form will open.
3. Locate the desired template. Click on the edit icon next to the desired template. The **Edit Template** form will open.



4. Update the template information as desired.



5. To update the template work plan, click **Edit Plan**. The template work plan will open.



6. Edit the template work plan as desired.
7. Click **Save** to save any changes to the work plan.

Delete a template

You can use the Bulk Plan Cleanup tool in the Admin pages to delete a template. See What are the Tools options? for instructions on using the tool.

NOTE
Only users with administrative permissions can use the Bulk Plan Cleanup tool.

NOTE
It is best practice to include "template" in the name of your templates. This makes it easier to locate in the Bulk Plan Cleanup tool if you would like to delete the template.

Work Plan Check Schedule

This article explanins how to use the **Check Schedule** feature of the OnePlan work planner.

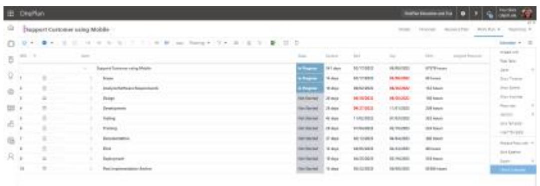
The Check Schedule feature in the OnePlan work planner runs backend checks with the database to ensure your schedule data's integrity.

A scenario when you would want to use the Check Schedule button is after you import a work plan template into your work plan. Check Schedule will check your schedule and repair any errors that could occur when importing a template - such as date errors.

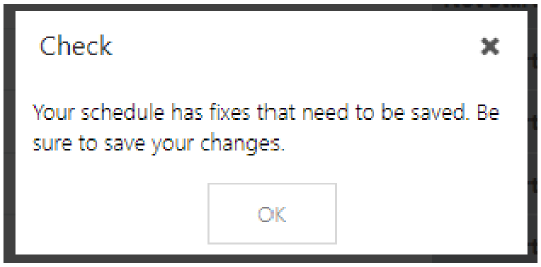
You may also want to run Check Schedule on your schedule when you bring data into OnePlan via an integration. Again, Check Schedule will check your data and repair errors.

To run a schedule check:

1. Click on the grid options menu. Then select **Check Schedule**.



2. The schedule check will run. Once it is complete, click **Ok** in the **Check** popup that appears.



3. Save your work plan to save any adjustments made during the check.

Work Plan Board

Use the Work Plan Board

This article explains how to use the features of the Work Plan Board. The information in this article is applicable whether you created your schedule in the Grid page or published your schedule from another connected tool, such as Microsoft Project or Project for the Web.

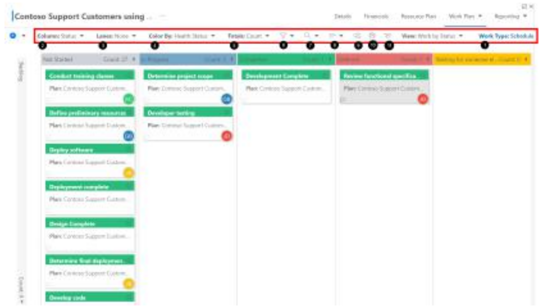
Open the Work Plan Board

Go to the Work Plan **Board** page for your plan via the **Work Plan** drop down menu. All the work items/bookings show in the board columns (swim lanes) and lanes (if applicable) based on each item's status.

If you have saved board views, select that view from the **Views** drop down. You can also create and save board views. See Save board views [197].

Otherwise, you can configure the board view for the current session. Options vary based on your organization's OnePlan configuration:

1. Select the desired **Work Type**.
2. Select the **Column** field view.
3. *(Optional)* Select the **Lanes** field view.
4. *(Optional)* Select the **Color By** field view. This options changes the color of the tile headers based on the item's status.
5. Select the **Totals** value. This will sum the selected value from each item in each row. The total value appears in the right of each column header.
6. *(Optional)* Apply a filter to narrow the items in the board. Select one or more filters from the **Filters** drop down.
7. *(Optional)* Set the size of the tiles for your view. Select a size from the **Zoom** drop down. Options are Small, Medium, and Large. Default setting is large.
8. *(Optional)* Select one or more task fields to display on the tiles from the **Fields** drop down.
9. *(Optional)* Turn on visual links between **dependent** tasks by clicking the Dependencies icon.
10. *(Optional)* Edit constraints for the selected tile total value (see number 5). Options are None, Below Constraint, and Above Constraint.
11. *(Optional)* Load any sub-plans into the board view by selecting the **Sub-Plans** icon.



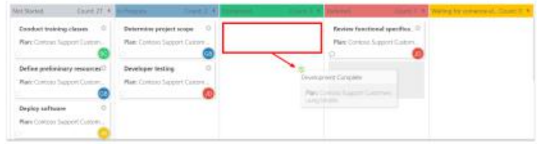
Save Board Views

To save a board view for future use:

1. Configure the board as desired.
2. Expand the **View** drop down and select **Save View**. The **Save View** form will open.
3. Complete the **Save View** form.
   - **View Name:** Enter the name of the view.
   - **Default View:** Check the check box if the new view is a default view. This means when opening the work plan board, this will be the view.
   - **Personal View:** Check the check box if the new view is a personal view. This means the view will only be available in your instance of OnePlan.
4. Click **SAVE.**

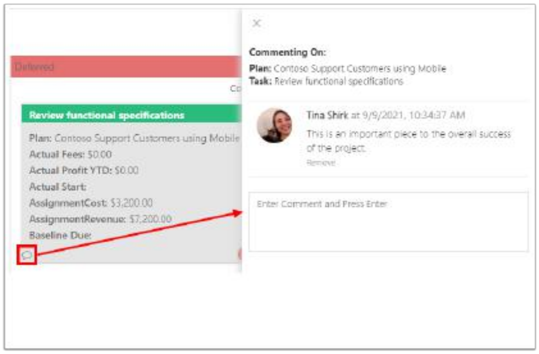
Drag and Drop to Update Booking Status

To move a booking status, simply select the desired item tile, then drag and drop the tile into the correct location.



View and Add Comments

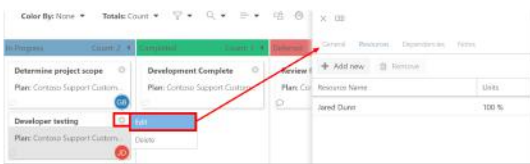
Click on the Comment icon on the desired tile. The Comments window will open. Any comments already added will show. Add a new comment and hit the Enter key to save. Comments show with you made the comment and a date/time stamp.



Edit a Booking

Select **Edit** to view the booking information and update any fields on the Booking Information window as needed.

Select **Delete** to delete the booking.

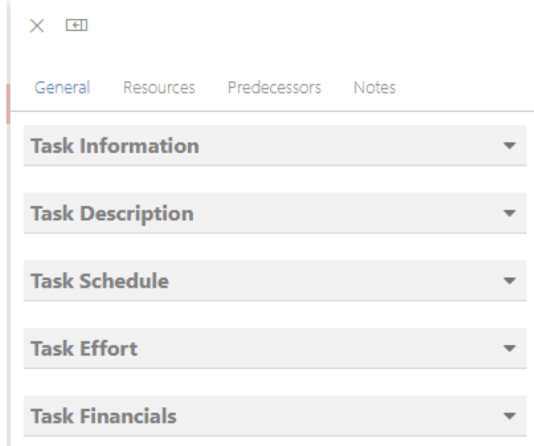


General Tab

The General Tab is divided into several topics:

- **Task Information:** View and edit general task information such as task name, status, and priority.
- **Task Description:** View and edit the task description.
- **Task Schedule:** View and edit the task schedule information such as start and due dates.
- **Task Effort:** View and edit task effort information including effort estimates, timesheet hours, and remaining effort.
- **Task Financials:** View and edit task financial information like estimated budget, estimated and actual costs, and profits.

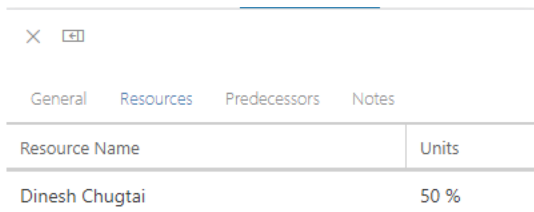
The fields within each topic will vary based on your organization's configuration.



Resources Tab

View and manage the assigned resource(s).

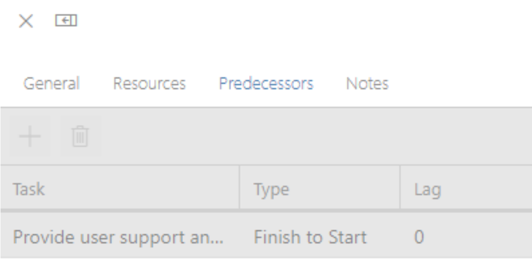
- Update the resource allocation % units. Click into the Units field and change the resource's allocation.



Predecessors Tab

View task predecessors.

> **NOTE**
> You cannot edit task predecessors or dependencies from the Board.



Notes Tab

Add and edit notes on the task as needed.

Resource Plans

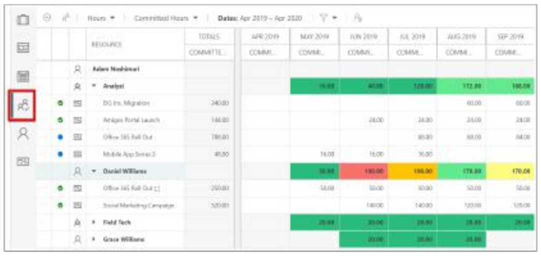
Resource Plans Overview

This article an overview of the OnePlan Resource Plans. OnePlan has both plan-level and organization-wide resource planning capabilities.

Global Resource Plan

The Global Resource Plan shows all resource allocation across all the plans. This is a useful page for managers to review allocation across multiple plans.

If your organization is using the Negotiations feature, the email notifications contain a link to the Resource Plan page, filtered for that plan's resources. You can also navigate to the page directly via the Resource Plan icon on the OnePlan navigation menu.



Global Resource Plan Overview Video (03:52)

https://player.vimeo.com/video/791263430

Plan-Level Resource Plan

The plan-level Resource Plan shows resource allocation for a particular plan.

Plan-Level Resource Plan Overview Video (04:39)

https://player.vimeo.com/video/790470410

Pre-filters

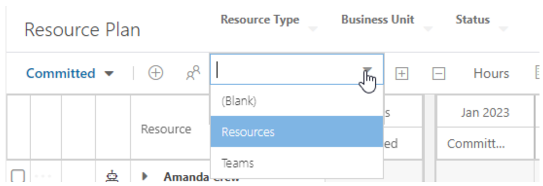
Select a pre-filter to review desired resource types. Pre-filters are configured by your administrator. Pre-filters can be required or optional. When pre-filters are required, no resources will be displayed in the Global Resource Plan page until a pre-filter is applied.

Resource Type Pre-Filter

You can filter the Global Resource Planner by Resource Type so you can view either individual resource allocations or team allocations.

IMPORTANT

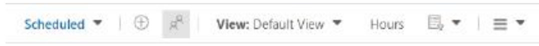
You can only view Resources or Teams allocations. You cannot view both at the same time.



Resource Manager Pre-Filter

The resource manager pre-filter is a server-side filter that loads resources into the Resource Plan area and/or Resource Center area based on user permissions and **Resource Managers** admin settings. See How the Resource Manager pre-filter works for more information.

Icon Menu



Icons listed in order from left to right:

Icon	Name	Description
Scheduled	Cost Types Menu	Toggle between Resource Plan cost types. Cost Types are configured per business use case. These allow for analysis of how resources are initially planned compared to how they are actually assigned and work.
	Add Booking	Click this icon to launch the booking form.
	Candidates List	Click the icon to toggle showing the Candidates List on the bottom half of the screen. See How do I use the Resource Pane? [217] for more details.
View: Resource Summary	Views	Select the View menu drop down to change views, save views, and delete views.
Hours	Planning Units Mode Menu	Select Hours, % (Percent), or FTE (Full Time Equivalent).
	Modify View Menu	Settings in this menu include: • **Dates**: Select the desired date range of periods. Note that the "Totals" column will calculate based off the date range selected if the planning unit mode is % or FTE. • **Filter**: Select a filters to narrow what shows in the page. Select **Clear Filters** to remove all filter selections. • **Group By**: Select a field to group the resources by that field. Resource-level choice fields (such as Department and Role) are available for grouping. • **Compare To**: Select cost type comparisons to view in the grid.
	Resource Plan Advanced Menu	Options in this menu include: • **Delegates**: Only available if negotiations are enabled. The Resource Manager can assign delegates to approve on their behalf, such as their team or department. • **Legend**: Describes the meaning of the color heat map for the resource plan details. The colors are based on their percentage of availability utilized. • **Copy Values**: Click to copy resource plan data from one cost type to another. See Copy Resource Plan Values [216] for more information.

Icon	Name	Description
	Refresh	Click to update the data in your resource plan.

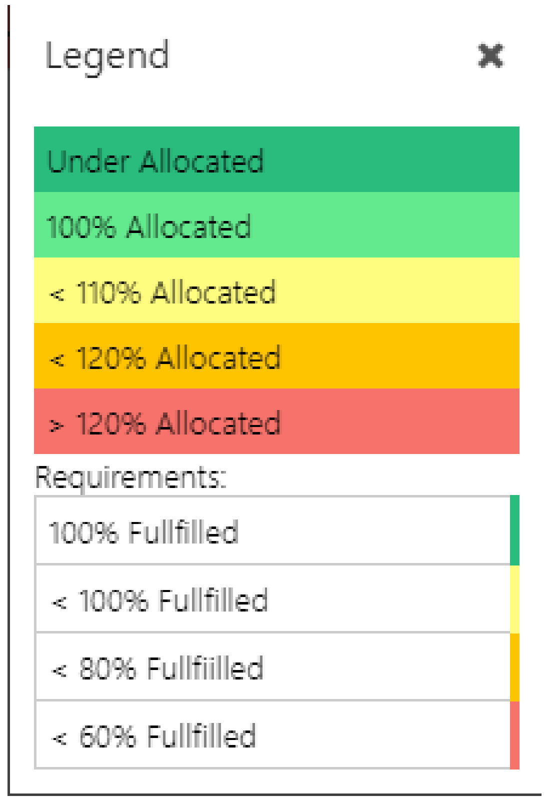
Resource Plan Details

The bookings are grouped under each resource. Public rows (if the public/private feature is enabled) show.

The summary rows show the total allocation for each resource. The colors are based on their percentage of availability utilized (how much of their time is taken).

Resource Plan Color Legend:

- Green Cell: Less than 100% Availability Used
- Light Green Cell: 100% Availability Used
- Yellow Cell: Greater than 100% --- to --- Less than or Equal to 110% Availability Used
- Orange Cell: Greater than 110% --- to --- Less than 120% Availability Used
- Red Cell: Greater than 120% Availability Used
- Green Tab: Resource requirement 100% fulfilled
- Yellow Tab: Resource requirement is greater than 80% -- to -- less than 100% fulfilled
- Orange Tab: Resource requirement is greater than 60% -- to -- less than 80% fulfilled
- Red Tab: Resource requirement less than 60% fulfilled

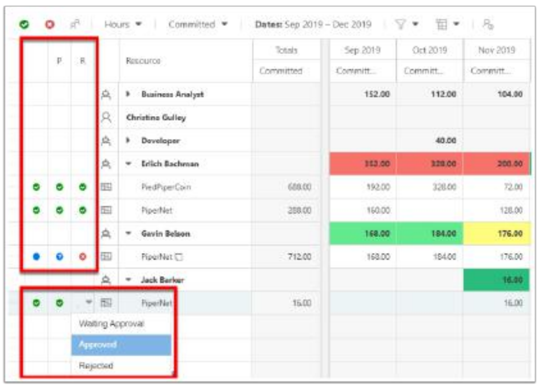


Resource Plan Details and Candidates List

If you show the Candidates List in the lower half of the screen, each resource's summary row shows remaining availability. The color legend is the same as noted above. See Resource Plan Candidates List Overview [217] for more information about the candidates list.

Resource Approvals with Negotiations

When the Negotiations feature is enabled, the additional status and approval columns show. See How is resource planning done with the Negotiations feature enabled? [210] for more information about the notifications and approvals with negotiations.



Use the One Plan Resource Planner Basics

This article describes the basics for using the OnePlan Resource Planner.

https://www.youtube.com/embed/MN1w5cIhoDw

1. Resource Plan Cost Types

Here we see Resource Plan Cost Types. Resource Plan Cost Types allow organizations to calculate, evaluate and monitor how resources are being allocated. There are possible (and often likely) differences between how our resources' time is initially planned, booked onto specific work, and then actually spent. The Resource Plan allows multiple types so you may analyze the differences. You can toggle from one type to another.

The reason these groupings are called "cost" types is because the resource plan hours may be converted to costs when they are imported into the financial plan. The rate for each resource, according to their role or other cost category factor would be multiplied by the number of hours to get the financial value of that resource's time.

Your organization may have similar or different cost types depending on business use cases and configuration. Here are some example use cases that may apply.

- The Committed Hours cost type would be the initial plan generally estimated at a high level. This is also referred to as top-down planning.
- The Scheduled Hours cost type would be the totals from the detailed task schedule. You could import the task schedule hours into this resource plan cost type.
- The Actual Hours cost type would be the time spent on this plan. You could import the timesheet hours into this resource plan cost type.

Read more about Resource Plan Cost Types:

- Resource Plan Cost Types

2. Totals

The totals show per resource. The calculated total will vary based on the planning mode. The totals are based on which periods are showing in the view.

- Hours: The sum of hours allocated in the visible time periods.
- %: The average percentage of time of a full time person, based on the number of working days in the visible time periods.
- FTE: The average count of a full time person, based on the number of working days in the visible time periods.

Read more about Resource Plan Totals:

- Resource Planning Units Mode

3. Time-Phased Resource Allocation

Resource usage is viewed and/or edited per time period shown. Based on the Dates menu selection, resource usage may be summed up or broken out in more or less details (i.e. monthly, quarterly, yearly).

Read more about Resource Allocation:

- Build a Resource Plan
- Add a Booking to a Resource Plan
- Add a Resource to a Resource Plan

4. Candidates List

The Candidates List shows in the lower half of your screen. This is where you can see how else the resources are allocated. This is beneficial to first see who is already booked or has availability before or after adding to your plan.

By default, the current plan's resources will show. Expand any resource to see where else that resource is being utilized.

The colors signify the percentage of the resource's remaining availability. So, for example, the color will shift from green to yellow to orange to red as the resource becomes overbooked beyond capacity.

Read more about the Candidates List:

- Resource Plan Candidates List Overview
- Find Resources with the Candidates List
- Replace a Resource with the Candidates List
- Fulfill a Resource with the Candidates List

Build a Resource Plan

This article explains how to build a OnePlan Resource Plan at the plan level.

NOTE

The plan-level resource plan will then roll up to the Global Resource Plan for the Resource Manager to review.

A Resource Plan is for high-level allocation of resources to your plan. This is not yet detailed task planning. For example, rather than build out a detailed schedule of tasks for John, you would instead commit John 50% of his time for the next four months.

Later, after the Resource Plan is built, you will import the Labor costs into your Financial Plan, based on the resource plan. Also, for portfolio analysis, you will be able to assess which plans to move forward and when based on the resource needs across all plans compared to the overall availability of your resources.

IMPORTANT

This article assumes the Negotiations feature is DISABLED / not in use. See How is resource planning done with the Negotiations feature enabled? [210] for the specific differences if the Negotiations feature is enabled.

1. Navigate to the Resource Plan Module

Navigate to the Resource Plan page for your plan, if not already there, by clicking Resource Plan in the Header.

2. Select the Resource Plan Cost Type

Before booking resources to your plan, be sure you are viewing the correct cost type if your environment has multiple. Select the desired cost type from the drop-down menu.

NOTE

Resources must be assigned a role to import their timesheet (actual) hours into the resource plan.

3. Select the Period Length and Date Range

1. Click the Resource Plan View Options menu in the header. Then select **Dates**.
2. Select the desired period length (monthly vs quarterly vs yearly) and date range to which you will be adding resource allocations.

> **NOTE**
> If you enter hours values into larger periods, such as into quarters or years, then switch to months, the values will be split across the months based on the calendar working days per month/periods.

3. Click **Apply** to apply the set date range to the resource plan view.

4. Add Resources or Teams to the Resource Plan

In OnePlan, there are two ways to add resources or teams to your Resource Plan:

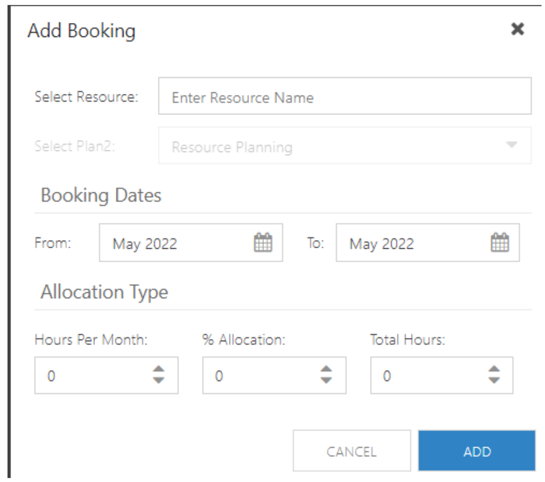
Add a Booking to a Resource Plan

Bookings in OnePlan is a way to quickly allocate resources or teams to your resource plan. Bookings are set for a certain time period and will allocate the resource or team evenly across that time period.

Click **Add Booking** ⊕. The Booking form will open. Complete the form.

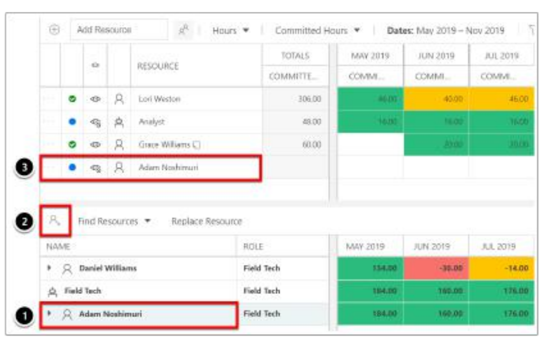
- **Select Resource**: Begin typing the resource (either named or generic) or team name. Available matching resources and teams will show. Make your selection. You can select multiple resources and teams so you can make bookings for multiple resources at once.
- *(if applicable)* **Select Plan:** Select the plan where you would like to add the booking.
- **Booking Dates**: Set the date range for the allocation. Select a **From** and **To** month and year.
- **Allocation Type**: Enter the value in ONE of the allocation types: **Hours Per Month**, **% Allocation**, or **Total Hours**. If you select Total Hours, the hours will be divided evenly across the time selected between the booking dates.

Click **Add** when done.



Add a Resource to a Resource Plan

1. Open the Candidates List. Find and select the desired resource (whether a named resource or generic), or team. See Find Resources with the Candidates List [218].
2. Click the **Add** button.
3. The resource will be added to the resource plan above. Allocate the newly added resource as needed.



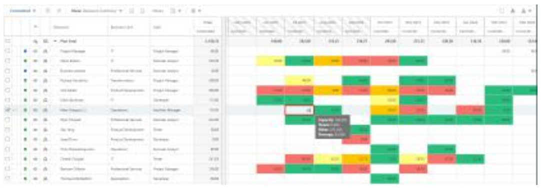
5. Add Resource or Team Allocations to the Resource Plan

There are two ways to add time allocations for resources or teams in your resource plan:

Manually Enter Time Allocations into the Resource Plan

1. Verify you have the preferred planning mode selected (Hours, %, or FTE). This determines how the allocation values are displayed and calculated in the resource plan.

2. Add allocations manually into the Resource Plan. Click into a cell in the resource plan grid and type in the allocation.



NOTE

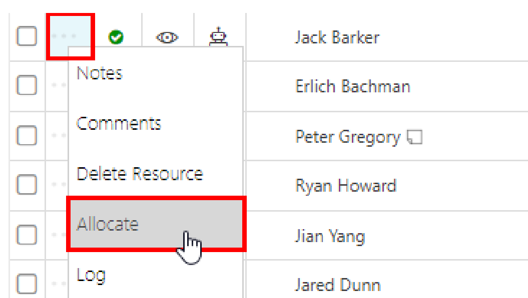
When you add time allocations to teams of resources, the time will automatically be split among the team based on how their individual time is allocated to the team itself (see Allocate Resources to Teams (Total Percentage and Time-Phased Allocation) for more information.)

You can manually change/override the automatic split by clicking into a cell in the resource plan and manually typing in the preferred allocation.

Use the Allocation feature to Bulk Add Time Allocations

If desired, you may allocate time to your resources via the booking form rather than manually entering values. Select the row menu for a resource in the resource plan.

1. Click the Row Options menu (ellipsis) for the desired resource. Then select **Allocate**. The **Bookings** form will open.

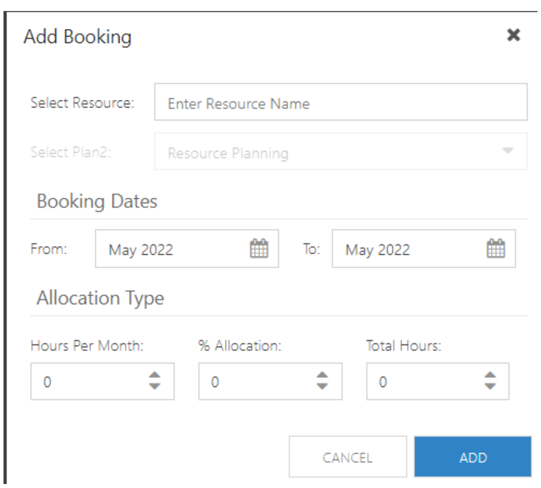


2. Complete the Bookings form.

- **Select Resource**: Begin typing the resource (either named or generic) or team name. Available matching resources and teams will show. Make your selection.
- *(if applicable)* **Select Plan:** Select the plan where you would like to add the booking.
- **Booking Dates**: Set the date range for the allocation. Select a **From** and **To** month and year.
- **Allocation Type**: Enter the value in ONE of the allocation types: **Hours Per Month**, **% Allocation**, or **Total Hours**. If you select Total Hours, the hours will be divided evenly across the time selected between the booking dates.

3. Click **Add**to add the resource allocation.

> **NOTE**
> Whatever is entered in the booking form will overwrite any existing resource allocation for the time between the booking dates.

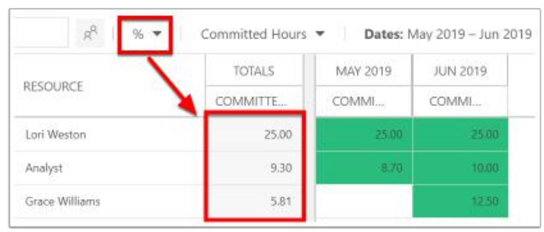


6. Review Resource Totals

There is a Totals column that shows the "total" per resource.

> **NOTE**
> The value in the total column is based on the periods shown in the view and the type of planning mode (hours, %, or FTE). Any periods not selected will not be included in the total.

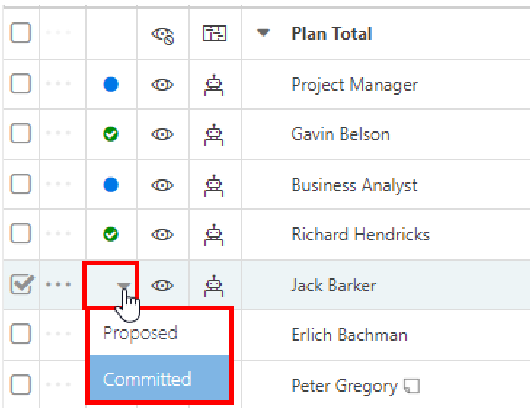
If you have % selected, the value for the totals column would include the months/periods with no values & those with values.



