Project2Planner Admin Guide

Installing and configuring the Microsoft Project add-in in a tenant

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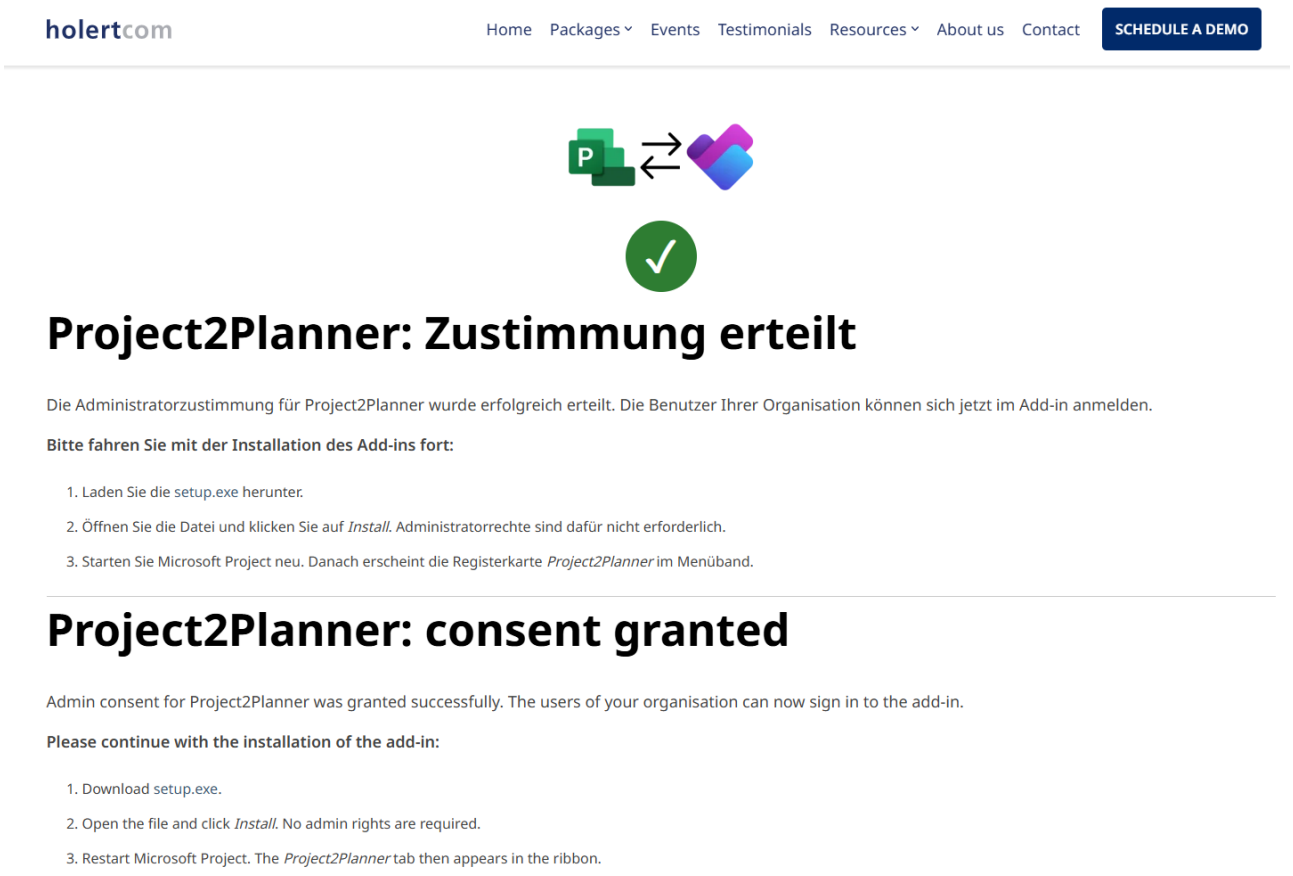
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1. Preparation

This step is only necessary when you block users from giving consent to new applications.

Allow the app in your Microsoft 365 tenant. An Azure administrator does this by opening this link: https://login.microsoftonline.com/common/adminconsent?client_id=bd5bd2b1-2802-4629-b5df-3f03c19bb074&redirect_uri=https%3A%2F%2Fwww.holert.com%2Fen%2Fproject2planner%2Fadmin-consent

If successful, you should be forwarded to this site:



2. Installation

Download the setup.exe file of the Microsoft Project add-in from https://holerthosting.blob.core.windows.net/project2planner/setup.exe.

