



PlanningPME
Schedule easily



TARGET SKILLS

Dimensions





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Introduction

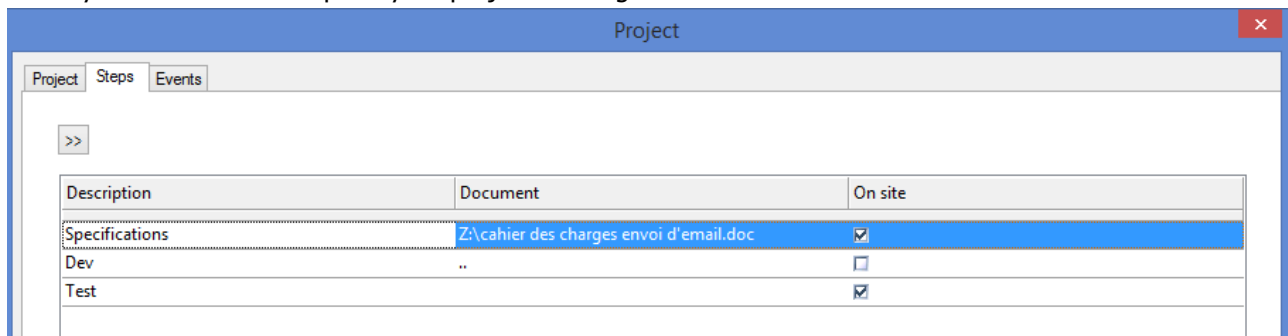
Together we can go beyond the limits of the planning with our **new version** of **PlanningPME integrating all your data**:

- Ask for an audit of your requirements and we'll configure together your planning
- Benefit from our experience with more than 3500 customers

You will find below some examples putting into practice of the new functionalities: dimensions

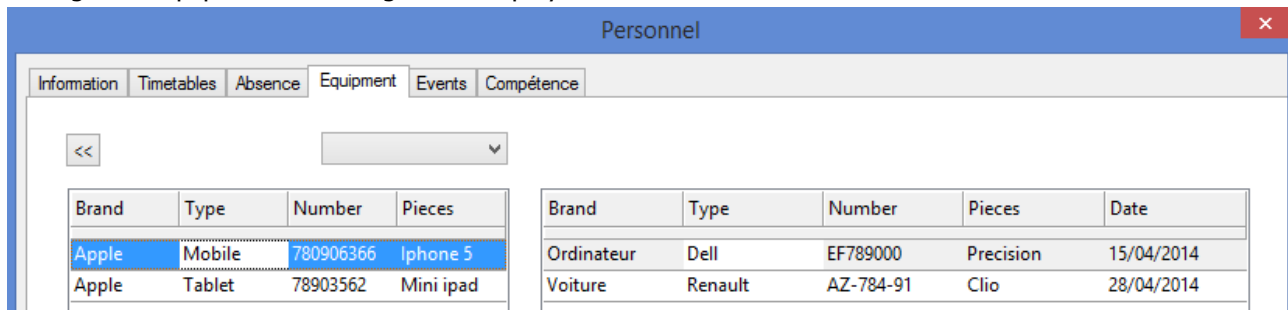
1) Managing **project steps**

Directly insert the main steps of your projects through attached files.



