OnePlan Administration

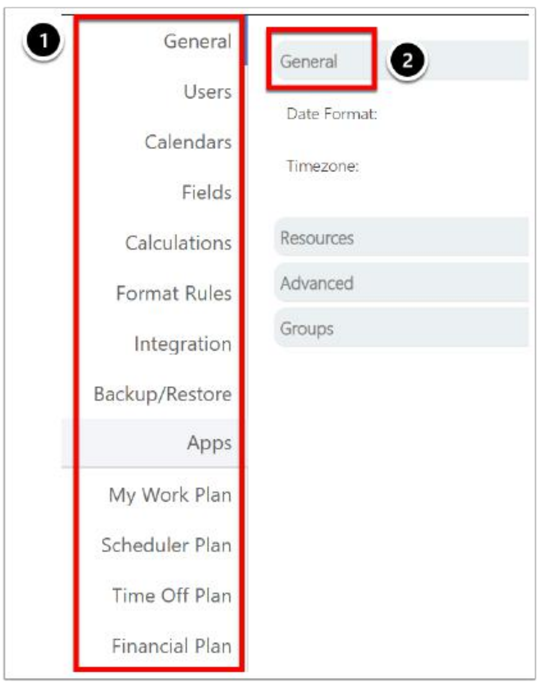
Table of Contents

General

How do I access the admin settings?

If you have the appropriate level of access ("Owner") for a group in OnePlan, you will see the settings gear. Click the settings gear to open the OnePlan Admin settings pages.

1. There is a separate page for each setting section on the left navigation menu.
2. Within each page, expand/collapse each additional topic heading.



Advanced Admin Settings Enabled

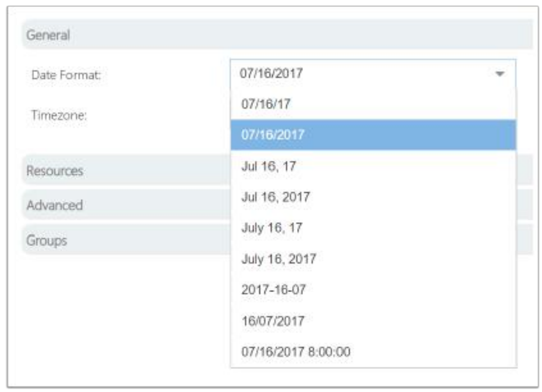
Many settings are considered "advanced" and referenced as such throughout the OnePlan articles. These can be enabled/shown or disabled/ hidden. If needed, contact the OnePlan team to enable for your organization.

How do I set date and time formats?

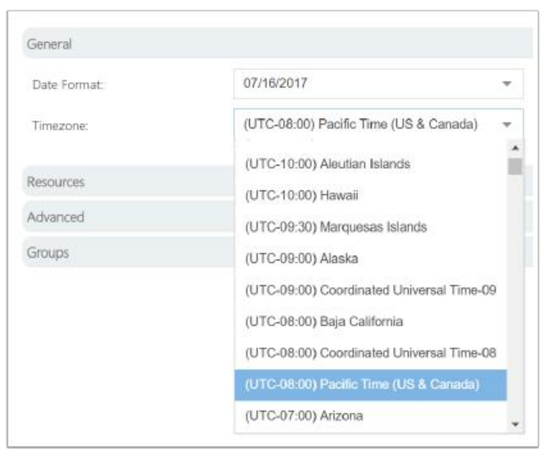
This article explains how to set up the date format & time zone in OnePlan.

Go to the Admin pages, select General in the navigation. Then, expand the General topic heading.

Select Date Format



Select Time Zone



How do I configure general resource settings?

This article explains how to set some of the resource planning settings. These settings are available when the Advanced Settings are enabled.

Go to the Admin pages, select General in the navigation. Then, expand the Resources topic heading.

Set Default Level

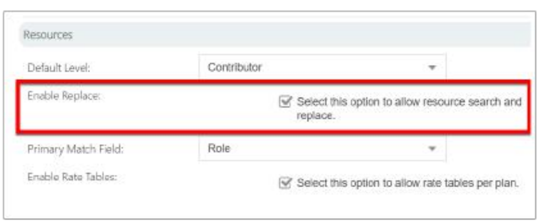
The Default Level is the level of permissions/access given to all new users added to the Resource Center, if the field is otherwise left blank when adding.

Permission Levels Choices:

- None
- Team Member
- Contributor
- Manager
- Owner

Enable Replace

Select this option to allow resource search and replace.

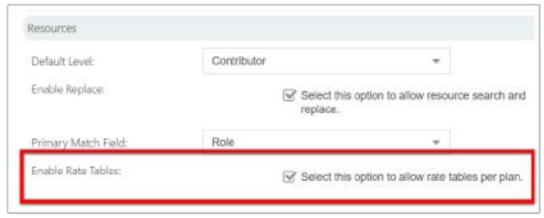


Primary Match Field

Select Role or Department for the primary match field. Role and Department are both Resource-level fields. Go to the Fields admin page and select the Resource topic heading to configure the departments and roles. In the Resource Center, select the department and role for each resource.

Enable Rate Tables

Select this option to allow filling out plan rate tables (applicable to track costs at the plan schedule/tasks



What are the advanced general settings?

This article explains how to set the advanced general settings. These settings are available when the Advanced Settings are enabled.

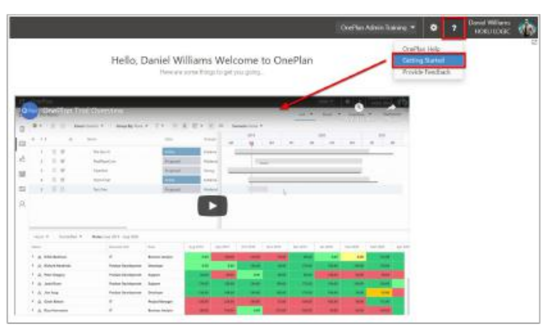
Go to the Admin pages, select General in the navigation. Then, expand the Advanced & Groups topic headings.

Advanced

Welcome Video URL: When users land on the Getting Started page, there is an intro welcome video. If needed, you may show an alternative video. Enter an alternative video URL if you want it to be different than the default.

Enable Customizations: Select this option to allow for customizing the planner with javascript and css.

Welcome Video on the Getting Started Page

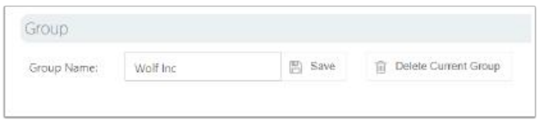


Group Settings

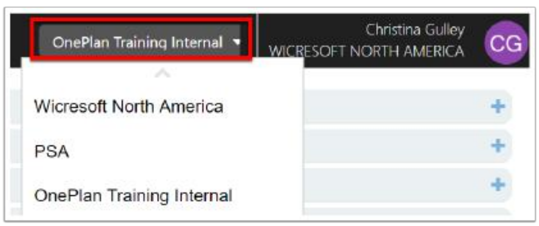
Your Group is your OnePlan environment or instance. Each group has its own settings, resources, content, etc. A typical use of multiple groups is to have a Test group, Prod group, etc.

From the General Settings, you may change the group name, or delete the current group.

CAUTION: Deleting a group deletes all data and settings. This is not to be done except when absolutely sure!



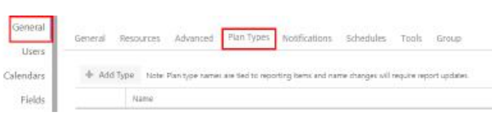
Example Groups



Create and Update Plan Types

This article explains how to create and update Plan Types in OnePlan.

Go to the Admin pages, and select **General** in the navigation. Then go to the **Plan Types** tab to access the Plan Types settings.

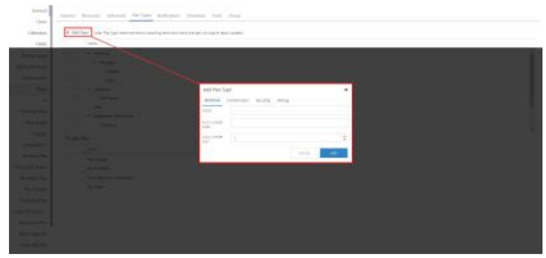


https://player.vimeo.com/video/817386191

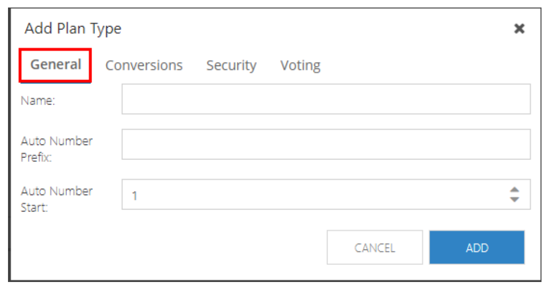
Create Plan Types

To create a top-level plan type:

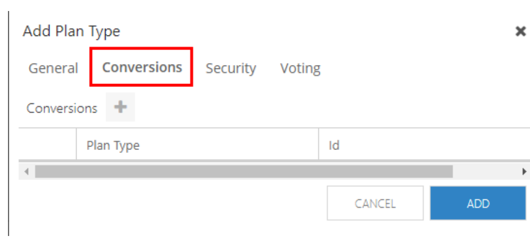
1. Click the **Add Type** button. The **Add Plan Type** form will open.



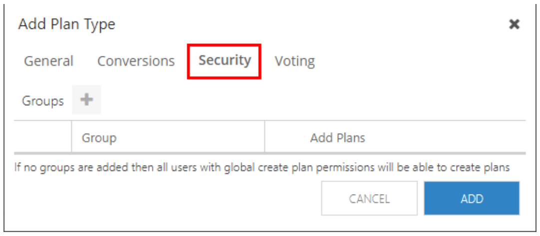
2. Complete the **Add Plan Type** form.
   a. Complete the **General** tab of the **Add Plan Type** form.
      - **Name:** Enter the name of the plan type.
      - **Auto Number Prefix:** Enter a prefix to be automatically appended to plan I.D.s when new plans are created using this plan type.
      - **Auto Number Start:** Enter the number to begin creating plan I.D. numbers when new plans are created using this plan type.



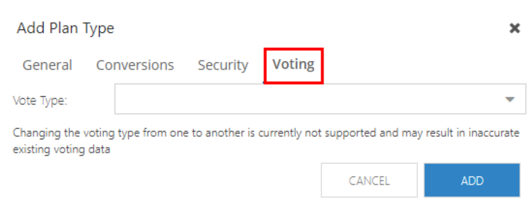
   b. If you want to configure Plan Type Conversions for the new plan type, click on the **Conversions** tab of the **Add Plan Type** form. Then follow the instructions in Set Up Plan Type Conversions.



   c. If you would like to configure Plan Type Security for the new plan type, click on the **Security** tab of the **Add Plan Type** form. Then follow the instructions in Set Up Plan Type Security.



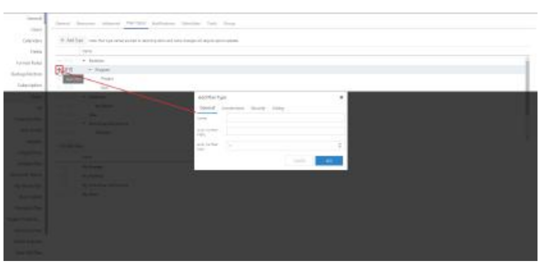
d. If you have the Innovation App installed and would like to configure voting for the new plan type, click on the **Voting** tab of the **Add Plan Type** form. Then follow the instructions in the **Configure the Innovation App Features for Plan Types and Areas** section of Configure the Innovation App.



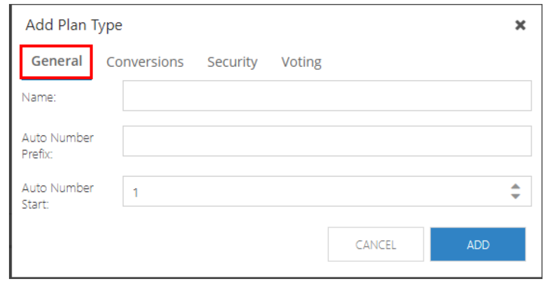
3. Click **Add** to create the plan type.

To create a child plan type:

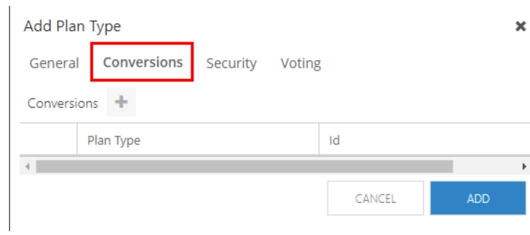
1. Click the Add Child icon (+). The **Add Plan Type** form will open.



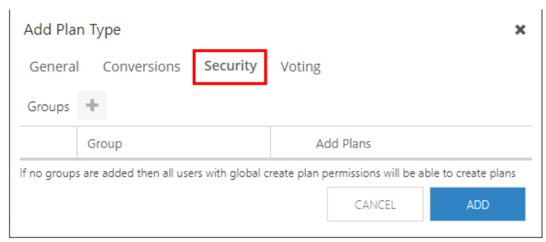
2. Complete the **Add Plan Type** form.
   a. Complete the **General** tab of the **Add Plan Type** form.
      - **Name:** Enter the name of the plan type.
      - **Auto Number Prefix:** Enter a prefix to be automatically appended to plan I.D.s when new plans are created using this plan type.
      - **Auto Number Start:** Enter the number to begin creating plan I.D. numbers when new plans are created using this plan type.



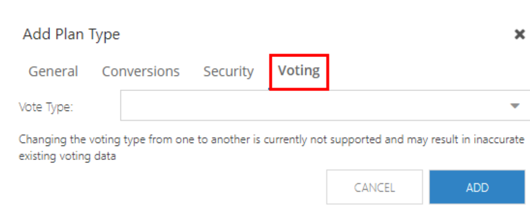
   b. If you want to configure Plan Type Conversions for the new plan type, click on the **Conversions** tab of the **Add Plan Type** form. Then follow the instructions in Set Up Plan Type Conversions.



   c. If you would like to configure Plan Type Security for the new plan type, click on the **Security** tab of the **Add Plan Type** form. Then follow the instructions in Set Up Plan Type Security.



   d. If you have the Innovation App installed and would like to configure voting for the new plan type, click on the **Voting** tab of the **Add Plan Type** form. Then follow the instructions in the **Configure the Innovation App Features for Plan Types and Areas** section of Configure the Innovation App.

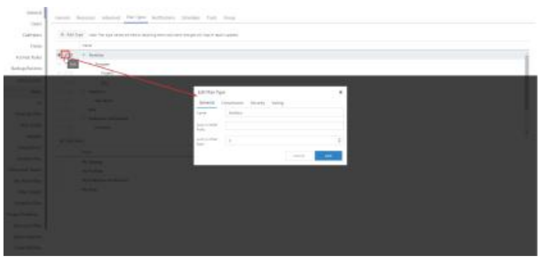


3. Click **Add** to create the plan type.

Update Plan Types

To update plan types:

1. Click the **Edit** icon. The **Edit Plan Type** form will open.
2. Update the Plan Type details in the **Edit Plan Type** form.
3. Click **Save** to save the changes to the Plan Type.



> **NOTE**
> Plan type names are tied to reporting items and name changes will require report updates.

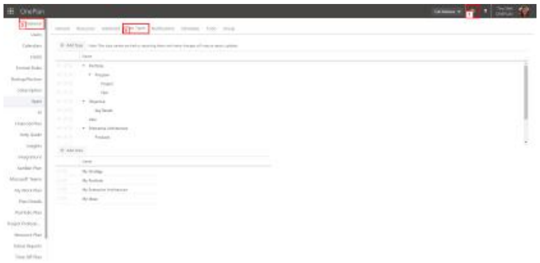
Set Up Plan Type Permissions

This article explains how to set up plan type permissions.

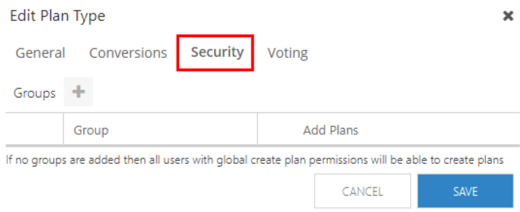
Currently, plan type permissions in OnePlan allow admins to set permissions on the plan type level to allow select Enterprise Security Groups the ability to create plans of that specific type.

This feature enables precise control over plan creation. For example, admins can assign permissions allowing project managers to create projects only, while program managers can create projects within their program. This enhances governance, security, and collaboration.

1. Go to the configuration pages.
2. Go to the **General** settings area > **Plan Types** tab.

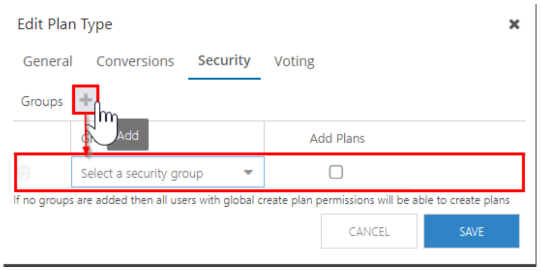


3. Either create a new plan type or edit an existing plan type (see Create and Update Plan Types for instructions).
4. In the **Add/Edit Plan Type** form, go to the **Security Tab**.

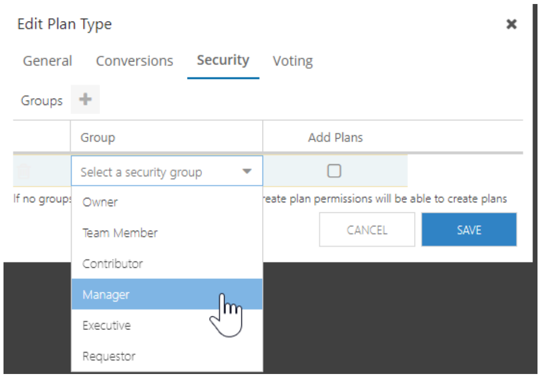


5. Click the **Add Group** button. A row will be added to the form below.

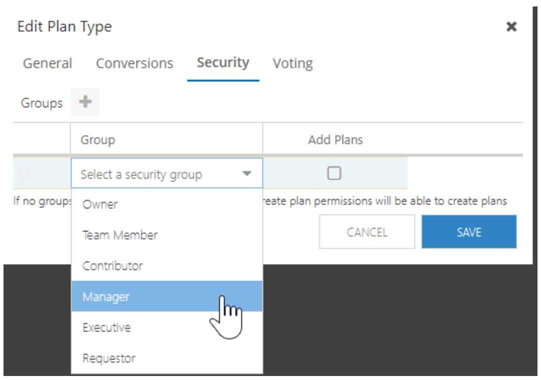
> **NOTE**
> If no groups are added then all users with global create plan permissions will be able to create plans.



6. Click into the **Group** field for the new row, and select the desired Enterprise Security Group. Please Configure and Manage Enterprise Security Groups for more information on Enterprise Security Groups.



7. Check the **Add Plans** check box to enable the selected Enterprise Security Group the ability to create new plans of the current plan type.



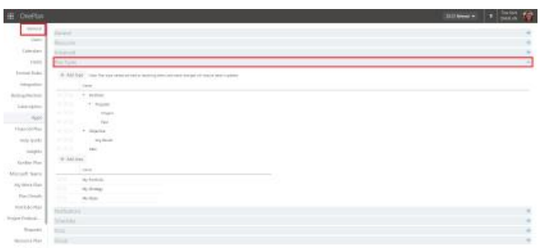
8. Click **Save**.

Set Up Plan Type Conversions

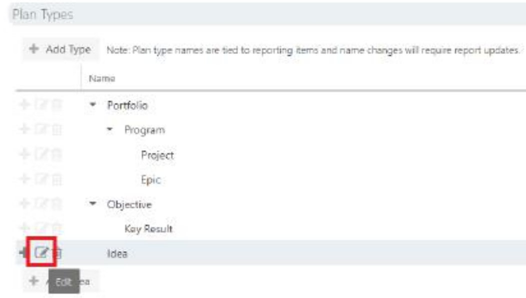
This article explains how to set up plan type conversions.

You must have Owner permissions to access the configuration settings.

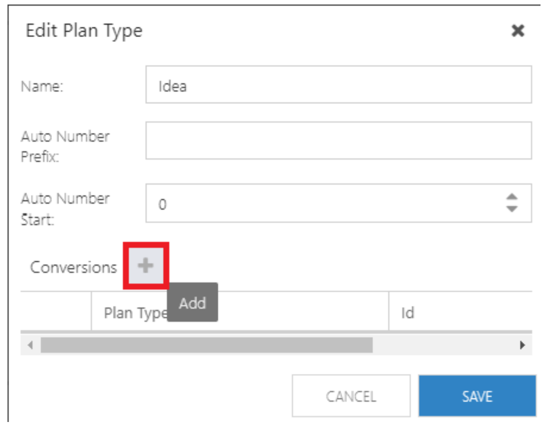
1. Go to the configuration settings > **General** > **Plan Types**.



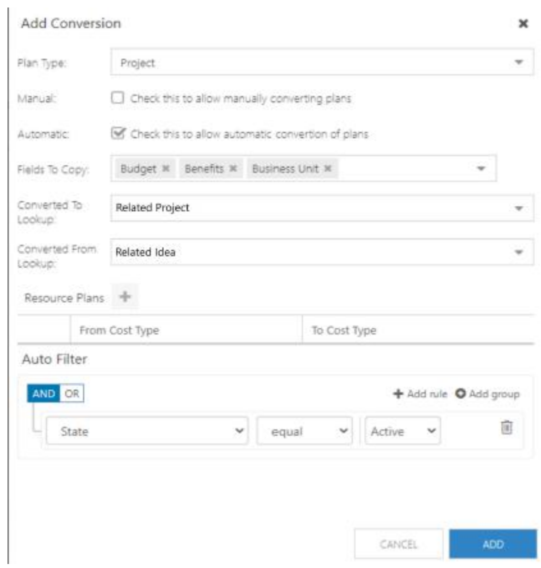
2. Click the **Edit** icon for the plan type that you would like to convert into other plan types. In this example, I will select **Idea**.



3. Under "Conversions", click **Add**. The **Add Conversion** form will open.



4. Complete the **Add Conversion** form:



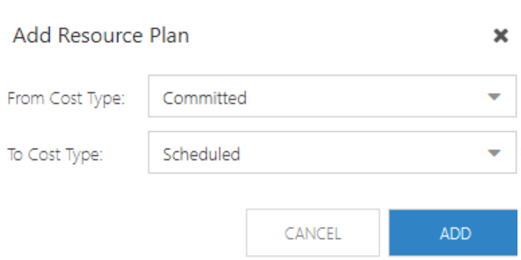
- **Plan Type**: Select the plan type you would like to convert to. In this example, I want Ideas to convert to Projects.
- **Manual**: Check the checkbox to allow manually converting plans.

- **Automatic**: Check the checkbox to allow automatic conversion of plans. If automatically converting plans, you will need to setup Auto Filters.
- **Fields to Copy**: Select the plan-level fields that you would like to copy over in the plan type conversion. In this example, I want the Budget, Benefits, and Business Unit fields from Ideas to copy over to the Projects when they convert.
- **Converted To Lookup**: Select a lookup field from the drop-down. The Converted To Lookup is the field used in the original plan type that will point to the new plan.
- **Converted From Lookup**: Select a lookup field from the drop-down. The Converted From Lookup is the field used in the new plan that points back to the original plan.

> **NOTE**
> The Converted To and Converted From Lookup fields are for lookups between the original plan and the new plan so you can link between them.

- **Resource Plans**: If you are converting from plan types with resource plans, you need to setup the resource plan conversion here.
    a. Click the **Add** icon. The **Add Resource Plan** form will open.

    b. Select the **From Cost Type**. In this example, I selected **Committed**.
    c. Select the **To Cost Type**. In this example, I selected **Scheduled**.
    d. Click **Add**.



- **Auto Filter**: Set up filters to trigger automatic plan conversions. In this example, I have the Auto Filter set so when Ideas are moved to the Active state, they will automatically convert to Projects.

> **NOTE**
> The **Automatic** checkbox needs to be checked for the filter to function.

5. Click **Add**.
6. Click **Save**.

Create and Manage Areas

This article explains how to create and manage Areas in OnePlan.

Go to the Admin pages, select General in the navigation.

Areas make up the main sections of OnePlan, and can be found in the main navigation bar.

https://player.vimeo.com/video/817368798

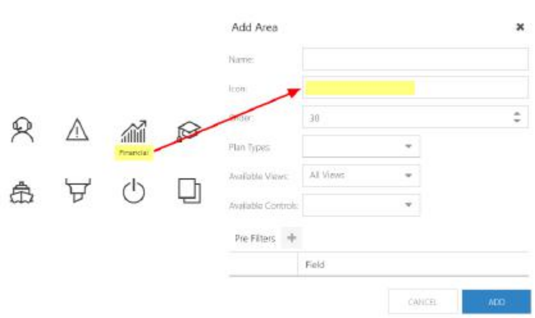
Create Areas

To create an Area:

1. Click the **Add Area** button. The **Add Area** form will open.

2. Complete the **Add Area** form.

- **Name:** Enter the name of the Area.
- **Icon:** Enter the icon to display in the OnePlan main navigation bar. Enter the hover name of the desired icon from https://developer.microsoft.com/en-us/fluentui#/styles/web/icons

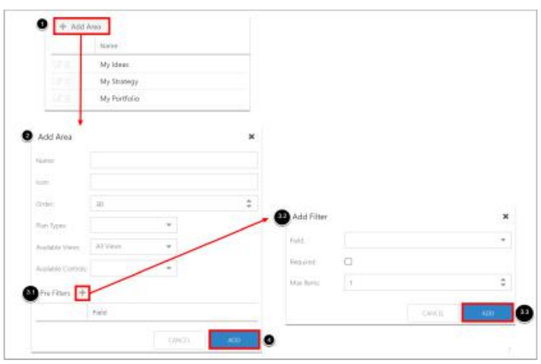


- **Order**
- **Plan Types:** Select the plan type to display in the Area. Choose top-level plans only.
- **Available Views:** Select the desired view options for the Area. Options are List, Board, Roadmap, Dashboard. Default is All Views.
- **Available Controls:** Select the desired control options for the Area. Options are Gantt, Pivot, Financials, Resource Plans.

3. (*Optional*) Add pre filters to the Area.

1. Click the Add Filter icon (+). The Add Filter form will open.
2. Complete the Add Filter form.
   - **Field:** Select the field to filter for to narrow the items returned when loading an Area.
   - **Required:** Check the check box if the pre filter is required for the Area.
   - **NOTE:** If the **Required** check box is checked, data will not load in the Area until the pre filter is entered.
   - **Max Items:** Enter the maximum number of items to return in the pre filter query.
   - **NOTE:** There is no limit to the maximum number of items. Fewer items returned will improve performance.
3. Click **ADD** to add a pre filter to the Area.

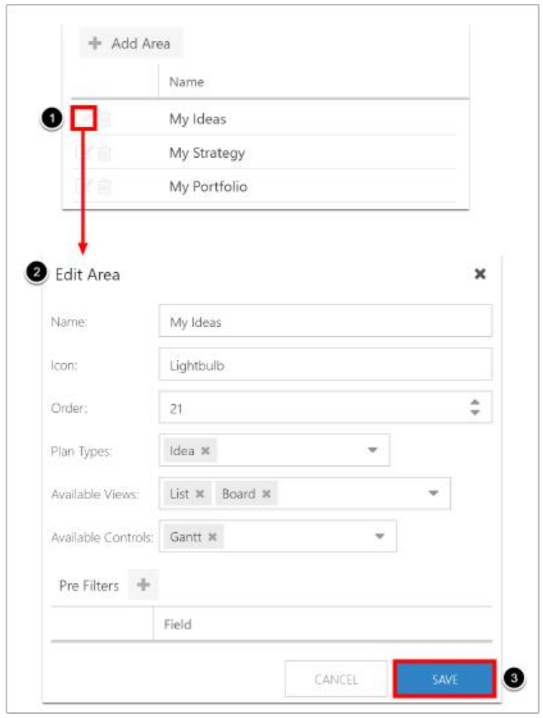
4. Click **ADD** to create the Area.



Edit Areas

To edit an Area:

1. Click the **Edit** icon. The **Edit Area** form will open.
2. Updated the Area details in the **Edit Area** form.
3. Click **SAVE** to save the changes.



Manage System Notifications

This article explains the various available system notifications in OnePlan. As the Admin/Owner of your OnePlan group, you may select to disable any notifications as needed, as well as customize the out-of-the-box notifications to better meet your organization's needs.

NOTE

You cannot create new system notifications.

Navigate to the configuration page, and select **General** in the navigation. Then, expand the **Notifications** topic heading.

Out of the Box Notifications Defined

Each notification includes an email to the recipient user(s), as well as a notification in the Notifications center in the OnePlan header menu.

- **{From.Name} has shared the {Plan.Name} with you in OnePlan**: You will receive this notification if another user shares a plan with you in OnePlan. The notification will include a link directly to the plan.

- **Welcome to OnePlan**: You will receive this notification when you first set OnePlan. This notification will include a link directly to your OnePlan environment.
- **You have been invited to OnePlan**: You will receive this notification when you are added as a new resource in a OnePlan environment. This notification contains the same information as the Welcome to OnePlan notification.
- **New Comment on {TaskName} in the {Plan.Name} plan**: You will receive this notification when another user comments on a task that you are assigned to, or have already commented on. The notification will include a link for you to view the comment thread and respond.
- **Please Update {Plan.Name} in OnePlan**: You will receive this notification if you are an assigned resource to tasks/items on a plan, and the plan owner requests updates for item/task status. The notification will include a list of tasks that need updates, as well as a link to the OnePlan task update form.
- **New Time Off Request in OnePlan**: You will receive this notification if you are a manager or resource manager (depending on your configuration) of a user who has submitted a time off request. The notification will include information regarding the time off request, as well as a link to review the request in OnePlan.
- **New Time Off Approved in OnePlan**: You will receive this notification if your time off request has been approved by your manager. The notification will include information regarding the time off request, as well as a link to review the request in OnePlan.
- **New Resource Request in OnePlan**: You will receive this notification when one of the resources that you manage has been requested for a project. You will only receive this notification if your organization is using resource negotiations, and you are a Resource Manager in OnePlan.
- **Resource Request Approved in OnePlan**: You will receive this notification if your resource request is approved by the resources' Resource Manager. You will only receive this notification if your organization is using resource negotiations, and you are the manager who requested the resource.
- **Resource Request Rejected in OnePlan**: You will receive this notification if your resource request is rejected by the resources' Resource Manager. You will only receive this notification if your organization is using resource negotiations, and you are the manager who requested the resource.
- **New Status Reports in OnePlan**: You will receive this notification when a new status report is generated for your plans. The notification will include a list of all of the plans where a new status report has been generated.
- **New Status Report Ready for Approval in OnePlan**: You will receive this notification when a status report has been submitted for your approval (if your organization is using a status report approval workflow). You will only receive this notification if you are listed as an approver for status reports. The notification will include a link directly to the status report that needs your approval.
- **Timesheet Rejected in OnePlan**: You will receive this notification if a timesheet item you submitted has been rejected by your timesheet approver.
- **Timesheet Not Submitted in OnePlan**: You will receive this notification if you have time entered into your timesheet that has not been submitted, or if you have no hours entered into your timesheet for a given timesheet period. The notification will include a list of all of the timesheet periods that are affected.
- **Timesheet Approvals Needed in OnePlan**: You will receive this notification if you are a timesheet approver, and there are timesheet entries that require your approval. The notification will include a list of all of the timesheet periods that are affected.
- **Resource Plan Comment in OnePlan**: You will receive this notification if another user leaves a comment on a line in one of your resource plans.
- **New Comment on the {TaskName} plan in OnePlan**: You will receive this notification if another user leaves a comment on one of your plans.
- **Resource Request Needs Approval in OnePlan**: You will receive this notification if your resource requests for a plan have been approved but have been changed and require

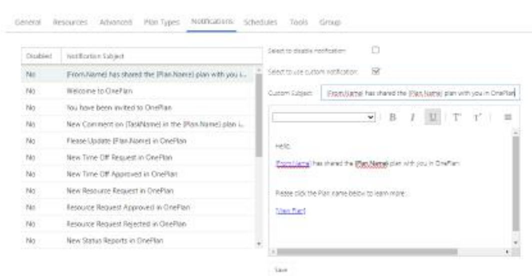
your review and approval again. This notification applies when your organization is using resource negotiations.

- **Status Report Rejected in OnePlan**: You will receive this notification if your status report has been rejected by the status report approver. The notification will include comments from the approver, and a link directly to the report.
- **{WorkPlanNotificationSubject}**: This is the template for work plan notifications. Work plan notifications are configured within the work plans. If you are using work plan notifications, leave this notification enabled and do not alter it.

Customize Notifications

You can adjust the content of the out-of-the-box notifications. To customize the system notifications:

1. Select a notification from the list. This will ioen the settings for that notification.
2. Check the **Select to use custom notification** checkbox.
3. Update the notification subject as desired. If you want to add further information and customization, there are several notification variables available for your use. See Notification Variables for more information on available variables and how to use them.
4. Update the notification message as desired. There are a lot of text formatting options available including bolding, text color, highlighting, text alignment, lists, and more. Additionally, if you want to add further information and customization, there are several notification variables available for your use. See Notification Variables for more information on available variables and how to use them.
5. Click **Save**.



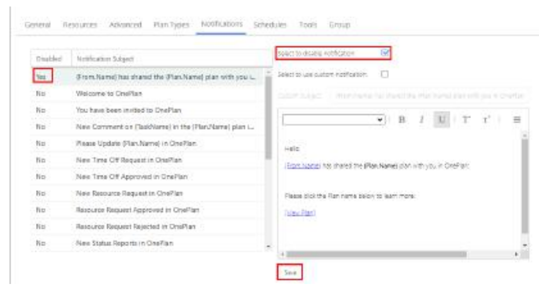
Disable Notifications

NOTE

If you disable a notification, users will not receive the email or the in-system notification.

To disable notifications for all users in your OnePlan group:

1. Select a notification from the list. This will open the settings for that notification.
2. Check the **Select to disable notification** checkbox.
3. Click **Save**. The notification is now disabled for all users in your group. After saving your changes for the notification, the **Disabled** field updates from "No" to "Yes" for the selected notification.



Notification Variables

This article lists and describes the variables available in OnePlan Notifications.

IMPORTANT

OnePlan notification customization was designed to allow end users to put their own custom message into the out of the box notifications, rather than being an open notification workflow.

Notification settings are available in the Config pages > **General** > **Notifications**.

Global Variables

These variables are global variables that can be included in any notification for customization purposes.

- **{SiteUrl}**: Populates with the URL for your OnePlan environment.
- **{ConfigId}**: Populates with the configuration ID for your OnePlan environment.
- **{From.Name}**: Populates with the user name of the notification sender.
- **{From.Email}**: Populates with the user email of the notification sender.
- **{To.Name}**: Populates with the user name of the notification receiver.
- **{To.Email}**: Populates with the user email of the notification receiver.
- **{Now}**: Populates with the current date.
- **{NotificationId}**: Populates with the notification ID.

If a specific plan is included in a notification, you can use the following variables as well:

- **{Plan.Name}**: Populates with the name of the specified plan.
- **{Plan.Id}**: Populates with the Id of the specified plan.
- **{Plan.Url}**: Populates with the URL of the specified plan.
- **{Plan.[Field]}**: Populates with field names from the specified plan.

Notification Specific Variables

IMPORTANT

These variables are only available in the out of the box notifications. They can only be used in the notifications that they exist in out of the box. These variables cannot be used in other notifications. This information is included in this article so you can better understand how the out of the box notifications work.

NOTE

Even though the following variables are locked into their specific notifications, you can still customize the message text for the notifications.

Task Notification Variables

- **{TaskName}**: Populates with the name of the Task the notification is referencing.
- **{TaskList}**: Populates with a list of tasks that have not been updated.
- **{Comment}**: Populates with the latest comment made on a task or resource plan that the notification is referencing.

Resource Notification Variables

- **{Resources}**: Populates with a list of resources that are requested for a given plan.
- **{Comment}**: Populates with the latest comment made on a task or resource plan that the notification is referencing.

Time Off Notification Variables

- **{Category}**: Populates with time off category for a time off request.
- **{Start}**: Populates with time off start date for a time off request.
- **{End}**: Populates with time off end date for a time off request.
- **{Notes}**: Populates with any notes included with a time off request or timesheet submission.

Timesheet Notification Variables

- **{Period}**: Populates with the timesheet period referenced by the notification.
- **{PeriodList}**: Populates with a list of timesheet periods that do not have any hours logged, or have unsubmitted time.
- **{Notes}**: Populates with any notes included with a time off request or timesheet submission.

Satus Report Notification Variables

- **{ReportLink}**: Populates with a link to the referenced status report.

- **{PlanList}**: Populates with a list of plans that have status reports available.
- **{Comments}**: Populates with the latest comment made on status report approval or rejection.

Manage and Delete a Group

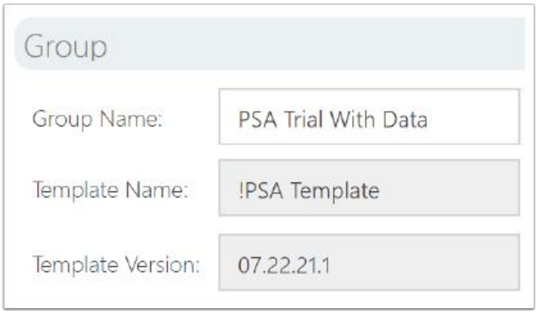
This article explains how to delete a group in OnePlan.

Go to the Admin pages, select General in the navigation. Open the Group topic heading.

Group Information

To view information about the current group, expand the Group topic heading. The following information will be available:

- **Group Name**: The name of the current group.
- **Template Name**: The name of the OnePlan template used to create the current group.
- **Template Version**: The version of the OnePlan template used to create the current group.



Change Group Name

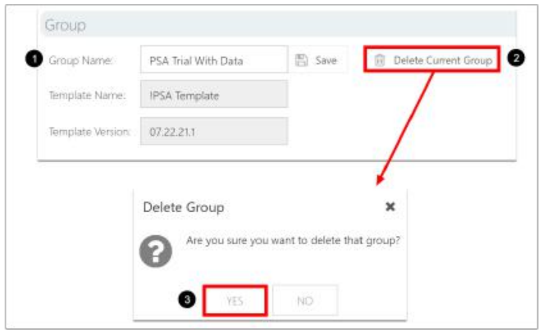
To update a group name:

1. Place your cursor in the **Group Name** field. Delete the old name and enter a new group name.
2. Click **Save**.

Delete a Group

To delete the current group that you are in:

1. Confirm that you are in the correct group that you would like to delete in the **Group Name** field.
2. Click **Delete Current Group**. The Delete Group pop up warning will open.
3. Select **Yes** in the pop up to delete the group.



What are the Tools options?

This article explains what the Tools option are.

Go to the Admin pages, select General in the navigation. Then, expand the Tools topic headings.

Plan Cleanup Tool

The Plan Cleanup tool is used to bulk delete plans.

Plans and all associated data deleted with the Plan Cleanup tool are removed permanently.

To delete plans with the Plan Cleanup tool:

1. Select **Plan Cleanup** from the Tools topic headings.
2. Check the check box next to the plans you wish to remove.
   NOTE: Checking the **Plan** check box at the top of the window will select all plans.
3. Select **Delete Selected Plans.**
4. In the warning pop-up, select **Yes** to confirm that you would like to delete the selected plans. Select **No** to cancel.

Config Update Tools

Use the Config Update tools to upgrade your configuration if created with old templates.

The Config Update tools include:

- **Add Task Type Field**: This tool adds the Default Task type field to the plan.
- **Fix Plan Type Lookups:** This tool adds lookups for plan types and updates lookup values to the appropriate plan for all plans in the system.
- **Calculate Plans:** This tool recalculated all plans. The tool also adds WBS codes to plans.
- **Add Availability:** This tool adds resource availability dates.

To use any of the Config Update tools:

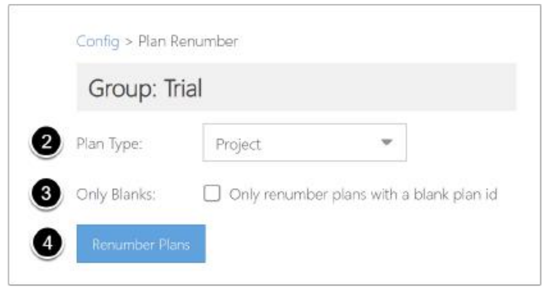
1. Select Config Update Tools from the Tools topic headings.
2. Select **Run Tool** for the desired tool.

Plan Type Renumber Tool

Use the **Plan Type Renumber** tool to renumber plan I.D.s for a given plan type.

To use the **Plan Type Renumber** tool:

1. Select **Plan Type Renumber** from the Tools topic headings.
2. Select the plan type you would like to renumber from the drop down.
3. Check the **Only Blanks** check box to only renumber plans without I.D. numbers.
4. Select **RenumberPlans** to run the tool.



Processes Tool

Use the Process tool to view and manage background processes.

Select **Processes** from the Tools menu to view and manage background processes.

Manage the General Group Settings

Set Up a OnePlan Redirect URL

This article explains how to set up redirect URLs to OnePlan areas.

Within OnePlan (Using JavaScript)

To set up a redirect URL from one OnePlan area to another within OnePlan:

1. Insert the following JavaScript line where needed: **OnePlanCore.Plans.Go(PlanId, "TT_BaseGrid")**.
2. Replace **PlanId** with the plan you want to navigate to.

> **NOTE**
> **"TT_BaseGrid"** will take you to the plan's Work Plan.

Outside of OnePlan (Using a URL GridApp)

To set up a redirect URL to a OnePlan area outside of OnePlan using a URL GridApp:

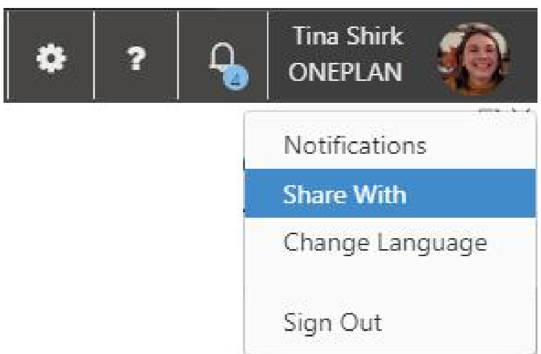
1. Add **&GridApp=[APPID]** to the end of your URL.

2. Replace **[APPID]** with the app where you would like the URL to lead to. Options include:
   - **Work Plan:** "BaseGrid"
   - **Financial Plan:** "CostPlanner"
   - **Resource Plan:** "ResourcePlanner"
   - **Resource Scheduler:** "Scheduler"
   - **Work Plan Board:** "KanBan"
   - **Dashboard:**"Dashboard"

Outside of OnePlan (Using a URL AppId)

To set up a redirect URL to a OnerPlan area outside of OnePlan using a URL AppID:

1. In OnePlan, click on your avatar to open the user preferences menu, and select **Share With**. The Share With form will open.



2. Copy the Shareable Url.

> **NOTE**
> The One Plan URL usually looks like this: **https://my.oneplan.ai?ConfigId=[ConfigID]&AppId=[APP ID]&PlanId=[PLANID]**.

3. To redirect to a specific app within OnePlan, replace **[APP ID]** with one of the following:
   - **My Work:** “c0e2625d-612b-42a0-ad86-ec0e1f38d31e”
   - **My Timesheet:** “36076649-0193-43b2-b364-57248597da8e”
   - **Portfolio Plan:** “2c1a3375-bca0-49d1-ac3d-c9323851eb68”
   - **Resource Plan:** “c6608526-312c-4082-9e55-f60885d4a680”
   - **Resource Scheduler:** “3ecfa551-e375-404d-9388-e70303b371aa”
   - **Resource Center:** “a221fa22-8b95-43ea-b3a4-fc8e5b9bcbac”
   - **Dashboard:** “e0c35416-89b4-45e7-ae21-f589420bfee2"
   - **Notifications:** “fa643f38-47db-4379-b80a-2ab09d7fe550”
   - **Planner:** "00000000-0000-0000-0000-000000000001"

Set Up Google Analytics with OnePlan

This article explains how to set up Google Analytics support to a OnePlan group to allow admins to track information about their OnePlan users.

Set Up Google Analytics

Follow the instructions in the article Set up Analytics for a website and/or app and/or app from Google.