Open the setup.exe file and click install. No admin rights are required for this installation.

Restart Microsoft Project after the installation. The Project2Planner tab then appears in the ribbon, with the buttons for creating and updating Planner tasks, for updating Project from Planner, and for the settings, the help and the version information.

3. Optionally preconfigure field mappings

By default, every user needs to configure the fields in Project2Planner. Optionally we can copy the configuration to a new installation. This means that we would add something to the code. So, if you want to deploy a default configuration for your users let us know and we can add that to the software.

The configuration file named Project2PlannerConfig.json is stored in the folder %localappdata%\Project2Planner\. It contains the following configuration options.

3.1 Title

The title (task name) of the created Planner task. You can use placeholders that contain field values from Project. The title information in the configuration looks like this:

```
"Title": {
   "Text": "{0} {1}",
   "FieldNames": [
      "Gliederungsnummer",
      "Name"
   ]
}
```

In this example two placeholders {0} and {1} are used. Those contain the values of the Project fields Gliederungsnummer and Name of the selected Project task. Make sure that there are as many placeholders as FieldNames entries.

To stay independent of the language of Microsoft Project, a field can be given as a number from the pjField enumeration: PjField enumeration (Project). "Finish" as text only works for users who have the English version of Microsoft Project, but 188743716, the internal field value for Finish, works whatever language a user runs.

3.2 Description

The description (notes) of the created Planner task. You can add multiple lines here. Each line follows this schema:

```
{
   "Text": "Ende: {0}",
   "FieldNames": [
      "Finish"
   ]
}
```

In the Text value you can enter any text that should be shown in this line of the description. Placeholders work as in the title: {0} is replaced with the value of the first field name, {1} with the second, and so on. Make sure that there are as many placeholders as FieldNames entries.

To stay independent of the language of Microsoft Project, a field can be given as a number from the pjField enumeration: PjField enumeration (Project).

3.3 SubTaskList

This element contains all the subtasks or checklist items that should be created in each of the Planner tasks.

3.4 Attachments

The attachments element contains all the attachments that should be added to the created Planner tasks by default. An attachment in Planner is always a hyperlink. You can set an alias for each attachment, which appears as the attachment name in the Planner task.

The Url element contains the url that should be added. Placeholders work there as well. In the following example the whole url comes from a field of Microsoft Project.

```
"Attachments": [
  {
    "Alias": "Hyperlink",
    "Url": "{0}",
    "UrlFieldNames": [
      "HyperLinkAddress"
    ]
  }
]
```

3.5 AssignedToFieldName

Sets the field out of which the assigned user of the created Planner task is read.

3.6 PlannerBucketFieldName

Sets the field that holds the name of the Planner bucket the tasks are created in. The add-in reads it per task and falls back to the value on the project summary task, so the bucket can be set once for the whole project or individually per task.

3.7 PlannerUrlFieldName

Sets the field that holds the link to the Planner plan. The add-in always reads it from the project summary task, so the value applies to the whole project.

With Microsoft Project on its own, both are local task text fields of the project file. Users can create them, together with the field of PlannerTaskLinkWriteBackFieldName, with Set up fields in this project on the Sync Settings tab of the settings; the add-in also offers this before Create/Update when the fields are missing. Where the projects are published to a Project Server, they are usually enterprise custom fields, so that every project has them.

3.8 PlannerInfoFieldName

Only used in sync mode MultiplePlannerPlansByHierarchy, where it replaces PlannerUrlFieldName, PlannerBucketFieldName and PlannerTaskLinkWriteBackFieldName. This is a task-level field, and what it holds depends on the level of the task: the link to the Planner plan, which the user enters, then the id of the Planner bucket and the link to the Planner task, both of which the add-in writes itself.

3.9 PlannerTaskLinkWriteBackFieldName

Sets the field the link to the created Planner task is written into. Make sure that this is a valid field name that exists in Microsoft Project; if it is not, the add-in skips the write-back.

3.10 ShowSuccessMessage

Can be true or false. Determines whether the success message is shown after creating tasks in Planner or after applying the updates to the project.