7. Update the Status of Resource Rows

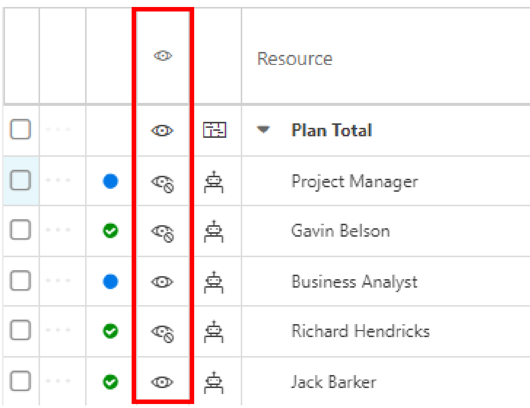
Each resource plan rows has statuses, either **Proposed** or **Committed**. When a row is first added, the default status is **Proposed**, which shows as a blue dot. Then, when ready, the row can be changed to **Committed**, which shows as a green check mark. There are additional row statuses for organizations using the Negotiation feature.

To update the row status for a resource, click on the status icon next to the desired resource, then select the desired status from the drop-down.



8. Set a Resource Row as Public or Private

If the Public/Private feature is enabled, an additional column shows whether each row is **Private** or **Public**.



When a row is **Private**, that means that the row is not visible in reports or the Global Resource Plan. Think of **Private** rows as drafts. They are only available for the plan managers and owners to view and edit.

Private rows are indicated by .

When a row is **Public**, that means that row is available for reporting and visible in the Global Resource Plan. Think of **Public** rows as published data. They are available for anyone (with the proper permissions) to see.

Public rows are indicated by .

Click on the icon to toggle between **Private** and **Public** for each row.

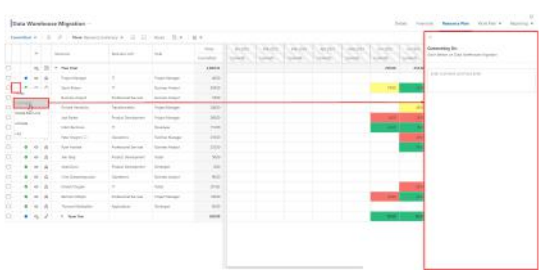
You can change all rows from **Private** to **Public** at once by clicking the **Public/Private** icon in the column header.

9. Add Notes and Comments to Resource Rows

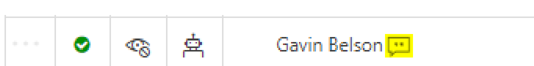
Add a Comment to a Resource Row

Comments allow you and your colleagues to have an asynchronous discussion on resource allocations in your resource plan. These comments will remain in a thread, and the thread will appear on the Home Page "Conversations" panel for quick access.

To add a comment to a resource row, click the Row Options menu (ellipsis) for the desired resource. Then select **Comments**. The Comments thread will open on the right side of the screen. You will be able to see the existing conversation and can add a comment to the thread.



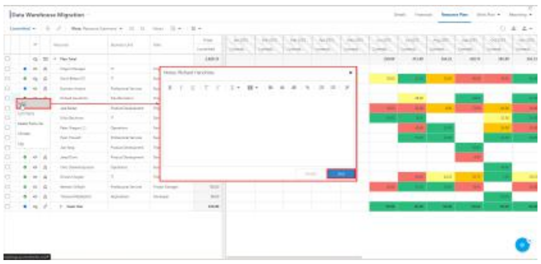
Once there are comments on a resource row, a speech bubble will appear next to the resource name.



Add a Note to a Resource Row

Notes allow you to add additional information to your resource allocations. Notes live in the resource plan, and nowhere else in OnePlan.

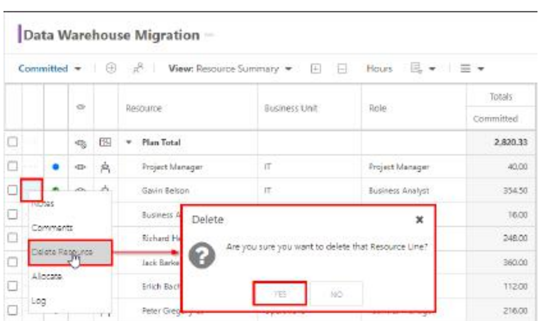
To add a note to a resource row, click the Row Options menu (ellipsis) for the desired resource. Then select **Notes**. The **Notes** form will open. Type out your notes in the **Notes** form, then click **Save**.



Once there are notes on a resource row, a sticky note will appear next to the resource name.

10. Delete a Resource from your Resource Plan

To remove a resource from your resource plan, click the Row Options menu (ellipsis) for the desired resource. Then select **Delete**. A confirmation will pop up. Click **Yes** to delete the resource.



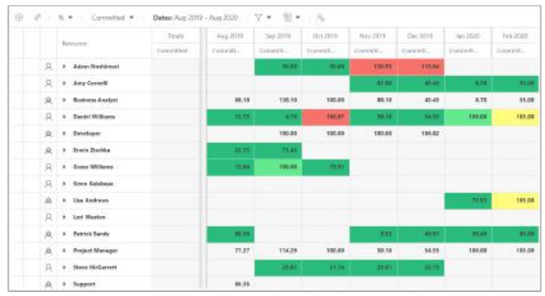
How does a Resource Manager Review Resource Plans?

This article explains how to review and update resource allocation across all plans.

As a Resource Manager for a team or department of resources, you would want to verify your team isn't overbooked. You may also want to commit specific named users to plans where generic role placeholders had been used.

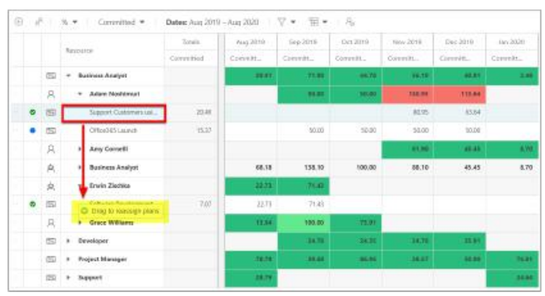
Navigate to Resource Plans

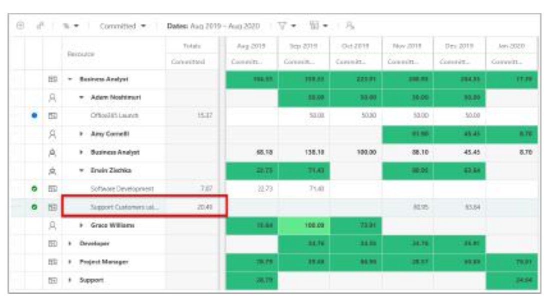
Navigate to Resource Plans via the main navigation. This shows all resource plans across all plans. Based on the planning units mode (%, hours, or FTE), you see the total per resource. The colors show whether the resource is booked under, at, over their capacity.



Adjust Commitments

Group, filter, and adjust view as needed. For example, group by role. Expand a role, such as Business Analyst. Then, expand the resources within the group to see to which plans the resources are allocated. You can drag a plan to a different resource to commit someone else to that plan.





NOTE: Resources must be assigned a role to import their timesheet hours into the resource plan.

How the Resource Manager pre-filter works

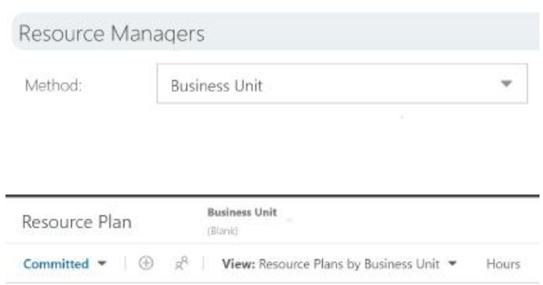
This article explains how the Resource Manager pre-filter works for users set as resource managers in OnePlan admin. Resource managers are off by default. To set up resource managers, see How do I set Resource Managers?.

The resource manager pre-filter is a server-side filter that loads resources into the **Resource Plan** area and/or **Resource Center** area based on user permissions and **Resource Managers** admin settings.

Owners and Managers

Users with Owner or Manager permissions can view all resources in their OnePlan group, and can use the pre-filter to narrow down the list of resources in the **Resource Plan** area. The pre-filter is based on the **Method** set in the **Resource Managers** settings.

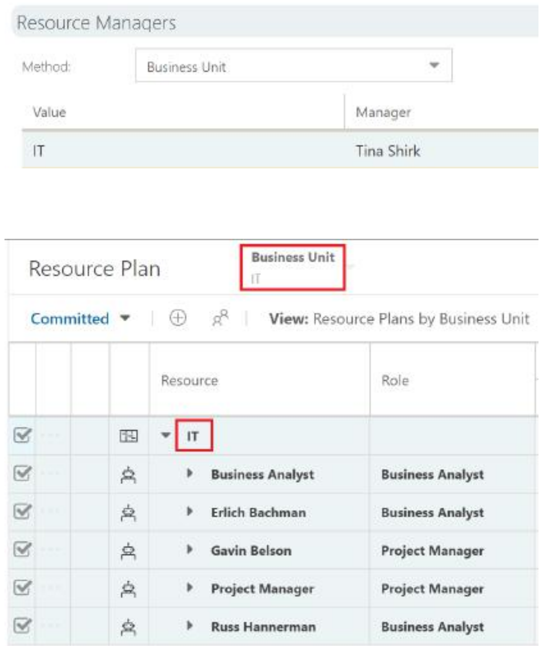
For example, Owners or Managers who are set as resource managers using a **Business Unit** method, the users will see a **Business Unit** filter in the **Resource Plan** area.



Contributors

Users with Contributor permissions do not have access to other resources in their group. However, as a resource manager, Contributors can see the resources they manage in the **Resource Plan** area and **Resource Center** area.

For example, if a Contributor is designated as a resource manager for IT, they will be able to view all of the IT resources in the **Resource Plan** area and **Resource Center** area. But, they cannot view any other resources.



Candidates List "My Resources" Filter

When opening the candidates list, no resources will be loaded by default. If you have resource managers setup, clicking my resources will now show just the resources you are the manager of. This ensures fast loading of the candidate grid when the logged in user has permissions to all users in the system.

How is resource planning done with the Negotiations feature enabled?

This article explains how to use the Resource Planner in OnePlan when the Negotiations feature is enabled.

https://player.vimeo.com/video/792275326

Your administrator would enable the Negotiations feature and select the resource manager settings. Typically, the resource manager is a functional or departmental manager, but could vary based on business use case.

If Negotiations are enabled after initial setup of your OnePlan environment, previous time data in the Resource Plan will not change.

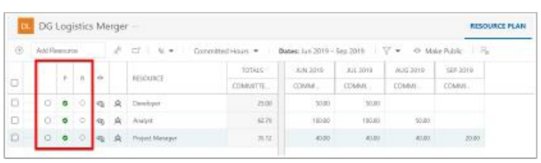
Time proposed in the Resource Plan will remain proposed and will now need to be approved by the Project Manager (PM) and Resource Manager (RM).

Time committed in the Resource Plan will remain in a committed state, and does not need approval from the PM and RM. However, the PM and RM approval icons will remain blank in the Resource Plan.

Resource Plan Differences

Row Status & Approver Status Columns

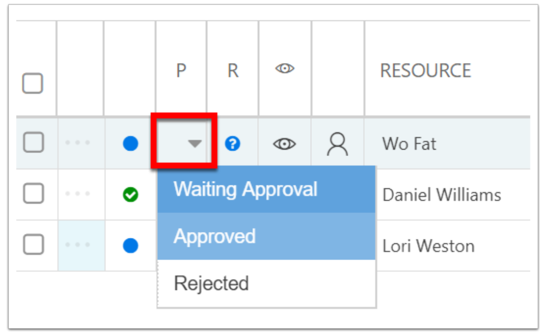
Unlike in the regular resource plan view, you cannot manually change the status of the row. With Negotiations feature, initially a new row has a status of Draft, shown as a white circle. The primary difference in process is that the Plan Owner (shown as a “P" column) and the Resource Manager for that row (shown as an “R” column) both need to agree/approve for the row to be fully committed.



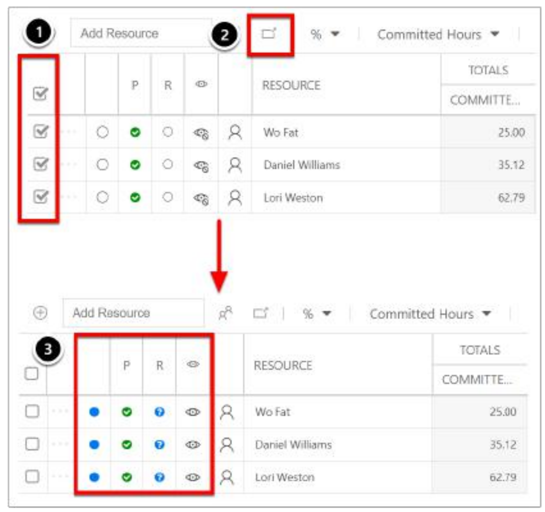
Process for the Plan Owner

The plan owner follows the same steps and use the same tools to build out the resource plan.

1. Select a single or multiple rows.
2. Click the **submit** icon.
3. Your column will show as a green check-mark. The other column will show as a blue question mark for pending approval. And the row status changes from draft to proposed. Any rows marked as private will change to public.



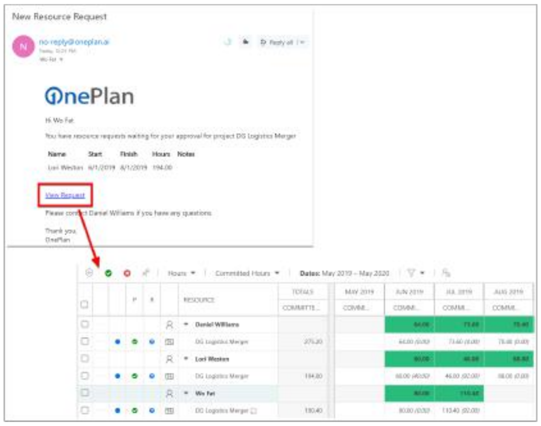
Alternatively, select the status column for a row and select Waiting Approval, Approved, or Rejected.



Process for the Resource Manager

Resource Manager Email Notification

As the Resource Manager for the requested resource(s), you will receive email notifications when the Plan Owner submits their Resource Plan row(s). The details of the request show, and include a link to "View Request." The link takes you to the All Plans Resource Plan page

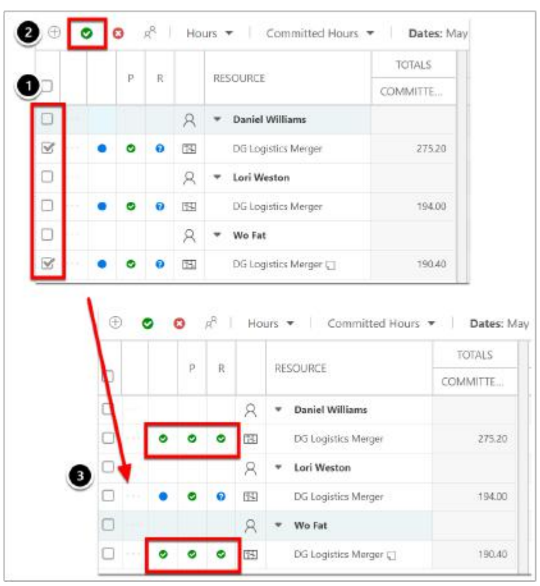


Resource Manager Updates to Resource Plan

The Resource Manager approves the resource plan allocation via the Resource Plans page.

1. Select a single or multiple rows.
2. Click the **approve** icon.
3. Your column will also show a green check-mark. And the row status changes from proposed to committed now that both have agreed.

If either the Plan Owner or Resource Manager makes a change to the resource plan, the row status changes back to Proposed. The new value shows. The previous value shows in parenthesis.

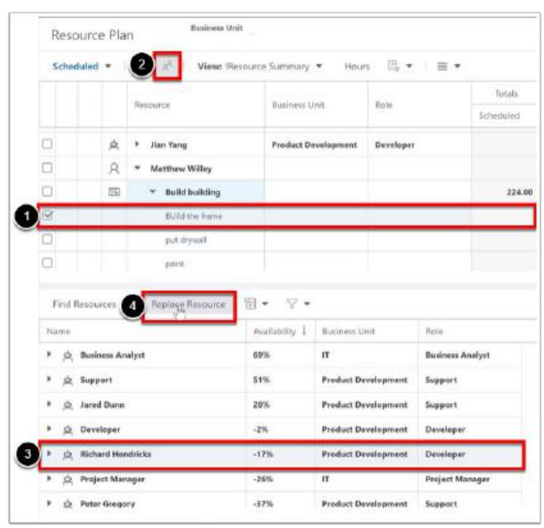


Resource Manager Requests Task Reassignment

If a resource is overbooked or does not have any availability for a particular task, the Resource Manager can recommend a replacement resource for tasks within a project.

NOTE: Ensure you are looking at Scheduled resources.

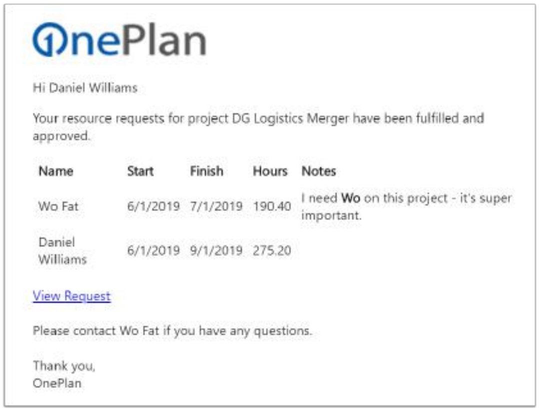
1. Locate the overbooked resource. Expand the resource until their assigned tasks are visible. Select the task that you would like to reassign.
2. Open the Resource pane.
3. Search for and select a replacement resource in the Resource pane.
   NOTE: You may also need to select the project in the top pane to search for a replacement resource.
4. If applicable, Deselect the project in the top pane. Make sure the task is still selected.
5. Click **Replace Resource**.



A status update notification will appear on the affected project indicating the suggested change for Plan Owner to review and approve.

Plan Owner Email Notification

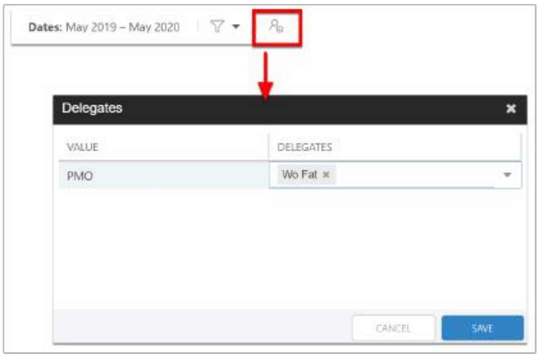
When the Resource Manager either approves or rejects a resource request, the Plan Owner will be notified via email.



Delegates

The Resource Manager & Delegates settings are managed by your admin. If you are a Resource Manager (such as for a specific department, role, or other), you can also assign delegates to review and approve resource plans.

Click the Delegates icon. Any groups, such as your department, for which you are the manager, will be listed. Designate any delegates as needed.



Reporting

When looking at Resource Plan information in reports, there is a status field, to be able to report on the approval status of each resource request.

Compare Resource Plan Types

This article explains how to use the compare feature in the OnePlan Resource Planner to analyze differences between how your resources' time is initially planned, booked onto specific work, and then actually spent.

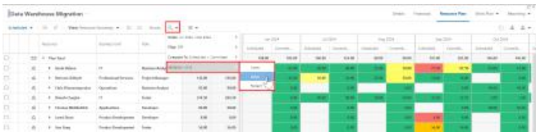
Enable the Compare To View

To enable the **Compare To** View in the Resource Planner (both the Global Resource Plan and Plan-Level Resource Plans):

1. Click on the **Modify View** menu. Select **Compare To**, then select the comparison you would like to view in the Resource Plan. You can compare the current Resource Plan Cost Type with other available Resource Plan Types in your OnePlan group, checking whether it is greater or less than them.

Compare To View Enabled:

2. Go back to the **Modify View** menu. Select **Variance**, then select how you would like to view the variance between the compared Resource Plan Types. Options include **None** (not showing the variance), **Value** (based on the currently selected Planning Units Mode), and **Percent**.



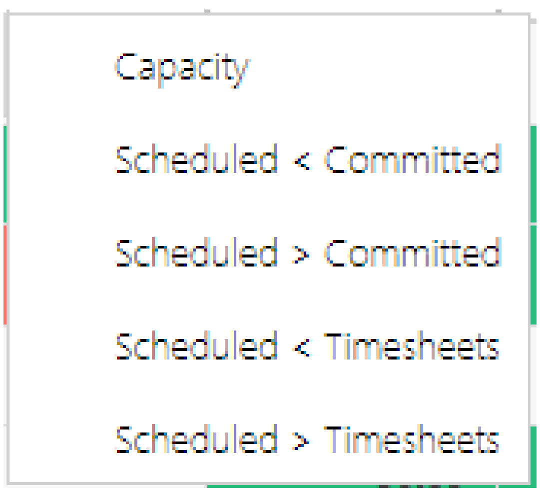
Variance Enabled:

Changes to the Resource Plan with the Compare To View Enabled

Enabling the Compare To view in the Resource Planner triggers several changes to the Resource Plan.

- In the updated Resource Plan, each row will feature two columns: one for the current Resource Plan Type allocations and another for the allocations of the other Resource Plan Type. The data in the second column, representing the other Type, is view-only.

- Depending on the chosen comparison, the Resource Plan will highlight differences between Types. You can set it to highlight when the other Type is either greater or less than the current one.



In this example, I have the **Scheduled < Committed** comparison enabled. This means the Resource Planner will highlight the Committed column whenever the Committed allocations are higher than the Scheduled allocations.

- If you enabled Variance, an additional column will appear to show the variance between the two Resource Plan Types. Depending on your selected comparison, this Variance column will highlight differences between the Types. You can configure the Resource Plan to highlight the Variance cell where the other Type is either greater or less than the current one.

- When comparing, the ellipsis will be disabled for resources that are not in the originally selected type. This adjustment ensures that only selectable resources within the chosen resource plan type are available, improving clarity and preventing unintended selections during the comparison process.
- When comparing Resource Plan Types, the public/private column does not display. This is designed to reduce confusion by streamlining the view and minimizing unnecessary details regarding the status of resource bookings.

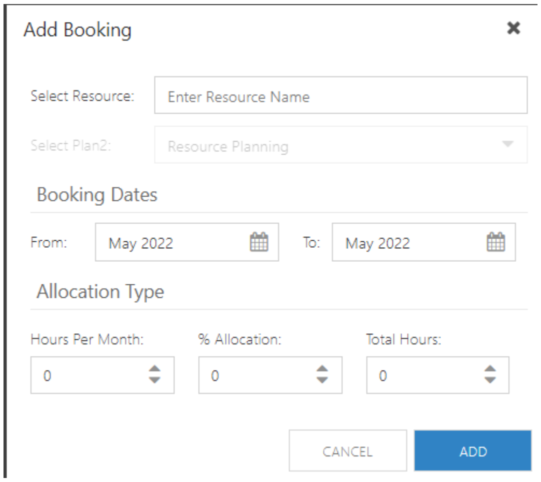
Add a Booking to a Resource Plan

Bookings in OnePlan is a way to quickly allocate resources or teams to your resource plan. Bookings are set for a certain time period and will allocate the resource or team evenly across that time period.

Click **Add Booking** ⊕. The Booking form will open. Complete the form.

- **Select Resource**: Begin typing the resource (either named or generic) or team name. Available matching resources and teams will show. Make your selection. You can select multiple resources and teams so you can make bookings for multiple resources at once.
- *(if applicable)* **Select Plan:** Select the plan where you would like to add the booking.
- **Booking Dates**: Set the date range for the allocation. Select a **From** and **To** month and year.
- **Allocation Type**: Enter the value in ONE of the allocation types: **Hours Per Month**, **% Allocation**, or **Total Hours**. If you select Total Hours, the hours will be divided evenly across the time selected between the booking dates.

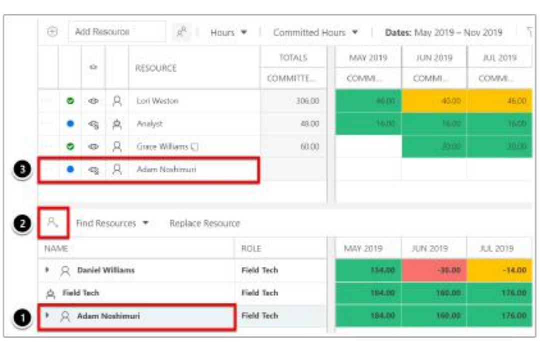
Click **Add** when done.



Add a Resource to a Resource Plan

This article explains how to add a resource to a resource plan in the Resource Planner.

1. Open the Candidates List. Find and select the desired resource (whether a named resource or generic), or team. See Find Resources with the Candidates List [218].
2. Click the **Add** button.
3. The resource will be added to the resource plan above. Allocate the newly added resource as needed.



Resource Planning Units Mode

This article describes the different planning units modes available in the OnePlan Resource Planner.

Planning Units Modes Definitions

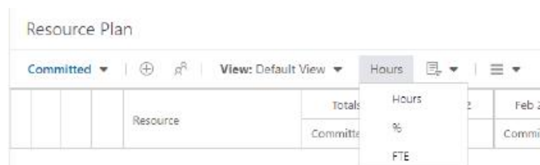
Select Hours: The number of hours a resource is assigned to a task.

% (Percent): The percentage of a resource's time is dedicated to a specific task.

FTE (Full Time Equivalent): The amount of capacity or availability of an individual to work during a specified time period.

Switching between Modes

To switch between planning units, click on the Planning Units menu and select the desired mode from the drop down. The Resource Plan will recalculate the allocation values based on the planning units selected.



Resource Plan Cost Types

This article explains resource cost types used in the OnePlan Resource Planner.

https://player.vimeo.com/video/791979373

Select the Cost Types drop down menu to toggle to another cost type. Cost types allow organizations to calculate, evaluate and monitor how resources are being allocated. There are possible (and often likely) differences between how our resources' time is initially planned, booked onto specific work, and then actually spent. The Resource Plan allows multiple cost types so you may analyze the differences. You can toggle from one cost type to another.

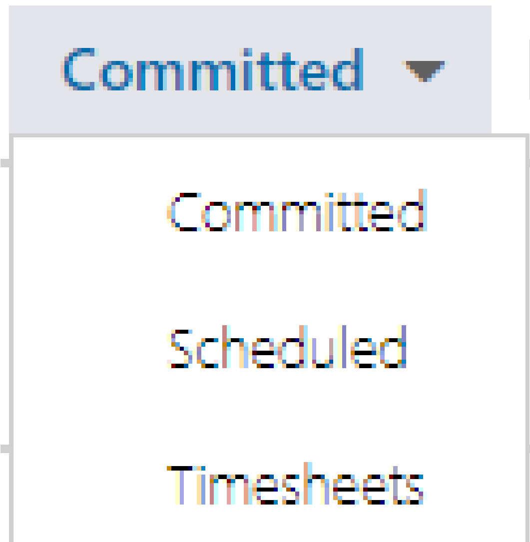
The reason these groupings are called "cost" types is because the resource plan hours may be converted to costs when they are imported into the financial plan. The rate for each resource, according to their role or other cost category factor would be multiplied by the number of hours to get the financial value of that resource's time.

Your organization may have similar or different cost types depending on business use cases and configuration. See Cost Type Settings to configure custom cost types.

Here are some example use cases that may apply.

- **Committed Hours** would be the initial plan generally estimated at a high level. This is also referred to as top-down planning.
- **Scheduled Hours** cost type would be the totals from the detailed task schedule. You could import the task schedule hours into this resource plan cost type.
- **Timesheet Hours** cost type would be the time spent on this plan. You could import the timesheet hours into this resource plan cost type.