1. Follow all of the steps in **Create an Analytics account**.
2. Follow all of the steps in **Create a new Google Analytics 4 property**.
3. Follow the first two steps in **Add a data stream**. Then expand the **Web** section and follow the instructions.
4. Under **Set up data collection for websites**, follow the instructions in the **Find your "G-" ID (for any platform that accepts a "G-" ID)** section. Copy your "G-" ID (Google Tag ID) and save it for use later in these instructions.

Configure OnePlan

1. In OnePlan, click on the Settings gear to access the Config pages.
2. Go to **General** > **Advanced**. Ensure the **Enable Customizations** checkbox is checked.
3. Copy the following JavaScript script:

```
var tag = 'YOUR_GOOGLE_TAG_ID_HERE';

function addScript( src ) {
return new Promise( ( resolve, reject ) => {
```

```
            const scriptElement = document.createElement( 'script' );
            scriptElement.setAttribute( 'sr
            scriptElement.setAttribute( 'as
            scriptElement.addEventListener(
            scriptElement.addEventListener(
            document.body.appendChild( scriptElement );
        } );
    }
    try {
        addScript( `https://www.googletagmanager.com/gtag/js?id=${tag}` ).then( ( data ) =>
            console.log( e );
        } );    window.dataLayer = window.dataLayer || [];

        function gtag() {
            dataLayer.push( arguments );
        }
        gtag( 'js', new Date() );
        gtag( 'config', tag );
    } catch ( e ) {
        console.log( e );
    }
```

4. Go to '[my/ca/au/eu].oneplan.ai/config/js'. Paste the code into the **Custom JavaScript** form.
5. Replace **YOUR_GOOGLE_TAG_ID_HERE** with your Google Tag ID that you got from the previous section.
6. Click **Save**.

Audit Settings

This article describes the Audit feature settings.

The Audit feature is only available to Enterprise customers. Contact OnePlan sales for more information.

> **IMPORTANT**
> You need to contact OnePlan to activate the Audit feature.

After the Audit feature has been activated, users with "Owner" permissions can access the Audit settings by going to the Config pages > **General** > **Audit**.

The Audit settings include:

- **Audit Points**: Select the areas within OnePlan where you would like to collect audit points. Options include **Resources**, **Plan Details**, **Work Plans**, **Resource Plans**, **Cost Plans**, **Share With**.
- **Retention Days**: Enter how long (in days) you would like to retain your audit information. Max 365 days.
- **Cleanup**: Click the **Cleanup** button to permanently delete data for any audit points that have been removed.
- **Deleted Plan Audits**: Click the **Deleted Plan Audits** button to access the audit logs from deleted plans.
- **Deleted Resource Audits**: Click the **Deleted Resource Audits** button to access the audit logs from deleted resources.
- **Admin Audit Logs**: Click the **Admin Audit Logs** link to access a complete list of all captured audit points from your OnePlan environment.

Innovation App

Configure the Innovation App

This article explains how to install and configure the Innovation App.

The Innovation app allows you to submit and discuss new ideas or requests through a unified system. Engage with requests through voting and marking favorites, facilitate discussions directly within the platform, and streamline workflows.

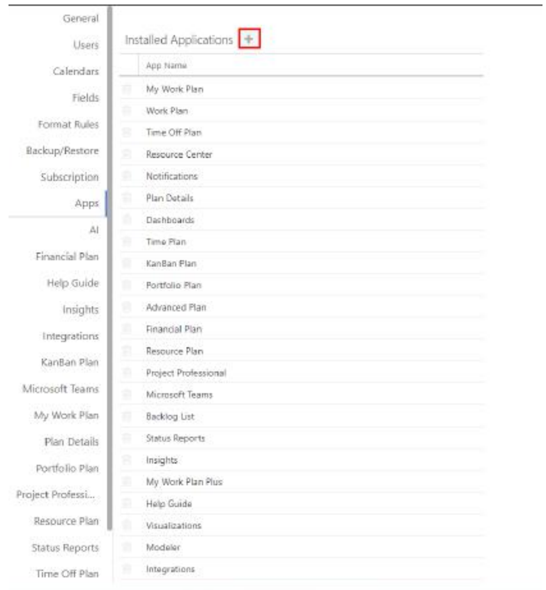
The Innovation App is the next evolution of our Requests App. Just like the Request app, the Innovation app allows users with Requestor licenses and above the ability to create requests, ideas, etc. so you can intake input and ideas from across your organization. The Innovation App adds more functionality to this experience, as all users can vote and comment on submitted ideas to make the intake process more collaborative. Additionally, you can utilize the Innovation App features on any plan type, so you could have voting on Projects, Ideas, Key Results, or any custom plan type you configure for your organization.

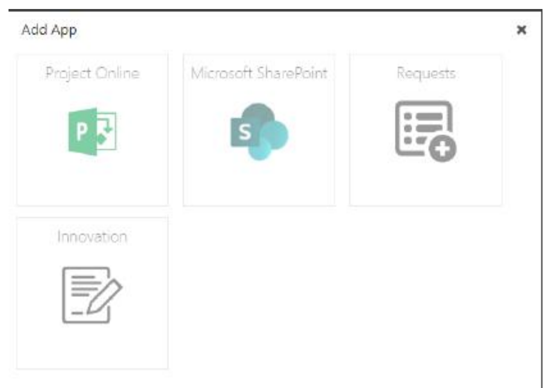
Install the Innovation App

NOTE
The Innovation app will be installed and enabled on all new OnePlan sites.

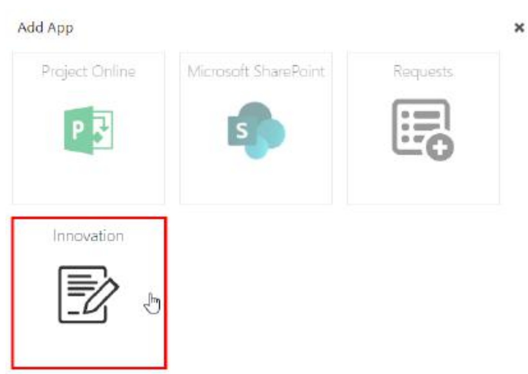
The Innovation App is a new module to OnePlan. You need to ensure that the Innovation App is installed in the back end in order to utilize its functionality. To install the Innovation App:

1. Go to the configuration pages > **Apps**.
2. Click **Add App**. The **Add App** form will open.

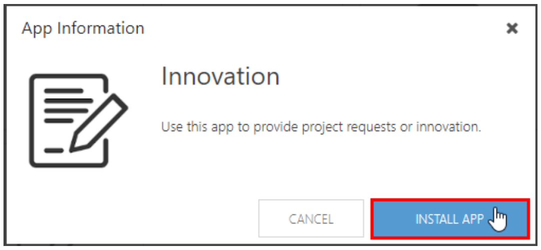




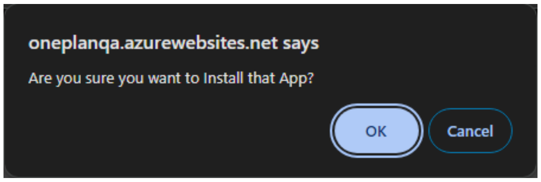
3. Select the **Innovation** app from the list.



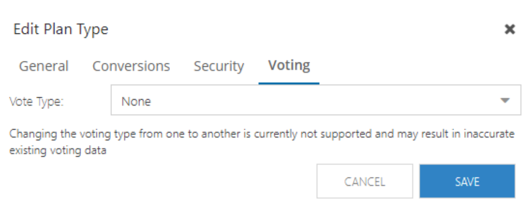
4. Click **Install App**.



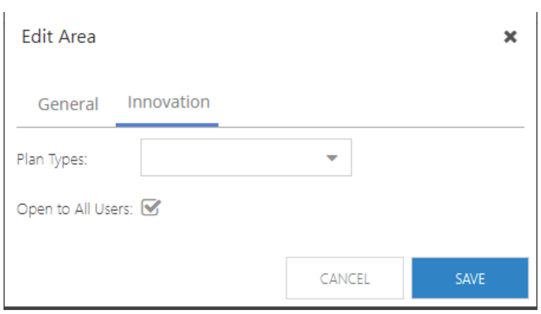
5. Confirm the app install, and allow the app to install in your OnePlan group.



After the Innovation app has installed, go to **General** > **Plan Types**, and click the **Edit** icon next to a Plan Type. There will now be a **Voting** tab in the plan type settings, where you can configure the Innovation features for that Plan Type.

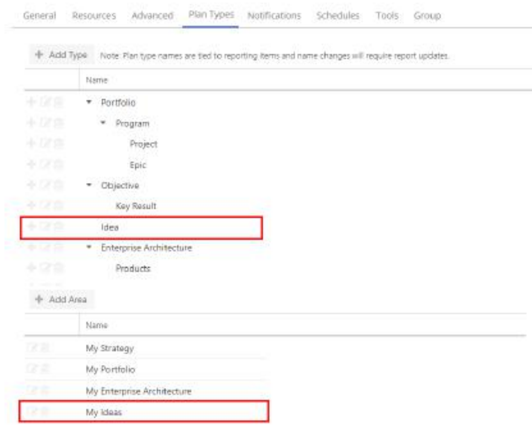


Click on the **Edit** icon next to an Area. There will now be an Innovation tab in the Area settings, where you can configure the Innovation features for that Area.

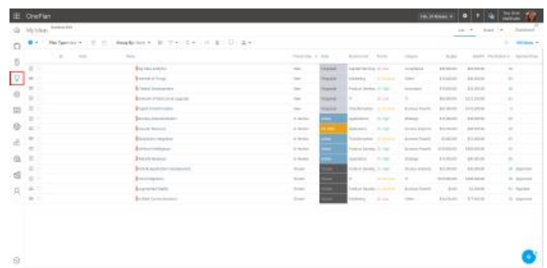


Configure the Innovation App Features for Plan Types and Areas

In this example, we will configure the Innovation App for the **Ideas** Plan Type in the **My Ideas** Area.

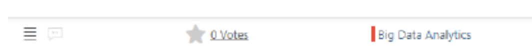


This is what the My Ideas Area and the Ideas Plans look like before the Innovation App is enabled:

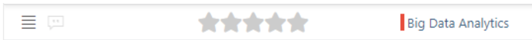


Now let's enable the Innovation App for the Ideas Plan Type and the My Ideas Area and see what happens on the front end.

1. Go to the configuration pages > **General** > **Plan Types**.
2. Click the **Edit** icon for the **Ideas** Plan Type. **The Edit Plan Type** form will open.
3. Go to the **Voting** tab in the **Edit Plan Type** form.
4. Select the **Vote Type** you would like to use. Options include **Vote** and **Stars**. For this example, I will select **Star**.
    - **Vote** means that each user can vote for a plan or not. The voting on the front end will look like this:



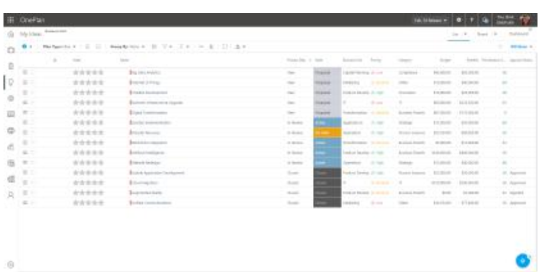
    - **Star** means that each vote is on a 1 to 5 star rating. Users can vote and give a plan a rating out of 5. The voting on the front end will look like this:



NOTE
You cannot change the Vote Type once it is set up.

5. Click **Save**.
6. Click the **Edit** icon for the **My Ideas** Area. The **Edit Area** form will open. The reason we are editing the **My Ideas** Area is because this is the Area where the **Ideas** Plan Type is associated with.
7. Go to the **Innovation** tab of the **Edit Area** form.
8. Select the Plan Types you will allow users to vote and comment on. In this case, **Ideas**.
9. Check the **Open to All Users** check box. This will allow all OnePlan users in your group with any permission level to create, vote on, and comment on the set Plan Type.
10. Click **Save**.

And with that, the Innovation App is configured for the **Ideas** Plan Type in the **My Ideas** Area. Back on the front end, the My Ideas Area now looks like this, with a new **Votes** column where users can vote on Ideas that they like.



Users

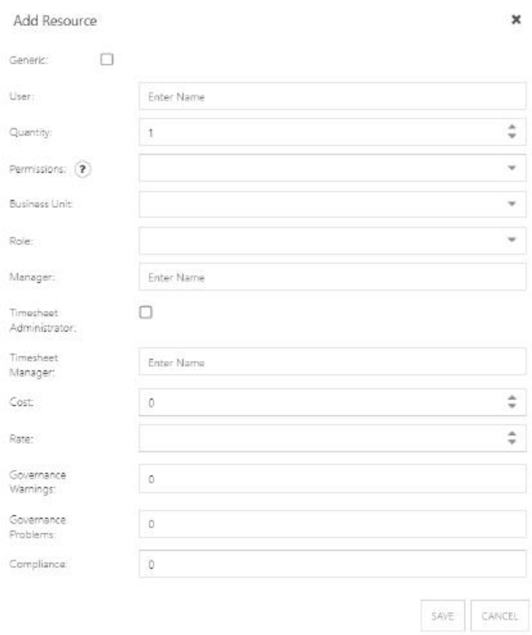
How do I add resources to OnePlan?

This article explains how to add resources to your OnePlan environment.

1. Go to the Resource Center .
2. Click **Add Resource** . The **Add Resource** form will open.
3. Complete the **Add Resource** form. To create a names resource, see Create a Named Resource [29]. to create a generic user, see Create a Generic Resource. [30]
4. Click **Save** to create the resource.

Create a Named Resource

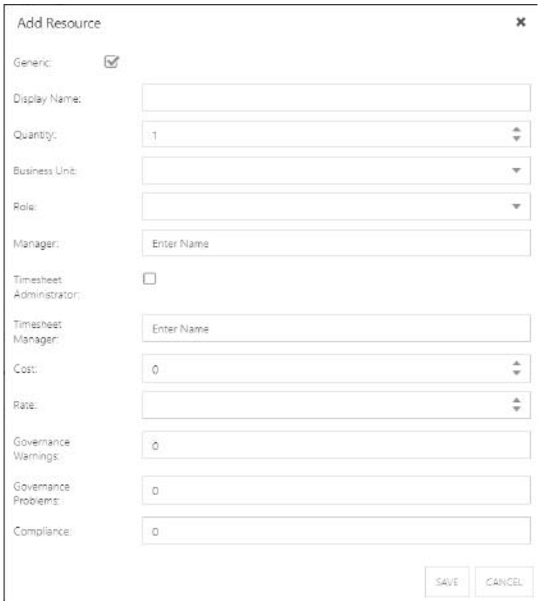
Any additional fields that are configured as resource-level fields on the Fields page will show on the new and edit resource forms.



- **Generic**: Leave the check box unchecked if the resource is a named user.
- **User** (Name): Begin typing the name of the user. The available names will authenticate based on user accounts in your 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.
- **Permissions**: Select the appropriate permissions level. If you need a reminder, hover over the (?) button to see the permission level information.
  - **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.

Create a Generic Resource



- **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.

How do I set Resource Managers?

This article explains how to indicate who the resource managers are. This is important for who is responsible to review/approve the resource plan commitments for the resources, when the Resource Negotiations feature is enabled.

Go to the Admin pages, select Users in the navigation. Then, expand the Resource Managers topic heading.

When resource managers are set, a pre-filter is automatically created for the Resource Planner. See How the Resource Manager pre-filter works for more information.

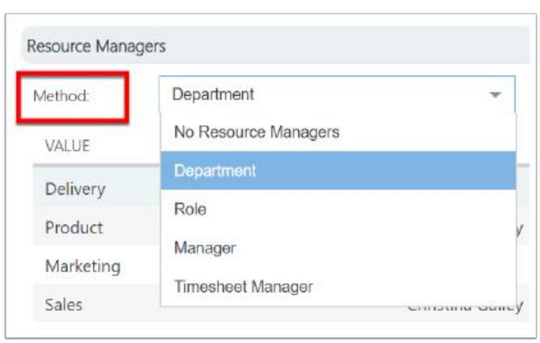
1. Select Method

Method: Select No Resource Managers, Department, Role, Manager, Timesheet Manager.

Note: Timesheet Manager only shows if the Timesheets App has been added.

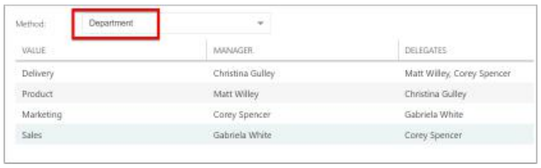
Based on the selection here, the resource manager will be the user who reviews and approves resource plan allocations. This applies if the Resource Negotiations are enabled. If Negotiations are disabled, select No Resource Managers as the method.

If you select Manager or Timesheet Manager as the method, the field values from each resource's form will be the resource manager. If you select Department or Role, follow the next steps to designate managers and delegates.

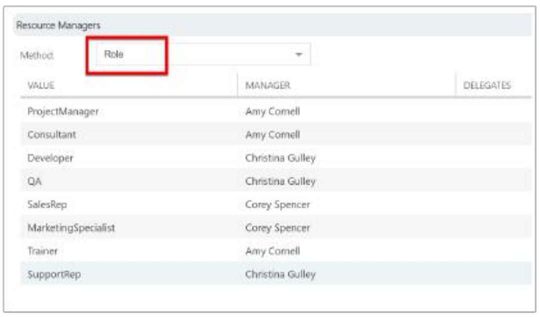


2. Designate the Manager

If you select Department or Role, a table with the configured departments or roles shows. Departments and Roles are both configured on the Fields admin page, under the Resource topic heading. Designate the one manager for each department or role, based on method selected.


Method: Department

VALUE	MANAGER	DELEGATES
Delivery	Christina Gulley	Matt Willey, Corey Spencer
Product	Matt Willey	Christina Gulley
Marketing	Corey Spencer	Gabriela White
Sales	Gabriela White	Corey Spencer

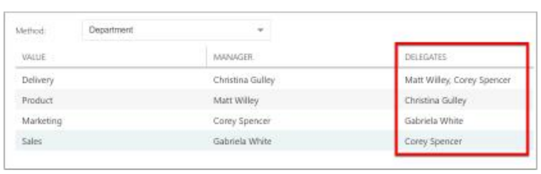

Resource Managers

Method: Role

VALUE	MANAGER	DELEGATES
ProjectManager	Amy Cornell	
Consultant	Amy Cornell	
Developer	Christina Gulley	
QA	Christina Gulley	
SalesRep	Corey Spencer	
MarketingSpecialist	Corey Spencer	
Trainer	Amy Cornell	
SupportRep	Christina Gulley	

3. Designate Delegates

Designate the delegates (multiple allowed) for each department or role, based on method selected. These are the default delegates for each department or role. Each manager will also be able to change the delegates for any groups that they are the designated manager.


Method: Department

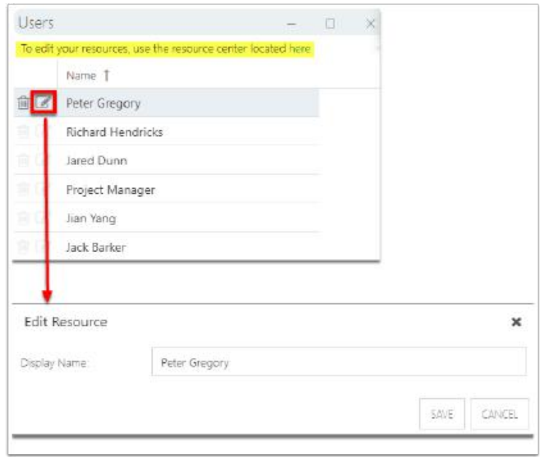
VALUE	MANAGER	DELEGATES
Delivery	Christina Gulley	Matt Willey, Corey Spencer
Product	Matt Willey	Christina Gulley
Marketing	Corey Spencer	Gabriela White
Sales	Gabriela White	Corey Spencer

How do I edit a resource?

This article explains how to edit a resource's details.

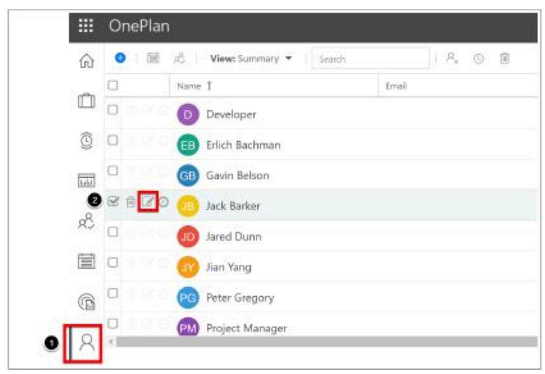
From **Admin > Users**, you can edit a resource's display name and permissions (depending on if the resource is generic or not).

To fully edit resource details, go to the **Resource Center**.



Edit a Resource

1. Go to the **Resource Center**.
2. Select the resource you would like to edit. Click the edit button.
3. Update the **Edit Resource** form.



Edit Resource Form Fields

- **Generic**: Leave check box unchecked / No.
- **User** (Name): Begin typing the name of the user. The available names will authenticate based on user accounts in your 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.
- **Permissions**: Select the appropriate permissions level. See User permissions.
- **Business Unit**: Select business unit. Available Business Unit choices are configured on the

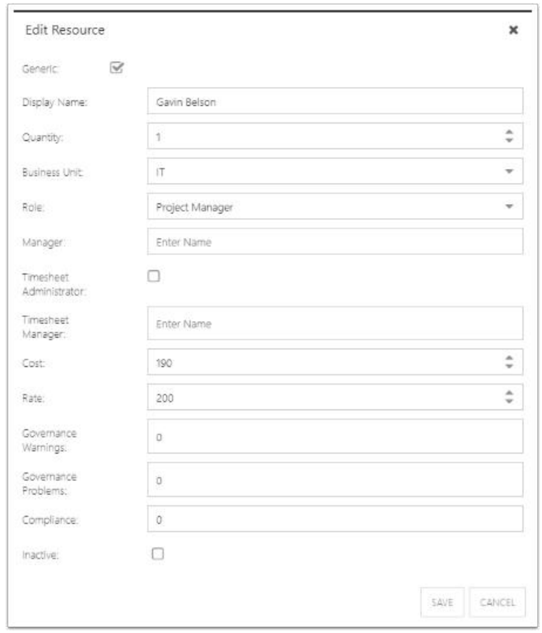
Fields page, in the section for resource-level fields.

- **Role**: Select primary role. Available Role choices are configured on the Fields page, in the section for resource-level fields.
- **Standard Rate**: Enter the rate for this user, if different than the rate associated to this user's role (configured on the Cost Categories page).
- **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 how much this resource will cost the company. You can use a blended rate.
- **Standard Rate**: Enter the rate for this user, if different than the rate associated to this user's role.
- **Governance Warnings:** This is based on compliance of your projects and shows up on your Insights Page.
- **Governance Problems:** This is based on compliance of your projects and shows up on your Insights Page.
- **Compliance:** This is based on compliance of your projects and shows up on your Insights Page.
- **Inactive** - Check box if a resource is no longer going to be used in resource planning or using the system.

When editing a resource, it cannot be changed from a named user to a generic or vice-versa. The Display Name field cannot be modified for a named user, as it is tied to that user's Office 365 account.

Marking a resource **Inactive** will remove that user from the license count for your organization.

Any additional resource-level fields that have been configured on the Fields page (under the Resource heading) will show on the Resource form. Update the fields as needed.



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.

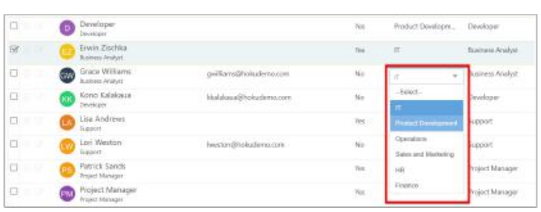
- **Owner:** The user can create plans and plan content. The user can view and edit all plans and plan content. The user can access and configure OnePlan administration settings.

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.

Resource Center Editable In-Line

Click on a field value in the Resource Center to edit it. If the field you want to update isn't in the view, you may Add Column to add to the view.



How do I manage AD synchronization?

This article explains how to set up and manage the synchronization between AD (Active Directory) & the OnePlan Resource Center.

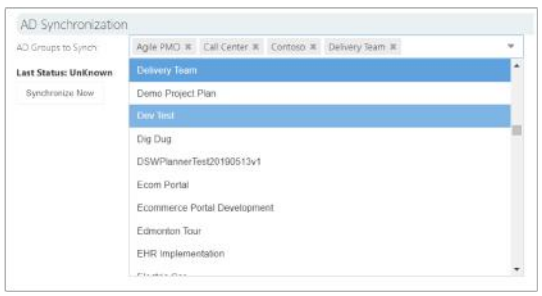
Go to the Admin pages, select Users in the navigation, then expand the AD Synchronization topic heading.

> **NOTE**
> OnePlan supports only Microsoft 365 groups in AD synchronization. Other groups like Distribution list and Security groups do not work with AD sync.

Select AD Groups

Expand the AD Groups to Synch drop down see all AD groups. Multi-select the desired groups to synch.

The synchronization is an Add-Only synch, meaning, if you remove groups from the selection, users will not be deleted from the Resource Center.



Synchronize Now

Click the Synchronize Now button to synch on demand. The following fields come over from AD to the Resource Center: Name, Email Address.

The Last Status will show.

Configure and Manage Enterprise Security Groups

This article explains how to configure and manage enterprise security groups in your OnePlan environment.

The enterprise security groups feature will allow for more control over what OnePlan users can do within OnePlan. This feature will allow administrators to adjust existing group permissions, or create new groups with specific permission levels. For example, the enterprise security groups feature allows administrators to do the following:

- Choose which apps and areas each security group can see/use. For example, you might limit the modeler to only be seen and used by managers and owners.
- Limit which plan-level apps can be used by each security group. For example, you could allow contributors to view and edit the plan details and the work plan, but not the financial plan.
- Choose which type of license each security group will consume. If you choose a lower-level license, the users in the group will only have access to functionality available to that license type.
- Choose which global permissions each group has (like view all plans or edit all plans).

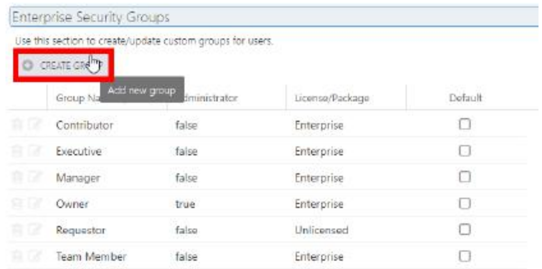
> **NOTE**
> Enterprise security groups only apply for named resources. You cannot assign an enterprise security group to generic resources.

Create New Security Groups

The enterprise security group feature allows administrators to create custom security groups for their users.

To create a new security group:

1. Go to the configuration area > **Users** > **Enterprise Security Groups**.
2. Click **Create Group**. The **Add New Group** form will open.



3. Complete the **Add New Group** form.

- **Group Name**: Enter a name for your security group.
- **License/Package**: Select the kind of license resources in the security group will consume.
- **Group Permissions**: Select the global permissions that resources in the security group will be granted. Options here include
  - **Administrator**: This permission gives users in the group access to the configuration area.

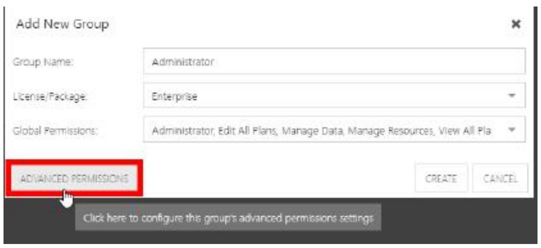
    > **NOTE**
    > The Administrator permission does not give users full access to OnePlan content. You also need to apply other permissions in this list for the users to access all plans, resources, and data in the group.

  - **Edit All Plans**: This permission gives users in the security group edit permissions for all plans in the group.
  - **View All Plans** This permission gives users in the security group read-only permissions to all plans in the group.
  - **Manage Data**: This permission allows users in the security group to create global views, templates, task notifications, etc. for the group.

- **Manage Resources**: This permission allows users in the security group to create and update resources in the Resource Center and view and manage resource data for all resources in the group.

Click **Advanced Permissions** to access more detailed permissions settings for the security group.

> **NOTE**
> Advanced Permissions are only available for security groups using Enterprise licenses.



- **Plan Permissions**:Select the plan-level permissions for the users in the security group. Options include:
  - **Add Plan**: This permission allows users in the security group to create new plans.
  - **Delete Plan**: This permission allows users in the security group to delete plans.
  - **Archive Plan**: This permission allows users in the security group to archive plans.
- **Hide Left Navigation**: This setting allows you to hide global modules (icons in the left navigation bar, available through adding apps) from users in the security group. Choices that are selected will be hidden from users in the security group. Unselected choices will be available to users in the security group.
- **Hide Plan Navigation**: This setting allows you to hide plan-level modules (the views and icons in the header of a plan) from users in the security group. Choices that are selected will be hidden from users in the security group. Unselected choices will be available to users in the security group.
- **Hide Areas**: This setting allows you to hide custom areas (also icons in the left navigation bar, configured by an administrator) from users in the security group. Choices that are selected will be hidden from users in the security group. Unselected choices will be available to users in the security group.

4. If you are in the Advanced Settings section of the configuration form, click **Done** to return to the main page of the configuration form.
5. Click **Create**. Your new security group will become available to assign to your resources.

Update Existing Security Group Permissions

The enterprise security group feature allows you to easily update existing group permissions.

To update security group permissions:

1. Go to the configuration area > **Users** > **Enterprise Security Groups**.
2. Click the **Edit** icon next to the group you would like to update. The **Edit Group** form will open.
3. Update the group permissions as desired. Settings you can update include:
   - **Group Name**: Enter a name for your security group.
   - **License/Package**: Select the kind of license resources in the security group will consume.
   - **Group Permissions**: Select the global permissions that resources in the security group will be granted. Options here include
     - **Administrator**: This permission gives users in the group access to the configuration area.

> **NOTE**
> The Administrator permission does not give users full access to OnePlan content. You also need to apply other permissions in this list for the users to access all plans, resources, and data in the group.

- **Edit All Plans**: This permission gives users in the security group edit permissions for all plans in the group.
- **View All Plans** This permission gives users in the security group read-only permissions to all plans in the group.
- **Manage Data**: This permission allows users in the security group to create global views, templates, task notifications, etc. for the group.
- **Manage Resources**: This permission allows users in the security group to create and update resources in the Resource Center and view and manage resource data for all resources in the group.

Click **Advanced Permissions** to access more detailed permissions settings for the security group.

> **NOTE**
> Advanced Permissions are only available for security groups using Enterprise licenses.

- **Plan Permissions**:Select the plan-level permissions for the users in the security group. Options include:
  - **Add Plan**: This permission allows users in the security group to create new plans.
  - **Delete Plan**: This permission allows users in the security group to delete plans.
  - **Archive Plan**: This permission allows users in the security group to archive plans.
- **Hide Left Navigation**: This setting allows you to hide global modules (icons in the left navigation bar, available through adding apps) from users in the security group. Choices that are selected will be hidden from users in the security group. Unselected choices will be available to users in the security group.
  - **Hide Plan Navigation**: This setting allows you to hide plan-level modules (the views and icons in the header of a plan) from users in the security group. Choices that are selected will be hidden from users in the security group. Unselected choices will be available to users in the security group.
  - **Hide Areas**: This setting allows you to hide custom areas (also icons in the left navigation bar, configured by an administrator) from users in the security group. Choices that are selected will be hidden from users in the security group. Unselected choices will be available to users in the security group.

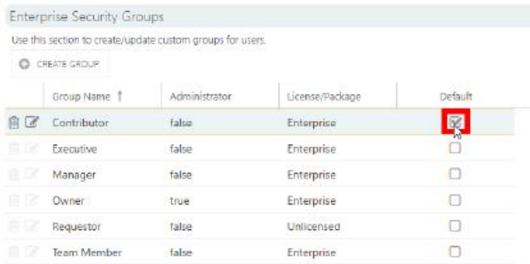
4. If you are in the Advanced Settings section of the configuration form, click **Done** to return to the main page of the configuration form.
5. Click **Save** to save your group updates.

Set a Default Security Group for New Resources

You can select one of your configured security groups to be the default security group assigned automatically to new resources created in the system.

To define a default security group:

1. Go to the configuration area > **Users** > **Enterprise Security Groups**.
2. Identify the desired security group to use as the default group.
3. Check the **Default** check box next to the desired security group. This will now be the default security group assigned to new named resources created in your OnePlan environment.



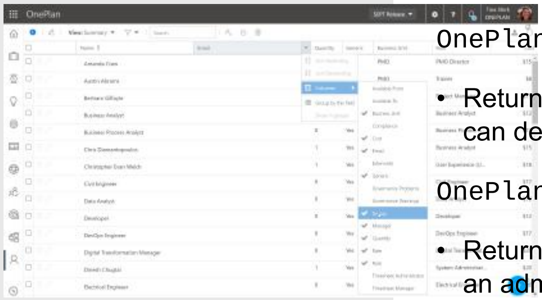
Of course, you can always change the security group for these resources by following the instructions in Assign Resources to Security Groups [37].

Assign Resources to Security Groups

Once your security groups are configured, you will need to assign new or existing resources to a particular security group. To assign resources to security groups:

1. Go to the **Resource Center** in the OnePlan front end.

> **IMPORTANT**
>
> Make sure that the **Group** field is available in your Resource Center view. If it is not, click on the arrow in a column header, and select **Columns** from the drop-down menu to add the **Group** field.



2. For a selected resource, click into the **Group** field, and select the desired security group from the drop-down. The permissions set in the security group settings will now apply to that resource.

3. Repeat this process for all desired resources.

Supported Javascript Functions for Enterprise Security Groups

This JS library is to support the enterprise security group feature and will be utilized to replace the no longer supported "PersonalConfig.GlobalPermissions".

Pick any of the following replacement functions to suit your use case:

`OnePlanCore.Security.GetMySecurityGroup()`

- Return the security group information belonging to the currently logged-in user.

`OnePlanCore.Permissions.CanAddPlan()`

- Return true/false if the currently logged-in user can add plan/not.

`OnePlanCore.Permissions.CanArchivePlan()`

- Return true/false if the currently logged-in user can archive plan/not.

`OnePlanCore.Permissions.CanDeletePlan()`

- Return true/false if the currently logged-in user can delete plan/not.

`OnePlanCore.Permissions.IsAdmin()`

- Return true/false if the currently logged-in user is an admin.

`OnePlanCore.Permissions.CanEditAllPlans()`

- Return true/false if the currently logged-in user can edit all plans.

`OnePlanCore.Permissions.CanViewAllPlans()`

- Return true/false if the currently logged-in user can view all plans.

`OnePlanCore.Permissions.CanManageResources()`

- Return true/false if the currently logged-in user can manage resources.

`OnePlanCore.Permissions.CanManageData()`

- Return true/false if the currently logged-in user can manage data (eq. Global Views/etc).

Updates to Assigning Permissions to Resources in OnePlan APIs

This article explains changes to the Create Resource and Update Resource APIs to assign permissions to resources.

With the release of the Enterprise Security Group feature (released September 2023), there is an update to how permissions are assigned to resources in our APIs. Specifically, the following APIs are affected by the new security groups feature:

- Create Resource API: https://my.oneplan.ai/ApiHelp/Api/POST-api-resources
- Update Resource API: https://my.oneplan.ai/ApiHelp/Api/POST-api-resources-id

Previously we used "GlobalPermissions" to assign a specific resource's permission in OnePlan. With the September 2023 release, "GlobalPermissions" will no longer be supported and will be removed.

Instead, we will now be using "OnePlanSecurityGroup" property to assign the resource's security group. This property will accept the GUID value that represents the security group.

Sample:

```
{
  "Resource": {
    "Name": "sample string 1",
    "Generic": true,
    "Mail": "sample string 3",
    "Office365Id": "85c4140e-e1e3-4623-ae46-77255dbdb079",
    "UserId": "57ae43ae-cd3c-45d4-a0f7-2165267449e8",
    "UserOnly": true,
    "OnePlanSecurityGroup": "4d419998-b76d-401d-9a7f-d9ba08b9d856",
    "Fields": {
      "sample string 1": {},
      "sample string 3": {}
    }
  }
}
```

To get your security groups' GUIDs, use the following query: https://my.oneplan.ai/ApiHelp/Api/GET-api-securitygroups. The query will return list of security groups and search for the "id" property.

In order to set "None" security group to a resource, you will need to set the "OnePlanSecurityGroup" property to an empty guid (00000000-0000-0000-0000-000000000000).

If "OnePlanSecurityGroup" is set to null or if "OnePlanSecurityGroup" is not included in the API request body, the following will be applied:

- A default security group will be assigned only if you have a default security group selected in your OnePlan group settings
- Otherwise, the resource group will be "None"

Enable OnePlan Multi-Authentication

This article explains how to enable OnePlan Multi-Authentication.

With OnePlan Multi-Authentication, you can easily invite users to collaborate with you without requiring them to be added to your company's Office 365/Azure Active Directory. These users can be contractors, customers, or whoever you would like to collaborate with who is outside of your company.

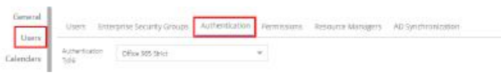
> **IMPORTANT**
>
> By default, the Authentication Type is **Office365 Strict**, meaning only users in your Office365 tenant can access your OnePlan environment. You will need to enable Multi-Authentication if you would like to use this feature.

IMPORTANT

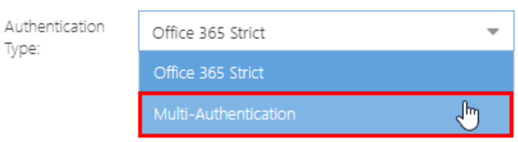
Do not enable Multi-Authentication if you have external users set up in your Azure Active Directory. If you enable Multi-Authentication when you have external AD users, those external users will not be able to access OnePlan.

To enable Multi-Authentication:

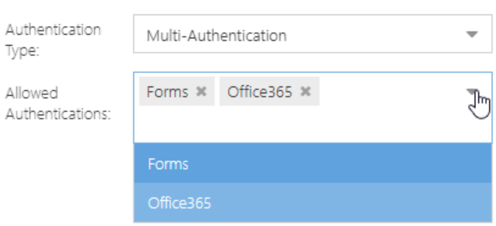
1. Go to the Admin/Config pages > **Users** > **Authentication**.



2. In the **Authentication Type** drop-down, select **Multi-Authentication**.



3. In the **Allowed Authentications** drop-down, select the allowed authentication methods. Options include **Office365**, and **Forms**. Both Authentications are selected by default.



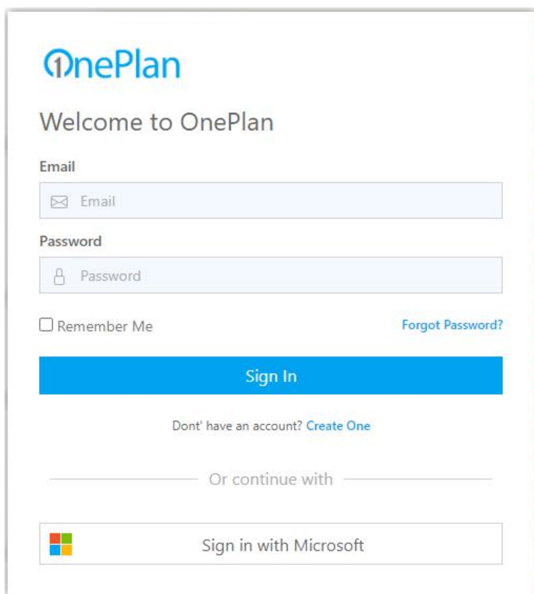
NOTE

Forms is a native OnePlan account that users can create and use to log into OnePlan.

NOTE

Likely, you will want to select both of these Authentications. However, if you are not using Office 365 as an Authentication, you can just select **Forms**.

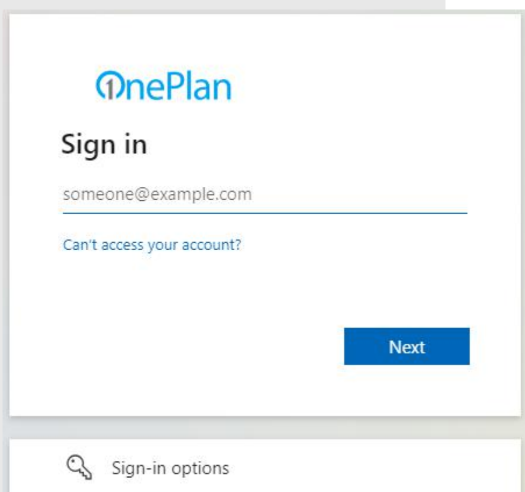
With Multi-Authentication enabled, when users go to OnePlan, they will now be able to login to OnePlan by entering their OnePlan account credentials into the **Email** and **Password** fields (if you have **Forms** as an **Allowed Authentication**), or by using their Office365 credentials by clicking **Sign in with Microsoft** (if you have **Office365** as an **Allowed Authentication**).



NOTE

The login form will display regardless of the authentication method selected (**Office365 Strict** or **Multi-Authentication**).

If you are using **Office365 Strict**, your users can simply click on **Sign in with Microsoft** to access OnePlan. Alternatively, you can send a link directly to your OnePlan environment via the **Share With** link. With **Office365 Strict** authentication, the **Share With** link will send users directly to the Microsoft login screen.



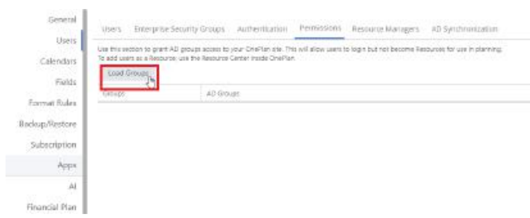
Users - Permissions - Grant Users Access to OnePlan via Entra Groups

This article explains how to grant users access to your OnePlan site without making them Resources. Use the Permissions section of the Users settings to grant Entra / AD groups access to your OnePlan site. This will allow users to log in but not become Resources for use in planning.

To add users as a Resource, use the Resource Center inside OnePlan. See How Do I Add Resources to OnePlan? for instructions.

1. Go to the configuration pages, then **Users** > **Permissions**.

2. Click **Load Groups** to load in the Enterprise Permission Groups for your OnePlan site. You can grant users different levels of access to your site by assigning them to the different Enterprise Security Groups configured in your OnePlan environment.



3. Click into the **AD Group** field for the desired permission group (i.e. the level of access you want to grant the users). Then select the Entra / AD group you would like to grant access. The users in the selected Entra / AD group will now be able to access OnePlan with the set permissions (in this example, Requestor permissions). These users will not be available as Resources for planning, they will just have access to your OnePlan site.

To remove Entra / AD user groups click into the **AD Group** field, and click the X for the Entra / AD group you would like to remove from your OnePlan site.

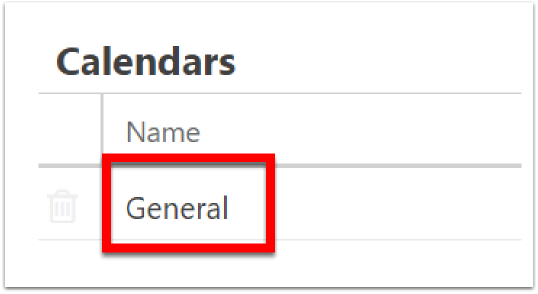
Calendars

How do I manage the calendar?

This article explains how to manage the calendar settings and maintain the calendar of holidays for your organization in OnePlan. The calendar settings apply to working hours for the scheduler and work planning tools. One FTE (Full Time Equivalent) is calculated based on the number of working hours and days as set on the calendar. When holidays are added, the availability in a time period is reduced by the number of hours for that holiday (one working day).

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

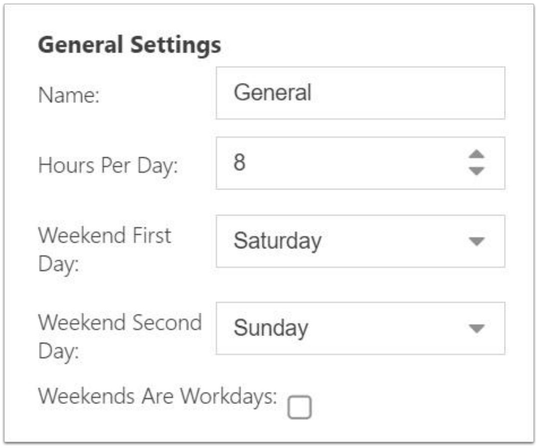
Open General Calendar



There is one calendar called General. Click the calendar name to open the settings for the calendar (to the right).