3.11 ShowSyncReport

Can be true or false, and is true by default. Determines whether the report is shown after a synchronisation that could not do everything, listing the tasks that were skipped or failed and the reason for each. Users can also switch it off in the report itself or on the user interface tab of the settings. The report is written to the log file in either case.

3.12 ShowPendingUpdatesWarning

Can be true or false, and is true by default. Create/Update writes the progress from Project to Planner. When Planner reports a different progress for one of the selected tasks, the add-in warns before it writes and offers to open the update dialog first, so that progress entered in Planner is not overwritten unnoticed. Users can switch the warning off on the user interface tab of the settings.

3.13 HelpUrl

Sets the link that opens when a user clicks the help button in the ribbon. By default this is the Holert support portal.

3.14 UseProxy

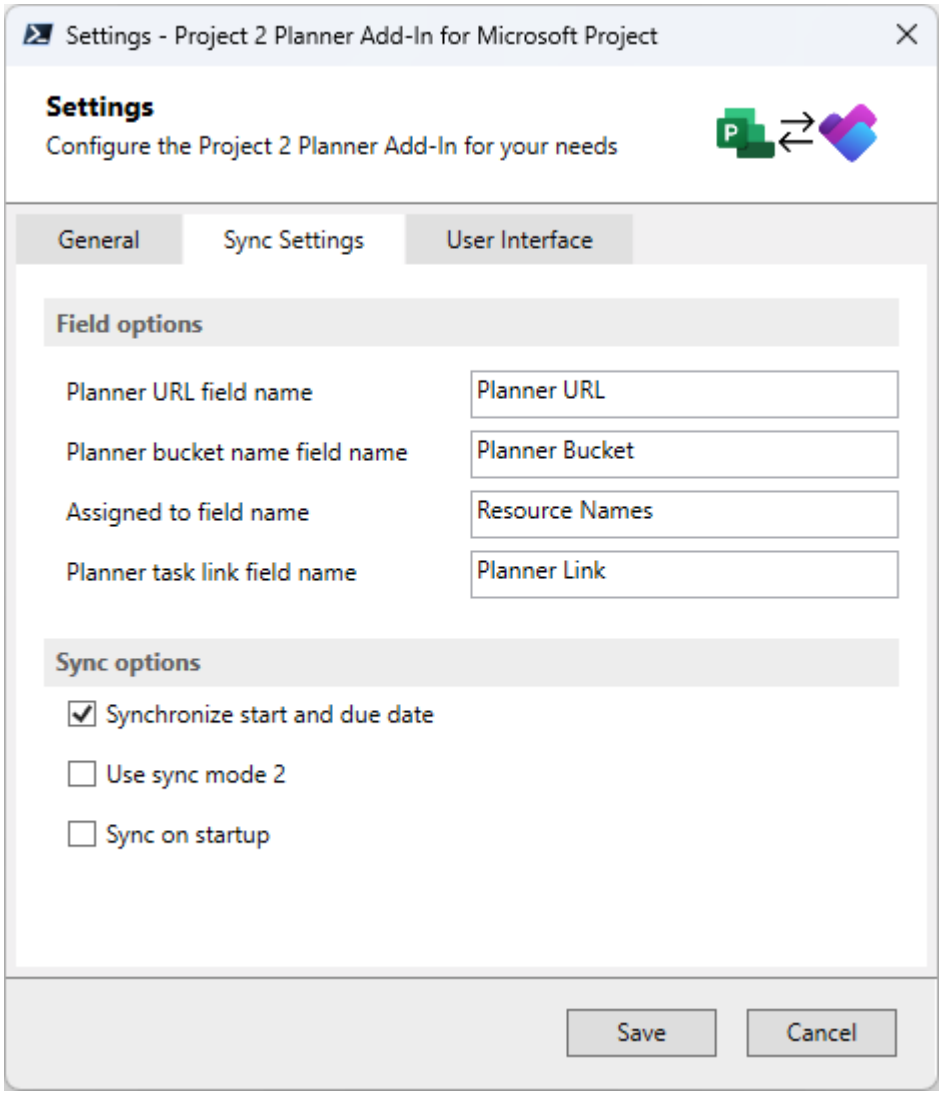
Enables the use of a proxy.

3.15 ProxyUrl

The proxy url to be used.

3.16 SyncDate

If true, the start and finish date of the project task are synchronised into the start and due date of the Planner task. Users can change this setting themselves on the sync settings tab.