NOTE: Resources must be assigned a role to import their timesheet hours into the resource plan.



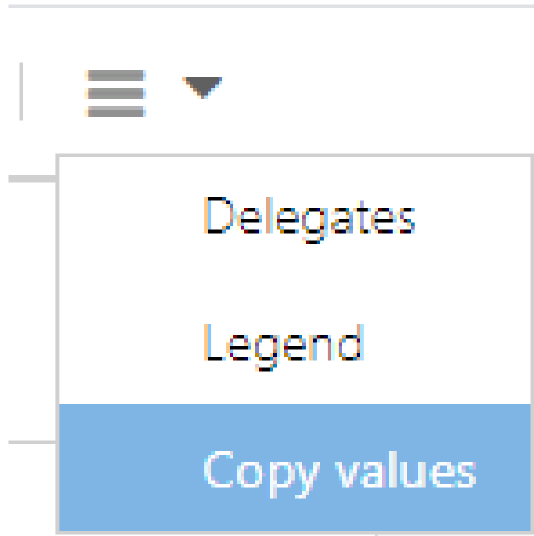
Copy Resource Plan Values

The OnePlan Resource Plan allows users to copy resource plan data from one cost type to another.

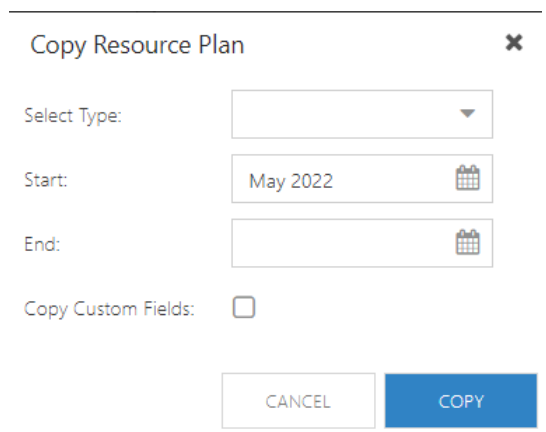
> **NOTE**
> The copy function only copies over time data. To replicate a resource plan from one cost type into another, use the Import function. See Import a Resource Plan [217].

To copy resource plan data from one cost type to another:

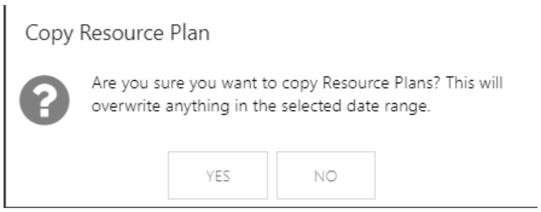
1. Select **Copy Values** from the drop down. The **Copy Resource Plan** form will open



2. Complete the **Copy Resource Plan** form.
   - **Select Type**: Select the cost type you would like to copy the resource plan data from.
   - **Start**: Select the start date for the date range you would like to copy data from.
   - **End**: Select the end date for the date range you would like to copy data from.
   - **Copy Custom Fields**: Check the check box if you would like to copy over custom resource plan fields.



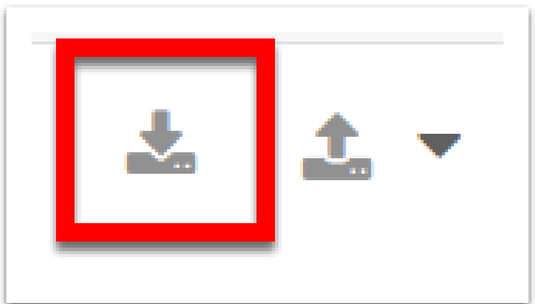
3. Click **Copy**. Then click **Yes** to confirm the copy.



Import a Resource Plan

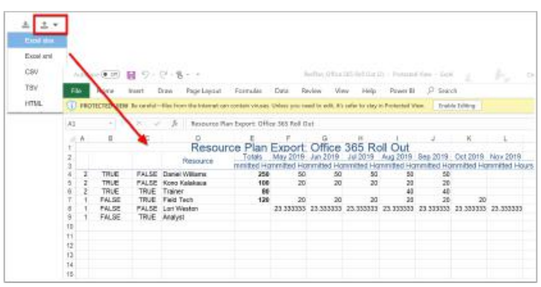
When needed, resource allocation can be imported from elsewhere in the system. For example, the timesheet hours can be imported into a resource plan cost type, such as Actual Hours. If no applicable import option has been configured by your admin, the import icon will not show. See Cost Type Settings to configure the import settings.

Be sure you're in the right cost type, then click **Import**.



Export a Resource Plan

To export a resource plan, first select the view settings, such as cost type, unit mode, dates, filters, etc. Then select your desired format from the Export menu.



Resource Plan Candidates List Overview

This article provides an overview of the Candidates List features as part of building, analyzing, and modifying resource plans in OnePlan.

https://player.vimeo.com/video/791943604

Who does these actions varies between organizations. Sometimes it's the plan owner, project manager, scrum master, etc. Sometimes it is the department or functional manager who determines the best assigned persons to a plan.

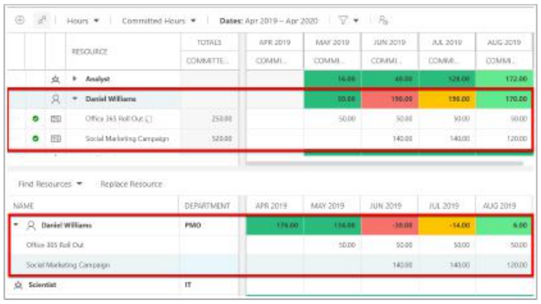
Show/Hide the Candidates List

The Candidates List may be toggled on/off by clicking on the **Candidates List** icon in the icon menu.

> **NOTE**
>
> When opening the candidates grid, no resources will be loaded by default. If you have resource managers set up, clicking **My Resources** will show just the resources you are the manager of. If you select a filter that returns more than 500 resources, only the first 500 will be loaded. You will be notified to apply more filters to narrow your results. This ensures fast loading of the candidate grid when the logged-in user has permissions to all users in the system.

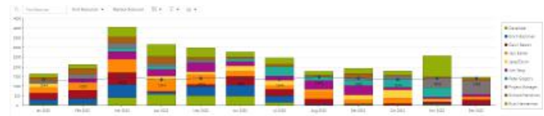
Resource Plan Details and Candidates List

If you show the Candidates List in the lower half of the screen, each resource or team's summary row shows the remaining availability.



Candidates List Header Icons and Menus

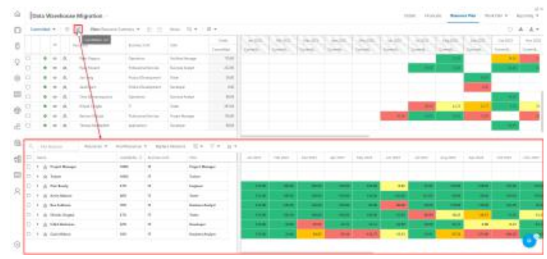
- **Add Resource**: Select a resource from the candidates list. Then click the **Add Resource** icon to add the selected resource to the resource plan.
- **Find Resource Search Bar**: Search for resources by name using this search bar.
- **Resource Type Menu**: Select which type of resource you would like to view - either individual resources, or teams of resources.
- **Find Resource Menu**: Select a search method from the drop-down. See Find Resources with the Candidates List [218] for more information.
- **Replace Resource**: Replace or Fulfill resources in the resource plan. See Replace a Resource with the Candidates List [219] and Fulfill a Resource with the Candidates List [220] for detailed instructions.
- **Group By**: Group the resources in the candidates list by a resource filed from the drop-down.
- **Filter**: Filter the resources shown in the candidates list using a filter from the drop-down.
- **Charts**: Select a visualization to view resource capacity. Options include the List (default), and the Capacity v. Demand chart. The Capacity v. Demand chart shows resource availability in a stacked bar chart.



Find Resources with the Candidates List

https://player.vimeo.com/video/791947929

1. Open the **Candidates List**.



2. Click the **Resource Type** menu, and select the resource type you want to view in the Candidates List. Options include **Resources** or **Teams**.

3. Click the **Find Resources** drop-down filtered menu to expand. Select a field to search. The results will be filtered accordingly.

> **NOTE**
>
> Options in the **Find Resources** menu will change based on the **Resource Type** selected.

If you selected **Resources** in the **Resource Type** menu, the options in the **Find Resources** menu will include:

- **Best Match**: locates resources from your resource pool based on role and availability.

> **NOTE**
> You MUST select a resource in the Resource Plan above for the Best Match search function to work.

- **By Current Plan**: shows the current plan's resources.
- **Search by Name**: begin typing a resource name to search.
- **Generics**: shows generic resources from the Resource Center.
- **By Business Unit**: filters resources based on your organization's departments.
- **By Calendar**: filters resources based on your organization's calendars.
- **By Role**: filters resources based on your organization's roles.
- **Other**: each additional resource-level field (if any) that has been configured for your organization will also show as an available field for searching.

If you selected **Teams** in the **Resource Type** menu, the options in the **Find Resources** menu will include:

- **Best Match**: locates resources from your resource pool based on role and availability.

> **NOTE**
> You MUST select a resource in the Resource Plan above for the Best Match search function to work.

- **By Current Plan**: shows the current plan's teams.
- **Search by Name**: begin typing a team name to search.
- **Al Teams**: shows all teams from the Resource Center.
- **By Business Unit**: filters teams based on your organization's departments.
- **By Calendar**: filters teams based on your organization's calendars.
- **By Role**: filters teams based on your organization's roles.
- **Other**: each additional resource-level field (if any) that has been configured for your organization will also show as an available field for searching.

Replace a Resource with the Candidates List

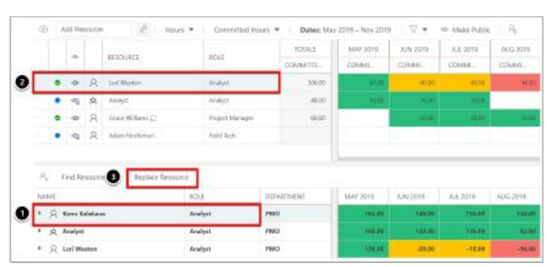
https://player.vimeo.com/video/791950240

Multiple reasons may require the plan's resources to be replaced by other resources. Two common reasons include:

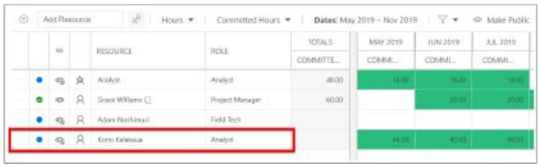
- Initially, a plan may have generic placeholders, such as by role, for who is needed, and then later a specific named person will be assigned to that plan.
- One person who was allocated to a plan may be overbooked, so another person with availability may be replaced to do the work instead.

To replace a resource:

1. Open the **Candidates List**. Find and select the desired replacement resource (whether a named resource or generic), or team. See Find Resources with the Candidates List [218].
2. Select the resource or team to be replaced in the resource plan.
3. Click **Replace Resource**.
4. In the popup, Click **Replace**.



The resource will be swapped with the new replacement in the resource plan above. The allocation will stay the same. The status will return to proposed and the row will return to private (if public/private entries are turned on).



Fulfill a Resource with the Candidates List

https://player.vimeo.com/video/791953197

If a plan has resource placeholders, such as roles, you can fulfill the resource requirement with one or more named resources, or a team of resources.

NOTE
You can fulfill resource requirements on both generic and named resources.

If you want to fulfill resources in the global Resource Plan page, set the page view to **Resource Requirements**.

1. Select the resource in the resource plan. **NOTE:** If in the global Resource Plan page, expand the desired project to view the requested resources.
2. Open the **Candidates List**.
3. In the **Candidates List**, filter for named resources or teams, such as by role, to fulfill the resource requirement. See Find Resources. Select the desired resource.
4. Click **Replace Resource**.
5. In the popup, click **Fulfill**.
6. To assign another resource to fulfill the resource requirement, repeat steps 1-5.

The placeholder resource now has named resources assigned to fulfill the resource requirement.

The resource details will show the original resource requirement, and the remaining resources needed to fulfill the requirements (in hours, FTE, or %).

Financial Plans

Financial Plan Overview (Video)

The following video provides an introduction to the OnePlan Financial Planner, including a tour of the menus and buttons, as well as an explanation of how to create a basic financial plan.

Video length: 6:50

https://player.vimeo.com/video/755263208

How do I build a Financial Plan?

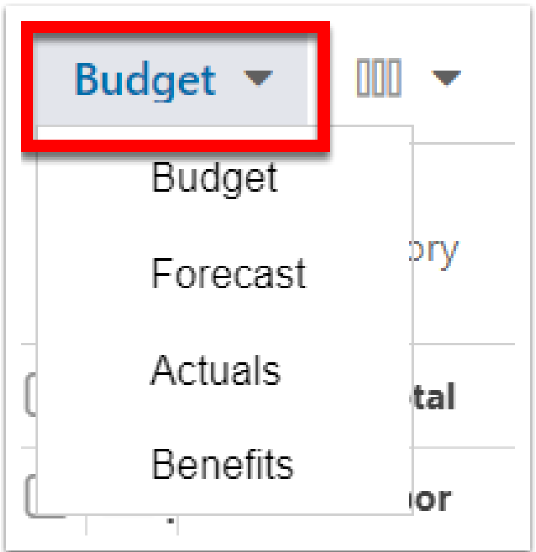
This article explains how to build a OnePlan Financial Plan. Be sure to read the previous articles in this chapter to get familiar with the Financial Plan terminology and menu options.

1. Navigate to the Financials Module

Navigate to the Financials page for your plan, if not already there, by clicking Financials in the Header.

2. Select Your Cost Type

Before adding financial details, be sure you are viewing the correct cost type. Select the desired cost type from the drop down menu.

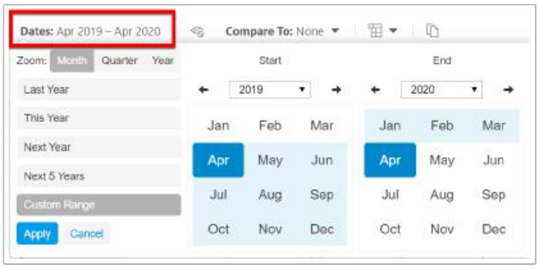


3. Select Currency

Before adding financial details, be sure you have the correct currency selected, if your organization has multiple currencies configured. Select the desired currency from the drop down menu.

4. Select Time Period Length & Date Range

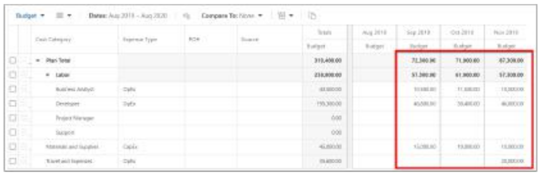
Select the desired time period length (monthly vs quarterly vs yearly) and date range that you will be adding financial values. Click the Apply button.



If you enter values into larger periods of time, such as into quarters or years, then switch to months, the values will be equally split across the months.

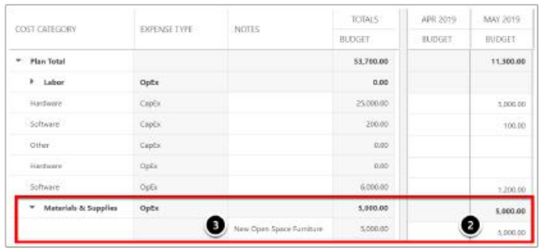
5. Add Financial Values

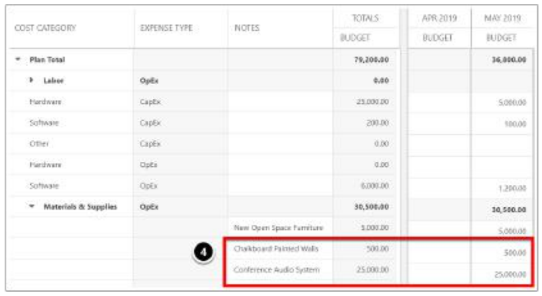
Add the cost values for the applicable cost categories and time periods. You can use the tab button and arrow keys for quicker entry into the cells.



5.1. Totals

1. There is a Totals column that show the total per cost category and each summary level row, such as Plan Total.
2. There is also a total row at the top of each time period column.
3. There is also a Period Total column to the far right of the Financial Planner that shows the totals of the time frame selected shown. You may choose to view only a few months in the Financial Planner, but the plan may be longer than the select view period.





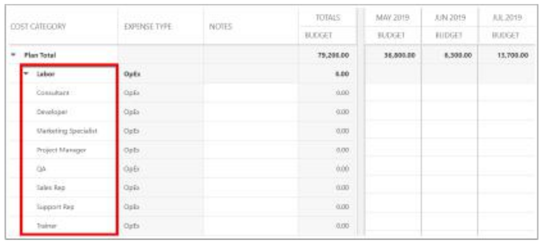
6. Add Detail Row

To track multiple rows for the same cost categories, use the Add Detail feature.

1. Select the menu icon for a cost category row, then Add Detail.
2. The cost category becomes a summary level row. Enter your costs on the child row.
3. To distinguish multiple rows within a cost category, you would typically enter details into the additional cost category fields to distinguish.
4. Repeat steps 1-3 for each additional detail row.

The Add Detail option is only available if Grouping is OFF.

7. Add Labor Costs

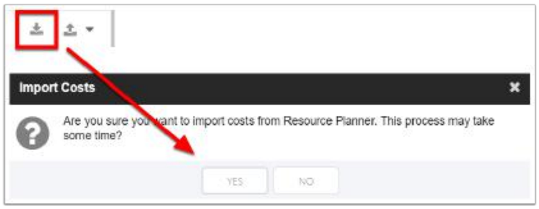


Rather than manually entering labor costs manually, you can import the labor financial values from elsewhere in the system. Your environment may be configured for each Financial Plan cost type to import labor costs. If no Import 'From' is configured for that cost type, the Import button will not show. An example use case could be that the Resource Plan hours imports into the Budget cost type, the resource schedule imports into the Forecast cost type, and the timesheet hours import into the Actuals cost type.

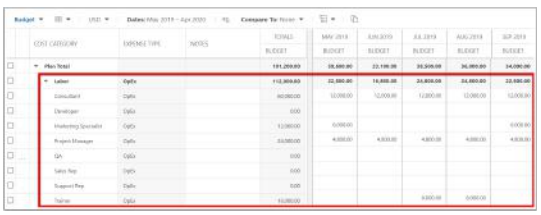
Build the Resource Plan. Then back in the Financials page, import the Resource Plan. The hours are multiplied by the rate (rates are managed in the admin settings) and converted to costs for each labor cost category. Typically, the labor cost categories are roles or something similar. Though, as OnePlan is flexible, another use of labor cost categories may be configured for your environment.

7.1. Resource Plan Hours

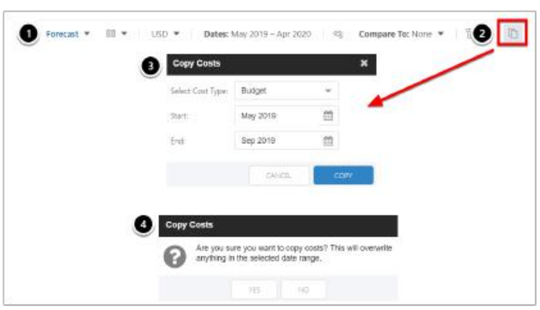
7.2. Import Costs

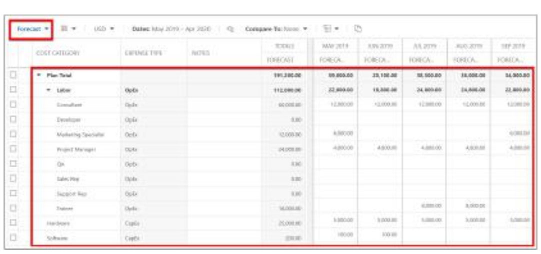


Be sure you're in the right cost type, then click on Import Costs. Verify the import by clicking the Yes button.



8. Copy Costs





You may copy costs from one cost type to another cost type. For example, once the budget is finalized and approved, you may want to maintain the ongoing estimated costs in the Forecast cost type. Or, as the plan is actively incurring costs, you can copy the original Budget into the Actuals cost type, then update as needed for each time period.

1. Go to the destination cost type.
2. Click the Copy Costs icon.
3. Select the source cost type and date range.
4. Verify to copy costs.

The values from all cost categories from the source cost type will copy into the destination cost type.

How do I get around the Financial Planner?

This article explains the navigation and terminology of the OnePlan Financial Planner.

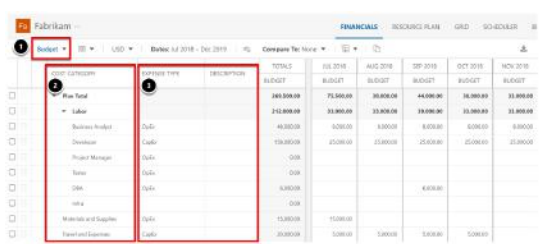
Heading

The Heading bar is where you may access the details of your plan and toggle between different planning modules for your plan.

Icon Menu

You will use these icons and menu options to change how your financial plan shows and to compare your financials for your plan.

Terminology & Use



1. Cost Types

Click the Cost Types drop down. Cost types allow organizations to calculate, evaluate and monitor what financial costs are planned, actually spent, and also financial gains. You can toggle from one cost type to another. A cost type may be editable or not. If not, the data is likely being imported from another financial system for reference.

Your organization may have similar or different cost types depending on business use cases and configuration. Here are some common general uses that may apply.

A Budget is the initial plan for what is estimated to be spent on this initiative. Expected costs are entered into cost categories. A cost category is how costs or gains are broken out into smaller defined categories. These are often organized as whether they are labor costs, and also whether they fall into expense type buckets, such as capital or operational expenses.

Once the Budget gets approved and a plan moves forward in the process, The Forecast costs are often used as the ongoing expected or estimated costs, updated as the plan or initiative continues. The forecast costs can be entered manually, or copied from another cost type, such as Budget. Then, updated as needed.

The Actuals cost type shows what has already been spent on the plan.

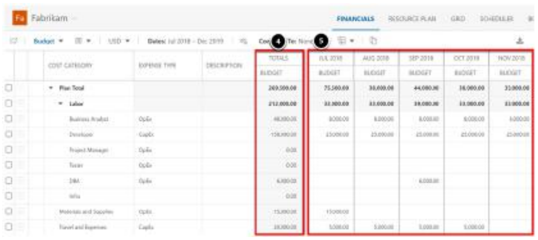
Another common example of a cost type is Benefits. This is where you would track what is expected to be gained from this plan. Notice the cost categories would be different in terms of what is gained vs another cost type for financials spent.

2. Cost Categories

Cost Categories, including Labor Cost Categories - Expected costs/financial values are entered into various cost categories. A cost category is how costs or gains are broken out into smaller defined classifications or groupings. The cost categories may differ per cost type. For labor cost categories, the number of hours entered into the Resource Plan can be imported as costs, calculated as hours x rate.

3. Cost Category Fields

The Cost Category Fields allow cost categories to be further grouped and clarified (i.e Expense Type & Description shown in the example above). Users may add detail rows to cost categories with additional information in the additional fields columns.



4. Cost Totals

The totals show per cost category, and than summary total for the whole plan.

5. Time-phased Cost Details

Costs are viewed and/or edited per time period shown. Based on the Dates menu selection, costs may be summed up or broken out in more or less details (i.e. daily, monthly, quarterly, yearly).

How do I use the OnePlan Financial Planner?

This article contains a video that shows how the Financial Planner works and how to use it.

Topics include:

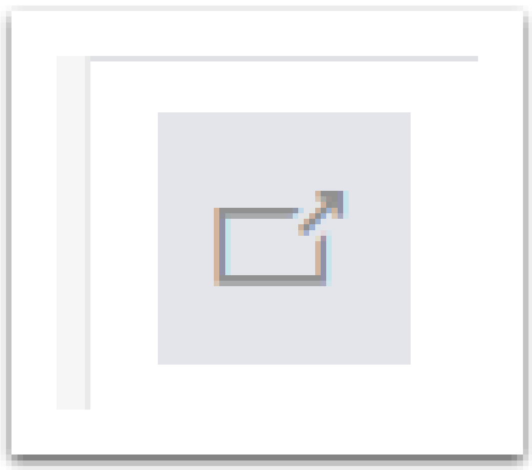
- Financial Plan terminology and navigation
- Menu options
- How to build a plan
- How to import
- How to export
- How to copy cost types

https://www.youtube.com/embed/djTSipZkQWc

What are the Financial Plan menu options?

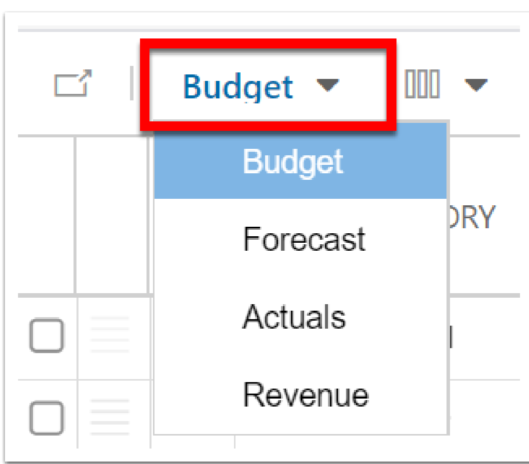
This articles explains the various menu options for viewing and building financial plans.

Submit



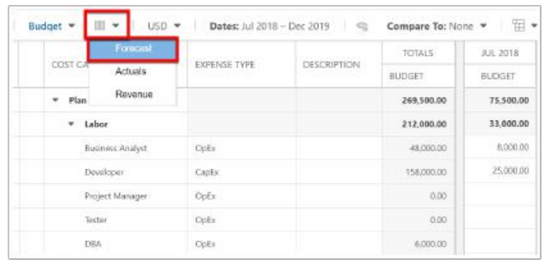
Select a row in the financial plan. Click the Submit button. If approvals are turned off, the row status will change to submitted. Should any data in the row change, the status will change back to unsubmitted.

Cost Types

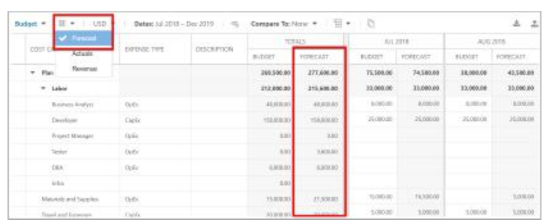


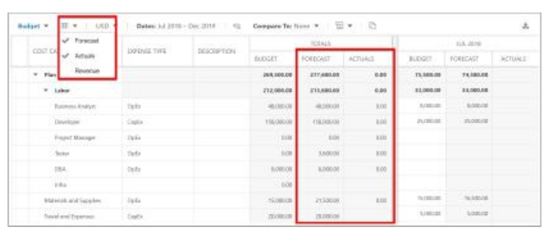
Select the Cost Types drop down menu to toggle to another cost type. When viewing any additional cost types or comparing cost types, the one selected in the Cost Types drop down menu is the one that remains editable (if it's an editable cost type).

Additional Cost Types

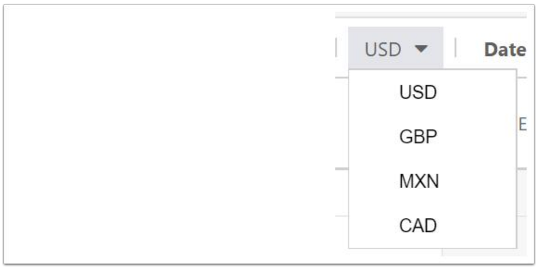


Should you want to see two or more cost types side-by- side, select the cost type from the Additional Cost Types button. Note, your main cost type is the editable one, whereas the additional cost type(s) will be view only. You would go to that other cost type to update it if needed. Each cost type selected will show side-by-side in the Totals section and each time-phased period.





