



Tutorial PlanningPME Orion

User Guide

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Since 2002, Target Skills developed scheduling and planning tools that are used worldwide by more than 4500 clients, including building companies, administrations, industries, IT.

Track time and tasks assigned to your employees but also manage rooms, facilities, projects, appointments, meetings easily.

Networkable, highly adaptable, our planning solutions provide an accurate global view of your human and material resources and improve productivity and efficiency.

This manual describes all features within the software PlanningPME.

Set the data of your planning

Vocabulary used in the software

What is a human resource?

A human resource is a physical person: an employee, a technician, a manager, ...

What is a material resource?

A material resource can be several things: a room, a car, a computer, or any material you need to manage.

What is an event?

An event is a mission, a work to do by a human or material resource.

A task is represented by a colored rectangle on the schedule.

A task can be: an appointment, room booking, training, or anything specific to your activity.

What is an unavailability?

An unavailability is a day off, a period when the resource is not available.

An unavailability can be: holidays, days off, illness, ...

What is a resource "to plan"?

The resource "To plan" is a post-it. Each event assigned to a resource "To plan" will appear on the schedule whatever the visualization mode (daily, weekly...) and the date.

What is a department?

A department is a group of human and/or material resources

A department can be a technical, sales service in a company.

Then, you will filter the schedule by department in order to display the resources of a department on your screen.

Resources

You have the possibility to add as many human and material resources as needed. The different types of resources:

Human resources (employees name, employee function, teachers...)

Material resources (cars, rooms, equipments...)

Resources "To plan" (For events not assigned to resources yet)

Then, we are going to explain how to:

Group those resources by department

Group those resources by team

Enter hours and job contract for each employee

Create resources

From PlanningPME, go to the menu "Data" -> "Resource"

The list of all your resources appears.

To create a new resource, press "Add".

To modify it, select the resource and then "Modify" or double click on the resource name.

To delete a resource, select the resource and then "Delete".


Resource (13)

| DEPARTMENT | LABEL | TYPE | NAME | FIRST NAME | TIMETABLES | HIDE |
|-----------------------|---------------|----------|------|------------|-------------------|------|
| | | To plan | | | Profil par défaut | Yes |
| Administration | Adam | Human | | | Profil par défaut | No |
| Commercial, Region A | Alicia | Human | | | Profil par défaut | No |
| IT | Christian | Human | | | Profil par défaut | No |
| IT | Hugh | Human | | | Profil par défaut | No |
| Administration | John | Human | | | Profil par défaut | No |
| Administration | Julia | Human | | | Profil par défaut | No |
| Commercial, Region A | Mel | Human | | | Profil par défaut | No |
| Commercial, Region B | Tim | Human | | | Profil par défaut | No |
| Administration, Co... | To Plan | To plan | | | Profil par défaut | Yes |
| Vehicles | Truck A | Material | | | Profil par défaut | No |
| Vehicles | Truck B | Material | | | Profil par défaut | No |
| Vehicles | Vehicle Alpha | Material | | | Profil par défaut | No |

From the resource Window, you can add all those information:

Resource : Alicia X

Information | Timetables | Skill | Unavailability | Shared calendar | Events

Label : 

Type : ☒ Human ☐ Material ☐ To plan ☐ External

Colors : Background : Text :

Department :

Manager : ☐ Hide this resource

Cost €/H :

ID number :

Name :

First name :

Address :

Zip code : City :

Country : State :

Phone : Mobile :

E-Mail :

Time zone :

History... OK Cancel

Label

This label will appear on the planning board.

Resource type

Choose if this resource is human, material or "To plan".



Human resource



Material resource



"To plan" resource

Hide this resource

Note that you have the possibility to hide a resource when your resource is not part of the company anymore ticking on this option in order to keep track of the history.

Other information

Choose a color for your resource.

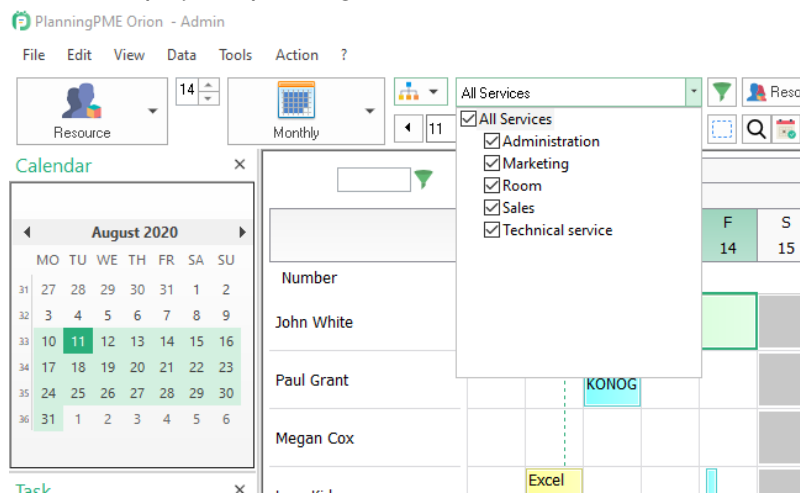
Assign the resource to a department.

Etc...

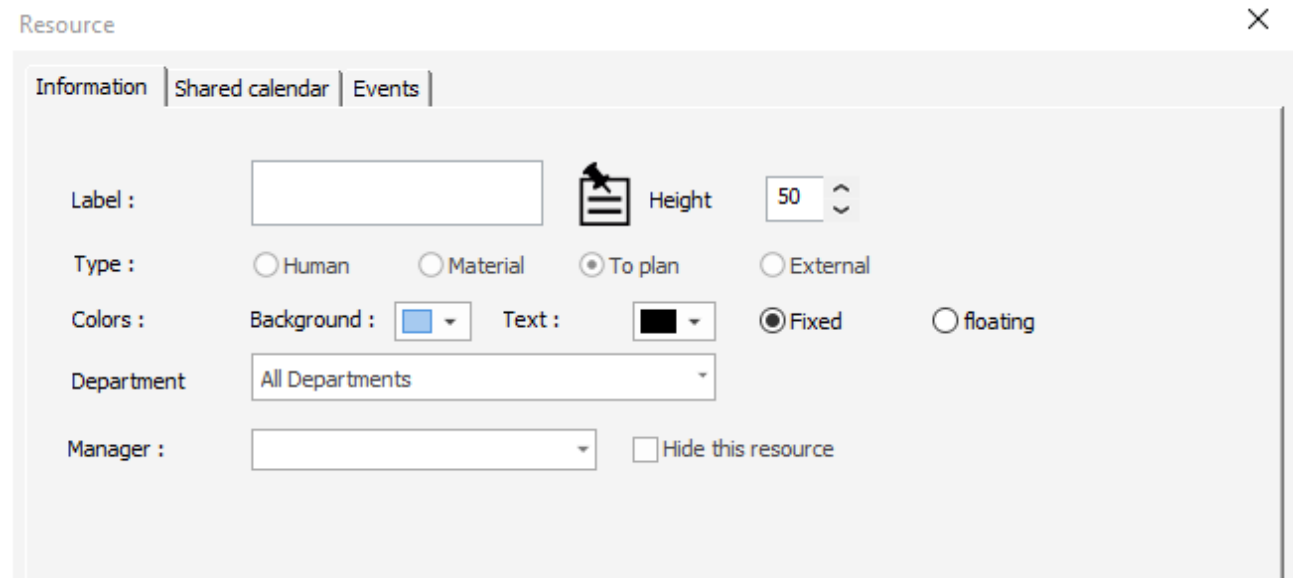
So, you can create as many human and material resources as you want in a very simple way.

Display one or more resources on the screen

You can display the planning of one or more resources from here:



Zoom on resources of the type “To plan”



What is it used for?

The resource “To plan” is like a reminder and shows all events waiting to be allocated.

You can have as many events as you want on resources of the type « To Plan ».



Floating

Each event assigned to a resource "To plan" will appear on the schedule whatever the visualization mode (daily, weekly...) and the date. When you know who is going to complete the job, you will be able to move it via a "Drag and Drop".

Fixed


The events on the planning appear only on the planed dates and you can have several events at the same time:

Height

For a better visualization of your events to be planned, you can change the height of "To plan type resource from the card or directly from the screen shifting the bottom line.

Display a panel: have your events listed

You can have the list of all your events to be planned on a panel as shown below:



| BEGINNING DATE | ENDING DATE | BEGINNING HOUR | ENDING HOUR | DURATION (H) | LABEL | RESOURCE | CLIENT |
|----------------|-------------|----------------|-------------|--------------|--------------|----------|---------------|
| 02/09/2020 | 02/09/2020 | | | 7:00 | Installation | To Plan | Dengel |
| 26/10/2020 | 26/10/2020 | | | 7:00 | Repair | To plan | PPMECA |
| 28/10/2020 | 30/10/2020 | | | 21:00 | Installation | To plan | PPMECH |
| 02/11/2020 | 03/11/2020 | | | 14:00 | Appointment | To plan | Target Skills |

Order your events via the different fields shown and then assign them to your resources via a drag and drop directly.

Departments

Group resources by department

You have the possibility to create departments, as an example: Sales department, Account department, Technical team...

From your entire schedule, you can extract the schedule of one department for a better visibility.

Create departments

From PlanningPME, go to the menu "Data" -> "Department"

Department

Define the structure of your business with your departments and resources

Filter

My company (14)

- Administration (4)
- Commercial (4)
 - Region A (3)
 - Region B (2)
- IT (3)
- Vehicles (4)

Drag a column header here to group by that column.

| DEPARTMENT | LABEL | TYPE | NAME | FIRST NAME | TIMETABLES | HIDE |
|-------------------|---------------|----------|------|------------|-------------------|------|
| Administration | Adam | Human | | | Profil par défaut | No |
| Administration | John | Human | | | Profil par défaut | No |
| Administration | Julia | Human | | | Profil par défaut | No |
| Administration... | To Plan | To plan | | | Profil par défaut | Yes |
| Commercial, R... | Alicia | Human | | | Profil par défaut | No |
| Commercial, R... | Mel | Human | | | Profil par défaut | No |
| Commercial, R... | Tim | Human | | | Profil par défaut | No |
| IT | Christian | Human | | | Profil par défaut | No |
| IT | Hugh | Human | | | Profil par défaut | No |
| Vehicles | Truck A | Material | | | Profil par défaut | No |
| Vehicles | Truck B | Material | | | Profil par défaut | No |
| Vehicles | Vehicle Alpha | Material | | | Profil par défaut | No |

Click on “Add” and give a label to your department. Then select the resources for this department and save.

Department

Label

Parent

Filter

Selected resources

| Department | Label |
|-------------------|-------------------|
| Sales | Megan Cox |
| Sales | Daniel Pitt |
| Sales | Jackie Washington |
| Marketing | Jocelyne Durand |
| Technical service | Marleen Perry |
| Marketing | Christian Damon |
| Marketing | Ben Craig |
| Technical service | François Biting |
| Technical service | Kevin Hanks |
| Room | Room1 |
| Room | Room2 |
| Room | Room3 |
| | To plan |

OK Cancel

You can add as many departments as you want following the same procedure.

Moreover, to save time, with a right click, you can select or unselect all resources selecting the double arrow. Then, close this window and go back to the screen display.

You can add a resource to a department directly from the “Resource” window.

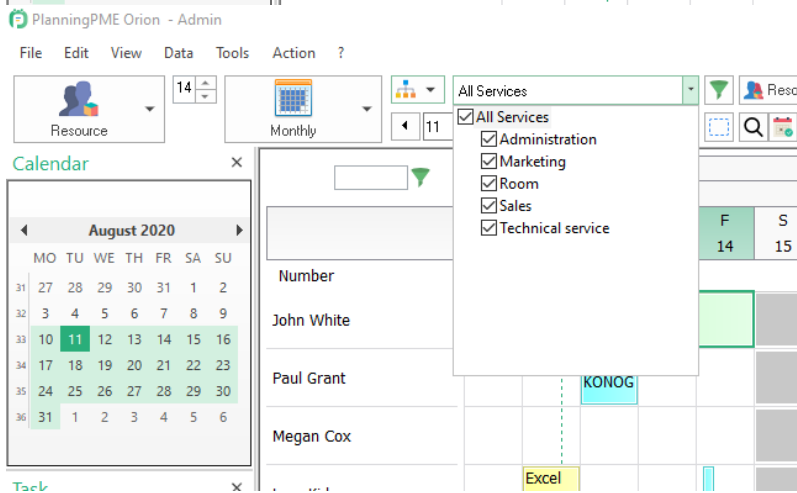
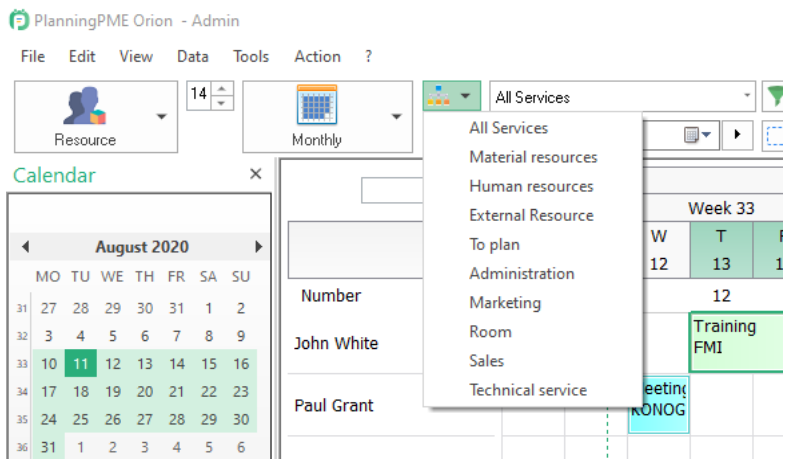
The screenshot shows a window titled "Resource : John White" with a close button (X) in the top right corner. The window contains several tabs: "Information", "Timetables", "Skill", "Unavailability", "Shared calendar", and "Events". The "Information" tab is currently selected. Below the tabs, there are several fields and options:

- Label :** A text box containing "John White" and a small icon of a person.
- Type :** Four radio buttons: "Human" (selected), "Material", "To plan", and "External".
- Colors :** Two dropdown menus: "Background" (showing a white square) and "Text" (showing a black square).
- Department :** A dropdown menu showing "Administration". A tooltip "this resource" is visible over the dropdown.
- Manager :** A list of checkboxes: "All Services", "Administration" (checked), "Marketing", "Room", "Sales", and "Technical service".
- Cost €/H :** A text box.
- ID :** A text box.
- Name :** A text box.

Proceed the same way for all your resources. You can assign your resources to several departments.

Display one or more departments on the screen

You can filter by one or more departments from those filters:



Resources order by department

From the menu Data -> Department

To change the resources order, go to the menu Data -> Department.

The order is different for each department.

Change the resources order via a drag and drop or clicking on the top of the column name and press the button "Save order".

Department

Define the structure of your business with your departments and resources

Filter

My company (16)

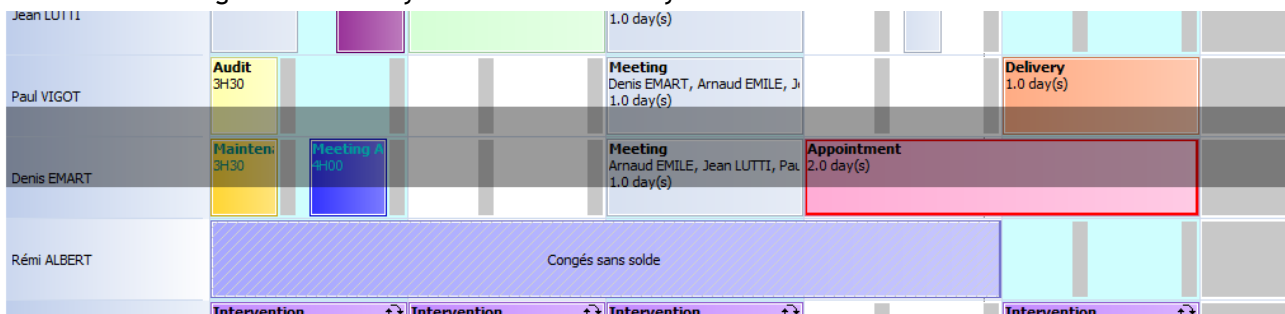
- Administration (3)
- Marketing (3)
- Room (3)
- Sales (3)
- Technical service (3)

Drag a column header here to group by that column.

| DEPARTMENT | LABEL | TYPE | NAME | FIRST NAME | TIMETABLES | HIDE |
|-------------------|-------------------|----------|------|------------|--------------|------|
| Administration | John White | Human | | | Default Slot | No |
| Administration | Paul Grant | Human | | | Default Slot | No |
| Sales | Megan Cox | Human | | | Default Slot | No |
| Administration | Lucy Kidman | Human | | | Default Slot | No |
| Sales | Daniel Pitt | Human | | | Default Slot | No |
| Sales | Jackie Washington | Human | | | Default Slot | No |
| Marketing | Jocelyne Durand | Human | | | Default Slot | No |
| Marketing | Ben Craig | Human | | | Default Slot | No |
| Technical service | Marleen Perry | Human | | | Default Slot | No |
| Marketing | Christian Damon | Human | | | Default Slot | No |
| Technical service | François Biting | Human | | | Default Slot | No |
| Technical service | Kevin Hanks | Human | | | Default Slot | No |
| Room | Room1 | Material | | | Default Slot | No |
| Room | Room2 | Material | | | Default Slot | No |
| Room | Room3 | Material | | | Default Slot | No |
| | To plan | To plan | | | Default Slot | No |

Drag and Drop from the screen

You can also change the order of your resources directly on the screen.



Time Profiles

Create time profile

Got to the menu Data -> Time profiles.

Time profiles

Filter

| LABEL | HOURS | CAPACITY | DAYS |
|--------------|-------|-----------------|-------|
| 60 | 39h00 | Number of hours | MTWTF |
| 80% | 32h00 | Number of hours | MTWT |
| Default Slot | 35h00 | Number of hours | MTWTF |
| m | 39h00 | Number of hours | MTWTF |

You can create as many profiles as needed.

Here is the procedure:

- Click on the button « Add »

Time profile

Label: 80%

32h00

Define work capacity relying on: ☐ Slots ☒ Number of hours

| Day | Slot | Value |
|---|-----------|-------|
| <input checked="" type="checkbox"/> Monday | Morning | 8 |
| <input checked="" type="checkbox"/> Monday | Afternoon | 8 |
| <input checked="" type="checkbox"/> Tuesday | Morning | 8 |
| <input checked="" type="checkbox"/> Tuesday | Afternoon | 8 |
| <input checked="" type="checkbox"/> Wednesday | Morning | 8 |
| <input checked="" type="checkbox"/> Wednesday | Afternoon | 8 |
| <input checked="" type="checkbox"/> Thursday | Morning | 8 |
| <input checked="" type="checkbox"/> Thursday | Afternoon | 8 |
| <input type="checkbox"/> Friday | | |
| <input type="checkbox"/> Saturday | | |
| <input type="checkbox"/> Sunday | | |

- Enter a name for your new profile and fill in the slots information
- If your employee attendances are the same one week to another, tick on « Define work capacity in function of slots ».
- If your employees working hours change from a week to another, tick on « Define the capacity in function of number of hours ».

You can create specific weekly slots for each employee.

Visually, on the schedule, greyed days will correspond to non-worked days.

Assign a time profile to a resource

Open the card of the resource, go to the tab “Slots” and select a profile.

Resource : John White

Information Timetables Skill Unavailability Shared calendar Events

Profile: 80%

32 hours a week

Define work: ☐ Slots ☒ Number of hours

| Day | Slot | Value |
|---|-----------|-------|
| <input checked="" type="checkbox"/> Monday | Morning | 8 |
| <input checked="" type="checkbox"/> Monday | Afternoon | 8 |
| <input checked="" type="checkbox"/> Tuesday | Morning | 8 |
| <input checked="" type="checkbox"/> Tuesday | Afternoon | 8 |
| <input checked="" type="checkbox"/> Wednesday | Morning | 8 |
| <input checked="" type="checkbox"/> Wednesday | Afternoon | 8 |
| <input checked="" type="checkbox"/> Thursday | Morning | 8 |
| <input checked="" type="checkbox"/> Thursday | Afternoon | 8 |
| <input type="checkbox"/> Friday | | |
| <input type="checkbox"/> Saturday | | |
| <input type="checkbox"/> Sunday | | |

On the example below, Jean Marc do not work on Wednesday.

| | | | | | | | | |
|------------------|--|--|--|--|--|--|--|--|
| Jean-Marc LELONG | | | | | | | | |
| Arnaud EMILE | | | | | | | | |

Job contracts

Go to the tab "Timetables" in the resource card. Put your mouse in a blank space in the contract table and right click on the mouse. Then select "Add".

Enter a name for your contract: Ex: FULL TIME, PART TIME etc ...

Choose a beginning date for your contract and an ending date if needed.

For each resource, you can create a specific contract.

On the schedule, the non-working periods appear in grey.

Skills

Create and assign skills to your resources and to your tasks depending on your activity.

Allocate a task requiring specific skills to resources with those specific skills.

You can look for skilled resources available for a mission.

► **Manage easily skills of your resources**

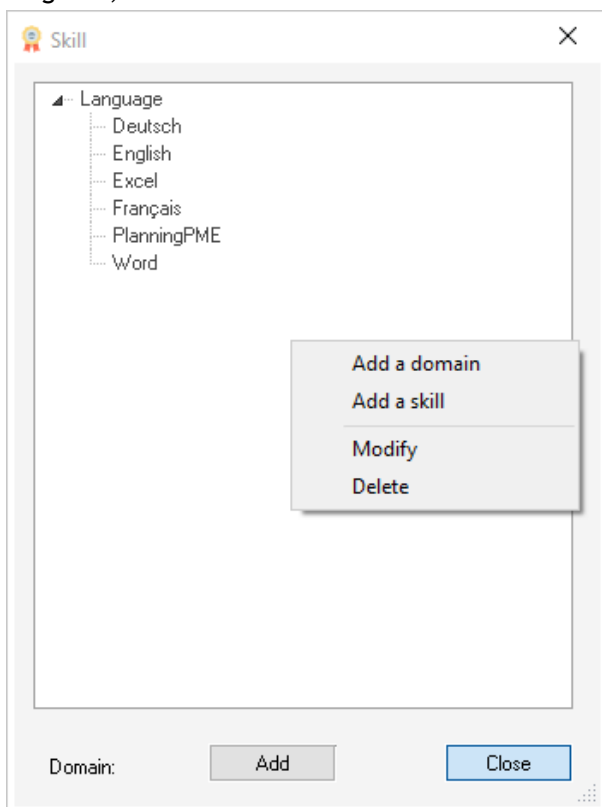
How to create domains and skills?

First, create specific skills depending on your activity.

From PlanningPME, Go to the menu “Data” -> “Skill”

You can create different domains and skills.

One domain is composed of several skills for example the domain “Language” is composed of the skills “English”, “French”...



To create a field, put your mouse on a blank space of the window. Click on the right button of the mouse.

Then choose “**Add a domain**”

Type a name to your field. Then “save”.

Select the domain where you want to add your skill then “right click” with your mouse and select “Add a skill”. Type a label. Then “save”.

Following the same process, you can create as many domains and skills as wanted.

Modify or delete a skill, right click on it and select “modify” or “delete”.

Assign skills to your resources

You can assign skills to your resources in just some clicks. Here is the way to proceed:
Open the card of a resource and go to the tab "Skills".
Click on the button "Assign skills" and make your selection.

Assign skills to your tasks

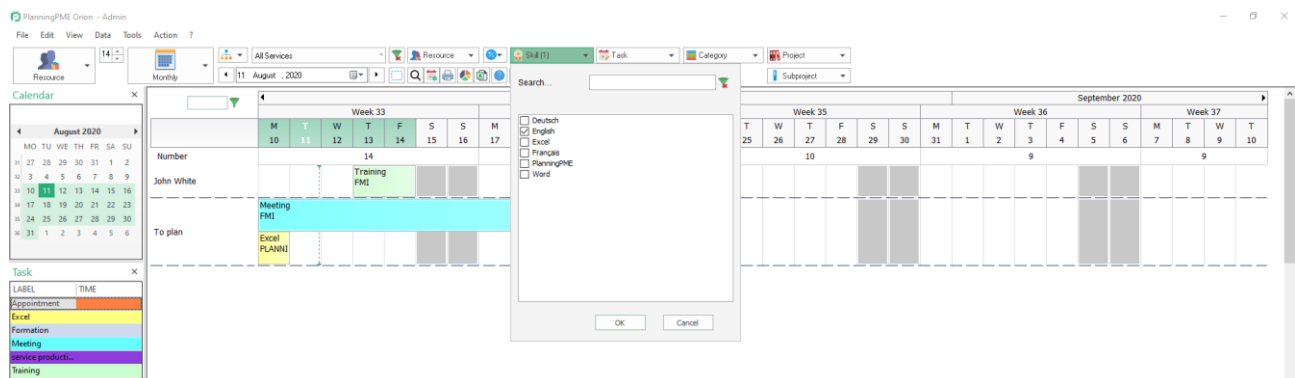
From the menu "Data" -> "Task", open the task card and assign skills clicking on the button "Assign".

Check for skills adequacy

Once your skills assigned to your resources and tasks, the software will check the skills adequation between tasks and resources.

Filter skilled resources on the planning board

To extract from the schedule skilled resources, you can play with the filter "Skill" at the top left side of your screen.

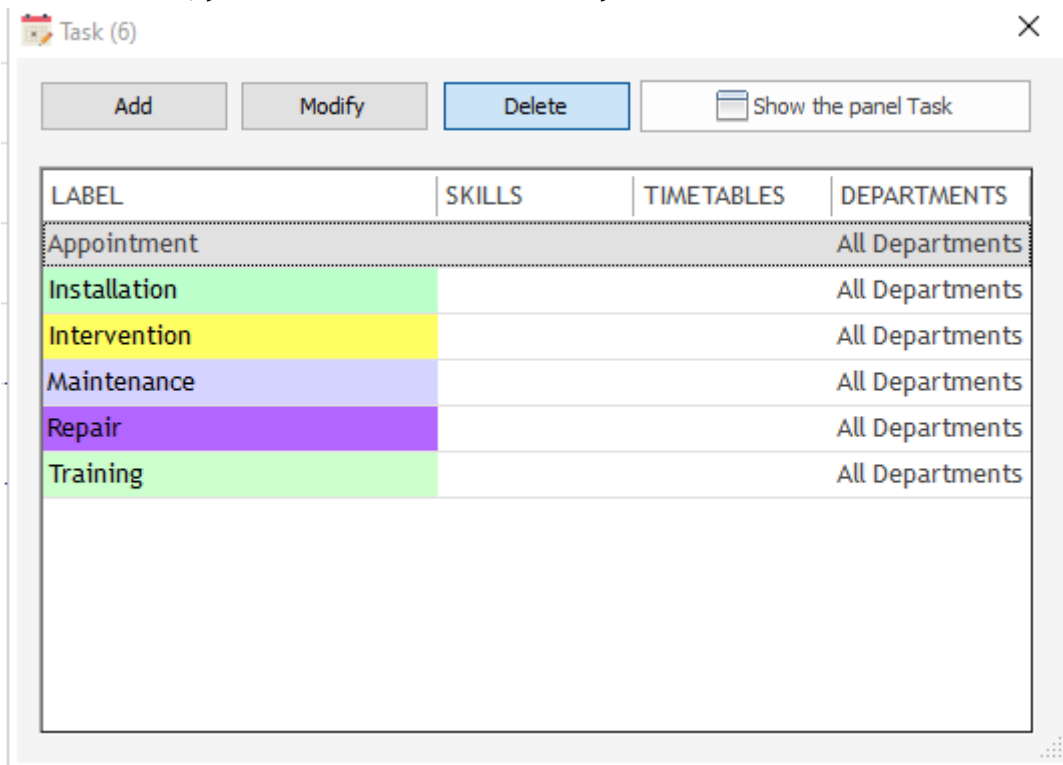


Tasks list

Customise your list of tasks

From PlanningPME, go to the menu “Data” -> “Task”

From this menu, you can find all the labels already created.



To add a new label, click on "Add" and type a new label before saving.

The screenshot shows a 'Task' dialog box with a close button (X) in the top right corner. The dialog box contains the following fields and options:

- Label:** A text input field containing the word 'Training'.
- Colors:** Two dropdown menus for 'Background' (set to light green) and 'Text' (set to black).
- Departments:** A section with a checked checkbox labeled 'All' and a dropdown menu set to 'All Services'.
- Timetables:** A section with a 'Type' label and three radio buttons: 'None' (selected), 'Duration', and 'Time'.
- Skills:** A section with an 'Assign' button and an empty text input field.
- Buttons:** 'OK' and 'Cancel' buttons at the bottom right.

Then, you have several options available to customize your tasks.

- Define the label
- Change the text and background colors
- Assign to specific departments
- Assign hours
- Assign skills

Events category

For each single event created on your schedule, you can assign a category. As an example, you can tell whether an event is important or not, if a booking is confirmed or not.

Then, you can filter the schedule to have events of a certain category displayed.

Define the list of categories

From PlanningPME, go to the menu "Data" -> Category"

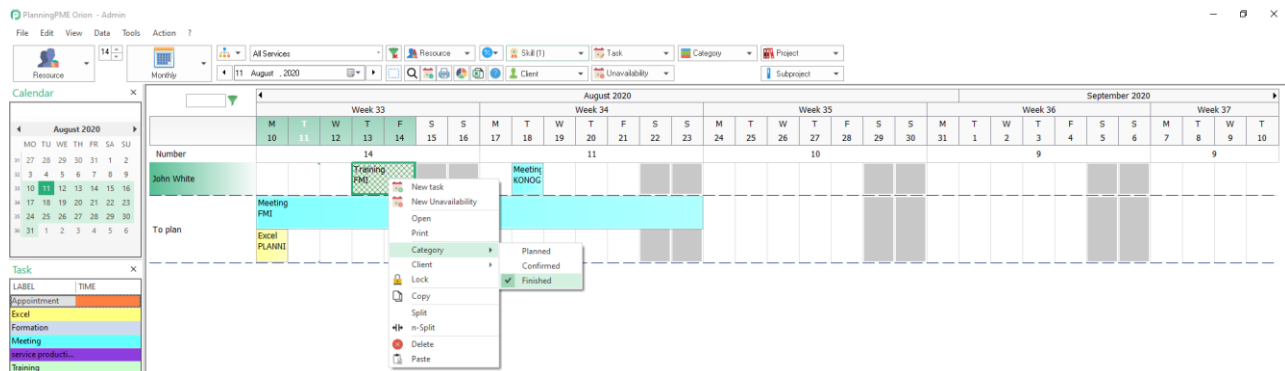
The screenshot shows the 'Category' dialog box. On the left, under 'Colors of the events', there is a list of three categories: 'Weak' with a green background, 'Normal' with a blue background, and 'Urgent' with a red background. Below this list is a note: 'The first color will be that by default.' On the right, the 'Color description' section contains a 'Label' text field, 'Text' and 'Background' color pickers (both set to their default colors), and a 'Hatching' checkbox which is currently unchecked. At the bottom of the dialog are four buttons: 'Add', 'Modify', 'Delete', and 'Close'.

To add a category, type a label, then select the text and background colors and press the button "Add". You can also select **hatching for the category**.

NB: Each event created on the planning will be by default of the first category of the list. For example, “Not Confirmed” in the example below.