Do NOT delete the calendar. Do not click the trash can icon next to the General calendar name. The scheduling and resource planning tools depend on it.

General Settings



Update the general settings, as needed.

- Name
- Hours per day
- Weekend First Day: Select which day of the week begins the weekend
- Weekend Second Day: Select which day of the week begins the weekend
- Weekends are Workdays: Select the check box if weekends are work days (to be able to schedule resources to weekend days)

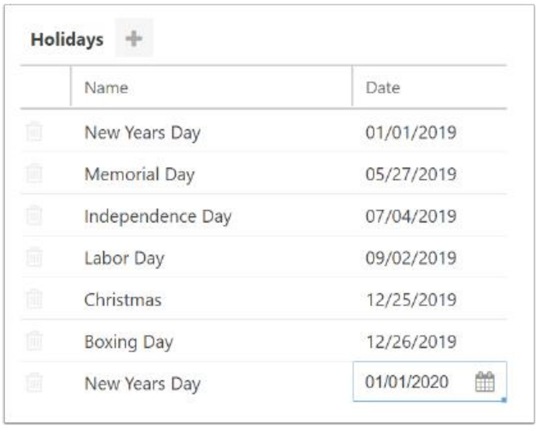
Availability

Add/update the availability hours, if needed. For example, if the working day is 8 AM - 5 PM with a 1 hour lunch, you would have some like the following:

08:00 to 12:00

13:00 to 17:00

Holidays



Holidays

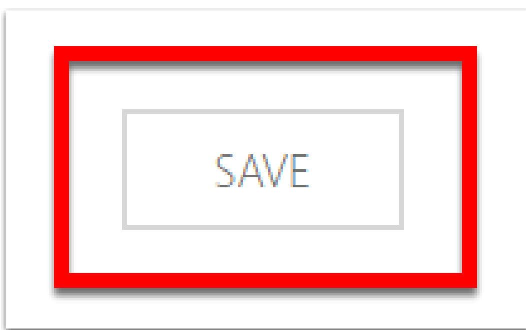
	Name	Date
	New Years Day	01/01/2019
	Memorial Day	05/27/2019
	Independence Day	07/04/2019
	Labor Day	09/02/2019
	Christmas	12/25/2019
	Boxing Day	12/26/2019
	New Years Day	01/01/2020

Add the organization-wide holidays that would affect the availability for all resources.

Enter the holiday name & date. For yearly holidays, you need to enter the holiday for each year.

Note: For user-specific time off (i.e. personal holidays/vacations/PTO), use the Time Off feature to enter and approve.

Most of OnePlan's settings and use is auto-saved as soon as you click or type. For the calendar settings, you must click the **Save** button for any changes to take effect.



Fields

Create and Edit Plan Fields

This article explains how to create and edit plan fields. Plan fields are top-level metadata fields that show on the Plan Details page and Portfolios page.

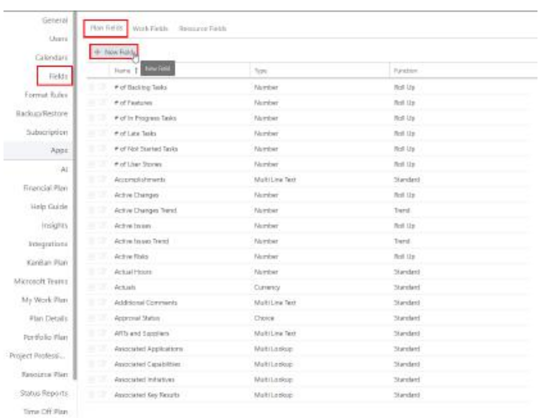
https://player.vimeo.com/video/817397378

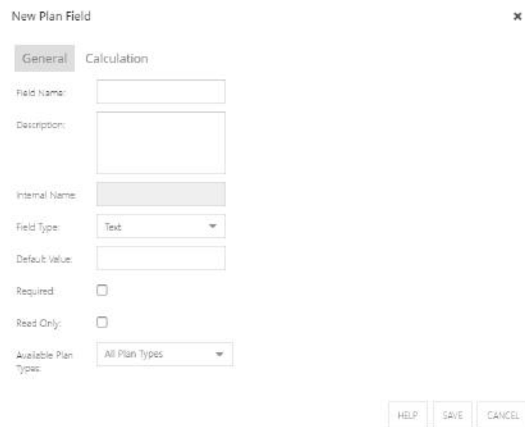
NOTE

Some fields may be created automatically upon installing certain apps. For example, when the Timesheets app, Backlog List app, etc.

Create a New Plan Field

1. Go to the Admin pages, select **Fields** in the navigation. Then, click on the **Plan Fields** tab.
2. Click the **New Field** button. The **New Plan Field** form will open.





3. Complete the **New Plan Field** form.
   a. Complete the **General** tab of the form.
      - **Field Name:** Enter a name for the field.
      - **Description:** Enter a description of the field function, or how the user should interact with the field. This text will appear as a tooltip when a user interacts with the field.
      - **Internal Name:** Will display the internal (back-end) field name when applicable. This field will auto-populate once you save the new field.
      - **Field Type:** Select the field type. See Plan Field Types [45] for more details.
      - **Default Value:** Enter a default value if applicable.
      - **Required:** Check the check box if the field is required.
      - **Read Only:** Check the check box if the field is read-only.
      - **Available Plan Types:** Select one or more plan types where the field is available. If no plan type is selected, it will be available for all plan types.

   b. (Optional) If you would like the new plan field to be a calculated field, complete the **Calculation** tab of the form. See Manage Field Calculations for instructions on configuring field calculations.
4. Once the field configuration is complete, click **Save**.

Plan Field Types

- **Text:** Users can enter one line of free form text.
- **Date:** Users can select a date from a calendar pop up.
- **Number:** Users can enter a numeric value. The admin can set how many decimal places are allowed. See Number Fields [45] for more detail.
- **Currency:** Select a currency. The admin can set up multiple currencies if your organization works cross-nationally. To configure currencies and exchange rates, see What are the advanced Financial Plan settings? [74]
- **YesNo:** Users can check a check box to indicate Yes or No.
- **Choice:** Enter choices. See Choice Fields [45] for more detail.
- **User:** People picker field, tied to user accounts
- **Multi Choice**: Multi Choice fields allow users to select multiple options from the choice options available.
- **Multi Line Text:** Users can enter multiple lines of free text.
- **Lookup:** Users can create relationships between plans in the system.
- **Multi Lookup:** Users can create relationships between plans in the system.
- **Hyperlink**: Users can insert a hyperlink to easily access resources from the internet.
- **Image**: Users can insert a link to an image that is publicly available on the internet. The image will display when the field is used.

For additional details about the Lookup fields types, refer to the article: How do I configure lookup fields?

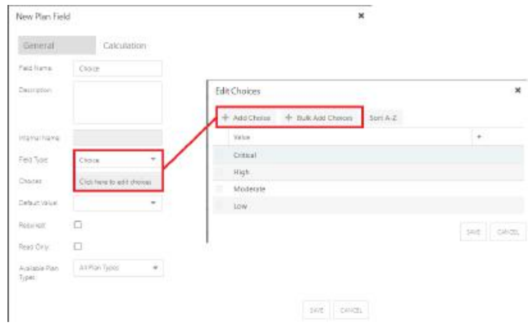
Field Aggregate

Based on the field type selected, the Field Aggregate may show.

- For **date fields**, select No, Min, or Max.
- For **number and currency fields**, select None, Sum, Average, Min or Max.

Choice Fields

You may manually enter each choice field, or bulk upload the choices.

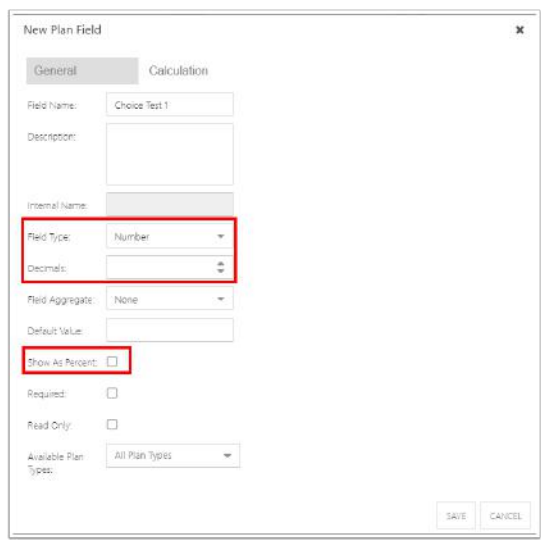


Multi Choice Fields

Multi Choice fields are configured just like regular choice fields. You may manually enter each choice field, or bulk upload the choices.

Number Fields

If the field type is **Number**, you may specify the number of decimal places allowed (between 0-5) and whether to show the number as a percent.

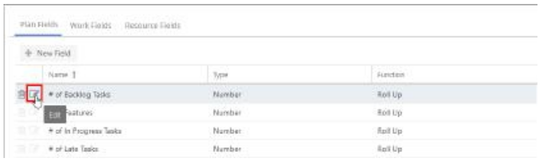


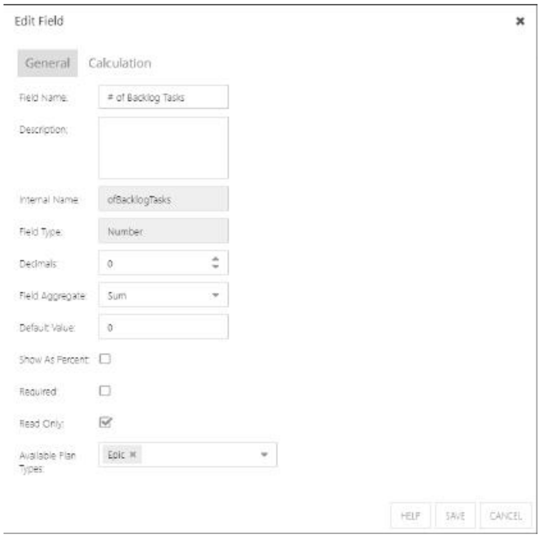
Update a Plan Field

NOTE

The field type cannot be edited after a field is created.

1. Click the **Edit** icon next to the plan field you would like to update. The **Edit Field** form will open.
2. Complete the **Edit Field** form.
3. Once the field updates are complete, click **Save**.



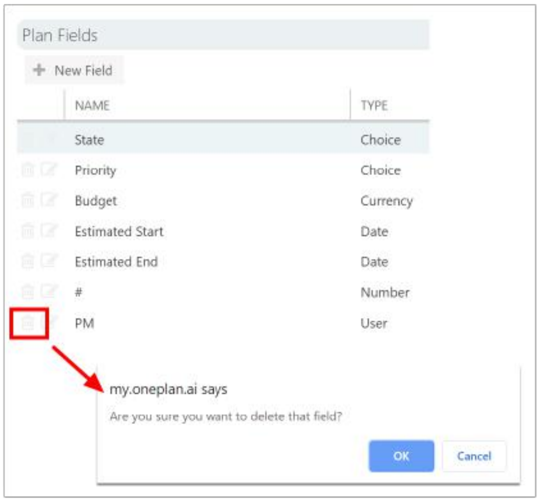


Delete a Plan Field

WARNING

If you delete a field, any data entered in that field will also be deleted. So, be sure you are certain you want to delete it before you delete a field.

Click the Delete trash can icon to delete a field. Confirm deletion.



Create and Manage Work Fields

This article explains how to create and manage work fields in OnePlan. Work fields are the main fields where you enter metadata regarding your ongoing work. Work fields show on the Work Plan List and Board views. They also show in the My Work and Timesheet modules.

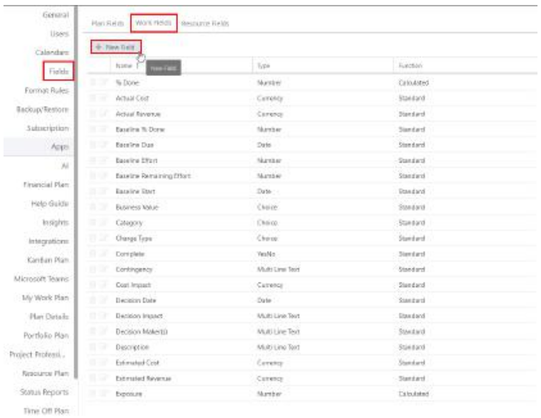
https://player.vimeo.com/video/817397378

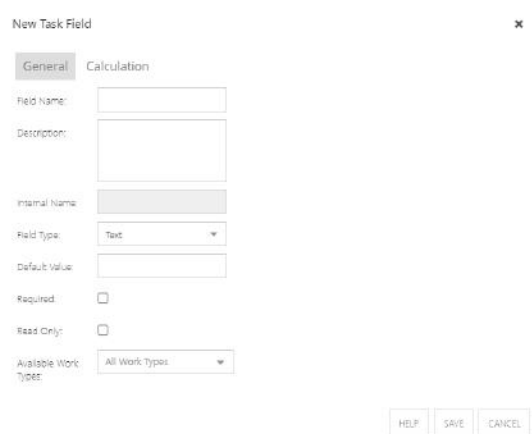
NOTE

Some fields may be created automatically upon installing certain apps. For example, when the Timesheets app, Backlog List app, etc.

Create a New Work Field

1. Go to the Admin pages, and select **Fields** in the navigation. Then, click on the **Work Fields** tab.
2. Click the **New Field** button. The **New Task Field** form will open.





3. Complete the **New Task Field** form.
   a. Complete the **General** tab of the form.
      - **Field Name:** Enter a name for the field.
      - **Description:** Enter a description of the field function, or how the user should interact with the field. This text will appear as a tooltip when a user interacts with the field.
      - **Internal Name:** Will display the internal (back-end) field name when applicable. This field will auto-populate once you save the new field.
      - **Field Type:** Select the field type. See Work Field Types [47] for more details.
      - **Default Value:** Enter a default value if applicable.
      - **Required:** Check the check box if the field is required.
      - **Read Only:** Check the check box if the field is read-only.
      - **Available Work Types:** Select one or more work types where the field is available. If no work type is selected, the field will be available for all plan types.
   b. (Optional) If you would like the new plan field to be a calculated field, complete the **Calculation** tab of the form. See Manage Field Calculations for instructions on configuring field calculations.
4. Once the field configuration is complete, click **Save**.

Work Field Types

- **Text:** Users can enter one line of free form text.
- **Date:** Users can select a date from a calendar pop up.
- **Number:** Users can enter a numeric value. The admin can set how many decimal places are allowed. See Number Fields for more detail.
- **Currency:** Select a currency. The admin can set up multiple currencies if your organization works cross-nationally. To configure currencies and exchange rates, see What are the advanced Financial Plan settings? [74]
- **YesNo:** Users can check a check box to indicate Yes or No.
- **Choice:** Enter choices. See Choice Fields for more detail.
- **User:** People picker field, tied to user accounts
- **Multi Choice**: Multi Choice fields allow users to select multiple options from the choice options available.
- **Multi Line Text:** Users can enter multiple lines of free text.
- **Hyperlink**: Users can insert a hyperlink to easily access resources from the internet.

For additional details about the Lookup fields types, refer to the article: How do I configure lookup fields?

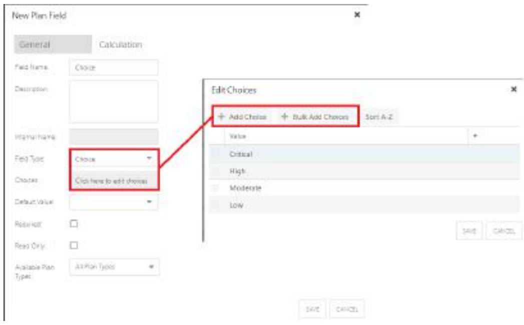
Field Aggregate

Based on the field type selected, the Field Aggregate may show.

- For **date fields**, select No, Min, or Max.
- For **number and currency fields**, select None, Sum, Average, Min or Max.

Choice Fields

You may manually enter each choice field, or bulk upload the choices.

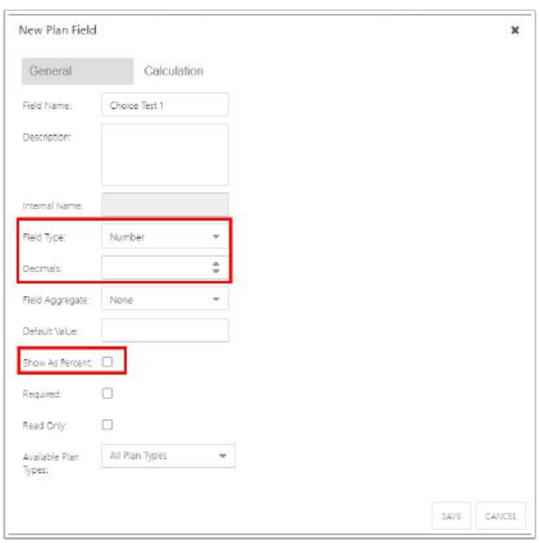


Multi Choice Fields

Multi Choice fields are configured just like regular choice fields. You may manually enter each choice field, or bulk upload the choices.

Number Fields

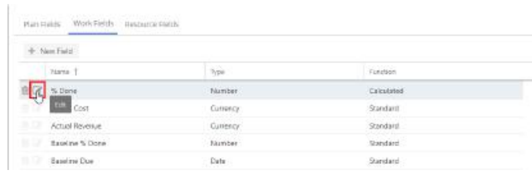
If the field type is **Number**, you may specify the number of decimal places allowed (between 0-5) and whether to show the number as a percent.

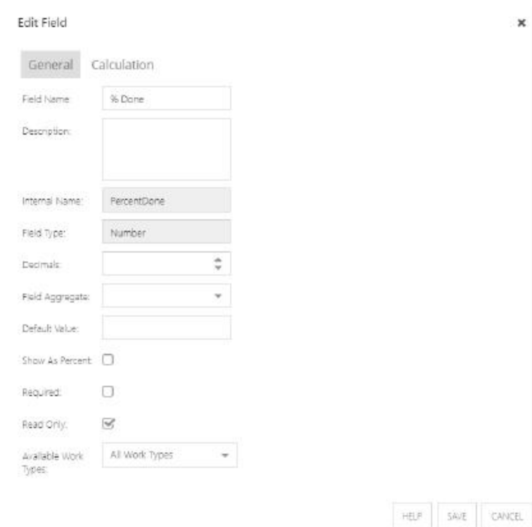


Update a Work Field

NOTE
The field type cannot be edited after a field is created.

1. Click the **Edit** icon next to the plan field you would like to update. The **Edit Field** form will open.
2. Complete the **Edit Field** form.
3. Once the field updates are complete, click **Save**.

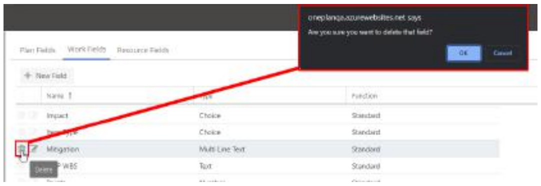




Delete a Work Field

WARNING
If you delete a field, any data entered in that field will also be deleted. So, be sure you are certain you want to delete it before you delete a field.

Click the **Delete** icon to next to the field you would like to delete. Then confirm deletion.



Create and Manage Resource Fields and Team Fields

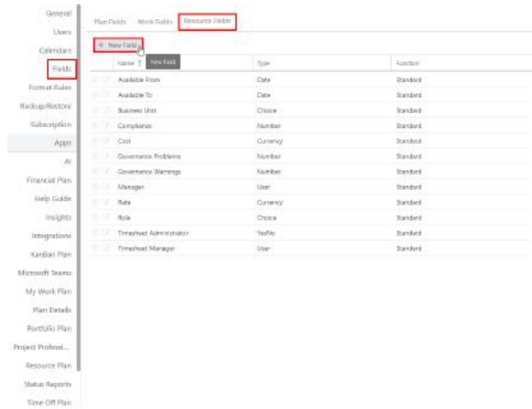
This article explains how to create and manage resource and team fields in OnePlan. Resource fields and team fields are the main fields where you enter metadata regarding resources in your OnePlan resource pool. Resource fields show on the resource form, and team fields show on the team form. Both filed types are used in the Plan-level and Global Resource Plans.

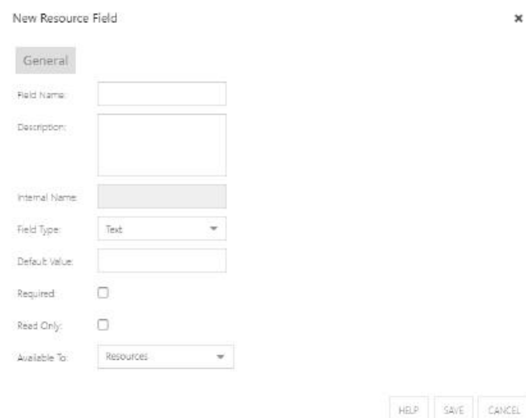
https://player.vimeo.com/video/817397378

> **NOTE**
>
> Some fields may be created automatically upon installing certain apps. For example, when the Timesheets app, Backlog List app, etc.

Create a New Resource or Team Field

1. Go to the Admin pages, and select **Fields** in the navigation. Then, click on the **Resource Fields** tab.
2. Click the **New Field** button. The **New Resource Field** form will open.





3. Complete the **New Resource Field** form.
   - Complete the **General** tab of the form.
     - **Field Name:** Enter a name for the field.
     - **Description:** Enter a description of the field function, or how the user should interact with the field. This text will appear as a tooltip when a user interacts with the field.
     - **Internal Name:** Will display the internal (back-end) field name when applicable. This field will auto-populate once you save the new field.
     - **Field Type:** Select the field type. See ??? for more details.
     - **Default Value:** Enter a default value if applicable.
     - **Required:** Check the check box if the field is required.
     - **Read Only:** Check the check box if the field is read-only.
     - **Available To:** Select whether the new field will be a resource field or a team

field. By default, the field will be a resource filed,

4. Once the field configuration is complete, click **Save**.

Resource and Team Field Types

- **Text:** Users can enter one line of free form text.
- **Date:** Users can select a date from a calendar pop up.
- **Number:** Users can enter a numeric value. The admin can set how many decimal places are allowed. See Number Fields for more detail.
- **Currency:** Select a currency. The admin can set up multiple currencies if your organization works cross-nationally. To configure currencies and exchange rates, see What are the advanced Financial Plan settings? [74]
- **YesNo:** Users can check a check box to indicate Yes or No.
- **Choice:** Enter choices. See Choice Fields for more detail.
- **User:** People picker field, tied to user accounts
- **Multi Choice**: Multi Choice fields allow users to select multiple options from the choice options available.

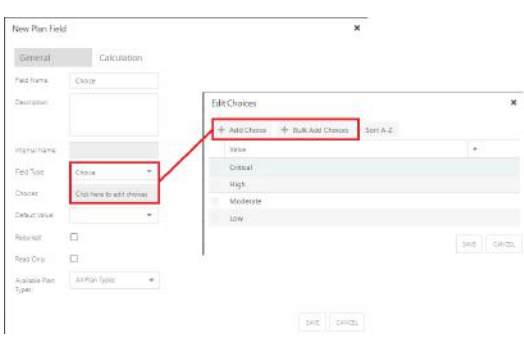
Field Aggregate

Based on the field type selected, the Field Aggregate may show.

- For **date fields**, select No, Min, or Max.
- For **number and currency fields**, select None, Sum, Average, Min or Max.

Choice Fields

You may manually enter each choice field, or bulk upload the choices.

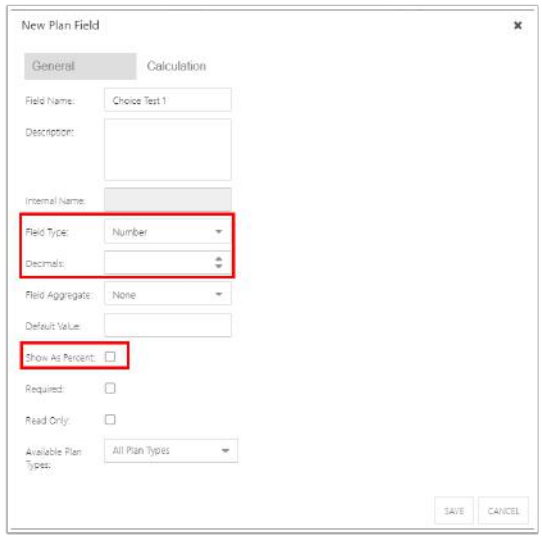


Multi Choice Fields

Multi Choice fields are configured just like regular choice fields. You may manually enter each choice field, or bulk upload the choices.

Number Fields

If the field type is **Number**, you may specify the number of decimal places allowed (between 0-5) and whether to show the number as a percent.

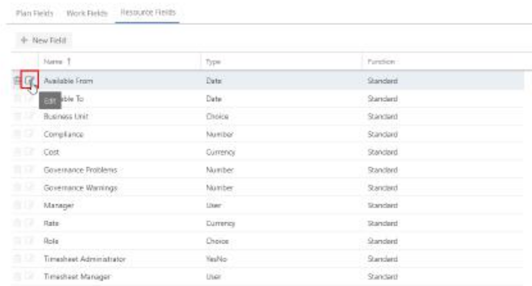


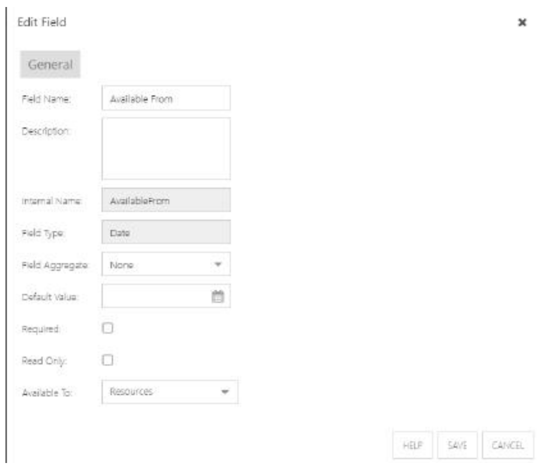
Update a Resource or Team Field

> **NOTE**
> The field type cannot be edited after a field is created.

Certain fields are recommended to configure before use of OnePlan. The Resource fields Department and Role are very important for all the resource planning and labor cost planning features.

1. Click the **Edit** icon next to the plan field you would like to update. The **Edit Field** form will open.
2. Complete the **Edit Field** form.
3. Once the field updates are complete, click **Save**.

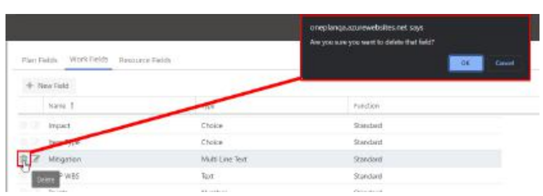




Delete a Resource Field

> **WARNING**
>
> If you delete a field, any data entered in that field will also be deleted. So, be sure you are certain you want to delete it before you delete a field.

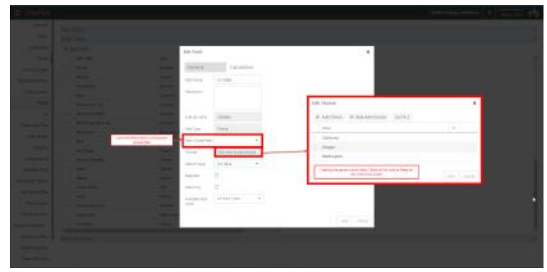
Click the **Delete** icon to next to the field you would like to delete. Then confirm deletion.



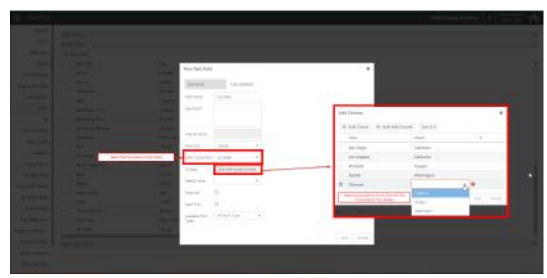
Create Cascading Choice Fields

To configure cascading choice fields:

1. Create the parent / filtering choice field that will be used to filter the choices in the second / child choice field. You may manually enter each choice field, or bulk add the choices. Leave Filter Choice Field blank.



2. Create the next **Choice Field** that will use the **Filter Choice Field**.
   a. Select the choice field that you just configured in the **Filter Choice Field** drop-down.
   b. Create the choices for the field. You will need to map the choices to their parents from the initial choice field.



Estimated Start and Estimated End Field Functionality

This article explains how the plan level fields **Estimated Start** and **Estimated End** fields function.

The **Estimated Start** and **Estimated End** fields are located in the Plan Details of a given plan, and are directly related to the **Start** and **Due** date fields in the plan's Work Plan.

Estimated Start

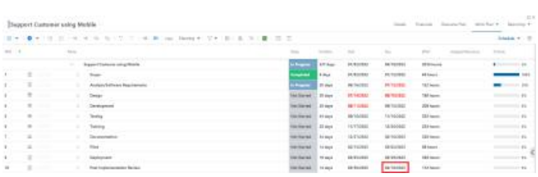
Estimated Start = the earliest **Start** date in the schedule, or the **Plan Start Date**.

You can set a date in the **Estimated Start** field in the Plan Details form, which will set both the first **Start** date field in the work plan, and **Plan Start Date**.

Or, you can set the **Plan Start Date**, which will drive the **Start** field in the Work Plan, and **Estimated Start** field in the Plan Details.

Estimated End

Estimated End = the latest **Due** date / scheduled **Due** date calculated in the work plan.



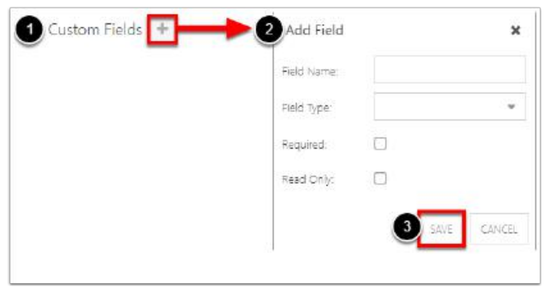
Resource Plan Custom Fields Settings

On the Resource Plan settings page, expand the **Custom Fields** topic heading.

Use this feature to create custom fields in the Resource plan.

Add a Custom Field

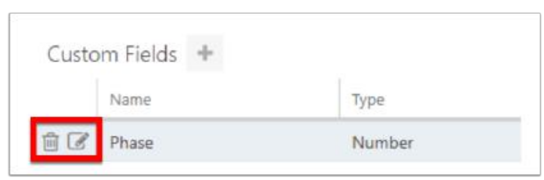
1. Click the Add Custom Field (+) button.
2. Complete the Add Field form.
   - **Field Name:** Enter the name of the field.
   - **Field Type:** Select the type of field - Text, Date, Number, Currency, Yes/No, Choice, User
   - **Required:** Select the check box to make the field required.
   - **Read Only:** Select the check box to make the field read only.
3. Click **SAVE.**



Manage Custom Fields

Edit - Open the Field form to edit the settings for the field.

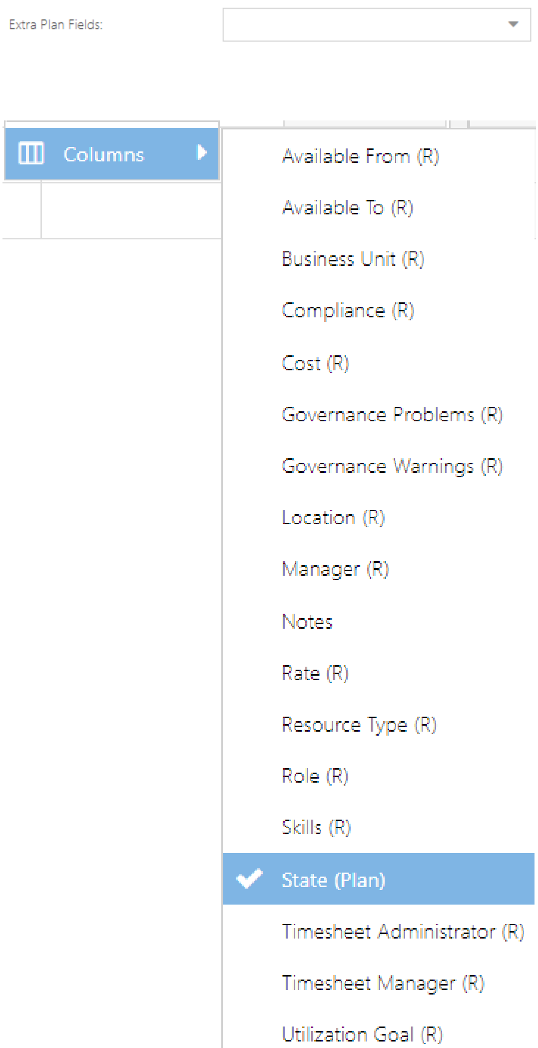
Delete - Delete the field.



Select Plan-Level Fields

Plan level fields are available to be viewed, filtered, and sorted in the resource planner. This allows users to view data regarding a given plan without having to open up Plan Details or go to the plan itself. For example, you may want to allow the plan State field to display in the resource plan.

Select the desired plan-level fields from the **Extra Plan Fields** drop down. These fields will be available for users to add into their resource plan views.



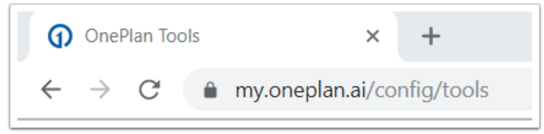
How do I add the Default Task Type field?

This article explains how to add the Default Task Type field to your OnePlan group. The Default Task Type is also referred to as "Scheduling Mode."

In certain OnePlan groups, the default task type field is already available. The steps in this article are for older groups that don't have the field by default. When the Default Task Type field is there, it works according to What is Scheduling Mode?

Navigate to the Admin Tools Page

As an admin, navigate to the following URL to get to the back-end tools page: my.oneplan.ai/config/tools.

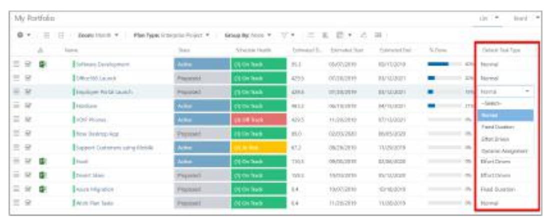


Run Tool

Click the Run Tool button for Add Task Type Field. This will add a plan-level field called Default Task Type to your OnePlan group.

Field Added

The plan-level field is added. You may now view it in the Portfolios views and or add the field to the Plan Details Form for your plans.



How do I manage baseline fields?

This article explains how to create baseline fields, which are used in the Work Plan Grid for scheduling work items. By default, there may be no baseline fields in your OnePlan group. You need to create the baseline fields. Then, when a user saves a baseline of their work plan, the system looks for any baseline fields (based on the logic explained in this article) to copy into the baseline fields.

Go to the Admin pages, select Fields in the navigation. Then, expand the Work Fields topic heading.

The ability to save baselines requires the *Advanced Plan* app be installed in your OnePlan group.

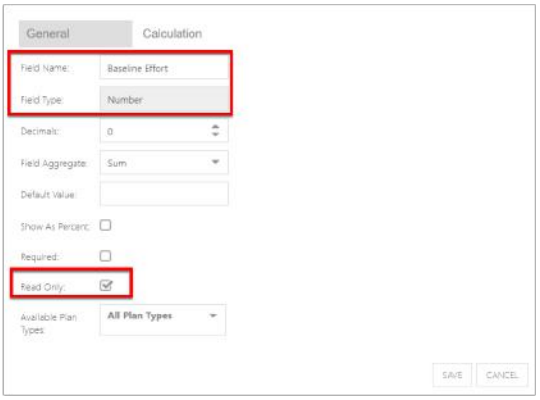
Create Baseline Fields

Create any baseline fields applicable to your organization.

- **Field Name:** Name your field according to the following formula: "Baseline Field" for whichever field you want. If you want the Effort field to have a baseline value, you would create "Baseline Effort."
- **Field Type:** Select the same type as the main planning field (if Actual Start field is a date field, then Baseline Actual Start should be a date too).
- **Read Only:** Check the box, as users should not be manually entering values into baseline fields. The system should auto-populate the fields.
- Make the rest of your field settings selections as needed.

There are two exceptions to the formula logic above. They are for the Start & Due fields. Use the following for these two fields:

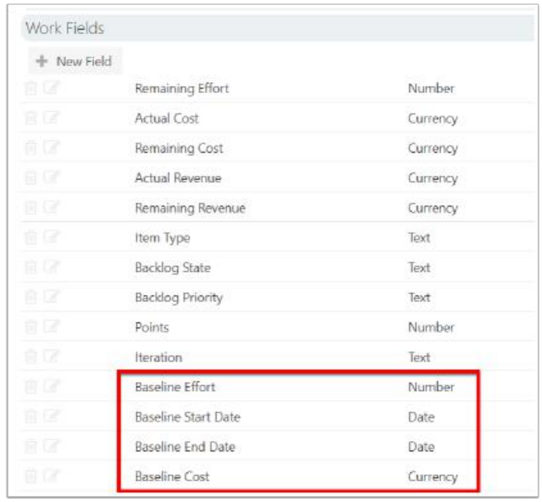
- Baseline Start Date (for the Start field)
- Baseline End Date (for the Due field)



Common Baseline Examples

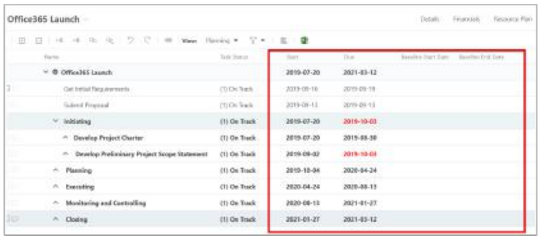
Though you can create baseline fields for any fields in the Work Fields list, here are some common fields for scheduling:

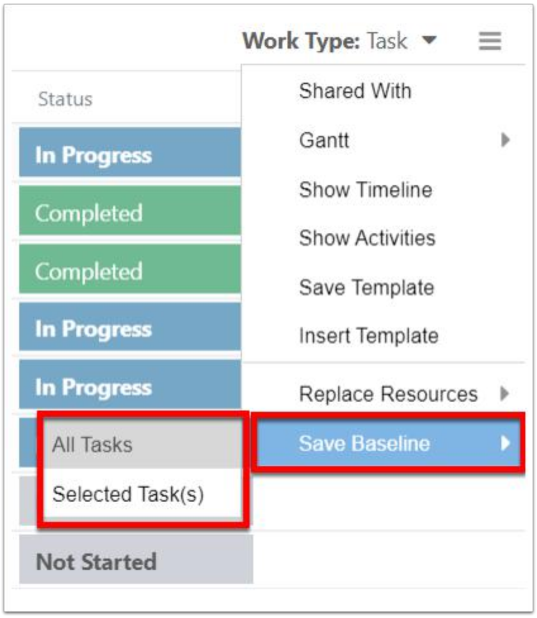
- Baseline Start Date (for the Start field)
- Baseline End Date (for the Due field)
- Baseline Effort (for the Effort field)
- Baseline Work (for the Work field)
- Baseline Duration (for the Duration field)
- Baseline Cost (for the Cost field)
- Baseline Actual Start (for the Actual Start field)
- Baseline Actual Finish (for the Actual Finish field)
- Baseline Actual Cost (for the Actual Cost field)
- Etc.

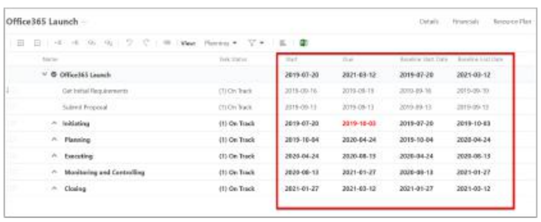


How Baseline Values Get Populated

When the user is looking at the Work Plan Grid, there is an option to Save Baseline. The system looks for any fields beginning with the word "baseline" from the Fields settings page and copies the value of the matching field name into the baseline field. Then, the regular fields can be updated, but the baseline fields don't change unless/until Save Baseline is done again.







How do I configure lookup fields?

This article explains how to manage the Lookup and Multi Lookup fields.

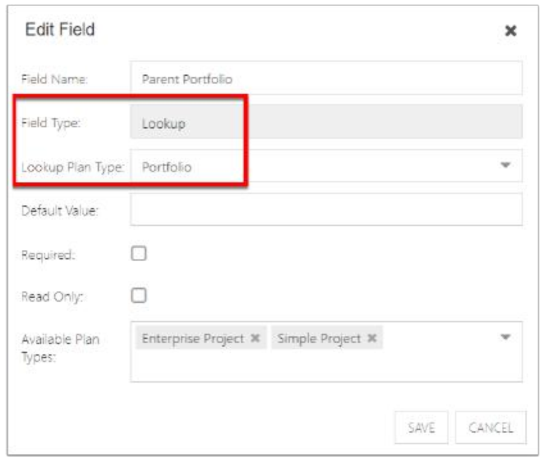
What are Lookup Fields?

There are two field types available for creating new fields: **Lookup** & **Multi Lookup**. Lookup fields are valuable for creating relationships between plans in the system. If the plan types are set up in a flat hierarchy, use lookup and multi lookup fields to create the parent to child relationships. If the plan types are set up in a hierarchy, lookup fields automatically get created and populated with the parent value for the children plans. Views can be grouped and filtered by the lookup fields. Ex: A plan can have a lookup to the program-type plan(s) to which it's associated. Or, a feature-type plan can have a lookup to the epic-type plan(s) to which it's associated.

Create New Lookup Field

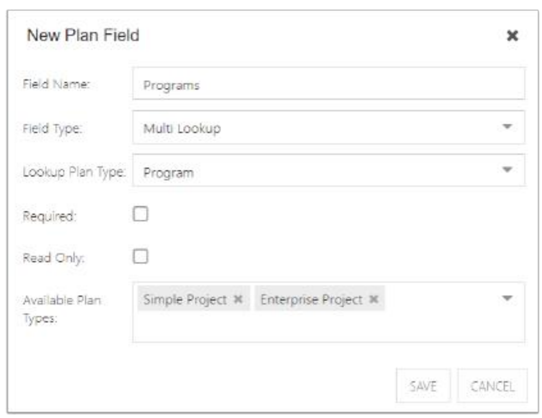
Follow the steps to create a new plan-level field. For more information, refer to Create and Edit Plan Fields [44].

- Field Type: Select Lookup or Multi Lookup.
- Lookup Plan Type: Select from which plan type the users will select the lookup field.



Multi Lookup Scenario

Multi Lookup fields are good for noting linking multiple other plans.



Enter Prioritization Fields

For purpose of doing prioritization and analysis, be sure to complete the prioritization fields for your idea.

If the project is a Standard project the Prioritization fields are on the left. If the project is going to be an Agile project the Agile fields on the right.

View field internal names

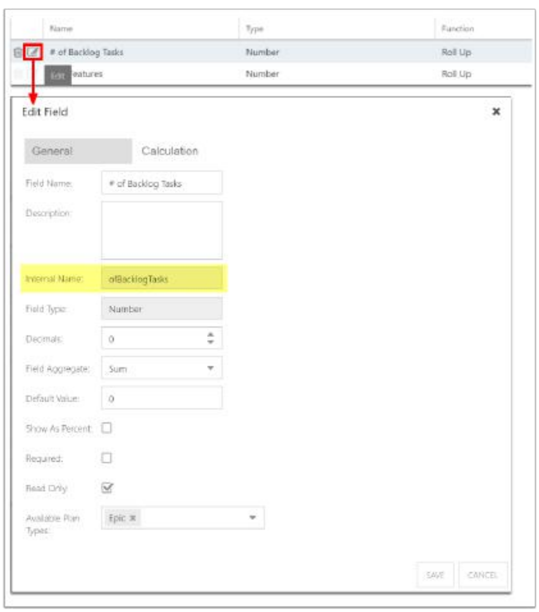
This article explains how to view field internal names.

Go to the **Admin pages > Fields.** Then expand the desired field type heading (**Plan Fields**, **Work Fields**, or **Resource Fields**).