Currencies



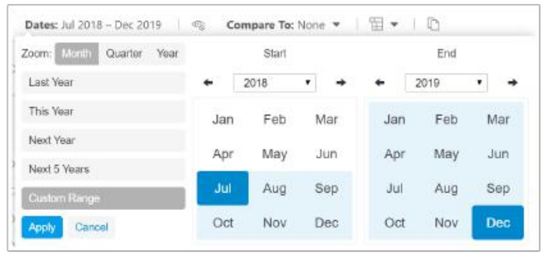
If your organization uses different currencies & has them configured, you can toggle between them here. The currency conversions are configured by the admin. Enter costs in the preferred currency. When you toggle to a different currency, the values will adjust per the currency conversion tables.

Dates

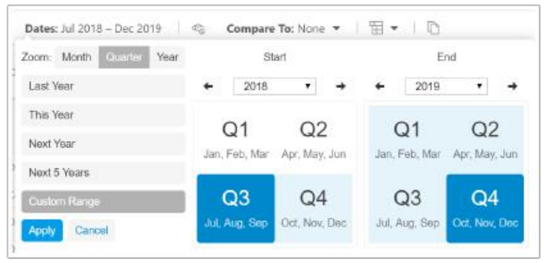
Change the Date Range of your view as needed. Select one of the preset date ranges such as Last Year, This Year, Next Year, or Next 5 Years.

Or, set a custom range, zoom to Months, Quarters, or Years, then select the time frame desired. Then, click the Apply button.

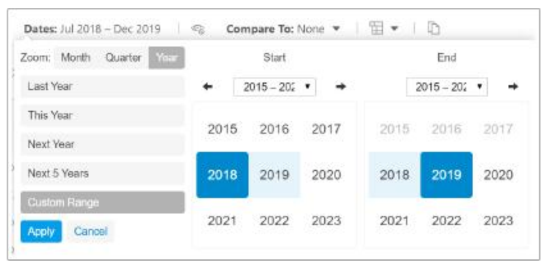
Monthly



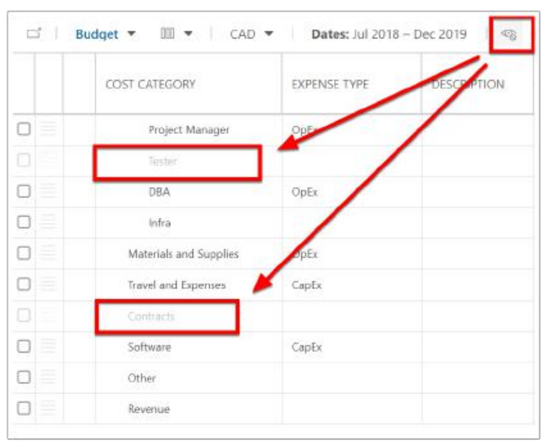
Quarterly



Yearly



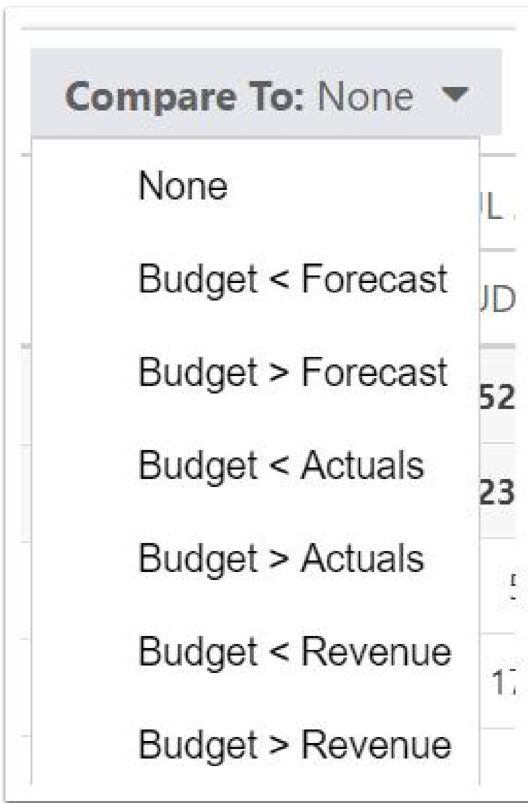
Show Hidden Cost Categories



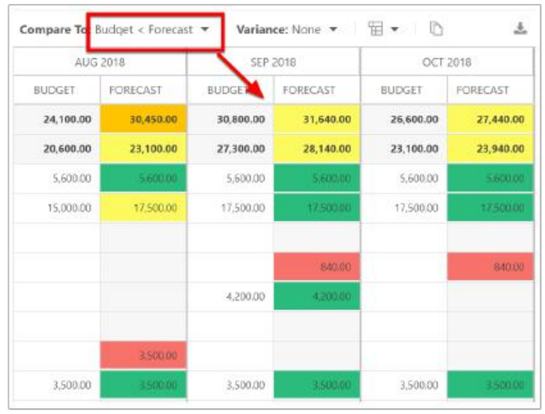
To see which rows are hidden or add them back in to your financial plan, click Show Hidden Categories to toggle showing them or not. The rows that were hidden are greyed out.

1. To show a row in the plan that had been hidden, click the menu for a hidden row and then Show Row.
2. To hide a row in the plan, click the menu for a row and then Hide Row.

Compare To (Cost Type)



Compare values across two cost types. Select Compare To, then two cost types to compare. You may only compare two cost types at a time.



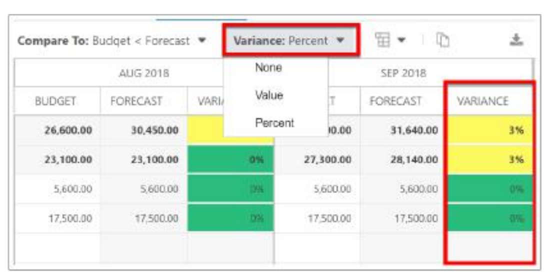
The values for both cost types will show side-by-side. Note, your main cost type is the editable one, whereas the comparison cost type(s) will be view only. If you change a value in the main cost type, the colors will update according to the variance rules in real-time. You would go to that other comparison cost type to update it if needed. Each cost type selected will show side-by-side in the Totals section and each time-phased period. The carrot direction determines whether the greater than or less than will determine the logic for the color scale green or red. In the example above "Budget < Forecast," the forecast column will turn yellow then red when the forecast is greater than the budget cost type. Here is the formula for when the colors change:

The calculation currently is |value1-value2|/((value+value2)/2)*100

Colors are (based on the percentage variance):

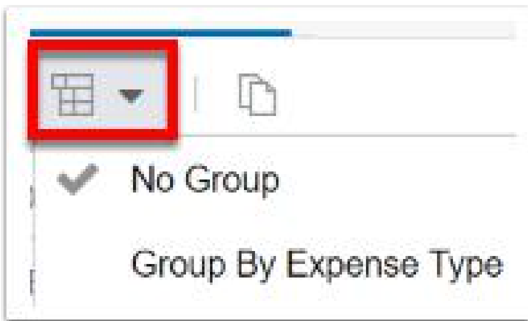
- >120% red
- >110% Orange
- >100% yellow
- <= 100% green

Variance



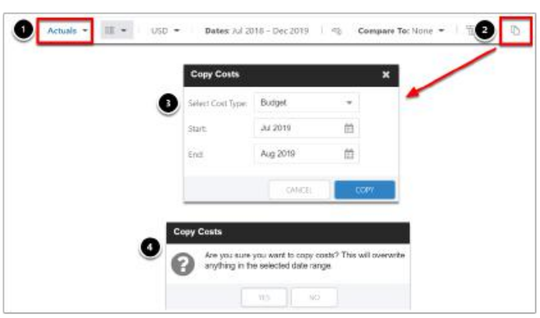
When comparing cost types, you may select a type of variance to show. Select the Variance drop down for the options: None, Value, or Percent. When a variance type is selected, the colored cells become the variance column rather than the comparison cost type column.

Grouping



To change the grouping select either No Group or Group By "_____". The default grouping field (if any) is set by your admin. Typically, the additional choice Cost Category fields are available to select for grouping.

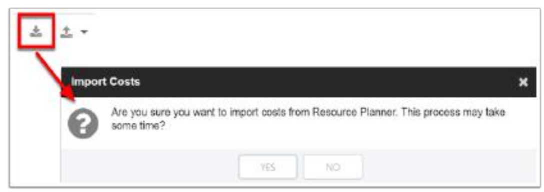
Copy Cost Type



You may copy costs to another cost type as well. For example, once the budget is finalized and approved, you may want to maintain the ongoing estimated costs in the Forecast cost type. Or, as the plan is active incurring costs, you can copy the original budget into the Actuals cost type, then update as needed for each time period. You can copy from any one cost type to another.

1. Go to the destination cost type.
2. Click the Copy Costs icon.
3. Select the source cost type and date range.
4. Verify to copy costs. The values from all cost categories from the source cost type will copy into the destination cost type.

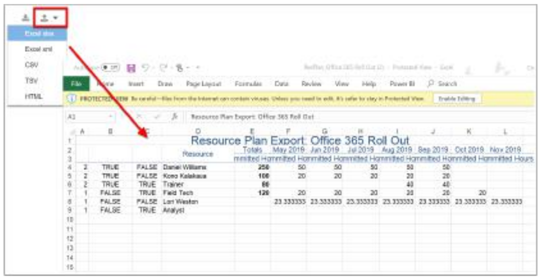
Import Costs



When needed, costs can be imported from elsewhere in the system. For example, importing the committed resource plan hours into budgeted labor costs, or timesheet actual hours into the actual labor costs. Rather than manually entering labor costs, build the Resource Plan. Here the resource plan is filled out. Then back in the Financials page, import the hours, which are converted to costs with each role's rate.

Be sure you're in the right cost type, then click on Import Costs & Yes.

Export Costs



To export, first select the desired cost type, dates, and content to view. Then select your desired format from the Export menu.

Reports

Create, Update, and Submit Status Reports

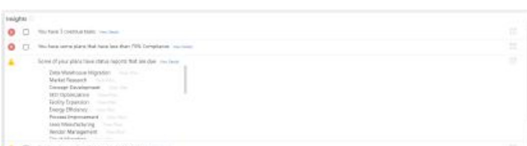
This article explains how to open, update, and submit status reports. This article assumes that your OnePlan Administrator has already configured Status Reports for your OnePlan environment.

One of the nice things about OnePlan is that you can centralize all your work and initiatives into One Plan and allow managers to create and submit a standard status report.

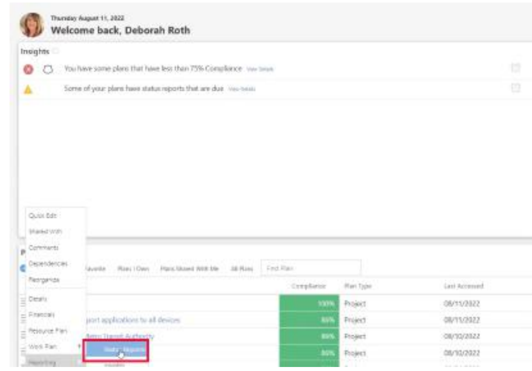
Access Your Status Report

There are several ways you can access your status reports:

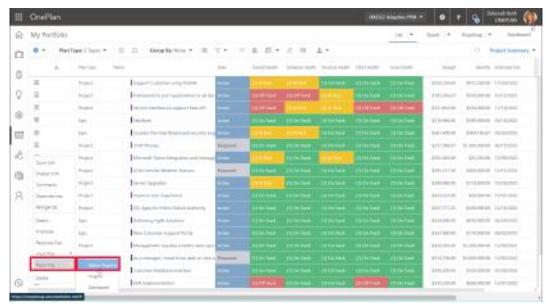
- **Home Page - Insights:** If a status report is due or ready for submission and approval you'll notice it in your insights. Here you see I have a message that some of my plans have status reports that are due. Click on **View Details** to see all of the status reports that require your attention. Then click **View Plan** to access the status report for that plan.



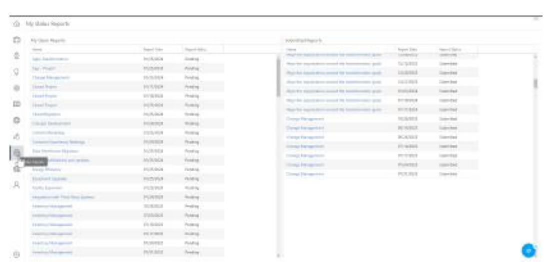
- **Home Page - Plans**: Or you can navigate to your plans by clicking the hamburger, go to reporting and select status reports to display the status report that requires my attention (scroll to the lower part of the report to show that I need to update the status based on the information that has already been entered into OnePlan (like project information and financials.)



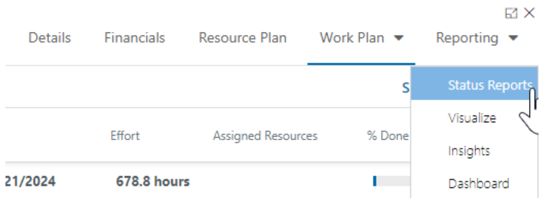
- **My Portfolio**: Or, if you have access to your organization's portfolio, you can navigate to the portfolio view (click portfolio view), find your plan within the portfolio view, again, clicking on the hamburger, click reporting click status reports.

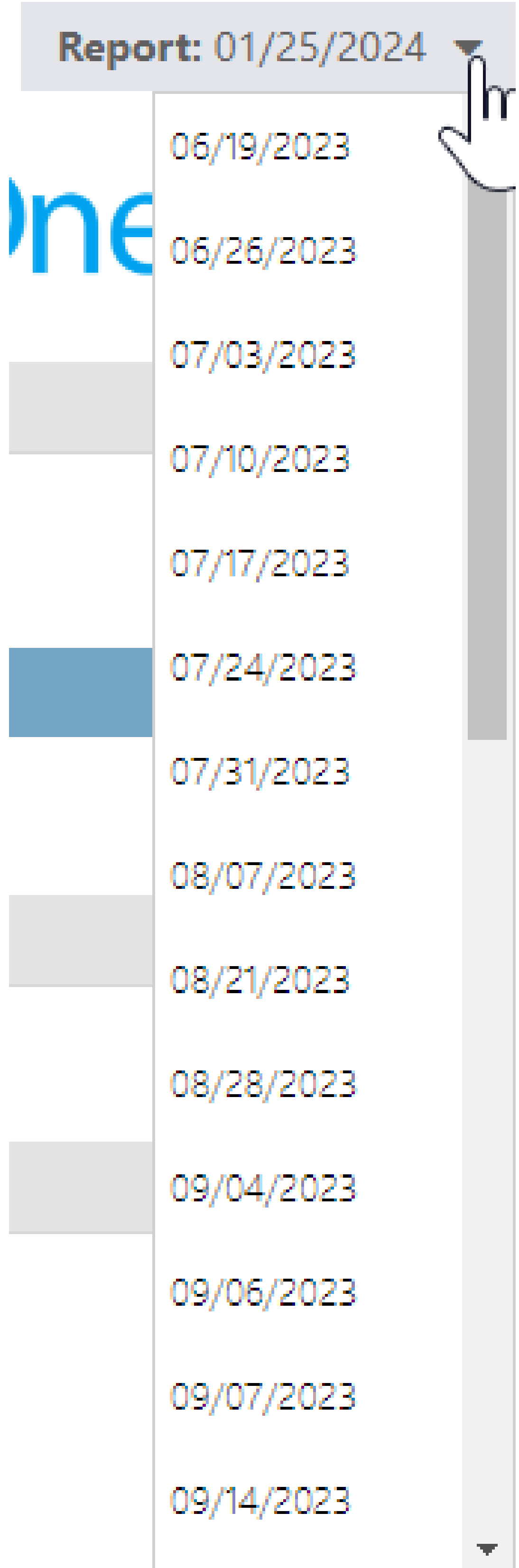


- **Status Report Area**: We have a status report view here on the main navigation menu. If you click here, you're going to see a view that shows you a view of all open reports that you need to complete, review or submit to management for approval or, if you are in the manager role, have reports waiting for you to approve and send back to your PMs



- **Plan - Reports Tab**: If you are working in a plan, you can also access the status report by clicking on the Reports tab, and selecting Status Reports from the drop-down menu.



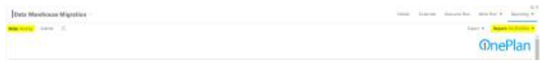


Create a New Status Report

If you have not created a status report for your plan previously, and are running the report for the very first time, you will need to click **Create Report**. This will run the status report and generate a new report for you. The status report will then run on the schedule set up on the back end of OnePlan by your Administrator.

Update Your Status Report

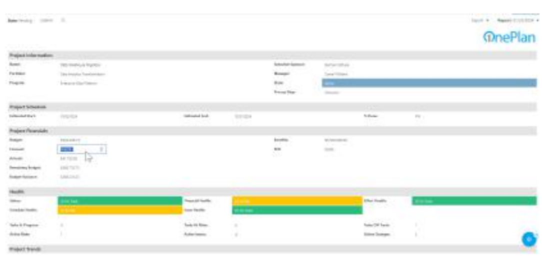
The first thing you'll see in the upper right hand corner is that you can have snapshots of these status reports. From this drop-down, you can access all of your current and historical status reports. In this example, the status report for 1/25/2024 is Pending, and needs to be reviewed, updated, and submitted.



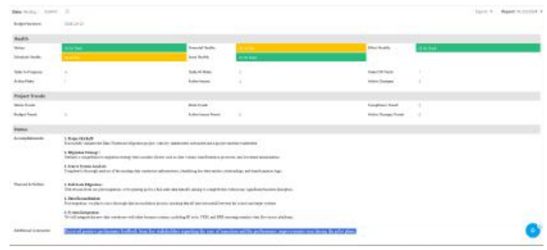
Basically what OnePlan does is it generates a status report based on the current data in your plan. What's nice about this is that you can actually come into your pending status report and make modifications before you submit it. Any changes that you make in the status report will also be reflected in the plan itself, so your data is accurate across the board.

You are able to edit any editable field available in the status report. So, for this example, I may need to update the Status Health of my plan before I submit this report. I can simply click into the Status Health field, and select the correct value. This updated Status Health value will also be reflected in the live plan as well.

Perhaps I need to update the Forecast value in this status report. I can click into the Forecast field and update this value. Again, this value will also be updated in the plan itself.



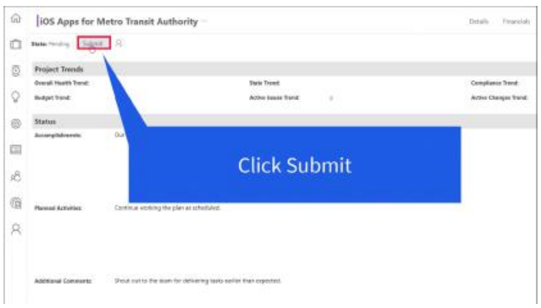
Finally, maybe I would like to add some additional comments into the status report, I can enter those comments into the Additional Comments field, and those comments will be tracked as your plan progresses and future status reports are generated.



Submit Your Status Report

Once you have your status report set up and updated the data, you can now submit this report to your manager.

To submit the status report, simply click **Submit**. Then confirm the submission in the pop-up. The status report will be sent off to the required reviewers for their review and approval.

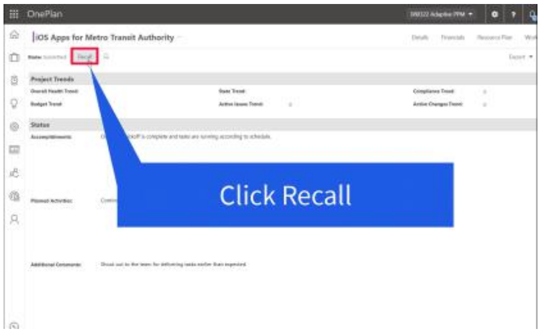


Once submitted, OnePlan will lock down the status report so now you can no longer update, add or make changes to this status report.

Recall Your Status Report

You can recall a status report before a manager approves it. So if you forgot something, you can come back and recall it. As soon as a manager approves it, that report becomes the official status report for that period.

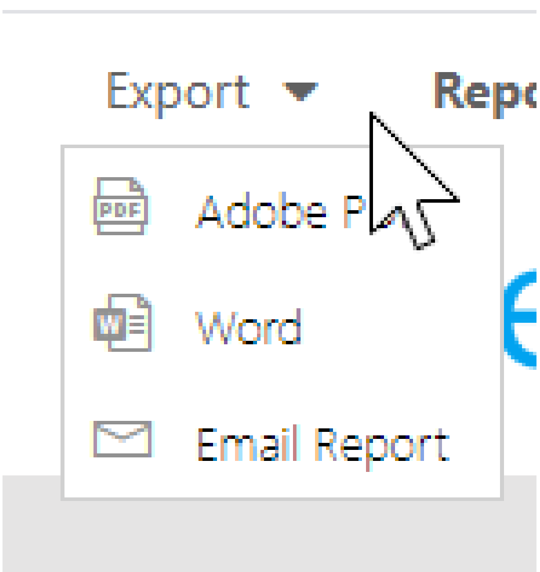
To recall a status report, simply click **Recall**.



Export Your Status Report

Once your status report has been approved, you may want to export the report so you can share it with other stakeholders who may not be using OnePlan. You can export the report as a Word document, PDF, or in an email.

To export a status report, click **Export**, then select your desired format from the drop-down. The report will then download into your downloads folder, or an email will generate.



How do I access Power BI dashboards/reports?

This article explains how to view the OnePlan reporting dashboard in OnePlan. You may also go into PowerBI online to access the reports as well.

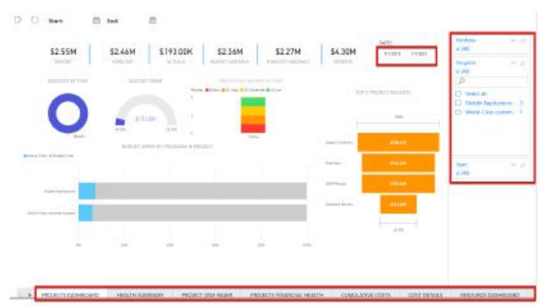
If you don't see anything on the Dashboard page, your admin may need to configure the Dashboard for your OnePlan Portfolios Dashboard page and/or Plan Dashboard page.

See Set up the Reporting Dashboard for instructions to set up the OnePlan reporting dashboard.

Portfolio Dashboard

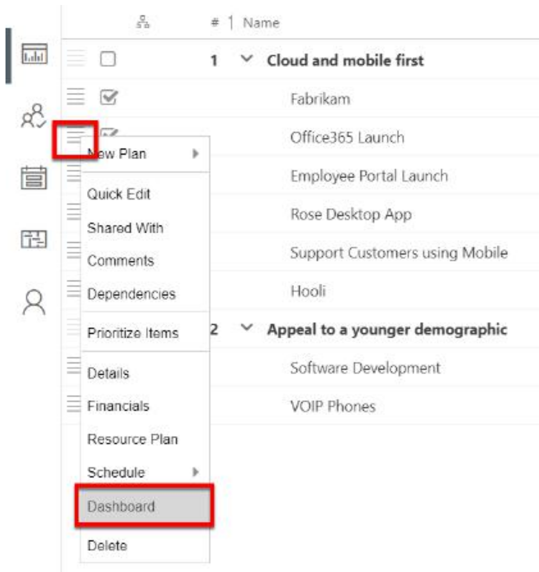
Navigate to the Portfolios module. Select **Dashboard** view. The report opens. You may need to authenticate for Power BI. Click **Sign-In**. If you don't yet have a PowerBI license, you can start a trial of PowerBI.

Select the various tabs to see additional reporting details. Select filters as needed. Click on visuals to further dive into the data.



Plan Dashboard

From the Portfolios List page, open the contextual menu for a plan. Select **Dashboard**.



View Plan Insights

This article describes how to access and view plan-level insights. Insights notify you about plan items that require attention. Insight scores are generated so managers can easily track compliance to best practices.

Open Plan Insights

1. Go to your desired plan.
2. From the plan navigation, select **Reporting** > **Insights**. The plan insights page will open.

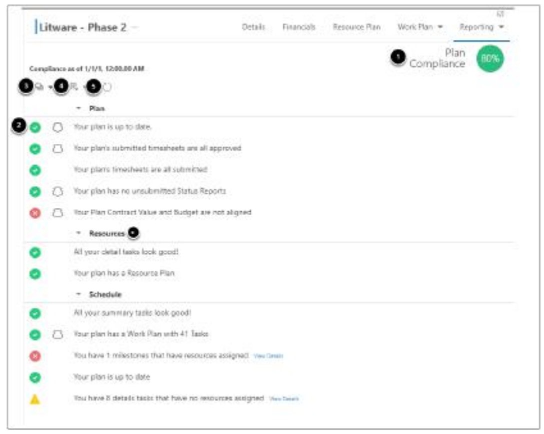
Insight Descriptions

In the insights page, you can view all plan insights and the plan compliance score.

1. **Plan Compliance Score:** Calculates the number of open (information, warnings, or problems) compliance insights divided the total number compliance insights.
2. **Insights List:** Lists all insights for the current plan.
3. **Trigger Level Filter:**Allows you to filter the insights list by insight type. Types include:
   - **Success:** The item has been addressed and completed. Marked with the green circle with a check icon.
   - **Information:** The item is for information only. There are no actions that need to be taken. Marked with the blue circle with an ! icon.
   - **Warnings:** The item is an issue, but is not urgent. If not addressed, the warning will be escalated to a problem. Marked with the yellow triangle with an ! icon.
   - **Problems:** The item is causing issues for the plan and must be addressed. Marked the red circle with an X icon.

     NOTE: Items marked with the shield icon are compliance insights and are counted in the plan compliance score.
4. **Insight Category Filter:** Allows you to filter insights by categories*.

   NOTE: Categories are customizable and will vary.
5. **Refresh Insights:** Refreshes the insights list in real time.



Visualizer Overview

This article provides an overview of the Visualizer module for OnePlan Reporting.

The Visualizer module is a feature of OnePlan plans that enables users to easily view plan dependencies and relationships.

To use the Visualizer, your OnePlan administrator must first set it up. See Set Up Visualizer for instructions.

Video Length - 5:37

https://player.vimeo.com/video/766556084

Access the Visualizer

> **NOTE**
>
> The Visualizer module is added to individual plan types and process flow steps within the plan details form. You must be in the correct plan type and process flow step to access the Visualizer module. Consult your OnePlan administrator for a list of plan types and process steps where the Visualizer module is available in your OnePlan environment.

1. Go to the desired plan. Be sure that the plan is in a process flow step where the Visualizer module is available.
2. Go to **Reports** > **Visualizer**. The Visualizer module will open.

Get Around the Visualizer

The dots represent plans. You can select how the dots are colored based certain plan data such as **# of Backlog Tasks**, **% Done**, and more. This makes it easy to see if plans are getting off track, or may cause issues for its associated plans.

The lines represent the relationships between the plans.

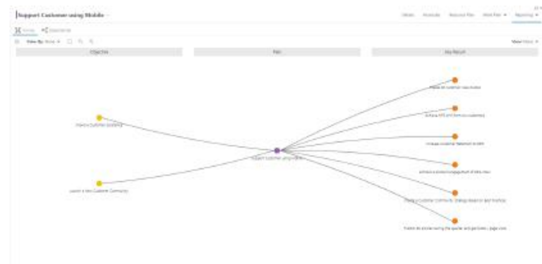


Table 4. Visualizer Icons and Menus

Icon / Menu	Name	Description
Runway	Runway view	Click to access the Runway view.
Dependencies	Dependencies view	Click to access the Dependencies view. This is the default Visualizer view.
	Configuration	Only available in the Runway view. Click to configure the columns in the Runway view.
Color By: None	Color By menu	Select the plan field to drive the dot coloration in the Visualizer.
	Refresh	Click to refresh the Visualizer.
	Zoom Out	Click to zoom out.
	Zoom In	Click to zoom in.
View: None	View menu	Only available in the Runway view. Select, save, or delete custom view configurations for the Visualizer.