3.17 SyncMode

Possible values 1 or 2. Can only be set in the configuration file, and changes the logic of the synchronisation.

- 1: SinglePlannerPlan — one Planner plan per project.
- 2: MultiplePlannerPlansByHierarchy — plans, buckets and tasks follow the task hierarchy of the project.

3.18 PlannerChecklistBackupFieldName

The name of the field used to store the checklist backup, only for sync mode MultiplePlannerPlansByHierarchy.

4. Licensing

Project2Planner is licensed per named user for the period agreed in the contract. The licensed users are maintained by Holert. Nothing has to be configured in the tenant of the customer, and no consent by an administrator is required.

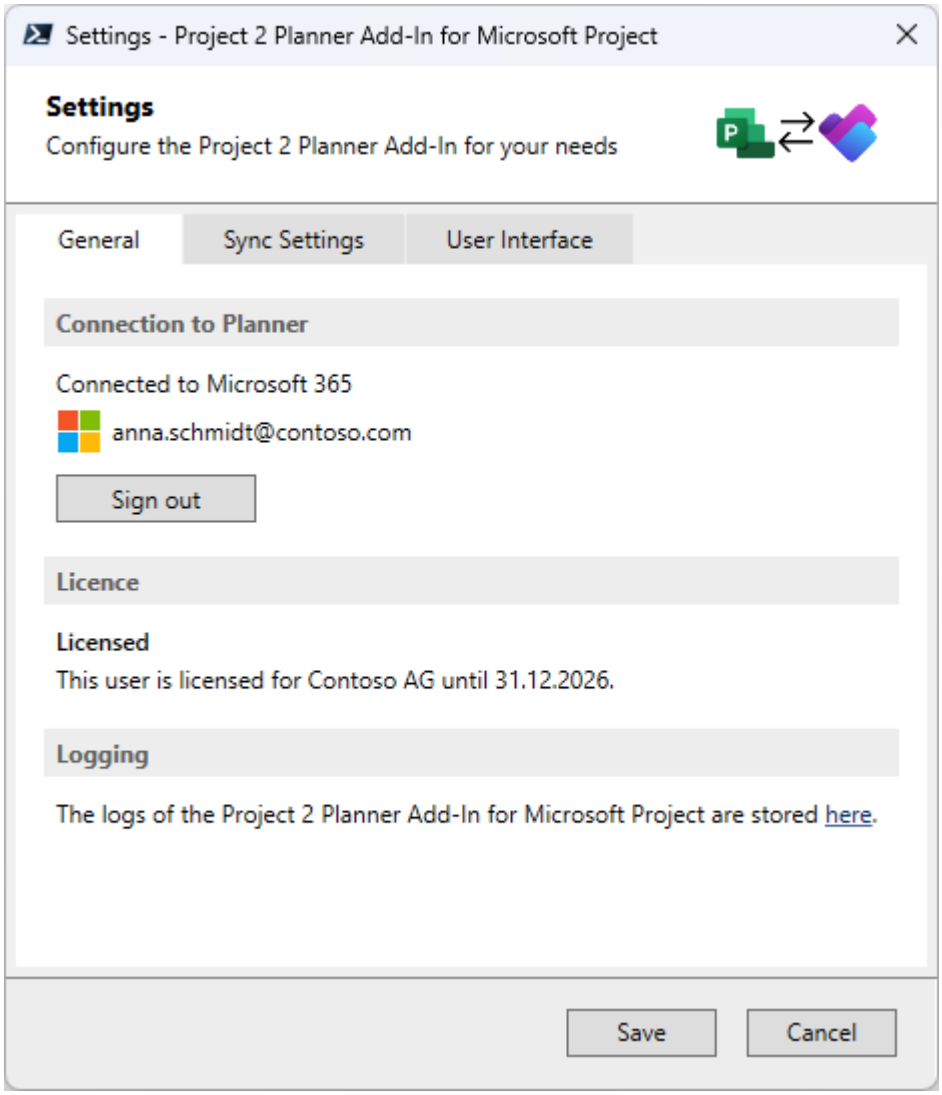
4.1 Network access

The add-in retrieves its licence over HTTPS from https://holerthosting.blob.core.windows.net/project2planner/Licenses/. This address has to be reachable from the client. Where a proxy is in use, the add-in uses the proxy configured through UseProxy and ProxyUrl.