View field internal names

To view the internal names for Plan, Work, and Resource fields:

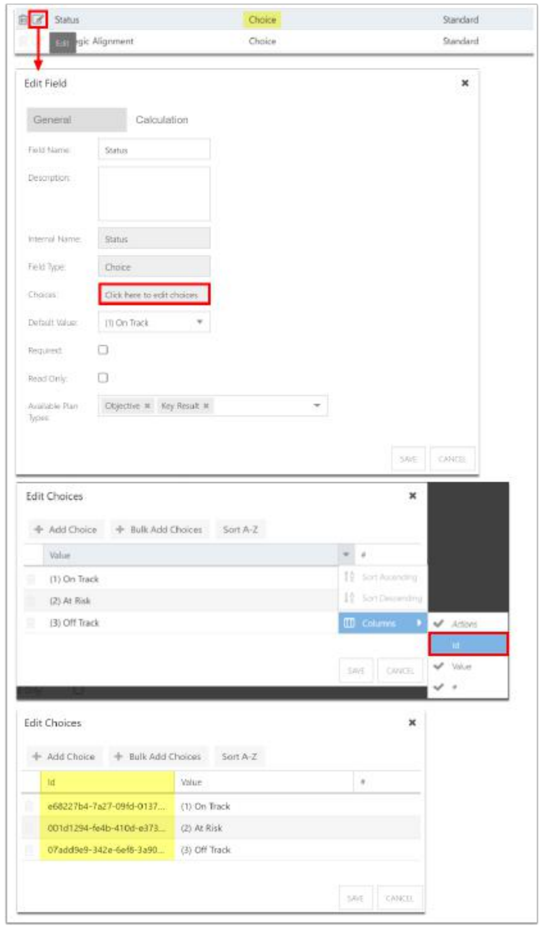
Click the **Edit** icon next to the desired field. The **Edit Field** form will open. The field's internal name is displayed in the **Internal Name** field.



View Choice internal names

To view the internal names for each Choice in a Choice field:

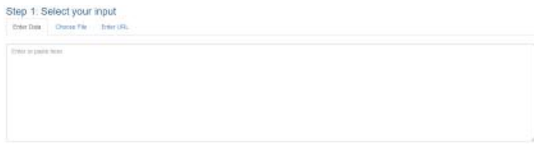
1. Click the **Edit** icon next to the desired field. The **Edit Field** form will open.
2. Click the **Choices** field. The **Edit Choices** form will open.
3. Add the **id** column to the form. The **id** column displays the internal names of the choices.



Export Work Plan Fields to Excel

This article explains how to export all of the work plan fields in your environment into an Excel spreadsheet. The Excel sheet will include all the fields and their choices, states, etc.

1. Go to my.oneplan.ai/api/workplan/fields.
2. Copy the result copy the resulting JSON.
3. Go to https://www.convertcsv.com/json-to-csv.htm.
4. Paste your JSON from step 2 into the **Enter Data** tab of the **Step 1: Select your input** form.



5. Configure your output settings in the **Step 2: Choose output options** form.
    - **Output field separator**: select "**,**" (comma)
    - Check the **Include header in first row** checkbox
    - Check the **Still not happy - try an alternative conversion** checkbox

6. Under **Step 3: Generate output**, click **JSON to Excel**. An Excel file will generate.

Calculations Settings

Manage Field Calculations

This article explains how to create and manage field calculations in OnePlan. These settings are available when the Advanced Settings are enabled.

Go to the **Admin** pages, select **Fields** in the navigation.

You need to create a calculation for each scenario or value of a field that is part of that rule. For example, for a field to be set to true or false, create two calculations - one for when value should be set to True, and create one for when value should be set to False.

Many calculations have already been configured in OnePlan. For example, when the task **% Complete** field value is set to 100% or the **Complete** flag is set to true/checked, the **Status** field is updated to **Completed.** The reversed logic is also set as a calculation; when the **Status** field value is set to **Completed**, the **% Complete** field is updated to 100%.

NOTE

You cannot create calculations with other calculated fields. The calculation will not update and your information will be incorrect. You must use the initial field values to create all calculations.

Add a Calculation

1. Go to the desired plan field under the **Plan Fields** topic heading, or work field under the **Work Fields** topic heading. Click the Edit icon next to the field you would like to add a calculation to. The **Edit Field** form will open.

NOTE

You can also create a new field and add a calculation. See How do I manage fields? [44] to create a new field, then proceed with the rest of the procedure.

2. Select the **Calculations** heading in the **Edit Field** form.
3. Select **Calculated** in the **Calculation Type** drop down.
4. Click **Add Calculation**. The **Edit Calculation** form will open.
5. Complete the **Edit Calculation** form.
   - **Select Field To Add:** Select the a field you would like to use in your calculation. The selected field will populate the Calculation field below.

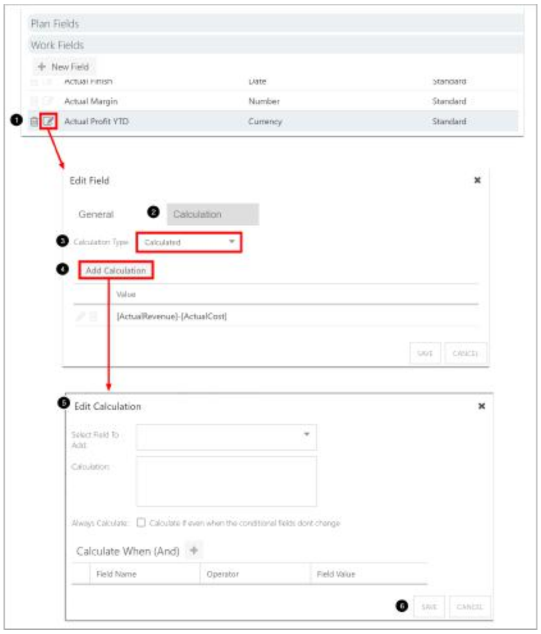
     NOTE

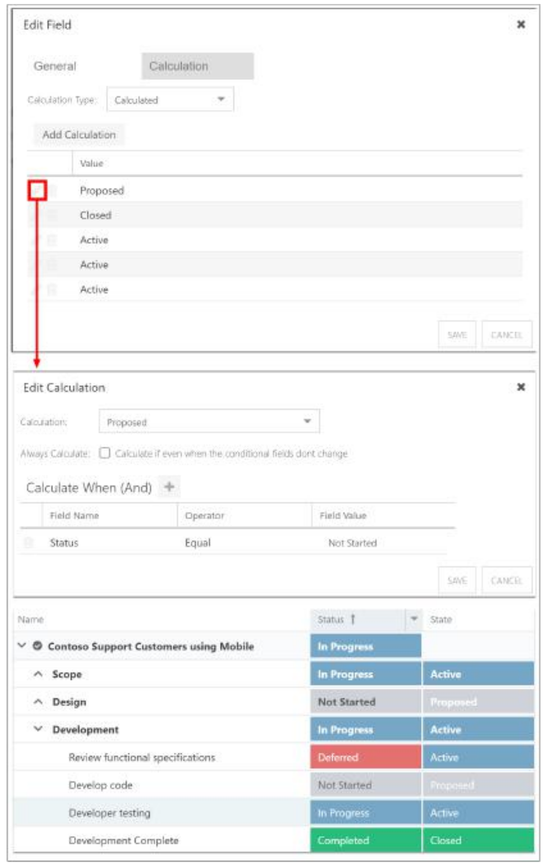
     Do not select a calculated field. You cannot create calculations with other calculated fields. The calculation will not update and your information will be incorrect.

   - **Calculation:** Build your calculation in the field. Use selected fields, or enter values.
     Available calculations include:
     - Basic math (addition, subtraction, multiplication, division).
     - `DATEDIFF([field 1], [field 2])`. This function calculates the difference between two date fields.
     - `[AssignmentCost]`. This function multiplies effort by cost using your organization's rate tables.
     - `[AssignmentRevenue]`. This function multiplies effort by revenue using your organization's rate tables.

- **Always Calculate:** Check the check box if you want the calculation to run even when the conditional fields do not change.
- **Calculate When (And):** Add one or more rules/logic for the calculation.

6. Click **SAVE**.





Calculation Example

In this example, we will look at the **State** task field.

There are three states that a task can be in: Proposed, Active, and Closed. Each of these states has its own calculation(s):

- **Proposed:** When the **Status** field is set to "Not Started".
- **Active:** When the **Status** field is set to "In Progress", "Deferred", or "Waiting for someone else".
- **Closed:** When the **Status** field is set to "Completed".

In the project Work Planner, when a task status is set to "In Progress", for example, the **State** field will update to "Active" based on the calculation for that field.

Add a Rollup

Rollups are another form of a field calculation that calculate and display aggregate values from the work items (i.e. Tasks, Issues, Backlog, etc.) at the parent plan level. Rollups are configured at the plan level, with various options for how the values are aggregated and filtered. For example, count of active issues, sum of task effort (hours), sum of backlog remaining hours, etc.

When configured, the rollups auto-calculate on a scheduled basis across the system. Additionally, they can be recalculated on-demand using the Calculate Rollups button on the Plan Details form. See Schedule Automatic Field Rollups.

To add a rollup calculation to a field:

1. Go to the desired plan field under the **Plan Fields** topic heading. Click the **Edit** icon next to the field you would like to add a calculation to. The **Edit Field** form will open.

NOTE

You can also create a new field and add a calculation. See Create and edit fields [44] to create a new field, then proceed with the rest of the procedure.

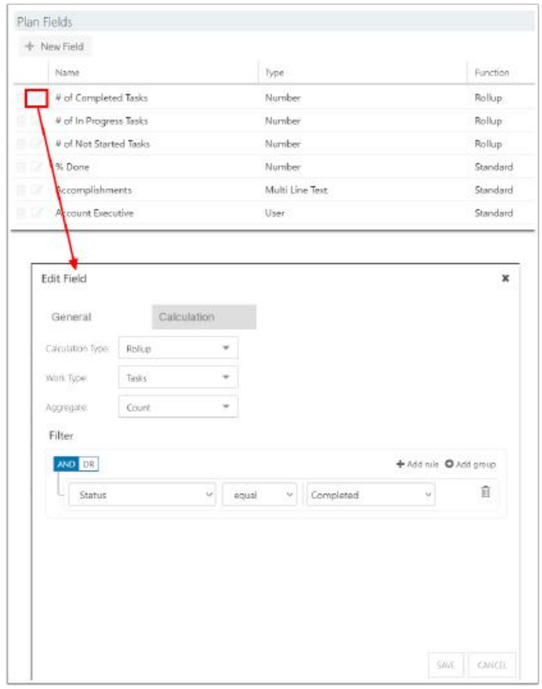
NOTE

Rollup calculations are only available for **Number**, **Currency**, and **Date** field types. Ensure one of these field types is set for the **Field Type** field.

2. Select the **Calculations** heading in the **Edit Field** form.
3. Select **Rollup** in the **Calculation Type** drop down.
4. Complete the **Edit Calculation** form.
   - **Work Type:** Select the work type where the rollup data will come from. You can select Plan to create a rollup field for associated plans.
   - **Lookup Field:***Available when Work Type is set to Plan.* Select the plan field to calculate the rollup.
   - **Aggregate:** Select the aggregate calculation to perform on the rollup data.
   - **Filter:** Add one or more rules/logic for the rollup calculation.
5. Click **SAVE**.

NOTE

Status and **% Done** require a start and due date, or duration, to rollup to the plan level. See Status and % Done [60] for more information.



Status and % Done

Status and **% Done** require a start and due date, or duration, to rollup to the plan level. This is because:

- The **% Done** rollup is weighted by duration. For example, if you have one task that is 5 days long, and another that is 10 days, you get more **% Done** credit for the 10 day task.
- **Status** and **% Done** are connected. Updating **Status** updates **% Done** (for example, a status of In Progress = 50% done, a status of Completed = 100% done). **Status** itself doesn't really rollup, **% Done** rolls up and if **% Done** is greater than 0 then **Status** is updated to **In Progress**; **% Done** is equal to 100 then **Status** is updated to Completed.

Add a Trend

Trends are another type of field calculation that provide an overview of how a project is changing over time. Trend calculation fields in OnePlan display a graphical representation of the underlying trend calculation.

NOTE: Status Reports must be enabled for the field you would like to capture trends for. See Install and schedule Status Reports. [120]

To add a trend calculation to a field:

1. Go to the desired plan field under the **Plan Fields** topic heading. Click the **Edit** icon next to the field you would like to add a calculation to. The **Edit Field** form will open.

   You can also create a new field and add a calculation. See Create and edit fields [44] to create a new field, then proceed with the rest of the procedure.
2. Select the **Calculations** heading in the **Edit Field** form.
3. Select **Trend** in the **Calculation Type** drop down.
4. Complete the **Edit Calculation** form.
   - **Trend Field:** Select the field to capture trend data over time.
5. Click **SAVE**.

Format Rules

How do I manage format coloring settings?

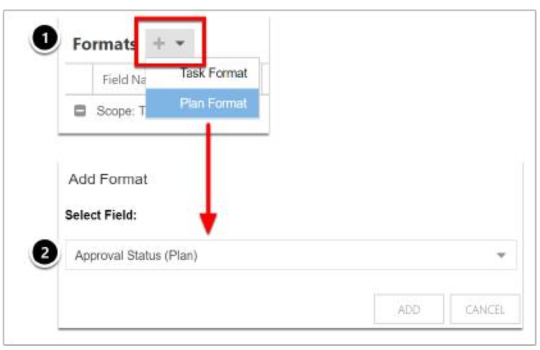
This article explains how to create and manage the formatting rules for colors in OnePlan.

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

You need to create a separate rule for each scenario or value of a field that is part of that rule. For example, for a field with choices A, B, and C, create a rule for when value = A, create a rule when value = B, and create a rule when value = C.

https://player.vimeo.com/video/817335023

Add Format Rule

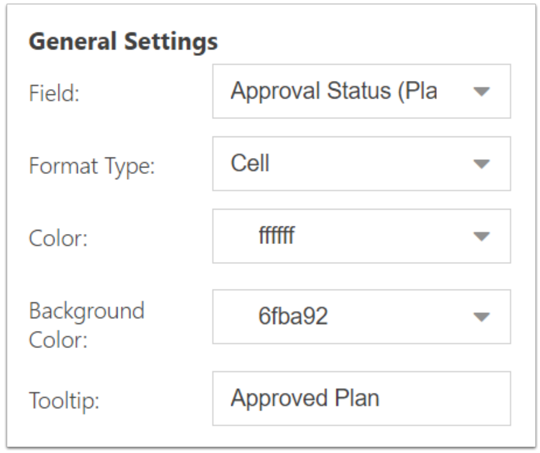


Click the Add drop down menu to add a new format rule.

Select Format

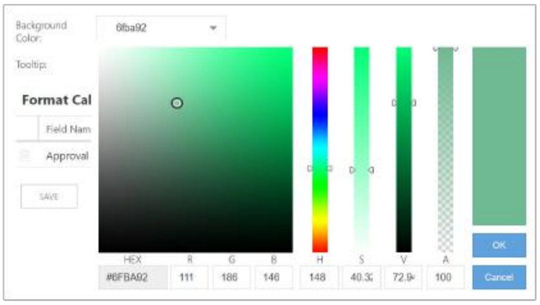
- Task Format - For task-level fields. The formatting shows in the Plan Task Schedule Grid.
- Plan Format - For plan-level fields. The formatting shows in the Portfolio module.

Format Rule General Settings



- Field: select the field to format. The plan-level plans say "(Plan)" after the field name
- Format Type: Select Cell or Row
- Color: Open the color palette selector for the text color
- Background Color: Open the color palette selector for the background color
- Tooltip: Enter the text to show when hovering

Color Palette



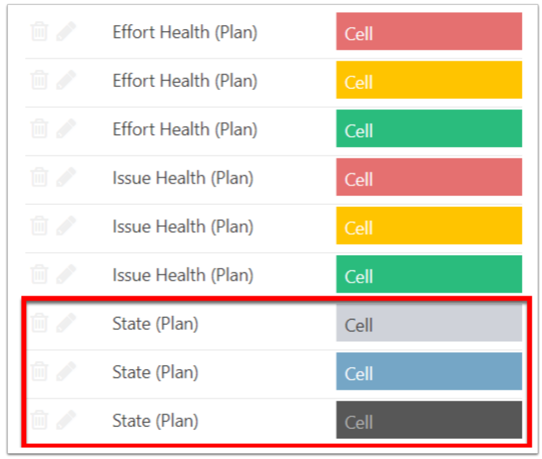
You may select a color by clicking in the main color block, using the slides on the scales, and/or typing directly into the color values for R, G, and B. The HEX code will show based on your selections.

You may also use free online tools for finding the desired HEX color code & corresponding RGB values. Example: www.hexcolortool.com

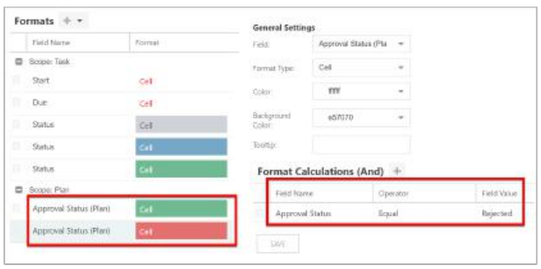
Format Calculations

Add one or more calculation for the format rule. Select the field, operator, and field value for when the Format Rule will apply.

Click the Save button when done.

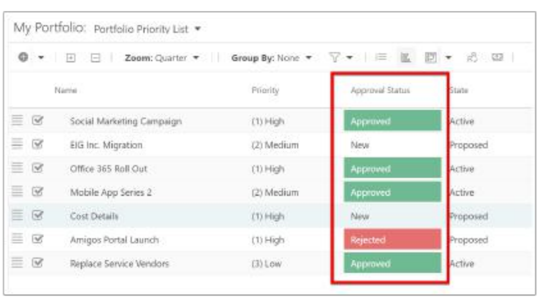


Example Format Rules



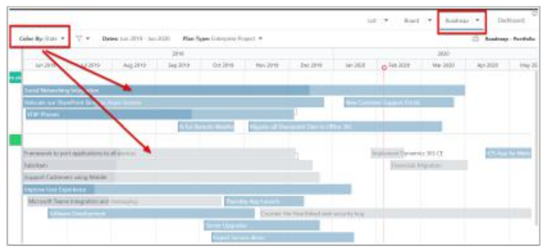
Example Shown in Portfolio List View

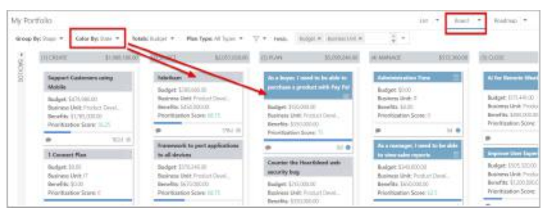
The example highlighted format rules above show the Approval Status cell as green or red, based on the value of the Approval Status plan-level field.



Example Shown in Portfolio Roadmap & Board Views

One the Portfolio Roadmap page, there is a Color By setting. When a field is selected as the color by, there must be format rules to determine the colors of the roadmap bars. If no format rules have been configured, the color by field selected will not result in any specific formatting, and the bars will be white.





Backup OnePlan

OnePlan Backup Options and Best Practices

This article explains your options to backup your OnePlan data, and backup best practices.

About OnePlan Backups

OnePlan is a cloud-based service hosted by Microsoft Azure services (not servers). This means your data is very secure and thoroughly backed up.

For disaster recovery, we have you covered with Microsoft and OnePlan's resiliency measures. See our Business Continuity articles for more information about OnePlan business continuity practices.

For regular, non disaster related backups, users have several options available:

- Users can manually generate backups of their OnePlan group using the OnePlan backup tools.
  - Use the Admin Backup Tool for environments with fewer than 100 plans. See Download and Import OnePlan Backups [65] for instructions to use the backup tool.
  - Use the Backup Utility for environments with 100 or more plans. See Use the OnePlan Backup Utility [67] for instructions to use the backup utility.
- Versioning and Templates in the work plan are methods in OnePlan to backup and save your work plan data, which safeguards you from losing your work.
  - See Grid Options - Versioning for instructions to save and manage versions of your work plan.
  - See Work Plan Templates Overview for instructions to save and manage templates of your work plan.

Backup Best Practices

Check with your IT department to learn about your company's existing backup processes.

Use versioning and templates to regularly safeguard your work plan data.

Backup/Restore Goals

OnePlan backup/restore process is designed to allow customers to backup their group and restore to another group for troubleshooting purposes.

Backup/Restore was **not** intended to be used to revert an existing group to a previous point in time. If data has been lost, you may use the **Import Backup** function to copy over your group to a new site and copy the data back. See Download and Import OnePlan Backups [65] for instructions to use the backup tool.

For a full group recovery the following may need to be done:

1. Create a new blank group
2. Restore your backup to that group
3. Test and verify that all data and information has been restored
4. Delete the old group and notify users of the use of the new group

NOTICE

Note: If OnePlan has been integrated with an external source, further actions must be taken to restore those links

IMPORTANT

The following data is backed up with your individual group backups:

- Resources
- Plans
- Tasks
- Resource Plans
- Financial Plans
- Status Reports
- Dependencies
- Models
- Insights
- Templates

The following data is NOT backed up with your individual group backups at this time:

- Timesheets
- TimeOff Requests
- Rate Tables

Download and Import OnePlan Backups

This article explains how to save and restore backups of your OnePlan group/environment.

IMPORTANT

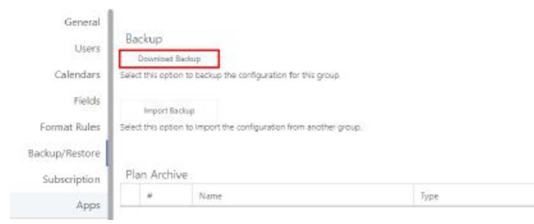
The backup/restore options are **NOT** for purposes of system backups for disaster/data loss recovery. OnePlan automatically does backups, as well as Azure for Office365.

Download Backup

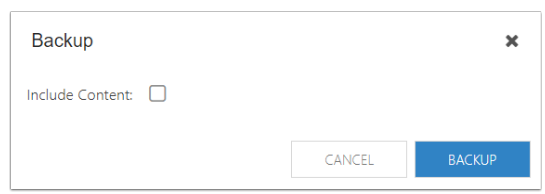
NOTE

The Backup tool in the Admin settings can only backup groups with 100 or fewer plans. If you would like to backup a group with more than 100 plans, see Use the OnePlan Backup Utility [67].

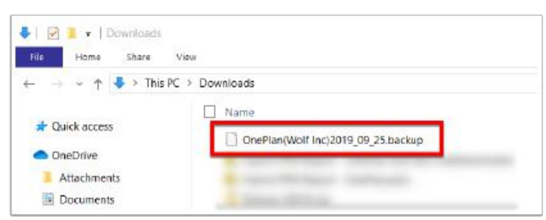
1. Go to the Configuration, then select **Backup/Restore**.



2. Click **Download Backup**. The **Backup** form will open. Select whether or not to **Include Content**. (i.e. Plans, Generic Resources, etc.).



3. Click **Backup**. The backup file will download to your local machine.



Import Backup

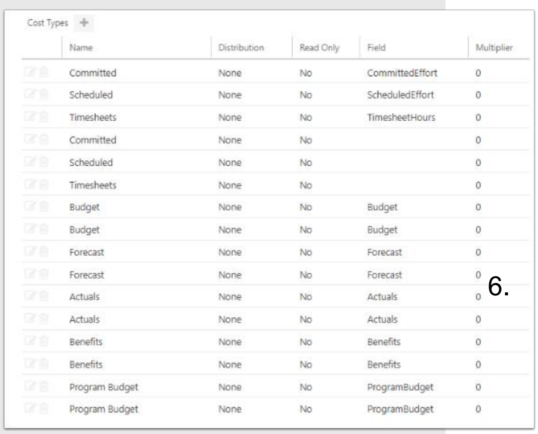
Use **Import Backup** to copy the configuration, settings, and data from one group to another group. You have the option to include content or not.

A scenario when this may be used is for creating a training group and you want to include example training plans and data.

Import Backup appends configurations from your backup onto the second group. This means configurations including fields, cost types, cost categories, and custom fields may be duplicated depending on the configurations of the groups.

NOTE

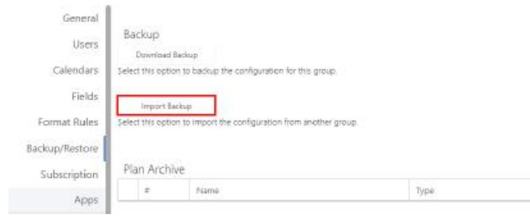
Imports should be done on an **empty** OnePlan group to avoid any potential unwanted configuration or data duplication. If you have a site that already has data, the data will **NOT** be removed during the Import process. This can cause duplication of configuration and data. The image below shows an example of such duplication of Cost Types.



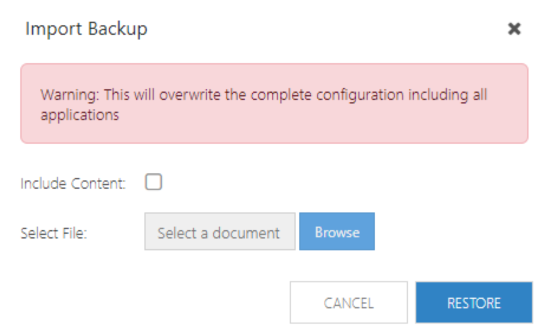
Cost Types

Name	Distribution	Read Only	Field	Multiplier
Committed	None	No	CommittedEffort	0
Scheduled	None	No	ScheduledEffort	0
Timesheets	None	No	TimesheetHours	0
Committed	None	No		0
Scheduled	None	No		0
Timesheets	None	No		0
Budget	None	No	Budget	0
Budget	None	No	Budget	0
Forecast	None	No	Forecast	0
Forecast	None	No	Forecast	0
Actuals	None	No	Actuals	0
Actuals	None	No	Actuals	0
Benefits	None	No	Benefits	0
Benefits	None	No	Benefits	0
Program Budget	None	No	ProgramBudget	0
Program Budget	None	No	ProgramBudget	0

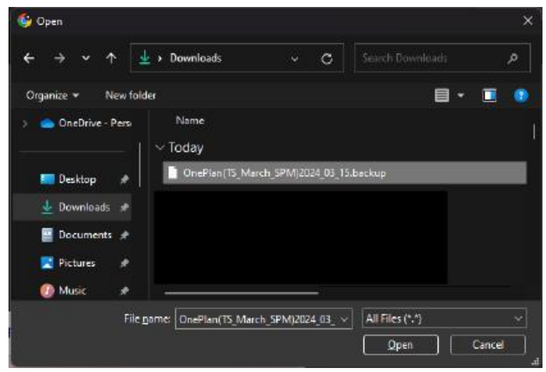
1. Create a backup from the first group.
2. Switch to the second, blank group. Go to the Configuration, then select **Backup/ Restore**.
3. Click **Import Backup**. The **Import Backup** form will open.



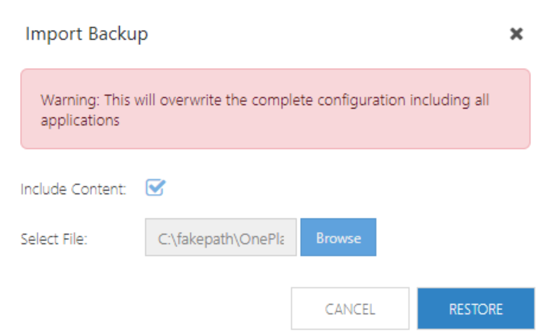
4. Select whether or not to **Include Content** (i.e. Plans, Generic Resources, etc.).



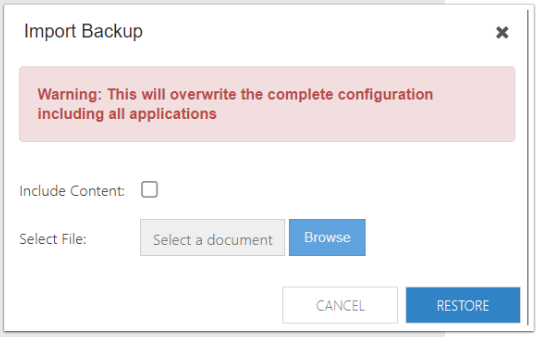
5. Click **Browse**. Browse to the desired backup file on your machine and click **Open**.



6. Click **Restore**.



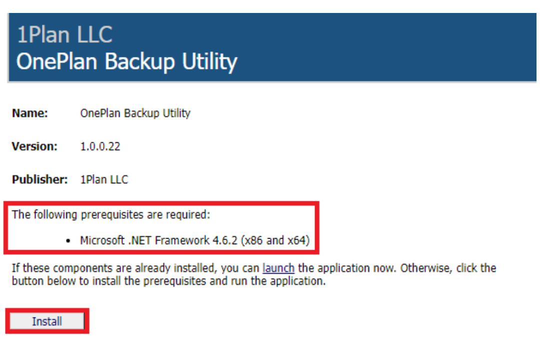
WARNING
The Import function will overwrite the complete configuration including all applications.



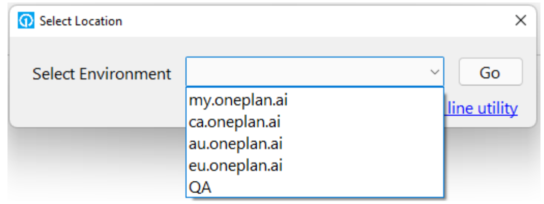
Use the OnePlan Backup Utility

This article explains how to use the OnePlan Backup Utility. This utility should be used to backup OnePlan groups with more than 100 plans.

1. Go to https://oneplantemplates.azurewebsites.net/backuputil/.
2. Review the prerequisites to use the backup utility.
3. Click **Install** to download the utility.



4. Open the **setup.exe** file from your Downloads folder. The OnePlan Backup Utility will install and open on your machine.
5. Select the region where your OnePlan environment is located. Then click **Go**.



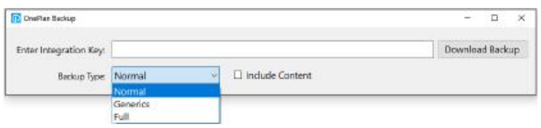
NOTE
Trial environments are hosted in the my.oneplan.ai environment. If you are backing up a trial environment, select my.oneplan.ai.

6. Get an integration key for the group you would like to backup.
   a. In OnePlan, go to **Admin** > **Integration**.
   b. In Authentication Keys, click **New Key**. The **New Key** form will open. In the **New Key** form, give your new key a name and click **ADD**.
   c. Copy the new key and save for later use. The key will be hidden when the page refreshes.

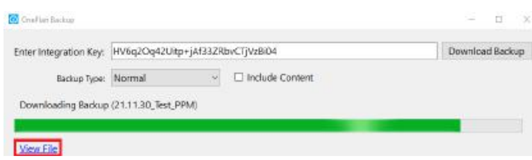
7. In the OnePlan Backup Utility, complete the OnePlan Backup form.
   - **Enter Integration Key:** Paste the integration key for the desired group.
   - **Backup Type:** Select the backup type.
     - **Normal:** Backs up only generics and ignores named users
     - **Generics:** Switches all names resources to generic resources for troubleshooting or templating.
     - **Full:** Backs up all resources as is. Used for tenant migrations or moves within the same tenant.

NOTE
Please contact OnePlan support if you would like to take a Full backup as there are several additional steps required for this backup type.

- **Include Content:** Check the check box if you would like to include content from the group. If unchecked, the backup will just save the group configuration.

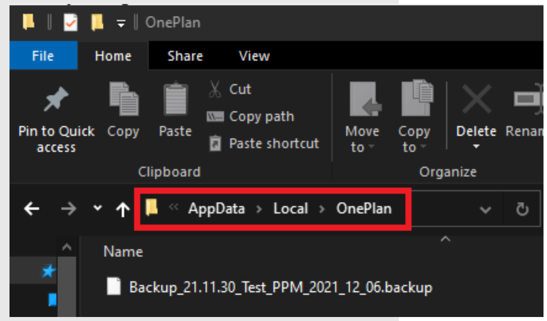


8. Click **Download Backup**. The download is complete when the **View File** link appears. Click **View File** to access your backup file.



NOTE
Even if the download progress bar is not filled, the download is complete once the View File link is visible.

NOTE
The backup utility creates a folder in your machine's **App Data** folder where backup files are downloaded.



Restore archived plans

This article explains how to view and restore archived plans.

Go to the **Admin** pages, then **Backup/Restore**.

1. Locate the plan you would like to restore under the Plan Archive heading.
2. Click the **Restore** icon. The plan will now be available in your OnePlan group.

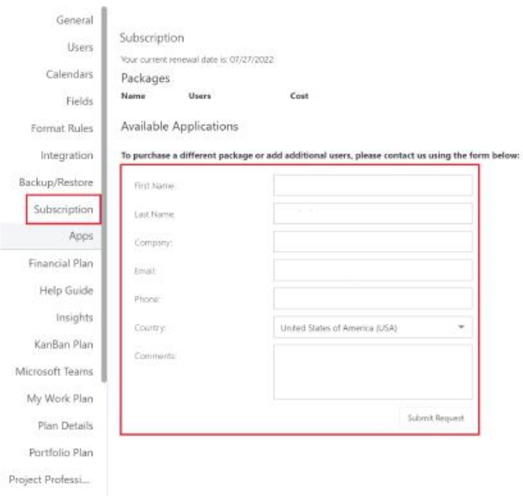
Subscription

Manage your Subscription Settings

This article explains how to activate or extend a OnePlan group.

> **NOTE**
> This procedure requires you to have the advanced admin settings activated. Contact your OnePlan representative if you do not have advanced admin settings.

1. Go to the Admin pages > **Subscription**.
2. Fill out and submit the request form. Include information on which group you would like activated or extended.



Apps

Available Apps in OnePlan

OnePlan is a modular system that allows users to customize their experience based on their organization's needs.

The various modules and add-on functionality that are available to users can be installed into your OnePlan environment via adding and configuring the various OnePlan apps. Your group will likely already have some apps installed as part of your initial OnePlan setup via the OnePlan templates. Each template comes with different apps pre-installed, so be sure to review which apps you have, and what you may want to add.

Permanent OnePlan Apps

There are a few apps that are required for OnePlan to function and cannot be removed including:

- Time off plan
- Notifications
- Plan Details
- Resource Center
- My Work Plan Plus

Beyond these core components, you have the ability to choose the modules that are available in your OnePlan environment.

Add-On OnePlan Apps

Based on your licensing, you may have certain additional apps available to your organization or you may need to pay for apps. If you have any questions about which apps are available to your organization's OnePlan group based on your licensing, contact your OnePlan rep.

NOTE

Some of the apps listed below may not be available to you based on your licensing.

The table below details all the apps (both included and paid) that are available to add or that can be removed from your OnePlan environment:

Name	Description	License Required to Access
Work Plan	Adds the Work Plan module to your plans, which provides a basic grid allowing you to create and manage a basic task list.	Team Member Plus or Enterprise
Advanced Plan	Adds additional features to the Work Plan module including Gantt, WBS support, and activities.	Enterprise
KanBan Plan	Adds a board view for your work plans and the My Work area, allowing you to move your tasks around on an easy-to-use KanBan board.	Enterprise
Financial Plan	Adds the Financials module to your plans, which provides financial planning capabilities for OnePlan.	Enterprise
Resource Plan	Adds the Resource Plan module to your plans, as well as the Global Resource Plan area, which both provide advanced resource capacity planning.Adds the Resource Plan module to your plans, as well as the Global Resource Plan area, which both provide advanced resource capacity planning.	Enterprise
Dashboards	Adds the Dashboard module to your plans, which provides reporting dashboards including charts, tables, and gauges.	Team Member Plus or Enterprise
Backlog List	Adds the backlog module to plans, which provides a list and controls for viewing connected backlogs.	Enterprise

Name	Description	License Required to Access
Status Reports	Adds the Status Report module to plans and the Status Reports area, which provides status reporting and snapshots for plans.	Enterprise
Visualizations	Adds the visualizer module to your OnePlan environment, which provides visualizations of plan dependencies and connections that can be utilized for your plans, and in the Modeler.	Enterprise
Modeler	Adds the Portfolio Modeler module to your OnePlan environment, which supports the collection, prioritization and assessment of all portfolio investments, and the creation and comparison of what-if scenarios.Adds the Portfolio Modeler module to your OnePlan environment, which supports the collection, prioritization and assessment of all portfolio investments, and the creation and comparison of what-if scenarios.	Enterprise
Portfolio Plan	Adds the My Portfolio area to your OnePlan environment. This provides portfolio capabilities for OnePlan where you can view all plans, and group, sort, manage and report on those plans.	Enterprise
Time Plan	Adds the Timesheet module to your OnePlan environment, which provides Timesheet capabilities for OnePlan.	Team Member Plus or Enterprise
Help Guide	Adds the Help Guide area in the left navigation, which provides contextual Help Guide capabilities for OnePlan.	Team Member Plus or Enterprise
Requests	Adds the Requests module to your OnePlan environment, which provides a portal to collect requests for plans from across your organization.	Request App License

Name	Description	License Required to Access
Integrations	Provides Integration Setup, OData, Events	Enterprise
AI	Adds the Sofia GPT AI module to your OnePlan environment, which installs an AI personal assistant developed by OnePlan to assist individuals and businesses in their day-to-day tasks.	Enterprise
Project Professional	Provides ability to connect Project Professional to OnePlan.	Enterprise
Project Online	Provides the ability to connect Project Online to OnePlan.	Enterprise
Microsoft Teams	Provides the ability to connect Microsoft Teams to OnePlan. With the Teams integration, you can create new Teams for specific projects, and more.	Enterprise
Microsoft SharePoint	Provides the ability to connect Microsoft SharePoint Sites to OnePlan.	Enterprise
Insights	Adds the Insights module to OnePlan, which provides configurable, automated insights into plans and work.	Team Member Plus or Enterprise

How do I Add Apps to OnePlan?

This article explains how to add apps. The various modules and add-on functionality are available via adding and configuring the various OnePlan apps. Your group will likely already have some apps installed as part of your OnePlan original setup. Based on your licensing, you may have certain additional apps available to your organization or you may need to pay for apps. If you have any questions about which apps are available to your organization's OnePlan group, contact your OnePlan rep.

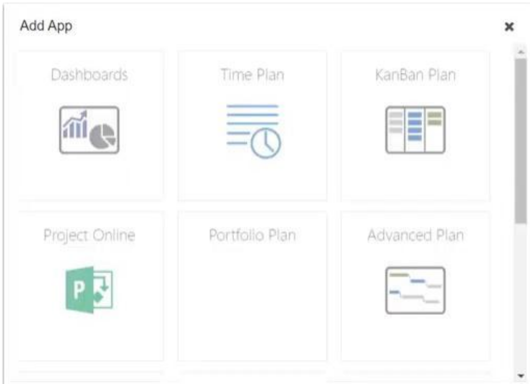
Go to the Admin pages, select Apps in the navigation.

Add an App

Click the [+] Add App icon.

Select the Desired App

Select the desired app to install. Once installed, the settings menu will appear in the navigation of the Admin page.

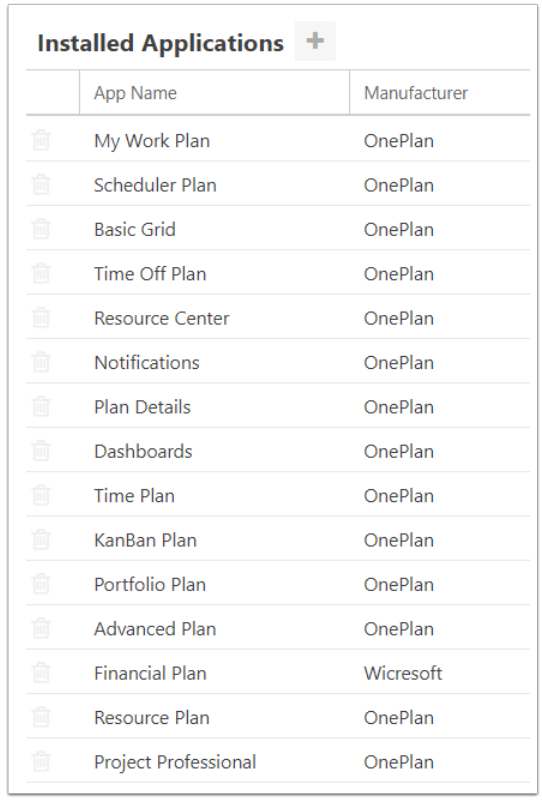


No Additional Apps

You may see the following message: "No additional applications are available." That could mean that based on your licensing level, you may not have access to any more apps. Contact the OnePlan team to request assistance and/or increase your licensing level.

View Installed Applications

View the installed applications. You may delete an app if needed by clicking on the delete icon.



Installed Applications

App Name	Manufacturer
My Work Plan	OnePlan
Scheduler Plan	OnePlan
Basic Grid	OnePlan
Time Off Plan	OnePlan
Resource Center	OnePlan
Notifications	OnePlan
Plan Details	OnePlan
Dashboards	OnePlan
Time Plan	OnePlan
KanBan Plan	OnePlan
Portfolio Plan	OnePlan
Advanced Plan	OnePlan
Financial Plan	Wicresoft
Resource Plan	OnePlan
Project Professional	OnePlan

AI

Setup OnePlan AI (Sofia)

This article explains how to setup the OnePlan AI helper, Sofia. To access the AI settings, go to the OnePlan config pages, and select **AI** from the left navigation.

> **NOTE**
> Both checkboxes need to be checked for Sofia to work properly.

> **IMPORTANT**
> You must install the AI app from the OnePlan Apps module. See How do I Add Apps to OnePlan? [71] for instructions on how to install apps.

To activate AI:

1. Check the **Enable Sofia** checkbox. By checking this box you acknowledge your consent to utilize Sofia for the purpose of providing assistance, and agree to refrain from any misuse or abuse of the chat functionality.
2. Check the **Plan Data Analysis** checkbox. Checking this checkbox means that you consent to your OnePlan data to be sent to Azure Open AI when you request for feedback about your data.

   > **NOTE**
   > Your data will be retained for 30 days for monitoring purposes to prevent abuse incidents, after which it will be deleted. For additional information, please review Data, privacy, and security for Azure OpenAI Service from Microsoft for more information.

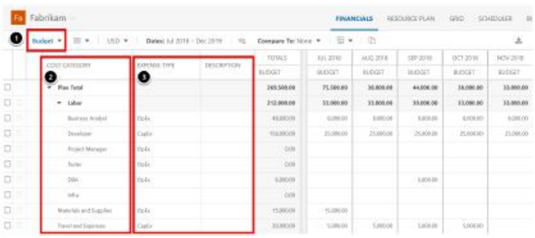
Financial Plan App

Understanding Financial Planning Settings

This article explains the structure and organization of financial planning settings. This requires the app 'Financial Plan' is installed.

Go to the Admin pages, select Financial Plan in the navigation.

Terminology & Use



1. Cost Type - Cost types allow organizations to calculate, evaluate and monitor what financial costs are planned, actually spent, and also financial gains. Users can toggle from one cost type to another. Cost types may be manually entered by users, or the cost values may be auto-entered via integration or importing from elsewhere.
2. 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 are configured per cost type. For labor cost categories, configure the rate table over time per labor cost category.
3. Cost Category Fields - The fields allow cost categories to be further grouped and clarified. Users may add detail rows to cost categories with additional information in the Fields columns.

What are the advanced Financial Plan settings?

This article explains how to the advanced financial planning settings for OnePlan.

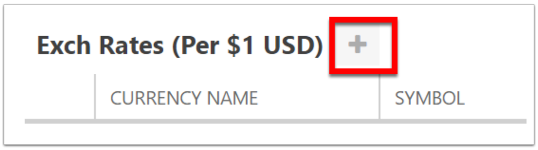
Go to the Admin pages, select Financial Plan in the navigation. Then, expand the Advanced topic heading. These settings are available when the Advanced Settings are enabled.

Advanced Settings

- **Allow Users Submit Rows**: Allow users to submit rows. When selected/checked, users can submit each row in the financial plan. When submitted, there's a flag field indicating so. If the row gets changed post-submittal, it goes back to unsubmitted.
- **Allow Detail Rows**: Allow detail rows. When selected/checked, users can add cost category rows multiple times. For example, if a user would have a cost category of Software, they could add that cost category multiple times and note in the cost category custom fields the type of software in the notes, etc.
- **Allow Plan Level Cost Categories**: Check this box to allow users to add child level cost categories to each plan.
- **Default Currency Name**: You can change / rename the default currency of USD to the default currency of your choice.

Exchange Rates

Click the **New** icon.

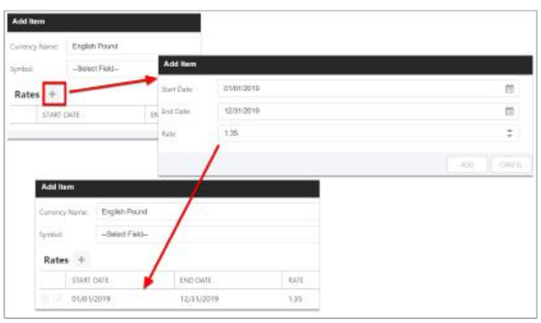


Add exchange rates with the conversion per $1 US Dollar (USD). Enter the dates when that exchange rate is applicable. If the rate won't change, leave the dates blank.