Dependencies View

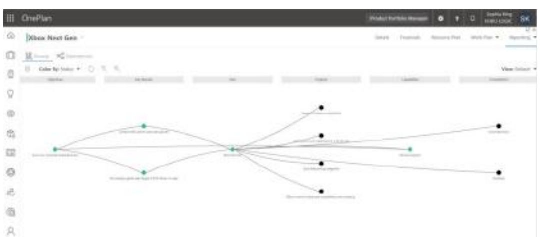
The Dependencies view allows you to visualize your plan successors and dependencies. This allows for better understanding your predecessors and successors and communicating changes and risks to other plan managers.

See Use the Visualizer Dependencies View [236] for instructions on how to use the Dependencies view.

Runway View

The Runway view allows you to better visualize relationships between other plans. For example, you could visualize all of the Objectives, Key Results, Value Streams, Products etc. that are associated to your Project.

See Use the Visualizer Runway View [237] for instructions on how to use the Runway view.



Use the Visualizer Dependencies View

This article explains how to use the Dependencies view of the Visualizer module.

The Dependencies view allows you to visualize your plan successors and dependencies. This allows for better understanding your predecessors and successors and communicating changes and risks to other plan managers.

The Dependencies view has three columns: **Predecessors**, **Plan**, and **Successors**.

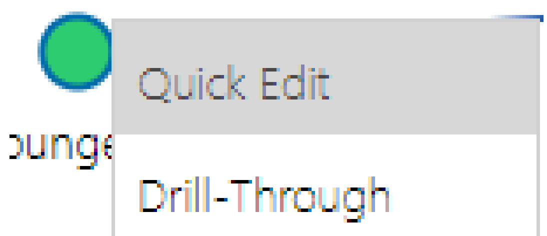
- Predecessors are plans that must begin or end before the current plan can begin.
- Plan is the current plan you are analyzing.
- Successors are plans that follow (are dependent on) the current plan.

The dots within each column represent a plan in your OnePlan portfolio.

The lines represent the relationship between the plans in your portfolio. The lines in the Dependencies view have arrows indicating the direction of the relationship, pointing towards successors.

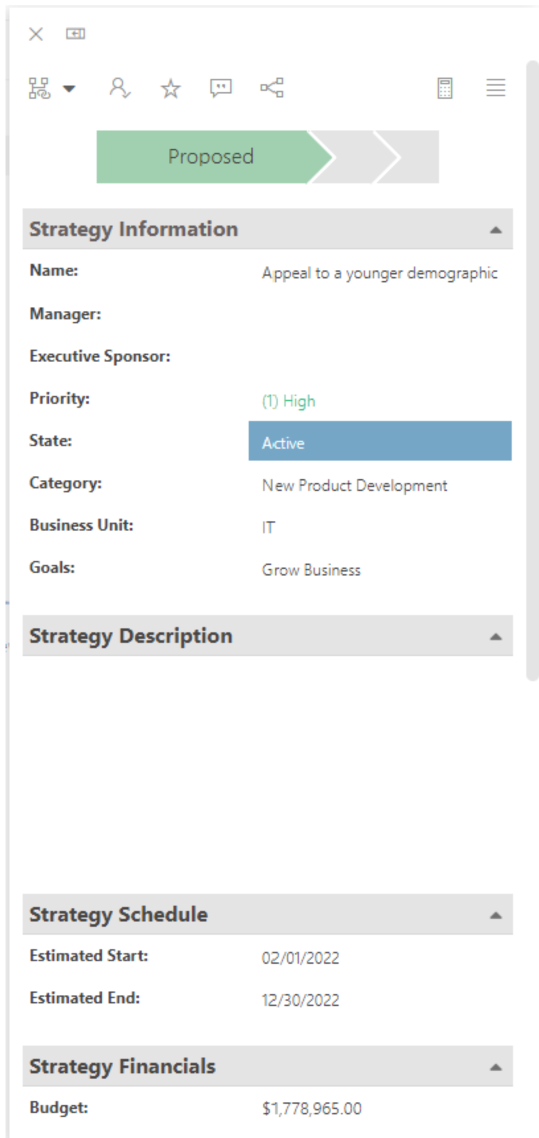
Contextual Menu Actions

Click on a dot to access the contextual menu. From this menu, you can access the plan's Quick Edit form, or drill through for more dependency information.



Quick Edit

Select **Quick Edit** from the contextual menu to open the Quick Edit form for the plan. The Quick Edit form will open on the right side of the screen.



Drill-Through

Select **Drill-Through** from the contextual menu to view the dependencies for the selected plan in the Visualizer. This will place the selected plan in the Plan column of the Visualizer, and display the plan's predecessors and successors.

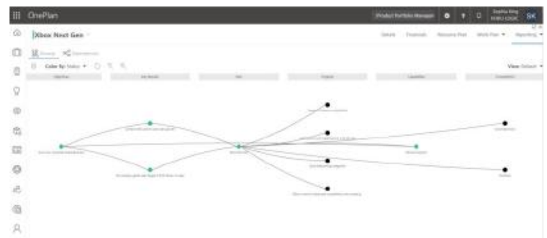
Use the Visualizer Runway View

This article explains how to use the Runway view of the Visualizer module.

The Runway view allows you to better visualize relationships between other plans. For example, you could visualize all of the Objectives, Key Results, Value Streams, Products etc. that are associated to your Project.

The dots within each column represent a plan in your OnePlan portfolio.

The lines represent the relationship between the plans in your portfolio.

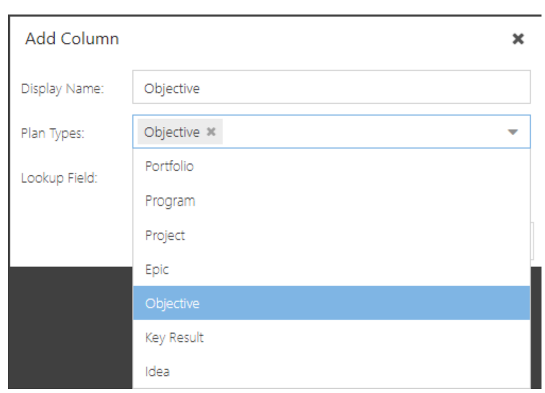


Configure the Columns

The columns in the Runway view are configurable so you can view the relationships that are important to you.

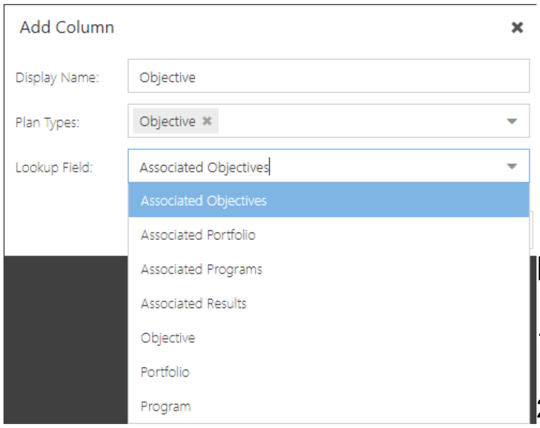
Add Columns

1. Click on the **Configure** icon . The **Configure** form will open.
2. Click the **Add** icon to create a new column. The **Add Column** form will open. Complete the form.
   a. **Display Name**: Enter the display name for the new column.
   b. **Plan Types**: Select the plan type(s) you would like to display.



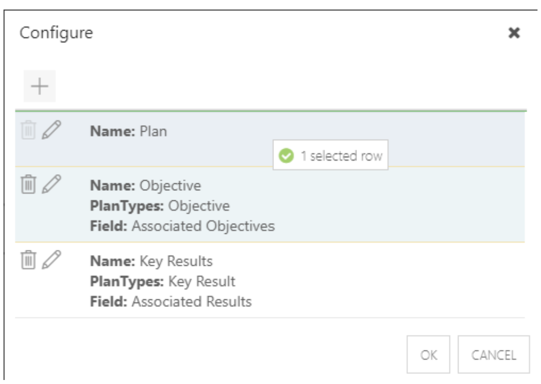
   c. **Lookup Field**: Select the lookup field that associates your current plan with the selected plan type.

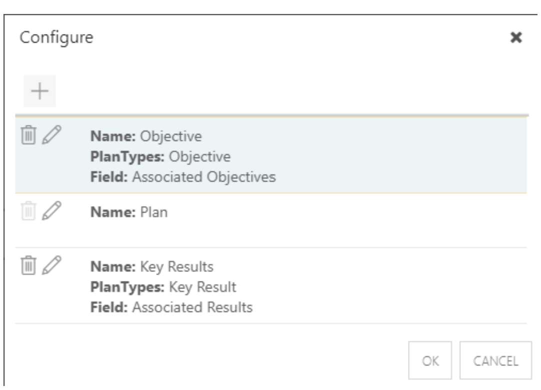
For example, I am adding an **Objective** column that will show objectives related to the current plan. These objectives are associated to the current plan through the **Associated Objectives** field.



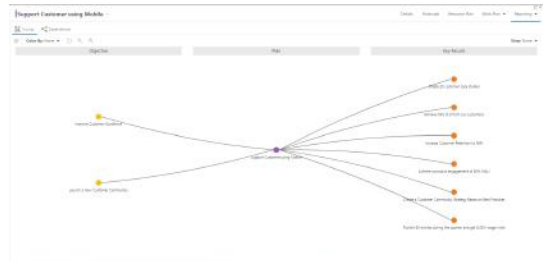
d. Click **Ok** to create your new column.

3. To rearrange the column display order, select a column from the **Configure** form, and drag and drop it into the desired location. The top column in the list will be on the left of the screen, and the last column will be on the right of the screen.



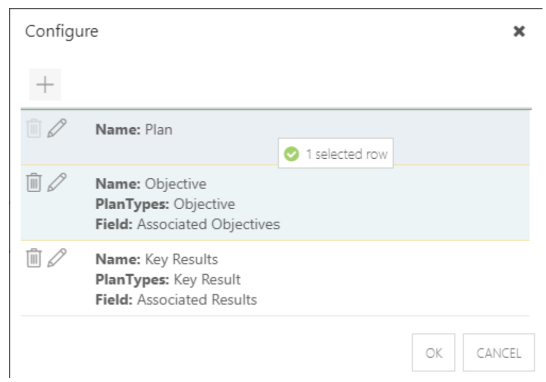


4. When your configuration is complete, click **OK**. Your new column configuration will display in the Visualizer.

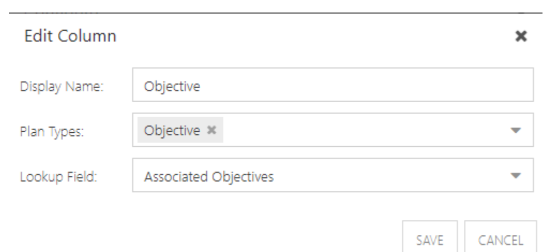


Edit Columns

1. Click on the **Configure** icon . The **Configure** form will open.
2. You can drag and drop columns in the **Configure** form to update their display order.



3. To edit the details of a column, click the **Edit** icon next to the desired column. The **Edit Column** form will open.



4. Update the column details as necessary. Click **Save** to apply the changes.

Custom Views

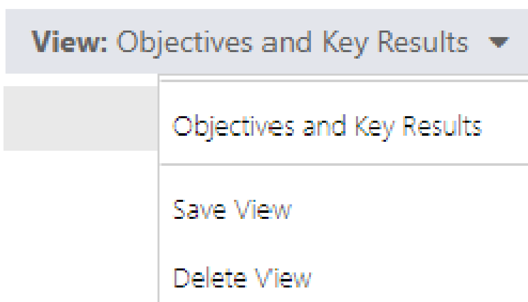
You can save custom views of the Visualizer for easy access using the **Views** menu.

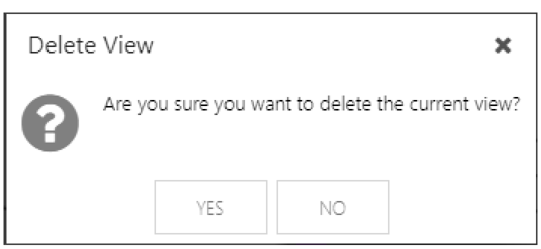
Save Views

1. Complete Configure the Columns [237].
2. Click the **Views** menu, and select **Save View**.The **Save View** form will open.
3. Complete the **Save View** form.
   - **View Name**: Enter a name for the new view.
   - **Default View**: Check the check box if this will be the default view for the Visualizer.
   - **Personal View**: Check the check box if this is a personal view for your use only.
4. Click **Save**. The view will now be available for use from the **Views** menu.

Delete Views

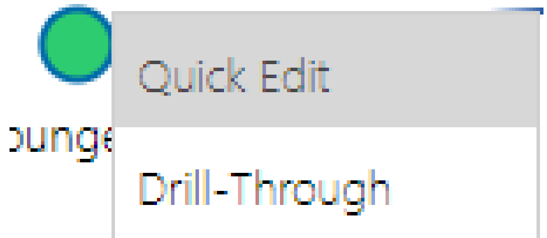
1. Go to the **Views** menu and select a view. The view will load in the Visualizer.
2. Go to the **Views** menu and select **Delete View**. A confirmation will pop up. Click **Yes** to delete the view.





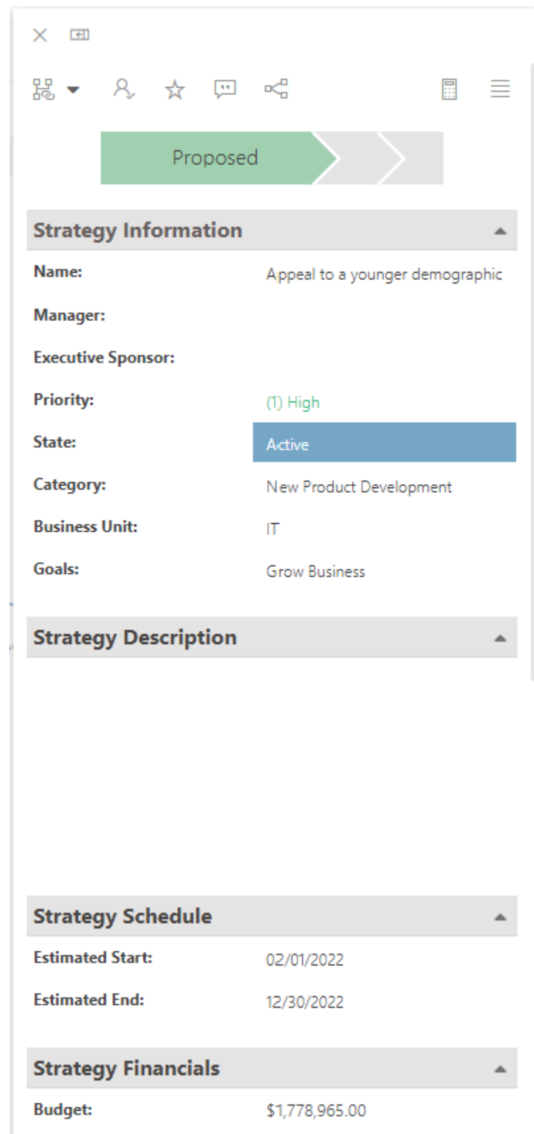
Contextual Menu Actions

Click on a dot to access the contextual menu. From this menu, you can access the plan's Quick Edit form, or drill through for more dependency information.



Quick Edit

Select **Quick Edit** from the contextual menu to open the Quick Edit form for the plan. The Quick Edit form will open on the right side of the screen.



Drill-Through

Select **Drill-Through** from the contextual menu to view the dependencies for the selected plan in the Visualizer. This will place the selected plan in the Plan column of the Visualizer, and display the plan's predecessors and successors.

Resource Center

Resource Center Overview

Invite new users to your OnePlan environment, and manage your pool of resources and teams using the **Resource Center**.

Watch the Resource Center Overview Video

The following video provides a walk through on the OnePlan Resource Center, as well as how to add resources to OnePlan.

https://player.vimeo.com/video/954127343

Related Resources

For more information on the OnePlan Resource Center, check out the following resources:

- Add Users to OnePlan
- Create and Manage Teams in the Resource Center
- Allocate Resources to Teams (Total Percentage and Time-Phased Allocation)
- Manage Resource Notification Settings
- Resend a OnePlan Invite
- Remove a user from the license count

Add Users to OnePlan

This article explains how to add users/resources to your OnePlan environment.

Create Named Resources

With Office365 Strict Authentication

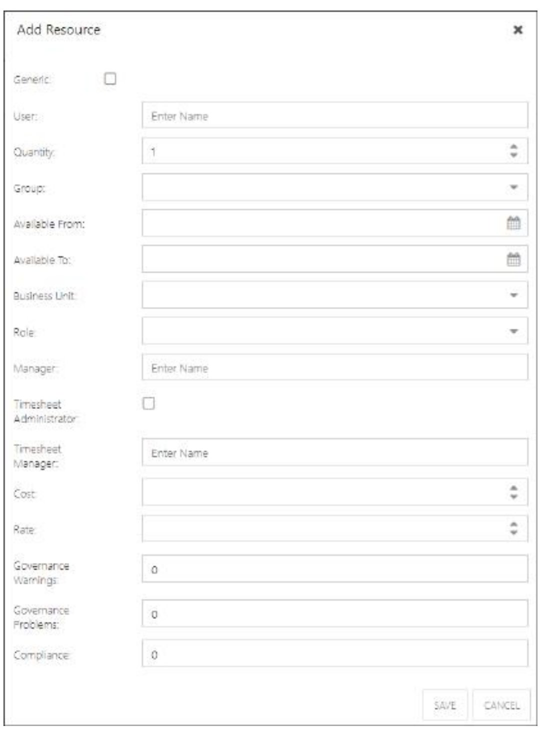
If you are adding a new user who is part of your Entra/Office 365 tenant, and your organization has Office365 Authentication enabled, follow these instructions.

1. Go to the **Resource Center**.
2. Click **Add Resource**. The **Add Resource** form will open.
3. Complete the **Add Resource** form.
    - **Generic**: Leave the check box unchecked if the resource is a named user.
    - **User**: Begin typing the name of the user. The available names will authenticate based on user accounts in your Azure/Office365 tenant. Select the user name.
    - **Quantity**: 1 signifies 1 FTE, or one full-time resource. Full-time is all working hours based on the Calendar settings. 0.5 would signify a part-time resource who is available 1/2 time. This affects the resource's capacity.
    - **Group**: Select the appropriate Enterprise Security Group for this new user. Out of the box, OnePlan comes with the following Enterprise Security Groups, with the following permissions:
        - **None**: Does not have access to OnePlan
        - **Team Member**: Can view and edit plans or tasks assigned to them
        - **Contributor**: Can create, view, and edit their own plans
        - **Executive**: Can view all plans (and content for those plans)
        - **Manager**: Can view and edit all plans (and content for those plans)
        - **Owner**: Can view and edit all plans (and content for those plans); can modify OnePlan configuration (Admin)
    - **Business Unit**: Select the business unit. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
    - **Role**: Select primary role. Available role choices are configured on the Fields page, in the section for resource-level fields.
    - **Manager**: Begin typing the name of the manager for this user. Select the desired name.
    - **Timesheet Administrator**: (This field only shows when the Timesheet App has been added). Select this check box if this user is a timesheet administrator.
    - **Timesheet Manager**: (This field only shows when the Timesheet App has been added). Begin typing the name of the timesheet manager for this user. Select the desired name.
    - **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.

- **Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page). Rate is the amount that you bill out for the resource.
- **Governance Warnings, Governance Problems, Compliance**: These fields are not editable. They are related to Insights, and display the number of governance warnings and problems and a calculated compliance score. Skip.

4. Click **Save**. The new user will be available throughout OnePlan. The user will also receive an invitation email from OnePlan informing them that they have been added to the OnePlan group, as well as a link to the group. The user can then use their Office 365 credentials to access OnePlan.

> **NOTE**
> Any additional fields that are configured as resource-level fields on the Fields page will show on the Add/Edit Resource forms.



With Multi-Authentication Enabled and the User is part of your Entra/Office 365 Tenant

> **NOTE**
> Multi-Authentication must be enabled in order to add users with this method. See Enable OnePlan Multi-Authentication for instructions.

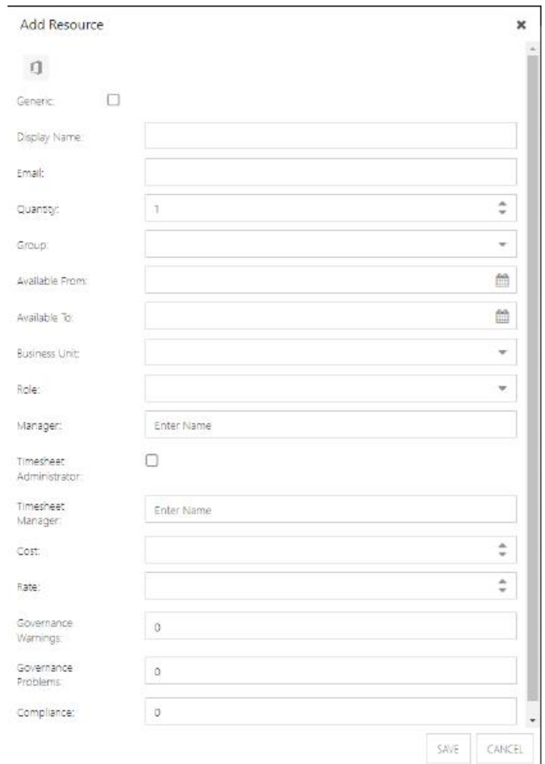
If you are adding a new user who is part of your Entra/Office 365 tenant, and your organization has Multi-Authentication enabled, follow these instructions.

1. Go to the **Resource Center**.
2. Click **Add Resource**. The **Add Resource** form will open.
3. Complete the **Add Resource** form.
   - Click the **Entra** icon. Search for and select the user you would like to add to OnePlan.

   - **Generic**: Leave the check box unchecked if the resource is a named user.
   - **Quantity**: 1 signifies 1 FTE, or one full-time resource. Full-time is all working hours based on the Calendar settings. 0.5 would signify a part-time resource who is available 1/2 time. This affects the resource's capacity.
   - **Group**: Select the appropriate Enterprise Security Group for this new user. Out of the box, OnePlan comes with the following Enterprise Security Groups, with the following permissions:

    - **None**: Does not have access to OnePlan
    - **Team Member**: Can view and edit plans or tasks assigned to them
    - **Contributor**: Can create, view, and edit their own plans
    - **Executive**: Can view all plans (and content for those plans)
    - **Manager**: Can view and edit all plans (and content for those plans)
    - **Owner**: Can view and edit all plans (and content for those plans); can modify OnePlan configuration (Admin)
  - **Business Unit**: Select the business unit. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
  - **Role**: Select primary role. Available role choices are configured on the Fields page, in the section for resource-level fields.
  - **Manager**: Begin typing the name of the manager for this user. Select the desired name.
  - **Timesheet Administrator**: (This field only shows when the Timesheet App has been added). Select this check box if this user is a timesheet administrator.
  - **Timesheet Manager**: (This field only shows when the Timesheet App has been added). Begin typing the name of the timesheet manager for this user. Select the desired name.
  - **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
  - **Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page). Rate is the amount that you bill out for the resource.
  - **Governance Warnings, Governance Problems, Compliance**: These fields are not editable. They are related to Insights, and display the number of governance warnings and problems and a calculated compliance score. Skip.
4. Click **Save**. The new user will be available throughout OnePlan. The user will also receive an invitation email from OnePlan informing them that they have been added to the OnePlan group, as well as a link to the group. The user can then use their Office 365 credentials to access OnePlan.

> **NOTE**
> Any additional fields that are configured as resource-level fields on the Fields page will show on the **Add/Edit Resource** forms.



With Multi-Authentication Enabled and the User is an External Resource (Using an External Email)

> **NOTE**
> Multi-Authentication must be enabled in order to add users with this method. See Enable OnePlan Multi-Authentication for instructions.

If you are adding a new user who is NOT part of your Entra/Office 365 tenant, follow these instructions.

1. Go to the Resource Center.
2. Click Add Resource. The Add Resource form will open.
3. Complete the Add Resource form.
   - **Generic**: Leave the check box unchecked if the resource is a named user.
   - **Display Name**: Enter a display name for the user. This will be the name shown in the top right corner of OnePlan, as well as in Resource Plans, Work Plans, etc.
   - **Email**: Enter the email address for the new user. This will be the email address where this user will receive news and notifications from OnePlan.
   - **Quantity**: 1 signifies 1 FTE, or one full-time resource. Full-time is all working hours based on the Calendar settings. 0.5 would signify a part-time resource who is available 1/2 time. This affects the resource's capacity.
   - **Group**: Select the appropriate Enterprise Security Group for this new user. Out of the box, OnePlan comes with the following Enterprise Security Groups, with the following permissions:
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     - **Owner**: Can view and edit all plans (and content for those plans); can modify OnePlan configuration (Admin)
   - **Business Unit**: Select the business unit. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
   - **Role**: Select primary role. Available role choices are configured on the Fields page, in the section for resource-level fields.
   - **Manager**: Begin typing the name of the manager for this user. Select the desired name.
   - **Timesheet Administrator**: (This field only shows when the Timesheet App has been added). Select this check box if this user is a timesheet administrator.
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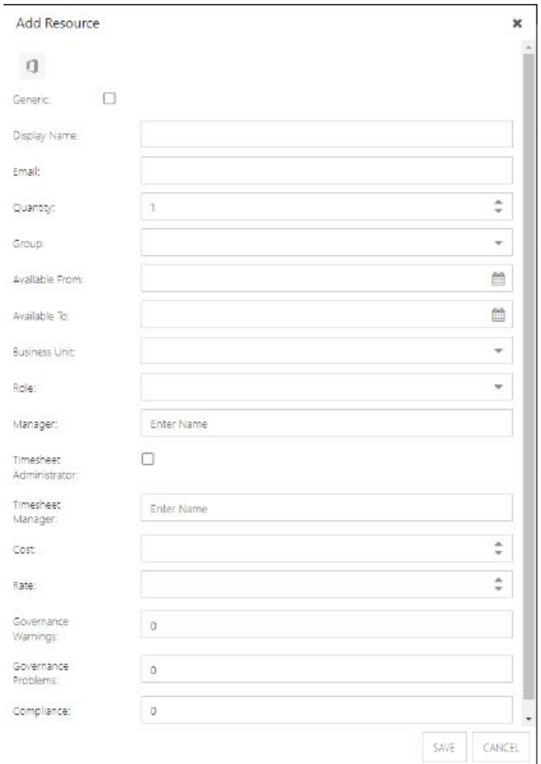
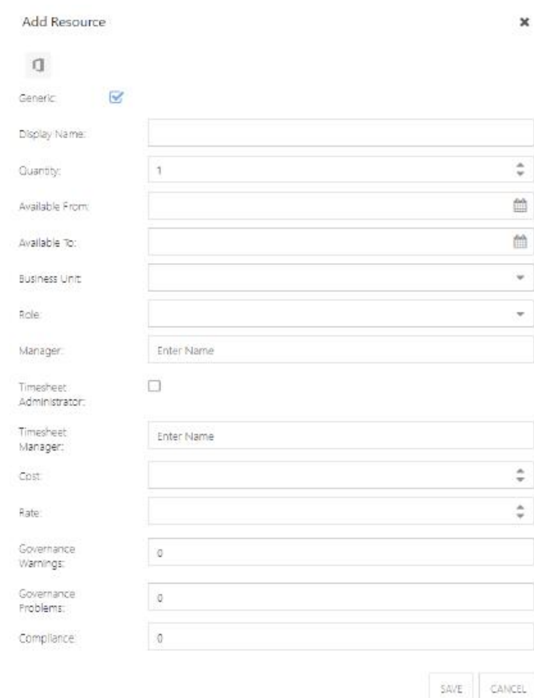
   - **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
   - **Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page). Rate is the amount that you bill out for the resource.
   - **Governance Warnings, Governance Problems, Compliance**: These fields are not editable. They are related to Insights, and display the number of governance warnings and problems and a calculated compliance score. Skip.
4. Click **Save**. The new user will be sent a link in their email to finish setting up their OnePlan account. See Create a OnePlan Account for instructions.