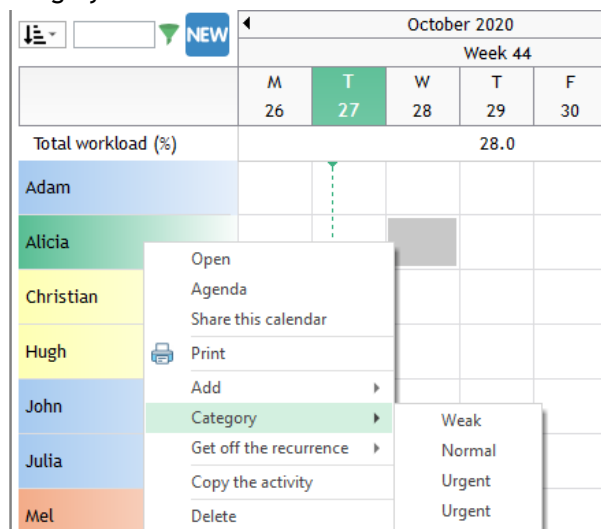
Assign a category to an event

A category may be assigned to each event created in the schedule. This can be modified by a simple right click on the event. With the use of hatching the categories may be more easily visible on the screen.

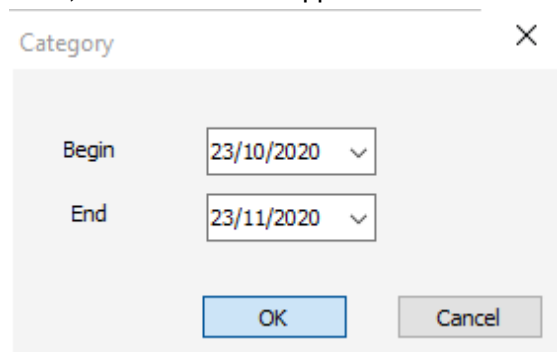


Fast change of the category for several events of one resource

You can change the category of several events assigned to a resource via a right click on the resource and then "Category".



Then, this window will appear:



All events included between the dates selected will have their category changed in one shot.

Have the category displayed on the schedule

- 1- If you have added some hatchings to your category, you will see them directly on the planning:

| | |
|--------|-------------|
| Alicia | Appointment |
|--------|-------------|

Here, you have a double information: The color is the color selected for the task label and the hatching represent the category of this event.

- 2- You can display events in function of the color of the category on the screen from the menu "Tools" -> "Options" -> "View" -> Color depending on Category. The background color of the event will then be the color of the category of the event.
- 3- You can also filter events of one particular category from the filter at the top right-hand side corner.

Unavailabilities list: Absences, vacations, leaves

You can manage days off (holidays, illness...) of your employees and non availabilities of your material resources. A report shows you your employees' days off: which type of days off, the number and the days remaining.

Customise your list or unavailability

Pre-recording of the unavailabilities list

From PlanningPME, go to the menu "Data" -> "Unavailability"

Click on the button « Add », select the label of your unavailability the color and save it.

| LABEL |
|--------------------|
| Annual Leave |
| Compensatory leave |
| Sick leave |
| Vacation |

Visualise your days off

Visualise all your employees leaves

Open the card of one of your resource and go to the tab « Unavailability ». The list of all leaves of each employee for each year can be visualized:

Resource : Alicia ✕

Information | Timetables | Skill | **Unavailability** | Shared calendar | Events

Period : 2020

| Unavailability | Duration | Period |
|--------------------|-------------|-------------------------|
| Annual Leave | 0.00 day(s) | 01/06/2020 - 31/05/2021 |
| Compensatory leave | 0.00 day(s) | 01/06/2020 - 31/05/2021 |
| Sick leave | 0.00 day(s) | 01/06/2020 - 31/05/2021 |
| Vacation | 0.00 day(s) | 01/06/2020 - 31/05/2021 |

[Counter](#) [History](#)

History... [OK](#) [Cancel](#)

To know exactly when your employees were off, click on the line and select button “History”.

Counter: You can put a visual counter for each label.

General Setting for the count

Go to the menu « Tools » -> « Days Off ».

Fill in the information depending on your activity.

Days off ... ✕

| | |
|----------------------|--|
| Beginning Days off: | 01- juin |
| Days off on : | <input checked="" type="radio"/> 5 days <input type="radio"/> 6 days |
| Number of days off : | 25 |
| Label for days off | Annual Leave |

☐ Time savings account

OK Cancel

Beginning Days Off: From which day are calculated your days off? For most of the company, the first day for the calculation is the 1st of January.

Days Off on: On 5 or 6 days?

If, for example, you select 5 days and that your employee is on vacation during 3 weeks, there will be 15 days counted.

Number of days off / Label for days off: Filling that two information will add a counter by default for all your resources for the label selected.

Events status

You can manage your own public holidays from the menu Data -> Public holiday

Definition

For each event of the schedule like a task or an unavailability, you will be able to specify a status.

For example, you will be able to precise:

if a day off is in the “on request” or “validated” status

- if a meeting is in the « Not started » or « Finished » status for example

A status is represented by a coloured vertical bar to the left of the event rectangle.

The list of the task and unavailability status is entirely customized according to your business.

How to activate the status ?

To begin with, activate the option in the menu Tools -> Options -> Event and select what you want to activate :

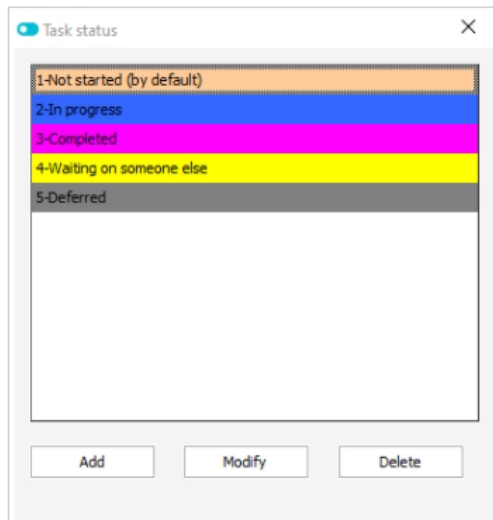
- Activate the status for the tasks

- Activate the status for the unavailabilities

Customize your status list

You can define two list of distinct status directly from the menu “Data”:

- Task status: customize your status list for the event such as “Tasks”
- Unavailability status: customize your status list for the events such as “Unavailabilities”



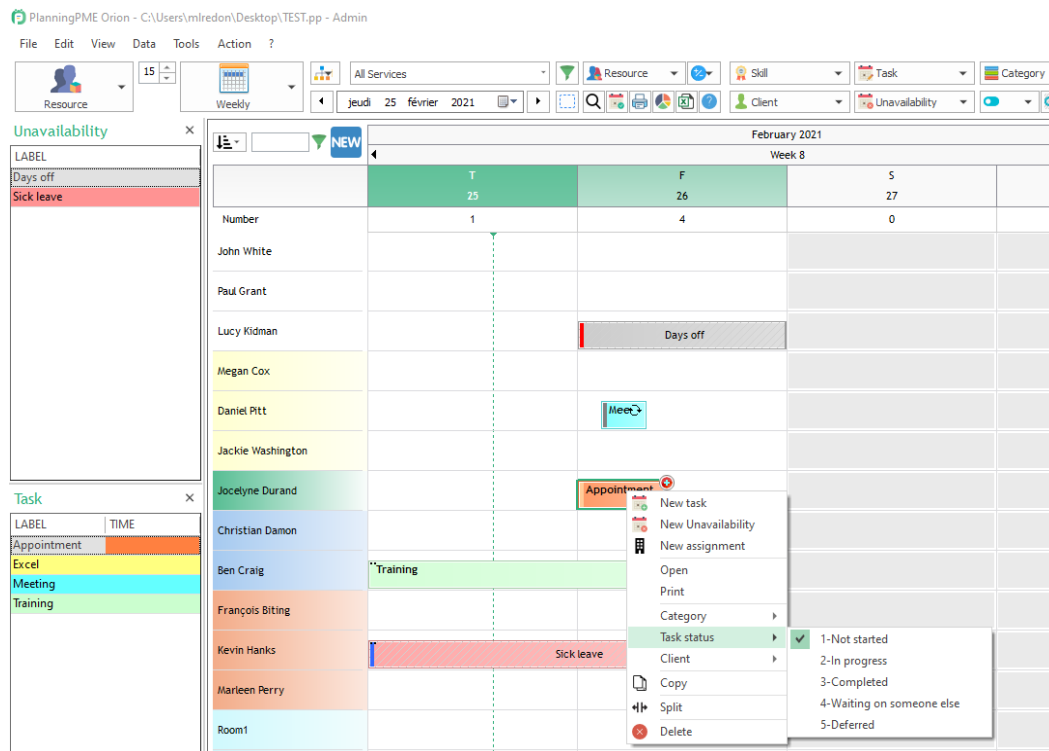
Define the label and text and background colours.

You can also specify the status by default when creating a new event on the schedule.

Assign a status to an event

For each event created on the schedule, you can also assign a status to the event.

Then, you will be able to modify it with a simple click on the event:



Filter the schedule by status

You can also use the filters “Task status” and “Unavailability status” at the top of your screen to filter the events in the schedule

Refer to the chapter Filters in the schedule.

Access right management

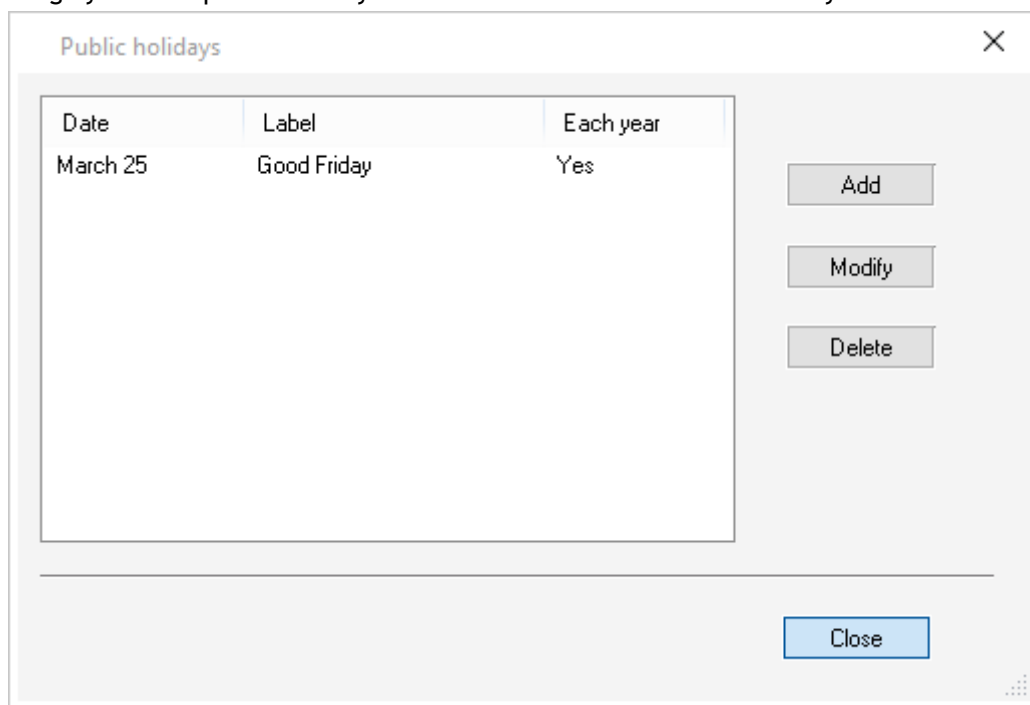
Refer to the Rights Management chapter

Rename "Task status" and « Unavailability status » with your own words

From the menu « Tools » -> "Labels and formats", you have the possibility to rename these labels “Task status” and “Unavailability status” with your own words.

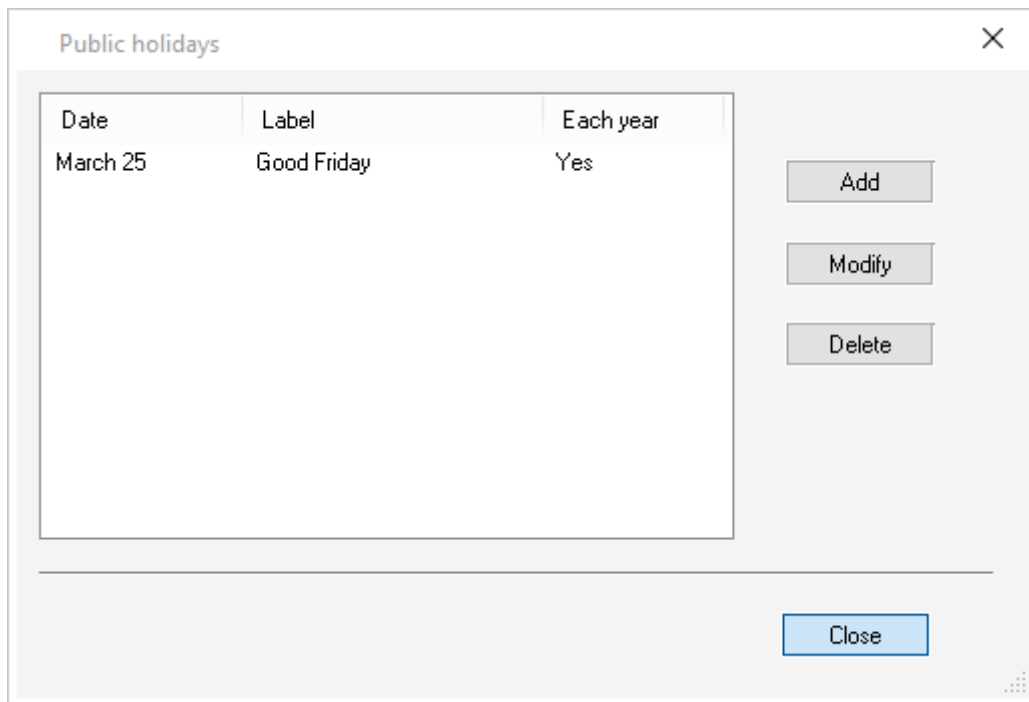
Public holidays

You can manage your own public holidays from the menu Data -> Public holiday



| Date | Label | Each year |
|----------|-------------|-----------|
| March 25 | Good Friday | Yes |

Buttons: Add, Modify, Delete, Close



Then, you will see them on the planning board with a different column color:
 This color is the one you selected for “Public holiday” from the menu Tools -> Options -> Display

Clients

You can manage your clients within PlanningPME. The number of clients is not limited.

If you already have a client database, it is possible to import it in PlanningPME in order to avoid double typing all the information. Target Skills can develop some scripts to do this import or you can use the function to import from a txt file from the menu File -> Import -> Client.

Activation of the option

First of all, go to the menu “Tools” -> “Options” -> “Data” and select the option “Activate customers”. Select the type of your clients (Individual or Company) and the number of clients by event and then save. You now have a new feature “Client” from the menu “Data”.

Add, modify and delete clients

Client (6) X

Filter ▼ Add Modify Delete Import 👤

Drag a column header here to group by that column.

| NUMBER | CLIENT | NAME | FIRST NAME | CITY |
|--------|---------------|------|------------|------|
| | Dengel | | | |
| | FMI | | | |
| | PPMECA | | | |
| | PPMECH | | | |
| | PPMENL | | | |
| | Target Skills | | | |

Go to the menu “Data” -> “Client”.

You can add, modify, hide or delete your clients from here.

Here are all the details you can add for each client:

Client : TARGET SKILLS X

Informations Events

Type : ☐ Individual ☒ Company 👤

Company :

Number: ☐ Hide this client

Colors : Background : ■ Text : ■

Contact: Miss ▼

Address :

ZIP: City :

Country State

Floor: Building: Door code:

Phone: Mobile:

FAX:

E-Mail:

Website:

History OK Cancel

Import your client's database

In order to save time, you can import your client's database from the menu: File -> Import -> Clients. Check the "Import" section to know more.

Projects

With PlanningPME, you can manage your projects and if needed, your subprojects specifying for each event the associated project.

Activation of the option Project


From the menu Tools -> Options -> Data, activate the option: "Activate Projects"

Add, modify and delete projects

From the menu "Data" -> "Project" you can add, modify or delete your projects from here. Here are all the details you can add for each project:

Project : Project AF1001 ✕

Project | Events

Label : 

Colors : Background : Text : ☐ Hide this project

Client

Department ☒ All

Manager :



History...

From the “Project” icon within the event window

While creating a new event on the schedule, you can associate a project to this event.



Event

General


Project : Project AF1001  

Task : Appointment

Status : 2-Confirmed

Client : Target Skills  

Resource : ☒ Only one ☐ Several To plan

Beginning : 02/11/2020 09:00 ☒ All day  Recurrence

End : ☒ 03/11/2020 18:00 Morning Afternoon

Duration : ☐ 2.00 (D)



0 characters ☐ Reminder :



OK Cancel



While creating a new event on the schedule, you can also create a new project directly via a click on the "Project" red icon:



The project card will then open and you can create a new project. This project will be added on your list of projects and you will be able to select this project directly next time:


General info Successors

Project : Project C  

Event :   Not confirmed

Client :  

Resource :  

Beginning :  Recurrence

End : ☒ 00:00 Break 00:00

Duration : ☐ 1.00 (D)

Project A
Project A001
Project A002
Project A003
Project A004
Project A005
Project A006
Project B
Project C

Once the project selected, from this icon, you can open the card of the project and make modifications if needed.

From the “Project” view

Right click on left column and select « Add Project».

Project

15

Weekly

All Departments

mardi 27 octobre 2020

NEW

bla

Project 1

Project 2

Project 3

Project 4

Project 5

Project AF1001

Project A

Project B

Add

Open

Delete

Project

Indicator-Column

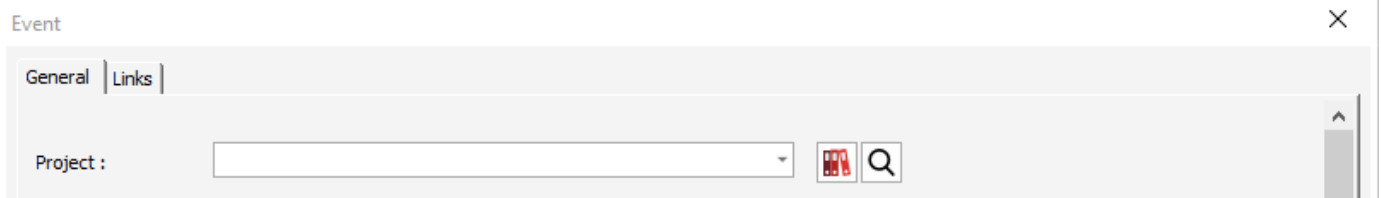
| | M 26 | T 27 |
|----------------|-------------|---------|
| bla | | |
| Project 1 | | |
| Project 2 | | |
| Project 3 | | |
| Project 4 | | |
| Project 5 | | |
| Project AF1001 | Appointment | |
| Project A | | |
| Project B | | |

You can also open the card of your project and delete it from here.

Search for a project

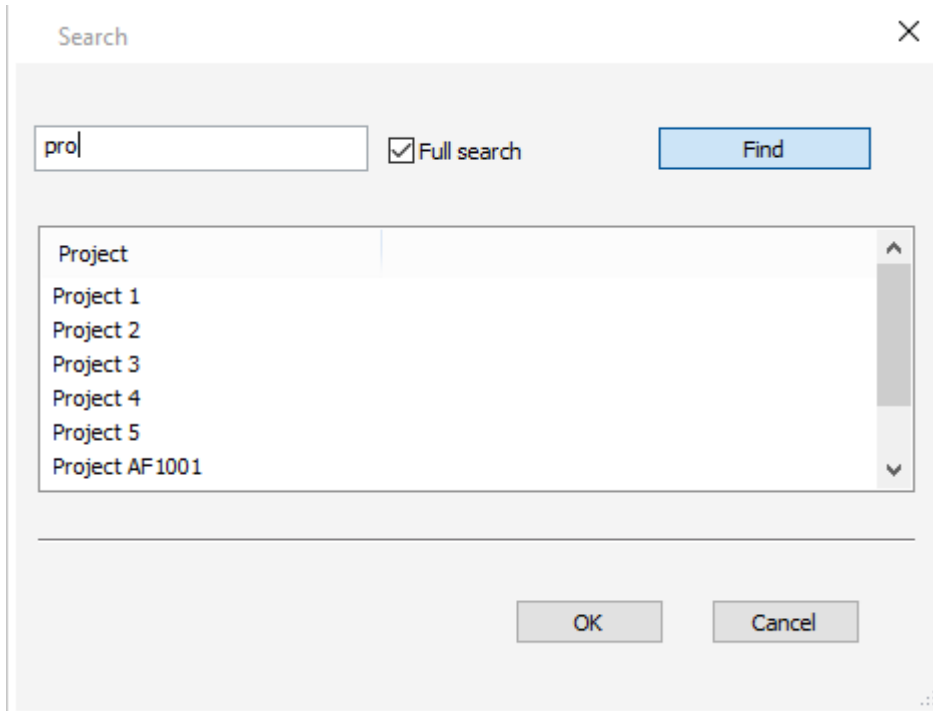
Search from the “glass” icon in the event window

While creating a new event, you have a search on your projects in order to save time when you have a long list:



The screenshot shows a window titled "Event" with a close button (X) in the top right corner. Below the title bar, there are two tabs: "General" and "Links". Under the "General" tab, there is a label "Project:" followed by a text input field. To the right of the input field are two icons: a red folder icon and a magnifying glass icon.

Clicking on the “glass” icon, you will then have this search window:

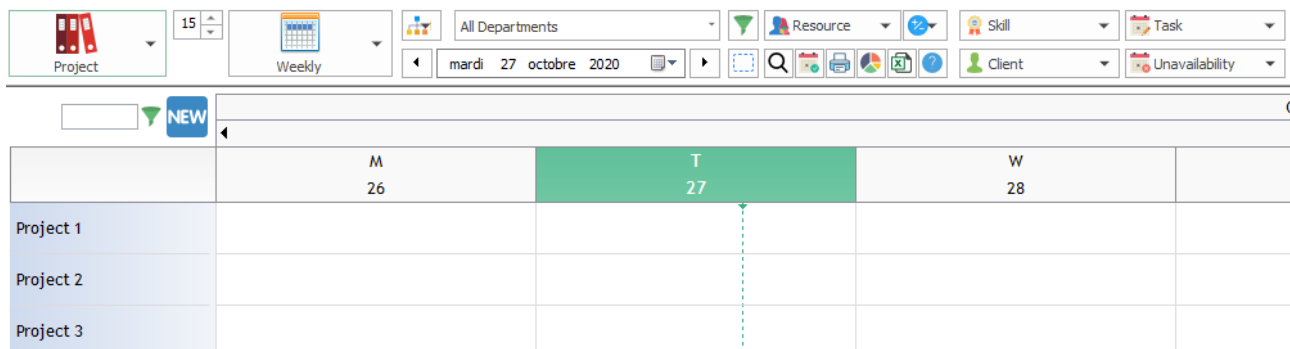


The screenshot shows a window titled "Search" with a close button (X) in the top right corner. Below the title bar, there is a text input field containing the text "pro". To the right of the input field is a checkbox labeled "Full search" which is checked. To the right of the checkbox is a blue button labeled "Find". Below the input field and checkbox is a list box containing the following items: "Project", "Project 1", "Project 2", "Project 3", "Project 4", "Project 5", and "Project AF1001". Below the list box are two buttons: "OK" and "Cancel".

You can make your search on the name of the project.

Search from the project view

Type a part of the name of your project and the planning board will be filtered rapidly:



The screenshot shows a project planning board interface. At the top, there is a toolbar with various icons and dropdown menus. Below the toolbar, there is a search bar with a magnifying glass icon and a "NEW" button. The main area of the interface is a table with columns for days of the week (M, T, W) and rows for projects (Project 1, Project 2, Project 3). The table is filtered to show only the projects that match the search criteria.

| | M 26 | T 27 | W 28 | |
|-----------|---------|---------|---------|--|
| Project 1 | | | | |
| Project 2 | | | | |
| Project 3 | | | | |

Search from search window (Edit -> Search or CTRL + F)

Type a part of the name of your project and all the events will be listed:

Find

Q Year

The symbol * means that some text is located before or after the keyword.

| 4 types of search | Search example | Result example |
|------------------------------------|----------------|-----------------------------|
| Exact search | Training | Training |
| Keyword at the end of the sent... | *client | Appointment with the client |
| Keyword at the beginning of the... | Intervention* | Intervention from 2pm |
| Full search | *advanced* | Word advanced training |

☐ Task ☐ Comments ☐ Client ☐ Number ☒ Project


| BEGINNING DATE | ENDING DATE | LABEL | RESOURCE | CATEGORY | CLIENT | PROJECT |
|----------------|-------------|--------------|----------|----------|--------|-----------|
| 28/10/2020 | 28/10/2020 | Intervention | John | Weak | | Project 3 |

Hide a project



In order to keep track of the past events of one project without seeing it on the planning board, you can hide it: from its card or right clicking on his name and then « hide ».

Project : Project 2

Project | Events

Label : 

Colors : Background : Text : ☒ Hide this project

Client  

Department ☒ All

Manager :

Project (6) X

Filter ▼ Add Modify Delete

Drag a column header here to group by that column.

| PROJECT ▲ | CLIENT | HIDE |
|----------------|--------|------|
| Project 1 | | No |
| Project 2 | | Yes |
| Project 3 | | No |
| Project 4 | | No |
| Project 5 | | No |
| Project AF1001 | PPMECA | No |

Delete several projects

You can delete several items from the menu Data, with the keys CTRL + DEL
 You will have a message asking you if you want to delete the items.

Assign your projects to a client

It is possible to assign several projects to one client. To do so, on the project card, you have a drop-down menu:

Project : Project 3 X

Project | Events

Label :

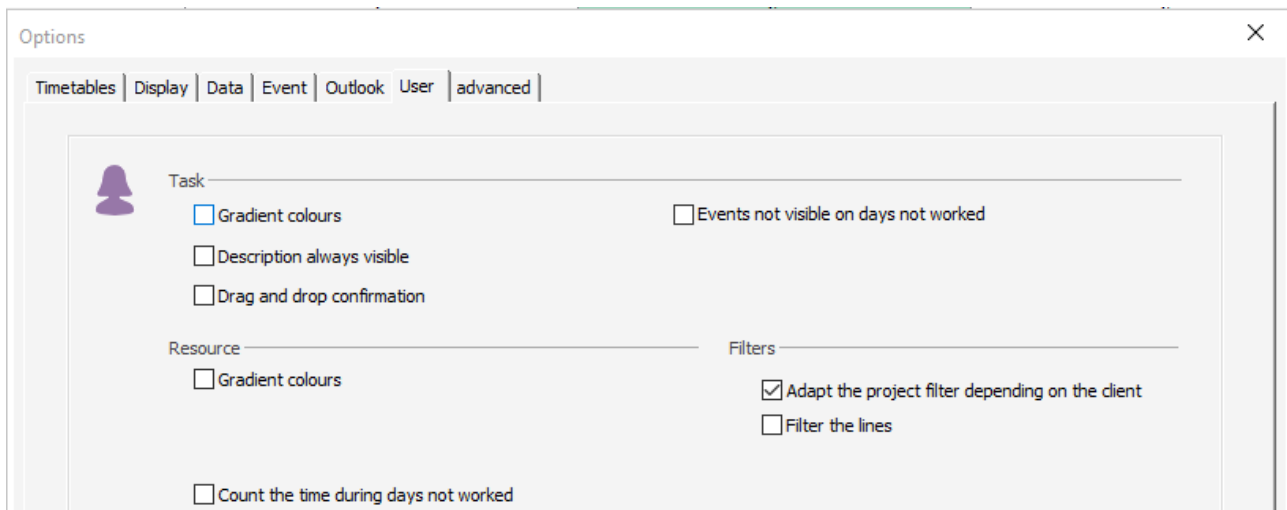
Colors : Background : ■ Text : ■ ☐ Hide this project

Client 👤 🔍

Department ☐ All

Manager :

NB: To adapt the project filter as described below, activate the option on the menu Tools -> Option -> User.



Results when filtering by client

While filtering by client, only projects associated to this client will appear on the project filter.

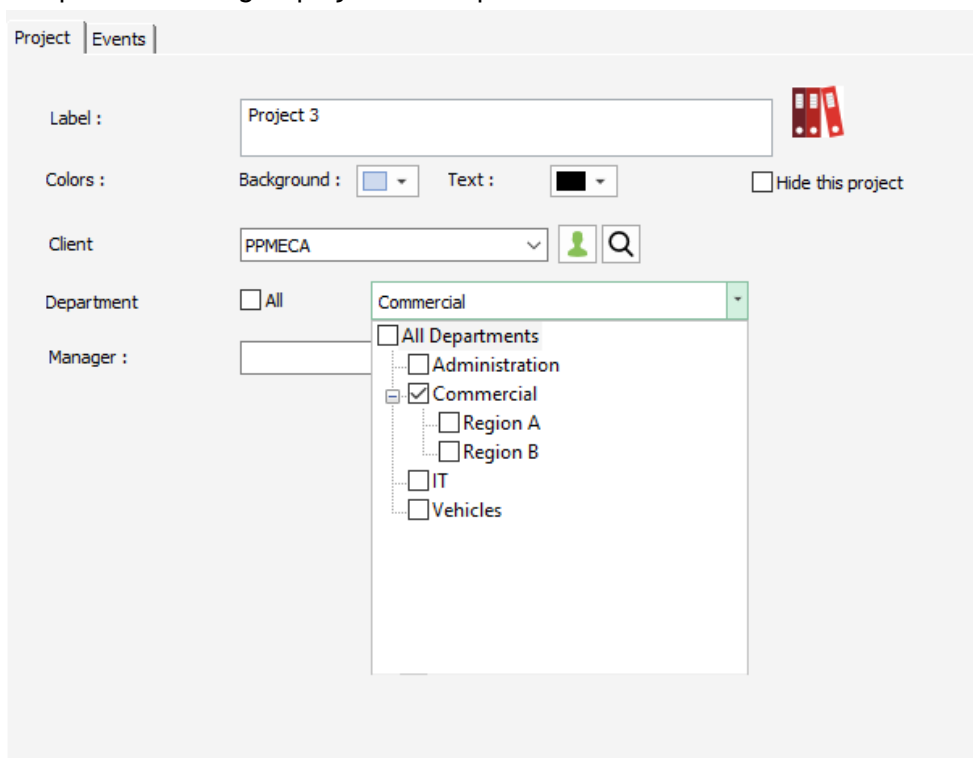
Results while creating a new event

If you select one client first, projects associated to this client will appear on the project list.

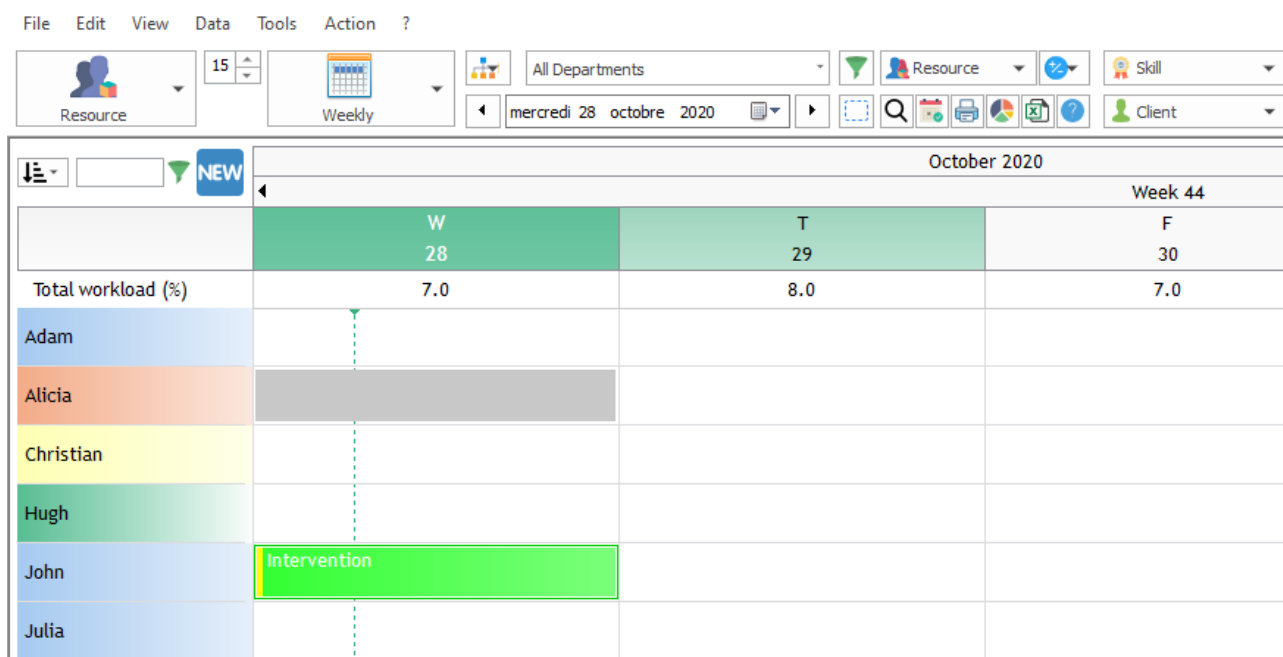
If you select a project first, the client will be selected by default on the client list.