- Click the **New** icon.
- Enter Currency Name.
- Select a symbol, if that exchange rate's symbol is listed. When you select the symbol on the new form, it will show a code, but on the Exchange Rate settings, the actually symbol shows.

Rates Table

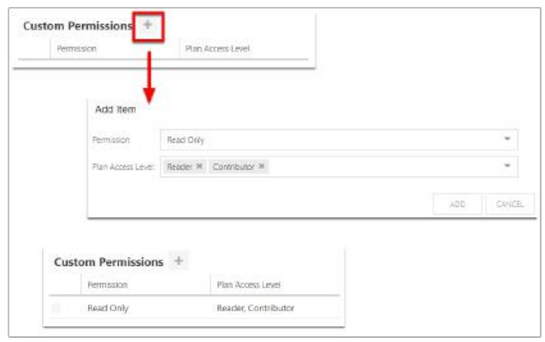
- Click the New icon for the Rates table.
- Enter the **Start** date for the rate, if applicable.
- Enter the **End** date, if applicable. If End Date is left blank, the rate will be set ongoing for all future planning periods (months, years, etc.).
- Enter the hourly **ExchangeRate** value.



Custom Permissions

By default, when a user is added to a plan team, those with Reader access can see all the details of the plan, except for the financial plan. Those with Contributor access can edit the plan details, except for the financial plan, which they can only see/read.

- Click the **New** button.
- Select the permission: either *Read/Write* or *Read Only*.
- Select the plan access level(s): Select *Reader* and/or *Contributor*. If you want the Readers & Contributors to have different access, follow the steps twice.



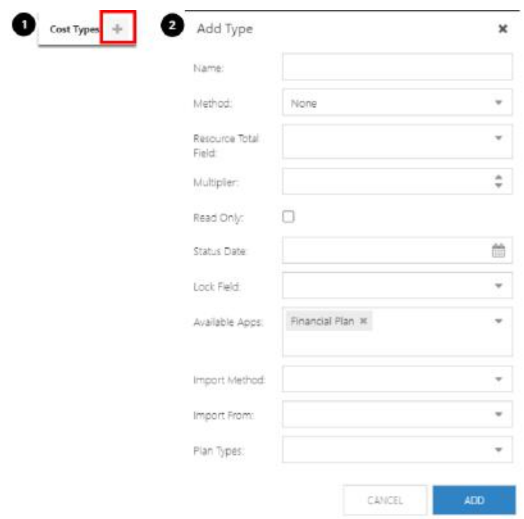
Add a new cost type

1. Click the New Cost Type (+) button.
2. Complete the New Cost Type form.

- **Name**: Enter the name of the cost type.
- **Method**: Select **None**, **Even**, or **Total of Cost Type**.
- **Field**: If a method is selected as **Even** or Total of Cost Type, Field will show. Select the plan-level field to where the total sum value or even distribution from this cost type will populate.
- **Multiplier**: Multiply all values by a common multiple. i.e. “1000” if all values are to be 1000x whatever is entered. So, typing 1000 would really be 1,000,000.
- **Read Only**: Check the check box if data is imported/synced from financial system via integration, or only imported from elsewhere, such as the Resource Plan.
- **Status Date**: As applicable, select a date. All costs prior to and including that date will be locked for editing. For example, if it the end of 2019, and all budgets have been approved

through July 2019, enter 7/31/2020. Everything prior to July will be un-editable. August 2020 forward will still be editable.

- **Lock Field**: Select the applicable plan-level field that will be used for locking the cost type. This setting is used in conjunction with the Calculations settings.
- **Available Apps**: Select whether the cost type should show in the Financial Plan, Resource Plan, or both.
- **Import Method**: Select the cost import method. Options include **Blended Rates** or **Actual Rates**. Blended rates are a standardized rate for a role or business unit. Actual rates are an individual resource's actual rates.
- **Import From:** Select the source for the cost import, if applicable. Typically, the Resource Plan cost types import into the Financial Plan cost types. You may need to create the Resource Plan cost type from which this cost type's data will come. Then, come back in here and select the source cost Import From option.
- **Auto Import:** *Available when **Import From** is set to **Resource Schedule** or **Timesheets**.* Check the check box to auto import the cost type to the set location.
  NOTE: For **Auto Import** to function, you must setup the **Cost Type Import** schedule. See Enable Automatic Cost Imports for instructions.
  NOTE: Selecting Auto Import for a cost type will capture daily Resource Plan data, even if the schedule is set to another time period. This is because the auto import function brings in both resource data tasks. The task related functionality only works when the data is daily. You can bring in other time period data (monthly, for example) by using the **Import** button in the Resource Planner.
- **Plan Types**: Select which plan types will see this cost type on the Financial Planner. Select one or multiple that apply.



Build cost types

This article explains how to create and manage cost types for OnePlan. This requires the app 'Financial Plan' is installed. Before building out cost types, first configure your cost categories. Then, on the Cost Types page, select which cost categories are shown for each Cost Type.

Go to the Admin pages, select Financial Plan in the navigation. Then, expand the Cost Types topic heading.

NOTE: The Cost Types page shows on both the Financial Plan & Resource Plan settings pages, regardless whether some cost types are only for financial or resource planning (or both).

What are Cost Types? Cost types allow organizations to calculate, evaluate and monitor what financial costs are planned, actually spent, and also financial gains.

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, for reference.

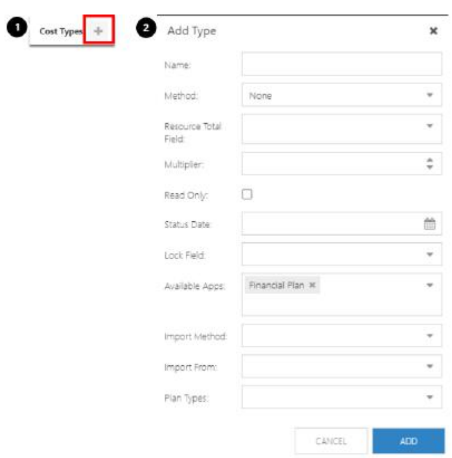
- A Budget is the initial plan for what is estimated to be spent on this initiative. Expected costs are entered into cost categories. A cost category is how costs or gains are broken out into smaller defined categories. These are often organized as whether they are labor costs, and also whether they 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 financial spend.

Add a new cost type

1. Click the New Cost Type (+) button.
2. Complete the New Cost Type form.

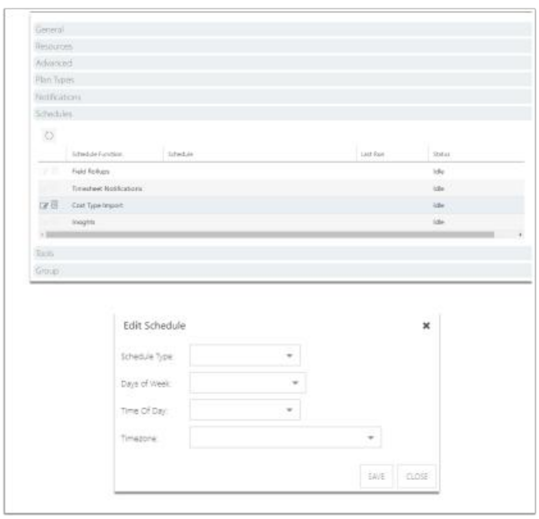
- **Name**: Enter the name of the cost type.
- **Method**: Select **None**, **Even**, or **TotalofCostType**.
- **Field**: If a method is selected as **Even** or Total of Cost Type, Field will show. Select the plan-level field to where the total sum value or even distribution from this cost type will populate.
- **Multiplier**: Multiply all values by a common multiple. i.e. “1000” if all values are to be 1000x whatever is entered. So, typing 1000 would really be 1,000,000.
- **Read Only**: Check the check box if data is imported/synced from financial system via integration, or only imported from elsewhere, such as the Resource Plan.
- **Status Date**: As applicable, select a date. All costs prior to and including that date will be locked for editing. For example, if it the end of 2019, and all budgets have been approved through July 2019, enter 7/31/2020. Everything prior to July will be un-editable. August 2020 forward will still be editable.
- **Lock Field**: Select the applicable plan-level field that will be used for locking the cost type. This setting is used in conjunction with the Calculations settings.
- **Available Apps**: Select whether the cost type should show in the Financial Plan, Resource Plan, or both.
- **ImportMethod**: Select the cost import method. Options include **BlendedRates** or **ActualRates**. Blended rates are a standardized rate for a role or business unit. Actual rates are an individual resource's actual rates.
- **Import From:** Select the source for the cost import, if applicable. Typically, the Resource Plan cost types import into the Financial Plan cost types. You may need to create the Resource Plan cost type from which this cost type's data will come. Then, come back in here and select the source cost Import From option.
- **Auto Import:***Available when **Import From** is set to **Resource Schedule** or **Timesheets**.* Check the check box to auto import the cost type to the set location.
  NOTE: For **Auto Import** to function, you must setup the **Cost Type Import** schedule. See Enable automatic cost imports for instructions.
  NOTE: Selecting Auto Import for a cost type will capture daily Resource Plan data, even if the schedule is set to another time period. This is because the auto import function brings in both resource data tasks. The task related functionality only works when the data is daily. You can bring in other time period data (monthly, for example) by using the **Import** button in the Resource Planner.
- **Plan Types**: Select which plan types will see this cost type on the Financial Planner. Select one or multiple that apply.



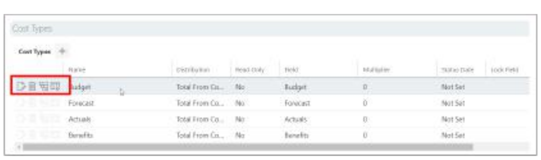
Enable automatic cost imports

To enable automatic cost imports:

1. Go to the Admin pages, select **General** in the navigation. Then, expand the **Schedules** topic heading.
2. Select the **Edit** icon for the schedule function **Cost Type Import**. The **Edit Schedule** form will open.
3. Complete the **Edit Schedule** form:
   - **Schedule Type:** Select the type of schedule to run the Cost Type Import function. Options are **Daily** and **Monthly**.
   - **Days of Week:** Select which day(s) of the week to run the Cost Type Import function.
   - **Time of Day:** Select the time of day to run the Cost Type Import function.
   - **Timezone:** Select the timezone where the function schedule will run.
4. Select **Save**. Cost type imports will now automatically run on the schedule you have set.



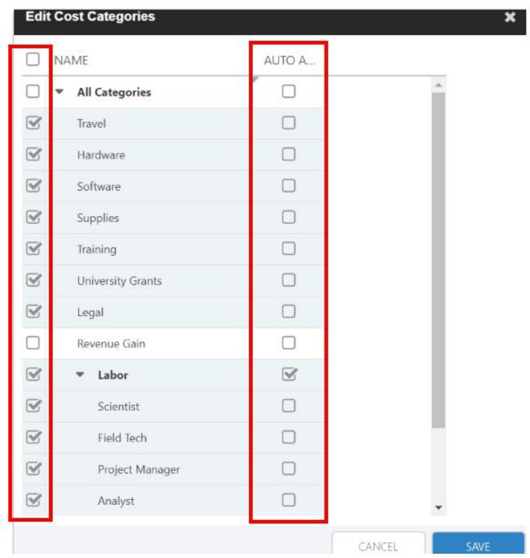
Cost type menu



- **Edit**
- **Delete**
- **Cost Categories**: Click the Cost Categories icon to configure which cost categories will show for each cost type.
- **View Config**: Click View Config to manage the default grouping & which cost category fields show for each cost type.

Edit cost categories

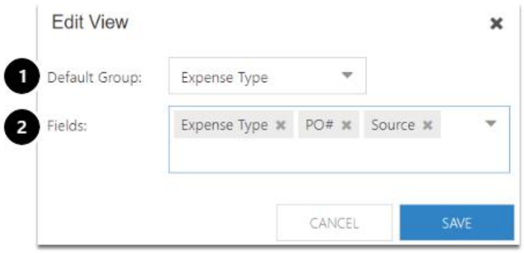
1. Select the check boxes for the applicable cost categories for this cost type. If you select a parent/summary row, all children rows beneath will be checked. Leave the check boxes clear for any categories that don't apply.
2. Auto Add: Select the check box if you want to have any newly created children cost categories to be auto-added to this cost type. For example, if you have the Labor cost categories selected, with the Auto Add check box selected, if a new role were added to Roles configuration, that role cost category would automatically be added and selected for this cost type.



Edit cost view

Select a Default Group field. If left blank, the default will be No Group.

Select any applicable cost category fields for this cost type.



Cost Type Settings

On the Resource Plan settings page, expand the **Types** topic heading.

> **NOTE**
> The Cost Types page shows on both the Financial Plan and Resource Plan settings pages, regardless whether some cost types are only for financial or resource planning (or both).

Cost types allow organizations to calculate, evaluate and monitor how resources are being allocated. There are possible (and often likely) differences between how your resources' time is initially planned, booked onto specific work, and then actually spent. The Resource Plan allows multiple cost types so organizations may analyze the differences. When multiple cost types are built, users 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. Here are some example use cases that may apply, for reference.

- The **Committed Hours** cost types 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 work/tasks 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.

Add a New Cost Type

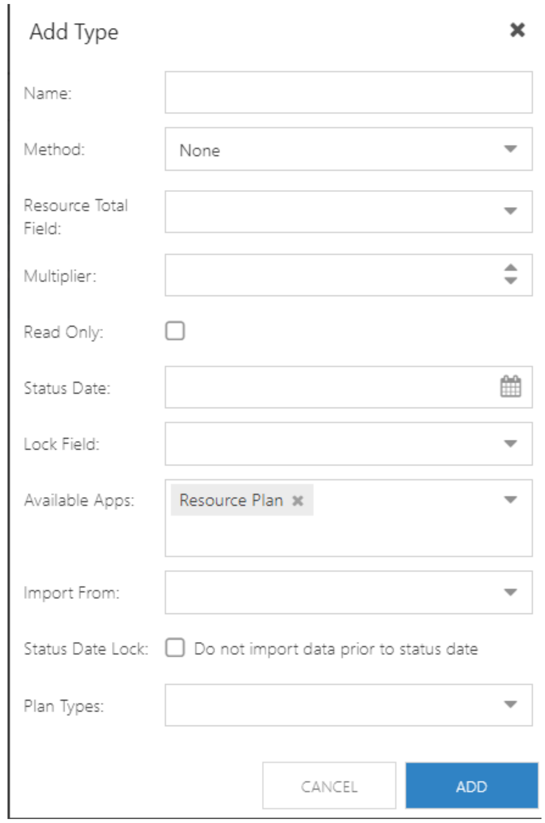
1. Click the Add Type (+) button.
2. Complete the Add Type form.
   - **Name**: Enter the name of the cost type.
   - **Method**: Select None, Even, or Total of Cost Type.
   - **Resource Total Field**: If a method is selected as "Even" or "Total of Cost Type," Field will show. Select the plan-level field to where the total sum value or even distribution from this cost type will populate.
   - **Multiplier**: Multiply all values by a common multiple. i.e. "1000" if all values are to be 1000x whatever is entered. So, typing 1000 would really be 1,000,000.
   - **Read Only**: Select the check box if data is imported/synced from another system via integration, or only imported from elsewhere.
   - **Status Date**: As applicable, select a date. Data entries from before the set date in all resource plans across all plans for the given cost type will be locked for editing. For example, if it is mid 2019 and all resource plan hours have been approved through July 2019, enter 7/31/2019. Everything through July will be locked/un-editable. August 2019 and forward will still be editable.
   - **Lock Field**: Select an applicable yes/no plan-level field that will be used for locking the cost type, if needed. This method will only lock the resource plan for the given plan and cost type. This setting can be used in conjunction with the Calculations settings to create automations. For example, you can create a calculation for the plan that if State = Closed, then [the selected Lock Field] = true, thus locking the resource plan.
   - **Available Apps**: Select whether the cost type should show in the Financial Plan, Resource Plan, or both.
   - **Import From:** Select the source for import, if applicable. Options include:

    - None
    - Resource Planner (*[Cost Type]*): Allows users to import from one resource plan type to another (for example, scheduled, to committed).
    - Timesheets: Allows users to import resource plan data from the Timesheets type.
    - Resource Schedule: Allows users to import resource plan data from the Resource Schedule type. Includes all users who the plan is shared with.
    - Resource Schedule (Assignments): Allows users to import resource plan data from the Resource Schedule type, but only includes users assigned tasks in the schedule.
- **Status Date Lock:** Check the check box to prevent import of data from resource plans prior to the set Status Date.
- **Auto Import:***Available when **Import From** is set to **Resource Schedule** or **Timesheets**.* Check the check box to auto import the cost type to the set location.

> **NOTE**
> For **Auto Import** to function, you must setup the **Cost Type Import** schedule. See Enable automatic cost imports for instructions.

> **NOTE**
> Resource Schedule imports update in real time when the Auto Import box is checked. You do not need the Cost Type Import schedule set for this function to work.

- **Plan Types:** Select which plan types the cost type will apply to.



Manage Cost Types

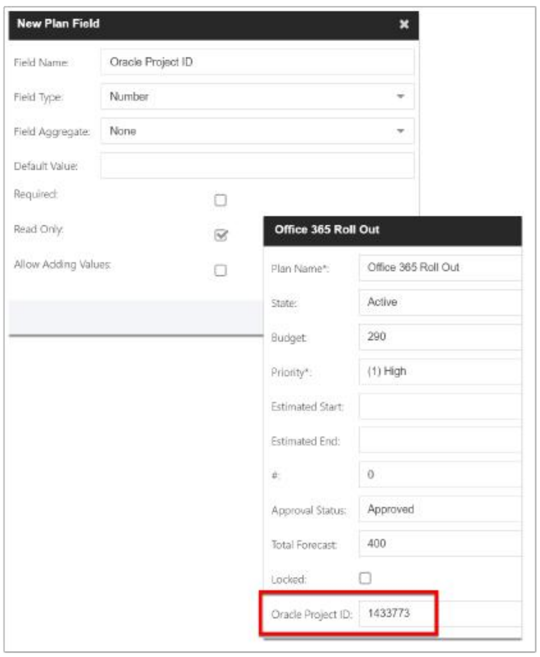
- **Edit** - Open the Type form to edit the settings for the cost type.
- **Delete** - Delete the cost type.

Selecting Delete will delete all data in the cost type.

How do I manage importing costs from another system?

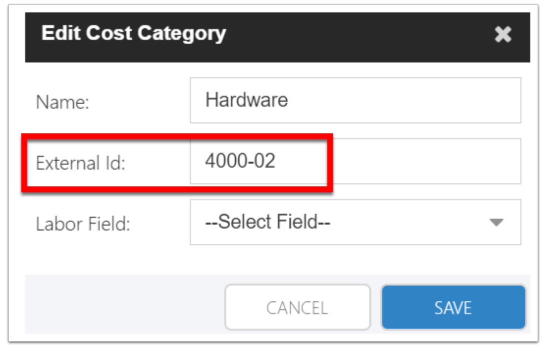
This article explain how the OnePlan solution is integrated to another financial system. The integration itself is configured via our integration platform OneConnect. The information in this article is for ongoing management of the external ID fields. When an integration is built to import costs from another financial system, the external IDs are used for mapping the plans (projects, etc.) as well as cost categories (i.e. charge codes, cost codes, etc.).

Plan-level Field



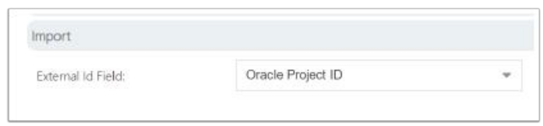
There needs to be a plan-level field as a unique identifier (ID) that will be mapped to the other financial system. This may or may not be read only, depending on how plans are created and updated (whether in OnePlan or the other system).

Cost Category External ID



For each cost category, a unique External ID field will be mapped to the corresponding charge/cost code in the other financial system.

Import Settings, External ID Field



Navigate to the Financial Plan admin settings page. Expand the Import topic heading. Select the plan-level field that is used as the External ID field.

How do I manage Cost Fields?

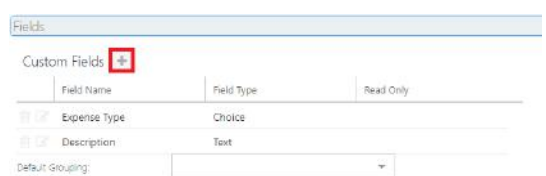
This article explains how to create and manage custom cost category fields in OnePlan. This requires the app 'Financial Plan' is installed.

Go to the Admin pages, select **Financial Plan** in the navigation. Then, expand the **Fields** heading.

Add Custom Cost Field

To create a custom cost field:

1. Click **Add Cost Field** (+).



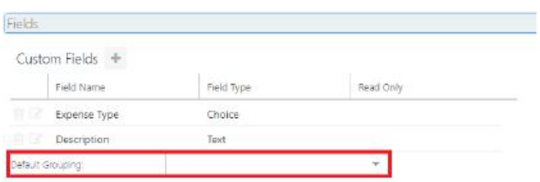
2. Complete the Cost Field form.
   - **Field Name**: Enter a name for your new field.
   - **Field Type**: Select the type of field. Choice fields will show on the Cost Categories page,

for you to select the choice values. User fields allow users to add names/accounts of users already in the OnePlan Resource Center. If you want users to add names of people who aren't in OnePlan as resources, select Text as the field type.

- **Read Only**: Select the check box if the value for the cost field will be set by the admin on the Cost Categories page. Users will be able to see the value, but not edit it.
- **Choices** (if applicable): Add the available choices. You can edit and delete choices as well.

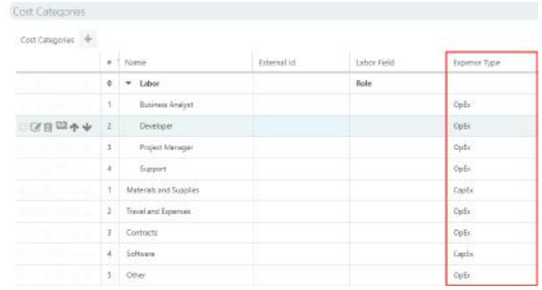
Default Grouping

If desired, select the default grouping for the cost categories. If left blank, the default will be ungrouped. Users will still be able to change the grouping whether or not the admin selects a default grouping. Only custom fields that are field type 'choice' can be selected for grouping.



Populate Fields

Navigate to the **Cost Categories** heading in the **Financial Plan** settings. For any fields that are choice, you can pre-select the choices for the cost categories. Be sure to pre-select the choice values for the cost categories if you made the field read only. If it's not read only, you can pre-select the choices, and then the users can still make their selections as needed for each financial plan.



How do I manage Cost Categories?

This article explains how to create and manage cost categories for OnePlan. This requires the app 'Financial Plan' is installed. All Cost Categories are configured on this page. Then, later, select which cost categories are shown for each Cost Type.

Go to the Admin pages, select Financial Plan in the navigation. Then, expand the Cost Categories topic heading.

What are 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 can be separately configured per cost type. For labor cost categories, configure the rate table over time per labor cost category.

Manage Cost Categories

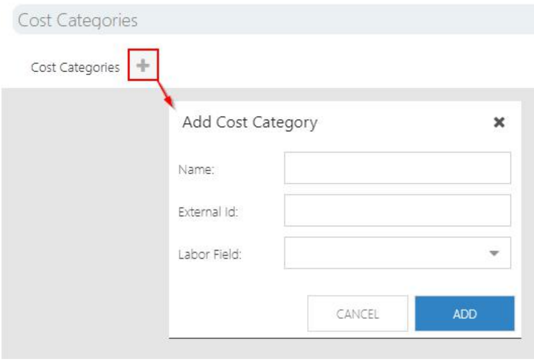
Use the contextual menu to manage your cost categories.

- **Add Child**: You can use this to build out a hierarchy of cost categories. However, in reporting, cost category structures are more straight forward if they are in a flat hierarchy (meaning not using parent/children relationships). Instead, use the Cost Category Fields to further distinguish cost categories within a flat hierarchy.
- **Edit**: Make changes to the cost category Name, External ID, and/or Labor Field

- **Delete** Click to delete the cost category. Doing so will delete all associated data in that cost category.
- **Rates** : Rates are applicable for labor cost categories. When configured with rates, the resource plan hours will be converted to labor costs by multiplying by the rates.
- **Move Up** : Click this to rearrange the order of cost categories.
- **Move Down** : Click this to rearrange the order of cost categories.

Add New Cost Category

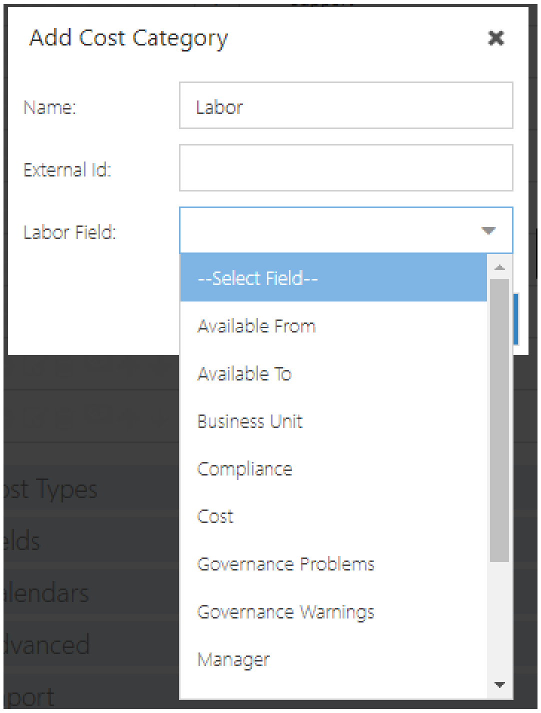
1. Click **New Cost Category** (+).
2. Complete the **New Cost Category** form.
   - **Name**: Enter the name of the cost category.
   - **External ID**: If this cost category will be mapped to another financial system via integration, enter the ID for this category that matches the other system. This is how data will copy into this specific cost category.
   - **Labor Field**: If this is a labor cost category, select the desired resource-level field. See notes below on Labor Cost Categories below for more details.



Labor Cost Category

When doing labor/resource financial planning, labor costs can be entered directly, or they can be imported in from the resource plan hours. This is when the rates are applicable. The hourly rate is multiplied by the number of hours. Do not add the individual labor categories directly.

For example, if you will do resource cost planning, add a cost category called Labor (or something along those lines). Then, select the desired Labor Field. Each item in that selected labor field will be listed as a cost category under the Labor (or whatever you called it) heading.

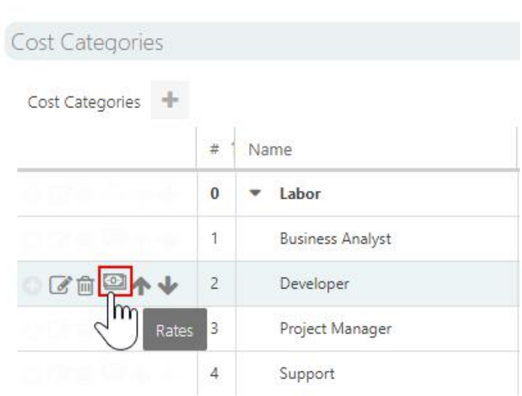


Add a Labor Cost Category

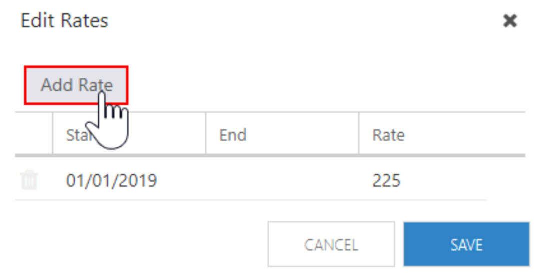
1. Follow the instructions in Add New Cost Category [83].
2. In the **Labor Field** dropdown, select a resource-level field. If you don't have your desired field created yet, go create the field. Then return to configure your labor cost category.

Add Rate Tables for Labor Cost Categories

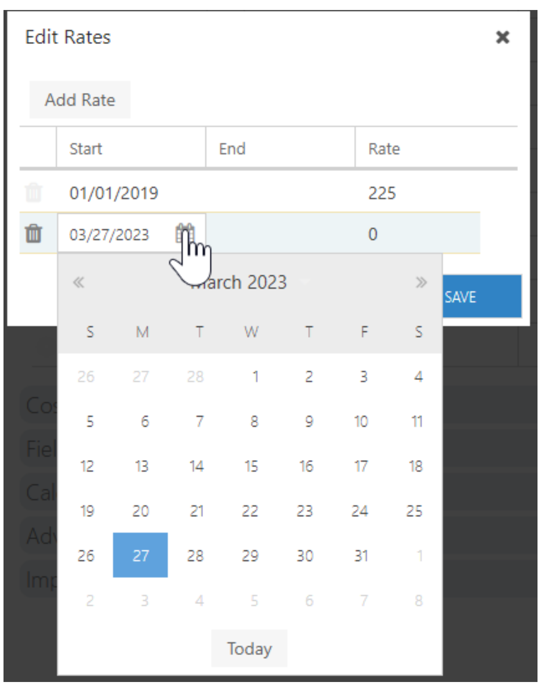
For each Labor Cost Category, populate the rate table. Click the **Rates** icon.



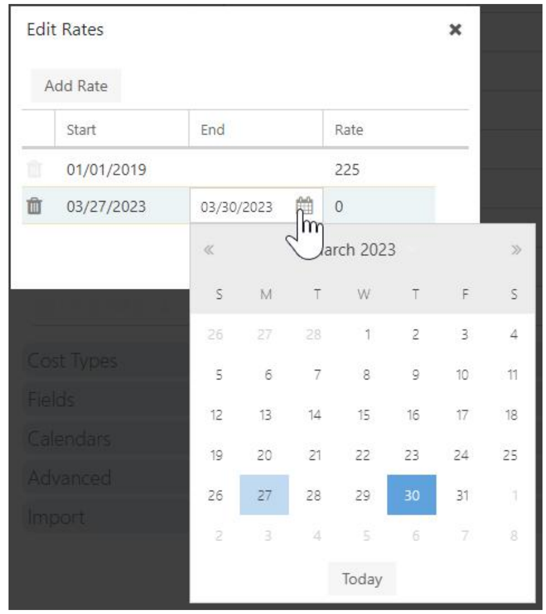
1. Click **Add Rate**.



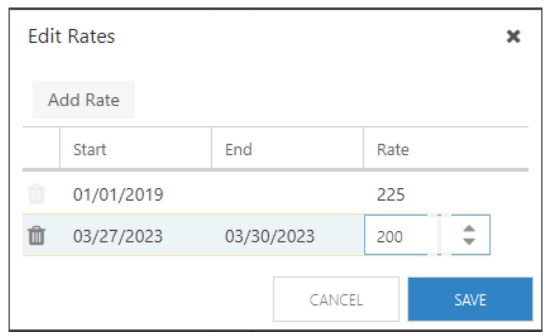
2. Enter the **Start Date** for the rate. Typically this is the beginning of when data is in the system.



3. Enter the **End Date**, if applicable. If End Date is left blank, the rate will be set ongoing for all future planning periods (months, years, etc.).



4. Enter the hourly **Rate**.



5. Click **Save** to create the rate table.

Insights App

Configure Insights

This article explains how to configure Insights settings. This requires the app 'Insights' to be installed. See How do I add apps? [71]

Go to the Admin pages, select Insights in the navigation.

Resource Insights

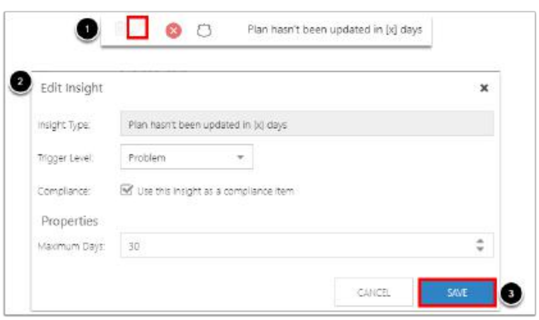
Expand the Resource Insights topic heading.

Resource insights appear on the Home page for OnePlan users. See Review Your Insights for more detail on resource insights.

Edit Resource Insights

To edit a resource insight:

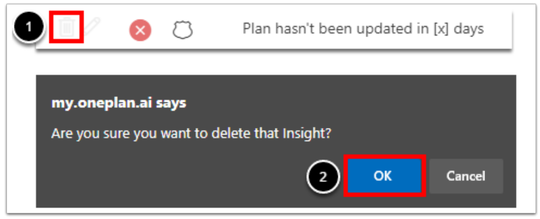
1. Click the **Edit** icon next to the desired insight. The **Edit Insight** form will open.
2. Update the **Edit Insight** form. Editable fields include:
   - **Trigger Level:** Select the trigger level for the insight. The trigger level indicates how severe an insight notification is. Options include Information, Warning, or Problem.
   - **Compliance:** Check the check box if the insight will be counted as a compliance item.
3. Click **SAVE**.



Remove Resource Insights

To remove a resource insight:

1. Click the **Delete** icon next to the desired insight.
2. Click **OK** on the pop-up warning to confirm the removal.

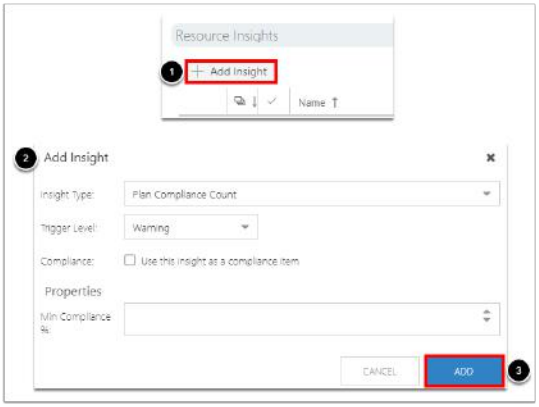


Add Resource Insights

NOTE: The Insights app comes with all of the resource insights pre-configured. You will not be able to create any new insights unless you remove some of the default insights.

To add a new resource insight:

1. Click the **Add Insight** button. The **Add Insight** form will open.
2. Complete the **Add Insight** form.
   - **Insight Type:** Select an insight type. You are not able to customize resource insight types.
   - **Trigger Level:** Select the trigger level for the insight. The trigger level indicates how severe an insight notification is. Options include Information, Warning, or Problem.
   - **Compliance:** Check the check box if the insight will be counted as a compliance item.
   - **Min Compliance % (If Applicable):** Enter the minimum compliance percent to trigger the insight.
3. Click **ADD**.



Plan Insights

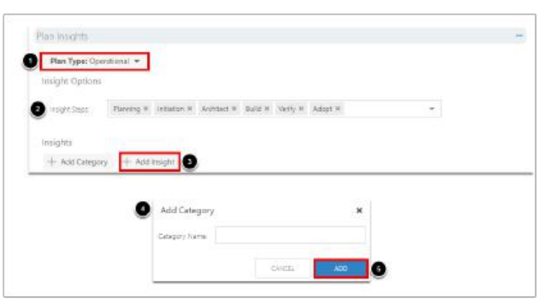
Expand the Plan Insights topic heading. Plan insights are pre-filtered by plan type. Click **Plan Type** and select the desired plan type from the drop down.

Plan insights appear in the **Reports** tab in a plan. See View Plan Insights for more detail on plan details.

Create a Plan Insight Category

To create a plan insight category:

1. Click **Plan Type** and select the plan type to apply the new insight category.
2. (Optional) In the **Insight Steps** drop down, select the plan state(s) where the insight category can apply to.
   NOTE: Insight steps are pre-selected based on the plan type. This applies to all insights within the selected plan type.
3. Click **Add Category**. The **Add Category** form will open.
4. Complete the **Add Category** form.
   - **Category Name:** Enter the name of the new category.
5. Click **ADD**.



Create Plan Insights

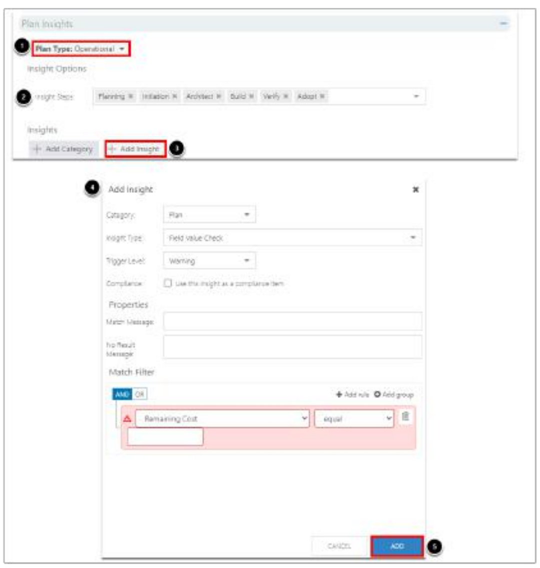
To create a new plan insight:

1. Click **Plan Type** and select the plan type to apply the new insight.
2. (Optional) In the **Insight Steps** drop down, select the plan state(s) where the insights can apply to.
   NOTE: Insight steps are pre-selected based on the plan type. This applies to all insights within the selected plan type.
3. Click **Add Insight**. The **Add Insight** form will open.
4. Complete the Add Insight form.
   - **Category**: Select the insight category from the drop down. Categories are customizable and will vary.
   - **Insight Type**: Select the insight type from the drop down. Options include Plan has not been updated in [x] days, Task Field Value Check, Field Value Check, Plan has unsubmitted Status Reports, Plans should have a Financial Plan, Plan has task updates, and Plans should have a Work Plan.
   - **Trigger Level:** Select the trigger level for the insight. The trigger level indicates how severe an insight notification is. Options include Information, Warning, or Problem.
   - **Compliance:** Check the check box if the insight will be counted as a compliance item.
   - **Maximum Days** (if plan type **Plan has not been updated in [x] days** is selected): Enter the maximum number of days a plan can be stagnant before a problem insight is thrown.
   - **Success Message** (if plan type **Task Field Value Check** is selected): Enter a message to be displayed if the task field value check is successful.
   - **Problem Message** (if plan type **Task Field Value Check** is selected): Enter a message to be displayed if the task field value check fails.
   - **Work Type** (if plan type **Task Field Value Check** is selected): Select a work type from the drop down.
   - **Filter** (if plan type **Task Field Value Check** is selected): Create rules to compare task fields. The fields and comparison

calculations available will vary based on your selections and OnePlan configuration.
NOTE: You can add multiple comparison rules.

- **Match Message** (if plan type **Field Value Check** is selected): Enter a message to be displayed if the field value check is successful.
- **No Result Message** (if plan type **Field Value Check** is selected): Enter a message to be displayed if the field value check fails.
- **Match Filter** (if plan type **Field Value Check** is selected): Create rules to compare field values. The fields and comparison calculations available will vary based on your selections and OnePlan configuration.
NOTE: You can add multiple comparison rules.

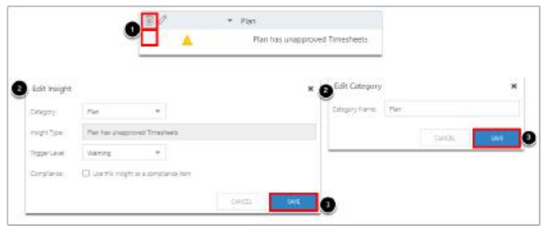
5. Click **ADD**.



Edit Plan Insights and Categories

To edit a plan insight or category:

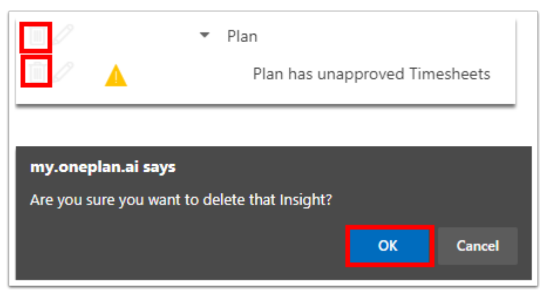
1. Click the **Edit** icon next to the desired insight. The **Edit Insight** or **Edit Category** will open.
2. Update the **Edit Insight** or the **Edit Category** form. Editable fields include:
   - **Edit Insight**
     - **Category:** Select the insight category from the drop down. Categories are customizable and will vary.
     - **Trigger Level :** Select the trigger level for the insight. The trigger level indicates how severe an insight notification is. Options include Information, Warning, or Problem.
     - **Compliance:** Check the check box if the insight will be counted as a compliance item.
   - **Edit Category**
     - **Category Name:** Update the name of the category.
3. Click **SAVE**.



Remove Plan Insights and Categories

To remove a plan insight or category:

1. Select the **Delete** icon next to the desired insight or category.
2. Click **OK** on the pop-up warning to confirm the removal.



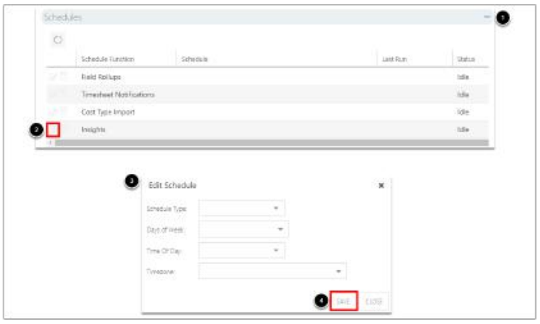
Schedule automatic Insights refresh

This article explains how to schedule automatic refreshes for Insights (including resource and plan insights). This requires the app 'Insights' to be installed and configured. See How do I add apps? [71] and Configure Insights. [85]

Go to the Admin pages and select General in the navigation.

Set a Schedule for Automatic Refresh

1. Expand the Schedules topic heading.
2. Click the Edit icon next to Insights. The Edit Schedule form will open.
3. Complete the Edit Schedule form.
   - **Schedule Type:** Select the type of schedule to run the Cost Type Import function. Options are **Daily** and **Monthly**.
   - **Days of Week:** Select which day(s) of the week to run the Cost Type Import function.
   - **Time of Day:** Select the time of day to run the Cost Type Import function.
   - **Timezone:** Select the timezone where the function schedule will run.
4. Click **SAVE**. Insights will now automatically refresh on the schedule you have set.



Integrations

OnePlan Integration settings

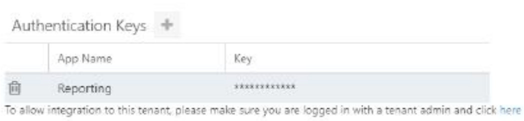
This article explains the Integration settings in the Admin pages of OnePlan.

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

Authentication Keys

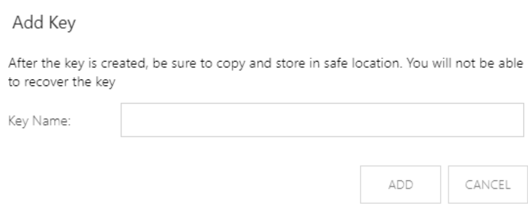
Any authentication keys that have been added, such as for reporting or integration will show on this page. You can't see the actual keys themselves, just the name.

Click Delete to remove a key if needed.

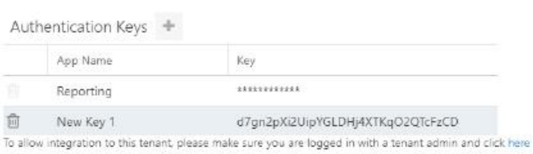


To create a new authentication key:

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



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

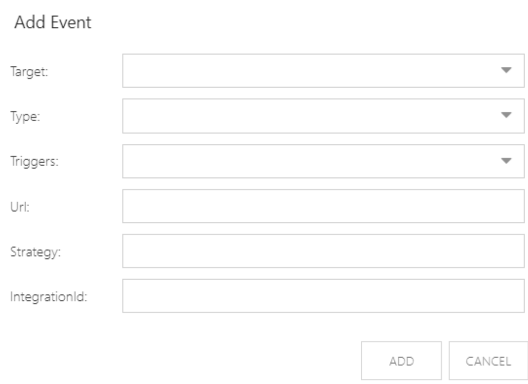


Events

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

To create a new event:

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



Integrations

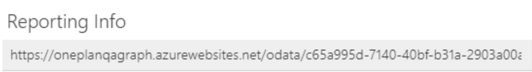
All integrations set up in your environment are listed in the Integrations section.

Click Delete to remove an integration if needed.