> **NOTE**
> Any additional fields that are configured as resource-level fields on the Fields page will show on the **Add/Edit Resource** forms.



Create Generic Resources

1. Go to the **Resource Center**.
2. Click **Add Resource**. The **Add Resource** form will open.
3. Complete the **Add Resource** form.
   - **Generic**: Select the check box if the resource is generic.
   - **Display Name**: Enter the generic resource name. Typically, this is something like a role name or something similar.
   - **Quantity**: 1 signifies 1 FTE, or one full time resource. Full time is all working hours based on the Calendar settings. 0.5 would signify a part time resource who is available 1/2 time. This affects the resource's capacity.
   - **Business Unit**: Select a business unit from the dropdown. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
   - **Role**: Select a primary role from the dropdown. Available role choices are configured on the Fields page, in the section for resource-level fields.
   - **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
   - **Rate**: Enter the rate for this generic resource, if different than the rate associated to this generic resource's role (configured on Cost Categories page, see How do I manage Cost Categories?) . Rate is the amount that you bill out for the resource.
   - **Manager, Timesheet Administrator, Timesheet Manager, Governance Warnings, Governance Problems, Compliance**: These fields are not applicable for generic resources. Skip.
4. Click **Save**. The new generic resource will be available throughout OnePlan.



Create and Manage Teams in the Resource Center

This article explains how to create and manage teams of resources from the OnePlan Resource Center.

You can create teams of resources to represent departments, divisions, groups, scrum teams, etc.

Teams is a powerful feature in OnePlan that allows you to manage groups of resources easily. In OnePlan, you can easily assign entire teams of resources to tasks in your work plan, and use teams for resource planning rather than individual resources.

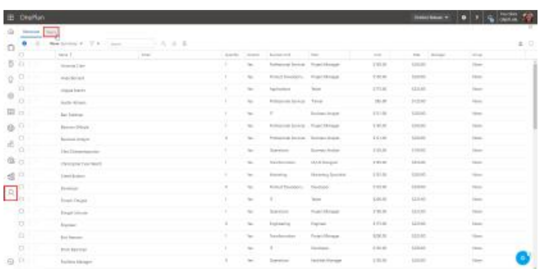
NOTE

Only users with 'Manage Resources' permissions can view the **Teams** tab in the **Resource Center**. The tab will be hidden from all other users.

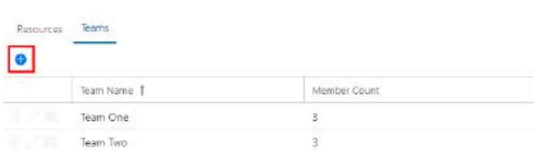
Create a New Team

To create a new team of resources:

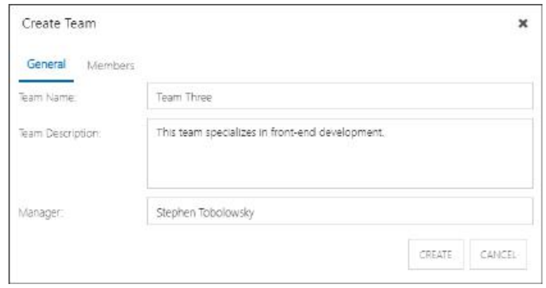
1. Go to the **Resource Center**.
2. Click on the **Teams** tab. Here you will see a list of all your existing teams (if available).



3. Click on the **Add Team** icon. The **Create Team** form will open.



4. Complete the **General** tab of the **Create Team** form. This is where you will enter general information about the team, including the team **Name**, a **Description** for the team, and, if desired, you can select the team's **Manager**.



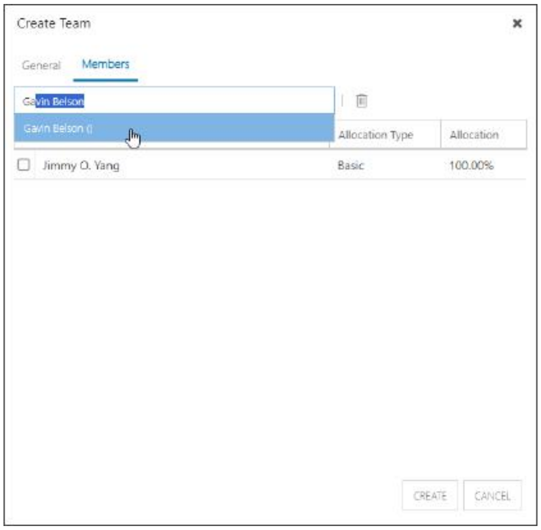
IMPORTANT

Team Managers work just like regular Managers in OnePlan. If you assign the team to tasks, that team's manager will get the allocation information. If you just assign an individual resource, that resource's manager will get the allocation information.

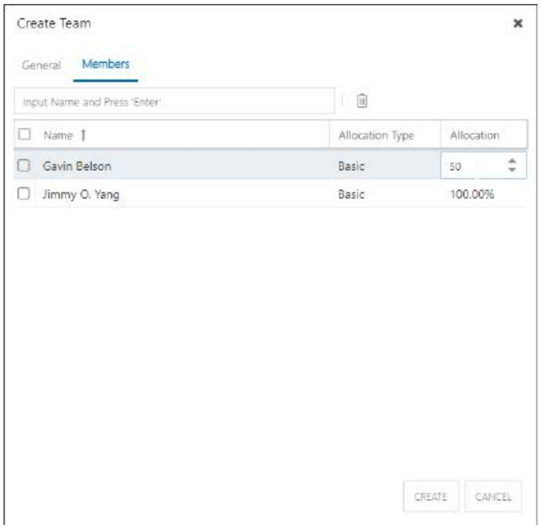
5. Click on the **Members** tab. Here you can search for and add resources to your team. To add a resource to the team, click into the search field and begin to type the resource's name. After you enter a couple of letters into the search field, resources will appear in search results. Select the desired resource, and they will be added to the team.

NOTE

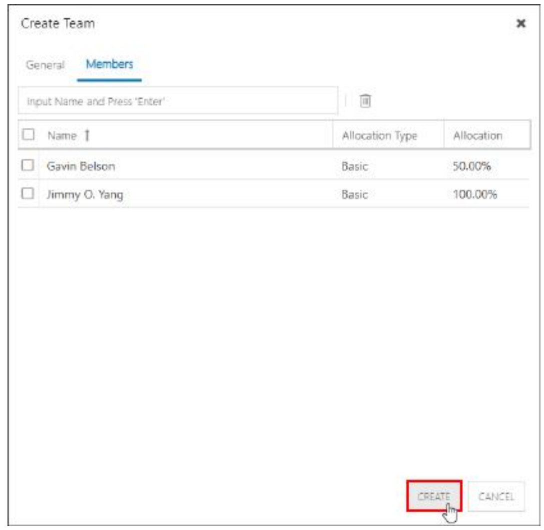
The resources need to be active resources in the Resource Center to be added to a team.

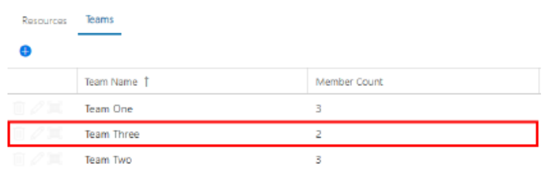


6. *(Optional)* Update the resource's allocation to the team. You can set how much of a resource's time is going to be allocated to this particular team. In this example, you can see that Gavin Belson has been allocated 50% to Team Three. To update a resource's allocation, click into the **Allocation** field for the desired resource, then enter the allocation % into the field.



7. Click **Create** to create your team. The team will now be available for use across OnePlan.





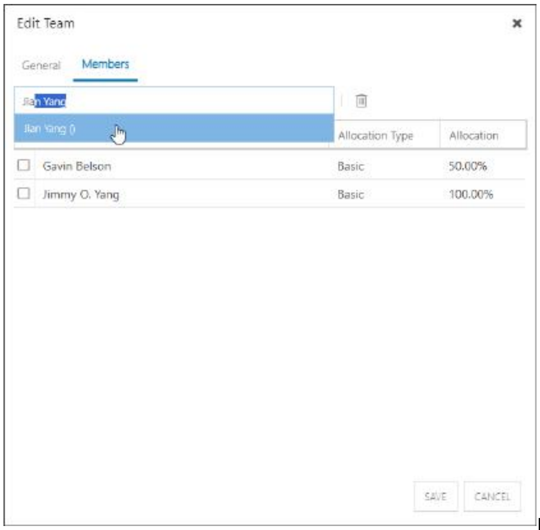
Edit a Team

After you create your teams of resources, you will likely need to add or remove members, update the team names, etc. To edit a team:

1. Click the **Edit** icon next to the desired team. The **Edit Team** form will open.

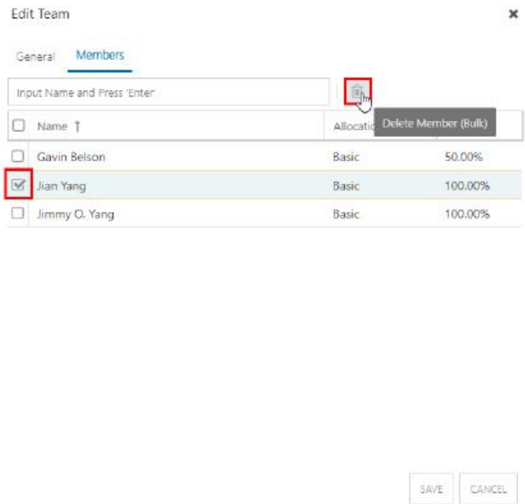
2. In the **General** tab of the **Edit Team** form, you can update the team **Name**, **Description**, or **Manager**.
3. Click the **Members** tab. Here you can add or remove resources from the team.
   a. To add a new resource to the team, click into the search field and begin to type the resource's name. After you enter a couple of letters into the search field, resources will appear in search results. Select the

desired resource, and they will be added to the team.

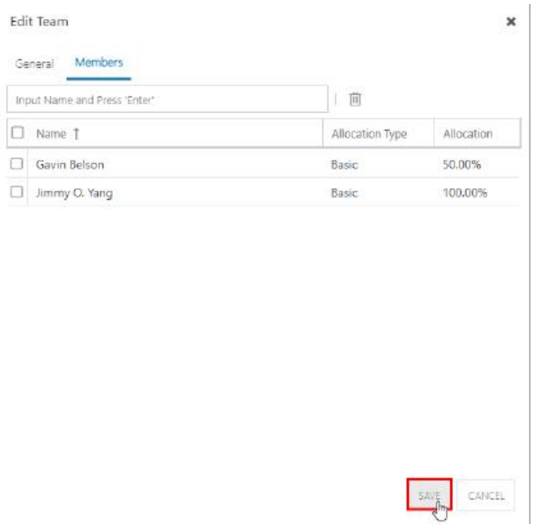


b. To remove a resource from the team, check the check box next to the desired resource(s). Then click the **Delete** icon at the top of the form.

> **NOTE**
> You can bulk remove resources from a team by selecting multiple resources and clicking **Delete**.



4. Once all of your updates are complete, click **Save**.



Delete a Team

To delete a team, click the **Delete** icon next to the desired team. The team will be removed from the Resource Center.

Add Users to OnePlan

This article explains how to add users/resources to your OnePlan environment.

Create Named Resources

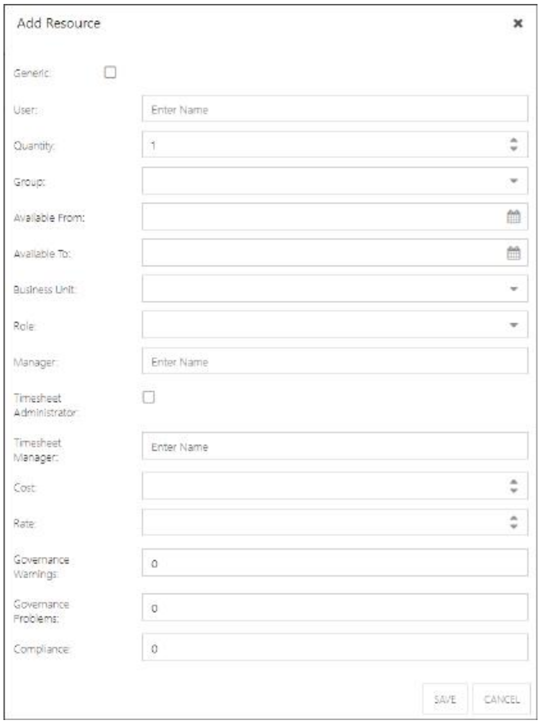
With Office365 Strict Authentication

If you are adding a new user who is part of your Entra/Office 365 tenant, and your organization has Office365 Authentication enabled, follow these instructions.

1. Go to the **Resource Center**.
2. Click **Add Resource**. The **Add Resource** form will open.
3. Complete the **Add Resource** form.
   - **Generic**: Leave the check box unchecked if the resource is a named user.
   - **User**: Begin typing the name of the user. The available names will authenticate based on user accounts in your Azure/Office365 tenant. Select the user name.
   - **Quantity**: 1 signifies 1 FTE, or one full-time resource. Full-time is all working hours based on the Calendar settings. 0.5 would signify a part-time resource who is available 1/2 time. This affects the resource's capacity.
   - **Group**: Select the appropriate Enterprise Security Group for this new user. Out of the box, OnePlan comes with the following Enterprise Security Groups, with the following permissions:
     - **None**: Does not have access to OnePlan
     - **Team Member**: Can view and edit plans or tasks assigned to them
     - **Contributor**: Can create, view, and edit their own plans
     - **Executive**: Can view all plans (and content for those plans)
     - **Manager**: Can view and edit all plans (and content for those plans)
     - **Owner**: Can view and edit all plans (and content for those plans); can modify OnePlan configuration (Admin)
   - **Business Unit**: Select the business unit. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
   - **Role**: Select primary role. Available role choices are configured on the Fields page, in the section for resource-level fields.
   - **Manager**: Begin typing the name of the manager for this user. Select the desired name.
   - **Timesheet Administrator**: (This field only shows when the Timesheet App has been added). Select this check box if this user is a timesheet administrator.
   - **Timesheet Manager**: (This field only shows when the Timesheet App has been added). Begin typing the name of the timesheet manager for this user. Select the desired name.
   - **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
   - **Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page). Rate is the amount that you bill out for the resource.
   - **Governance Warnings, Governance Problems, Compliance**: These fields are not editable. They are related to Insights, and display the number of governance warnings and problems and a calculated compliance score. Skip.
4. Click **Save**. The new user will be available throughout OnePlan. The user will also receive an invitation email from OnePlan informing them that they have been added to the OnePlan group, as well as a link to the group. The user can then use their Office 365 credentials to access OnePlan.

NOTE

Any additional fields that are configured as resource-level fields on the Fields page will show on the Add/Edit Resource forms.

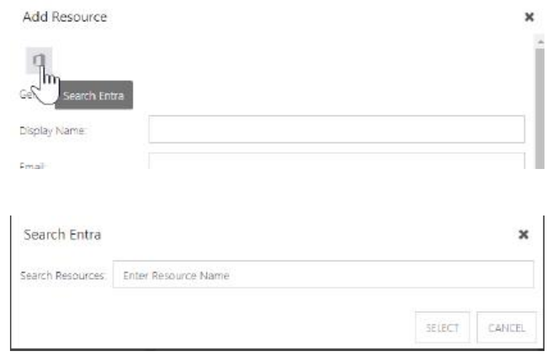


With Multi-Authentication Enabled and the User is part of your Entra/Office 365 Tenant

> **NOTE**
> Multi-Authentication must be enabled in order to add users with this method. See Enable OnePlan Multi-Authentication for instructions.

If you are adding a new user who is part of your Entra/Office 365 tenant, and your organization has Multi-Authentication enabled, follow these instructions.

1. Go to the **Resource Center**.
2. Click **Add Resource**. The **Add Resource** form will open.
3. Complete the **Add Resource** form.
   - Click the **Entra** icon. Search for and select the user you would like to add to OnePlan.



- **Generic**: Leave the check box unchecked if the resource is a named user.
- **Quantity**: 1 signifies 1 FTE, or one full-time resource. Full-time is all working hours based on the Calendar settings. 0.5 would signify a part-time resource who is available 1/2 time. This affects the resource's capacity.
- **Group**: Select the appropriate Enterprise Security Group for this new user. Out of the box, OnePlan comes with the following Enterprise Security Groups, with the following permissions:
  - **None**: Does not have access to OnePlan
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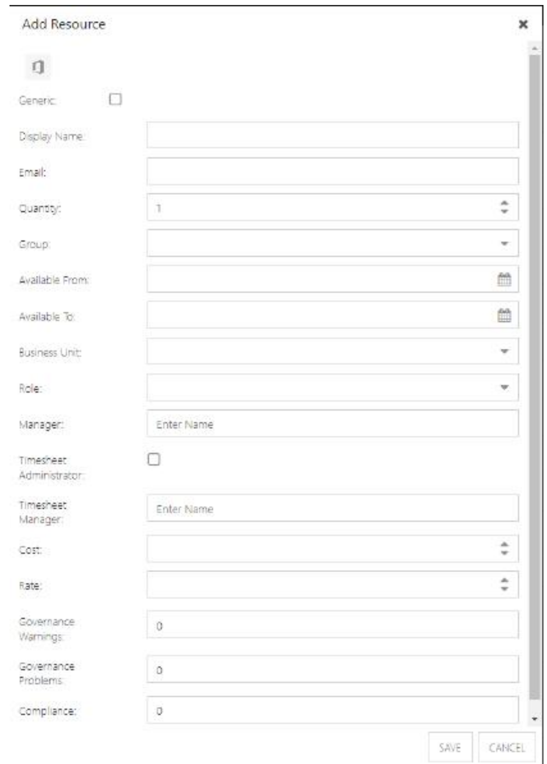
  - **Owner**: Can view and edit all plans (and content for those plans); can modify OnePlan configuration (Admin)
- **Business Unit**: Select the business unit. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
- **Role**: Select primary role. Available role choices are configured on the Fields page, in the section for resource-level fields.
- **Manager**: Begin typing the name of the manager for this user. Select the desired name.
- **Timesheet Administrator**: (This field only shows when the Timesheet App has been added). Select this check box if this user is a timesheet administrator.

- **Timesheet Manager**: (This field only shows when the Timesheet App has been added). Begin typing the name of the timesheet manager for this user. Select the desired name.
- **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
- **Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page). Rate is the amount that you bill out for the resource.
- **Governance Warnings, Governance Problems, Compliance**: These fields are not editable. They are related to Insights, and display the number of governance warnings and problems and a calculated compliance score. Skip.

4. Click **Save**. The new user will be available throughout OnePlan. The user will also receive an invitation email from OnePlan informing them that they have been added to the OnePlan group, as well as a link to the group. The user can then use their Office 365 credentials to access OnePlan.

> **NOTE**
> Any additional fields that are configured as resource-level fields on the Fields page will show on the **Add/Edit Resource** forms.



With Multi-Authentication Enabled and the User is an External Resource (Using an External Email)

> **NOTE**
> Multi-Authentication must be enabled in order to add users with this method. See Enable OnePlan Multi-Authentication for instructions.

If you are adding a new user who is NOT part of your Entra/Office 365 tenant, follow these instructions.

1. Go to the Resource Center.
2. Click Add Resource. The Add Resource form will open.
3. Complete the Add Resource form.
   - **Generic**: Leave the check box unchecked if the resource is a named user.

- **Display Name**: Enter a display name for the user. This will be the name shown in the top right corner of OnePlan, as well as in Resource Plans, Work Plans, etc.
- **Email**: Enter the email address for the new user. This will be the email address where this user will receive news and notifications from OnePlan.
- **Quantity**: 1 signifies 1 FTE, or one full-time resource. Full-time is all working hours based on the Calendar settings. 0.5 would signify a part-time resource who is available 1/2 time. This affects the resource's capacity.
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- **Role**: Select primary role. Available role choices are configured on the Fields page, in the section for resource-level fields.
- **Manager**: Begin typing the name of the manager for this user. Select the desired name.
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- **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
- **Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page). Rate is the amount that you bill out for the resource.
- **Governance Warnings, Governance Problems, Compliance**: These fields are not editable. They are related to Insights, and display the number of governance warnings and problems and a calculated compliance score. Skip.

4. Click **Save**. The new user will be sent a link in their email to finish setting up their OnePlan account. See Create a OnePlan Account for instructions.

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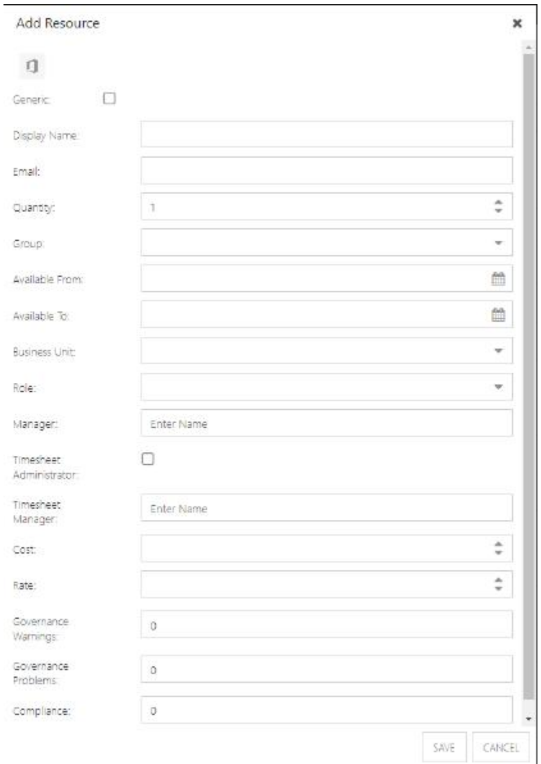

Create Generic Resources

1. Go to the **Resource Center**.
2. Click **Add Resource**. The **Add Resource** form will open.
3. Complete the **Add Resource** form.
   - **Generic**: Select the check box if the resource is generic.
   - **Display Name**: Enter the generic resource name. Typically, this is something like a role name or something similar.
   - **Quantity**: 1 signifies 1 FTE, or one full time resource. Full time is all working hours based on the Calendar settings. 0.5 would signify a part time resource who is available 1/2 time. This affects the resource's capacity.
   - **Business Unit**: Select a business unit from the dropdown. Available business unit choices are configured on the Fields page, in the section for resource-level fields.
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   - **Cost**: Enter the cost for this user. Cost is what us costs to have the resource on a project.
   - **Rate**: Enter the rate for this generic resource, if different than the rate associated to this generic resource's role (configured on Cost Categories page, see How do I manage Cost Categories?) . Rate is the amount that you bill out for the resource.
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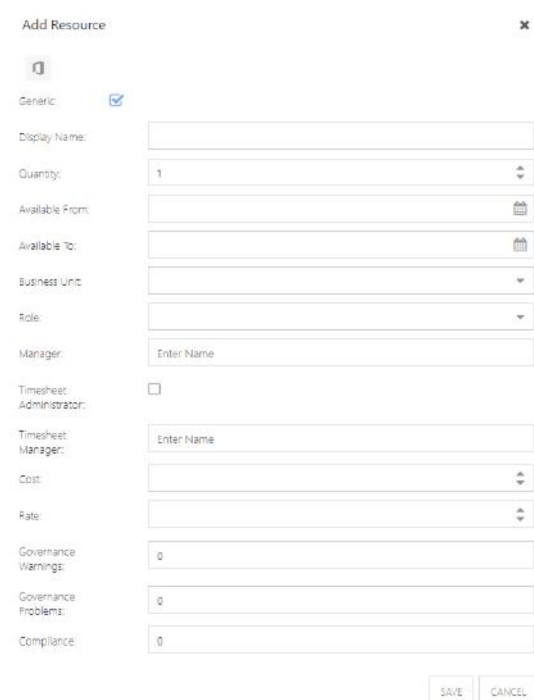
4. Click **Save**. The new generic resource will be available throughout OnePlan.



Manage Resource Notification Settings

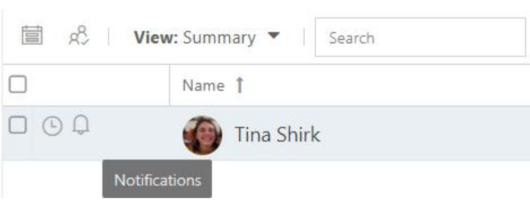
This article explains how to update user system notification settings.

Users can opt in or out of system notifications. Managers and/or Owners can also change notification settings for their resources.

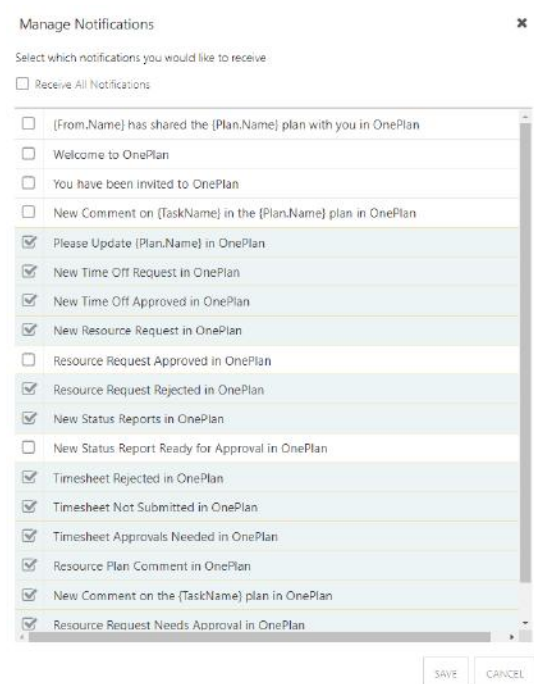
> **NOTE**
> System notifications will not be sent to users marked as inactive.

> **NOTE**
> If you disable a notification, users will not receive the email or the in-system notification.

1. Go to the **Resource Center**. Click the bell icon next to the desired resource. The **Manage Notifications** form will open.



2. By default, all notifications are enabled. To opt out of selected notifications, uncheck the Recieve All Notifications box. Then you can unslelect/select individual notifications from the list.



3. Click **Save** to save your updates.

Create and Manage Teams in the Resource Center

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You can create teams of resources to represent departments, divisions, groups, scrum teams, etc.

Teams is a powerful feature in OnePlan that allows you to manage groups of resources easily. In OnePlan, you can easily assign entire teams of resources to tasks in your work plan, and use teams for resource planning rather than individual resources.

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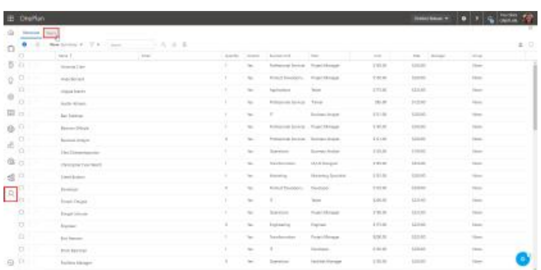
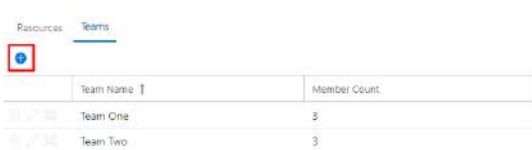
Create a New Team

To create a new team of resources:

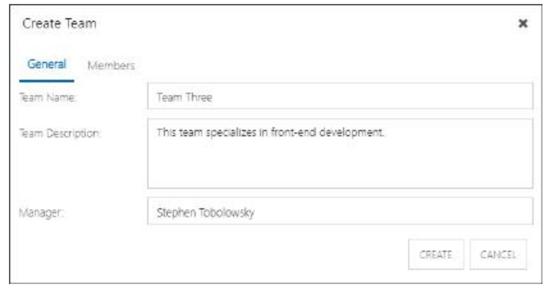
1. Go to the **Resource Center**.
2. Click on the **Teams** tab. Here you will see a list of all your existing teams (if available).