From Version 4.1. Assign your projects to a department

It is possible to assign a project to a department.



Then, when filtering by department, only projects associated to this department will be displayed on the drop-down list.



Tab Events: follow up of events allocated to a project

From the project card, you have a tab “Events” that lists all the past and future events allocated to this project.

Project : Project 3

Project

Events

Filter

Enter filter text here

| BEGINNING... | ENDING DATE | LABEL | RESOURCE | CATEGORY | CLIENT | PROJECT |
|--------------|-------------|--------------|----------|----------|--------|-----------|
| 28/10/2020 | 28/10/2020 | Intervention | John | Weak | | Project 3 |
| | | | | | | |
| | | | | | | |

History on the project creation and updates

From the project card, you have a link “History” at the left bottom hand side corner of the window that list information about the project creation and modifications:

You know who created this project and when and who modified it:

History (2) (16 ms) ×

Filter

Drag a column header here to group by that column.

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END | PE... | KEY | USER | PR... | CLI... | CA... | RESOURCE | STATE |
|--------------|-----------|---------|-----------|-----------|-----|-------|-----|-------|-------|--------|-------|----------|-------|
| 23/10/202... | Update | Project | Project 3 | | | No | 6 | Admin | | | | Weak | |
| 23/10/202... | Creation | Project | Project 2 | | | No | 6 | Admin | | | | Weak | |

Manage subprojects with PlanningPME

You can associate subprojects to a project. This add a level to the software if needed.

Activation of the option SubProject

Projet _____

☒ Activate projects

☒ Activate subprojects

☒ Events dependencies

☐ With automatic shift

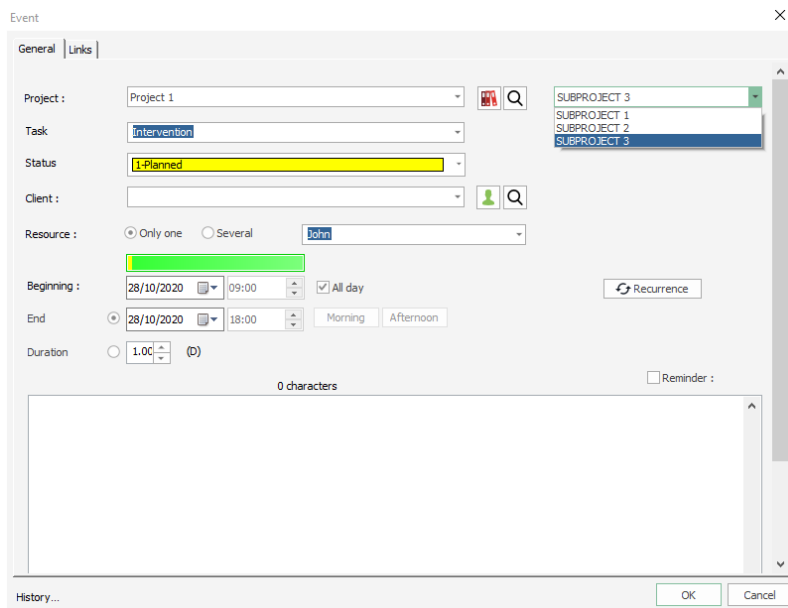
Add a subproject

Open one of the projects. You now have a tab “Subproject” where you can add some subprojects.



Assign a subproject to an event

When creating an event, you can now select the project and the subproject associated:



Options around “projects”

Customization of the terms "Project" and "Subproject".

In order to adapt PlanningPME to your activity, you can rename the label "Project" and "Subproject" from the menu "Tools" -> "Language"

Add additional fields on the Project window.

You can create additional fields on the Project window. Check chapter on Additional fields' creation.

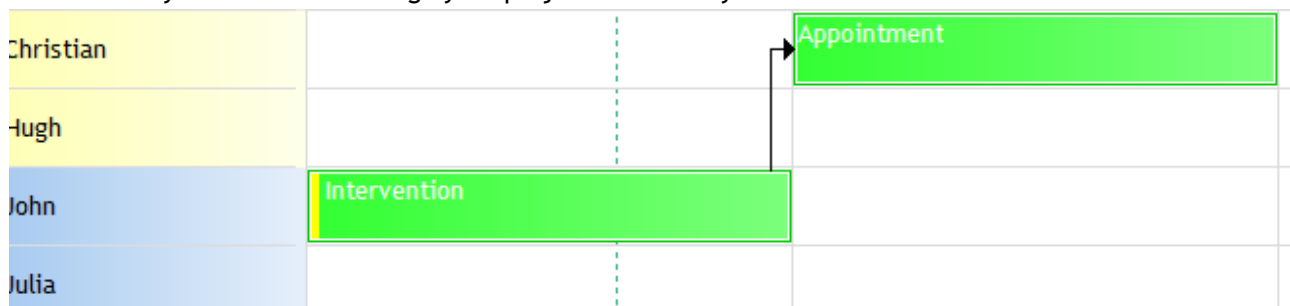
Colours in function of a project

You can now display the colours of the boxes on the screen in function of the project colour.

To activate the option, go to the menu Tools -> Options -> View and select Colours depending on "Project".

Events dependencies - Gantt diagram

You can link your events to manage your projects efficiently.



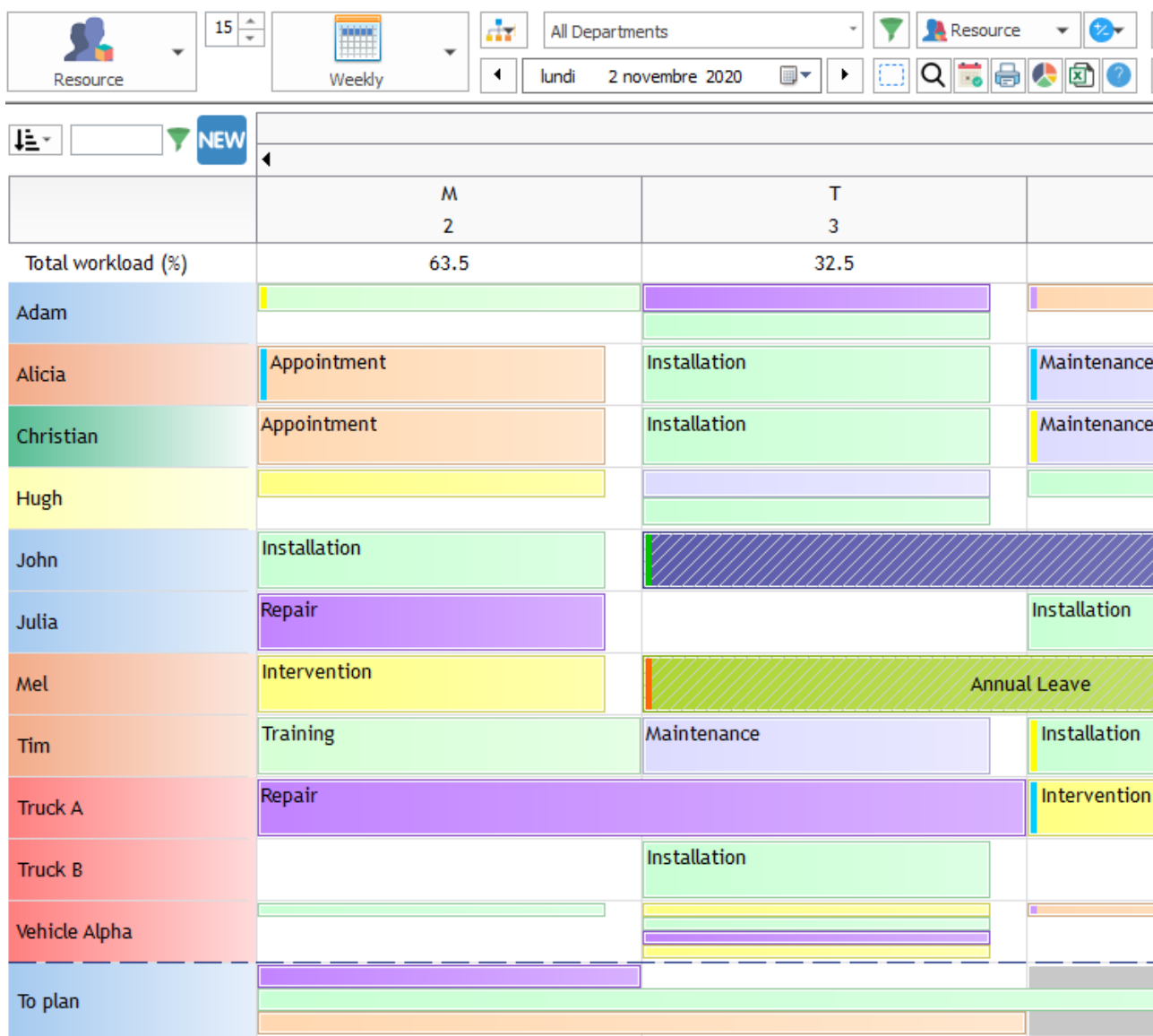
Read chapter on events dependencies to know more.

Manage your events and unavailabilities

We will describe here all the features available while creating your jobs on the planning board: create, modify, delete events/unavailabilities, copy/paste, etc...

Create your events or unavailabilities on the schedule

On the schedule, an event will be represented by a coloured rectangle and unavailability will be represented by a hatched coloured rectangle.



Create an event

Different possibilities are available to create an event on the schedule:

Draw a rectangle on the schedule with your mouse

Via a Double-click

Double click on a blank space of the planning board.

Via a right click

Go on a blank space of the schedule, click right on your mouse and select "New task".

Go to the menu Action -> Task

- With the shortcut CTRL + N

Then, the following window appears:

Event

General | Links

Project : [dropdown] [icon] [icon] [dropdown]

Task [dropdown]

Status [dropdown]

Client : [dropdown] [icon] [icon]

Resource : ☒ Only one ☐ Several [dropdown]

Beginning : 02/11/2020 [calendar] 09:00 [time] ☒ All day [Recurrence]

End ☒ 02/11/2020 [calendar] 18:00 [time] Morning Afternoon

Duration ☐ 1.00 [spin] (D)

0 characters

☐ Reminder :

OK Cancel

Type a text in the label or select one on the dropping list.

The label are saved on the menu "Data" -> "Task"

Then, select the dates and hours for this task and save it clicking on OK.

A coloured rectangle appears on the schedule.

Intuitive typing of the tasks label

Event

General | Links

Project :

Task :

Status :

Client :

Resource : ☐ Only one ☐ Several

Beginning : ☒ All day

End : ☐

Duration : ☐ 1.00 ☐ (D)

☐ Reminder :

0 characters

When typing the beginning of a task label, the program now suggests some of the labels pre-registered in order to save time.

Create unavailability

Different possibilities are available to create it:

Draw a rectangle on the schedule with your mouse

Draw a rectangle on the schedule with your mouse pressing the key "CTRL"

Via a right click

Go on a blank space of the schedule, click right on your mouse and select "New unavailability".

Go to the menu Action -> Unavailability

In all cases, the following window appears. You just have to select your unavailability and enter dates and hours the same way as when you create event.

Unavailability

General

Unavailability:

Status:

Resource:

Beginning: ☒ All day

End: ☒

Duration: ☐ (D)

☐ Reminder :

History...

Type a text in the label or select one on the dropping list.
The label are saved on the menu Data » -> « Unavailability »
Then, select the dates and hours for this unavailability and save it.

Results on the screen:

| | | | | | |
|-----------|--------------|--------------|--------------|-------------|--------------|
| Adam | | | | | |
| Alicia | Appointment | Installation | Maintenance | Appointment | Training |
| Christian | Appointment | Installation | Maintenance | Repair | |
| Hugh | | | | | |
| John | Installation | Vacation | | | |
| Julia | Repair | | Installation | | Sick leave |
| Mel | Intervention | Annual Leave | | | Appointment |
| Tim | Training | Maintenance | Installation | Maintenance | Intervention |
| Truck A | Repair | | Intervention | Maintenance | Repair |
| | | Installation | | | Intervention |

The unavailability appears with hatchings.

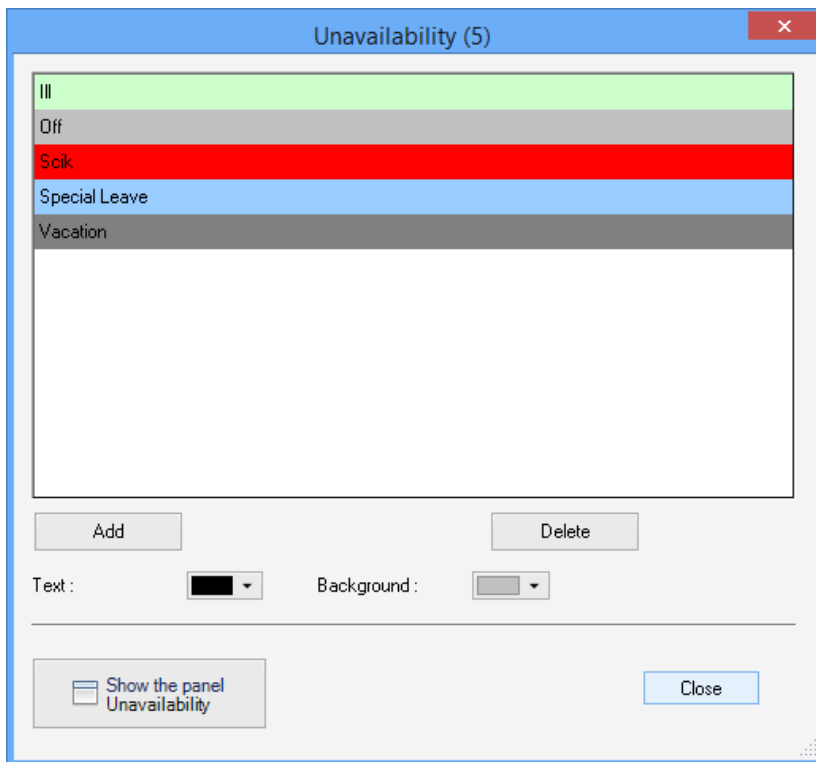
Panels to create events and unavailabilities with a drag and drop

You can create events and unavailabilities easily just via a drag and drop from the panel to the planning board.

The screenshot displays the PlanningPME Orion software interface. The top menu bar includes File, Edit, View, Data, Tools, and Action. Below the menu is a toolbar with various icons for resource management, task management, and navigation. The left sidebar contains several panels: 'Calendar' showing a monthly view for October 2020, 'Unavailability' with a list of unavailability types (Annual Leave, Compensatory leave, Sick leave, Vacation), 'Templates' for creating new events, and 'Task' for managing tasks. The main area is the 'Planning board' for November 2020, Week 45. It shows a grid of resources (Adam, Alicia, Christian, Hugh, John, Julia, Mel, Tim, Truck A, Truck B, Vehicle Alpha, To plan) and their scheduled events (Appointment, Installation, Maintenance, Repair, Training, Intervention, Vacation, Annual Leave, Sick leave) across the week of November 2nd to 8th. A 'Total workload (%)' row is also present. The bottom status bar shows the current date as Sunday, 08 November, 2020 at 16:00 and the creation workload as 54%.

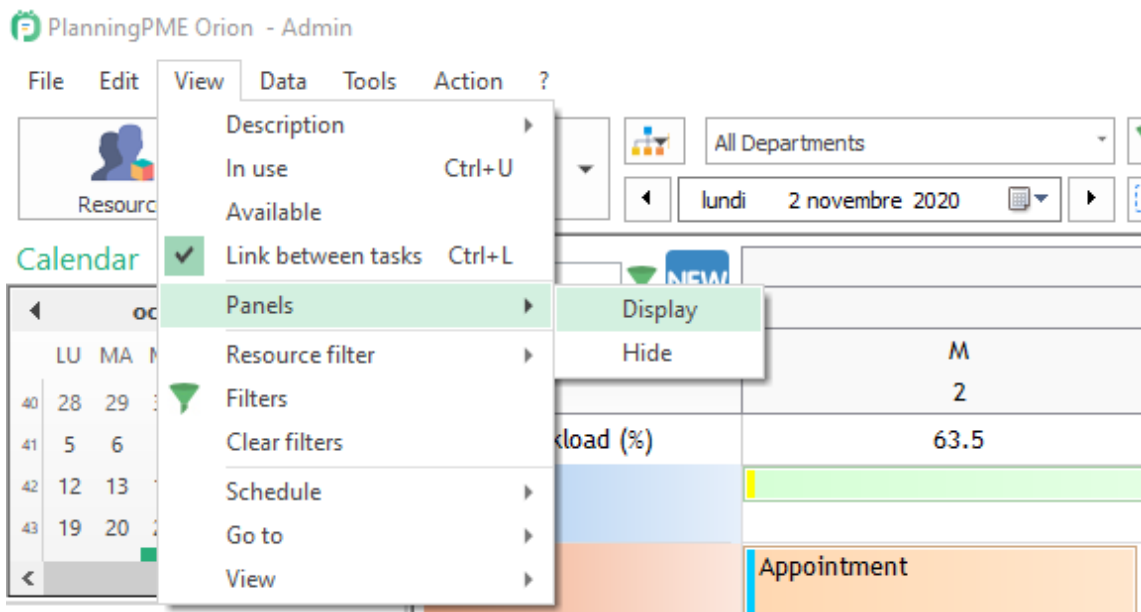
Activate from the menu Data

You can activate the panel for list of tasks, unavailability, templates, tasks to be planned from the menu data. Click on the button “Show the panel”.



Activate from the menu “View”

You can display all the panels available and then close those you do not want to show.



Depending on your settings and your use of the planning, it will be interesting for you to use them all or only one or two of them.

Below some videos:

Create your events easily via the panels

<http://www.youtube.com/watch?v=gEZBGcyOpR8>

Manage your events "on hold" or "to plan" easily

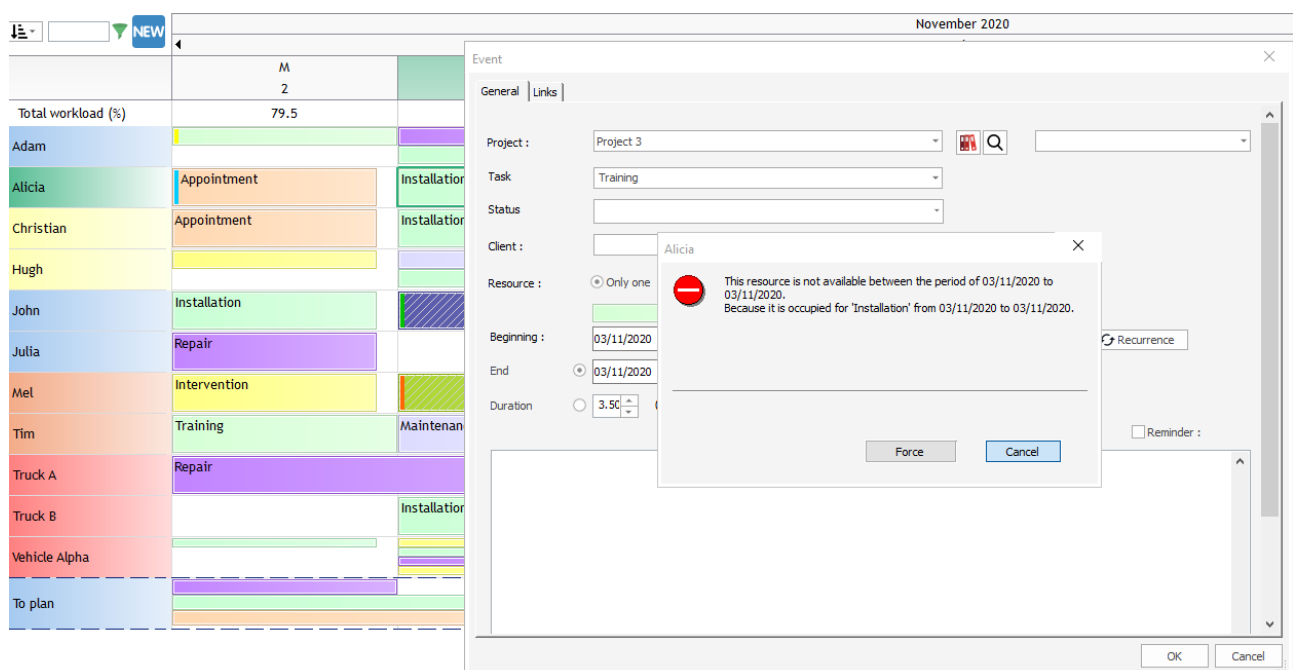
<http://www.youtube.com/watch?v=NjZsZvF7vEE>

Force the creation of an event

Even if the resource is already busy

You can now force the creation of an event even if the resource is already busy.

You will have this kind of message below.



If you press "Force Assignment", the event will be created and you will have two events on the planning as shown below:

| | | | | | |
|---------------|---------------------|--------------|---------------------|--------------------|----------------------------|
| Adam | Training | Repair | Appointment | | Repair |
| | | Installation | | | |
| Alicia | Appointment | Maintenance | Maintenance | Appointment | Training |
| | | Installation | | | |
| Christian | Appointment | Maintenance | | Repair | |
| | | Installation | | | |
| Hugh | Intervention | Maintenance | Installation | | |
| | | Installation | | | |
| John | Installation FMI | Vacation | | | |
| Julia | Repair PPMECH | | Installation | | Sick leave |
| Mel | Intervention PPMECA | Annual Leave | | | Appointment |
| Tim | Training | Maintenance | Installation PPMENL | Maintenance PPMECA | Intervention |
| Truck A | Repair | | Intervention | Maintenance Dengel | Repair PPMENL |
| Truck B | | Installation | | | Intervention Target Skills |
| Vehicle Alpha | | | | | |
| To plan | | | | | |

Otherwise, the event will not be created.

NB: If you are already a client and that you are using the users rights, this feature will not be activated by default so that the users will not have this permission. To activate it, go to the menu Data -> Group and tick on the box "Force assignment".

Group

General
Resource
Client
Options
Event
Unavailability
Project

☐ Database
☐ Purge
☐ Registration of the licences
☐ Rights of users
☐ Category
☐ State
☐ Public holidays
☐ Additional fields
☐ Days off
☐ Labels and formats
☐ Options
☐ Description
☐ Import
☐ Export
☐ History
☐ Notifications
☐ Synchronization

Definition of the structure

| | Consult | Add | Modify | Delete |
|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Department | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Profiles | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Skill | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Teams | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Constraints | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Template | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Dimensions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Current use of the schedule

| | Consult | Add | Modify | Delete |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Indicator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Milestone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

☒ Find
☒ Statistics
☒ PivotTable
☒ Copy/Paste
☒ Printing
☒ Selection/Creation mode
☒ Force assignment
☒ Force constraint
☒ Force skill

Advanced functions

☒ Burst
☒ Divide
☒ Availability
☒ Locking
☒ Unlocking
☒ Split
☒ Shared agendas
☒ Signature

☒ Offline not allowed
Timeout (s)
15
Days before
0
Days after
0

View

☒ Resource
☒ Task
☒ Client
☒ Project
☒ Map
☒ Agenda
☒ List

OK
Cancel

Even if the resource is not skilled

You can now force the creation of an event even if the resource is not skilled.

First, assign a skill to a task from Data -> Task.

| Skill | |
|-------|--|
| Excel | |

On the example above, we assign the skill Excel to the task “Training ”.*

Then, on the planning, we try to allocate the task “Training” to a resource that do not have the skill “Excel”.

You now have this message:

Do you want to force this task even if the skills are not respected?Excel

Yes No

The task will then be created.

NB: If you do not want your users to use this function, you can give this permission from the menu Data -> Group

Group X

General | Resource | Client | Options | Event | Unavailability | Project

Internal set up

- ☒ Database
- ☒ Purge
- ☒ Registration of the licences
- ☒ Rights of users
- ☒ Category
- ☒ State
- ☒ Public holidays
- ☒ Additional fields
- ☒ Days off
- ☒ Labels and formats
- ☒ Options
- ☒ Description
- ☒ Import
- ☒ Export
- ☒ History
- ☒ Notifications
- ☒ Synchronization

Definition of the structure

| | Consult | Add | Modify | Delete |
|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Department | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Profiles | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Skill | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Teams | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Constraints | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Template | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Dimensions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Current use of the schedule

| | Consult | Add | Modify | Delete |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Indicator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Milestone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

☒ Find
☒ Copy/Paste
☒ Force assignment

☒ Statistics
☒ Printing
☒ Force constraint

☒ PivotTable
☒ Selection/Creation mode
☒ Force skill

Advanced functions

☒ Burst
☒ Split
☒ Offline not allowed

☒ Divide
☒ Shared agendas
 Timeout (s)

☒ Availability
☒ Signature
 Days before

☒ Locking
☒ Unlocking
 Days after

View

☒ Resource
 ☒ Task
 ☒ Client
 ☒ Project
 ☒ Map
 ☒ Agenda
 ☒ List

Copy / Paste

Copy/Paste one event or unavailability

Select the event or unavailabilities, right click and select "Copy" (CTRL + C). Then paste it via a right click and "Paste" or CTRL + V.

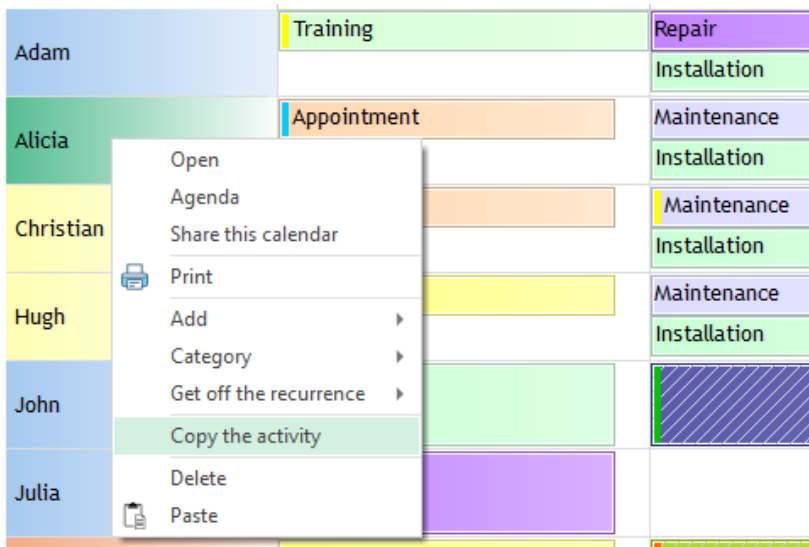
Copy/Paste several items of a resource to another

When several of your resources have the same activity (same hours, same events on a period time), you can copy the activity of a resource and paste it to another resource.

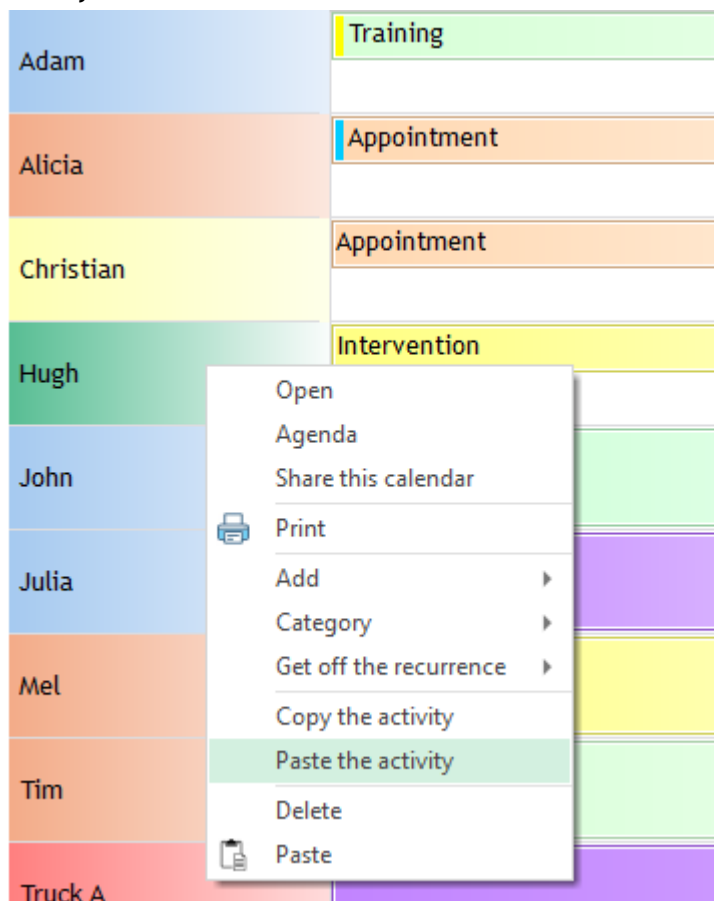
Create the schedule of one of your resources first.

Display the period you need to copy and paste (week, month...)

Place your mouse on the resource, right click and select « Copy the activity »



Place your mouse on the other resource and click on the right button of your mouse and select « Paste the activity ».



Thanks to this function, you will save time avoiding creating similar schedule several times.

Copy/Paste several items via the selection Mode

Via the selection Mode, you can select several events and then copy and paste them.

NB: you can copy and paste only on the time axis: Indeed, the events will be copied to the same resources. Only dates will change.

Assign an event/unavailability to several resources

You can assign an event to several resources at a glance!

Create Multi-resources events

From PlanningPME, create an event on the schedule.

On the « Event » window, choose the tab « Resources » or tick on the box “Several” resources. The following window appears.

Event X

General | Links | Resource |

All Departments ▾

☐ Display only available resources.

☐ Show competent resources only

☐ Display only resources under contract of employment

Search...

| DEPARTMENT | LABEL |
|----------------------|---------------|
| Administration | Adam |
| Commercial, Region A | Alicia |
| IT | Christian |
| Administration | John |
| Administration | Julia |
| Commercial, Region A | Mel |
| Commercial, Region B | Tim |
| Vehicles | Truck A |
| Vehicles | Truck B |
| Vehicles | Vehicle Alpha |
| | To plan |

> >> < <<

| DEPARTMENT | LABEL |
|------------|-------|
| IT | Hugh |

OK Cancel

The single arrow button allows you to select resources one by one

The double arrows button allows you to select all resources of the left window in one click

For a multi-selection, click on the name of the resources + touch CTRL before clicking on the single arrow.

Point 1: Filter resources by department or by type

Event

General | Links | Resource

Commercial

☐ Display only available resources.

☐ Show competent resources only

☐ Display only resources under contract of employment

Search...

| DEPARTMENT | LABEL |
|----------------------|-----------|
| Commercial, Region A | Alicia |
| Commercial, IT | Christian |
| Commercial, Region A | Mel |
| Commercial, Region B | Tim |

> >> < <<

| DEPARTMENT | LABEL |
|----------------|-------|
| Administration | John |

History... OK Cancel

You can then assign the event to one or more resources of this department.