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

Reporting

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



KanBan Plan App

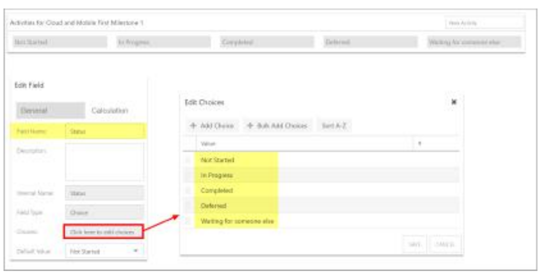
Customize the KanBan board

This article explains how to customize the Work Plan and My Work KanBan board columns.

This procedure requires the **KanBan Plan** app to be installed. See How do I add apps? [71] for instructions.

Go to the **Admin** pages.

By default, the KanBan board in the Work Plan and My Work areas use Choices from the the Status Work Field to create the columns in the board. For example, the KanBan shown has **Not Started**, **In Progress**, **Completed**, **Deferred**, and **Waiting for someone else** columns.

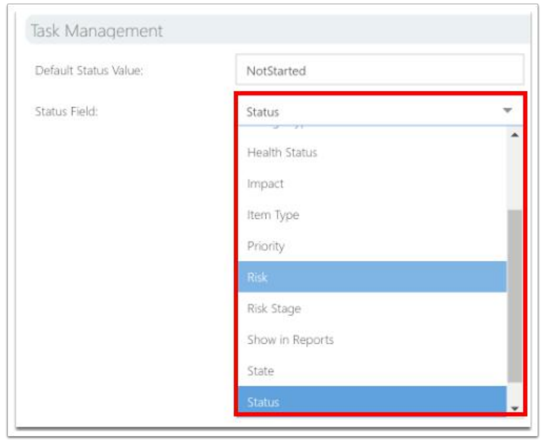


Update the KanBan Status Field setting

The KanBan board can use any Choice type Work Field to create columns in the board. The default field is Status.

To use another Choice type Work Field to create the columns in the board, you must update **Status Field** in the **KanBan Plan** settings.

1. Go to **KanBan Plan**.
2. Select the desired Choice type Work Field from the **Status Field** drop down.
3. Follow Update the default KanBan status value [91].



Update the default KanBan status value setting

The **Default Status Value** set in the KanBan plan is the status given to new activities in the Work Plan and My Work. These "statuses" are Choices of a Choice type Work field.

If the **Default Status Value** is changed or deleted in the Choice type Work Field, or the **Status Field** is changed in the KanBan settings, the **Default Status Value** must be updated in the **KanBan Plan** settings. If the **Default Status Value** is not updated, new activities will not be added to the board.

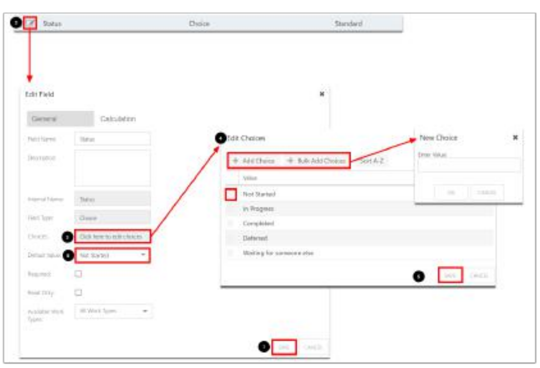
1. Copy the internal name of the desired default status. See **View Choice internal names** in View field internal names. [56]
2. Go to **KanBan Plan.**
3. Paste the internal name of the desired default status into **Default Status Value** field. Make sure the **Status Field** is set to the corresponding Work Field. See Update the KanBan Status Field setting [91].

Update the KanBan columns

The KanBan board uses the Choices of Choice type Work Fields as the column headers. To update the KanBan columns:

1. Go to **Fields > Work Fields**. Go to the desired Choice type field. In this example, we use the default **Status** field.
2. Click the **Edit** icon. The **Edit Field** form will open.
3. Click the **Choices** field. The **Edit Choices** form will open.
4. Update the **Edit Choices** form.
   - To delete a choice, click the **Delete** icon next to the desired choice.
   - To add a single choice, click **Add Choice**. The **New Choice** form will open. Enter the name of the new field in the form and click **OK**.
   - To add multiple choices, click **Bulk Add Choice**. The **New Choice** form will open. Enter the names of the new fields in the form and click **OK**.
5. Click **SAVE** to save the edits to the **Edit Choices** form.
6. Update the **Default Value** field in the **Edit Field** form if required.
7. Click **SAVE** to save the edits to the **Edit Field** form.
8. If required, follow Update the default KanBan status value setting [91] and/or Update the KanBan Status Field setting [91].

NOTE: See Create and edit fields [44] for more detail on fields.



Microsoft Teams App

How do I manage OnePlan in Microsoft Teams?

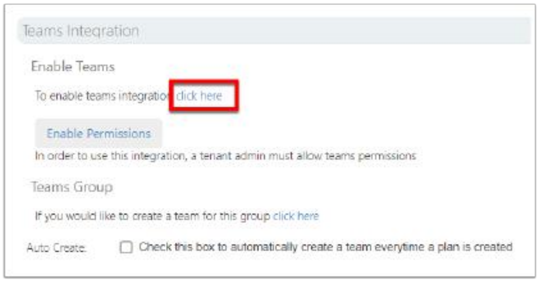
This article shows how to enable and use OnePlan within Microsoft Teams.

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? [71]

Enable Teams Integration

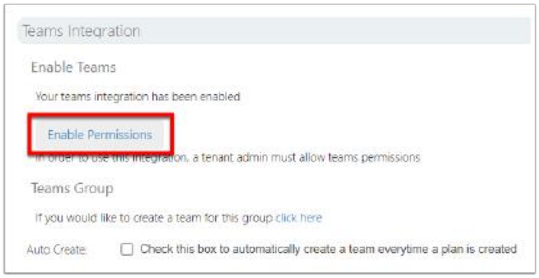
Click the link to enable the Teams integration with your OnePlan group.



Enable Permissions

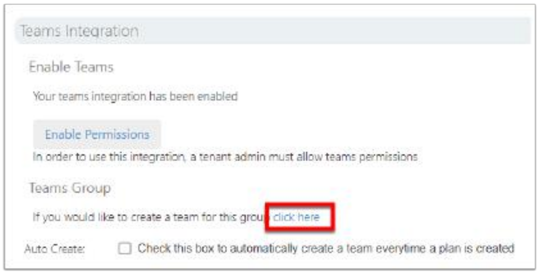
This step only needs to be done once per tenant. So, if you have multiple groups and the permissions were already enabled in another group, you can skip this step.

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**.



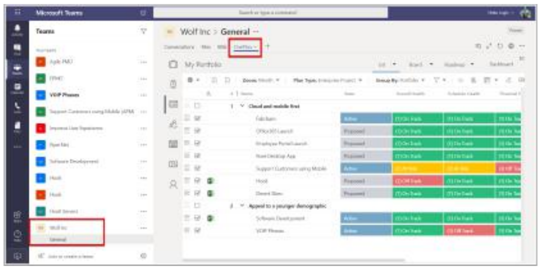
Create a Group Team

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

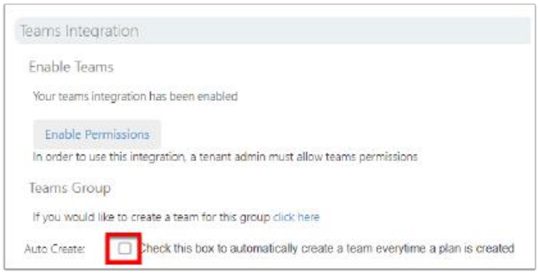
When the Group Level Team is created, a tab for OnePlan will show. All the functionality & modules of OnePlan are available within the Teams interface.



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.


Teams Integration
Enable Teams
Your teams integration has been enabled
Enable Permissions
In order to use this integration, a tenant admin must allow teams permissions
Teams Group
If you would like to create a team for this group click here
Auto Create:
Check this box to automatically create a team everytime a plan is created

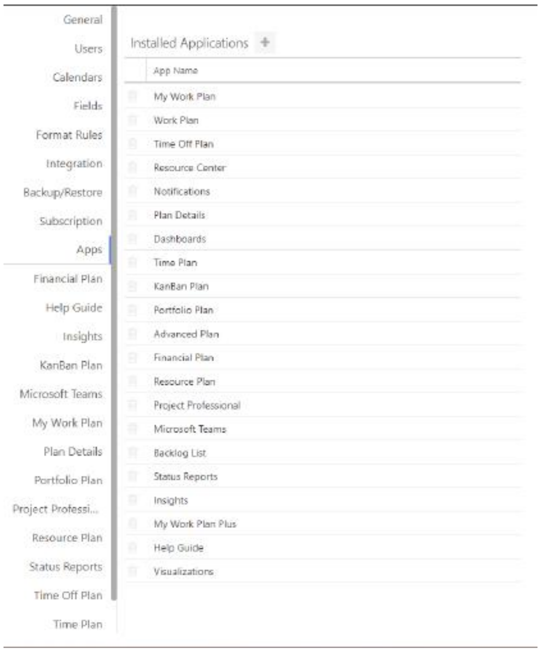
Modeler App

Install the Modeler App

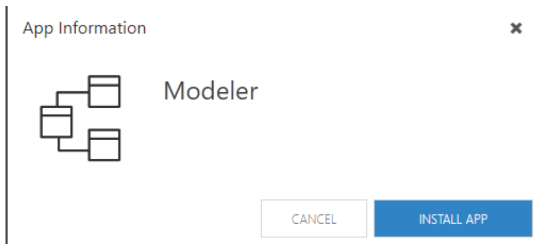
This article explains how to install the Modeler app into your OnePlan environment.

Also see How do I Add Apps to OnePlan? [71] for general guidance on how to install all apps in OnePlan.

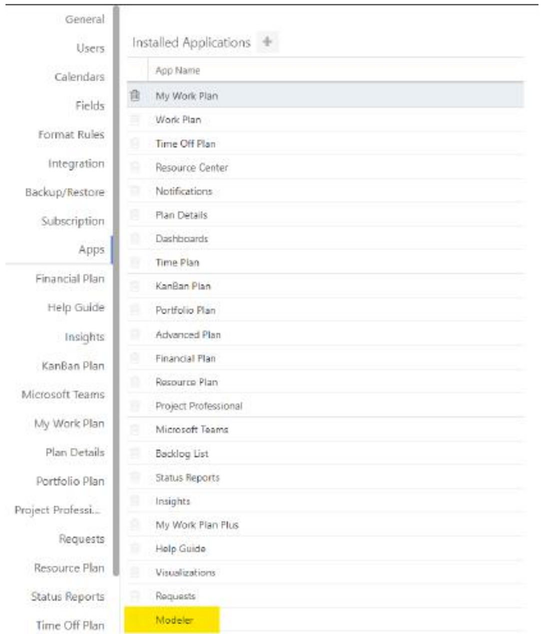
1. In the config/admin pages, go to **Apps**. Then click **Add App**. The **Add App** form will open.



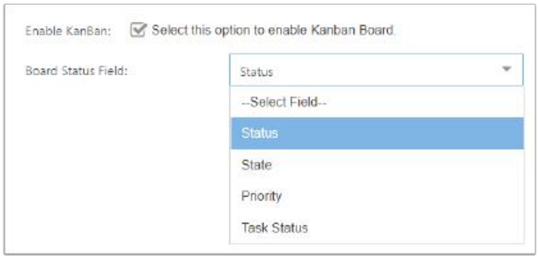
2. Select **Modeler.** A confirmation popup will open. Click **Install App** to install the Modeler app.



3. The Modeler app is now available in your OnePlan environment.



My Work Plan App



How do I manage the My Work settings?

This article explains how to configure My Work in OnePlan. This requires the app 'My Work Plan' is installed. My Work is a page designed for the end users of OnePlan, the team members, to go to a central location to view and update work assignments across all their plans. Make your selections with that in mind.

Go to the Admin pages, select My Work Plan in the navigation.

My Work Grid Page

- **Status Fields**: Select all the task/work-level fields that will show by default in the My Work view. Users will be able to add other columns to the My Work page as needed.
- **Require Approval**: When selected/checked, task updates require approval by the Plan Owner.

My Work KanBan Board Page

- **Enable KanBan**: When selected/checked, a KanBan Board shows as a 2nd page/module in My Work.
- **Board Status Field**: If you have the KanBan enabled, select a task-level choice field that will be the columns/swim lanes in the KanBan board.

Plan Details App

Set up plan detail form layouts

This article explains how to manage the layout of the Plan Details page in OnePlan. This requires the Plan Details App be installed. See How do I add apps? [71]

Go to the **Admin** pages, select **Plan Details** in the navigation.

https://player.vimeo.com/video/817324708

Add, edit, or delete process flow steps

To add a new step to a process flow:

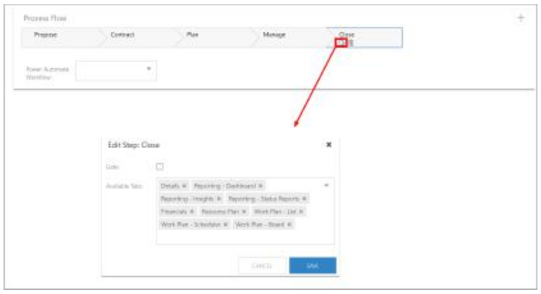
1. Click the **Add Step** icon. A new step will append to the end of the process flow.
2. Enter the name of the new step.

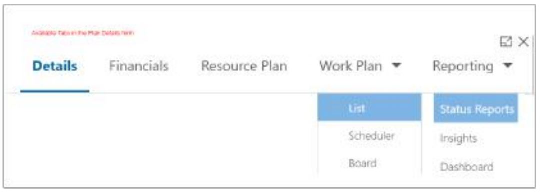
To delete a process flow step:

1. Select the delete icon on the step you want to delete. The **Delete Step** window will open.
2. Click **YES**.

To edit a process step:

1. Click the edit icon for the desired step. The **Edit Step** form will open.
2. Complete the **Edit Step** form.
   - **Gate:** Check the check box to add governance to the process flow. This will prevent users from moving to the next step in the process flow until your set requirements are met, such as approvals. This governance requires a Power Automate Flow to function. See Set Up the OnePlan Connector in Power Automate/Flow.
   - **Available Tabs:** Select the tabs you would like available in a plan when it is a in a particular step.
3. Click **SAVE**.



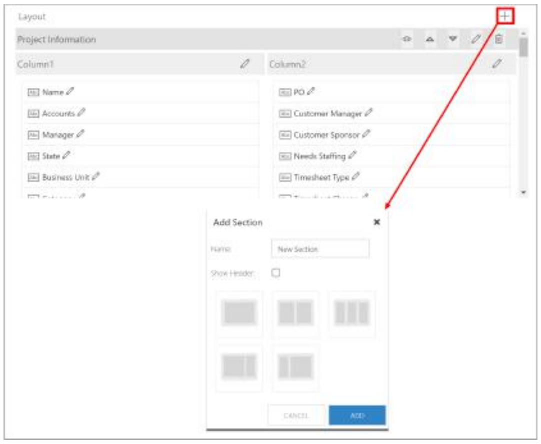


Add, edit, or delete form sections

Sections make up the main layout of the plan details form.

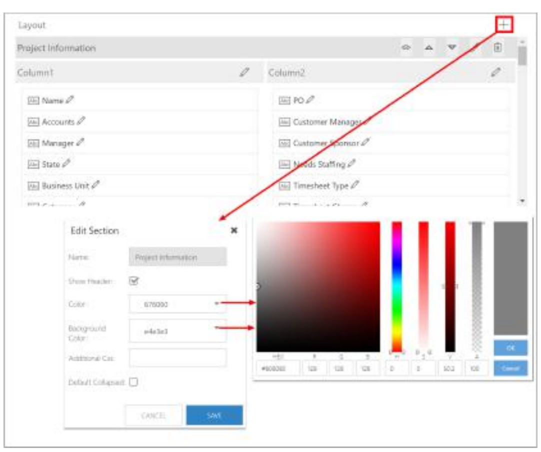
To add a new section:

1. Select the **Add Section** icon. The **Add Section** form will open.
2. Complete the **Add Section** form.
   - **Name:** Enter the name of the new section.
   - **Show Header:** Check the check box to show the section header.
   - **Layout:** Select the section layout.
3. Select **ADD**.



To edit sections:

1. Click the **Edit** icon next to the desired section header. The **Edit Section** form will open.
2. Complete the Edit Section form.
   - **Name:** Enter the name of the section.
   - **Show Header:** Check the check box to show the section header in the plan details form.
   - **Color**: Use the color picker to select the text color for the column header.
   - **Background Color**: Use the color picker to select the background color for the column header.
   - **Additional Css:** Enter any additional CSS that you would like to add to the section.
   - **Default Collapsed:** Check the check box if you would like the section content to be collapsed at default.
3. Click **SAVE**.



1. To show or hide a section, toggle the **Show/Hide** icon. You may want to use this feature if you are using a form template.

2. To rearrange sections, select the up or down arrows next to the desired section header.

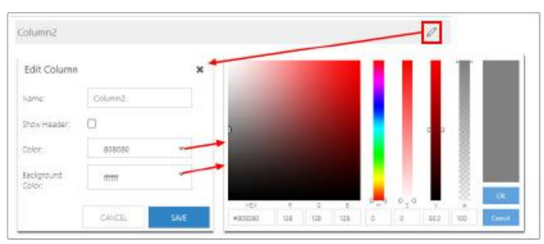
3. To delete a section, click the Delete icon next to the desired section header.

Edit form columns

Columns make up the form sections. You selected the column layout when you created the section. See Add, edit, or delete form sections [97].

To edit form columns:

1. Select the **Edit** icon next to the header of the desired column. The **Edit Column** form will open.
2. Complete the **Edit Column** form.
   - **Name**: Enter the name of the column.
   - **Show Header**: Check the check box to show the column header.
   - **Color**: Use the color picker to select the text color for the column header.
   - **Background Color**: Use the color picker to select the background color for the column header.
3. Click **SAVE**.

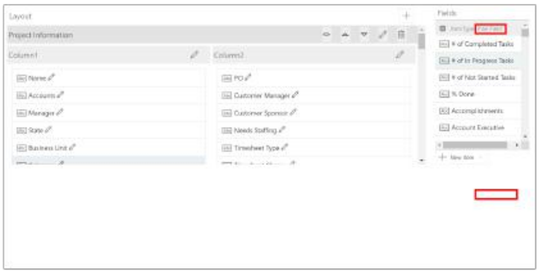


Add, edit, or remove form fields

Within the form sections, you can place form fields. These fields pull data from plan and summary fields across OnePlan.

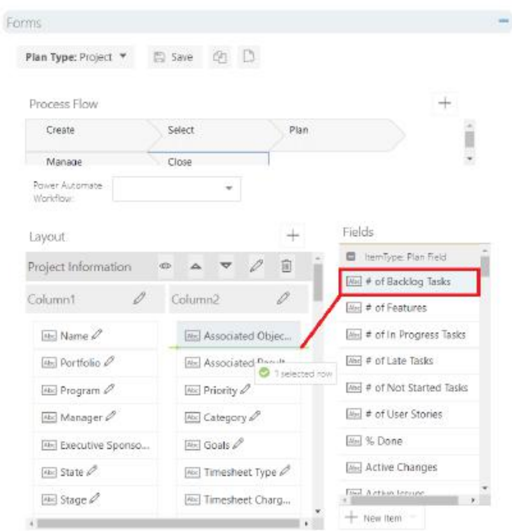
- **Plan** fields are independent fields from plans. These fields are inputted directly, and are not dependent on other fields.

- **Summary** fields aggregate data from the plan fields below it (like a Rollup, see Manage Field Calculations [58] for details).



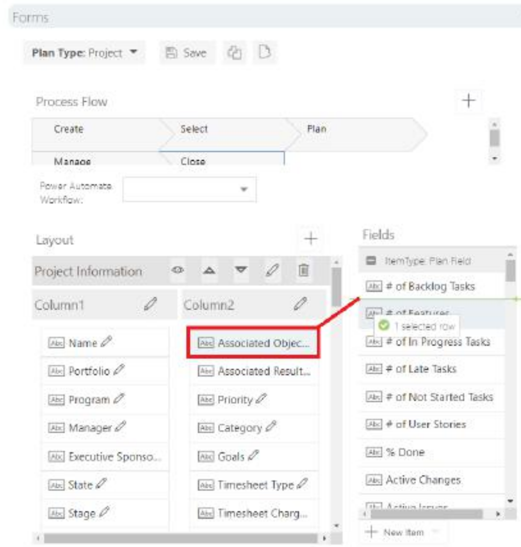
To add a new field to a section:

1. Select the desired field from the **Fields** panel.
2. Drag and drop the field into the desired location within a section.



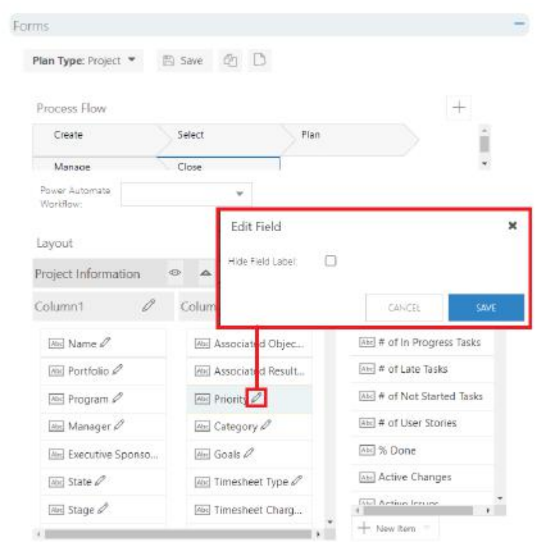
To remove a field:

1. Select the desired field within a section.
2. Drag and drop the field into the Fields panel. Ensure that plan fields are placed with plan fields, and summary fields are placed with summary fields.



To edit a field:

1. Select the Edit icon next to the desired field. The Edit Field form will open.
2. Complete the Edit Field form.
   - **Hide Field Label:** Check the check box to hide the field label in the Plan Details form.
3. Select **SAVE**.

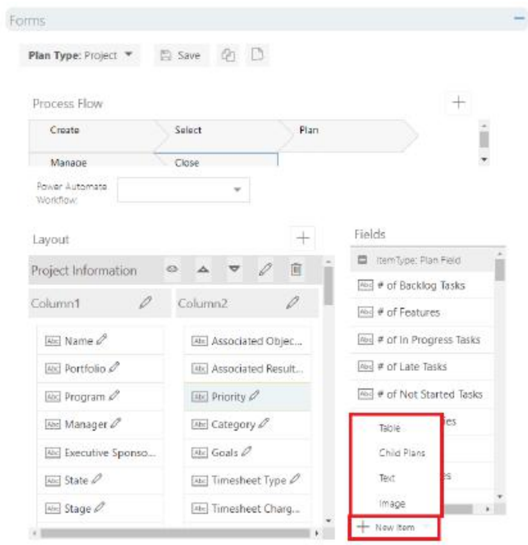


Create, add, edit, or remove field-level items

Items include tables, child plans, text, and images. These add additional information to your form to improve the user experience. Items can be added at the field-level of your form. Once items are created, they function like fields.

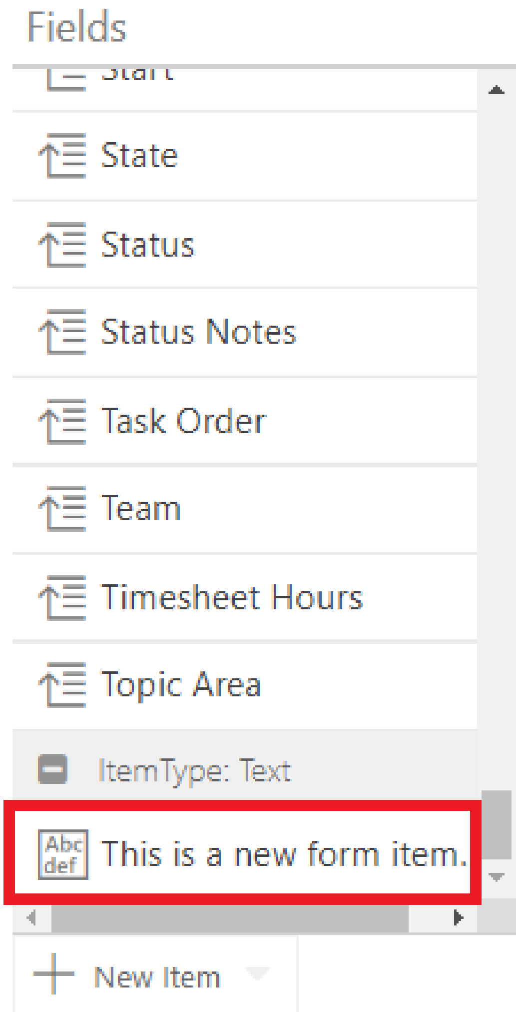
To create a new item:

1. Click **New Item**. Select the item type from the drop down. Options include table, child plans, text, and image.



2. Complete the Add [item type] form. In this example, we have added a Text field.
   NOTE: The forms will vary based on the item type chosen.

3. Click **Add**. The new item will appear as an option at the bottom of the Fields menu.



To add, edit, or remove an item in the form, follow the procedures in Add, edit, or remove form fields [98].

NOTE: The edit options will vary based on the item type (table, text, or image).

JavaScript Customization

Plan detail forms are now even more customizable with JavaScript.

You can add buttons, validate forms, create rules can to make plan level fields required, hidden, or read only based on business logic. and more.

Contact OnePlan for more information and assistance with the JavaScript customizations.

Plan details form JavaScript customization

This article describes the JavaScript customization capability in the Plan Details configuration. To access this, go to the Plan Details app and select a plan type. Then press the Validator JS Button. Each plan type will have its own validation code.

4 Tabs are available

- **Initialize:**
  - Used to build validators and changers. This code will be run 1 time during form building and will not be run again
  - a form variable will be passed in which will allow you to add validators and changers
- **Load Plan**
  - Used to process any plan related items every time a plan is loaded. This code will be executed every time the details form shows on the screen
  - a form variable will be passed in and can be used
- **Step Ids**
  - Used if you will be needing process step information
- **Fields**
  - List of fields and their internal names. Use the internal name to reference a field in the form

Object Functions available to use:

Form Functions

- **getField(fieldname)**
- **validateField(fieldname)**
- **validateAllFields()**

Fields Functions

- **validators.push({})**
  - **Error:** Message to show when validation fails.
  - **OnChange:** Set to true to validate when changing the field.
  - **Steps:** An array with the ids of steps you want to validate on when both changing a field value and when moving steps.
  - **Fn:** function for validating. Passes in a field and a step id.

Example:

```
form.getField("Name").validators.push({

 Error: ‘Cannot be blank’,

 OnChange: true,

 Steps: ["aeaf7420-9040-44a4-3a67-b3c45ef10997"],

 Fn: function(field, step)

 {

If(field.getValue() == “”)

 return false;

 }

})
```

- **changers.push({})**
  - **Fn:** Function when changing the value. Passes in the form, field, and step id*:*

```
form.getField("Name").changers.push({

 Fn: function(form, field, step)

 {

If(field.getValue() == “Some Name”)

 form.getField(“someField”).hide()

 }

})
```

- **getValue()**
- **setValue(v)**
- **hide()**Hide the field based on the response of a field.
- **show()**

Example: Hide the field based on the response of a field.

```
form.getField("FlagField").changers.push({

 Fn: function(form, field, step)

 {
```

```
var fieldValue = field.getValue("FlagField");

if(fieldValue)

form.getField('MultiBusinessField').hide()

else

form.getField('MultiBusinessField').show();

}

});
```

Customizations

Add button to toolbar.

- On init:

```
form.down("toolbar").add({

text: 'Test Button',

handler: function () {

var p =
DetailsApp.GetActivePlan(this);

OnePlanCore.Plans.GetPlan(p).then(func
tion (plan) {

//Do something with plan here

});

}

});
```

Set up plan detail form split fields

This article explains how to set up split fields in the plan details form.

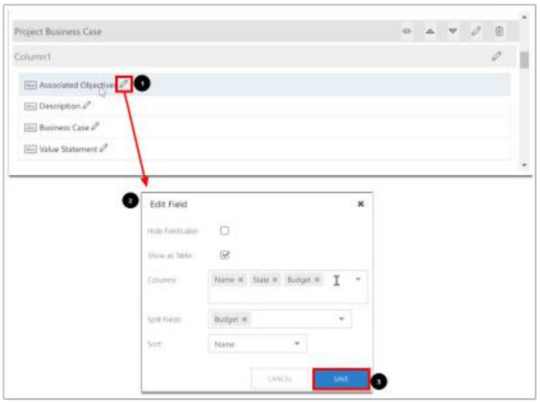
Split fields allow you to split plan costs between parent plans. For example, you could split project costs between multiple programs, departments, divisions, etc.

This procedure requires the Plan Details app to be installed. See How do I add apps? [71]

Go to the **Admin** pages > **Plan Details**. Select the desired plan type to edit the plan details form.

Create a split field

1. Be sure that you have *multi-select lookup field* set up in the plan details form.
   NOTE: You can only create split fields for multi-select lookup fields.
2. Select the **Edit** icon for the multi-select lookup field. The **Edit Field** form will open.
   - Check the check box for **Show as Table**. This will create a table in the form for the multi-select lookup field.
   - Select the columns you would like in the table from the **Columns** drop down.
   - Select the field that you would like to split from the **Split Fields** drop down.
3. Click **SAVE**. The split field will now be available in the plan details form for the selected plan type.

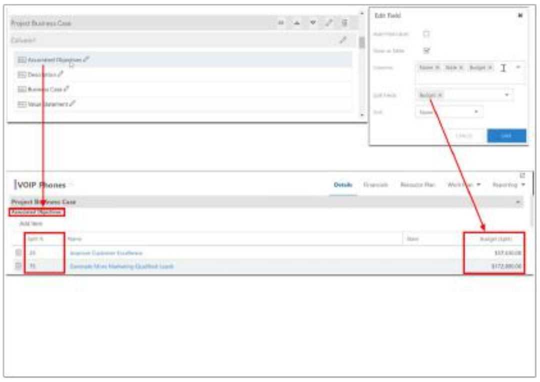


Example

In this example, there is a **Budget** split field for the multi-select lookup field **Associated Objectives** in a **Project** plan type plan details form.

There are two objectives related to the project **VOIP Phones**.

You can set the split percentage. Here we have a 25% and 75% split. This means that the objective "Improve Customer Experience" is allotted 25% of the project budget, and the objective "Generate More Marketing Qualified Leads" is allotted 75% of the project budget. You will see the **Budget (Split)** fields update as you change the split percentage.



How do I set up the Details Process Flow stages?

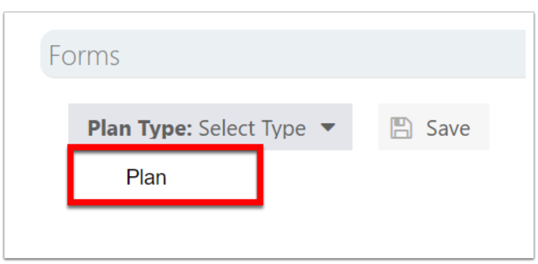
This article explains how to manage the Process Flow on the Plan Details page in OnePlan. This requires the Plan Details App be installed.

Go to the Admin pages, select Plan Details in the navigation.

Select Plan Type

On the Plan Details setting page, expand the Forms topic heading.

If multiple plan types are in use, each plan type may have differently configured details pages. Select the desired plan type to configure.



Add Process Flow Stage

Click the [+] icon to add a new stage/phase to the process flow. After the stage is create, select any stage to edit or delete.

Edit Process Flow Stages

Rename Stage

Drag Stage

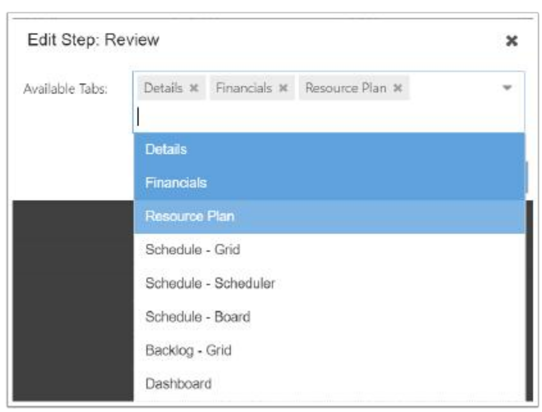
Initially, the new stage will be added at the end. Drag the stage to the appropriate place in the process.

Click any existing stage to edit or delete.

Edit Stage Tabs

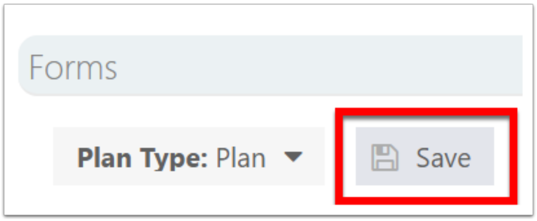
Click the Edit icon. Select which tabs to show along the top of the plan. Select none, one, or multiple by clicking to select and deselect. A use case for this could be the following scenario:

When a new plan is in the Create stage, perhaps only the Details, Financials and Resource Plan tabs will show. Then, in the Review stage, show the Dashboard tab as well. Then, when the plan moves into the Plan stage, the Schedule and/or Backlog tabs could also be added to show, for execution. This is just an example. Your organization may show some or all tabs for all stages, or whatever is best applicable to your process and use case.



Save Changes

Changes to the Details page are not automatically saved. Click the Save button to save changes.



New Process Flow Stage with Selected Tabs Shown

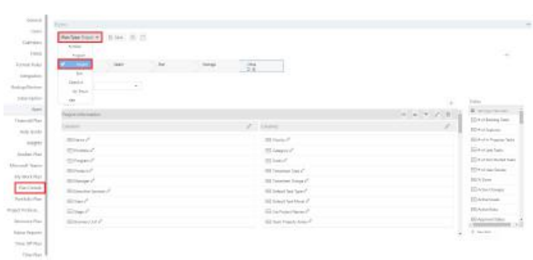
Set Up Visualizer

This article explains how to set up the Visualizer module for plans in your environment.

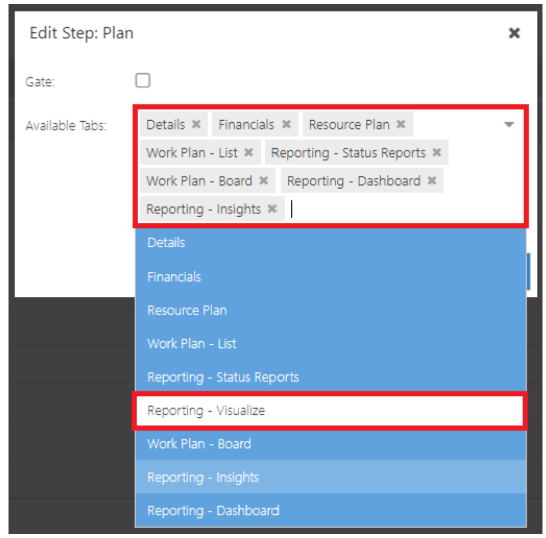
This procedure requires the Visualizer app to be installed. See How do I Add Apps to OnePlan? [71] for instructions.

You must be a OnePlan owner to set up the Visualizer module.

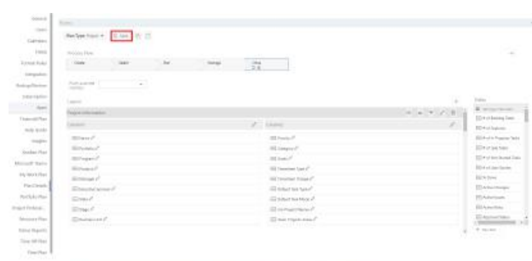
1. Click on the Settings icon to access the Admin pages.
2. Go to **Plan Details**.
3. Select the plan type you would like to add the Visualizer module to in the **Plan Type** drop down. In this example, I will add the Visualizer to **Projects**.



4. Click **Edit** for the process flow step where you would like to add the Visualizer module.
5. Click into the **Available Tabs** field, and select **Reporting - Visualize** from the drop down. Then click **Save**.



6. Repeat steps 4 and 5 for each process flow step where you would like the Visualizer module.
7. When you have the Visualizer module installed as desired for the selected plan type, click **Save**.



The Visualizer module is added to individual plan types and process flow steps within the plan details form. You must repeat this set up process for each plan type where you would like to use the Visualizer module.

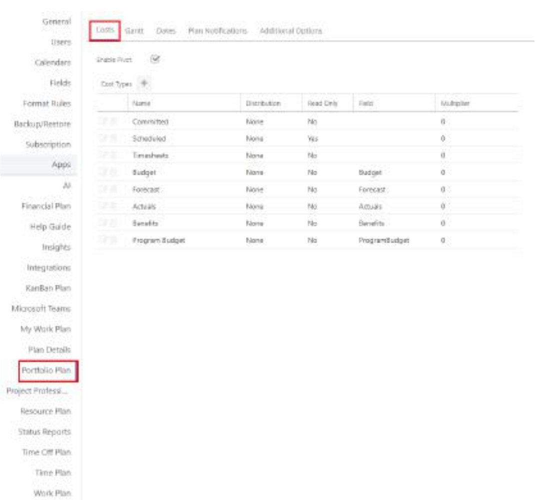
Portfolio Plan App

Manage the Portfolio Costs Settings

This article explains how to manage the Costs Settings in the Portfolio Plan Configuration.

Access the Portfolio Plan Costs Settings

To access the Portfolio Plan Costs settings, go to the Configuration area by clicking the Settings gear . Then select **Portfolio Plan** from the left navigation, and select the **Costs** tab.



Costs Settings

There are only a couple of settings in the Costs tab.

- **Enable Pivot**: Check the check box to enable/show the Pivot Table in the Portfolio area.
- **Cost Types**: All the cost types for Financial Plan and Resource Plan settings show. These are the cost types that are available for use in the Portfolio Pivot Chart. To manage the cost types, go to the Financial Plan and/or Resource Plan settings pages.

Set Up the Portfolio Plan Gantt Chart

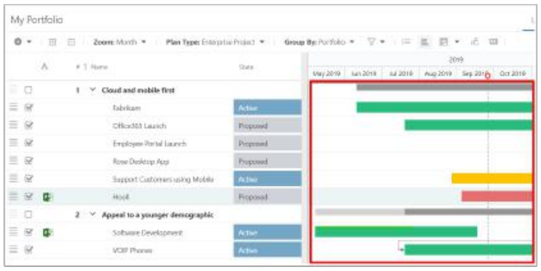
This article explains how to manage the Gantt chart settings in the Portfolios module in OnePlan.

Access the Portfolio Gantt Settings

Go to the OnePlan Configuration area by clicking on the Settings gear . Then select **Portfolio Plan** from the left navigation, and click on the **Gantt** tab.

Configure the Portfolio Gantt Bar Color Shading Logic

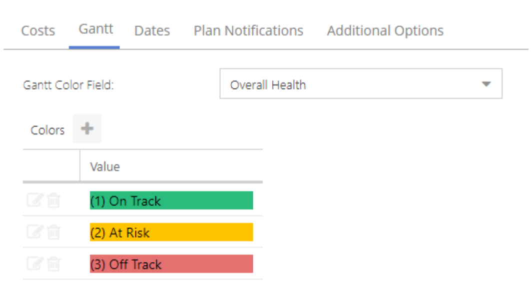
The Portfolio Gantt chart bars can have logic for color shading that is configurable in the Portfolio Plan > Gantt settings.



Out of the box, OnePlan utilizes the **Overall Health** field. The different bar colors correlate to one of three values for the **Overall Health** field:

- Green = On Track
- Yellow = At Risk
- Red = Off Track

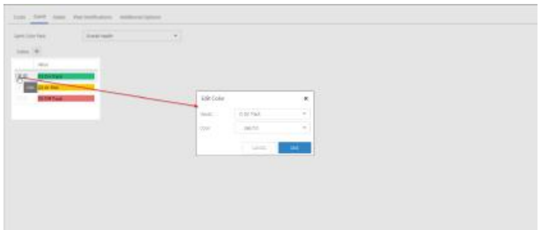
You can see how this logic is set up in the Portfolio Plan > Gantt settings. The Gantt Color field is set to **Overall Health**. Under the Colors settings, you can see the **On Track**, **At Risk**, and **Off Track** values and their associated colors.



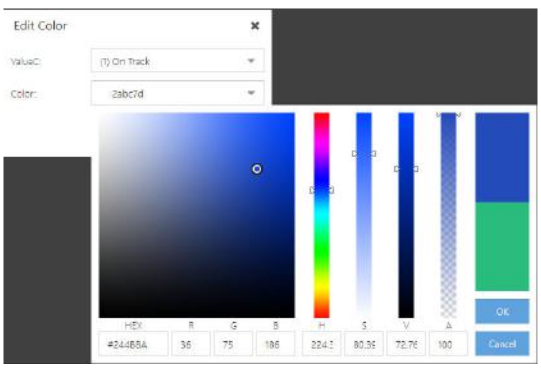
Edit Existing Color Settings

If you want to update the color logic settings for existing Colors:

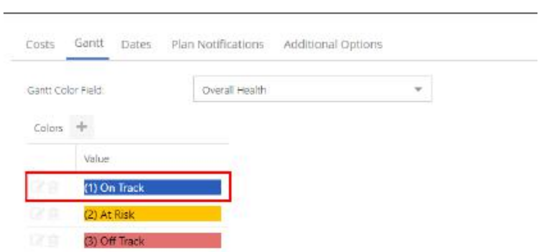
1. Click the Edit icon next to the desired color. The **Edit Color** form will open.



2. Since we are editing existing colors, we can leave the ValueC field as is. Click into the **Color** field, and the color picker will open. Use the color picker to select the new color for the selected value. You can also enter a HEX color code, or RBG values for your desired color. Then click **OK** to apply the new color setting.



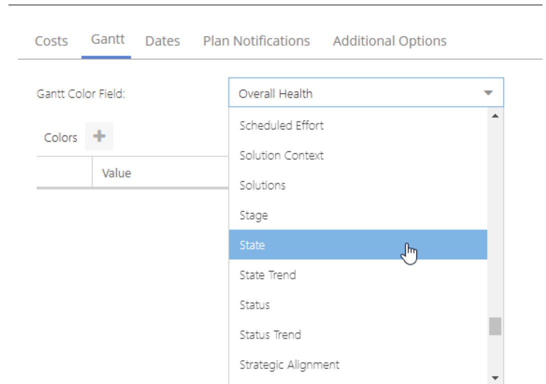
3. Click **Save**, and the new color will be applied to the selected value.



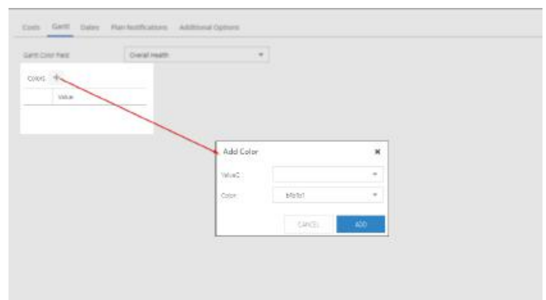
Configure New Color Settings

If you would like to use a different plan field to dictate the color logic of the Portfolio Gantt

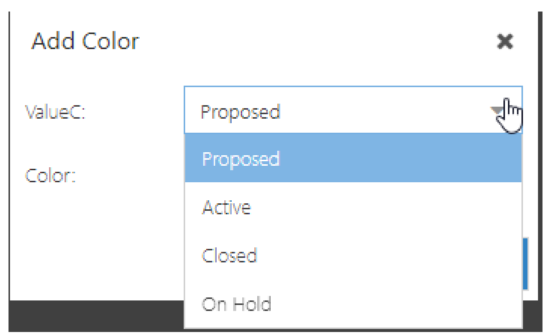
1. **Delete** all of the existing values in the Colors area.
2. Select a new value in the **Gantt Color Field** field. You will want to choose a choice field. In this example, I will select **State**.



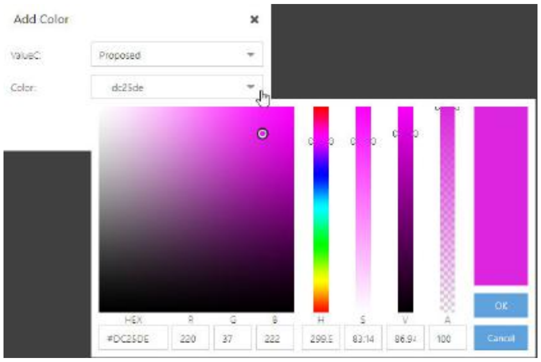
3. Now we need to set up the colors. Click **New Color Option** (+). The **Add Color** form will open.



