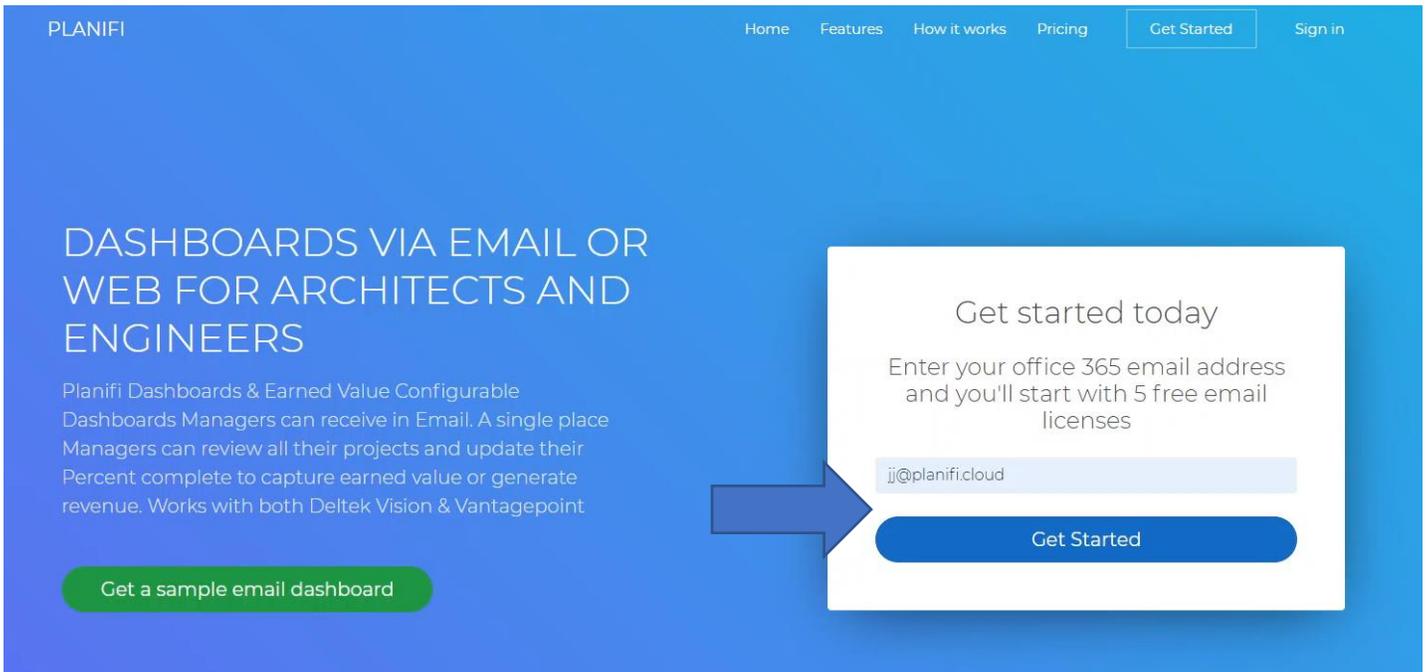
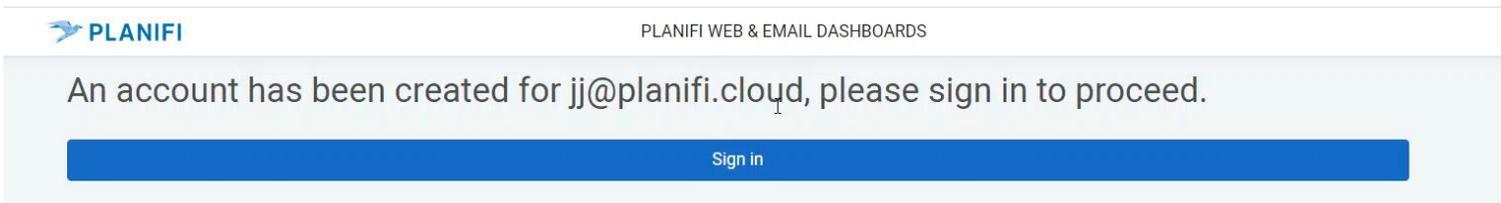