Point 2: Display only available resources

Selecting this box, you will avoid a double-booking. You can only select available resources on the period chosen.

NB: if you have a lot of resources, this option can slow down your system.

Point 3: Display only resources under contract of employment

This is another filter.

So, you can assign event to one or more resources easily.

Separate Multi-resources events

You can divide events assigned to several resources to assign it to one resource independently to the others. To do so, select the event, click right and select "Separate".

| | | | |
|-----------|------------------------|--|--|
| | | | |
| Alicia | Appointment | | |
| Christian | Appointment | | |
| Hugh | Intervention | | |
| John | Installation FMI | | |
| Julia | Repair PPMECH | | |
| Mel | Intervention PPMECA | | |
| Tim | Training | | |

- New task
- New Unavailability
- Open
- Print
- Category ▶
- Status ▶
- Client ▶
- Lock
- Link ...
- ... to
- Copy
- Separate
- n-Split
- Delete
- Paste

Then, you will be able to modify the event for the resource selected.

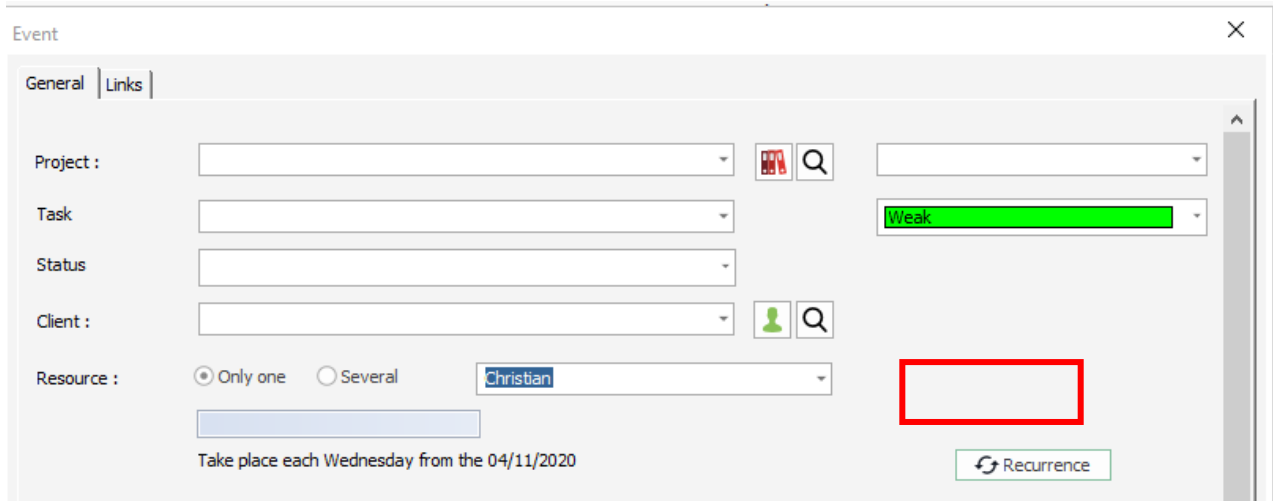
Create periodical events

A periodical event is an event that is repeated on the time at regular intervals.

You can create recurrent events in order to save time. The function “Recurrence” will help you manage monthly meeting, yearly appointments...

Create a periodical event

When creating an event, in the window “Event”, click on the button “Recurrence”.



The screenshot shows the 'Event' window with the 'General' tab selected. The 'Project' field is empty. The 'Task' field is empty. The 'Status' field is empty. The 'Client' field is empty. The 'Resource' field is set to 'Christian' and has a red box around it. Below the 'Resource' field, it says 'Take place each Wednesday from the 04/11/2020'. To the right of the 'Resource' field, there is a 'Recurrence' button with a circular arrow icon.

The following window appears:

Enter the beginning and ending hours for this event or select "All day".

Choose the frequency: Daily, weekly... and days when this event takes place.

Enter the ending date for your event and save.

Recurrence [X]

Timetables

Beginning: _____ Number of days: [up] [down]

End: _____ ☒ All day

Recurrence

☐ Daily All the week(s) on :
☒ Weekly ☐ Monday ☐ Tuesday ☒ Wednesday ☐ Thursday
☐ Monthly ☐ Friday ☐ Saturday ☐ Sunday
☐ Yearly

Range of recurrence

Beginning: [calendar icon] ☒ No end date

☐ End the : [calendar icon]

Visualization on the planning board:



Daily recurrence

Recurrence

☒ Daily ☐ All the day(s)

Weekly recurrence

Recurrence

☐ Daily All the week(s) on :
☒ Weekly ☒ Monday ☐ Tuesday ☐ Wednesday ☐ Thursday
☐ Monthly ☐ Friday ☐ Saturday ☐ Sunday
☐ Yearly

NEW!!! From version 4.1. Monthly recurrence

Recurrence

☐ Daily ☒ The All the Month
☐ Weekly ☐ The All the Month
☒ Monthly
☐ Yearly

You can select either one day in the month or select for instance the second Monday of the month.

Yearly recurrence

Recurrence

☐ Daily ☒ Each 9 April ▼

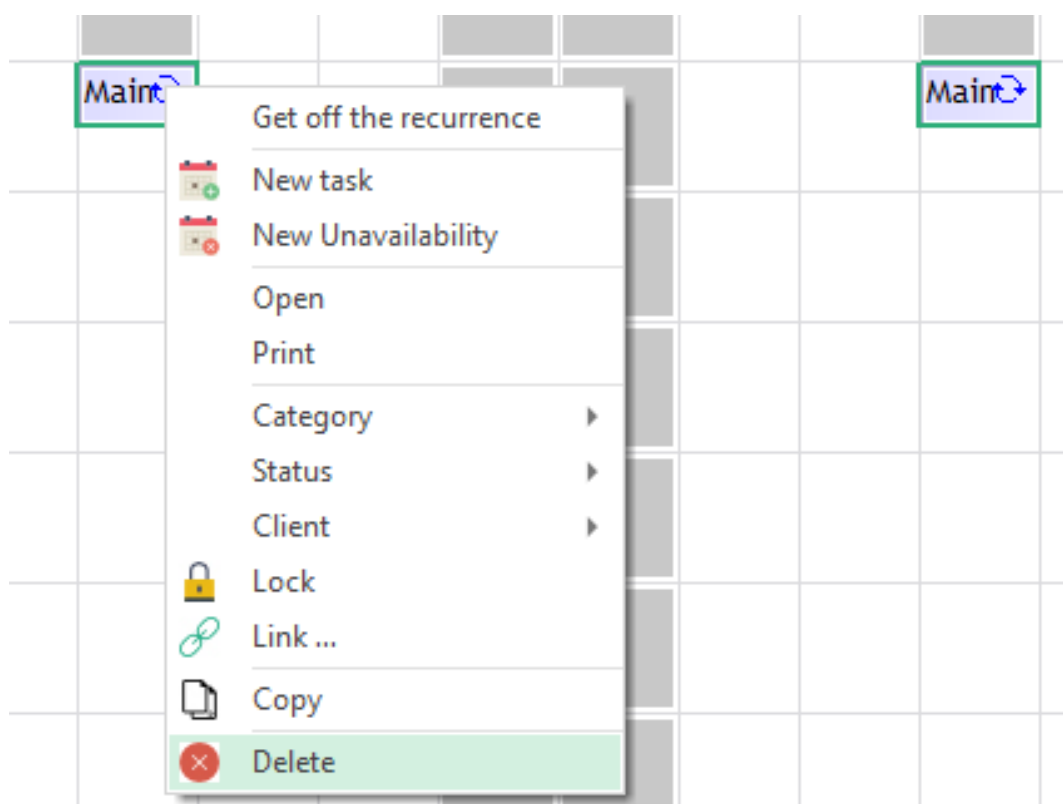
☐ Weekly

☐ Monthly

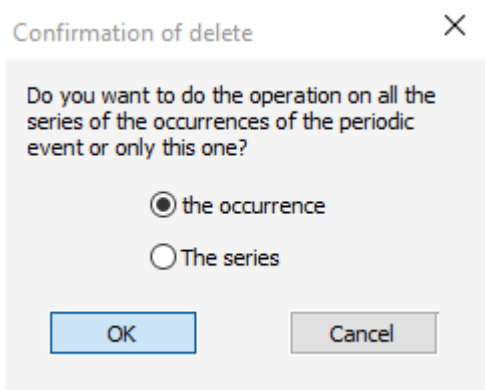
☒ Yearly

Delete an occurrence or delete the series

You can delete an occurrence of a periodical event or delete all the series. To do so, select the event and right click on the mouse.



Then, clicking on « Delete », this message will appear:



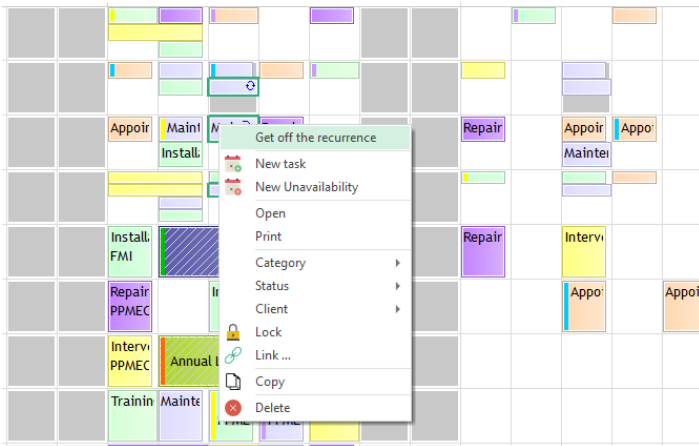
If you want to delete the selected event only, choose « the occurrence ».
If you want to delete all the series, choose « the series ».

Get off the recurrence one or several events

If you want, you can get off an event from its series either to:

- shift it
- activate a reminder only on this event...

-> To get off one event from the recurrence:

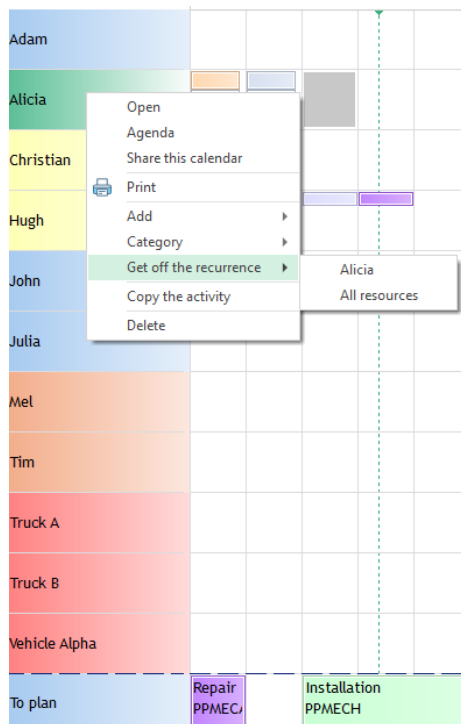


Select "Get off the recurrence".

-> To get off several events from the recurrence:

You can extract several events from the recurrence: It is useful when a person is on holidays.

To do so, click right on the resource and select "Get off the recurrence".



Select the period during which you want to get off the events from the recurrence.

Get off the recurrence ✕

Begin

26/10/2020 ▾

End

26/11/2020 ▾

OK

Cancel

Be careful: The period of time displayed on the screen must include the period during which the resource is off.

Events are then independent and you can reassign them to other resources or delete them.

Modifications of events and unavailabilities

Shift an event or unavailability on the schedule

Via a Drag and Drop

Select the event or unavailabilities and shift it via a drag and drop directly on another resource and/or on another date.

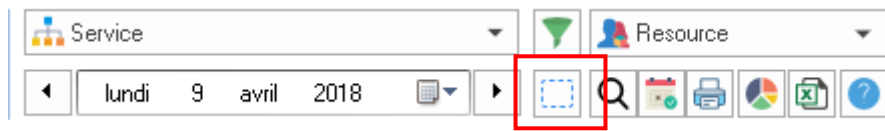
Open the window

You can also open the event or unavailability and change the dates and/or resources directly.

Shift several items via the selection mode

Creation mode This mode allows you to create events on the schedule drawing a rectangle or double clicking.

Selection Mode This mode allows you to select several events at the same time and to move them on the scale time.



While going to the “Selection” Mode, you can shift your events. After your action, the program will go back automatically to the Creation Mode.

You can select several events at the same time drawing a rectangle grouping several events or selecting them one by one with the key CTRL pressed on.

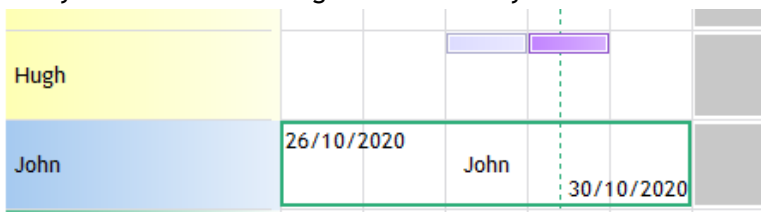
Shift your events along the scale time, dragging one of the selected events.

Careful: You can move your events along the time axis but not along the y-axis.

If you made a mistake, you can cancel the last operation pressing the keys CTRL + Z.

Stretch the box with your mouse directly

Place your mouse at the right side of the box until your cursor become a triangle and change the duration with your mouse stretching the box directly.



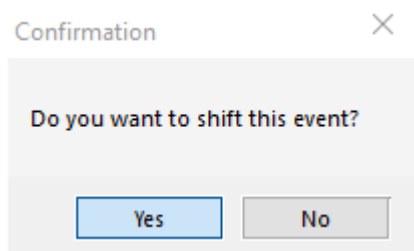
Confirmation message while shifting an event

In order to avoid planning mistakes while shifting a booking on the planning board, a new option was added.

From the menu Tools -> Options -> User, you now have the option “Drag and drop confirmation”.

Then, while moving an event via a Drag and drop with your mouse, you will have this message:

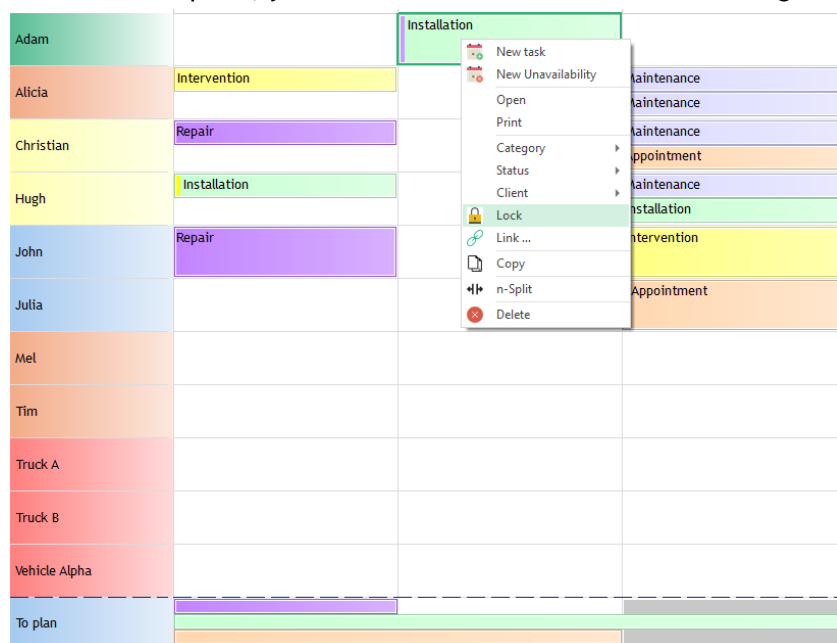
“Are you sure you want to shift this event”?



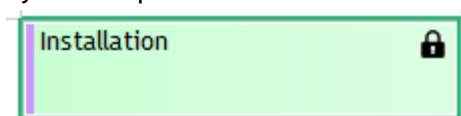
Forbid events modification

Lock your events

You can lock some events in order no one to modify them without your agreement. First of all, to have access to this option, you must enter the schedule with user's rights.





Put your mouse on the schedule and click right on your mouse. Select "Lock". You can visualize the locking by an icon padlock.



Then, double clicking on the locked event, you will see the name of the user who locked the event. Here, Paul



Event

General | Links

Project :  

Task :

Status :


Client :  

Resource : ☐ Only one ☐ Several

Beginning : ☐ All day

End : ☐

Duration : ☐ (H)

 Admin ☐ Reminder :

0 characters

You can visualize the locking by an icon padlock.

Only the person responsible for the locking or the administrator will be authorized to unlock the event selecting “unlock” with a right click.

Forbid creation and modification of events prior to the present day

You first have to activate the option going on -> tools -> options-> event and ticking on the option. Past events to the current date or to the date selected will not be allowed to be modified.

Options

Timetables | Display | Data | Event | Outlook | User | advanced |

Display

☐ Number of resources by default: ☒ Only one ☐ Several

☐ Display a percentage of assignment ☐ Display parameters tab


☐ Display a button Availability ☐ Display invoicing tab

☐ Display a break time ☐ Event reminder using a date

☐ Activate status for tasks ☒ Activate status for unavailabilities

☐ Activate categories

Controls

 ☐ Assign only one event at the same time to one resource

☒ Forbid the creation and the modification of events prior to the present day

☐ Save the history of events modifications

☐ Do not add new labels ☐ Ask for the duration to plan

Planned / Achieved

☐ Display the percentage of achievement ☐ Display the duration achieved

Color when overdue Color when

Notifications

☐ Activate notifications

OK Cancel

You will then have this message:

Information



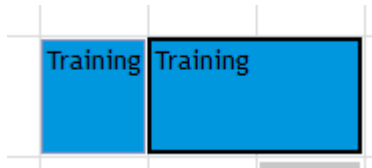
The creation and the modification of events prior to the 29/10/2020 are forbidden

OK

Split an event into 2 events on different durations

Select an event on the planning board.

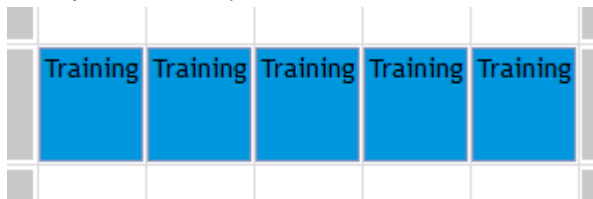
Then, right click and select “Split”. Your event will be split into 2 events.



Burst an event into several 1-day duration events

When you have an event of a duration in days, you can split it with a right click and have several events of one-day duration.

Example: this 5 days duration event was divided into 5 events of 1 day.



You can use this option to put some different comment for each day or to assign the event to a different resource each day.

Undo function

The UNDO function (CTRL + Z or Menu Edit -> Cancel) is working after doing the following actions:

When you create an event or unavailability

-> The events created will be removed.

When you shift an event or unavailability

-> Events shifted will go back to their original place.

When you split or divide an event or unavailability

-> The action will be canceled

When you copy and paste an event or unavailability

-> The action will be canceled

Delete events or unavailabilities

Delete one event/unavailability

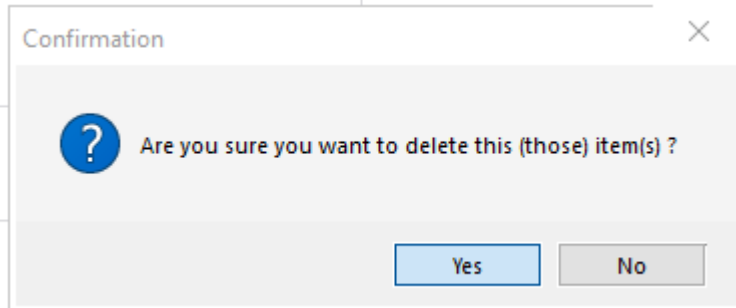
Select an event and right click and then “Delete”.

Or you can press the key “delete” on your keyboard.

Delete several events/unavailabilities

To delete several events, go on a selection mode and select your events.
Then, right click and select “delete” or press the key “delete”.

You will have this confirmation message.



Event duration

Assignment of a duration to the event in hours or days

When you affect a duration to an event, PlanningPME will calculate cleverly the ending date taking into account your resources slots: slots and non-working days. You can also indicate a break.

How to use this feature?



Create an event on your schedule. In the dates, press the double arrow to display the duration option.

Event ✕




General



Task:


Task status:

Client:  

Resource: ☐ Only one ☐ Several

Beginning:   ☒ All day Break 

End: ☒  

Duration: ☐  (D)

0 characters ☐ Reminder :

Careful! An event with a duration can only be assigned to one resource.

NB : Ticking on "All day" you can enter a length in days.
Ticking off "All day" you can enter a length in hours.

Slots button within the event window

You can register up to 4 slots button within the event window in order to save time:

Event

General

Task

Task status

Client :

Resource : ☒ Only one ☐ Several

Beginning : 12/11/2020 09:00 ☒ All day Break 00:00


End : ☒ 12/11/2020 18:00

Duration ☐ 1.00 (D)

When pressing one of the button, the hours defined for this slot will be automatically assigned.
To define the slots buttons, go to the menu « Tools » -> « Options » -> "Timetable"


Timetables | Display | Data | Event | Outlook | User | advanced |

Working week

 ☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday


First day of the week: Monday


Timetables

 Beginning: 08:00 End: 18:00 Morning: 09:00 - 12:30

Hours per day: 07:00 Afternoon: 13:30 - 18:00

Beginning of night hours: 21:00 End of night hours: 05:00

☒ Slot 1: Morning 09:00 - 12:30 

☒ Slot 2: Afternoon 13:30 - 18:00 

☐ Slot 3

☐ Slot 4

Time zone: (UTC+01:00) Central Europe Standard Time

OK Cancel

You can create up to 4 slots ticking on the boxes « Slots » and giving them a name.

Example:

- Slot 1: Morning; 9h – 12h30
- Slot 2: Afternoon: 13h30 – 18h00

Tip: You can have the colours of the events displayed in function of the colour given for each slot selecting “Timetables” from the menu Tools -> Options -> View.

Options

Timetables | Display | Data | Event | Outlook | User | advanced |

Preferences of the planning

Font : Trebuchet MS 10

Brand: logo.bmp

Maximum height of one line : 60 ☐ Adjust the height of the line automatically

Number of visible lines 15 ☐ Event not proportional to hours

☐ Adapt hours in the schedule depending on the events hours

☐ Activate refresh button

Colors

Color depending on: ☐ Task ☐ Category ☒ Timetables ☐ Project

This option is useful while managing up to 4 different rotating shifts.

Define a break while creating an event

To activate this option, go to the menu Tools -> Options -> Event -> View and select the box "Display a break time".

Event

General | Division |

Task: Intervention

Task status:

Client:

Resource : ☒ Only one ☐ Several Adam

Beginning : 17/11/2020

End : 20/11/2020

Duration : 81.0 (H) 11.571 day(s)

Break : 00:00

Recurrence

Reminder :

You can indicate a break in hours. This time will be taken into account on the hours calculation.
Careful: Events with a duration in days can have a break in hours assigned! It will not be counted.

Events options

PlanningPME is a software entirely customizable. It has initially a simple aspect and can become more furnished depending on the options activated from the menu

Tools -> Options -> Event

We will describe on this document all the options you can activate from this window:

Options

Timetables | Display | Data | Event | Outlook | User | advanced

Display

Number of resources by default: ☒ Only one ☐ Several

☐ Display a percentage of assignment ☐ Display parameters tab

☐ Display a button Availability ☐ Display invoicing tab

☒ Display a break time ☐ Event reminder using a date

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☒ Save the history of events modifications

☐ Do not add new labels ☐ Ask for the duration to plan

Planned / Achieved

☐ Display the percentage of achievement ☐ Display the duration achieved

Color when overdue Color when

Notifications

☐ Activate notifications

OK Cancel

Number of resources by default

Resource : ☒ Only one ☐ Several

Choose if you prefer one or several resources for each event by default.

If you choose « Several », the tab « resources » will appear by default in the « Event » window.

Event ✕

General Resource

All Services

☐ Display only available resources.
 ☐ Show competent resources only
 ☐ Display only resources under contract of employment

Search...

| DEPARTMENT | LABEL |
|------------|-----------------|
| Technical | John |
| Commercial | Julia |
| Commercial | Mel |
| Technical | Christian |
| Technical | Hugh |
| | Vehicle - Chevy |
| | Truck A |
| | Truck B |

>

>>

<

<<

| DEPARTMENT | LABEL |
|------------|--------|
| Commercial | Alicia |
| Technical | Adam |
| Commercial | Tim |

OK Cancel

You can, of course, decide to assign an event to only one person even if you chose the option « Several » and vice versa.

By default, we advise you to let this option to “Only one”.



Display a percentage of assignment

Ticking on this option, a scrolling menu will appear on the event window:

Event X

General

Task: 100 %

Client:  

Resource: ☐ Only one ☐ Several

Beginning: ☒ All day

End: ☒ 18/11/2020

Duration: ☐ 1.00 (D)

0 characters ☐ Reminder:

What is useful for?

While assigning an event, if you do not want to decide which moment of the day your resource will do this event, you can assign a percentage for this event!

Example: You would like to assign a half day appointment (4h) to your resource without deciding the real hours:

On the schedule, the event will appear on the entire day. But, the real time counted is 50% of the day: 4h.

Display a button « Availability »



Activating this option, a new icon appears on the event window.

You can find available resources for this event directly from here:

Search availability

From : mardi 3 novembre 2020 08:00:00

Up to : mardi 3 novembre 2020 15:05:00

Task : Skills

Length: 1 Hours Days

Resource Filter : All Services

☐ Under contract of employment

Find Clear

| BEGINNING | END | RESOURCE | CITY | COUNTRY |
|-----------------------------|-----|----------|------|---------|
| There are no items to show. | | | | |

Select your criteria, launch the search, visualize your resources availabilities and select the resource to assign

Event reminder using a date

Selecting this option, you can now use a date as a reminder.

Then, when creating an event, we can specify a date and time for the reminder.

Event

General

Task : Maintenance 100 %

Client : Client1

Resource : Only one Several Alicia

Beginning : 16/11/2020 08:00 All day

End : 17/11/2020 12:00 Morning Afternoon

Duration : 28.0 (H) 4.000 day(s)

0 characters 08:00 16/11/2020 ☒ Reminder :

Recurrence

History... OK Cancel

Display parameters tab in the event

➔ Intervention place and event division

When you create an event which takes place to the client's address, tick on the ^{first} box. If you tick off this box and click the button « apply », a new tab « Place » will appear. You can then indicate the place of your appointment.

Event

GeneralParameters

☒ Client's address

☐ The event is divided

Event

GeneralParametersPlace

Address :

Floor:

Door code:

Zip code:

City:

From this tab « Parameters », you can also decide to split the event ticking on the box « The event is divided » then « Apply ». The Tab « Division » appears on your event window. Click on “Add” to enter the beginning and ending dates of your divisions.

Event

GeneralParametersPlaceDivision

BeginningEndLabel

Supprimer le fractionnement ...

Ajouter


Modifier

Supprimer

History...

OK

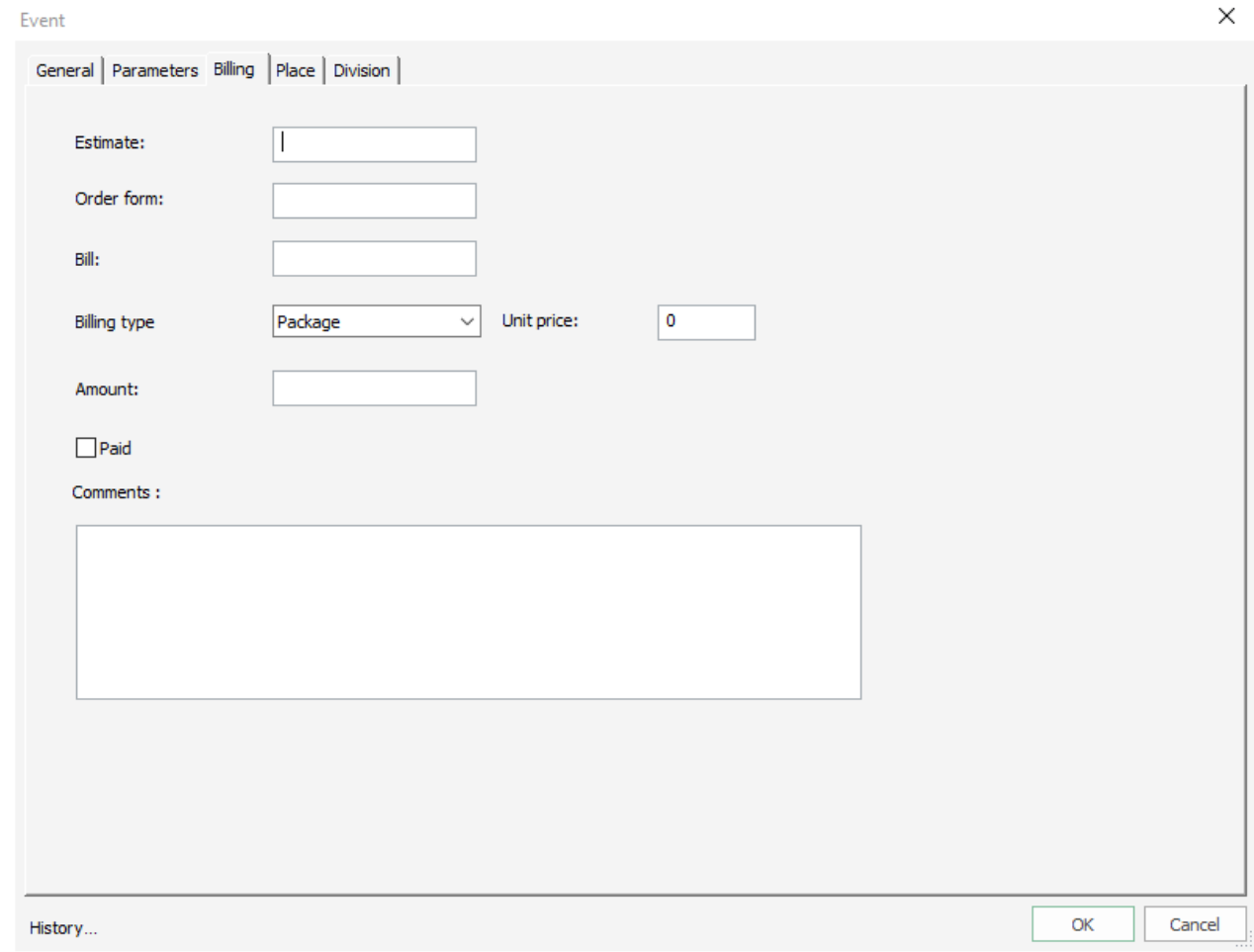
Cancel

NB: You can also split your event via the icon " N Split" symbolized by this icon:  at the top left side of your screen. A cursor then appears and you can split your event on the schedule selecting the event and cutting it with your mouse.

Display invoicing tab in the event

→ Tab "Billing"

When you create an event, a tab « Billing » will appear on the event window:



The screenshot shows a software window titled "Event" with a close button (X) in the top right corner. The window has a tabbed interface with five tabs: "General", "Parameters", "Billing" (which is currently selected), "Place", and "Division". The "Billing" tab contains the following fields and controls:

- Estimate:** A text input field.
- Order form:** A text input field.
- Bill:** A text input field.
- Billing type:** A dropdown menu currently set to "Package".
- Unit price:** A text input field containing the value "0".
- Amount:** A text input field.
- Paid:** A checkbox that is currently unchecked.
- Comments :** A large text area for entering comments.

At the bottom of the window, there is a "History ..." button on the left and "OK" and "Cancel" buttons on the right.