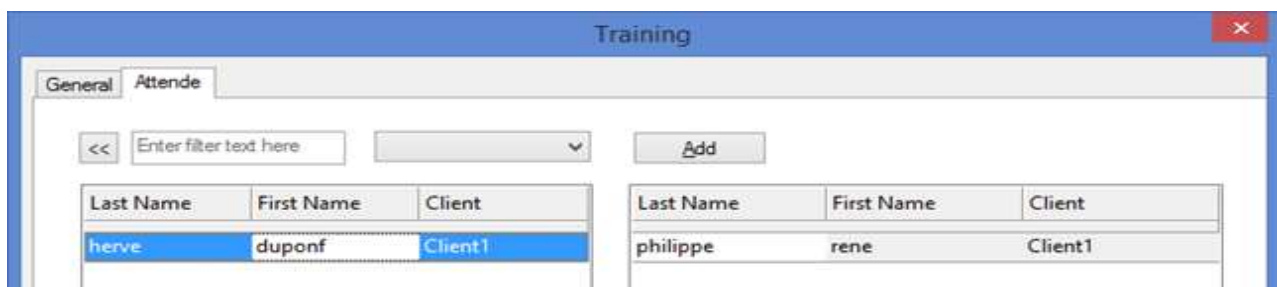
2) Managing **equipment**

Manage the equipment and assign it to employees



3) Managing training attendees

Input attendees to your training without considering them as resources.





Practical case: project steps

Would you like to plan main steps for your projects by adding attached files?

PlanningPME not only allows you to manage projects but also to create a PROJECTSTEP dimension in which you can input your projects steps.

Go to the Data-Menu > New Dimension and add a new PROJECTSTEP dimension stating the **project as a parent**. PlanningPME will create this new table in the database as well as the associated fields.

Dimension

Name : ETAPEPROJET

Label : Steps

Parent : Project

OK Cancel

You can now add fields to the PROJECTSTEP dimension:

Dimensions

Dimensions

ETAPEPROJET

Fields

Name	Type
Document	Link to file
Label	Text
Externalise	Yes/No



You can also input steps for your projects:

Steps (4)

Filter

Drag a column header here to group by that column.

Document	Label	Externalise	Project
Z:\cahier des charges env...	Specifications	<input type="checkbox"/>	Project 001
..	Development	<input type="checkbox"/>	Project 001
	Test	<input checked="" type="checkbox"/>	Project 001
..	Delivery	<input type="checkbox"/>	Project 001

Steps

Project

Document

Label

Externalise



Practical case: assigning equipment to resources

Each firm own equipment like computers, mobiles, pads, cars... These are aimed to employees but don't need to be visible in the planning.

PlanningPME allows you to create an EQUIPMENT dimension in which you can input the equipment list.

Go to the Data-Menu > New Dimensions and add a new EQUIPMENT dimension stating **no parent**. PlanningPME will create this new table in the database as well as the associated fields.

The screenshot shows a 'Dimension' dialog box with the following fields:

- Nom :** A text box containing the value 'MATERIEL'.
- Libellé :** A text box containing the value 'Equipment', with a large empty text area below it for additional input.
- Parent :** A dropdown menu.

At the bottom of the dialog are two buttons: 'OK' and 'Annuler'.

You can now add fields to the EQUIPMENT dimension:



Dimensions

Dimensions

MATERIEL

Fields

Name	Type
Brand	Text
Type	Choice
Number	Text
Pieces	Text



You can also input equipment in the Data-Menu > Dimensions > Equipment:

Equipment (4)
✕

Filter

Drag a column header here to group by that column.

Type	Brand	Number	Pieces
Computer	Dell	EF789000	Precision
Mobile	Apple	780906366	Iphone 5
Car	Renault	AZ-784-91	Clio
Tablet	Apple	78903562	Mini ipad

Equipment
✕

Brand

Type

Number

Pieces



Now that you have input the equipment, you need to allocate equipment to your resources specifying an assignment date; you have to specify that the **EQUIPMENT dimension is linked to resources**. To do so, go to the Data-Menu > New Dimensions, right-click on EQUIPMENT and select Relation to choose connection.

You should add a DATE field and activate filter to ease your selection. Activate the **Check the unicity** check box so that PlanningPME can only allocate equipment to one and only one resource.