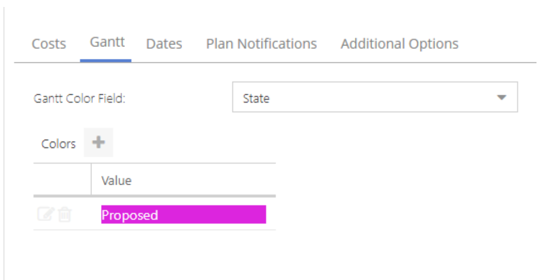
4. Click into the **ValueC** field and select a choice value from the selected **Gantt Color Field**.



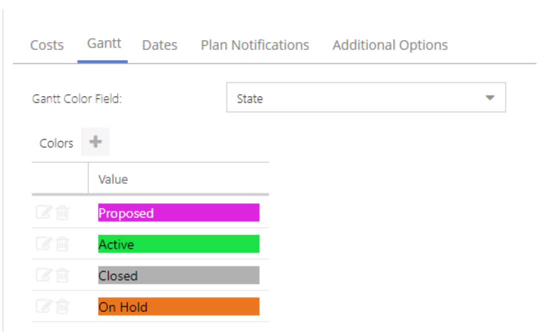
5. Click into the **Color** field, and the color picker will open. Use the color picker to select the new color for the selected value. You can also enter a HEX color code, or RBG values for your desired color. Then click **OK** to apply the new color setting.



6. Click **Add** to create the new color.



7. Repeat this process for all choice options for the selected Gantt Color Field.

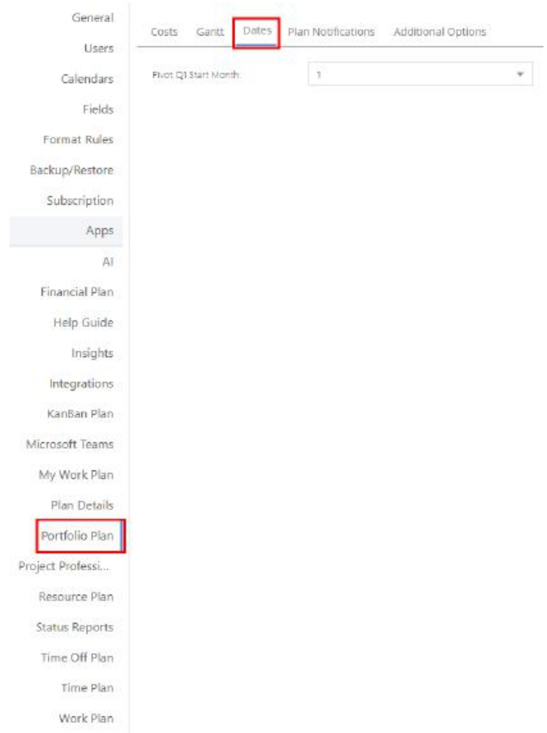


Configure the Portfolio Date Settings

This article explains what the Portfolio Date settings do and how to manage these settings.

Access the Portfolio Plan Date Settings

Go to the Configuration area by clicking on the Settings gear . Then select **Portfolio Plan** from the left navigation, and click on the **Dates** tab.

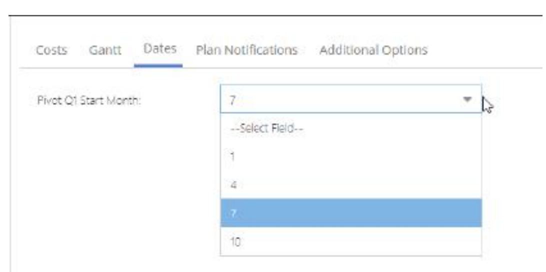


Manage the Dates Settings

There is only one field in the Dates settings area: **Pivot Q1 Start Month**. This setting allows you to select the start month for Q1 in the Portfolio Pivot table. This is applicable if your "year" begins at a different time than January 1, for example.

To update the start month, click into the **Pivot Q1 Start Month**. field, then select from the following options:

- **1** = Q1 starts in January
- **4** = Q1 starts in April
- **7** = Q1 starts in July
- **10** = Q1 starts in October



In this example, I selected 7, meaning Quarter 1 in my Portfolio Pivot table begins in July. When I go to the front end, open up the Portfolio Pivot, and view it in Quarters, you can see that Q1 starts in July.

Set Up the Portfolio Plan Notification Settings

Configure the Portfolio Plan Lock Field and Value

Enable Advanced Portfolio Filtering

This article explains how to enable the Advanced Portfolio Filtering feature released in May 2024.

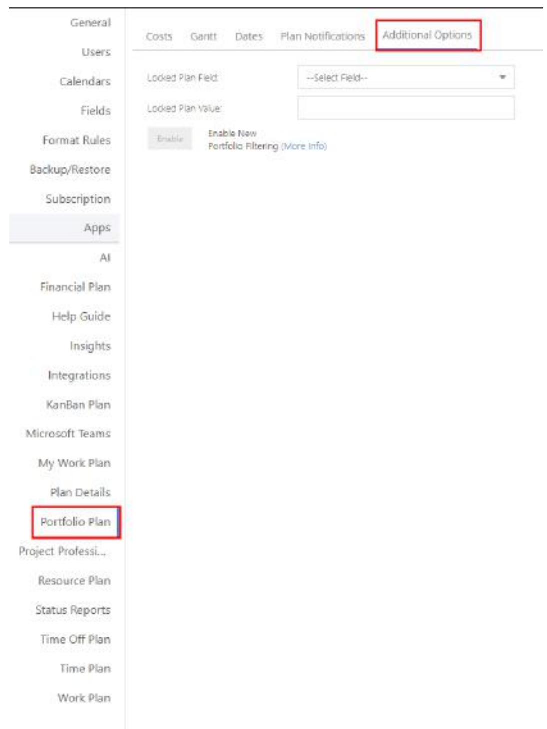
OnePlan released improved Portfolio FIltering capabilities in our May 2024 release. These improvements included a new Portfolio Filtering interface, as well as a Portfolio-level search. If you have a OnePlan environment that was configured before the May 2024 release, the new filtering capabilities will not be turned on automatically, and you will need to enable them. You will know that your group is not using the new filtering capabilities if you see the Legacy Filters warning in the My Portfolio area.

NOTE

Any OnePlan environments created after the May 2024 release will have advanced Portfolio filtering enabled by default.

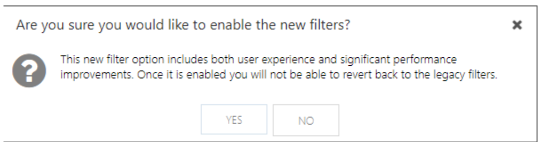
Access the Portfolio Filtering Settings

To access the Configuration area, click on the Settings gear . Then Select **Portfolio Plan** in the left navigation, and click on the **Advanced Options** tab.



Enable Advanced Portfolio Filtering

Simply click the Enable button for the **Enable New Portfolio Filtering** setting. Then confirm that you would like to enable this new functionality.



When you reload the My Portfolio area in the OnePlan front end, you will be able to use the new Portfolio filtering features, including the new filter interface, and Portfolio-level search.

Project Professional App

Mapping Progress Between Microsoft Project Professional to OnePlan

This article explains OnePlan best practices for mapping progress fields between Project Professional and OnePlan.

This article specifically discusses the mappings for the fields **% Done/% Complete** and **Actual/ Timesheet Hours**.

By default, this integration maps progress fields between OnePlan and Project Professional (i.e. **% Done** in OnePlan to **% Complete** in Project). It does not map **Timesheet Hours** (OnePlan) to **Actual Hours** (Project).

This is because the integration only supports mapping either **% Complete** or **Actual Hours** in Project Professional. Not both at the same time.

> **IMPORTANT**
> If users want to map timesheet hours, our product recommendation is to map **Timesheet Hours** (OnePlan) to a custom field in Project Professional, in place of **Actual Hours**.

Alternatively, users can remove the **% Complete** field in Project, and add in the **Actual Hours** field. Then they can map **Timesheet Hours** (OnePlan) to **Actual Hours** (Project).

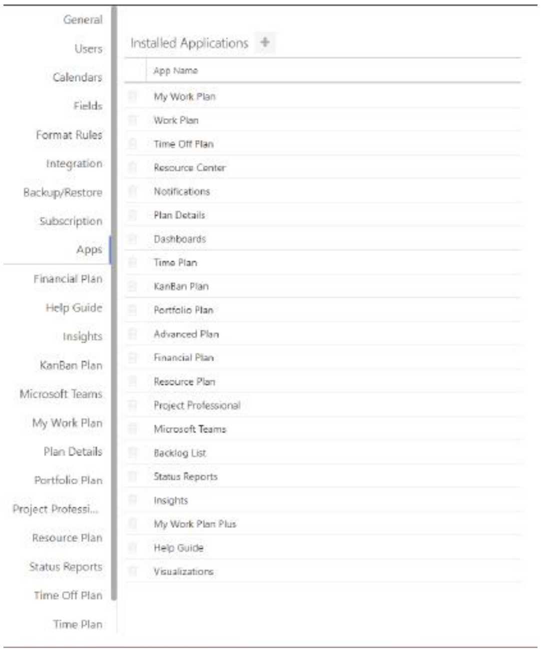
Requests App

Install the Requests App

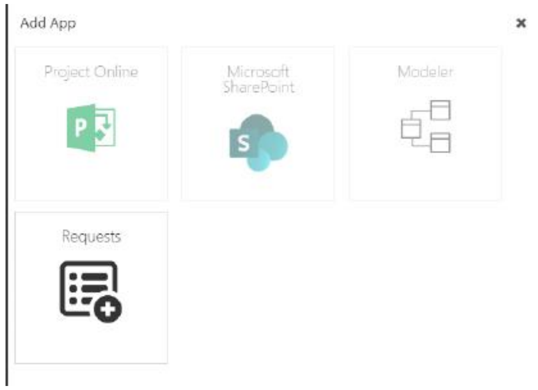
This article explains how to install the Requests app into your OnePlan configuration.

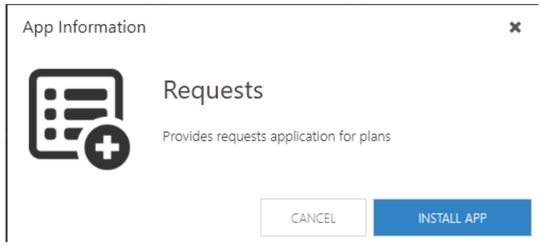
Also see How do I Add Apps to OnePlan? [71] for general guidance on how to install all apps in OnePlan.

1. In the config/admin pages, go to **Apps**. Then click **Add App** +. The **Add App** form will open.

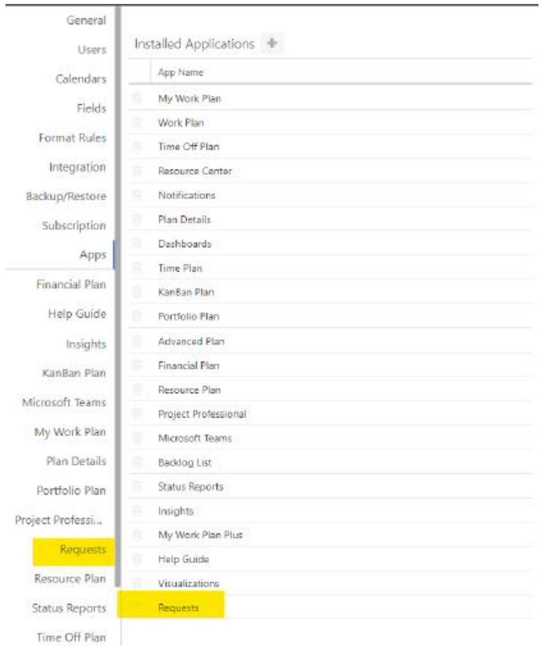


2. Select **Requests**. A confirmation popup will open. Click **Install App** to install the Requests app.





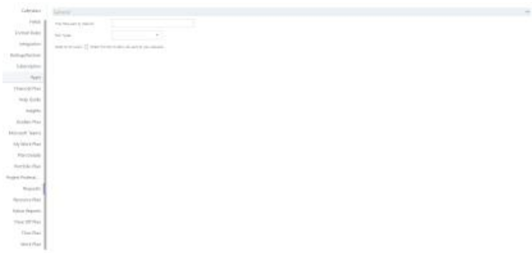
3. The Requests app will now be available in your OnePlan environment. The Requests configuration options will also be available in the config/admin pages. See Configure the Requests App [112] for more information.



Configure the Requests App

This article explains how to configure the Requests app.

You need to install the Requests app before you can access the settings. See Install the Requests App [111].



- **Title**: Enter the title for your requests portal. The title is "Requests" by default.
- **Plan Types**: Select the plan types that will be used to create new requests.
- **Open to All Users**: Check this box to allow all users to view requests.

Configure Plan Type Conversions

The process step of a request can be used to trigger the creation of a related plan in your portfolio. You can also choose to manual promote a request into your portfolio (for example, you can convert a idea into a project).

See to set up plan type conversions.

Resource Plan App

Cost Type Settings

On the Resource Plan settings page, expand the **Types** topic heading.

> **NOTE**
> The Cost Types page shows on both the Financial Plan and Resource Plan settings pages, regardless whether some cost types are only for financial or resource planning (or both).

Cost types allow organizations to calculate, evaluate and monitor how resources are being allocated. There are possible (and often likely) differences between how your resources' time is initially planned, booked onto specific work, and then actually spent. The Resource Plan allows multiple cost types so organizations may analyze the differences. When multiple cost types are built, users 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. Here are some example use cases that may apply, for reference.

- The **Committed Hours** cost types 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 work/tasks 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.

Add a New Cost Type

1. Click the Add Type (+) button.
2. Complete the Add Type form.
   - **Name**: Enter the name of the cost type.
   - **Method**: Select None, Even, or Total of Cost Type.
   - **Resource Total Field**: If a method is selected as "Even" or "Total of Cost Type," Field will show. Select the plan-level field to where the total sum value or even distribution from this cost type will populate.
   - **Multiplier**: Multiply all values by a common multiple. i.e. "1000" if all values are to be 1000x whatever is entered. So, typing 1000 would really be 1,000,000.
   - **Read Only**: Select the check box if data is imported/synced from another system via integration, or only imported from elsewhere.
   - **Status Date**: As applicable, select a date. Data entries from before the set date in all resource plans across all plans for the given cost type will be locked for editing. For example, if it is mid 2019 and all resource plan hours have been approved through July 2019, enter 7/31/2019. Everything through July will be locked/un-editable. August 2019 and forward will still be editable.
   - **Lock Field**: Select an applicable yes/no plan-level field that will be used for locking the cost type, if needed. This method will only lock the resource plan for the given plan and cost type. This setting can be used in conjunction with the Calculations settings to create automations. For example, you can create a calculation for the plan that if State = Closed, then [the selected Lock Field] = true, thus locking the resource plan.
   - **Available Apps**: Select whether the cost type should show in the Financial Plan, Resource Plan, or both.
   - **Import From:** Select the source for import, if applicable. Options include:

- None
- Resource Planner (*[Cost Type]*): Allows users to import from one resource plan type to another (for example, scheduled, to committed).
- Timesheets: Allows users to import resource plan data from the Timesheets type.
- Resource Schedule: Allows users to import resource plan data from the Resource Schedule type. Includes all users who the plan is shared with.
- Resource Schedule (Assignments): Allows users to import resource plan data from the Resource Schedule type, but only includes users assigned tasks in the schedule.

- **Status Date Lock:** Check the check box to prevent import of data from resource plans prior to the set Status Date.
- **Auto Import:***Available when **Import From** is set to **Resource Schedule** or **Timesheets**.* Check the check box to auto import the cost type to the set location.

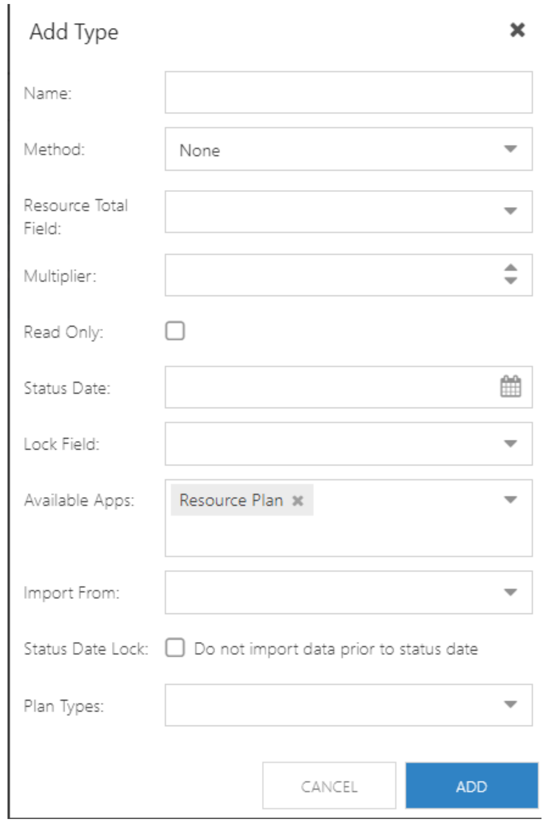
NOTE

For **Auto Import** to function, you must setup the **Cost Type Import** schedule. See Enable automatic cost imports for instructions.

NOTE

Resource Schedule imports update in real time when the Auto Import box is checked. You do not need the Cost Type Import schedule set for this function to work.

- **Plan Types:** Select which plan types the cost type will apply to.



Manage Cost Types

- **Edit** - Open the Type form to edit the settings for the cost type.
- **Delete** - Delete the cost type.

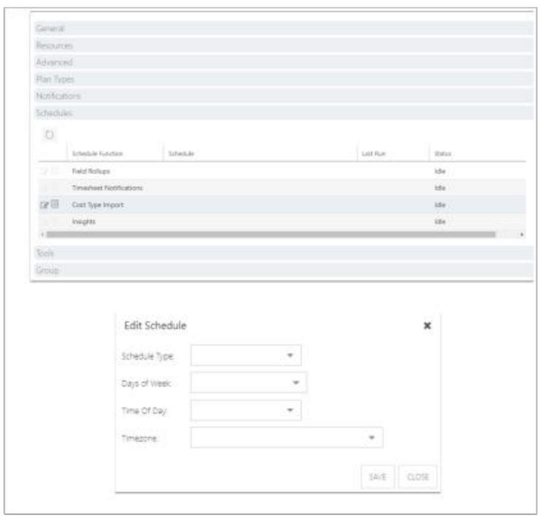
Selecting Delete will delete all data in the cost type.

Enable Automatic Cost Imports

To enable automatic cost imports:

1. Go to the Admin pages, select **General** in the navigation. Then, expand the **Schedules** topic heading.

2. Select the **Edit** icon for the schedule function **Cost Type Import**. The **Edit Schedule** form will open.
3. Complete the **Edit Schedule** form:
   - **Schedule Type:** Select the type of schedule to run the Cost Type Import function. Options are **Daily** and **Monthly**.
   - **Days of Week:** Select which day(s) of the week to run the Cost Type Import function.
   - **Time of Day:** Select the time of day to run the Cost Type Import function.
   - **Timezone:** Select the timezone where the function schedule will run.
4. Select **Save**. Cost type imports will now automatically run on the schedule you have set.



Resource Plan Custom Fields Settings

On the Resource Plan settings page, expand the **Custom Fields** topic heading.

Use this feature to create custom fields in the Resource plan.

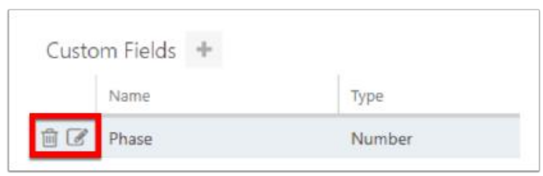
Add a Custom Field

1. Click the Add Custom Field (+) button.
2. Complete the Add Field form.
   - **Field Name:** Enter the name of the field.
   - **Field Type:** Select the type of field - Text, Date, Number, Currency, Yes/No, Choice, User
   - **Required:** Select the check box to make the field required.
   - **Read Only:** Select the check box to make the field read only.
3. Click **SAVE.**

Manage Custom Fields

Edit - Open the Field form to edit the settings for the field.

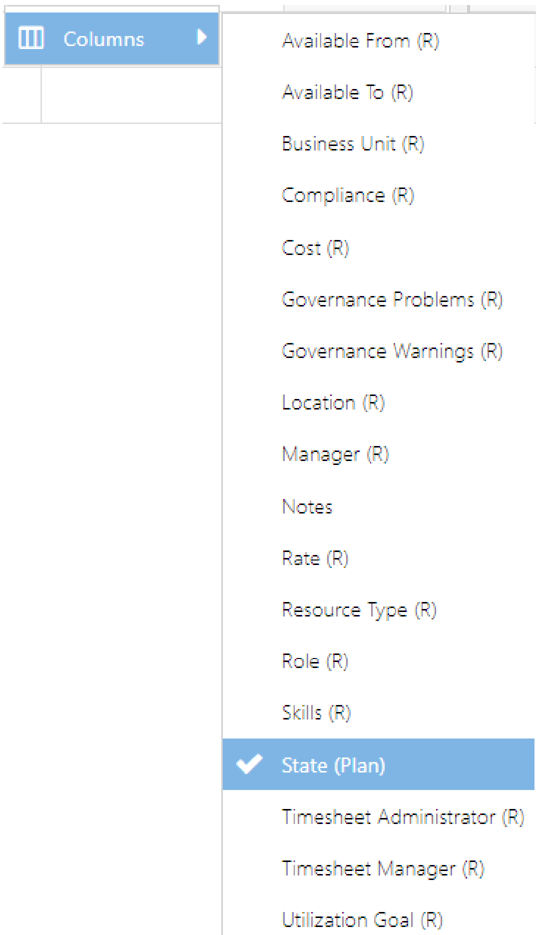
Delete - Delete the field.



Select Plan-Level Fields

Plan level fields are available to be viewed, filtered, and sorted in the resource planner. This allows users to view data regarding a given plan without having to open up Plan Details or go to the plan itself. For example, you may want to allow the plan State field to display in the resource plan.

Select the desired plan-level fields from the **Extra Plan Fields** drop down. These fields will be available for users to add into their resource plan views.



Advanced Resource Plan Settings

On the Resource Plan settings page, expand the **Advanced** topic heading.

Setting	Description
Capacity Month Range	You can control how far in the past and future capacity will be calculated for in the OData reporting feed (5 years maximum although 2 years or less are recommended for better performance of the OData feed). The amount of months selected will start from the current month.
FTE Hours	If this setting is blank, your default calendars hours per day will be used for FTE to hours conversions. If you update this new setting, the value entered will be used for FTE conversions going forward.
Pre-Filters	See Pre-Filters [116] for details.
Enable Private/ Public Entries	When this feature is enabled, each row added to the resource plan will be private. Private rows do not show in reports, do not show on the All Plans Resource Plan page, and do not get imported into the Financial Planner. Users can change an individual row to public or can quickly change all rows to public at once using the Make Public button in the resource planner.
Match Field	Select the method for matching named resources with generic resources. Default is Role. Options include Business Unit, or Role.
External ID Field	

Pre-Filters

Pre-filters narrow the number of resources loaded into in the Resource Plan, showing users only the kinds of resources they want and improving query performance.

Add a Pre-Filter

1. Click the Add Pre-Filter (+) button.
2. Complete the Add Filter form.
   - **Field:** Select the field used to filter resources. Options include:
     - Business Unit
     - Location
     - Manager
     - Resource Type
     - Role
     - Timesheet Administrator
     - Timesheet Manager
     - Generic
   - **Required:** Select the check box to make the pre-filter required.
   - **Max Items:** Enter the maximum number of items returned in a query. There is no limit for maximum number of items returned. Fewer items returned in a query will help improve performance.
3. Click **ADD.**

OnePlan

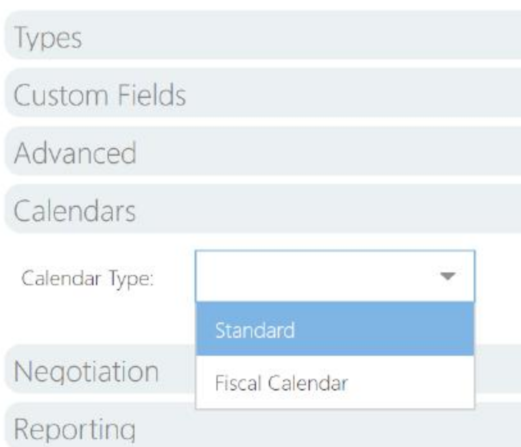
Resource Plan Calendar Settings

This article explains the calendar settings for the Resource Planner.

To access the Resource Plan calendar settings, go to the Admin pages > **Resource Plan** > **Calendars**.

Click on the **Calendar Type** drop-down and select the type of calendar you would like to use in your Resource Planner. Options include:

- Standard
- Fiscal Calendar



How do I set up Negotiations?

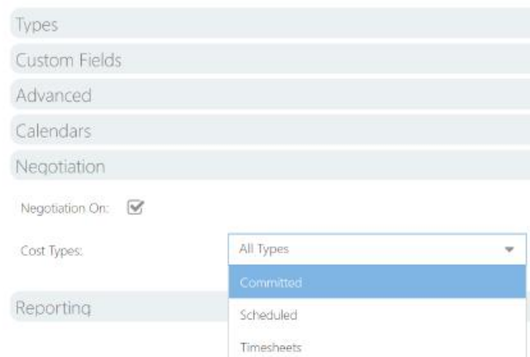
This article explains how to configure Resource Negotiations for OnePlan. This requires the app 'Resource Plan' to be installed.

Go to the Admin pages, select **Resource Plan**, and expand the **Negotiation** topic heading.

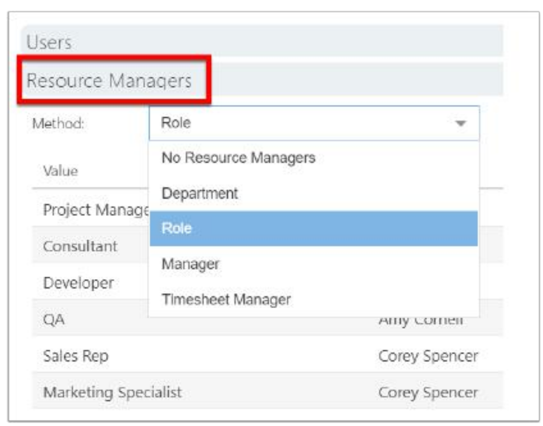
This is an advanced OnePlan feature called Negotiations. If enabled, both the Plan Owner (for the plan) and the Resource Manager (for each resource) would both need to agree on the resource allocation in order for the Resource Plan row to change from draft to proposed to committed.

1. Enable Negotiations

1. Check the **Negotiation On** checkbox to enable resource negotiations.
2. From the **Cost Type** drop-down, elect the cost type for resource negotiations. Default is **All Types**. Options include **Committed**, **Scheduled**, or **Timesheets**.



2. Set Resource Managers



Navigate to the Users Admin page. Expand the Resource Managers heading.

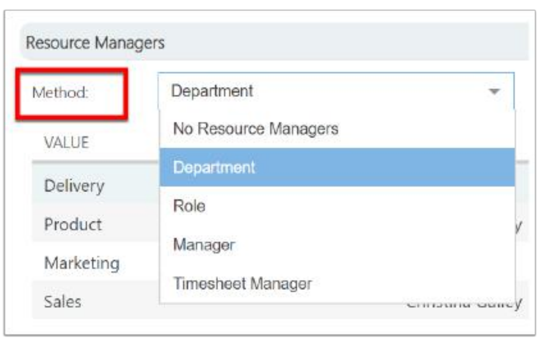
2.1. Select Method

Method: Select No Resource Managers, Department, Role, Manager, Timesheet Manager, or another resource-level field. Note: Timesheet Manager only shows if the Timesheets App has been added.

Based on the selection here, the resource manager will be the user who reviews and approves resource plan allocations. This applies only when the Resource Negotiations are enabled. When Negotiations are disabled, select No Resource Managers as the method.

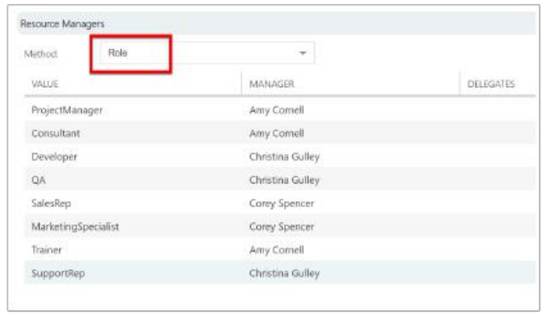
If you select Manager or Timesheet Manager as the method, the field values from each resource's form will be the resource manager. If you select Department or Role, follow the next steps to designate managers and delegates.

- No Resource Manager
- Department - Enter manager for each department
- Role - Enter manager for each role
- Manager - Resource-level field
- Timesheet Manager - Resource-level field (if Timesheet app installed)
- Other Resource-level fields will show for selection, if applicable



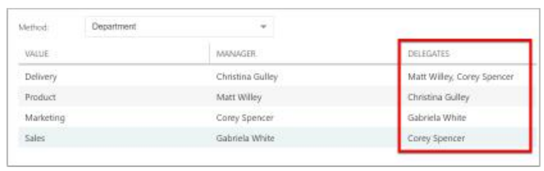
2.2. Designate the Manager

If you select Department or Role, a table with the configured departments or roles shows. Departments and Roles are both configured on the Fields admin page, under the Resource topic heading. Designate the one manager for each department or role, based on method selected.



2.3. Designate Delegates

Designate the delegates (multiple allowed) for each department or role, based on method selected. These are the default delegates for each department or role. Each manager will also be able to change the delegates (on the Resource Plan page) for any groups that they are the designated manager.



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.

How do I set up PowerBI report in the Resource Planner?

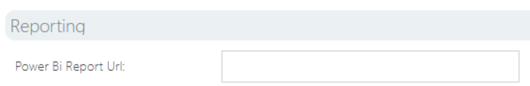
This article explains how to set up PowerBI reports for the Resourec Planner.

This requires the Resource Plan app to be installed. See How do I Add Apps to OnePlan? [71] for more information.

Reporting Settings

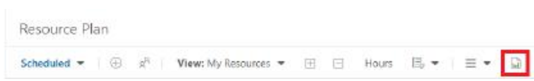
On the Resource Plan settings page, expand the **Reporting** topic heading.

Link to a Power BI Report by entering the Report URL in the field.



Access the Report in the Resource Plan

1. Navigate back to the resource plan.
2. Click the new Dashboard icon in the header to open the Power BI report. Login to Power BI if prompted.



Status Reports App

Install and schedule Status Reports

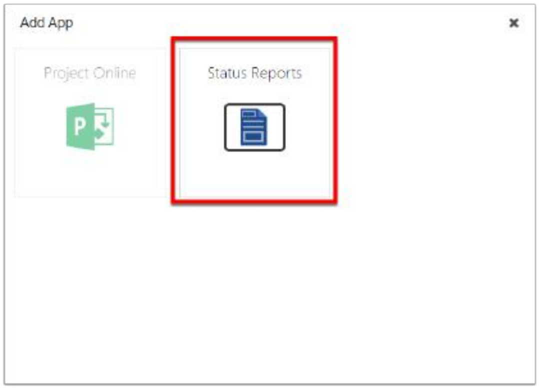
This article explains how to install and configure the Status Reports in OnePlan, which allows for the creation of plan status reports that can be submitted & printed to PDF. The app also allows for saving snapshots, which will create the ability to see trends in the data.

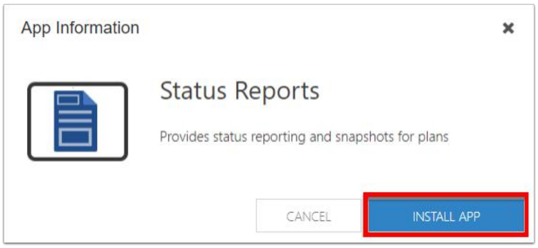
Navigate to the Admin Pages. After the app is added, select the new Status Reports heading in the admin navigation.

Install the Status Reports App

Install the app Status Reports. If you need information how to install an app in OnePlan, refer to How do I add apps? [71]

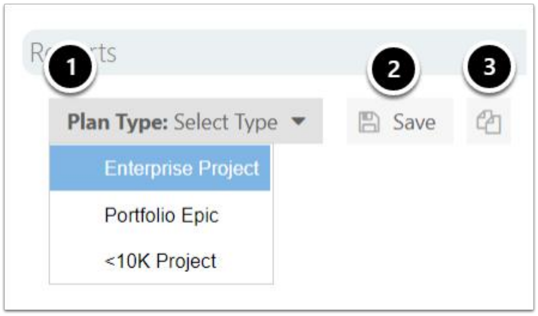
After the app is installed, a new settings section called Status Reports will appear in the admin navigation.





Status Report Settings

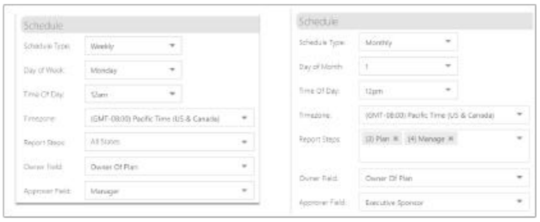
1. First, select a **Plan Type**. Then, the settings sections will appear.
2. Any changes that are made on the Status Report settings and/or form must be saved using the **Save** button.
3. If/as needed, you may use the **Copy** button to copy the status report settings from one plan type to another.



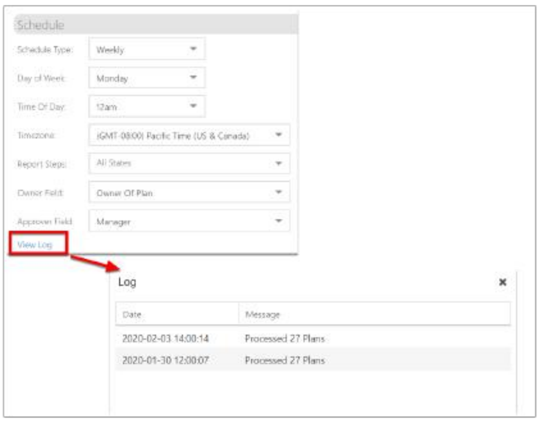
Expand Schedule

Schedule Settings

- **Schedule Type:** Select Weekly or Monthly
- **Day of Week:** If weekly, select day of week to run. If monthly, select day of month.
- **Time of Day**
- **Timezone**
- **Report Steps:** Select which process steps to run the status reports. The process steps align to the plan type selected above.
- **Owner Field:** Select a plan-level user field. The owner is the user who sees the report on the Status Reports page, and is the one who submits the status report.
- **Approver Field:** Select a plan-level user field. The approver is the user who will receive an email and needs to approve or reject the status report.



Click the **View Log** link to view the log of report dates & number of plan reports processed.

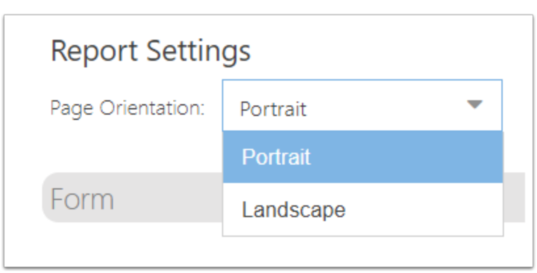


Snapshot Settings

- Snapshot Fields: Select the fields you would like to snapshot during this status report period. These fields can be used in trends analysis.
- Snapshot Method: Select to have the snapshot fields save on report creation or on report submission.

Report Settings

Page Orientation: Select portrait or landscape. This is for viewing the form and the export/print to PDF.



How do I manage the Status Reports display settings?

This article explains how to configure the Status Reports in OnePlan. You must first install the Status Reports app and configure the schedule.

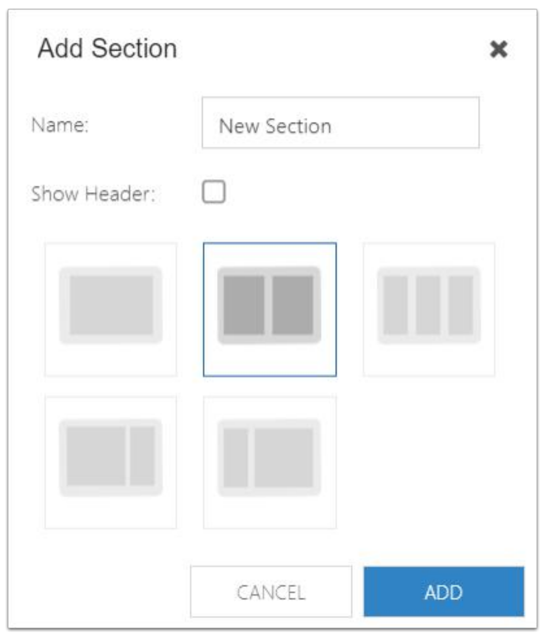
Navigate to the Admin pages, select Status Reports in the navigation. Then, expand the Form topic heading.

Expand Form Heading to Build out the Status Report Form

The method for building out the Status Report form is similar to how to build out the Plan Details form. For additional information, see Set up plan detail form layouts [97].

Add section(s) to the form.

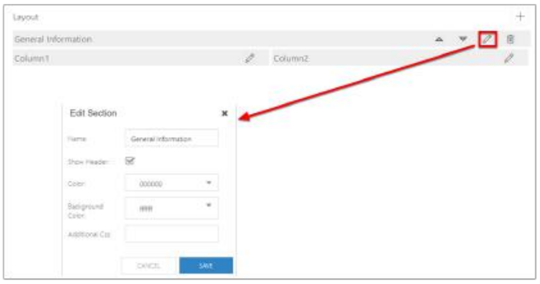
- Name the section.
- Select the check box to show the header (the section name).
- Select the number of columns.



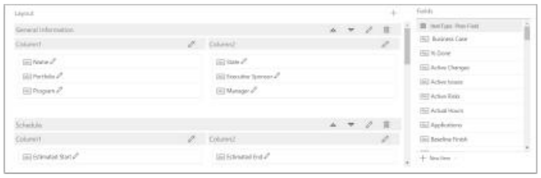
Modify the sections and columns as needed.

- Move sections up & down using the arrow icons.
- Click the Pencil icon to open the Edit Section/ Column window. Update the name, select to show the header, update colors, and add additional Css (if needed).

- Click the Save button.



Add fields to the sections. There are Plan Fields, Report Fields (which are the Status Report dates), and Summary Fields.

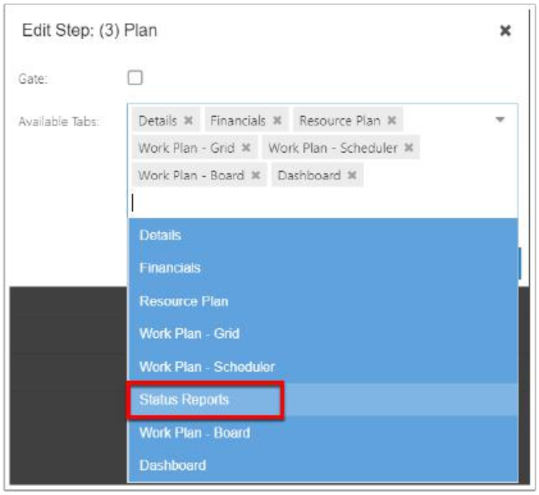


Show Status Reports on the Plan Navigation

Navigate to the Plan Details page.

Based on which process steps and which plan types you have configured the status reports to run, go to the Plan Details page for that/those plan type(s). Select a plan type. Under the Process Flow heading, select the applicable flow steps to show Status Reports tab in the plan navigation.

Be sure to click the Save button to save your changes.



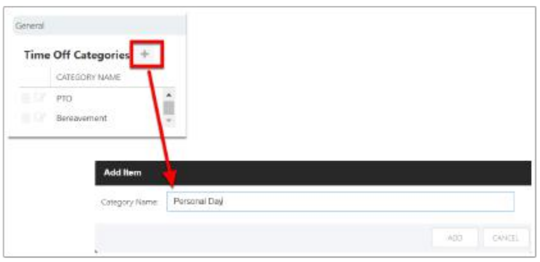
Time Off Plan App

How do I set up Time Off ?

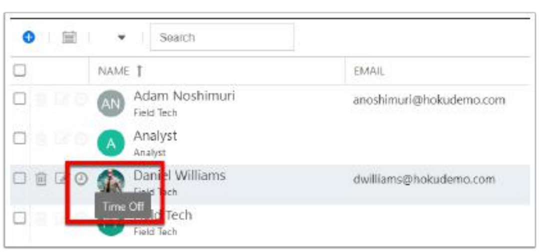
This article explains how to manage the time off categories in OnePlan. Time Off entries affect the remaining availability for resources. This is used for resource planning.

Go to the Admin pages, select Time Off Plan in the navigation.

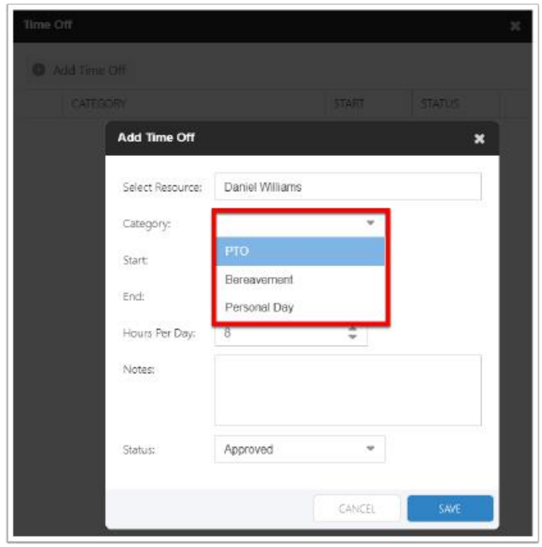
Add Time Off Categories



Click the (+) icon to add a new time off category. Enter the name of the category. Common examples include PTO, Bereavement, Personal Day, Medical, etc. Click Add.



When the Time Off categories have been added, users will be able to enter Time Off requests.



Time Plan App

Create and Manage Timesheet Fields

This article explains how to create and manage timesheet-level fields for OnePlan. This requires the app 'Time Plan' is installed.

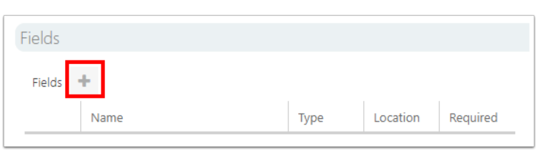
Go to the Admin pages, select Time Plan in the navigation.

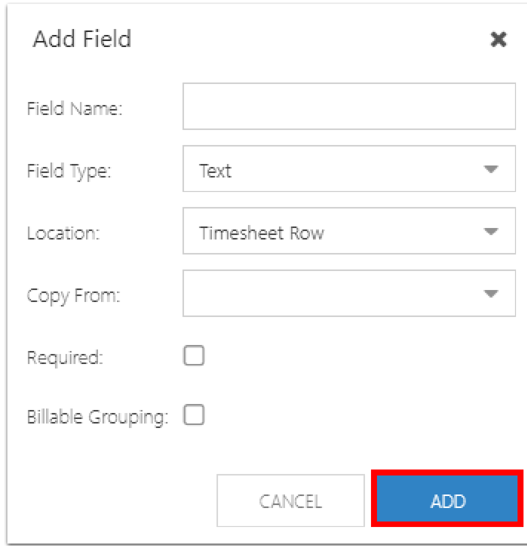
Add Field

Expand the Fields topics heading.

To create a new custom timesheet field:

1. Click the **Add Field** icon (+). The **Add Field** form will open.
2. Complete the **Add Field** form.
   - **Field Name:** Enter the name of the new field.
   - **Field Type:** Select the type of field from the dropdown. Options include Text, Date, Number, Currency, YesNo, Choice, User.
   - **Location:** Select where the new field will be displayed. Options include Timesheet Row or Timesheet Entry. See Timesheet Row FIeld [124] or Timesheet Entry Field [124]
   - **Copy From:** If applicable, select a task-level field to copy the value to the timesheet row. The user can then make a change to the value in the timesheet.
   - **Required:** Check the check box if users must enter a value for every timesheet entry.
   - **Billable Grouping:** Check the check box if the new field will be used for the Total section at the top of the timesheet entry page, and for the utilization graph. For more about the billable settings: How do I manage the timesheet billable settings? [126]
3. Click **ADD** to create a new field.