Configuring PLANIFI EMAIL & WEB Dashboard

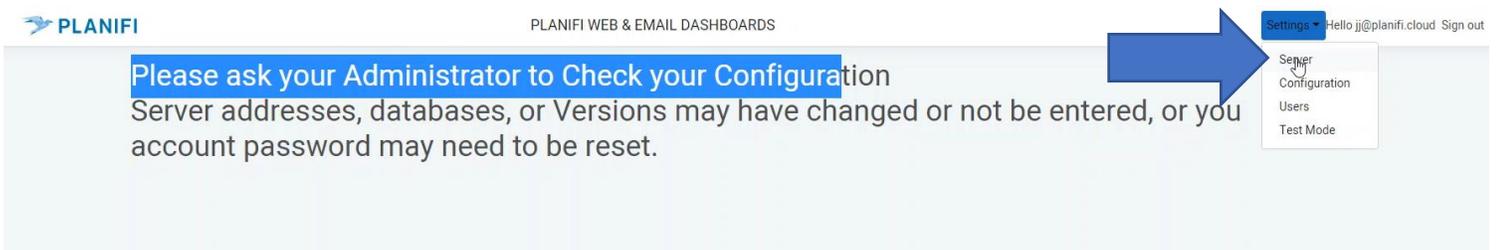
1. Enter your Office 365 or Azure email address and press Get Started.



2. Click Sign In next



3. Click Settings and then Click on the Server



4. Choose your Server Type (Vision, VantagePoint 2.0, Vantage Point 3.0). Then your server address in the form of <https://Yourserver/Vision> for Vision Users.
<https://Yourserver/Vantagepoint> for Vantagepoint 3.0 Users
<https://YourFirm.deltekfirst.com/YourFirm> for Cloud Hosted Deltek users
Note the server does needs accessible over the internet.
If you're having issues you can validate that this address is accessible over the internet if you're Vision user.
<https://Yourserver/Vision/visionws.asmx>

Server Address

Settings

Server Type ()

Server Address

Examples:

- http://testing.planifi.net/vision/
- http://testing.planifi.net/vision
- http://testing.planifi.net/Vision

Notes:

this page: <https://Yourserver/Vision/visionws.aspx>

Next

5. Now choose your database you'll be using and enter a user account and password. This account will need the **Allow Access to SOAP API** access if that option exists. If you're using Vantagepoint use the Integrations Setup forms in Utilities, then choose API Authorization to get a Client ID and Secret. Click save and the account will be verified.
6. Download the stored procedures by clicking the Download button. These need to be added to your sql database if you're running on premise, by simply executing the script on your Deltek Database. If you're on the Deltek Cloud they will need to be submitted to Deltek in Support as a Database modification ticket.

Settings

Server Type (Vision)

Server Address

Saved Database Name (case sensitive)

SHW7 (localhost)

Database List

User Name (case sensitive)

Password (case sensitive)

Windows Integrated Account

Client ID (Vantagepoint Only)

Client Secret (Vantagepoint Only)

Save

Messages:

Login Valid

Download Stored Procedures

Download

The stored procedures need to be added to your sql database or submitted to Deltek as a Database modification if you're hosted by Deltek.

- Now Click Settings and Configuration. Here you can choose what Charts and Metrics you'd like to show on your Dashboard. Note, you can also change labels here. At the bottom you'll choose the Hour to send the email for example 5 would 5am, or 17 would be 5pm. Times are currently in Central only, time zones will be added in the future.. Next is how frequently you'd like to send the email, 1 for every week, 2 for every other, or 4 would be every 4th week. Next choose the day of the week to send the email. And finally you can adjust the size of the email images at the bottom, which you may need to adjust based on the number of charts and metrics you choose to show.

- Under Settings Test Mode you can enable Testing so that the email address entered will receive all the dashboard emails while enabled, so the numbers can be validated and settings adjusted.

- Finally, in the Users area you can choose who will receive dashboard emails, if you purchase the Earned Value option you can choose who can update % complete and you can enable additional administrators.

Enable Email (5)	Enable Earned Value(0)	Email Address	Name	Admin
<input checked="" type="checkbox"/>	<input type="checkbox"/>	BWhitaker@company.com	Ben Whitaker	<input checked="" type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	MSolomon@company.com	Marian Solomon	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	JSykes@company.com	Jose Sykes	<input type="checkbox"/>
<input checked="" type="checkbox"/>	<input type="checkbox"/>	FBaker@company.com	Frederick Baker	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	MGross@company.com	Marshall Gross	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	GHolmes@company.com	Gretchen Holmes	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	BJames@company.com	Brandon James	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	TStone@company.com	Tamara Stone	<input type="checkbox"/>
<input type="checkbox"/>	<input type="checkbox"/>	PHodge@company.com	Patricia Hodge	<input type="checkbox"/>