Relation

Personnel

Activate the fast search

Activate the filter

Display the button 'add'

Check the unicity

Fields

Label	Type
Date	Date

OK Cancel



You can now allocate equipment in the resource window:

Personnel

Information Timetables Absence **Equipment** Events Compétence

<< [dropdown]

Brand	Type	Number	Pieces
Apple	Mobile	780906366	Iphone 5
Apple	Tablet	78903562	Mini ipad

Brand	Type	Number	Pieces	Date
Ordinateur	Dell	EF789000	Precision	15/04/2014
Voiture	Renault	AZ-784-91	Clio	28/04/2014

History...

OK Annuler



Practical case: training management

Would you like to plan trainings for your customers and integrate attendees?

PlanningPME not only allows you to import or input customers but also to create a new ATTENDEE dimension allowing you to input the name of attendees to a training for each customer you may have.

To do so, go to the Data-Menu > New Dimension and add a new ATTENDEE dimension stating the **customer / client as a parent**. PlanningPME will create this new table in the database as well as the associated fields.

Dimension

Name : PARTICIPANT

Label : Attende

Parent : Client

OK Cancel

You can now add first name and name to the **ATTENDEE** dimension.

Dimensions

Dimensions

PARTICIPANT

Fields

Name	Type
Last Name	Text
First Name	Text



Field
✕

Definition

Name :

Type :

Length : Information

Label : Tooltip

Default:

Mandatory To type

Visible on the mobile version

Values :

You can also input attendees for each customer in Data-Menu > Dimensions > Attendee.

Attende (2)
✕

Filter:

Drag a column header here to group by that column.

Last Name	First Name	Client
herve	duponf	Client1
philippe	rene	Client1



Attende
×

Client Client1

Last Name herve

First Name dupnj

Save
Cancel

You can also find the attendees in the customer window.

Client
×

Informations Attende Events

Filter Enter filter text here Add

Drag a column header here to group by that column.

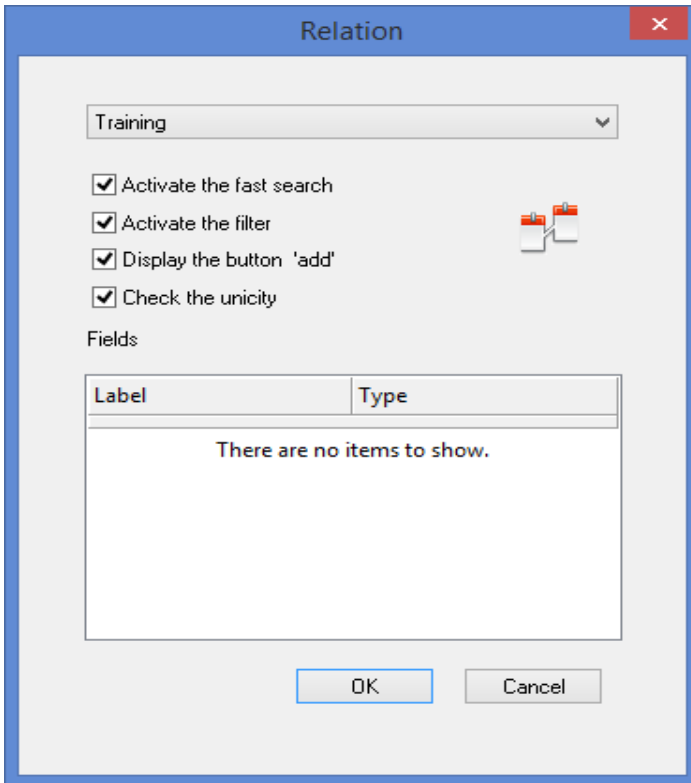
Last Name	First Name	Client
herve	duponf	Client1
philippe	rene	Client1

History...

OK
Annuler



Now that you have entered the attendees, you would like to plan a training with a series of attendees: you need to specify that the **ATTENDEE dimension is linked to the task** (your training). For this, go to the Data-Menu > New Dimensions and right-click on the Attendee dimension. Select Relation to choose the sub-connections and options you'd like to have.



You can now organize a training and select attendees to this training.