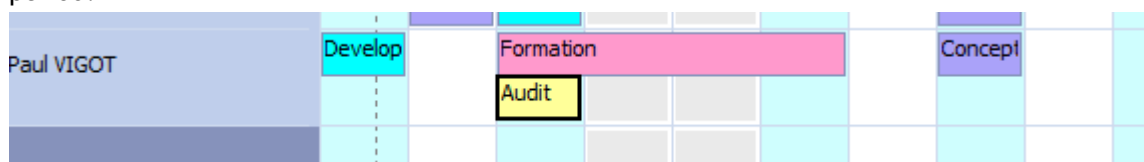
If you select the type of billing "Unit", the amount will be automatically calculated in function of the event duration.

If you select the type of billing "Package", you can enter directly the total amount.

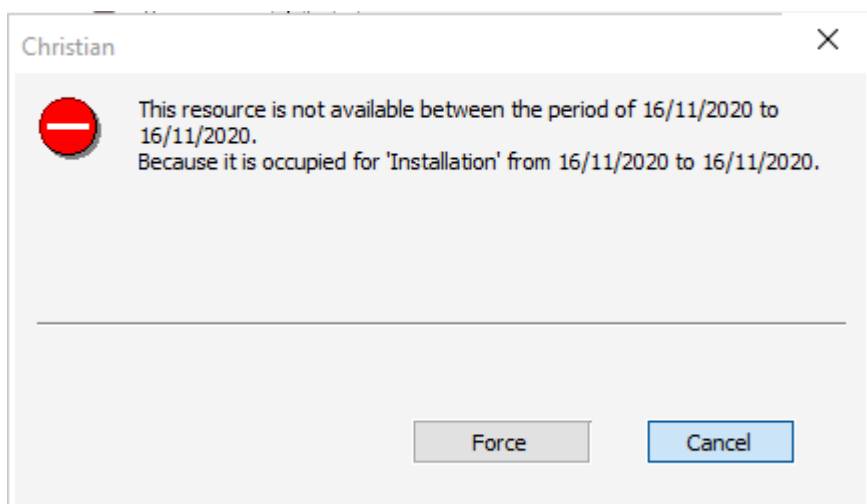
You can then know the total amount by resource or by client with the statistics For more information, please see chapter on the statistics.

Assign only one event at the same time to a resource

If you do not select this option, you will be able to allocate several events to a resource at the same time period:

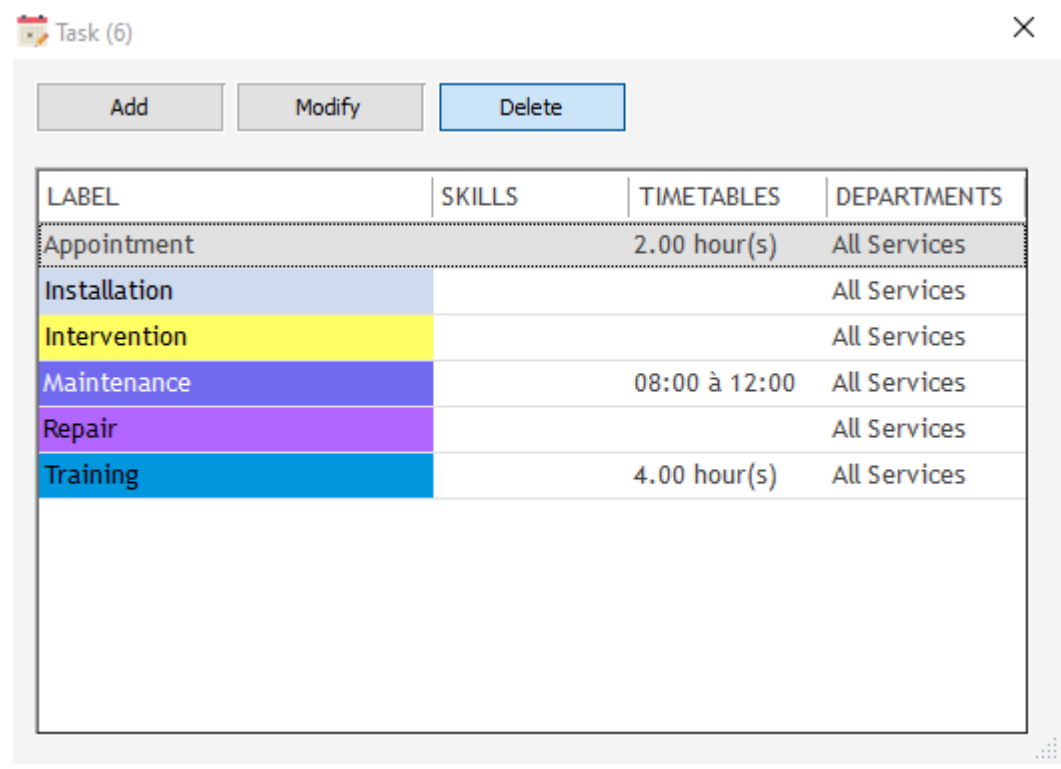


NB: If ever you select this option, you will also be able to create several events (if you have the permissions) but you will have this warning message each time asking you if you want to force the assignment or not:



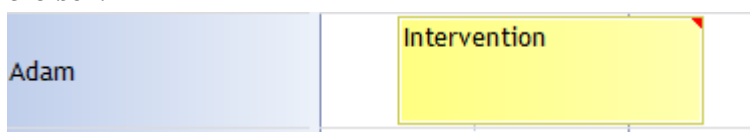
Do not add new labels

If you select this option, all the new labels that you type while creating an event on the planning board will not be added on the list of your events in the menu Data -> Events.

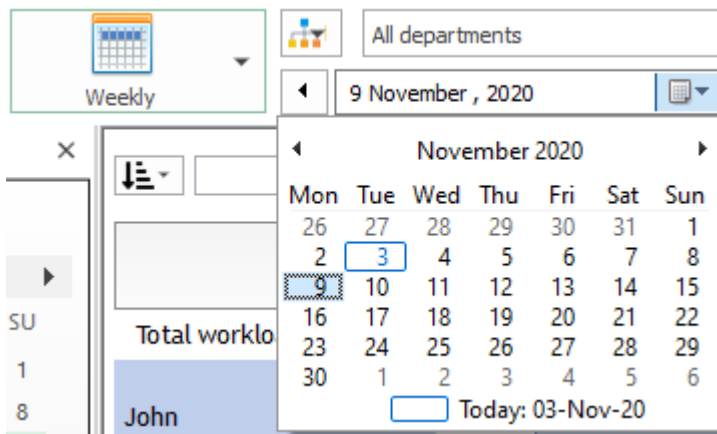


Visualise rapidly events with comments

You can know rapidly which events have a comment thanks to the red triangle on the right top corner of the box.



Date choice



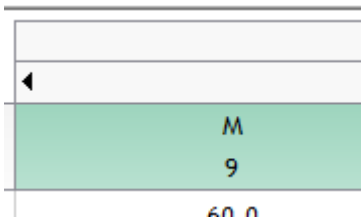
Choose the day you want your schedule to start from.

Clicking on the month or the year, go directly to the month or the year wanted.

Go from one week to another via shortcuts keys

Pressing the button (+) and (-) of your lapboard, you can go from a week to another directly. Those shortcuts are the equivalent of a horizontal scrolling bar.

Change the date from the arrows

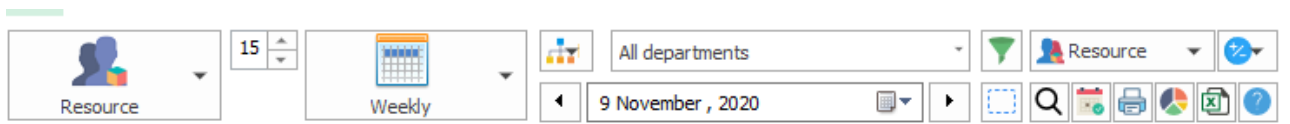


You can go from one week to the other from those arrows.

Change the views

Change the view: Resource, Task, Client, Project, Agenda, List

- Change the time scale and dates
- Filter events on the planning board from different criteria
- Display items In Use/Available on a defined view
- Create customized filters



Views available

You have many views available: Event, Client, Project, Map, Agenda, List views.

- Resource View

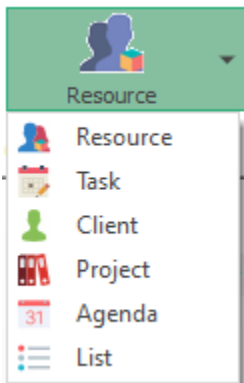
- Event View
- Client View
- Project View
- Agenda View
- List View

You can make your planning from all those different views.

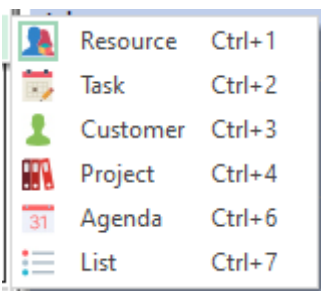
Ways to change the view

Different ways to change the view:

From the drop down filter:



From the menu View -> View



From the keys shortcuts

Resource view: CTRL + 1

Task view: CTRL + 2

Client view: CTRL + 3

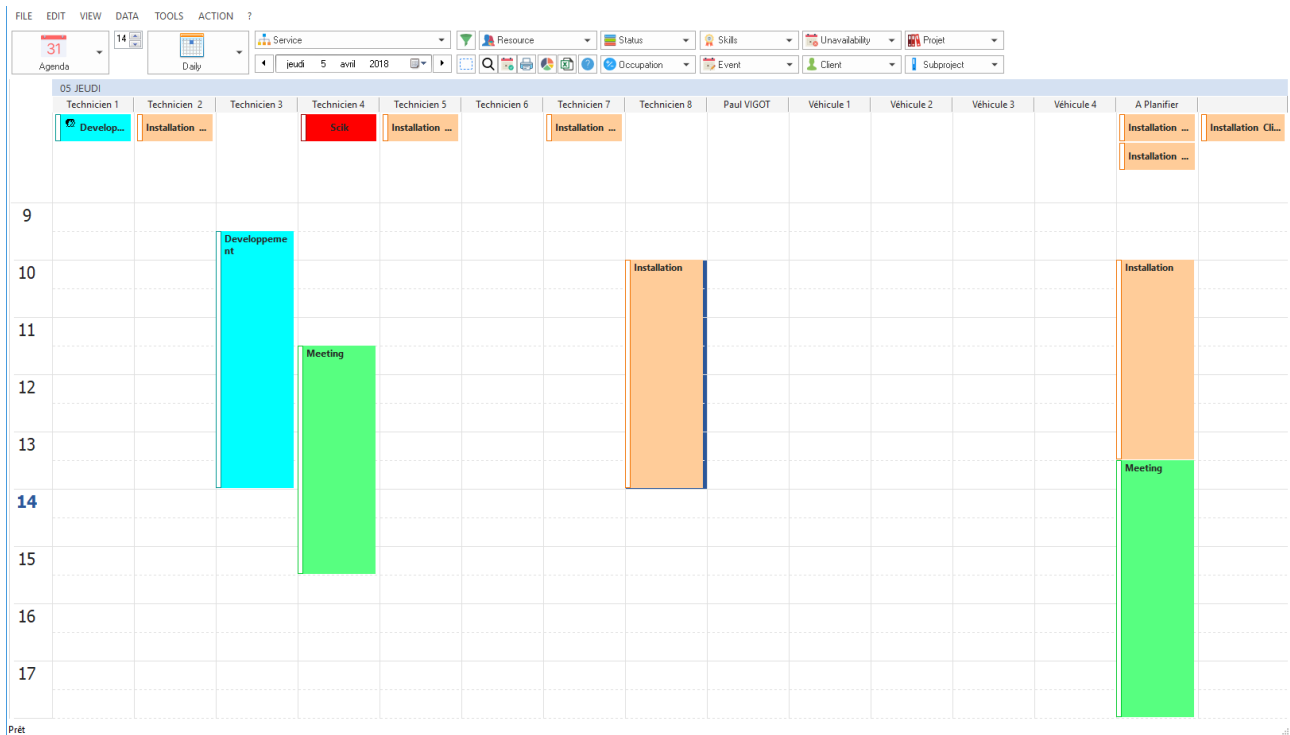
Project view: CTRL + 4

Agenda view: CTRL + 6

List view: CTRL + 7

Agenda View

In addition to the already existing views (resources, tasks, clients, projects, map), Target Skills now has developed the “Agenda View”.



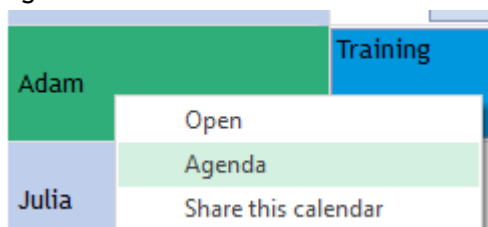
Display the agenda View

From the drop-down list

You just need to select it from the drop-down list or the shortcut CTRL + 6.

From the resource view

Right click on one of the resource and select “Agenda”

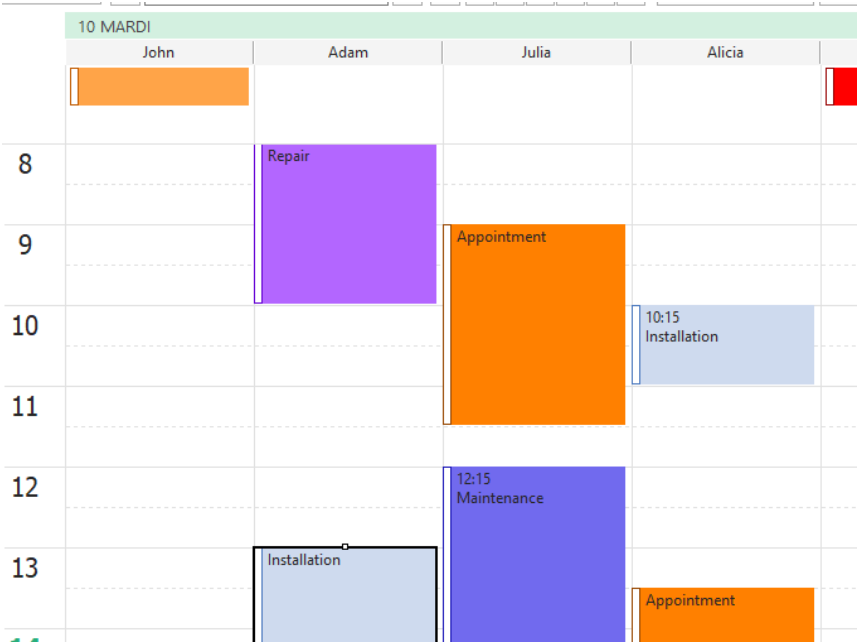


Then, the agenda of the resource selected will be displayed:

Types of view

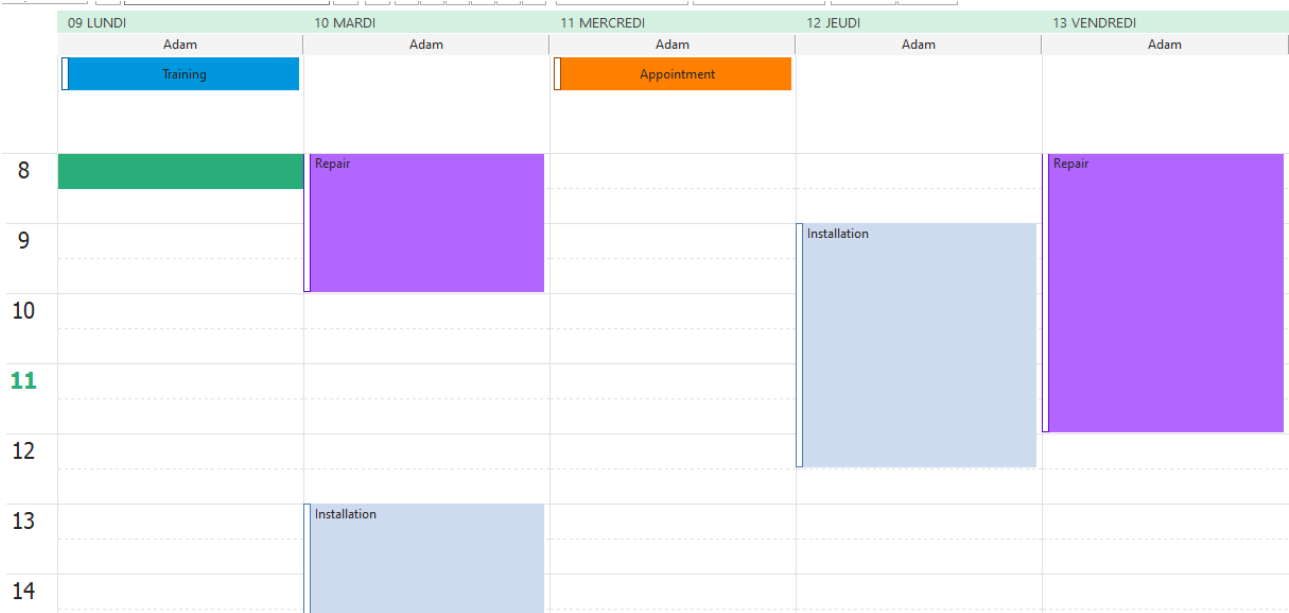
On the Agenda View, you have the choice between three types of view: daily, weekly and monthly.

Daily View

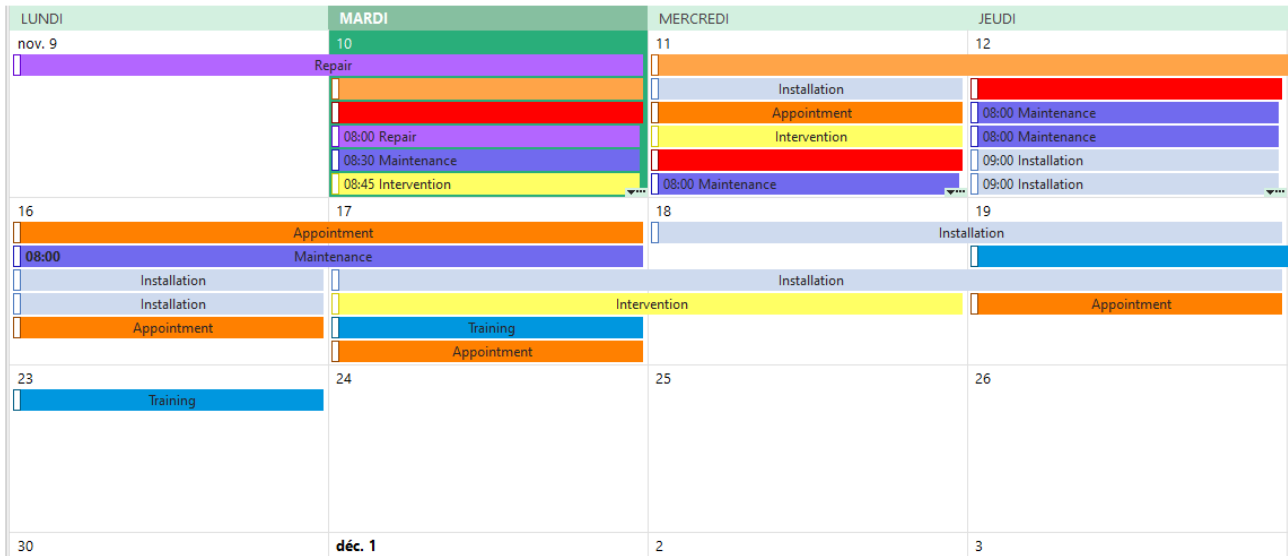


You can make a selection of the resources you want to display with the “resources” filter.

Weekly view




Monthly view



Settings of the view

From the menu Tools -> Options -> Display you can select different parameters:

Agenda

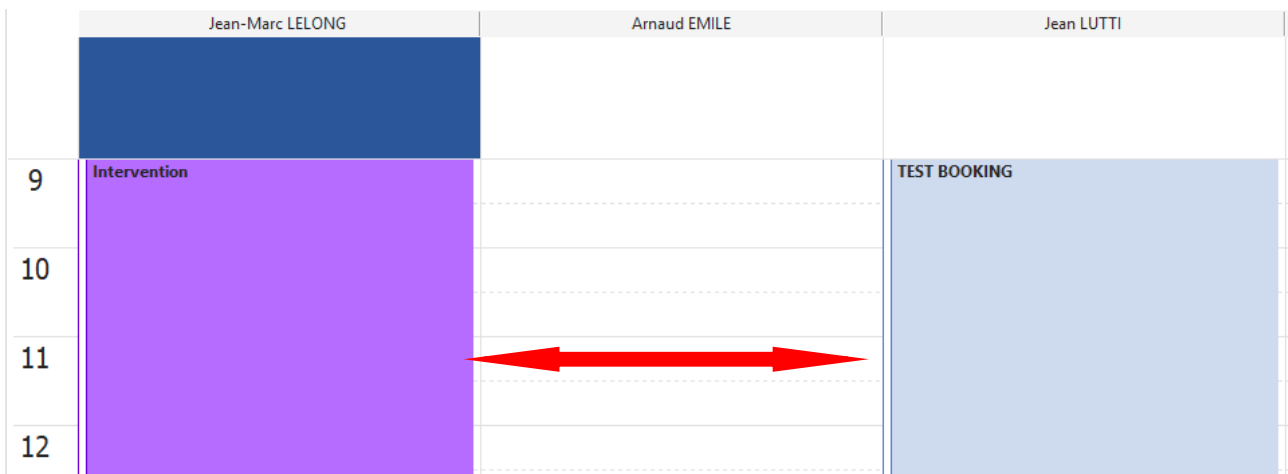
 Width of the columns in pixels: 150

Time scale: 30 minutes

☐ See minutes on the time scale

Column width

Select the size of the resource column:



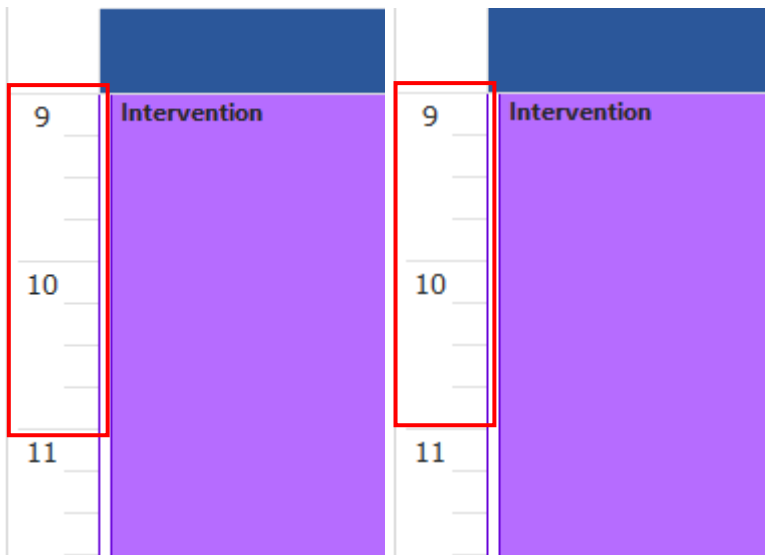
Time Scale

Select the precision of the display:

Time scale: 30 minutes

☐ See minutes on the time scale

5 minutes
10 minutes
15 minutes
30 minutes
60 minutes



See minutes on the time scale

Select whether you want to see the minutes displayed or not.

List View

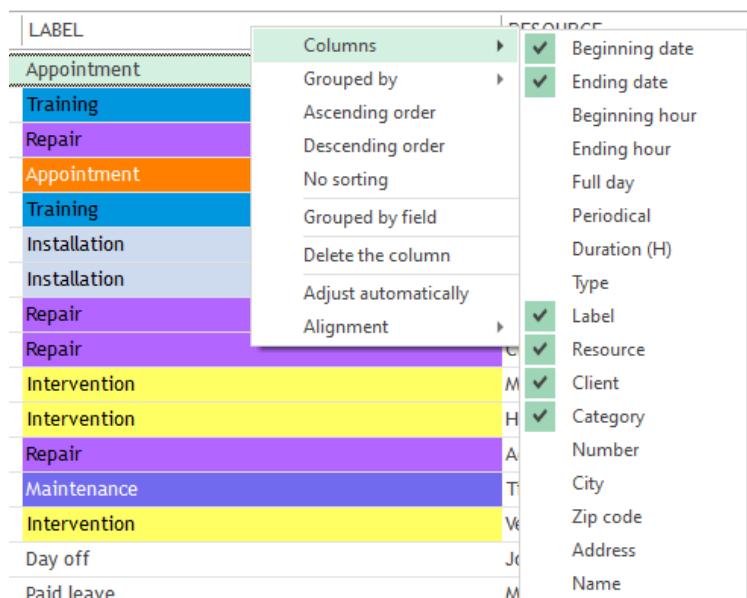
In addition to the already existing views (resources, tasks, clients, projects), Target Skills now has developed the “List View”.

Drag a column header here to group by that column.

| BEGINNING DATE | ENDING DATE | LABEL | RESOURCE |
|----------------|-------------|--------------|-----------------|
| 09/11/2020 | 09/11/2020 | Appointment | Christian |
| 09/11/2020 | 09/11/2020 | Training | Adam |
| 09/11/2020 | 10/11/2020 | Repair | Truck A |
| 09/11/2020 | 09/11/2020 | Appointment | Alicia |
| 09/11/2020 | 09/11/2020 | Training | Tim |
| 09/11/2020 | 09/11/2020 | Installation | John |
| 09/11/2020 | 09/11/2020 | Installation | Vehicle - Chevy |
| 09/11/2020 | 09/11/2020 | Repair | Julia |
| 09/11/2020 | 09/11/2020 | Repair | Christian |
| 09/11/2020 | 09/11/2020 | Intervention | Mel |
| 09/11/2020 | 09/11/2020 | Intervention | Hugh |
| 10/11/2020 | 10/11/2020 | Repair | Adam |
| 10/11/2020 | 10/11/2020 | Maintenance | Tim |
| 10/11/2020 | 10/11/2020 | Intervention | Vehicle - Chevy |
| 10/11/2020 | 10/11/2020 | Day off | John |
| 10/11/2020 | 10/11/2020 | Paid leave | Mel |

Columns available

This list contains columns that you can customize in order to classify, display or not, filter.
Here is the list of fields available:



Display Additional fields in the List View

You can also select extra fields on the list view. You need to select the fields you want to add on the list first from the menu View -> Description -> List and indicator

Selection, Ordering and grouping of the columns

Columns selection

You can hide columns that you do not want to display clicking right on the top of the column and then select « Delete the column » or you can tick them on or off from the menu « Column ».

Ascending or descending order

Click on the top of the column directly to make the order or right click and select « Ascending order » or « descending order »:

Columns ordering

Select the column and with your mouse, shift it.

Filters

You can also display the events list in function of a filter. To do so, select the column and shift it to the box as shown below :

You can also right click at the top of the column and select « Grouped by field »

You will then have the events filtered this way:

| Resource ▲ | | |
|------------------|-------------|--------------|
| BEGINNING DATE | ENDING DATE | LABEL |
| ▲ RESOURCE: ADAM | | |
| 09/11/2020 | 09/11/2020 | Training |
| 10/11/2020 | 10/11/2020 | Repair |
| 10/11/2020 | 10/11/2020 | Installation |
| 11/11/2020 | 11/11/2020 | Appointment |
| 12/11/2020 | 12/11/2020 | Installation |
| 13/11/2020 | 13/11/2020 | Repair |
| 17/11/2020 | 18/11/2020 | Intervention |

Consult, modify and delete events

Double click on the event or right click and select « Open » :

You can then modify this appointment.

You can also delete one or several events with a right click and then « Delete ».

Consult, modify and delete events

Double click on the event or right click and select « Open ».

Copy events or Export to Excel

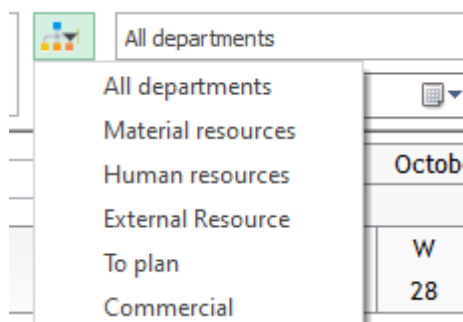
After making your selection, you can copy your events or export them directly to Excel with a right click.

Filters

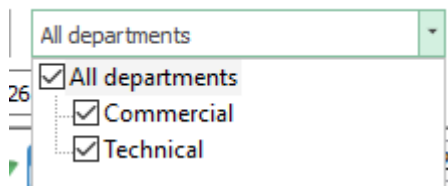
Drop Down filters

Filter the resources by department

Once your departments created from the menu Data -> Department, you can then filter the planning to display resources of one specific department.

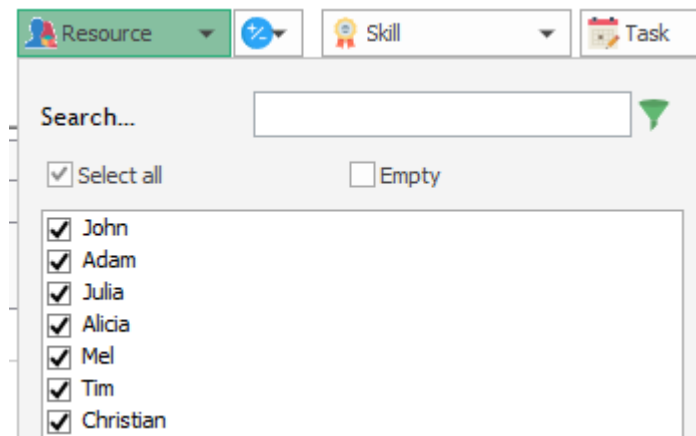


To display several departments, you can use this second filter :



NB: you can add some permissions in order to give restrictions on the access to the different departments. See chapter on the user rights.

Filter the resources by name



We now have a new filter in order to filter more precisely.

This filter is adapted to the department selected: only resources from the department selected will be listed.

Filter by category

Only events of the category selected will be displayed on the planning board on all the different views.

Filter by skill

You can extract resources having specific skills from the schedule. This filter is working only on the “resource” view.

Filter by task label

Only tasks with this label will be displayed on the planning board.

Filter by unavailability

Only unavailabilities with this label will be displayed on the planning board.

Filter by client

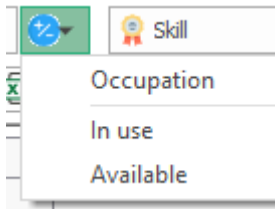
You can display all the events of one or more clients on your screen.

Filter by project

You can display events assigned to a project as previously for clients or events.

Function In Use / Available

You can display objects in use (CTRL + U) or Available (CTRL + A) on the planning board.



Filters ergonomics improved: Option to filter the lines

Option to activate from the menu Tools -> Options -> User -> Filter the line

When using the filters in PlanningPME, once you make your selection, not only events will be filtered but also the lines.

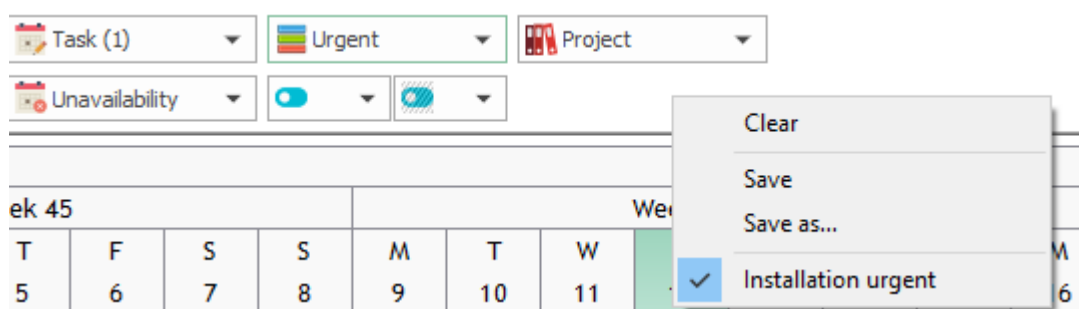
So, depending on the way you are working, you can adapt the filters behavior to optimize your planning. Customise your filters

Creation of personal filters combination

You can create a filters combination in order to save time.