If the address is temporarily unreachable, the last retrieved result stays valid for 14 days, so a short outage does not stop anybody from working.

4.2 What the user sees

A licensed user notices nothing. The current licence status is shown on the General tab of the settings dialog, under Licence: whether the user is licensed, until when, or how many days of the evaluation period are left.



A user who is not licensed can work for an evaluation period of 30 days and sees a note with the remaining days, at most once per day.

After the evaluation period, or once the licence of the organisation has expired, synchronisation is refused and a dialog names the reason. Working with the project itself is not affected.

To license a further user, send the user principal name to sales@holert.com. The change takes effect the next time Microsoft Project is started; no update of the add-in is needed.

5. Troubleshooting

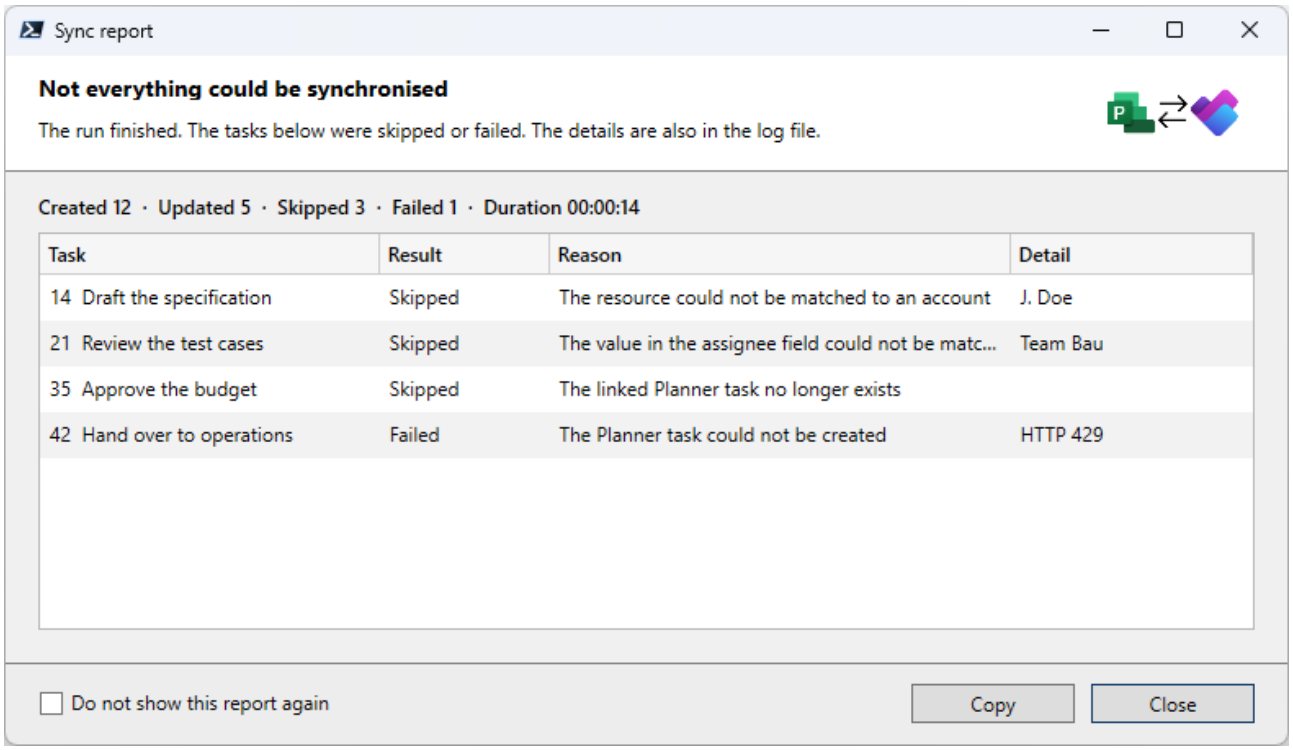
5.1 Check the logs

The log files are stored in the folder %localappdata%\Project2Planner\Logs, with a Log_yyyyMMdd_hhmmss filename. A log holds the steps the add-in took, together with its warnings and error messages.

The log files are deleted automatically after 90 days. They stay on the computer of the user; nothing is sent to Holert.