3. Click on the **Add Team** icon. The **Create Team** form will open.



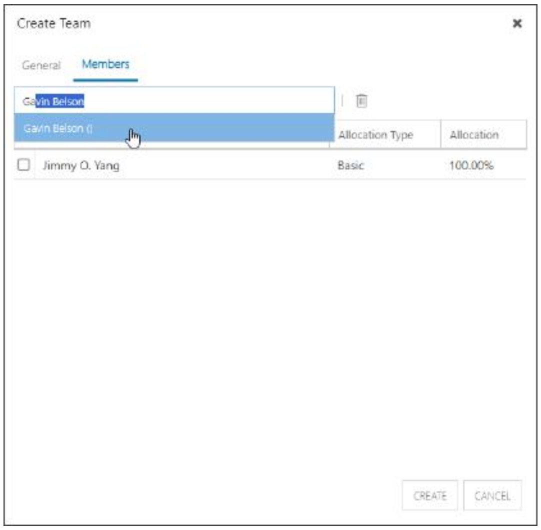
4. Complete the **General** tab of the **Create Team** form. This is where you will enter general information about the team, including the team **Name**, a **Description** for the team, and, if desired, you can select the team's **Manager**.



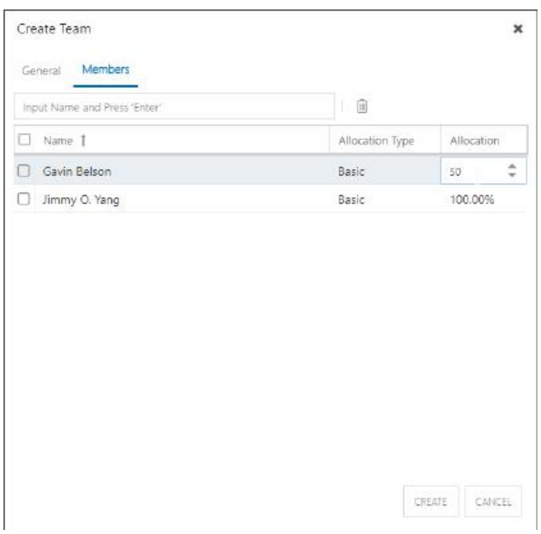
> **IMPORTANT**
> Team Managers work just like regular Managers in OnePlan. If you assign the team to tasks, that team's manager will get the allocation information. If you just assign an individual resource, that resource's manager will get the allocation information.

5. Click on the **Members** tab. Here you can search for and add resources to your team. To add a resource to the team, click into the search field and begin to type the resource's name. After you enter a couple of letters into the search field, resources will appear in search results. Select the desired resource, and they will be added to the team.

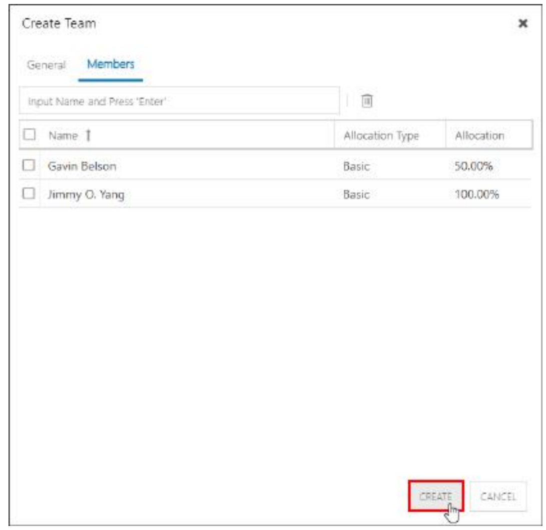
> **NOTE**
> The resources need to be active resources in the Resource Center to be added to a team.

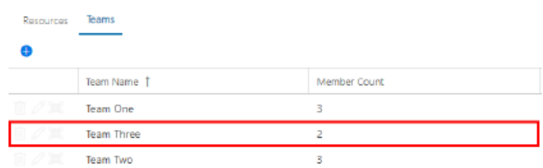


6. *(Optional)* Update the resource's allocation to the team. You can set how much of a resource's time is going to be allocated to this particular team. In this example, you can see that Gavin Belson has been allocated 50% to Team Three. To update a resource's allocation, click into the **Allocation** field for the desired resource, then enter the allocation % into the field.



7. Click **Create** to create your team. The team will now be available for use across OnePlan.





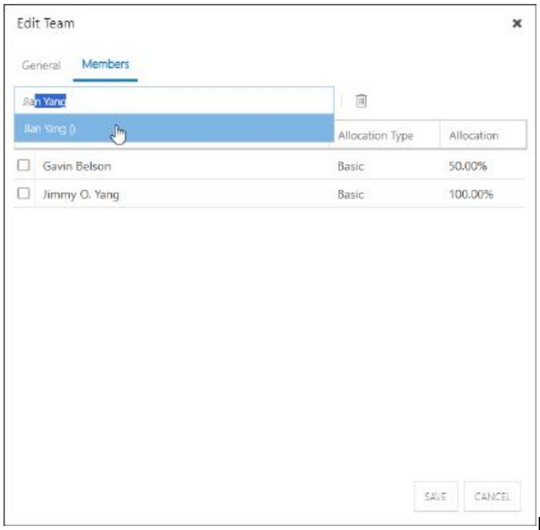
Edit a Team

After you create your teams of resources, you will likely need to add or remove members, update the team names, etc. To edit a team:

1. Click the **Edit** icon next to the desired team. The **Edit Team** form will open.

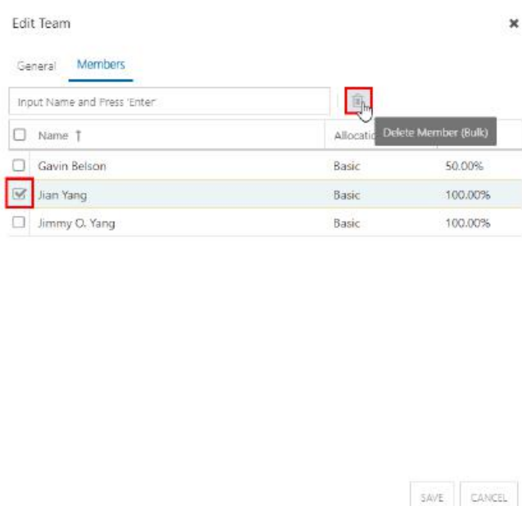
2. In the **General** tab of the **Edit Team** form, you can update the team **Name**, **Description**, or **Manager**.
3. Click the **Members** tab. Here you can add or remove resources from the team.
   a. To add a new resource to the team, click into the search field and begin to type the resource's name. After you enter a couple of letters into the search field, resources will appear in search results. Select the

desired resource, and they will be added to the team.

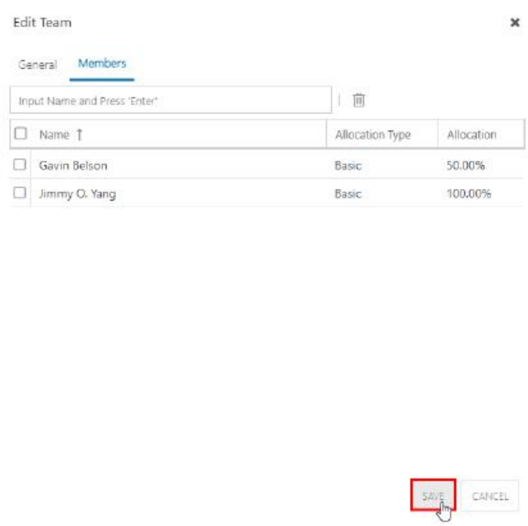


b. To remove a resource from the team, check the check box next to the desired resource(s). Then click the **Delete** icon at the top of the form.

> **NOTE**
> You can bulk remove resources from a team by selecting multiple resources and clicking **Delete**.



4. Once all of your updates are complete, click **Save**.



Delete a Team

To delete a team, click the **Delete** icon next to the desired team. The team will be removed from the Resource Center.

Allocate Resources to Teams (Total Percentage and Time-Phased Allocation)

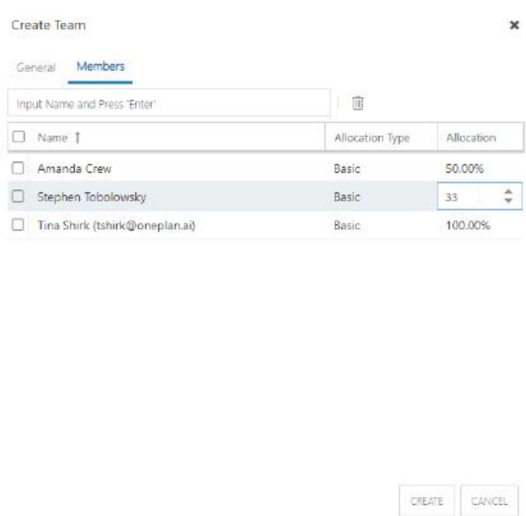
This article explains how resource allocation works for resource teams.

When creating a team of resources, you can specify which resources are part of each team, and choose what percent they will be allocated to that team. Additionally, you can break down resource allocation to a team in a time-phased manner.

Set a Resource's Total Allocation to a Team

To specify the percentage of resource's capacity allocated to a team:

1. Once you add a resource to a team (see Create and Manage Teams in the Resource Center), click into the **Allocation** field for the desired resource, then enter the allocation % into the field.
   In this example, 50% of Amanda Crew's capacity, 33% of Steven Tobolowsky's capacity, and 100% of Tina Shirk's capacity are allocated to the team. This means that these resources will ALWAYS be allocated the specified percentage to the team, as long as this team exists.



2. Click **Create** or **Save** to save the allocation updates to the team.

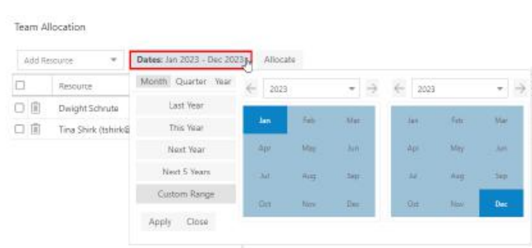
Time-Phased Allocation of a Resource to a Team

If you would like the resource allocations to a given team to last for a specified period, you can break down resource allocations to a team using the time-phased allocation feature.

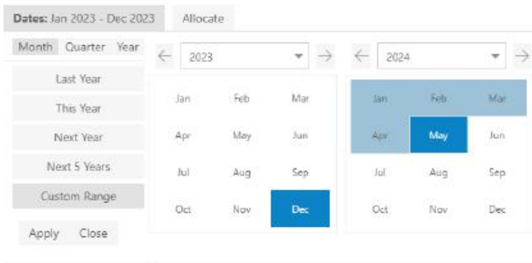
1. Create and save your team (see Create and Manage Teams in the Resource Center for instructions). Once you click **Create**, you will return to the Teams list.
2. Back on the Teams list, click the **Time-phased Allocations** icon next to the team name. The **Team Allocation** form will open.
3. From the **Add Resource** drop-down, select the resource you would like to add time-phased allocations for. The selected resource will be added to the allocations list below. Repeat until all of the desired resources are added to the allocations list.

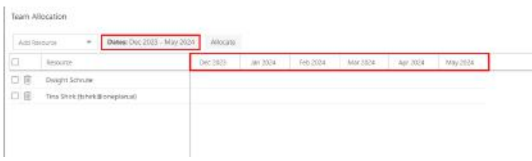
> **NOTE**
> You can add as many resources from your team as you wish and create time-phased allocations for all of them.

4. Click on the **Dates** menu and select the date range you would like the time-phased allocations to fall within. You can set the allocations on a monthly (**Month**), quarterly (**Quarter**), or yearly (**Year**) basis. Then you can select from a preset date range including **Last Year**, **This Year**, **Next Year**, or **Next 5 Years**. Or, you can create a **Custom Range**. Once the date range is set, click **Apply**, and the allocation list view will update to match your date settings.

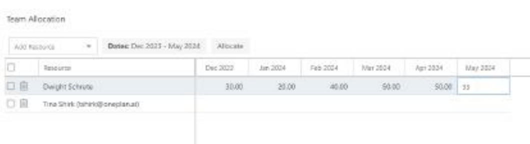


In this example, I am going to allocate monthly and set a custom date range for December 2023 through May 2024.

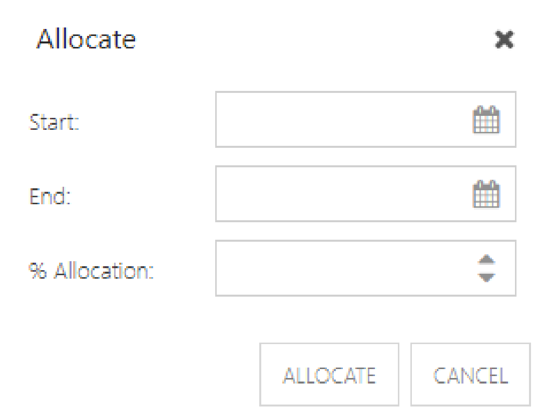




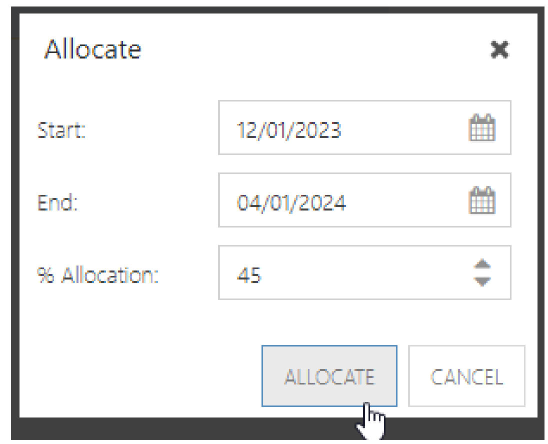
5. Now enter the allocation percentages for the resources. There are two ways to do this:
    1. Click into the cells for the resource and manually enter the allocation percentages. This method is useful if the resource will be allocated differently month-to-month (or quarter-to-quarter, or year-to-year)
       In this example, Dwight has been allocated to the team 30% in December, 20% in January, 40% in February, 50% in March, 50% in April, and 33% in May.



    2. Check the checkbox next to the desired resource, then click the **Allocate** button, and the **Allocate** form will open. The **Allocate** form allows you to select a start and end date, and a % Allocation. The allocation % set will apply equally to each month/quarter/year between the start and end dates.



In this example, Tina has been allocated to the team 45% for December 2023 through April 2024.

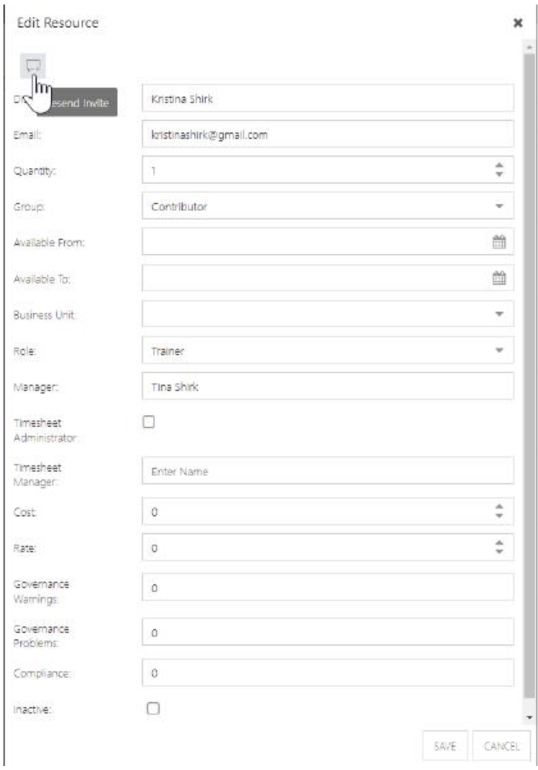


Resend a OnePlan Invite

This article explains how to resend a OnePlan invite email. If a user has been invited to OnePlan but has not yet accepted, you can use the resend button in the resource edit screen. This button allows the user to resend the invitation, streamlining the process and ensuring that invitations can be easily reissued when needed.

1. Go to the **Resource Center**.
2. Locate the user you would like to resent the OnePlan invite to. Click the **Edit** icon next to their name. The **Edit Resource** form will open.

3. At the top of the **Edit Resource** form, click the **Resend Invite** icon. The OnePlan invite email for your OnePlan Group will resend to the user.



Audit

Audit Overview

This article provides an overview of the Audit feature.

The Audit feature allows you to keep track of important usage data on a Plan level, and for individual resources.

Plan level auditing captures information such as:

- Work item creation, updates, and deletions
- Adding, updating, or removing users from a plans shared with
- Archiving a plan

See Audit a Plan [261] for more information on Plan level auditing.

Resource level auditing captures information such as:

- User logins
- Editing users
- Adding new users

See Audit Resources [263] for more information on Resource level auditing.

You Also Need to Know

- The Audit feature is available for Enterprise customers. Please contact OnePlan sales for more information.
- Please contact OnePlan to enable the Audit feature. Once enabled, users with "Owner" permissions can configure what is being audited in the Audit Settings.

Audit Triggers

This article describes the actions that will trigger audit log entries.

The Audit feature allows you to keep track of important usage data on a Plan level, and for individual resources.

The following actions when working in a plan will trigger an audit log entry:

- Creating a work item
- Updating a work item
- Deleting a work item
- Updating a work item using the REST API
- Converting a work item into a milestone using the **Convert to Milestone** function
- Updating work items using the Gantt
- Adding a user to a plan Shared With list
- Updating a user in a plan Shared With list
- Removing a user from a plan Shared With list
- Archiving a plan
- Adding a predecessor to a work item
- Updating a work items calendar
- Updating a work item's mode
- Converting a work item to a milestone
- Marking a work item as inactive
- Changing a work item to be manually scheduled
- Copying and pasting work items

The following actions when working with resources will trigger an audit log entry:

- User logins
- Editing users
- Adding new users
- Changing a generic resources name
- Using the import option in the resource planner

Audit a Plan

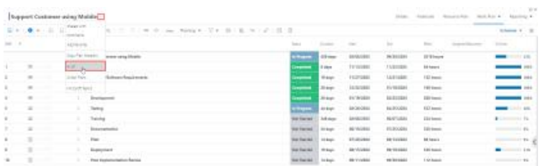
This article explains OnePlan's Plan Auditing feature.

> **NOTE**
> The Audit feature is available for Enterprise customers. Please contact OnePlan sales for more information.

The Plan Auditing feature allows you to capture user interaction with plans including when a user adds, updates, or deletes work items, who a user shares a plan with, and much more. Plan auditing captures information from the Plan Details, the Resource Plan, the Financial Plan, the Share With, and the Work Plan.

Access a Plan Audit Log

1. Go to a plan and open it.
2. Click the ellipsis (...) next to the plan name, and select **Audit** from the drop down. The **Audit** form will open.



3. To access the various audit logs from the selected plan, use the tabs at the top of the **Audit** form. Options include:
   - **Plan Details**. Here you can view audit information for any changes made to the plan's Plan Details form.
   - **Financials**. Here you can view audit information for any changes made to the plan's Financial Plan.
   - **Resource Plans**. Here you can view audit information for any changes made to the plan's Resource Plans.
   - **Share With**. Here you can view audit information for any changes made to the plan's Share With list (who the plan is shared with).
   - **Work Plan**. Here you can view audit information for any changes made to the plan's Work Plan.

Audit Filters

You can apply filters to audit specific plan information. The filters available are across the top of the Audit form. The filters available change based on the audit log tab you are in.

Plan Details filters

- **Action Taken**: Select the user actions you would like to review. Options include **Add** and **Update**.
- **Modified By**: Select a user from the drop down to view the data modified by that user.
- **Fields**: Select a plan field to view audit information for the selected field.
- **Date Range**: Select a date range to view audit data from the selected date(s).

Financials filters

- **Action Taken**: Select the user actions you would like to review. Options include **Add**, **Update**, and **Delete**.
- **Modified By**: Select a user from the drop down to view the data modified by that user.
- **Fields**: Select a financial plan field to view audit information for the selected field.
- **Entry Date**: Select an entry date or entry date range to view financial data entered on the selected date(s).
- **Date Range**: Select a date range to view audit data from the selected date(s).

Resource Plans filters

- **Action Taken**: Select the user actions you would like to review. Options include Add, Update, **Delete**, **Approve**, and **Reject**.
- **Modified By**: Select a user from the drop down to view the data modified by that user.
- **Resource**: Search for and select a resource to view audit information for the selected user.

- **Fields**: Select a resource plan field to view audit information for the selected field.
- **Entry Date**: Select an entry date or entry date range to view resource data entered on the selected date(s).
- **Date Range**: Select a date range to view audit data from the selected date(s).

Share With filters

- **Action Taken**: Select the user actions you would like to review. Options include **Add**, **Update**, and **Delete**.
- **Modified By**: Select a user from the drop down to view the data modified by that user.
- **Resource**: Select a resource from the drop down to view the audit information for the selected resource.
- **Date Range**: Select a date range to view audit data from the selected date(s).

Work Plan filters

- **Action Taken**: Select the user actions you would like to review. Options include **Add**, **Update**, and **Delete**.
- **Item**: Select a work item from the drop down to filter for that item's audit data.
- **Modified By**: Select a user from the drop down to view the data modified by that user.
- **Fields**: Select a work plan field to view audit information for the selected field.
- **Date Range**: Select a date range to view audit data from the selected date(s).

Export the Plan Audit Log

You can export the Plan Audit Log into an Excel spreadsheet.

Simply click the **Export** icon, select **Excel xlsx**, and an Excel file will download to your machine.

NOTE

When exporting the audit logs, audit log rows created by system jobs will show as modified by "System".

Audit Resources

This article explains OnePlan's Resource Auditing feature.

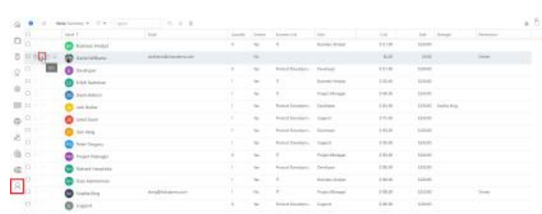
NOTE

The Audit feature is available for Enterprise customers. Please contact OnePlan sales for more information.

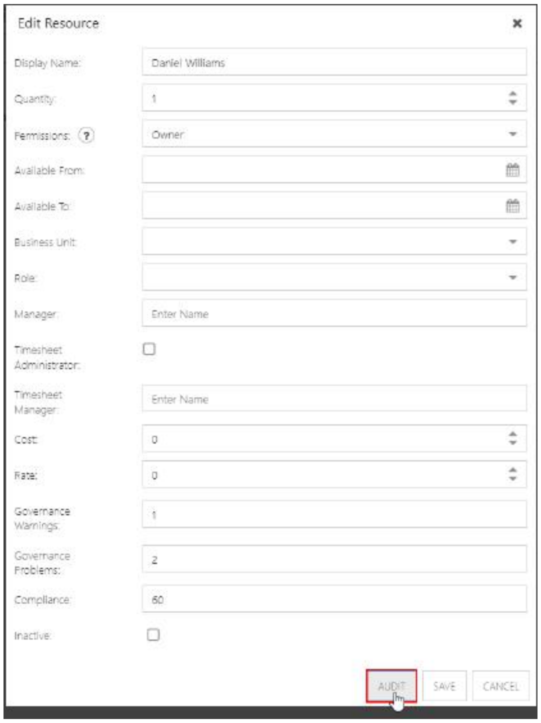
The Resource Auditing feature allows you to capture Resource information like logins, and much more.

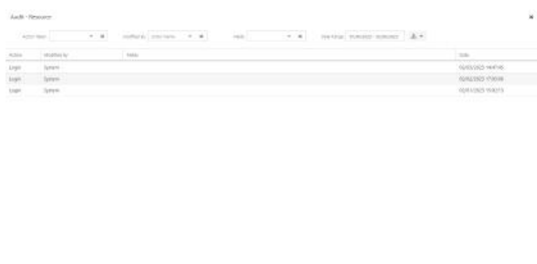
Access Resource Audit Logs

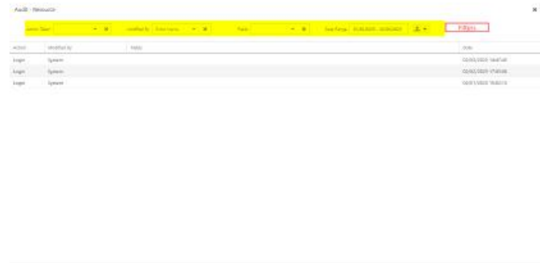
1. Go to the **Resource Center**.
2. Locate the desired resource, and click the **Edit** icon next to their name. The **Edit Resource** form will open.



3. Click the **Audit** button at the bottom of the **Edit Resource** form. The **Audit - Resource** log will open.







Export the Resource Audit Log

You can export the Resource Audit Log into an Excel spreadsheet.

Simply click the **Export** icon, select **Excel xlsx**, and an Excel file will download to your machine.

Audit Filters

You can apply filters to audit specific resource information. The filters available are across the top of the **Audit - Resources** form.

- **Action Taken**: Select the resource actions you would like to review. Options include **Add**, **Update**, and **Login**.
- **Modified By**: Select a user from the drop down to filter for the users audit data.
- **Fields**: Select a resource field to view audit information for the selected field.
- **Date Range**: Select a date range to view audit data from the selected date(s).

OnePlan in Other Apps

Install the OnePlan for Project Connector

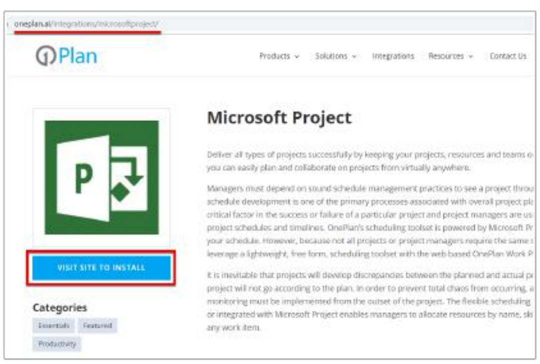
This article explains how to install the OnePlan for Project Connector between OnePlan and Microsoft Project. The OnePlan for Project Connector tools allows project managers to build and manage their project schedules in the MS Project Desktop, and then sync the project schedule to OnePlan.

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.

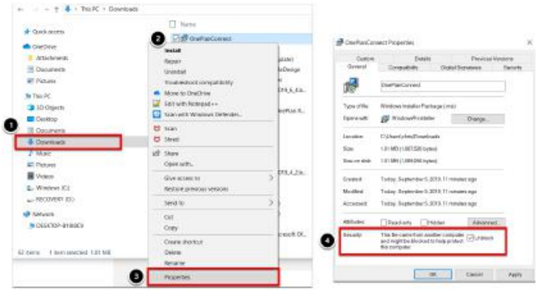


Save the Download File

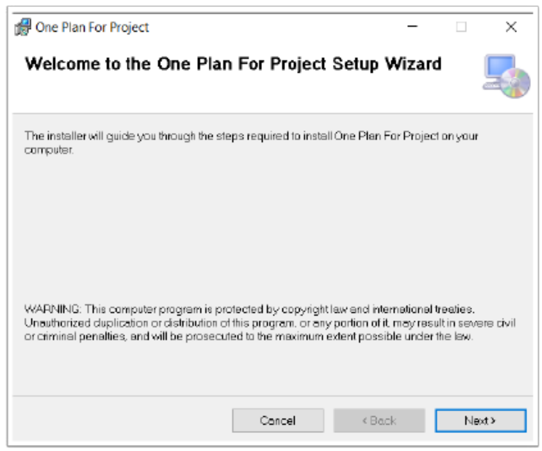
If prompted, click **Save**. Do not click Run. Instead, go to your Downloads folder (or wherever you may have saved it).