On the planning board, make your selection.

Then, right click on the top bar here and select "Save as". Give a name to your filters combination.



So, selecting the views you just saved, you can filter the planning with your own choices. In just some clicks, combine different filters easily.

NB: Each user has access to his own filters and do not see the filters of the other users.

Filters on additional fields

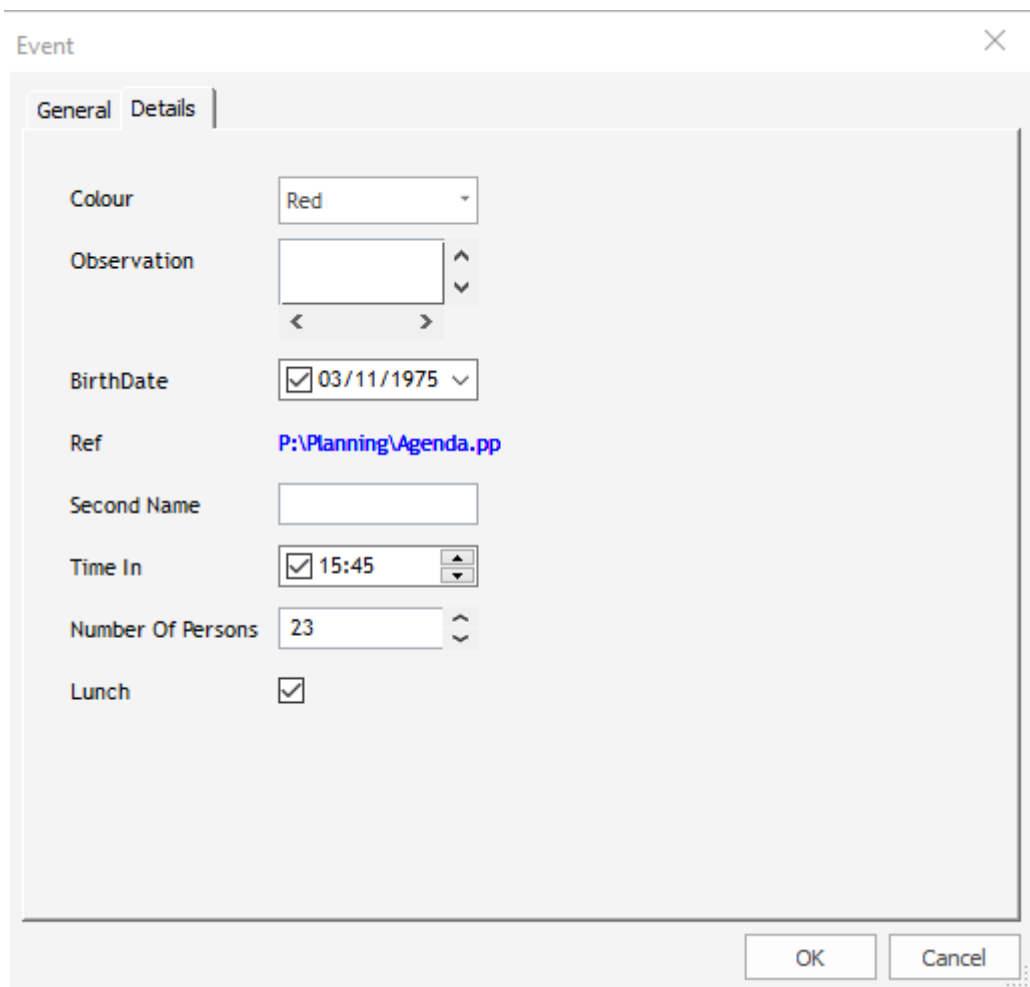
Read next Chapter on the creation of specific data to know more.

Customise your schedule with your own specific data, Menu Data -> Customised fields

The creation of additional fields allows the customization of PlanningPME adding data specific to your activity. You can add new specific data on the following windows:

- Task
- Client (Possibility to associate a list of equipments)
- Human resource
- Material resource

Illustration of this concept: below you have a new tab created with some additional customized data.



The screenshot shows a window titled "Event" with a close button (X) in the top right corner. Inside the window, there are two tabs: "General" and "Details". The "General" tab is selected. The form contains the following fields:

- Colour:** A dropdown menu with "Red" selected.
- Observation:** A text input field with up and down arrow buttons on the right.
- BirthDate:** A checkbox followed by a date field showing "03/11/1975" and a dropdown arrow.
- Ref:** A text field containing the path "P:\Planning\Agenda.pp" in blue.
- Second Name:** A text input field.
- Time In:** A checkbox followed by a time field showing "15:45" and up/down arrow buttons.
- Number Of Persons:** A text input field with "23" and up/down arrow buttons.
- Lunch:** A checkbox that is checked.

At the bottom right of the window are "OK" and "Cancel" buttons.

Aim of the additional fields' creation: Customize the schedule, display those fields on the schedule, in your reports and have statistics. The fields you are going to create can be of several types.

Overview of the different types of fields available

Field ✕

Definition

Name :

Type :

Length:

Label :

Default:

Values:

▼

Choice

Comment

Date

Decimal number

Electronic signature

Geolocation

Hour

Hyperlink

Link to file

Number

Resource

Separator

Signature

Text

Yes/No

Display

Destination

Column :

Width :

Height

Task - Tab 1

▼

1

▲

▼

100

▲

▼

21

▲

▼

OK

Cancel

Text

You can type information on one line:

Second Name

Comment

You will then have a box that you can fill in.

Observation

Choice

Field



Definition

Name :

Type : ☐ Filter ☐ Type

Length:

Label :

Default:

☐ Mandatory ☐ To type

☐ Visible on the mobile version

Values: ☐ Sort A-Z

Display

Destination:

Column :

Width :

Height:

You will then have a drop-down list.



For this type, you must insert values (Start a new line between each value) in order to have a scrolling menu in the tab we are creating.

Date


You will then have a date that you can select as the birth date of your human resources for example.

Birth Date

Hour

You can specify a time:

Time In

☒ 15:25  

Number

You can type a full number:

Number of persons

Number of persons

Decimal Number

You can type a decimal number:

Quantity

Yes/No

You can then tick on the field:

Lunch

☒

Separator

It allows you to separate and order your additional fields with a line break.

Link to file

For this type, you have the possibility to create a hyperlink to open a file from the software directly.

Ref

[P:\Planning\Agenda.pp](#)



NEW!!! File

This additional field is available only on SQL Server and MySQL.

The file will be uploaded directly within the database of PlanningPME and anyone will be able to open the file wherever he is.

Select the file from the points and then, open it with the arrow.

file 2

Geolocation

This additional field is linked to the mobile version of PlanningPME. Indeed, it will be possible to geolocate your employee when he performs a job. The data on his location will then be displayed here once your employee check in or out.

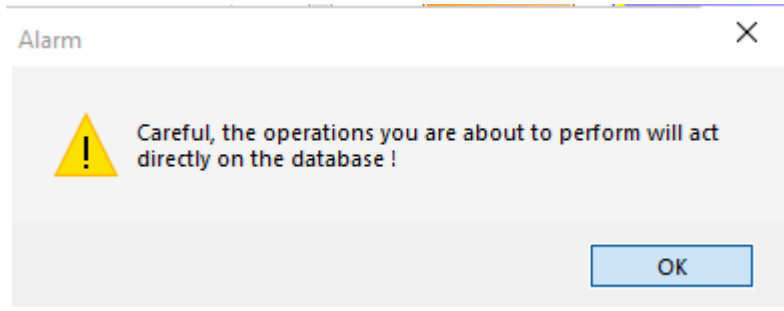
Type Signature

This additional is also linked to the mobile version of PlanningPME. Indeed, you can have a signature of your client from the mobile version and you will see it here as an attachment.

Create additional fields

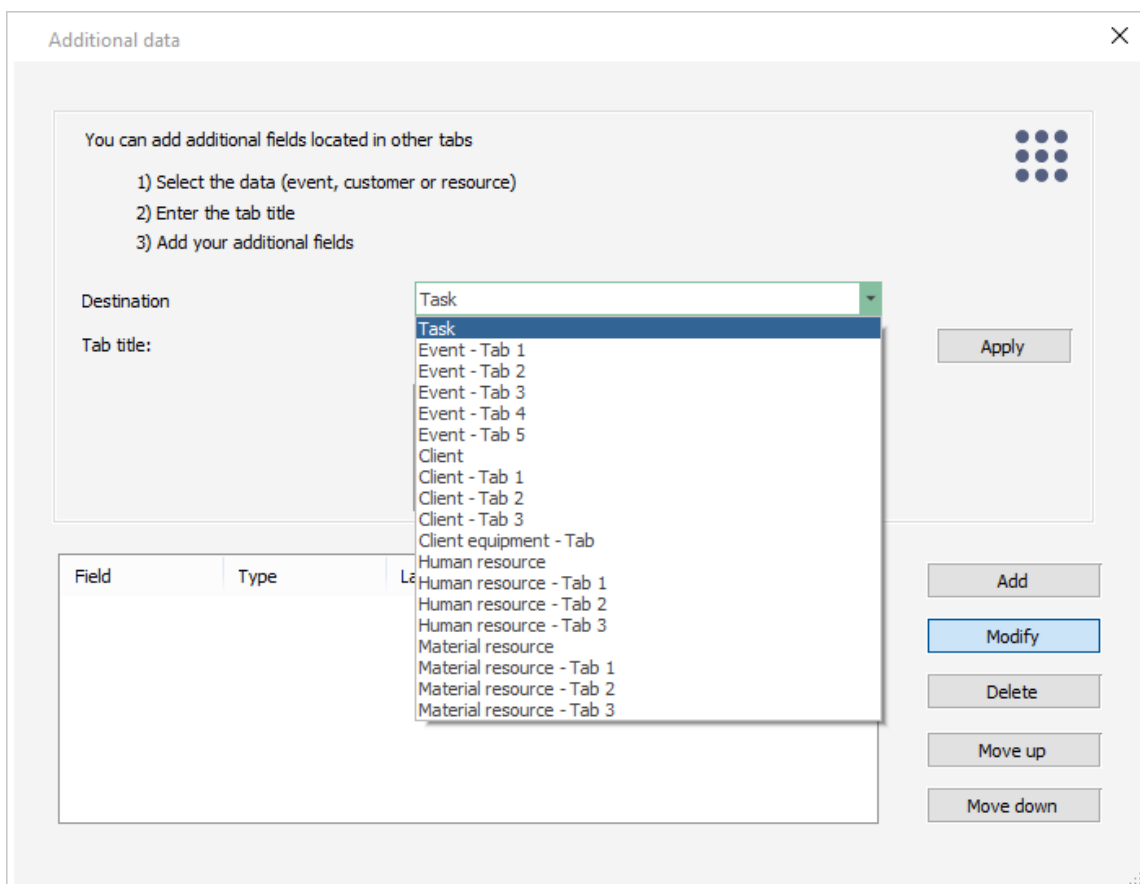
From PlanningPME, go to the menu "Data" -> "Additional fields »:

This warning message appear. Press "OK" and begin the set up.



Select in which window to have your new fields

You can choose in which window you want to add some information: on the event, resource, client projects, client equipment, Human resource and/or Material resource window.



NB : Do not use any punctuation sign (accent, points...)

Enter the Tab Title

Additional data ✕

You can add additional fields located in other tabs

- 1) Select the data (event, customer or resource)
- 2) Enter the tab title
- 3) Add your additional fields

Destination: Event - Tab 1

Tab title: Details Apply

If you want to add a new tab, type the name of your new tab first and you will see it here:

Event

General Details

BirthDate: 03/11/2020

Colour:

Observation:

Create your new fields within this tab

Field ✕

Definition

Name:

Type:

Length: 50

Label:

Default:

☐ Mandatory ☐ To type

☐ Visible on the mobile version

Values:

Display

Destination: Task - Tab 1

Column: 1

Width: 100

Height: 21

OK Cancel

Settings available when you create a new field

Column, Length, Width, Height

You can specify those information while creating additional field:

The image shows two overlapping windows from the Tutorial PlanningPME Desktop version. The 'Event' window is in the background, displaying a form with fields like BirthDate, Colour, Ref, Second Name, Time In, Number Of Persons, Quality, Lunch, and Text. The 'Field' window is in the foreground, showing configuration options for a new field. The 'Field' window has two tabs: 'Definition' and 'Display'. The 'Definition' tab is active, showing fields for Name, Type, Length (set to 50), Label, Default, Mandatory, To type, and Visible on the mobile version. The 'Display' tab shows Destination (Task - Tab 1), Column (set to 1), Width (set to 100), and Height (set to 21). Red arrows and boxes highlight the 'Width' and 'Height' settings in the 'Field' window and the 'Column 1' and 'Column 2' settings in the 'Event' window.

Length: This one is a more technical field: this is the length of the path within the database. Do not change it unless you are familiar with this data.

Creation on the main window: dimensions X, Y to specify

You can create additional fields on the main window of the event, client and resources. For that you will need to precise the location of your new field on the screen specifying the dimension

Field

Definition

Name :

Type :

Length:

Label :

Default:

☐ Mandatory ☐ To type

☐ Visible on the mobile version

Values:

Display

Destination:

Column :

Width : X :

Height: Y :

Event

General | Details

Client :

Resource : ☐ Only one ☐ Several

Beginning : ☐ All day

End : ☐ 10/11/2020

Duration : ☐ 2.5

0 characters

Mandatory field

-> Mandatory standard fields

It is now possible to put some standard fields as the event label or the project name as mandatory.

Group

General | Resource | Client | Options | Event | Unavailability | Project

Tabs access

☒ General

☒ Billing

☒ Parameters

☒ Place

☒ Link

Access to fields

☒ General Tab

☒ Tab1

☒ Tab2

☒ Tab3

☒ Tab4

☒ Tab5

Description

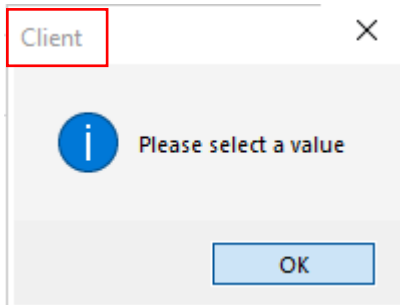
☒ Public

Periodical Event

☒ Delete the serie

| General Tab | Visible | Accessible | Mandatory |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Sous-Projet | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Percentage | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Category | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Beginning date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Beginning hour | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Ending date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Ending hour | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| All day | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Slots | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Recurrence | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Duration | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Break | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Reminder | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Comments | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Equipment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Achievement | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Achieved | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |

Then, while creating a new event on the planning, if one of the mandatory field is not filled in, you will have a message asking you to fill this field otherwise the event will not be created.

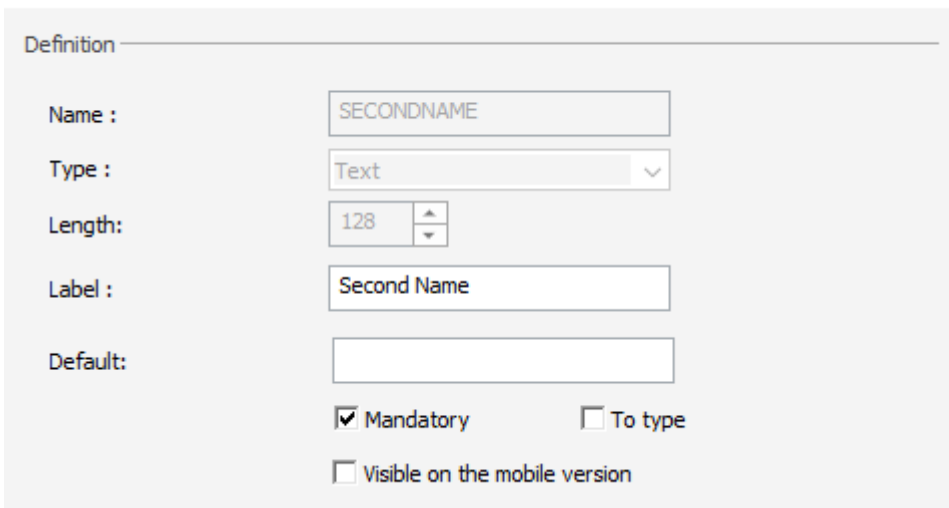


As you can see here, the client must be filled in.

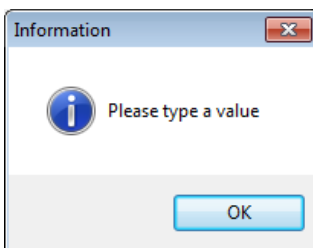
-> Mandatory additional fields

When creating a new field, you can select the option “Mandatory”:

Field



Then, on the planning, if you do not fill this information, you will have this message:



So, you can force the users to fill some specific data.

Visible on the mobile version

You can select which additional fields you want your employees connecting via the mobile version to see or not on the planning board.

Filter for fields of the type Choice

This feature will be described in details in the chapter Filter on the extra fields.

Field ✕

Definition

Name :

Type : ☒ Filter ☐ Type

Length:

Label :

Default:

Colour ▾

Search...

☐ Red
☐ Blue
☐ Yellow

Zoom on clients equipments

Client Equipment: This word "Equipment" can be all kind of objects, equipments that you wish to link to your client: machines, contacts, contracts, files, projects...

What is it used for?

For each client, you will be able to create a list of the different acquisitions or "equipment" in details.

Moreover, for each event assigned to a resource on the schedule, you can precise on which "equipment" you are working.

So, on the client card, you will have the new tab you created with all the list of his equipments:

Client : Client2 ✕

| Machine | ContactMa | Maintenance | Date Beginning | Date End |
|-----------|-----------|-------------|----------------|------------|
| Machine A | 1 | 1 | 03/11/2020 | 06/12/2020 |
| Machine B | 1 | 2 | 23/11/2020 | 27/12/2020 |

And when creating a new job, you will be able to select a client and then the equipment you are working on:

Event

General
Details

Task
Appointment

Task status

Client :
Client2

Resource :
☒ Only one
☐ Several
Christian

Beginning :
09/11/2020
09:00
☐ All day

End
☐ 09/11/2020
12:30
Morning
Afternoon

Machine A 1 1 03/11/2020 06/12/2020
Machine B 1 2 23/11/2020 27/12/2020

Appointment

Recurrence

How to create those "Equipments"?

From PlanningPME, go to the menu "Data" -> "Additional fields" -> Client equipment - Tab
Create all the data you would like to have on each equipment:

Additional data

You can add additional fields located in other tabs

1) Select the data (event, customer or resource)
2) Enter the tab title
3) Add your additional fields

Destination
Client equipment - Tab

Tab title:
Machine

Accessible
test
Admin

Not accessible

Apply

| Field | Type | Label | Column |
|---------------|--------|----------------|--------|
| MACHINE | Text | Machine | 1 |
| CONTACTMA | Yes/No | ContactMa | 1 |
| MAINTENANCE | Choice | Maintenance | 1 |
| DATEBEGINNING | Date | Date Beginning | 1 |
| DATEND | Date | Date End | 1 |

Add

Modify

Delete

Move up

Move down

Then, go to the client card and open the new tab created:

Client : Client2

| Machine | ContactMa | Maintenance | Date Beginning | Date End |
|-----------|-----------|-------------|----------------|------------|
| Machine A | 1 | 1 | 03/11/2020 | 06/12/2020 |
| Machine B | 1 | 2 | 23/11/2020 | 27/12/2020 |

To add new equipment, click on “Add” and fill in the information:

Machine

Machine

Machine

ContactMa ☐

Maintenance

Date Beginning 03/11/2020

Date End 03/11/2020

Select an equipment while creating a new event

Once your client selected, you can then select the equipment on the drop down list.

Event

General Details

Task Appointment

Task status

Client : Client2

Resource : ☐ Only one ☐ Several Christian

Beginning : 09/11/2020 09:00 ☐ All day

End ☐ 09/11/2020 12:30 Morning Afternoon

Appointment

Machine A 1 1 03/11/2020 06/12/2020
Machine B 1 2 23/11/2020 27/12/2020

Recurrence

Select the fields to display on the event window

Select the box “Information” when you create your new field:

Field

Definition

| | |
|----------|--------------------------------------|
| Name : | <input type="text" value="MACHINE"/> |
| Type : | <input type="text" value="Text"/> |
| Length: | <input type="text" value="128"/> |
| Label : | <input type="text" value="Machine"/> |
| Default: | <input type="text"/> |

☒ Information ☐ Tooltip

And you will see it here on the drop down menu of the event window:

Event

General | Details

Task:

Task status:

Client :

Resource : ☐ Only one ☐ Several

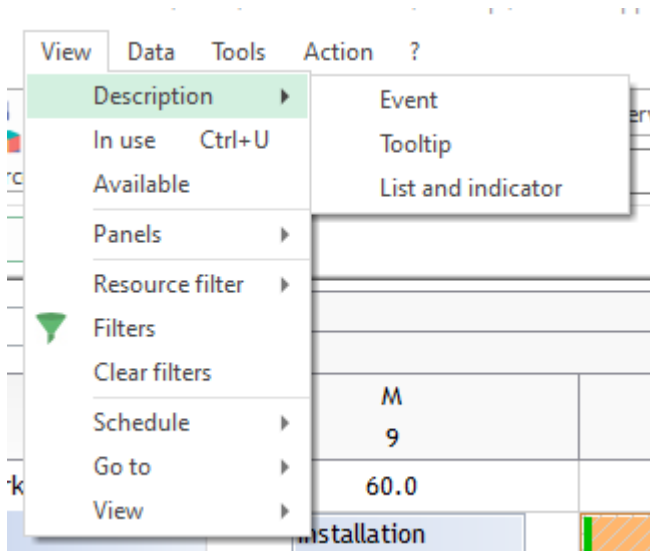
Beginning : ☐ All day

End : ☐

Machine A 1 1 03/11/2020 06/12/2020
Machine B 1 2 23/11/2020 27/12/2020

Select the fields to display on the planning board

From the menu View -> Description -> Event / Tooltip, you can display information on the equipments if you want.



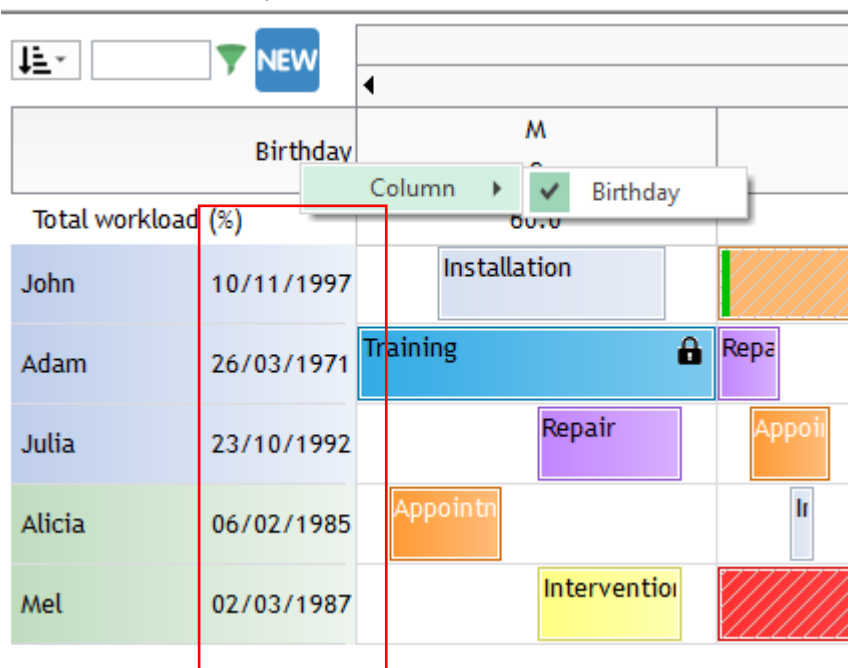
Quick view of the extra fields

For a quicker sight on your additional data, it is now possible to display the content of the extra fields on the schedule. This works for the Resources, the Clients and the Projects.

This is a way to have access to the information entered in your extra fields, as well as a new way to filter your resources, since the content is taken into account by the filter.

Visualisation on a new column

On the planning, you can right-click on the space above the resources to have the menu “Column” appear. Select the extra field you would like to see on the screen and it will be displayed as shown below:



This function is working for the resource, client and project view. So, you can display your specific data easily!

Display the additional fields on the box

From the menu View -> Description -> Event / Tooltip, you can display the extra fields created.

Filter on extra fields

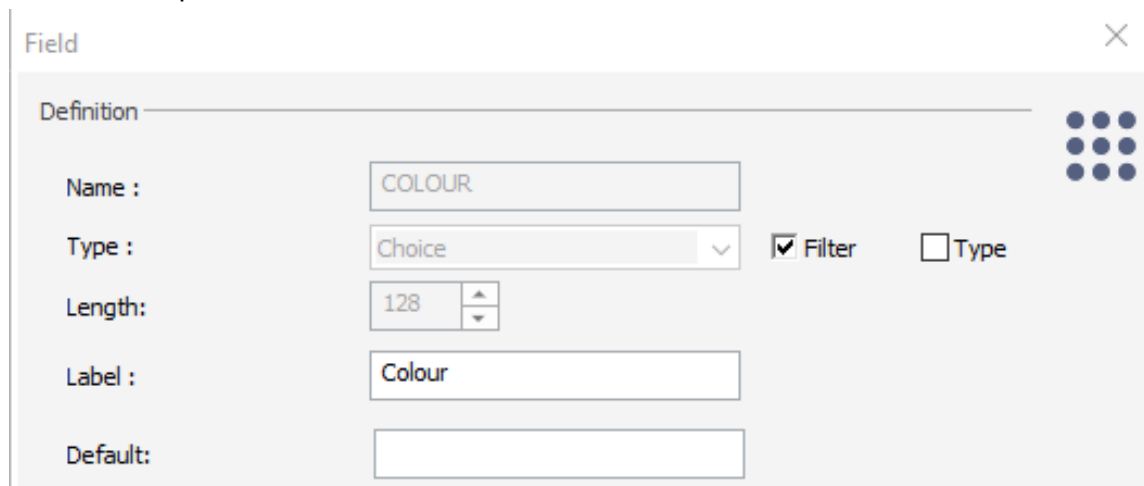
You have different kind of filters on extra fields available.

Create customised filters from fields of the type “Choice”

While creating additional fields of the type “choice”, if you select the option “Filter”, you can show them on the planning board to filter the planning with those specific data.

Activate the filter

Activate the option from here:

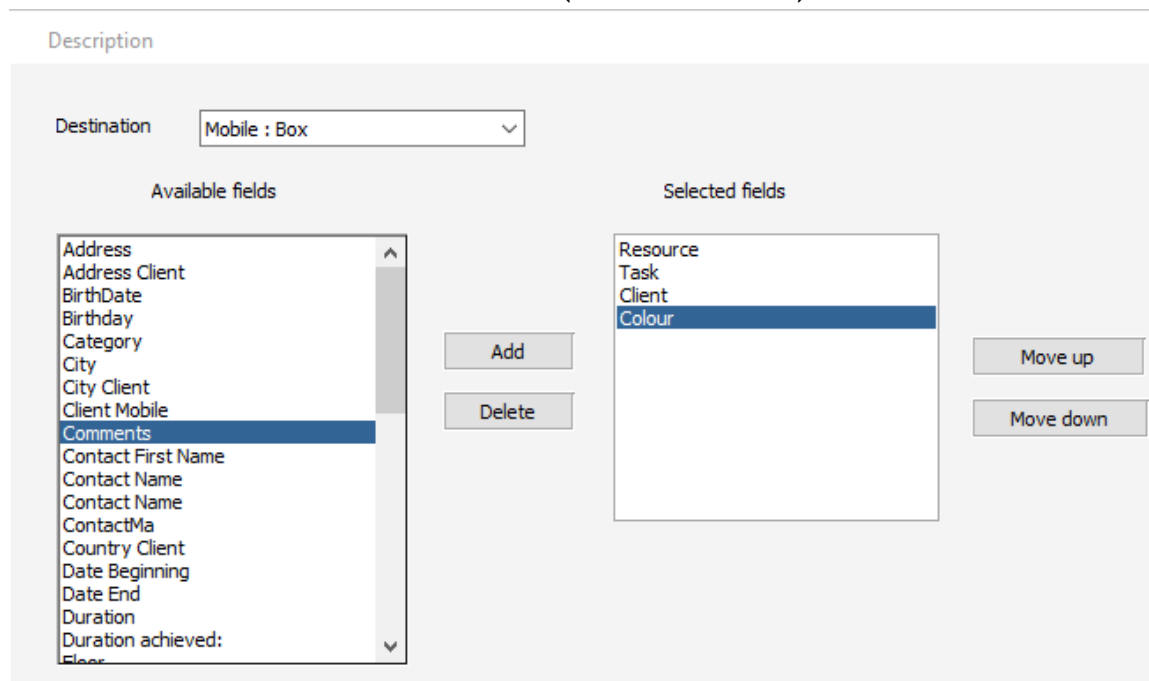


The 'Field' configuration dialog box is shown. It has a title bar with a close button (X). The 'Definition' section contains the following fields:

- Name :** COLOUR
- Type :** Choice (dropdown menu)
- Length:** 128 (with up/down arrows)
- Label :** Colour
- Default:** (empty text box)

To the right of the 'Type' dropdown, there are two checkboxes: ☒ Filter and ☐ Type. In the top right corner, there is a 3x3 grid of blue dots.

AND add it on the View list here to activate (MANDATORY STEP)



The 'Description' dialog box is shown. It has a title bar with a close button (X). The 'Destination' dropdown is set to 'Mobile : Box'. Below this, there are two lists:

- Available fields:** A list of fields including Address, Address Client, BirthDate, Birthday, Category, City, City Client, Client Mobile, Comments, Contact First Name, Contact Name, Contact Name, ContactMa, Country Client, Date Beginning, Date End, Duration, Duration achieved, Floor, etc. 'Comments' is currently selected.
- Selected fields:** A list of fields including Resource, Task, Client, and Colour. 'Colour' is currently selected.

Between the two lists are 'Add' and 'Delete' buttons. To the right of the 'Selected fields' list are 'Move up' and 'Move down' buttons.

Visualisation of the filter

You will see the filter on the screen here:



You can then filter the planning board. Filters are working the same ways as the other filters.

Filter the planning based on an extra field

Once your additional column displayed, you can even filter rapidly the schedule as shown below:

 A screenshot of a filtered planning board in PlanningPME. At the top of the board, there is a header row labeled 'Birthday'. Below this header, there is a list of resources, each with a colored background and their name and birthday. The resources are: John (green background, birthday 10/11/1997), Adam (blue background, birthday 26/03/1971), Julia (blue background, birthday 23/10/1992), Alicia (green background, birthday 06/02/1985), Mel (green background, birthday 02/03/1987), and Tim (green background, birthday not visible). Above the table, there is a filter bar with a dropdown arrow, an empty text input field, a green funnel icon, and a blue button labeled 'NEW'.

| Birthday | |
|----------|------------|
| John | 10/11/1997 |
| Adam | 26/03/1971 |
| Julia | 23/10/1992 |
| Alicia | 06/02/1985 |
| Mel | 02/03/1987 |
| Tim | |

Import your data

You may have already a database with all the information on additional fields you created. For example a list of your resources with information specific to each resource, a list of clients and equipments etc...

To save time, we can develop some scripts to import your data on PlanningPME. The cost will depend on the format of your files to import. Do not hesitate to contact Target Skills.