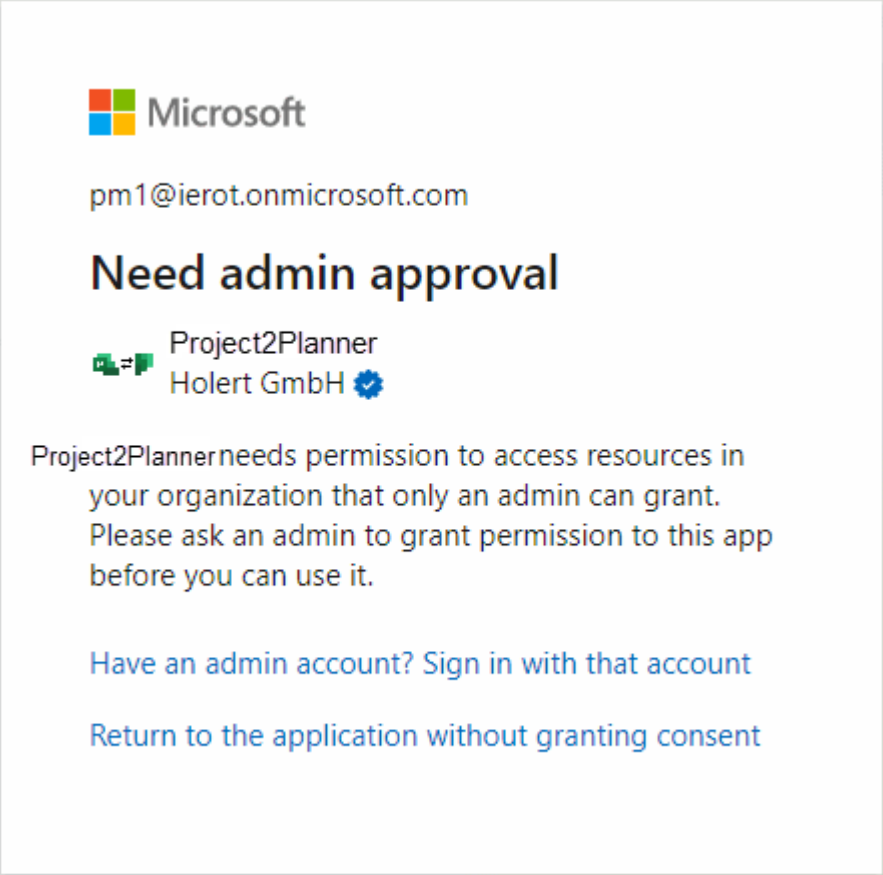
5.2 Tasks were skipped or failed

When a run cannot do everything, the add-in shows a report after the run. It lists every task it skipped or could not write, with the reason and, where one helps, a detail such as the resource it could not match. The same lines go into the log file, so the report can be reconstructed afterwards even when the user closed it. ShowSyncReport switches the dialog off; the log entry stays either way.



5.3 Sign in problems: allow the app

Depending on the tenant configuration it is necessary to give admin consent for this application. If the app registration is not allowed in your Microsoft 365 tenant, the user sees a screen saying that admin approval is needed.



An admin with one of the roles Application Administrator, Cloud Application Administrator, Global Administrator or Privileged Role Administrator can allow the app in the tenant with this link: https://login.microsoftonline.com/common/adminconsent?client_id=bd5bd2b1-2802-4629-b5df-3f03c19bb074&redirect_uri=https%3A%2F%2Fwww.holert.com%2Fen%2Fproject2planner%2Fadmin-consent

The app asks for the following permissions:

- User.Read
- User.ReadBasic.All
- Tasks.ReadWrite

What the add-in does with them is described in the Security and Trust document.

5.4 Sign in problems: delete the token cache

For other sign in problems, go to the folder %localappdata%\Project2Planner\ and delete the file .msalcache.bin3. The add-in then asks for the sign in again the next time it is used.

Related documents

- **User Guide —** Project2Planner User Guide
- **Dev Guide —** Project2Planner Dev Guide
- **Security and Trust —** Project2PlannerSync Security and Trust
- **PjField enumeration —** Microsoft Learn, field numbers for a language independent configuration

Contacts

- **Support —** Holert service desk, support@holert.com
- **Licensing —** sales@holert.com
- **Product owner —** Maximilian Münst, Holert GmbH