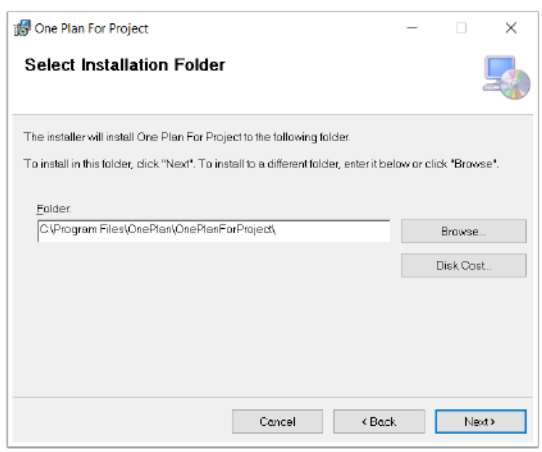
Unblock Download File

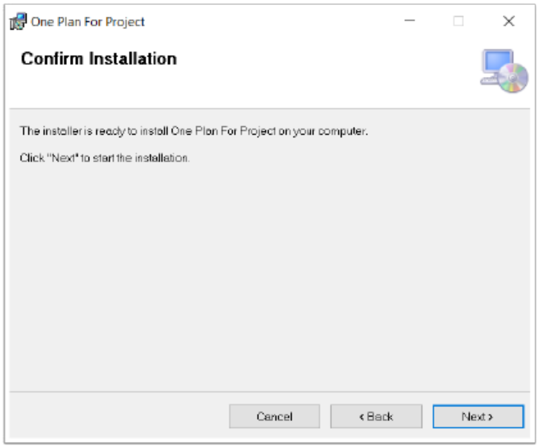
You may prompted that the download file is blocked. Open the properties for the download file. On the general tab, select the check box for **Unblock**.

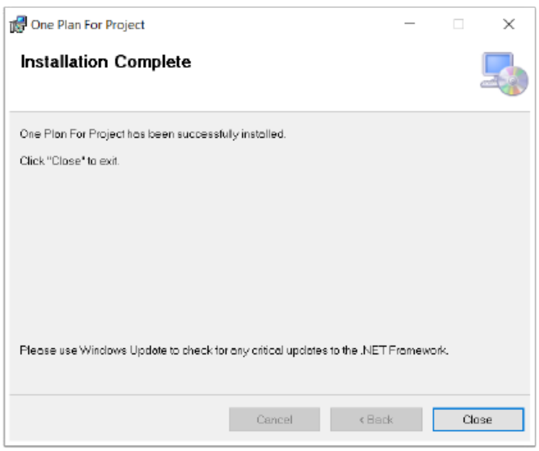


Run Installer Setup Wizard



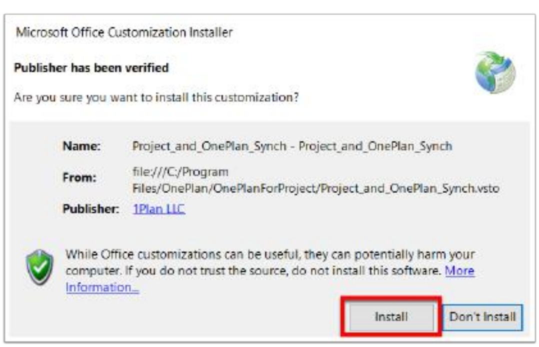






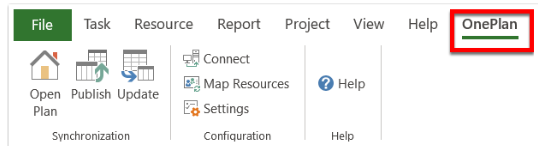
Open Microsoft Project

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.

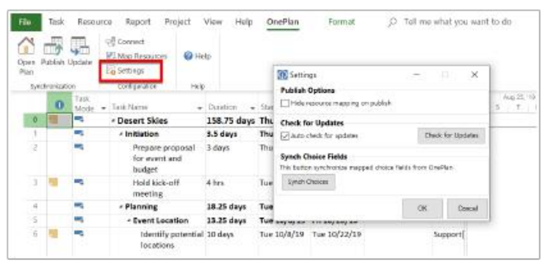


OnePlan Connector Settings

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.



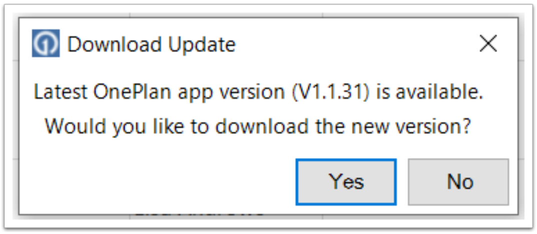
OnePlan Help

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 [267]

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

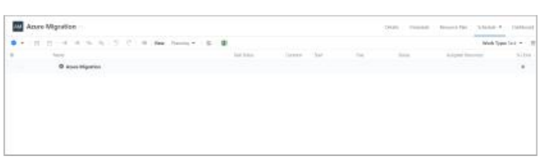
This article explains how to use the OnePlan for Project Connector between OnePlan and Microsoft Project. The OnePlan for Project Connector tools allows project managers to build and manage their project schedules in the MS Project Desktop, and then, sync the project schedule to their Plan in OnePlan.

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.

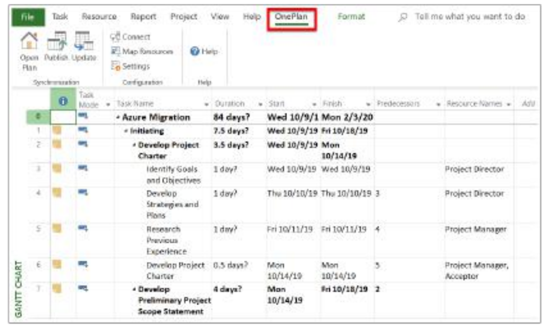
New Plan without a Schedule of Tasks

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.



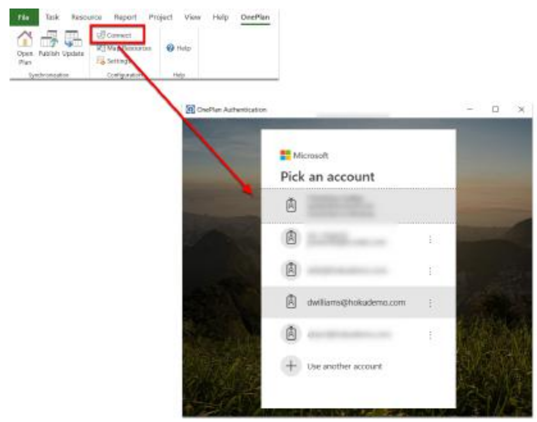
Open Microsoft Project

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



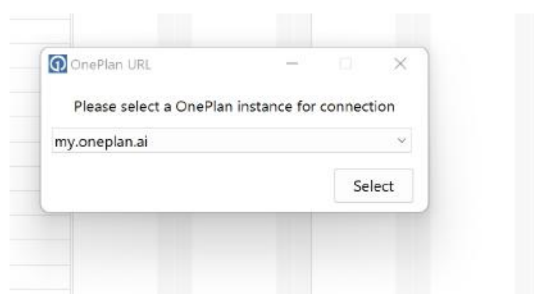
Connect to OnePlan Group and Plan

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

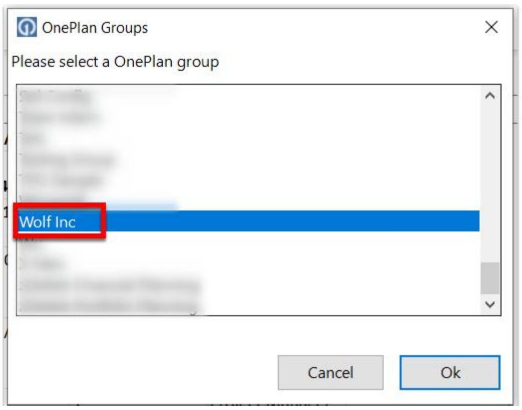


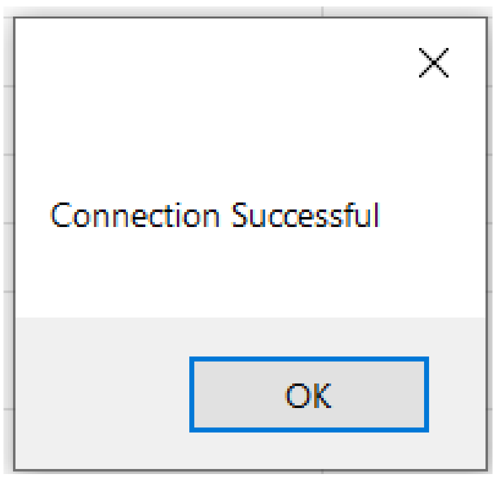
Select OnePlan Instance and Group

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



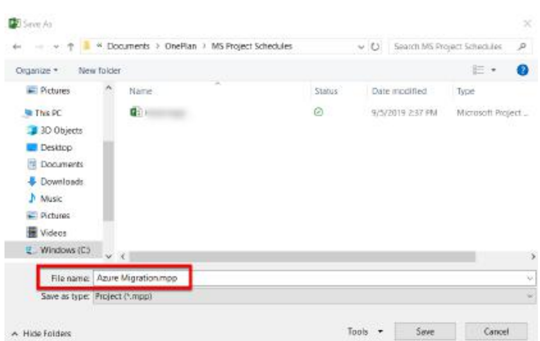
Then select your OnePlan group,





Save Plan

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



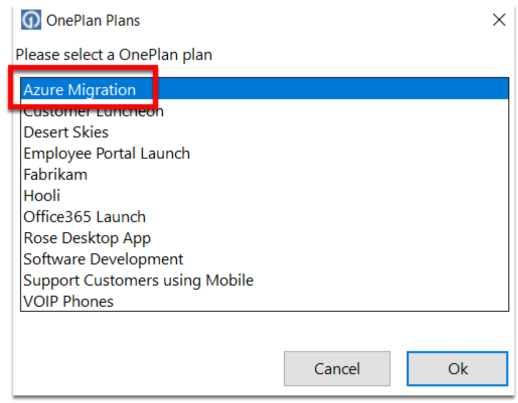
Publish Project Schedule to OnePlan

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.



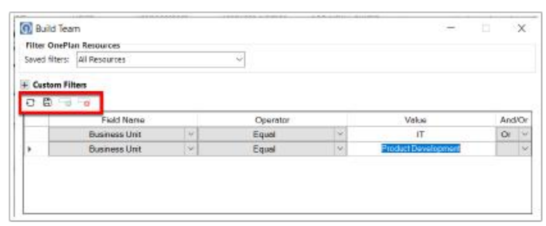
Map Resources / Build Team

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

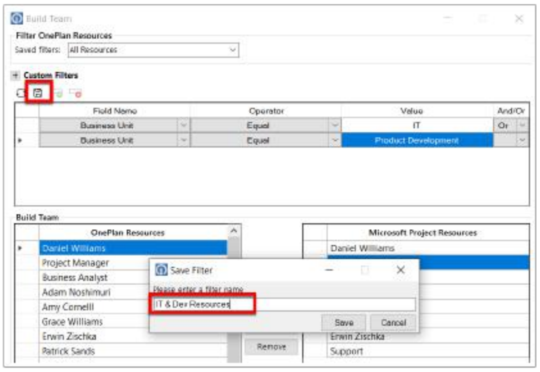
If you have a large Resource Center in OnePlan, you may add filters to limit which resources show for mapping. Select a resource-level field, such as department, role, etc. Select the operator, and enter the desired filter value. If adding additional rows, select And/Or for how the filters should work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



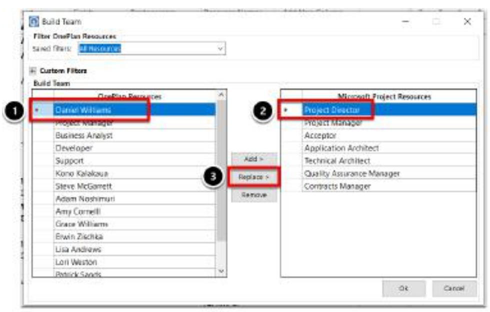
Save Filter

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.

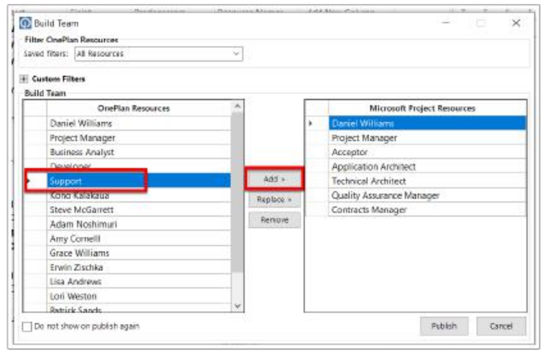


Map Resources

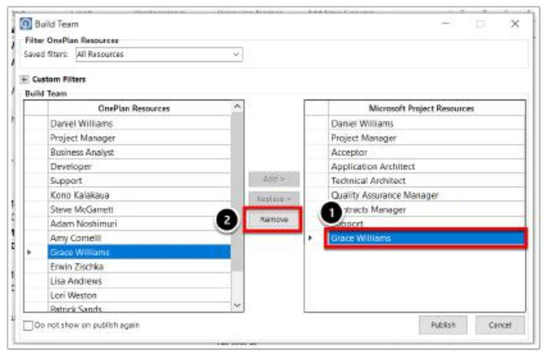
Select the name of a OnePlan resource on the left side. Select the name of a resource from your MS Project schedule on the right side. Click **Replace**. This will replace any references to that MS Project schedule resource with the name of the OnePlan resource.



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.

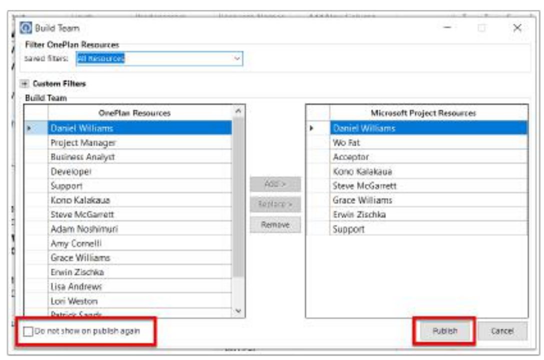


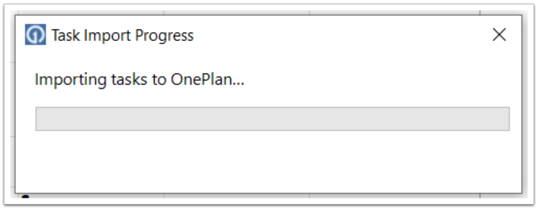
If a name is mapped that you want to change, select the row on the right side, then click the **Remove** button.



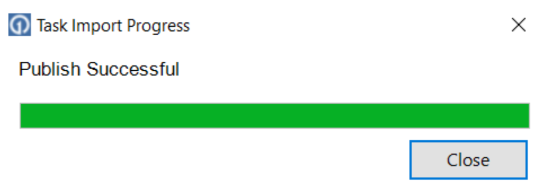
You may select the check box to not show on publish (you'll still be able to manually map resources via the ribbon button).

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





Publish Successful

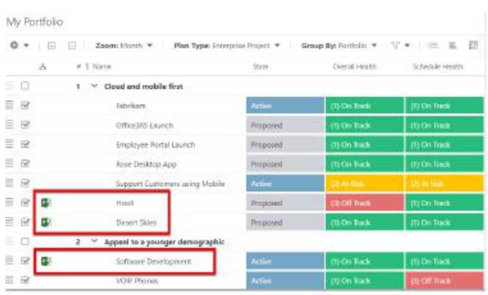


Open Plan in OnePlan

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

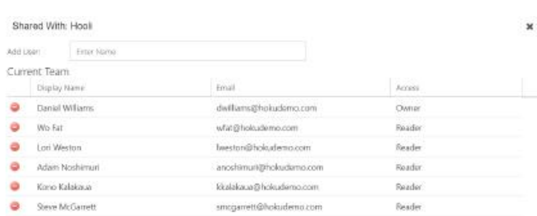
View Which Plans are Connected to MS Project

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



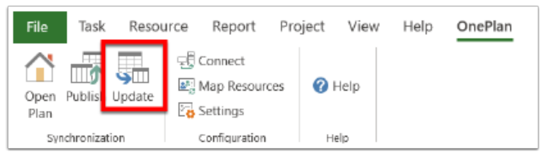
Updated Team

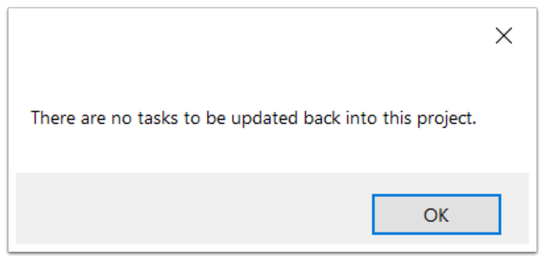
Any tasks assigned to resources in the MS Project schedule when mapped and published will be added to your plan team (Shared With).



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

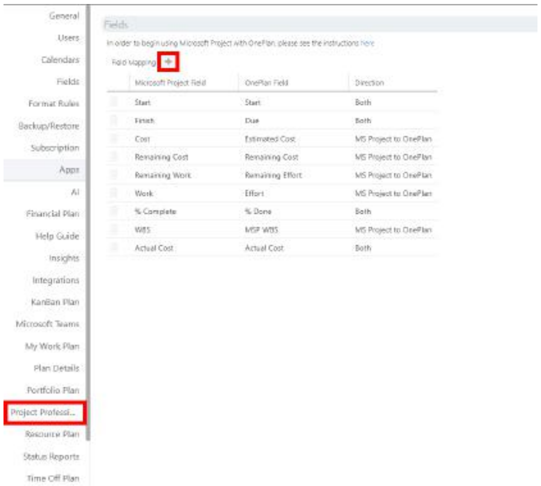
This article explains how to map OnePlan fields and Project fields using the OnePlan to Project Connector.

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.

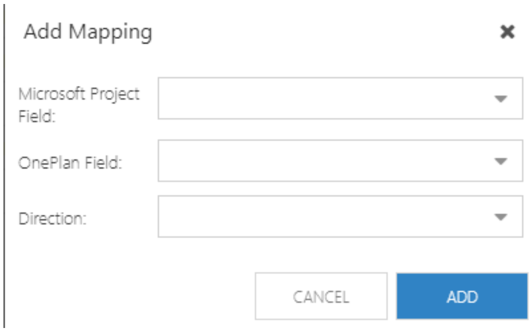
This procedure also requires the OnePlan for Project Connector to be installed and configured. See Install the OnePlan for Project Connector and Use the OnePlan for Project Connectorfor instructions.

Map Custom Fields in the OnePlan and Project Connector

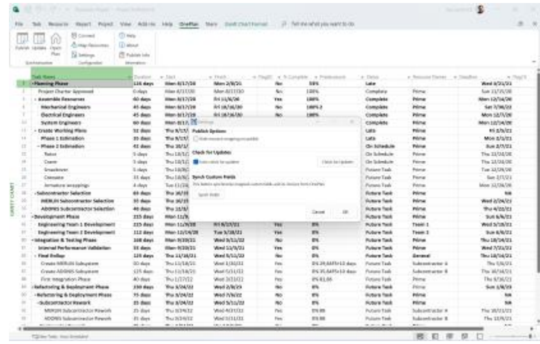
1. Go to the OnePlan admin pages > **Project Professional**.
2. Click **New Mapping**. The **New Mapping** form will open.



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.

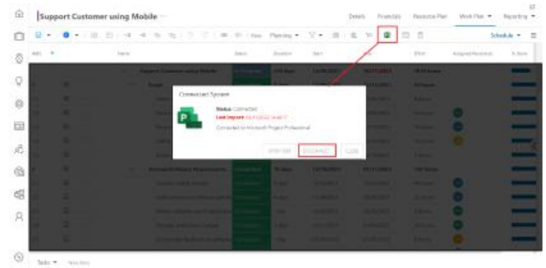


Import Microsoft Project Schedule into OnePlan

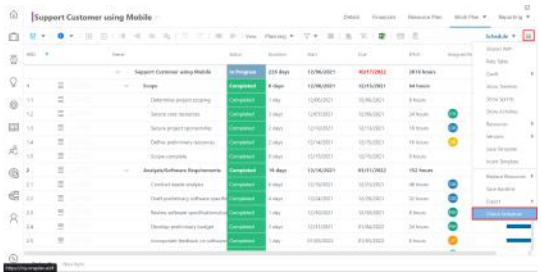
This article explains how to import your Microsoft Project schedules into OnePlan.

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 [265] to install Project Connect in Microsoft Project.
2. Follow Use the OnePlan for Project Connector [267] 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 does my Project schedule get stored in Teams?

This article explains how the feature works for storing your Project schedule file in a Teams document library rather than locally on your desktop.

This feature requires that your admin has configured both the Project Professional and Microsoft Teams apps in OnePlan.

Storing Microsoft Project Templates

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

How do I use OnePlan with Project for the Web (Video)

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

How do I manage OnePlan in Microsoft Teams?

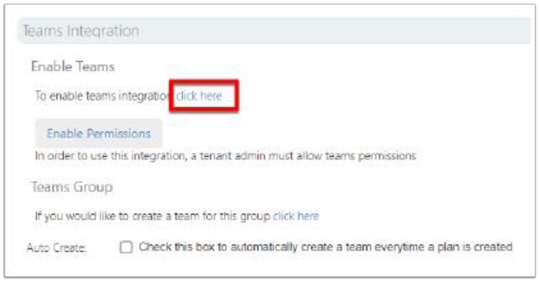
This article shows how to enable and use OnePlan within Microsoft Teams.

Go to the Admin pages, select Microsoft Teams in the navigation.

This requires the Microsoft Teams app be installed. To learn how to add/install apps, refer to the article: How do I add apps?

Enable Teams Integration

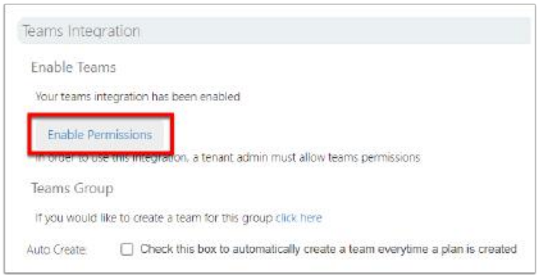
Click the link to enable the Teams integration with your OnePlan group.



Enable Permissions

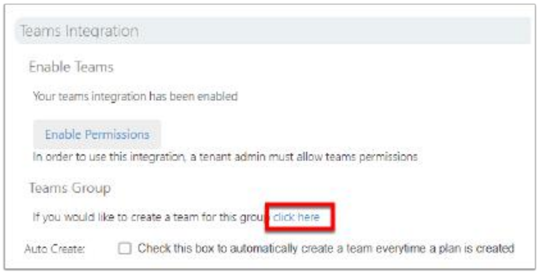
This step only needs to be done once per tenant. So, if you have multiple groups and the permissions were already enabled in another group, you can skip this step.

Refresh your browser (& navigate back to the Teams settings page again). Click the **Enable Permissions** button. This allows OnePlan to communicate with Microsoft Teams. Click **Accept**.



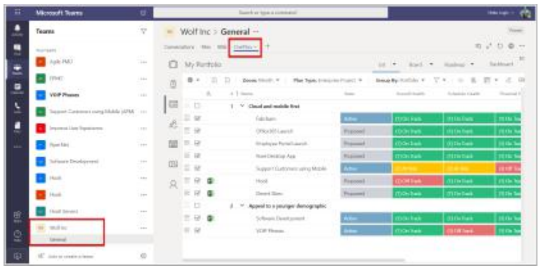
Create a Group Team

Click the link to create a new Team in Microsoft Teams for this OnePlan group. The Team is created and when you view the Team, a new tab for OnePlan is added.



Group Level Team Created

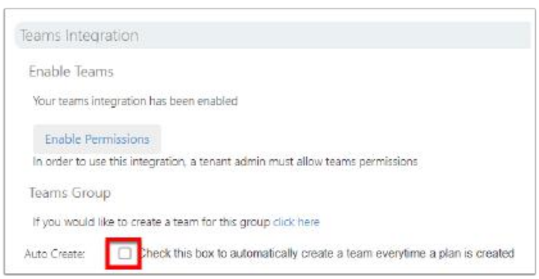
When the Group Level Team is created, a tab for OnePlan will show. All the functionality & modules of OnePlan are available within the Teams interface.



Set Auto Create Preference

Select the check box to have a new Team created for every new plan created in OnePlan. Note, this could be cumbersome if not every plan warrants a need for its own Team. This is not recommended, unless you are certain there should be a separate Team for every plan.

Instead, leave the box unchecked. Then, the plan owners can choose to create a new Team for their plans as needed on demand.



Manage a Backlog with Azure DevOps and OnePlan (Video)

In this video we demonstrate how to manage your Azure DevOps (ADO) backlog in OnePlan using the ADO and OnePlan integration.

//player.vimeo.com/video/725699436

End User Best Practices

Improve OnePlan Performance as an End User

This article describes methods you, as an end user, can use to help improve OnePlan performance.

Portfolio

- Use pre-filters. Ideally, your administrator has made pre-filters required for the portfolio area, so users must select a pre-filter in order for data to load. These pre-filters are server-side filters that significantly reduce the amount of data loaded in the Portfolio, thus increasing performance.
- Archive old plans. The archive function moves your plans and associated data into a separate database partition. Archiving old plans removes them from your portfolio, reducing the number of plans that OnePlan needs to load when you open your portfolio.

Modeler

- Use filters when setting up your models so you only pull in the plans you need. Limiting the amount of data that the model needs to load will reduce load times and improve performance.

Resource Plans

- Use pre-filters. Ideally, your administrator has made pre-filters required for the resource planner, so users must select a pre-filter in order for data to load. These pre-filters are server-side filters that significantly reduce the amount of data loaded in the resource planner, thus increasing performance.
- Limit the number of periods of data in your resource planner.

Financial Plan

- Stick to monthly planning unless you absolutely must plan weekly. In order to enable users to plan on a weekly basis, OnePlan actually stores data daily, which significantly increases the amount of data handled by the system, and, in turn, slows performance. Higher-level financial planning reduces the amount of data stored per cost category and helps improve performance.
- If your environment allows you to create custom cost categories or detail rows, refrain from adding too many additional cost categories or detail rows to the financial planner. The more custom cost categories and detail rows you add to the financial planner, the slower your OnePlan performance will be.
- Limit the number of periods of data in your financial planner.

Timesheet

- Limit the number of tasks in your timesheets. Be sure to delete tasks that you are not recording time to. The fewer tasks in your timesheet, the faster it will load.

Work Plan

- Limit the number of tasks in your work plans. The fewer tasks in your work plan, the faster it will load.
- Limit the levels of hierarchy in your work plan. 4-5 levels max is best practice, but the fewer layers, the better.
- If you find that your project is very large, with a lot of tasks and levels of hierarchy, consider breaking that large project into several sub-projects.
- You may also want to consider using Activities to break down tasks into smaller work items rather than creating several tasks and additional layers of hierarchy. Using Activities reduces the number of tasks and layers of hierarchy in your work plan, which helps improve performance.
- Do not assign too many resources to tasks. The more resources assigned to a task, the slower the load time.