Customise your schedule with your own dimensions, Menu Data

-> Additional dimensions

Introduction

Together we can go beyond the limits of the planning with 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

1) Managing project steps

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

Project : Project B

| Specification | Dev | Test |
|------------------------------|-----|------|
| Z:\PlanningPME\Nbr_Heure.xls | .. | .. |

2) Managing equipment

Manage the equipment and assign it to employees

Event

| Brand | Type | Number | Pieces |
|----------|--------|---------|-----------|
| Renault | Car | 4012 | Cilo |
| Androide | Tablet | 4785120 | Mini Ipad |

| Brand | Type | Number | Pieces |
|-------|----------|---------|-----------|
| Dell | Computer | 102456 | Precision |
| Apple | Mobile | 7815248 | Iphone |

3) Managing training attendees

Input attendees to your training without considering them as resources.

| Last Name | First Name | Phone Nu... | Client |
|-----------|------------|--------------|--------|
| Franz | Dengel | +49125321... | Dengel |
| Diane | Schultz | +49121532... | Dengel |


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 ✕

Nom : 


Libellé :


Parent


You can now add fields to the PROJECTSTEP dimension:

Dimensions ✕

Dimensions


STEPS



MATERIEL


ATTENDEES

Fields

| Name | Type |
|-------------|--------------|
| Description | Text |
| Document | Link to file |
| On Site | Yes/No |

You can also input steps for your projects:

 Steps (3) ×

Filter

Drag a column header here to group by that column.

| Description | Document | On Site | Project |
|---------------|--------------------------|---------|----------|
| Specification | Z:\PlanningPME\CDC_Sp... | Yes | Projet A |
| Dev | .. | No | Projet B |
| Test | .. | Yes | Projet B |

Steps ×

Général

Project

Description

Document

On Site ☒

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.

Dimension ✕

Name : 


Label :


Parent


You can now add fields to the EQUIPMENT dimension:

Dimensions ✕

Dimensions

 STEPS


 **MATERIEL**

 ATTENDEES

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 Add

Drag a column header here to group by that column.

| Brand | Type | Number | Pieces |
|----------|----------|---------|-----------|
| Apple | Mobile | 7815248 | Iphone |
| Dell | Computer | 102456 | Precision |
| Renault | Car | 4012 | Cilo |
| Androide | Tablet | 4785120 | Mini Ipad |

Equipment

Général

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 ✕

☐ Activate the fast search
☒ Activate the filter
☐ Display the button 'add'
☒ Check the unicity

Fields

| Label | Type |
|-----------------------------|------|
| There are no items to show. | |

You can now allocate equipment in the resource window:

Event

General | Details | Equipment |

<<

| Brand | Type | Number | Pieces |
|----------|--------|---------|-----------|
| Renault | Car | 4012 | Cilo |
| Androide | Tablet | 4785120 | Mini Ipad |

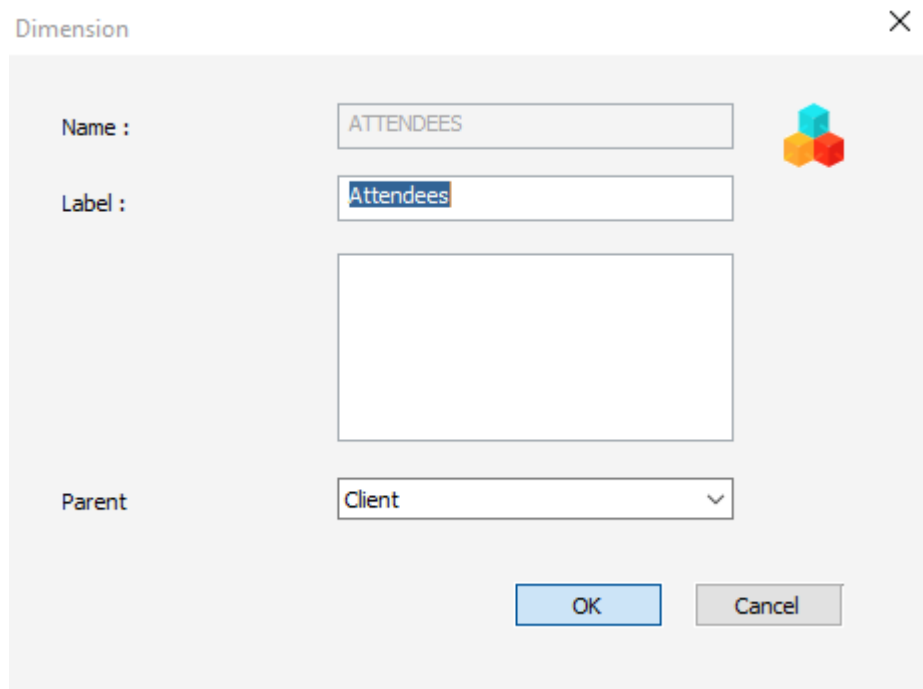
| Brand | Type | Number | Pieces |
|-------|----------|---------|-----------|
| Dell | Computer | 102456 | Precision |
| Apple | Mobile | 7815248 | Iphone |

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

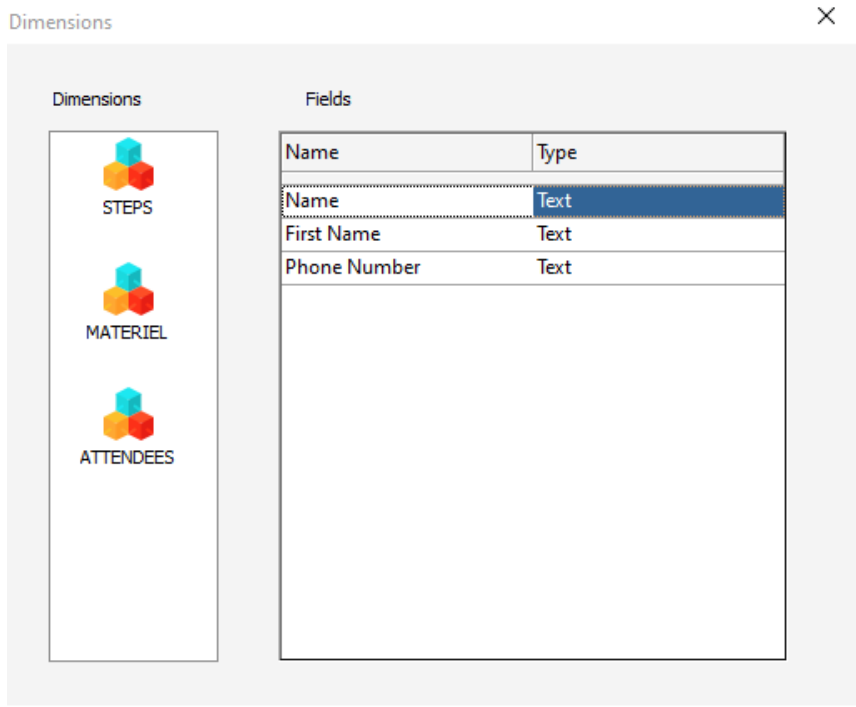
Name : ATTENDEES

Label : Attendees

Parent Client

OK Cancel

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



Field

X

Definition

Name :

Type :

Length:

Label :

Default:

Text

128

☐ Mandatory
 ☐ To type
 ☐ Visible on the mobile version

☒ Information
☐ Tooltip

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

Attendees (2) ✕

Filter

Drag a column header here to group by that column.

| Name | First Name | Phone Number | Client |
|----------|------------|--------------|---------|
| Herve | Dupont | 0161612090 | Client1 |
| Philippe | Rene | 0161618090 | Client1 |

Attendees

Général

Client

Name

First Name

Phone Number

You can also find the attendees in the customer window.

Client : Client1 ✕

Informations
Machine
Attendees
Events

Filter Add

Drag a column header here to group by that column.

| Name | First Name | Phone Number | Client |
|----------|------------|--------------|---------|
| Herve | Dupont | 0161612090 | Client1 |
| Philippe | Rene | 0161618090 | Client1 |

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 event** (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.

Relation ✕

Task ▼

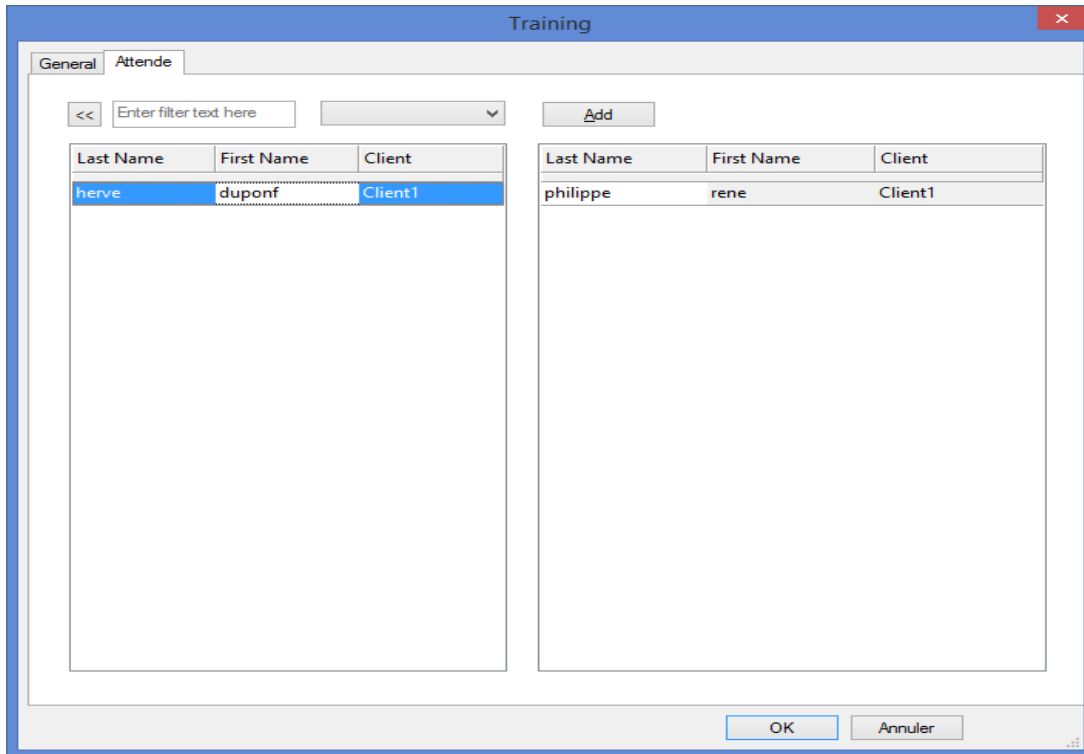
☐ Activate the fast search
☒ Activate the filter
☐ Display the button 'add'
☒ Check the unicity

Fields

| Label | Type |
|-----------------------------|------|
| There are no items to show. | |

OK
Cancel

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

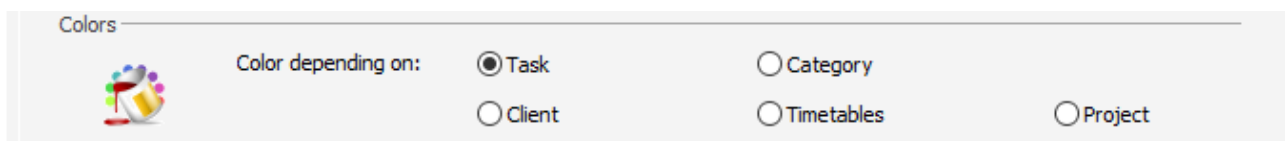


Select your preferences

Colours on the planning board

From the menu Tools -> Options -> Display, you can select color on your planning board.

Select the colour displayed for the box



On the schedule, each event is represented by a colored rectangle.

This color can be displayed depending on different types of fields:

- *Task label*
- *Category of the event*
- *Client*
- *Slots*
- *Project*

So, in order to recognize easily all events associated to a client, you can choose to display events depending on the client color.

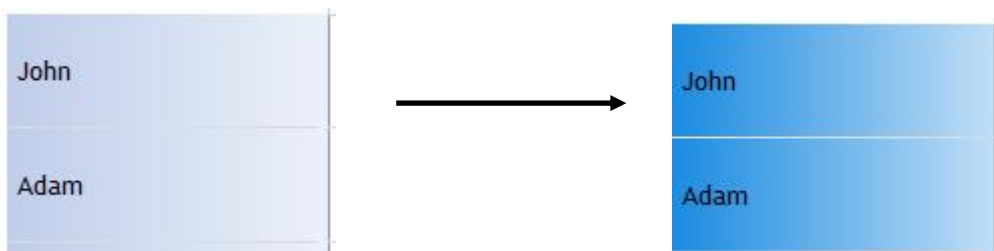
Select the colour by default

You can select colours by default for all those different items:

| | | | |
|-----------------|----------------------|-------------|----------------------|
| First day : | <input type="text"/> | Second day: | <input type="text"/> |
| Public holidays | <input type="text"/> | Days off : | <input type="text"/> |
| Resource | Background | | Text |
| Task | <input type="text"/> | | <input type="text"/> |
| Client | <input type="text"/> | | <input type="text"/> |
| Unavailability | <input type="text"/> | | <input type="text"/> |
| Place: | <input type="text"/> | | <input type="text"/> |
| Project | <input type="text"/> | | <input type="text"/> |

Play with the events gradient colours


Gradient colours:



From the menu Tools -> Option -> User, you can activate options in order to play with gradient colours and corners.

Options

Timetables | Display | Data | Event | Outlook | User | advanced |



Task

☒ Gradient colours

☐ Description always visible

☒ Drag and drop confirmation

☐ Events not visible on days not worked

Resource

☒ Gradient colours

☐ Count the time during days not worked

Filters

☐ Adapt the project filter depending on the client

☐ Filter the lines

Time Axis

☒ Gradient colours for Year

☒ Gradient colours for Month

☒ Gradient colours for Week

☒ Gradient colours for Day

☒ Gradient colours for Hours

☐ Display week numbers in the calendar

First week of the year

First week with 4 days

browsing

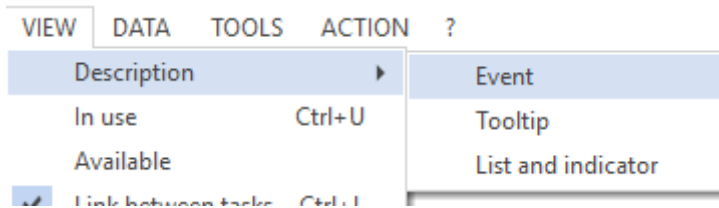
☐ Loading the schedule per page

OK

Cancel

s Lecteur P

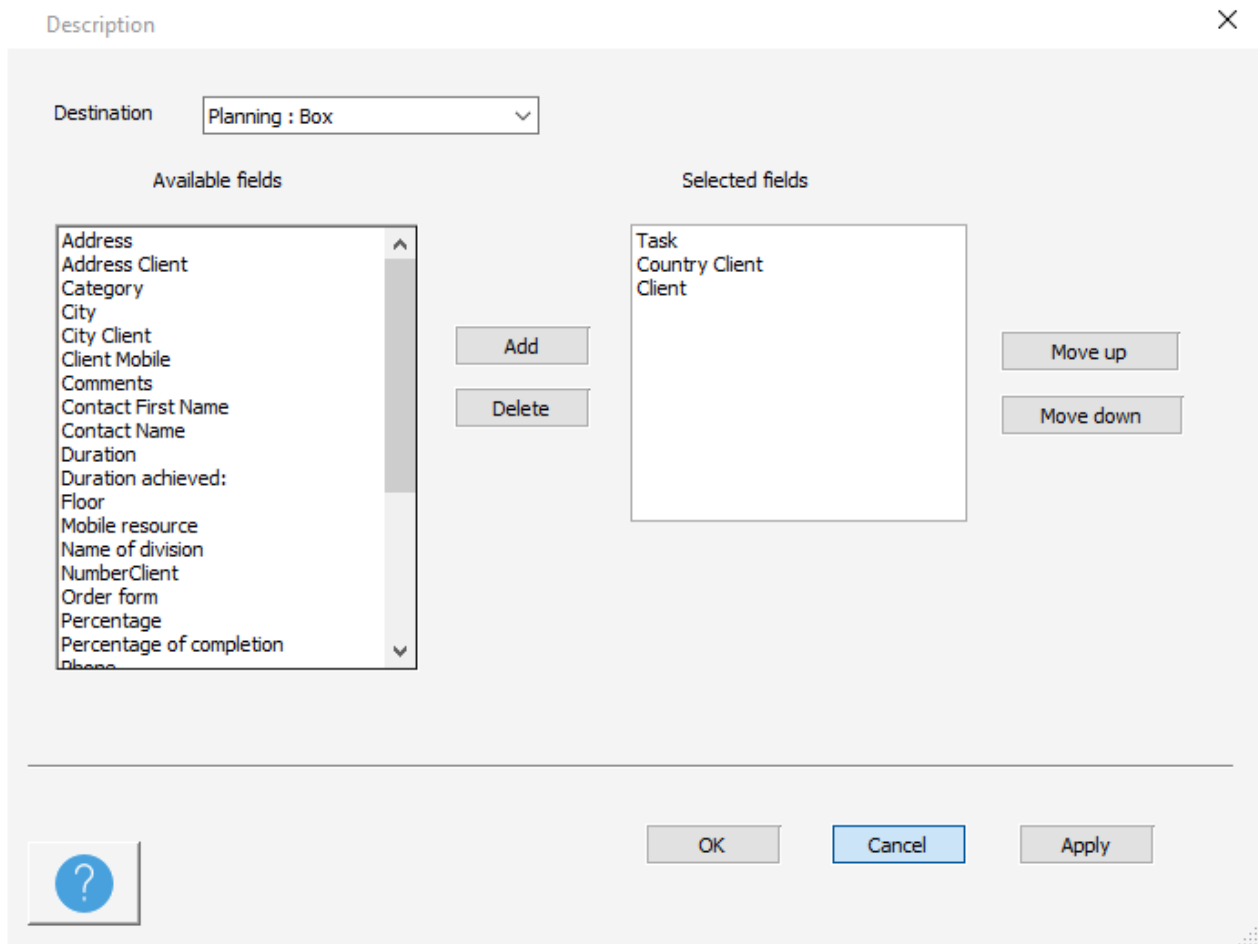
Select fields displayed for the box, the tooltip and the list view



From the menu View -> Description, you can select the information you want to see on the following destinations:

- Event: Boxes that represent events
- Tooltip
- List and indicator

The window below appears.



Select the fields with a double click on the field or selecting the field and then “Add” button.
Start a new line: This field allows you to have your description display on several lines.

Fields within the event box

Fields displayed on the box that represent an event:

Maintenance Germany Client1

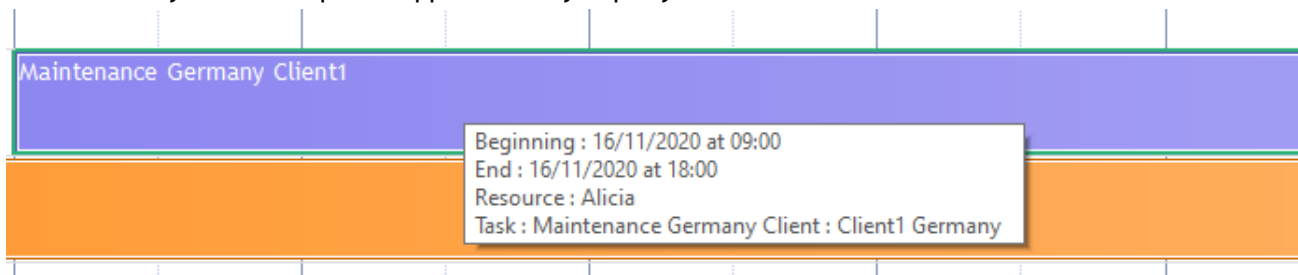
Note that this description is adapted to each view:

On the client view, the name of the client will not appear.

On the Project view, the name of the project will not appear...

Tooltip

Fields on the yellow tooltip that appear when you put your mouse on an event:



List and indicators

You can add your additional fields on those views.

| PROJECT | BIRTH DAY | COLOUR ▼ |
|---------|------------|----------|
| | | Yellow |
| | | Yellow |
| | | Yellow |
| | | Yellow |
| | | Red |
| | | Red |
| | | Blue |
| | 30/03/1979 | Blue |

Timetable preferences

From the menu Tools -> Options -> Timetable, you can select different customised settings for week and hours preferences.

Options

Timetables | Display | Data | Event | Outlook | User | advanced

Working week

☒ Monday ☒ Tuesday ☒ Wednesday ☒ Thursday ☒ Friday ☐ Saturday ☐ Sunday

First day of the week: Monday

Timetables

Beginning: 08:00 End: 18:00 Morning: 09:00 - 12:30

Hours per day: 07:00 Afternoon: 13:30 - 18:00

Beginning of night hours: 21:00 End of night hours: 05:00

Working week

Select the days you usually work on from the wizard. Then, the default profile of your resources will take into account those settings.

For example, if you do not work on Saturday and Sunday, the default profile for each resource will be the same.

First day of the week

Select the first day of week. Then, on the calendar, the first column will be the first day selected:

novembre 2020

| lun. | mar. | mer. | jeu. | ven. | sam. | dim. |
|------|------|------|------|------|------|------|
| 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 30 | 1 | 2 | 3 | 4 | 5 | 6 |


Today: 03/11/2020

And on the planning board, the week will be delimited as shown below:

| Week 49 | | | | | | |
|---------|---|---|---|---|---|---|
| M | T | W | T | F | S | S |
| 30 | 1 | 2 | 3 | 4 | 5 | 6 |

Timetables

Timetables

 Beginning End Morning -




Hours per day : Afternoon -

Beginning of night hours End of night hours

You can select your time preferences here. They will be displayed then while selecting the views morning, afternoon, day.

PlanningPME Orion - Z:\Exemple\PPME-EN.pp - Admin

File Edit View Data Tools Action ?

 15  Weekly  All Services

Calendar

novembre 2020

| | LU | MA | ME | JE | VE | SA | D |
|----|----|----|----|----|----|----|---|
| 44 | 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 45 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 46 | 9 | 10 | 11 | 12 | 13 | 14 | 1 |
| 47 | 16 | 17 | 18 | 19 | 20 | 21 | 2 |

Unavailability

LABEL

lundi 16 novembre 2020

NEW

M

16

40.0

Appointment

Int

Morning

Afternoon

Daily

Weekly

Monthly

Customised

bimonthly

Quarterly

Biannual

Yearly

Beginning and End time

While displaying the daily view, the time selected will be displayed.

Morning

While displaying the morning view, the time selected will be displayed.

Afternoon

While displaying the afternoon view, the time selected will be displayed.

Beginning of night hours


This setting will be used on Excel Pivot table to make reports on night hours.

Preferences of the planning from the Language menu

From the menu Tools -> Language, you can select different customised settings.

Labels and formats



 English ▼ Save Open all / Close all

| | |
|--|-----------------------|
| ▲ Expressions related to resources | |
| Resource | Resource |
| Department | Department |
| All Services | All Services |
| Skill | Skill |
| ▶ Human resource | |
| ▶ Material resource | |
| ▲ Expressions related to events | |
| Task | Task |
| New task | New task |
| Category | Category |
| Task status | Task status |
| ▶ Slots | |
| ▶ Tabs | |
| ▲ Expressions related to unavailabilities | |
| Unavailability | Unavailability |
| New unavailability | New unavailability |
| Unavailability status | Unavailability status |
| ▲ Expressions related to clients | |
| Client | Client |
| ▶ Tabs | |
| ▲ Display formats | |
| Hour | HH:mm |
| Short date | dd/MM/yyyy |
| Long date | dddd, dd MMMM, yyyy |
| Decimal separator | , |
| Number of Decimal points | 2 |

OK Cancel

Language

Select your language. You can define the language per computer.

The software PlanningPME is available in: french, english, german, spanish, dutch, italian, swedish

Terms

You can rename different fields in order to customise the planning to your activity.

A client can be renamed a customer. A Task can be a mission....

The changes made will be transferred in the menu "Data" and in the filters and different windows name.

You can rename different fields in order to customise the planning to your activity.

Other

Number of decimal points

It is possible to choose the number of decimal points.

| | |
|--------------------------|---|
| Number of Decimal points | 2 |
|--------------------------|---|

Decimal Separator

In function of the countries, the decimal separator can be:

A comma or a point.

From this menu, you can customize it:

| | |
|-------------------|---|
| Decimal separator | , |
|-------------------|---|

NB: you will need to set up this option correctly in order to use Excel Pivot Table.

Monetary symbol

You can choose between all the currencies listed.

Hours and dates format

You can select the format of hours and dates.

| Display formats | |
|--------------------------|----------|
| Hour | HH:mm |
| Short date | hh:mm tt |
| Long date | hh:mm tt |
| Decimal separator | HH:mm |
| Number of Decimal points | HH:mm |
| Monetary symbol | € |

Hour

OK Cancel

| Display formats | |
|--------------------------|------------|
| Hour | HH:mm |
| Short date | dd/MM/yyyy |
| Long date | dd/MM/yyyy |
| Decimal separator | MM/dd/yyyy |
| Number of Decimal points | M/d/yyyy |
| Monetary symbol | M/d/yy |

Short date

MM/dd/yy
yy/MM/dd
yyyy-MM-dd
d-MMM-yy

OK Cancel

| Display formats | |
|--------------------------|-------------------|
| Hour | HH:mm |
| Short date | dd/MM/yyyy |
| Long date | ddd, dd MMM, yyyy |
| Decimal separator | ddd, dd MMM, yyyy |
| Number of Decimal points | ddd, MMM dd, yyyy |
| Monetary symbol | MMMM dd, yyyy |

Long date

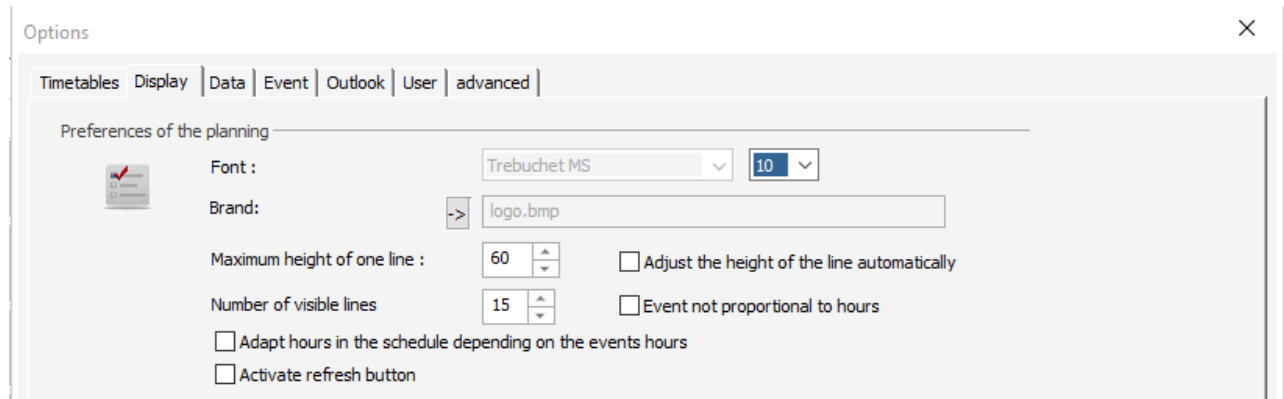
OK Cancel

Other preferences

You can customise the planning to your activity selecting the colours, renaming some terms etc...

Preferences of the planning from the Options menu

From the menu Tools -> options -> View, you can select different display options.



Font and size

Choose the font: type and size; This font will be applied on all the schedule.

Brand

Select your logo. Optimal resolution: 45*45 (pixels) and bitmap format.

Maximum height of one line

You can raise the height of your lines for a better visibility.

Number of visible lines


You can select the number of lines displayed on your screen.

Display the event on all the day whatever its duration

If you want to see more information, you can select the option: Events not proportional to hours.

All the events on your planning board will appear on the whole day whatever the real duration as in the example below.

Timetables | Display | Data | Event | Outlook | User | advanced |

 Task

☒ Gradient colours ☐ Events not visible on days not worked

☐ Description always visible

☒ Drag and drop confirmation

Resource ☒ Gradient colours

Filters

☐ Adapt the project filter depending on the client

☐ Filter the lines

☐ Count the time during days not worked

Time Axis

☒ Gradient colours for Year ☐ Display week numbers in the calendar

☒ Gradient colours for Month

☒ Gradient colours for Week

☒ Gradient colours for Day

☒ Gradient colours for Hours

First week of the year First week with 4 days ▾

browsing

☐ Loading the schedule per page

OK Cancel

First week of the year:

Week including the 1st of January or not.

Display the week number

| | | | | | | | |
|-------------------|-----------------------|------|------|------|------|------|------|
| ◀ | lundi 9 novembre 2020 | | | | | | 📅 |
| ◀ novembre 2020 ▶ | | | | | | | |
| | lun. | mar. | mer. | jeu. | ven. | sam. | dim. |
| 44 | 26 | 27 | 28 | 29 | 30 | 31 | 1 |
| 45 | 2 | 3 | 4 | 5 | 6 | 7 | 8 |
| 46 | 9 | 10 | 11 | 12 | 13 | 14 | 15 |
| 47 | 16 | 17 | 18 | 19 | 20 | 21 | 22 |
| 48 | 23 | 24 | 25 | 26 | 27 | 28 | 29 |
| 49 | 30 | 1 | 2 | 3 | 4 | 5 | 6 |
| Today: 05/11/2020 | | | | | | | |

Why should you hide the week number?

It appears that depending on your Windows version, the week number is not the same as the one you selected as “First week of the year”. This is not something that can be changed by Target Skills as there is no solution yet on the market to solve this problem. That is why you have the option to hide the week number if ever it does not correspond to your selection of “First week of the year”.

Non working days keep visible

It is now possible to keep visible non working days.

For example, you have an event on several days as shown below:

| | | | |
|--------|-------------------------------|-----------------------------|----------------------------------|
| John | Installation | Day off | Day off |
| Adam | Training France Target Skills | Repair France Target Skills | Appointment France Target Skills |
| Julia | | Installation PPMENL | |
| Alicia | Appointment | Installation | Maintenance |
| Mel | Training | Paid leave | Paid leave |

Now, from the menu Tools -> Options -> User, you can select the option “Events not visible on days not worked”.

You will then see the days not worked:

| November 2020 | | | | | | | | | | | | | |
|---------------------|----------|----------|---------|---------|---------|---------|---------|--------------|---------|---------|---------|---------|---------|
| Week 46 | | | | | | | Week 47 | | | | | | |
| | T 10 | W 11 | T 12 | F 13 | S 14 | S 15 | M 16 | T 17 | W 18 | T 19 | F 20 | S 21 | S 22 |
| Number of trainings | 3 | | | | | | 1 | | | | | | |
| Total workload (%) | 80% | | | | | | 100% | | | | | | |
| John | Day off | | Day off | | | | Appoi | | | | | | |
| Adam | Repair | Appoi | Instal | Repair | | | Interv | Intervention | | Interve | | | |
| Julia | | | | | | | | | | | | | |
| Alicia | Install | Main | Appoi | | | | Mainte | | | | | | |
| Mel | Paid lea | Paid lea | | Appoi | | | Appoin | Appoin | | | | | |

NB: If you plan events on days not worked, they will not be displayed if you select this option!

Search, Analyse and Print your data

Search your data and search available resources

Several types of search are available in PlanningPME.

- Function "Search" (CTRL + F)

It is a search of events by keywords.

- **Search for availability:** You can search for the availability of your resources in order to assign them an event of certain duration, at a certain date depending on their skills.

Function "Search" (CTRL + F)

Find out easily your events thanks to keywords on a crowded schedule.