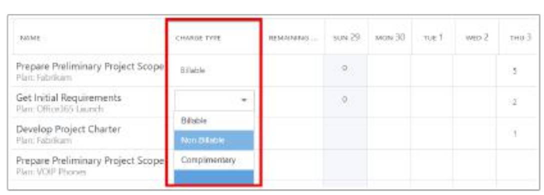


You can edit a timesheet field, but the field type and location options are not editable after you've initially created the field.

Timesheet Row Field

A Timesheet Row field shows on the left side, as a column. The value is entered once per timesheet row.

If needed, an item can be added to a timesheet twice. For example, if a user is tracking time on a task for the assigned number of hours as billable, but then goes over, they can add the same task a second time and the hours for the second row can be tracked as non-billable.



Timesheet Entry Field

A Timesheet Entry field shows the field value for each timesheet entry, so values could be different for each day/entry.

It is advisable to use a single field & type for billable/chargeable. This article shows two examples - as a timesheet row field and timesheet entry field. You should choose one method or the other so as not to be confusing or cause data discrepancies.

Create and Manage Timesheet Periods

This article explains how to create and manage timesheet periods for OnePlan. This requires the app 'Time Plan' is installed.

Go to the Admin pages, select Time Plan in the navigation.

Add Timesheet Periods

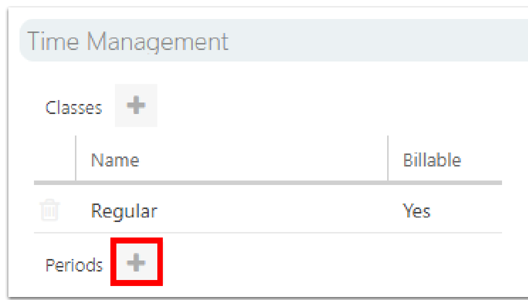
When the Time Plan app is installed, the Timesheets feature is nearly ready to begin using. At minimum, you must add timesheet periods. You may add them as single periods or bulk add. Be sure to create periods carefully as you go.

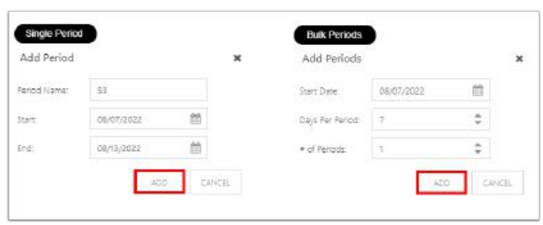
Do not create too many periods out in the future, as users will see the periods in the drop down for navigating and adding time. If you do create periods far out in the future, perhaps lock those periods so users can add time too far out in the future.

It is advised to INCLUDE weekend days in your periods. There is another separate Timesheet setting where you may allow/disallow time to be tracked on weekends. This way, if your organization changes its mind to allow in the future, the periods will not need to be deleted one-by-one and recreated.

To add a time period:

1. Click the Add Period icon (+).
2. Select the type of period to add from the dropdown. Select **Single** or **Bulk**.
3. The Add Period form will pop up. Complete the form.
   - Add a Single Period:
     - **Period Name:** Enter the name of the time period.
     - **Start:** Select the start date of the time period.
     - **End:** Select the end date of the time period.
   - Add Bulk Periods:
     - **Start Date:** Select the start date for the periods.
     - **Days Per Period:** Enter the number of days in each period.
     - **# of Periods:** Enter the number of periods.
4. Click **ADD**.

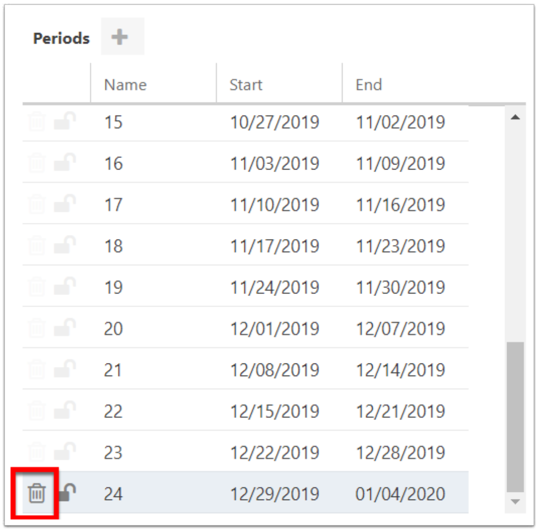


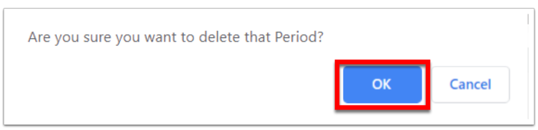


Delete Periods

Timesheet periods cannot be edited. If needed, they can be deleted one at a time. Only the last timesheet period can be deleted. If you made a mistake in your creation or need to make a change, you may need to delete the last period. It is advisable to NOT delete periods with data, unless it was for training or testing purposes.

An example to delete a period could be at year's end, to have a shorter period so the year's data is contained. Delete the last period and create a single new period with the desired dates to finish at the end of the year.





Lock/Unlock Periods

Select a period to lock or unlock it. When periods are unlocked, the icon will show as an unlocked/ open padlock. When locked, the icon will show as a locked/closed padlock.

When time for a specific period has been reviewed and/or approved, locking that period will prevent any changes be made to time. For example, once month-end review and invoicing for the previous month has been done, lock the previous month's timesheet periods.

Another example when to lock periods is if you have bulk added periods in the future, but don't want users to add time to future periods yet. You may lock the future periods.

Locked periods DO NOT show on the periods drop down.

Manage Timesheet Billable Settings

This article explains how to configure the timesheet settings for billing purposes for OnePlan. This requires the app 'Time Plan' is installed.

Go to the Admin pages, select Time Plan in the navigation.

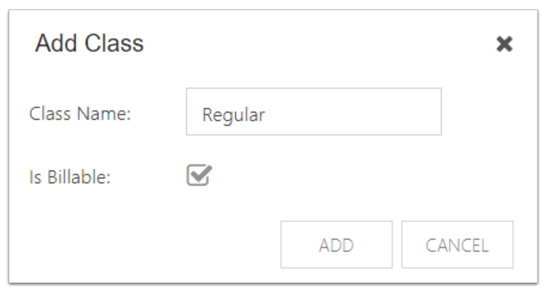
Set Time Class as Billable

There needs to be at least one time class. We recommend only having one time class.

NOTE: If you want to be able to distinguish different types of hours, a better approach is to have a Add Timesheet Field for Billable Grouping [126]Timesheet field for users to specify at the row or entry level. See Add Timesheet Field for Billable Grouping.

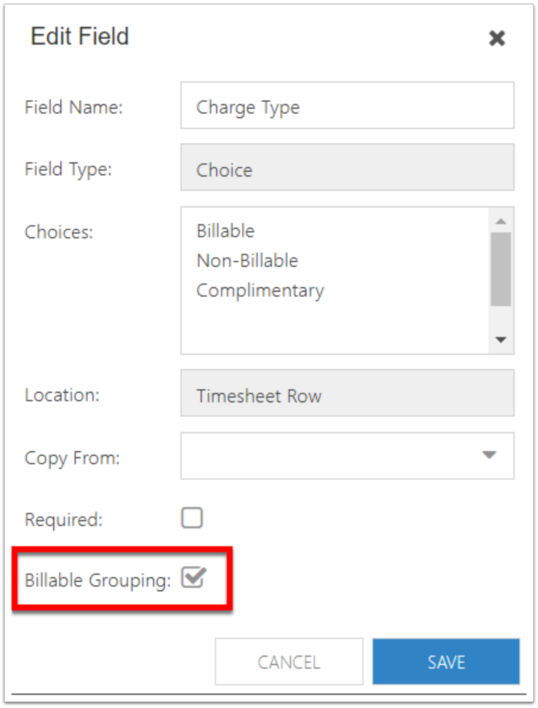
1. Create a time class. See **Add a Class** in Manage the Timesheet settings [127].
2. Select the check box for **Is Billable**.

Only time class(es) that are marked as Is Billable will count toward the Utilization graph. This is used whether or not a timesheet choice field for distinguishing which hours are billable or not.



Add Timesheet Field for Billable Grouping

1. Create a field. See Create and Manage Timesheet Fields [124].
2. In the Add Field form, set **Location** to **Timesheet Row**.
3. Check the check box for **Billable Grouping**. The Billable Grouping shows the breakdown of hours for each choice value at the top of the Timesheet.

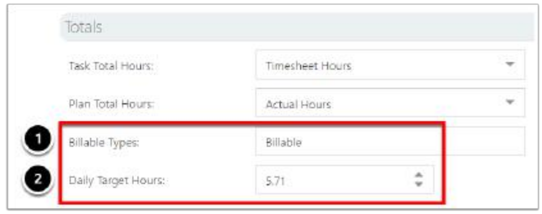


Specify Billable Types & Daily Target Hours

Edit the timesheet Totals settings to specify billable types and daily target hours. See **Totals** in Manage the Timesheet settings [127].

1. Enter the choice value(s) that should be counted as billable, which will drive the Utilization graph.
2. Enter the number of target hours that would be 100% on the Utilization graph.

Note regarding Daily Target Hours. If the setting under Time Rules allows work on weekends, the total daily target will also count for weekend days. If your organization is a typical 8 hours per working day (i.e. 40 hours per week), enter your **Daily Target Hours** as **5.71**. If you do not allow hours on weekends, enter your **Daily Target Hours** as **8**. If your target is less than 40 hours per week, use the following calculation for your Daily Target Hours: (Number of Weekly Target Hours)/(Number of Allowed Working Days per Week).



Manage the Timesheet Settings

This article explains how to configure the timesheet settings for OnePlan. This requires the app 'Time Plan' is installed.

Go to the Admin pages, select Time Plan in the navigation.

Time management

Expand the **Time Management** topic heading.

In the Time Management topic heading, you can configure time classes and time periods for your timesheets.

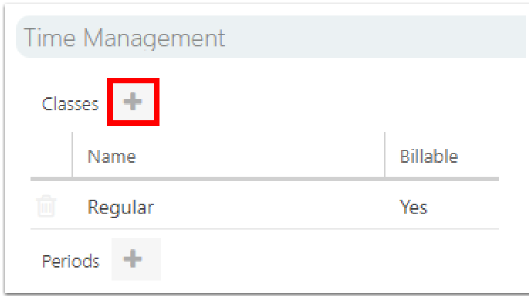
Add a Class

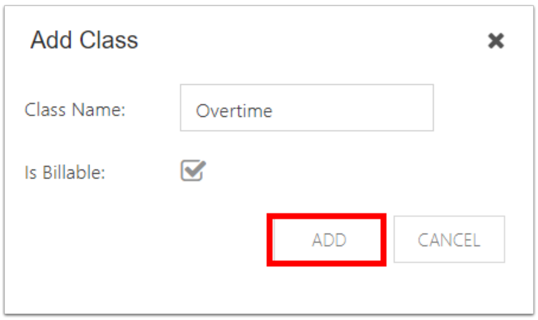
By default, all time goes into one class: **Regular**. If required, you can create multiple time classes. Once configured, the time classes are visible in the timesheet.

The alternative to timesheet class types would be to use Timesheet Fields. See Create and Manage Timesheet Fields. [124]

To add a time class:

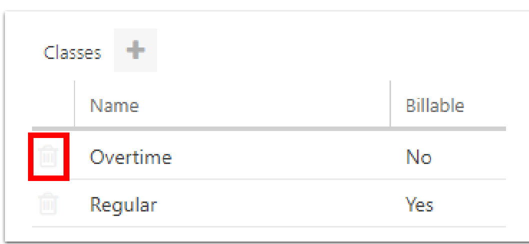
1. Click the Add Class icon (+).
2. The Add Class form will pop up. Complete the form.
   - **Class Name:** Enter the name of your new time class, such as "Overtime".
   - **Is Billable:** Check the check box if time recorded in this new time class is billable.
3. Click **ADD**.
4. In the timesheet, the new time class should be visible for each class will show for each day in the timesheet period.





Remove a Class

To remove a time class, click on the **Remove** icon.



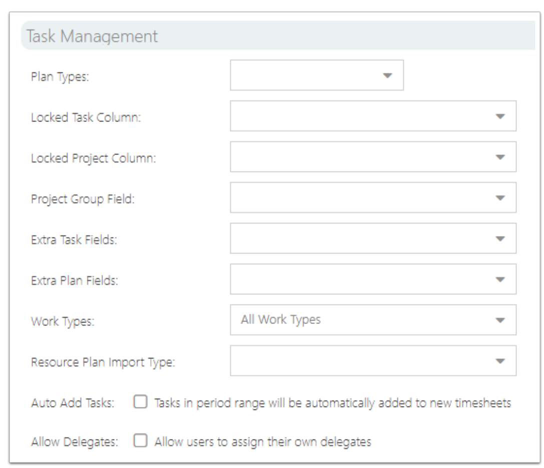
Periods

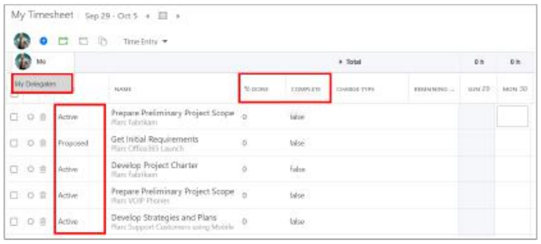
See Create and Manage Timesheet Periods [125] for instructions and details for creating and managing timesheet periods.

Task Management

Expand the Task Management topic heading. Make selections for the following, if applicable.

- **Plan Types:** Select plan types to pull tasks from in the timesheet.
- **Locked Task Column**: Select a Yes/No task-level field. When that field is set to yes, the task will be locked in the timesheet.
- **Locked Plan Column**: Select a Yes/No plan-level field. When that field is set to yes, the plan (& all tasks for that plan) will be locked in the timesheet.
- **Project Group Field**: Select a project-level field to show as an additional column in the timesheet.
- **Extra Task Fields**: Select one or more task-level fields to show in the timesheet. These are for reference (read-only) purposes only.
- **Extra Plan Fields:** Select one or more plan-level fields to show in the timesheet. These are for reference (read-only) purposes only.
- **Work Types:** Select one or more work types to allow in the timesheet. Default is All Work Types.
- **Resource Plan Import Type:** Select a cost type from the drop down. Use this field if you are not using the work planner to assign tasks. This allows users to import plans into their timesheet if they are in the plan's resource plan.
- **Auto Add Tasks:** Check the check box to automatically add tasks in a period range to new timesheets.
- **Allow Delegates**: Check the check box to allow users to assign their own delegates. When allowed, a user can open the My Delegates window to assign user(s) as entry & approval delegates.





Totals

Expand the **Totals** topic heading. Make selections for the following, if applicable.

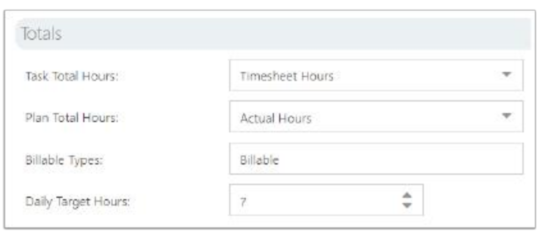
- **Task Total Hours**: Select a task-level field where the total hours for a task will show on the schedule pages.

> **NOTE**
> Task Total hours must use a number field.

- **Plan Total Hours**: Select a plan-level field where the total hours for a plan will show on the plan details page, portfolios page, etc.

> **NOTE**
> Plan Total hours must use a number field.

- **Billable Types**: Enter one or more field values for which hours are to be counted toward the utilization percentage graph. For more information about configuring the billable settings together see Manage Timesheet Billable Settings. [126]
- **Daily Target Hours**: This number is the basis for 100% on the Utilization graph on the timesheets entry page.
  NOTE: The Utilization graph can go over 100%.

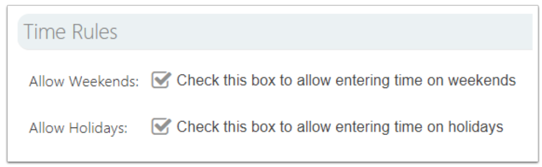


Plan Total Hours

Time rules

Expand the Time Rules topics heading. Make selections for the following, if applicable.

- **Allow Weekends**: Check the check box to allow users to enter time on weekends (Saturdays & Sundays).
- **Allow Holidays**: Check the check box to allow users to enter time on holidays (holidays are managed on the Calendars page: How do I manage the calendar? [42]).



Enable Classes

Enable classes to set different timesheet rules for different resource classes, such as full time and part time employees.

If there are timesheet classes enabled, a resource-level class field shows in the Resource Center. Each resource would need to be associated to a class in the Resource Center. See How do I edit a resource? [31] Then, the specified warnings and/or blocks will apply to that class of resource when submitting time in their timesheets.

NOTE: If no timesheet classes are configured, the timesheet rules apply to all resources.

To enable and create timesheet classes:

1. Click **Enable Classes**. Select **YES** in the warning pop up to continue.
2. Click **Add Class** to add a timesheet class.
3. Enter the class name and details.
   - **Class:** Type in the name of the new class.

- **Daily Soft Min:** Enter the minimum number of hours to be entered in per day. The soft minimum give users a warning when submitting a timesheet with fewer hours than prescribed here.
- **Daily Hard Min:** Enter the minimum number of hours to be entered in per day. The hard minimum blocks users from submitting a timesheet with fewer hours than prescribed here.
- **Daily Soft Max:** Enter the minimum number of hours to be entered in per day. The soft maximum gives users a warning when submitting a timesheet with more hours than prescribed here.
- **Daily Hard Max:** Enter the maximum number of hours to be entered in per day. The hard maximum blocks users from submitting a timesheet with more hours than prescribed here.
- **Period Averaging:** Check the check box to take the daily working day hourly averages (per period).
- **Daily Utilization Target:** Enter the target/ ideal number of hours to be entered per day.

4. Repeat steps 2-3 to create as many classes as required.
5. Click **Save** to save the classes.

Fields

See Create and Manage Timesheet Fields [124] for instructions and details on creating and managing timesheet fields.

Workflow

See Manage Timesheet Approvals Workflows [130] for instructions and details on workflow approvals settings.

Reporting

Expand the Reporting topics heading. Add a link to a Power BI report directly into the timesheet. Paste the URL to the desired Power BI report into the **Power BI Report URL** field.

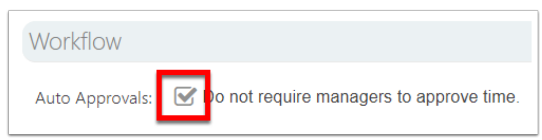
Manage Timesheet Approvals Workflows

This article explains how to configure the timesheet approvals for OnePlan. This requires the app 'Time Plan' is installed.

Go to the Admin pages, select Time Plan in the navigation. Then, expand the Workflow topic heading.

Auto Approvals

Select the check box to have timesheet submittals auto-approved. The system will NOT require managers to approve the time. Time will be totalled at the plan and task level as soon as the user submits the timesheet row.



Manage Workflows for Approval

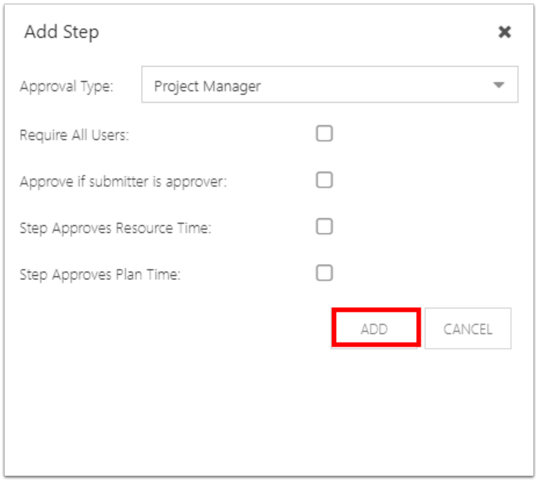
To use approvals, be sure the Auto Approvals check box is unselected.

To create a new workflow step:

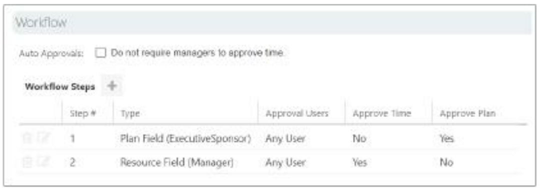
1. Click the Add Step icon (+). The Add Step form will open.
2. Complete the Add Step form.
   - **Approval Type:** Select the approval type from the dropdown. Options include Project Manager, Specific Users, Plan Field, Resource Field, Department Manager.
     - **Plan Owner** ("Project Manager"): Any users on the plan team with Owner permissions can approve.

    - **Specific Users**: You will be prompted for the name of the user(s) who approve time.
    - **Plan Field**: You will be prompted to select a plan-level user field (i.e. Project Manager, Executive Sponsor, etc.).
    - **Resource Field**: You will be prompted to select a plan-level user field (i.e. Manager, Timesheet Manager, etc.).
    - **Department Manager**:
- **Require All Users:** Check the check box if the workflow step is required for all users in your organization.
- **Approve if submitter is approver:** Check the check box to have a timesheet automatically approved when an approver submits their timesheet.
- **Step Approves Resource Time:** Check the check box if approval of the workflow step approves resource time.
- **Step Approves Plan Time:** Check the check box if approval of the workflow step approves plan time.
- **Resources:** If using the Specific Users Approval Type. Enter user names.
- **Plan Field:** If using the Plan Field Approval Type. Select a plan level field.
- **Resource Field:** If using the Resource Field Approval Type. Select a resource level field.
- **Department Field:** If using the Department Manager Approval Type. Select a field.

3. Click **ADD** to create a new workflow step.



You may repeat these steps to add additional workflow steps to continue the approval process per business needs.



Work Plan App

How do I manage Work Types?

This article explains how to add and manage work types. By default, the work types include Tasks, Risks, Issues, Backlogs, Schedules, and Key Decisions. The work types are configurable to align to your business needs. When looking at the Work Plan pages, views are saved for that specific work type. The additional work type items show in Timesheets & My Work.

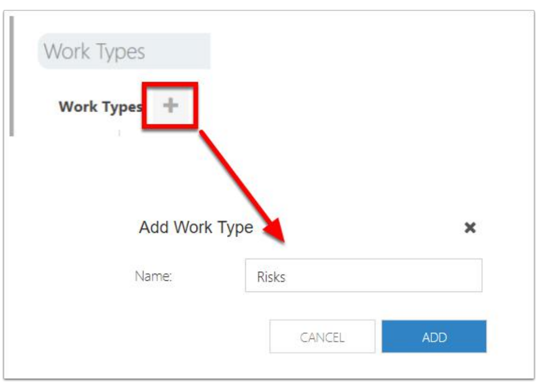
Go to the Admin pages, select **Work Plan** in the navigation.

When the **Backlog List** App is added to your OnePlan group, a new work type called Backlog gets created automatically. The fields and views are also added.

Add Types

Add one or more work types by clicking the **Add** button.

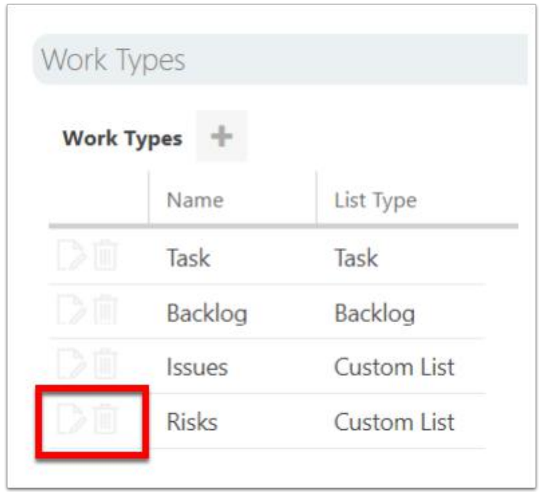
Enter the name of the Work Type. Click the **Add** button.



Work Types Listed

Any Work Types added automatically or manually will show on the page.

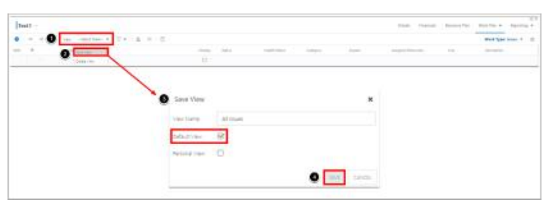
If needed, you may edit or delete a work type by clicking on the icons.



Work Type Views

To create a default work type view:

1. Configure your work type view by adding, removing, and reorganizing columns as desired.
2. In the View menu, select **Save View**. The **Save View** form will open.
3. Complete the **Save View** form.
   - **View Name:** Enter the name of your new view.
   - **Default View:** Check the check box to make the new view the default view for the work type.
   - **Personal View:** Leave the check box unchecked.
4. Click **Save** to save the new view.



To create a personal work type view:

1. Configure your work type view by adding, removing, and reorganizing columns as desired.

2. In the View menu, select **Save View**. The **Save View** form will open.
3. Complete the **Save View** form.
    - **View Name:** Enter the name of your new view.
    - **Default View:** Leave the check box unchecked.
    - **Personal View:** Check the check box to make a new personal work type view.
4. Click **Save** to save the new view.

Configure Work Type Form Layouts

This article explains how to manage the layout of the Plan Details page in OnePlan.

This requires the Work Plan App be installed.

Go to the Admin pages, select **Work Plan** in the navigation. Then expand the **Forms** heading.

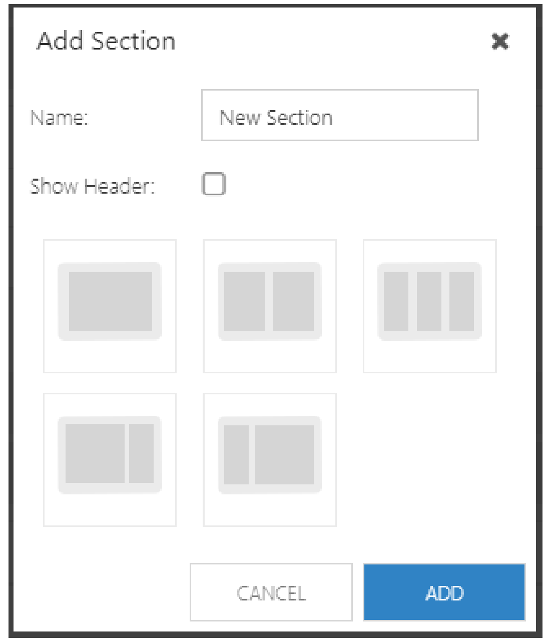
Add, edit, or delete form sections

Sections make up the main layout of the work type form.

To add a new section:

1. Select the **Add Section** icon (+). The **Add Section** form will open.

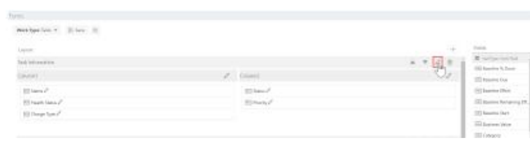
2. Complete the **Add Section** form.
    - **Name**: Enter the name of the new section.
    - **Show Header**: Check the check box to show the section header.
    - **Layout**: Select the section layout.



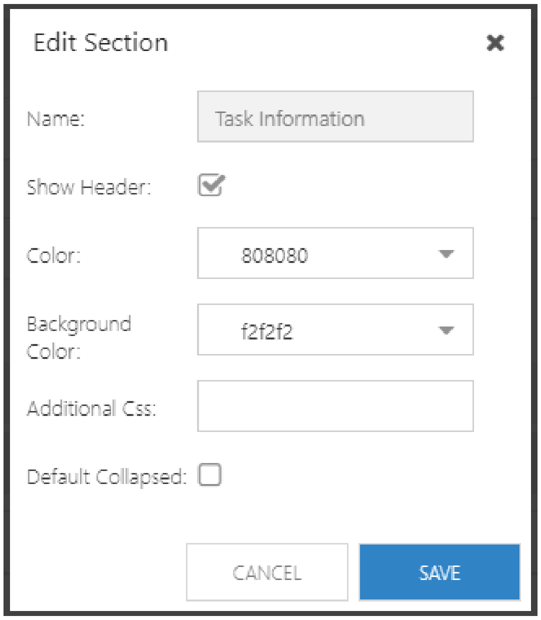
3. Select **Add**.

To edit sections:

1. Click the **Edit** icon next to the desired section header. The **Edit Section** form will open.



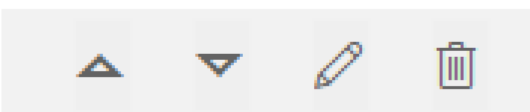
2. Complete the **Edit Section** form.
    - **Name**: Enter the name of the section.
    - **Show Header**: Check the check box to show the section header in the plan details form.
    - **Color**: Use the color picker to select the text color for the column header.
    - **Background Color**: Use the color picker to select the background color for the column header.
    - **Additional CSS**: Enter any additional CSS that you would like to add to the section.
    - **Default Collapsed**: Check the check box if you would like the section content to be collapsed at default.



3. Click **Save**.

To rearrange sections, select the up or down arrows next to the desired section header.

To delete a section, click the **Delete** icon next to the desired section header.



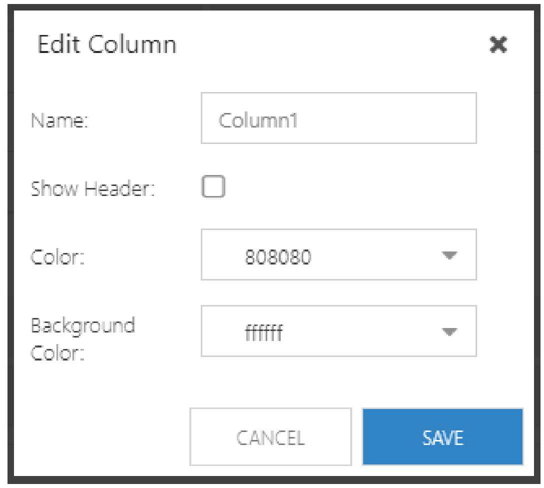
Edit Form Columns

Columns make up the form sections. You selected the column layout when you created the section. See Add, edit, or delete form sections [133].

To edit form columns:

1. Select the **Edit** icon next to the header of the desired column. The **Edit Column** form will open.

2. Complete the **Edit Column** form.
   - **Name**: Enter the name of the column.
   - **Show Header**: Check the check box to show the column header.
   - **Color**: Use the color picker to select the text color for the column header.
   - **Background Color**: Use the color picker to select the background color for the column header.



3. Click **Save**.

Add, Edit, or Remove Form Fields

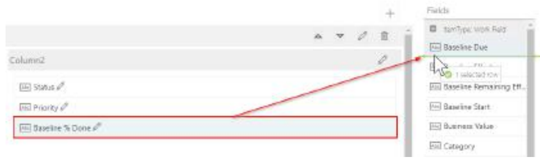
Within the form sections, you can place form fields. These fields pull data from work fields across OnePlan.

To add a new field to a section:

1. Select the desired field from the Fields panel.
2. Drag and drop the field into the desired location within a section.

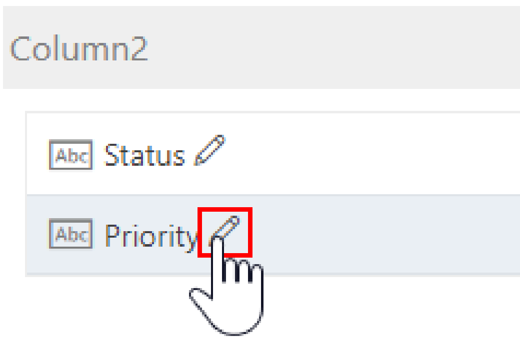
To remove a field:

1. Select the desired field within a section.
2. Drag and drop the field into the Fields panel. Ensure that plan fields are placed with plan fields, and summary fields are placed with summary fields.

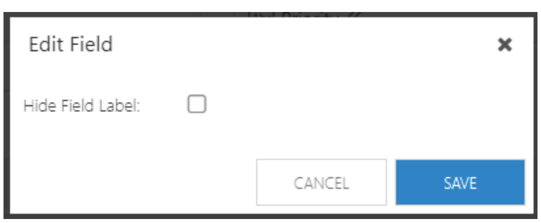


To edit a field:

1. Select the Edit icon next to the desired field. The Edit Field form will open.



2. Complete the Edit Field form.
   - **Hide Field Label**: Check the check box to hide the field label in the Plan Details form.



3. Select **Save**.

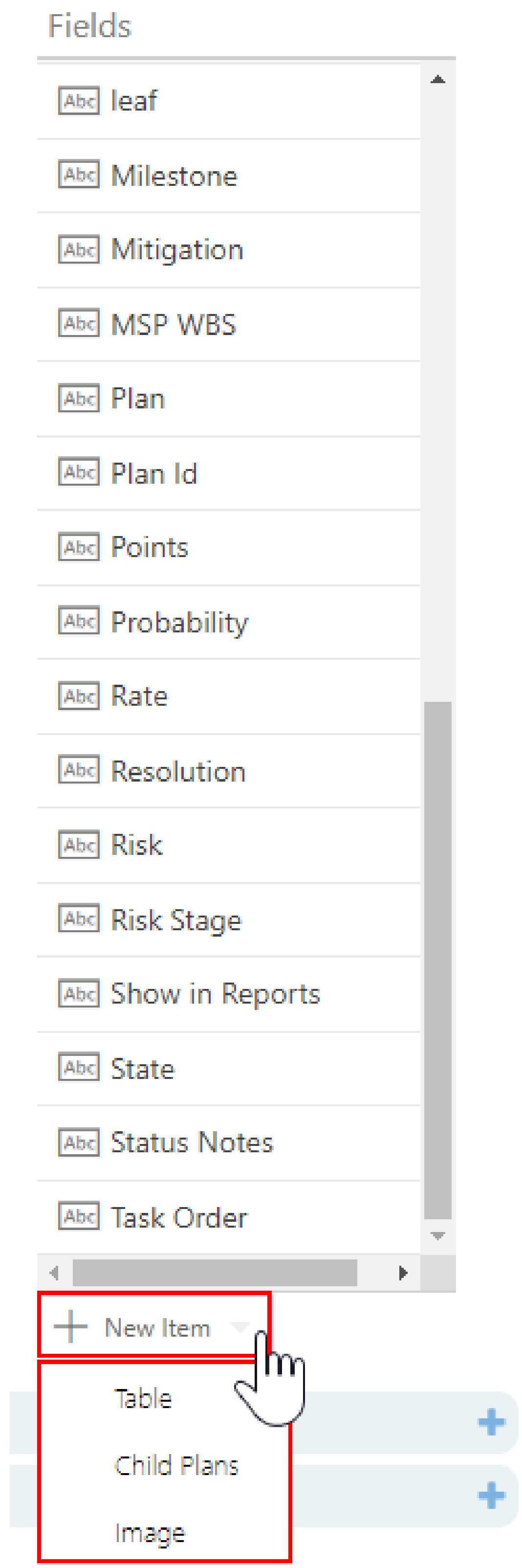
Create, add, edit, or remove field-level items

Items include tables, child plans, and images. These add additional information to your form to improve the user experience.

Items can be added at the field-level of your form. Once items are created, they function like fields.

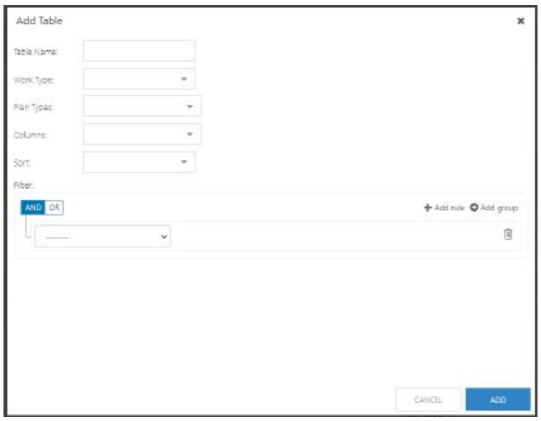
To create a new item:

1. Click **New Item**. Select the item type from the drop down. Options include table, child plans, and image.



2. Complete the **Add [item type]** form. In this example, we have added a table field.

> **NOTE**
> The forms will vary based on the item type chosen.



3. Click **Add**. The new item will appear as an option at the bottom of the Fields menu.

To add, edit, or remove an item in the form, follow the procedures in Add, Edit, or Remove Form Fields [134].

Configure Multiple Baselines

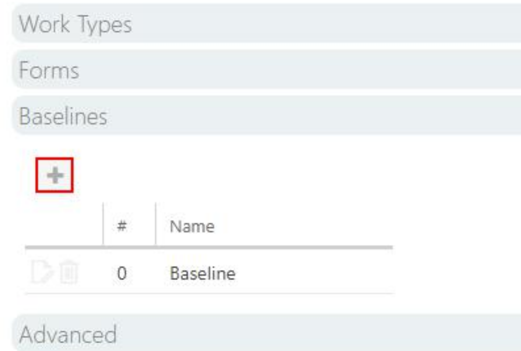
This article explains how to set up multiple baselines for your work planner.

This article requires the Work Plan app to be installed, and advanced settings enabled. Contact your OnePlan representative for assistance.

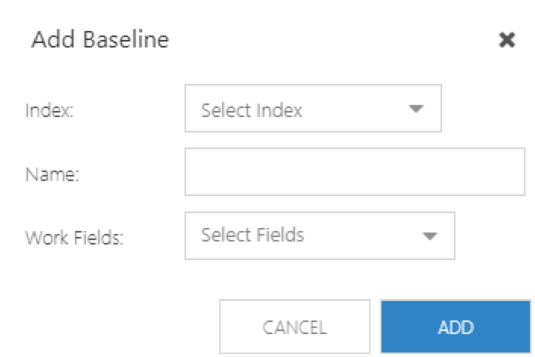
By defauly, OnePlan only has one baseline configured (Baseline 0). You can configure up to 11 baselines total.

To configure a new baseline

1. Go to the Admin pages > **Work Plan** > **Baselines**.



2. Click New Baseline (+). The **Add Baseline** form will open.
3. Complete the **Add Baseline** form.
   - **Index**: Select the index number for the new baseline. The out of the box baseline has an index of 0. So the next logical baseline index is 1, and so on.
   - **Name**: Enter a name for the baseline.
   - **Work Fields**: Select the work fields that will be snapshotted/saved when the user saves a baseline.



4. Click **Add** to create your new baseline.

Enable the Work Plan Save Button

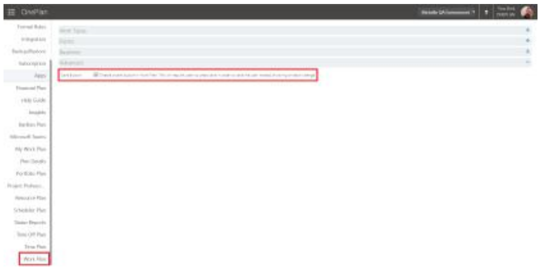
This article explains how to enable the save button in the Work Plan.

See Save Changes in the Work Plan for details on using the save button.

To enable the save button in the Work Planner:

1. Go to the Admin pages.
2. Go to **Work Plan** > **Advanced**.

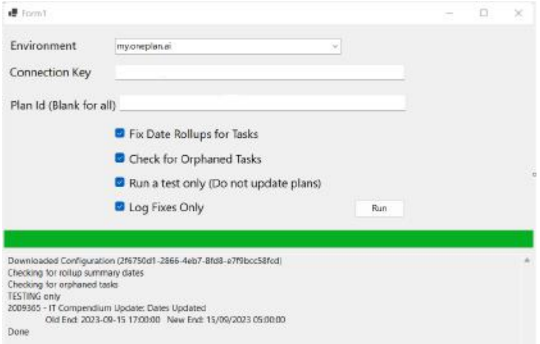
3. Check the check box to enable the save button.



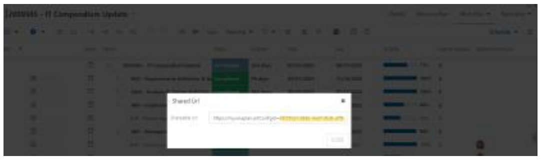
Use the DateFix Utility to Fix Rollup Date Issues in the Work Plan

This article explains how to access and use the DateFix utility to fix the data in database and rollup dates issues in the work planner.

1. Install the OnePlan DateFix Utility.
2. Run the Utility Tool with the below details:



- **Environment:** Select your OnePlan environment.
- **Connection Key:** Enter an authentication key generated from your OnePlan environment.
- **Plan Id:** Enter the Id for the tool to update specific projects or leave it as blank to run for all the projects.



- **Fix Date Rollups for Tasks:** Fixes the rollups for Summary Start and End dates based on the Schedule start and end dates
- **Check for Orphaned Tasks**: Tasks that are in database but are not in the front end
- **Run a Test only (Do not update plans):** It will run a test to show which data will updated but will not actually update the plans.
- **Log Fixes Only:** If it is enabled it will only show the entries that are fixed.

3. Click **Run** to run the utility.

Tenant Migration

How to Migrate OnePlan to a New Tenant

This article explains what you, as a OnePlan admin, need to do to successfully migrate OnePlan to a new tenant.

1. Set up 2 user accounts with owner/admin permissions in the current (old) tenant.
   a. One as a user for the current tenant.
   b. One user will be migrated to the new tenant.

   > **IMPORTANT**
   > We strongly recommend using 2 service accounts for this process.

2. Update user GUIDS and emails if needed, except your admin user for the current tenant (from step 1a above).

   > **NOTE**
   > You can use the Resource API to update the Office365Id and email fields. This method is usually only recommended for large organizations with a lot of users.

3. Migrate your new tenant admin user (from step 1b above) to the new tenant. For the new tenant admin user, swap out the Office365Id to match the new tenant Id. You will now have access to the new tenant once the admin user is migrated.
4. Login to the new tenant and create a test OnePlan site.
5. Contact OnePlan to update the Tenant Id.

> **IMPORTANT**
> Provide the Group Id and New Tenant Id.

Administrator Best Practices

Improve OnePlan Performance as an Administrator

This article details the actions you can take as an administrator to help improve OnePlan performance.

As a OnePlan administrator, you need to understand that almost every setting has a consequence. You must configure your OnePlan environment carefully to ensure that you do not hinder system performance. Following are recommendations from the OnePlan team to help improve and maintain OnePlan performance that you can implement as an administrator.

There are also actions that your end users can take to help OnePlan performance as well. See Improve OnePlan Performance as an End User for more information.

User Settings

- Set up Resource Managers. This will reduce the number of resources loaded into the resource planner for those users with the RM role. This will increase loading speeds for the resource planner.
- Follow the lowest-level permissions model. This means that you should assign your users the lowest permissions possible. Most users should be Team Members and Contributors. This approach cuts down on clutter and risk.

Automations

- Review the schedules and automations that you have configured for your environment. Remove what you do not need.
- Avoid scheduling an automated function to begin at midnight Pacific time. This is a very common time slot for automations to be configured, so there may be some traffic that will slow down performance.

Fields Settings

- Limit the total number of fields you configure in your OnePlan environment. Only configure the fields that you need. Having a lot of fields in your environment can slow down OnePlan performance due to the large amount of data that it needs to load when there are a lot of fields.
- Limit the number of choices you have configured for a given choice field. Having a lot of choices in a choice field can negatively impact OnePlan performance as there is a lot of data that needs to load when interacting with the choice field.
- Limit the number of calculated fields in your environment. Having a lot of calculated fields can slow down OnePlan performance as the system needs to run each calculation configured.
- Review your calculations to ensure they function as intended. Having bad calculations for your calculated fields can negatively impact OnePlan performance as it will run into errors when the system tries to run bad calculations.

Status Report Settings

- Only run status reports as needed, and no more. Review the Schedule settings for your status reports. Running status reports on a less frequent schedule can help improve performance as there is one less automated function that is running in the background.
- Limit the number of snapshot fields in the Snapshot Settings for your status reports. Reducing the number of fields that are snapshotted when a status report is pulled can help improve performance as there is less data being captured.

Resource Plan Settings

- Minimize cost categories and types in the financial planner.
- Limit or do not turn on custom cost categories and detail rows.
- Reduce the number of capacity months for your resource plans. The fewer the better. Limiting the number of capacity months in your resource plans reduces the amount of data in your resource plans and helps speed up performance.
- Negotiations on all types.

Time Plan Settings

- Lock old timesheet periods.

Plan Details Settings

- Keep your plan details forms simple. Limit the number of fields that you have in your plan details forms and refrain from creating complicated plan details forms where possible.

Format Rules Settings

- Limit the number of format rules configured in your environment. Review the pre-configured format rules and remove the ones that you do not need. Having a lot of format rules can negatively impact performance.

OData and Reports

- Use timesheet filters. These are server-side filters in the query to limit the amount of data loading into the report.
- Remove unneeded tables, calculations, and joins.