From PlanningPME, go to the menu "Edit" -> "Search" or press simultaneously the touch "CTRL" and "F" or click on this icon :



The window below appears

Find

Search: *meet* Year: Find Copy Export

The symbol * means that some text is located before or after the keyword.

| 4 types of search | Search example | Result example |
|--|----------------|-----------------------------|
| Exact search | Training | Training |
| Keyword at the end of the sentence | *client | Appointment with the client |
| Keyword at the beginning of the sentence | Intervention* | Intervention from 2pm |
| Full search | *advanced* | Word advanced training |

☒ Task ☐ Comments ☐ Client ☐ Number ☐ Project
☐ Estimate ☐ Order form ☐ Bill

| BEGINNING DATE | ENDING DATE | LABEL | RESOURCE | CATEGORY | PERCENTAGE |
|----------------|-------------|---------|-------------------|----------|------------|
| 13/11/2019 | 13/11/2019 | Meeting | Megan Cox | Planned | 100% |
| 10/09/2019 | 12/09/2019 | Meeting | Céline Troc | Planned | 100% |
| 06/09/2019 | 06/09/2019 | Meeting | Paul Grant | Planned | 100% |
| 16/07/2019 | 16/07/2019 | Meeting | Paul Grant | Planned | 100% |
| 16/04/2019 | 16/04/2019 | Meeting | Paul Grant | Planned | 100% |
| 16/04/2019 | 16/04/2019 | Meeting | Paul Grant | Planned | 100% |
| 15/04/2019 | 15/04/2019 | Meeting | Jackie Washington | Planned | 100% |
| 15/04/2019 | 15/04/2019 | Meeting | Christian Damon | Planned | 100% |
| 15/04/2019 | 15/04/2019 | Meeting | Céline Troc | Planned | 100% |
| 11/06/2019 | 11/06/2019 | Meeting | Daniel Pitt | Planned | 100% |
| 11/06/2019 | 11/06/2019 | Meeting | Céline Troc | Planned | 100% |
| 11/06/2019 | 11/06/2019 | Meeting | Paul Grant | Planned | 100% |
| 11/06/2019 | 11/06/2019 | Meeting | Megan Cox | Planned | 100% |

Find an event

To find out your events easily, here is the way to proceed:

- 1 - Enter the keyword
- 2 - Choose the field where your keyword is present: event, comments, client or client N° ...
- 3 - Click on the button « Find »

Results are then displayed on the results window.
For a best result, you can use the symbol '*'.

The symbol * means that there is some text before or after the keyword.
4 types of search are available:

- **Exact search**

Example of search: Training

Example of results: Training

- **Keyword at the end of the sentence**

Example of search: *client

Example of results: Maintenance *client*

- **Keyword at the beginning of the sentence**

Example of search: Intervention*

Example of results: *Intervention* from 1pm.

- **Full text search**

Example of search: *advanced*

Example of results: Word *advanced* training

Open or Delete an event

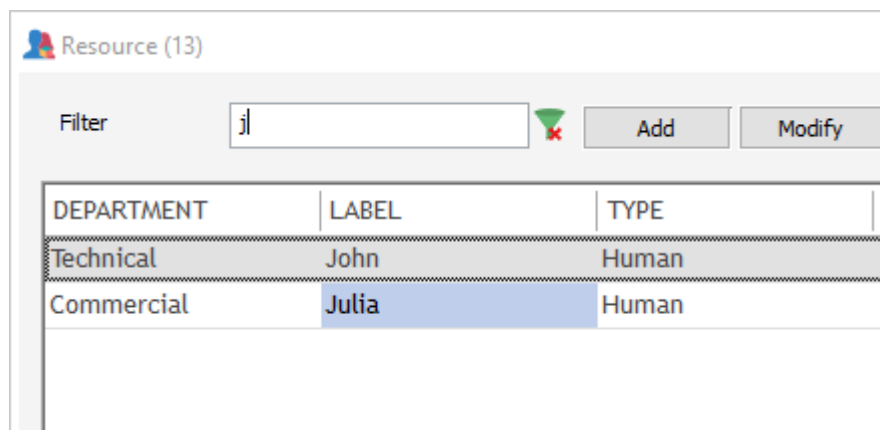
You can open or delete an event selecting one of the results and then, right click, "Open" or "Delete".

Search on additional fields

Now, you can make a search on the additional fields you created.

Search for resources, clients and projects

From the menu Data



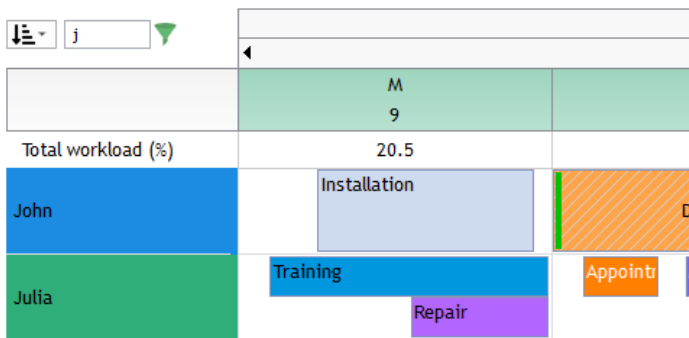
The screenshot shows a window titled 'Resource (13)' with a search filter 'jl' and a table of resources. The table has columns for DEPARTMENT, LABEL, and TYPE. The results are as follows:

| DEPARTMENT | LABEL | TYPE |
|------------|-------|-------|
| Technical | John | Human |
| Commercial | Julia | Human |

While typing the first letters of the name of a resource, only resources beginning by those letters appear.
This new function also works on clients and projects.

From the planning board directly

You now have a fast "typing" zone at the left top side of the planning board:




So, when you type the label, the lines are filtered and the software is doing a full search.
This fast search is working on all the views of the planning board like the client view or the project view.

From the event window


Event

General

Project : 

Task


Task status

Client : 

When creating a new event, you can search by the project name or the client name pressing the “glass” icon.

Search for available resources

This function allows you to find easily the resources available for a specific event without having to check on your crowded screen.

From PlanningPME, go to the menu "Action" -> "Availability" or click on this icon: 
The window below appears.

Search availability

From :

10 November , 2020

08:00:00

Up to

☐

3 November , 2020

16:19:43

Task

Installation

Skills

Length:

3

☐ Hours
☒ Days

Resource

Filter :

All departments

☐ Under contract of employment

Find

Clear

| BEGINNING | END | RESOURCE | CITY | COUNTRY |
|------------------|------------------|----------|------|---------|
| 20/11/2020 00:00 | 24/11/2020 00:00 | Mel | | |
| 17/11/2020 00:00 | 19/11/2020 00:00 | Hugh | | |
| 20/11/2020 00:00 | 24/11/2020 00:00 | Mel | | |
| 17/11/2020 00:00 | 19/11/2020 00:00 | Hugh | | |
| 05/11/2020 00:00 | 09/11/2020 00:00 | Truck B | | |

Select your criteria, launch the search, visualize your resources availabilities and select the resource to assign

Settings to find your available resources

Choose those different parameters:

-> From – Up to

Select the period you want to make your search on

-> Task

Select the task to perform on the list.

-> Skills

If you select a task with skills predefined, only skilled resources will be displayed.

If you do not select any task label, you will be allowed to add a specific skill that your resource must have to perform the job.

NB: To search for skilled resources, you must not select any task label.

-> Length

Duration of the task in hour or in days

-> Resource

Filter by department and even more precisely, by resource if needed.

You can also filter by resource under contract only.

-> Find button

Click on the button "Find": all resources with the skills mentioned and their first availability date will be displayed on the screen, at the right side of the window.

Create your event

Select the resource available that will do the job, right click and select "New event".

The screenshot shows a window titled "Search availability". On the left, there are search filters: "From:" (10 November, 2020), "Up to:" (3 November, 2020), "Task:" (Installation), "Length:" (3), and radio buttons for "Hours" and "Days". On the right, there is a table with columns: BEGINNING, END, RESOURCE, CITY, and COUNTRY. The table contains several rows of data. A right-click context menu is open over the row with BEGINNING "17/11/2020 00:00", END "19/11/2020 00:00", and RESOURCE "Hugh", showing options "New task" and "Go to".

| BEGINNING | END | RESOURCE | CITY | COUNTRY |
|------------------|------------------|----------|------|---------|
| 20/11/2020 00:00 | 24/11/2020 00:00 | Mel | | |
| 17/11/2020 00:00 | 19/11/2020 00:00 | Hugh | | |
| 20/11/2020 00:00 | 24/11/2020 00:00 | Mel | | |
| 17/11/2020 00:00 | 19/11/2020 00:00 | Hugh | | |
| 05/11/2020 00:00 | 09/11/2020 00:00 | Tru | | |

Your event will then open.

Option "Go to"

This option shows you on the screen the period of the result before you decide to create the new event.

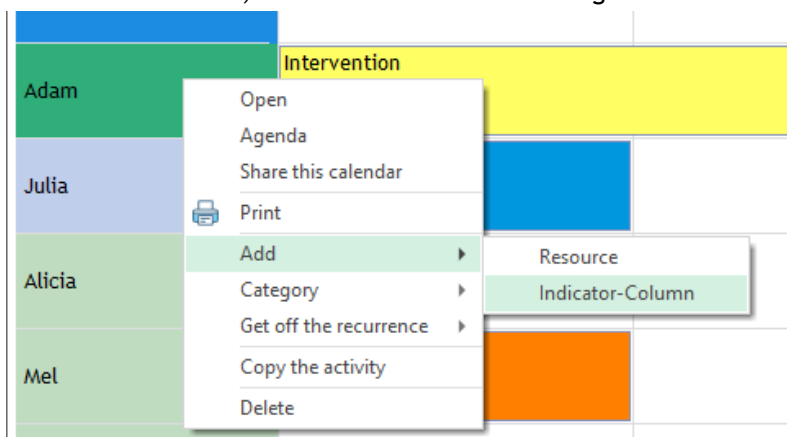
Indicators: Planning data displayed on real time

What is an indicator?

The indicators show real-time **calculated data** based on the information contained within the schedule. They are displayed as lines, columns over a daily, weekly or monthly view. This way you can see for instance, the number of a certain type of events, the total duration of another one over a week or the number of not worked hours for one or several resources.

How to create an indicator?

When doing a right-click on the resources column the following menu appears:
You can select Add, and the sub menu containing 'Resource' and 'Indicators' appears.



The Indicator menu

A screenshot of the 'Indicator-Column' configuration dialog box. The dialog has a title bar with a close button (X). It contains several sections: 'Count' with a text input field; 'Data' with a dropdown menu set to 'Events duration' and a 'No Target' button; 'Field' with a dropdown menu and a 'No criterion' button; 'Format' with a dropdown menu set to 'Hour'; 'Display' with a 'Label' text input field; 'Colors' with 'Background' and 'Text' color pickers and a 'No threshold' button; 'Height' with a numeric input set to 25 and up/down arrows; 'Position' with radio buttons for 'Up' (selected) and 'Down'; 'View' with a dropdown menu set to 'Resource'; and checkboxes for 'All Services' (checked) and 'Private' (unchecked).

Count

In the first section of the menu, you need to specify what data the indicator is going to be showing. Here is the explanation of the different elements from this menu:

1: Data.

This is the type of the indicator; you have the choice between those items:

| Type | Description | How to use it |
|------------------------|---|--|
| Additional Field | You have the possibility to process data entered in the additional fields of the events, clients, or resources. | You have to create extra fields first. Then, Go to menu View -> Description -> List and Indicator and add the fields you will need to be processed by the indicator. |
| Duration of the events | With this option, the indicator will display the duration of the selected element. Number of hours of any given task, duration of an unavailability, etc... | Add a criterion in the field [4], specifying the Label of the event, and validate |
| Effective Capacity | This represents the 'workable time' for a resource, based upon his/her time slots and the unavailabilities. | Add a criterion in the field [4] and specify the label of the resource. |
| Not Worked time | The global not worked time of the resource. | Add a criterion and specify the label of the resource. |
| Number of events | The indicator will display how many events there is, per day. | Add a criterion and specify the label of the event / task. |
| Theoretic capacity | Work time for a resource based on the total of hours from his/her time slots. | Add a criterion and specify the label of the resource. |

2: Target

This value represents the maximum value to-be-reached for the indicator. It is displayed behind a '/' symbol.

Example: an indicator showing the Effective Capacity over the Theoretic capacity:

Select Effective Capacity, and click on [Target], Select Theoretic Capacity. Validate, Select a Label for your indicator, set a colour, and validate. Your indicator now shows the total of workable hours out of the total work time of your resources.

3: Field

If you have added an extra field to the List and Indicator option, you will be able to select this field in the drop down menu, and have the indicator display its value. Only 'number'-format fields are processed.

4: Criteria

It is possible to add conditions related to the information you want to be displayed. You might want to have the amount of time spent in a certain type of task displayed in the indicator, but you can refine it so that it is limited to one or several resources, clients, departments, categories etc...

Example:

Select duration of the events, and add a [Target]:

- Duration of the events

- Criterion 1: Task . Label . = . “Meeting” (for instance)

Close the target Window

Select the criteria for our indicator:

- Criterion 1: Resource . Label . = . “Denis EMART”
- Criterion 2: Task . Label . = . “Meeting”

Select the ‘Hour’ Format.

Add a name, a colour and the location of your indicator, validate, and you should have on your planning the hours spent in morning meetings for your Manager over all the hours spent in morning meetings for everyone:

| Meeting Mr Denis EMART | 0.0/0.0 | 8.0/16.0 |
|------------------------|---------|-----------------------------------|
| Denis EMART | | Meeting 1.0 day(s) 09:00-18:00 |
| Rémi ALBERT | | Meeting 1.0 day(s) 09:00-18:00 |

5: Format

You can select in which units you want the indicator to convert the data.

- Day: The duration will be displayed in days.
- Difference (Days): A calculation will be made between the duration of the [Target] and the Duration of the [Criterion] of the indicator.
- Difference (Hours): Same operation but measured in hours.

Example:

The [Target] is the hours of ‘Support’ of one resource.

- Duration of the events
- Criterion 1: Ressource . Label . = . “Fidel Sporcic”
- Criterion 2: Task . Label . = . “Support”

The [Criterion] of the indicator is the global amount of Support hours.

- Duration of the events
- Criterion 1: Task . Label . = . “Support”

Select ‘Difference (Hours)’ format, add name, colour, position, and validate.

Your indicator will display on the screen.

- Hour: the time will be counted in hours
- Percentage: If you need to show a ratio
- Value: used for counting number of occurrences, extra fields values, any number that is not a duration nor a ratio.

View

6 - Label: You can set a name for the indicator, describing what this indicator stands for.

7 - Colors: This is the background colour of the indicator, as well as the color of its line on the planning.

8 - Threshold: If the indicator exceeds the threshold value, then the corresponding color will be displayed on the schedule.

9 - Height: The height of lines can be modified in this menu; you can also modify it directly by click-holding and moving the top or bottom line of the indicator on the planning.

10 - Position: The indicator will be placed either above or below all the resources. The position is dynamic and will automatically remain atop or at the bottom of the schedule.

11 - View: You can have the indicator displayed only on certain views; you can choose the view in this drop down list.

12 - All Services: The indicator will be shown on every service by default. You can specify on which service view it will appear if you need to restrain the access to the indicator.

13 - Private: the indicator will only be displayed for the current user, other users will not have access to this indicator. Is opposed to the 'All services' option.

14 - Comments: Comment section for the indicator. The comment is displayed as a tooltip when you point at the indicator on the schedule.

Using the indicators

Limiting the number of -a task- on the schedule

The management department cannot have more than 4 trainings a day with the clients.

We will define an indicator showing us when there are more events of this type than there must be planned.

- 1) Select number of events. Add a criterion Task . Label . = . Training, validate. Select 'Value' as format.
- 2) Add a name and a colour, click on threshold. Add a threshold which value is 4 with a red colour.

| | M 9 | T 10 |
|---------------------|--------------|---------------------|
| Number of trainings | 4 | 1 |
| Total workload (%) | 100% | 75% |
| John | Installation | Day off |
| Adam | Training | Repai Installation |
| Julia | Repair | Appoint Mainte Inte |
| Alicia | Appointme | Ir Training |
| Mel | Training | Paid leave |
| Tim | Training | Mainter R |

The Indicator turns red.

- This method can also be used to monitor how many of a task is done each day, or week.

The Not-worked time of a department

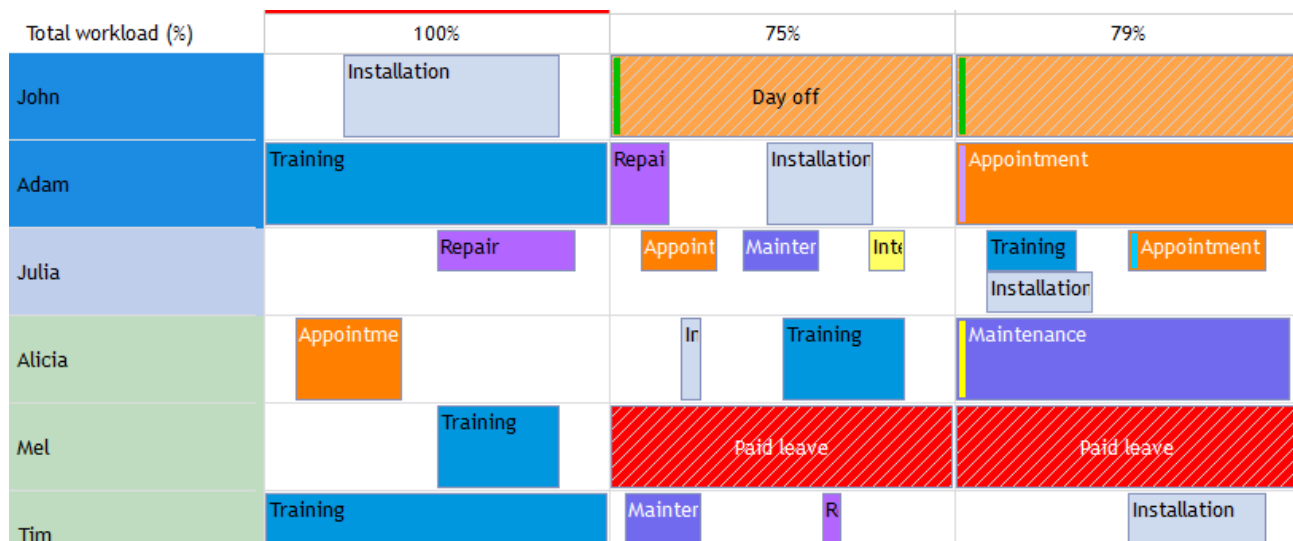
The Not-worked time can be assimilated to the time left to a resource or a group of resources. We will define an indicator showing the percentage of time remaining to a department.

- 1) Select 'Not worked time', add as criterion :
- Department . Label . = . 'Accounts'
- 2) Add as format : 'Percentage'

You will notice that there is no immediate effect, indeed, we need a reference to build the ratio; we will add a [Target] to have the results.

- 3) Select 'Theoretic Capacity', validate

The theoretic capacity is the number of hours that a resource must work as defined in the time slots. The program uses this value as a reference.



Statistics from the menu Tools -> Statistics

Statistics defined on the software: Statistics by day, week or month of the hours worked by resource...
You can then make some statistics from this window pressing the button “Statistics”:

Statistics

Type : ☒ Task ☐ Unavailability ☐ Task

Statistics : ☒ Resource ☐ Task ☐ Client

Unit : ☒ Hour ☐ Day ☐ Number

Beginning date : 09-Nov-20 Filter : Commercial

End date : 15-Nov-20 Column : Week

Statistics

Copy

Export

| Resource | W46 | Total | Workload | Cost | Billing |
|----------|-------|-------|----------|------|---------|
| Julia | 25.25 | 25.25 | 92 % | | |
| Alicia | 23.50 | 23.50 | 67 % | | |
| Mel | 11.00 | 11.00 | 91 % | | |
| Tim | 26.25 | 26.25 | 75 % | | |
| Total | 86.00 | 86.00 | | | |

Criteria to select

Type

Choose whether you want to make statistics on your events, unavailabilities or contexts.

Statistics

Select the data on which you want to make your statistics: resources, events or clients

Unit

Have your statistics displayed on hours, days or number.

What is the unit “Number”?

While selecting this unit, the number of events or resources working on the period selected are counted.

-> **Statistics on resources:** The number shows the number of events for each resource.

-> **Statistics on event:** The number shows the number of resources for that event.

In the example below, we have four resources that had a development on 28:

-> **Statistics on client**

The number shows the number of resources working for this client.

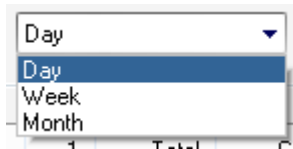
Dates

Give the beginning and the ending date for your statistics

Filter

It is the filter by departments. Make statistics on all your resources or on a particular department.

Column



Choose if you want your statistics to be displayed by day, week or month.

Buttons description

Button Statistics

Press the button to have your statistics displayed:

Button Copy

Copy statistics displayed and paste them on a database such as Excel in order to save them.

Button Export

The statistics will be exported in a HTML format.

Button Print

Print your statistics

Workload

You can have the workload of resources on the time period selected.

It is calculated in function of the “slots” of the resource defined on the tab “Slots” in the resource card.

| Resource | W46 | Total | Workload |
|----------|-------|-------|----------|
| Julia | 25.25 | 25.25 | 92 % |
| Alicia | 23.50 | 23.50 | 67 % |
| Mel | 11.00 | 11.00 | 91 % |
| Tim | 26.25 | 26.25 | 75 % |
| Total | 86.00 | 86.00 | |

Cost

You can have the total cost of your resource that is calculated in function of the cost per hour you specified from the resource card.

Billing

You can have the total cost of your events billing. The amount is calculated in function of the amount on the tab “Billing” of the event window, if activated.

The 'Event' window has three tabs: General, Parameters, and Billing. The Billing tab is active, showing the following fields:

- Estimate: [Empty text box]
- Order form: [Empty text box]
- Bill: [Empty text box]
- Billing type: [Package] (dropdown menu)
- Unit price: [0] (text box)
- Amount: [150] (text box)
- ☐ Paid

Excel Pivot Table

A powerful feature of our planning software PlanningPME is the possibility to make reports via Excel Pivot Tables. All the data regarding resources, clients, projects, events, unavailabilities can be exported to Excel in order to have precise reports. Pivot Table allows calculating and comparing all kinds of elements in just some clicks.

You can make many reports on the data of your schedule.

The screenshot shows an Excel PivotTable report titled "Rapport - Excel". The PivotTable is structured as follows:

| Row Labels | TASK | 09-11-20 | 10-11-20 | 11-11-20 | 12-11-20 | 13-11-20 | 16-11-20 | 17-11-20 | 18-11-20 | 19-11-20 | 20-11-20 (blank) | Grand Total |
|------------|--------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|------------------|-------------|
| Adam | Appointment | | | 1 | | | | | | | | 1 |
| | Installation | | 0.5 | | 0.5 | | | | | | | 1 |
| | Intervention | | | | | 0.14 | 1 | 1 | | 1 | | 3.14 |
| | Repair | | 0.29 | | | 0.57 | | | | | | 0.86 |
| | Training | 1 | | | | | | | | | | 1 |
| Alicia | Appointment | 0.5 | | | 0.64 | | | | | | | 1.14 |
| | Installation | | 0.11 | | | | | | | | | 0.11 |
| | Maintenance | | | 1.54 | | | 1.29 | | | | | 2.83 |
| | Training | | 0.57 | | | | | | | | | 0.57 |
| | (blank) | | | | | | | 0.14 | | | | 0.14 |
| Christian | Appointment | 0.5 | 0.5 | 0.5 | | | | | 1 | 1 | 1 | 1.5 |
| | Installation | | 0.11 | | | | | 1 | | | | 3.11 |
| | Intervention | | 0.32 | | | | | | | | | 0.32 |
| | Maintenance | | | | 1.54 | | | | | | | 1.54 |
| | Repair | 0.64 | | | | | | | | | | 0.64 |
| | Training | | | | | 1 | | | | | | 1 |
| Hugh | Appointment | | | 0.64 | | | | | | | | 0.64 |
| | Installation | | 0.11 | 1 | 0.5 | 0.5 | 1 | | | | | 3.11 |

The PivotTable Fields task pane on the right shows the following configuration:

- Choose fields to add to report:
 - ☒ Date
 - ☐ Week
 - ☐ Month
 - ☐ YEAR
 - ☒ TASK
 - ☐ UNAVAILABILITY
 - ☐ Type
 - ☐ Category
 - ☒ Resource
 - ☐ RESOURCE_TYPE
 - ☐ Client
- Drag fields between areas below:
 - FILTERS:** Department (dropdown)
 - COLUMNS:** Date (dropdown)
 - ROWS:** Resource (dropdown), TASK (dropdown)
 - VALUES:** Sum of Days (dropdown)
- ☐ Defer Layout Update
- UPDATE

Moreover, once your templates created (reports on resources, clients, days off...), it will be possible to **update** them easily selecting the dates only.

Create a new Excel report

From PlanningPME, go to the menu "Tools" -> "Pivot Table".

The following window appears:

PivotTable

☒ New report ☐ Existing report

Beginning date : 03-Nov-20 ☐ Department ☐ Availabilities

End date : 20-Nov-20

Data

- Comments
- COST
- Day
- Email
- EXTRA_HOURS
- HOURLY_COST
- Hours
- HOURS_DAY
- HOURS_NIGHT
- ID number
- Month
- Number
- NUMBER_CLIENT
- Project
- PUBLIC_DAYS
- RESOURCE_TYPE
- State
- SUBPROJECT

To analyse

Days

Lines

Resource
TASK

Columns

Date

Filters

Department

Different steps and options to create your reports:

New /Existing report

Create a new report or start from an existing report

Beginning Date and End date

Enter the beginning and ending dates of the period to analyse

Box Department

Tick on this box when a resource is part of several departments and you make reports by department.

Data

All the data you can make reports on

To analyse

Which data do you want to analyse? hours, days...

Lines

Which information must appear on the lines of your spreadsheet?

Columns

Which information must appear on the columns of your spreadsheet?

Filters

To have a filter on the Excel report.

Button Advanced

To select additional fields you would like to have on your Excel reports.

Button Excel

Press this button to generate your report

Save your report as an Excel Workbook

Once your report created, do not forget to save it as an Excel format. Indeed, otherwise, it will be saved as a txt file!

Build templates and Update your Excel reports easily

Do you know that you can save up to 10 templates in PlanningPME?

Indeed, once your different templates created, you will just need to update them regularly selecting the dates in Pivot Table interface of PlanningPME.

Save your templates

Just save them clicking on the arrow here:

PivotTable ×

☐ New report
 ☒ Existing report

Beginning date : ☐ Department ☐ Availabilities

End date :

Update your reports

After having defined the type of reports you wish to have, you can now update your reports regularly selecting the dates. Select "Existing report".

Then, select the template you wish to use on the drop down list.

PivotTable ×

☐ New report
 ☒ Existing report

P:\Planning\Nomber-hours-customers.xls
 Begin P:\Planning\Nomber-hours-worked.xls

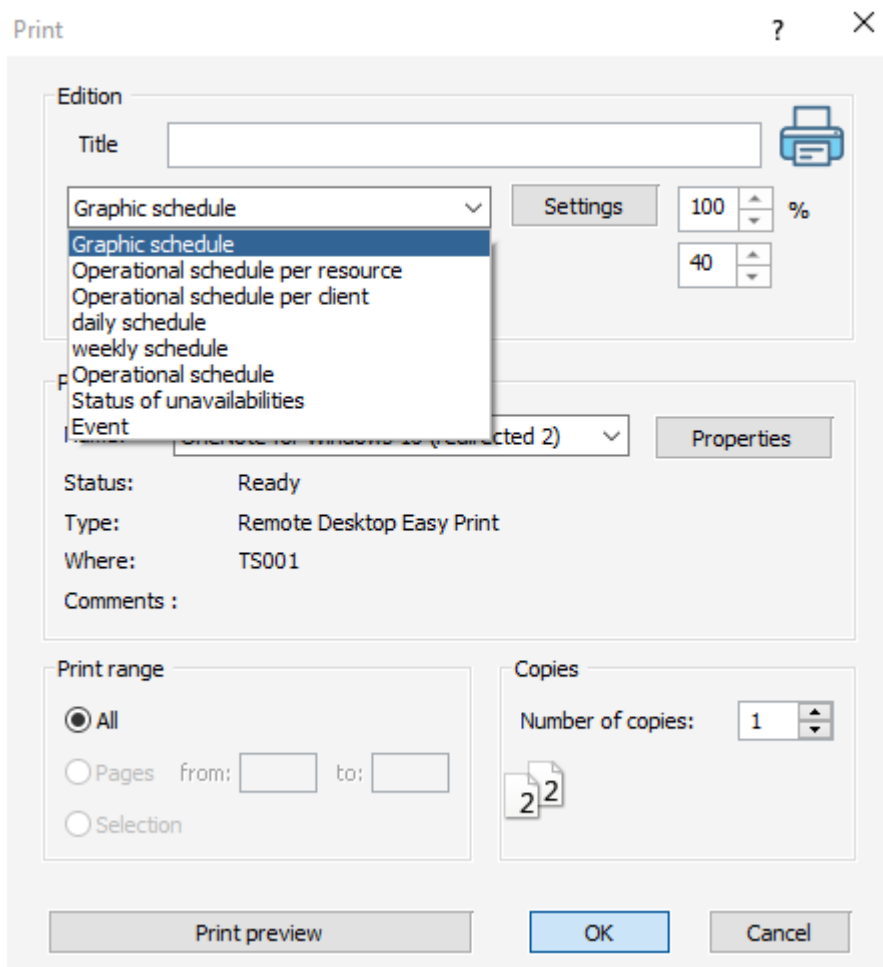
Then, select the Beginning and End dates for your reports and press "Excel".

Remove a template

Select your template and click on the "Cross" icon to remove the report from the list.

Print Options

From the menu File -> Print, you have the possibility to print different views of the planning:



- Graphic schedule
- Operational schedule per resource
- Operational schedule per client
- Daily schedule
- Weekly schedule
- Operational schedule
- Status of unavailabilities
- Print an event

We are going to give you an overview of all the different options.

Settings before printing

Fields to print

To select the fields you would like to print, click on “Settings.”

Then, you select the data to print from here:

Description

Destination Printing

Available fields

Address Client

Category

City Client

Client Mobile

Comments

Contact First Name

Contact Name

Country Client

Duration

Duration achieved:

Floor

Mobile resource

Name of division

NumberClient

Order form

Percentage

Add

Delete

Selected fields

Client

Address

City

Move up

Move down

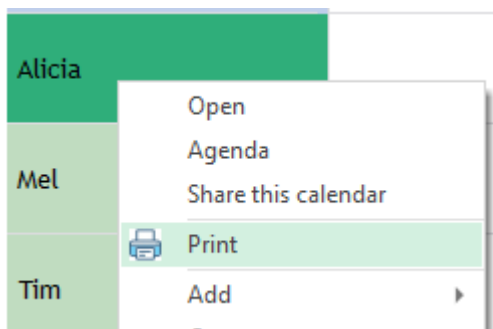
Time Period to print

Note that the time period printed is the one you see on your screen. If you display one week, one week will be printed. If you display one month on your screen, one month will be printed.

Resources printed: one department or one resource

-> If you want to print the planning of one department, filter first the planning by department.

-> If you want to print the planning of one single resource, right click directly on the resource on the screen and select Print.



Filters

You can first filter the planning by client or project for example. Then, only information related to the planning filtered will be printed.

Title

You can give a title to the document printed if needed.

Print percentage

You can reduce the size of the text printed in order to print more information.

Menu File -> Print Configuration

From the menu File -> Print configuration, you have those parameters available: Printer, Page Size, Orientation.

Print Setup

Printer

Name: Properties...

Status: Ready

Type: Microsoft Print To PDF

Where: PORTPROMPT:

Comment:

Paper

Size:

Source:

Orientation

☒ Portrait

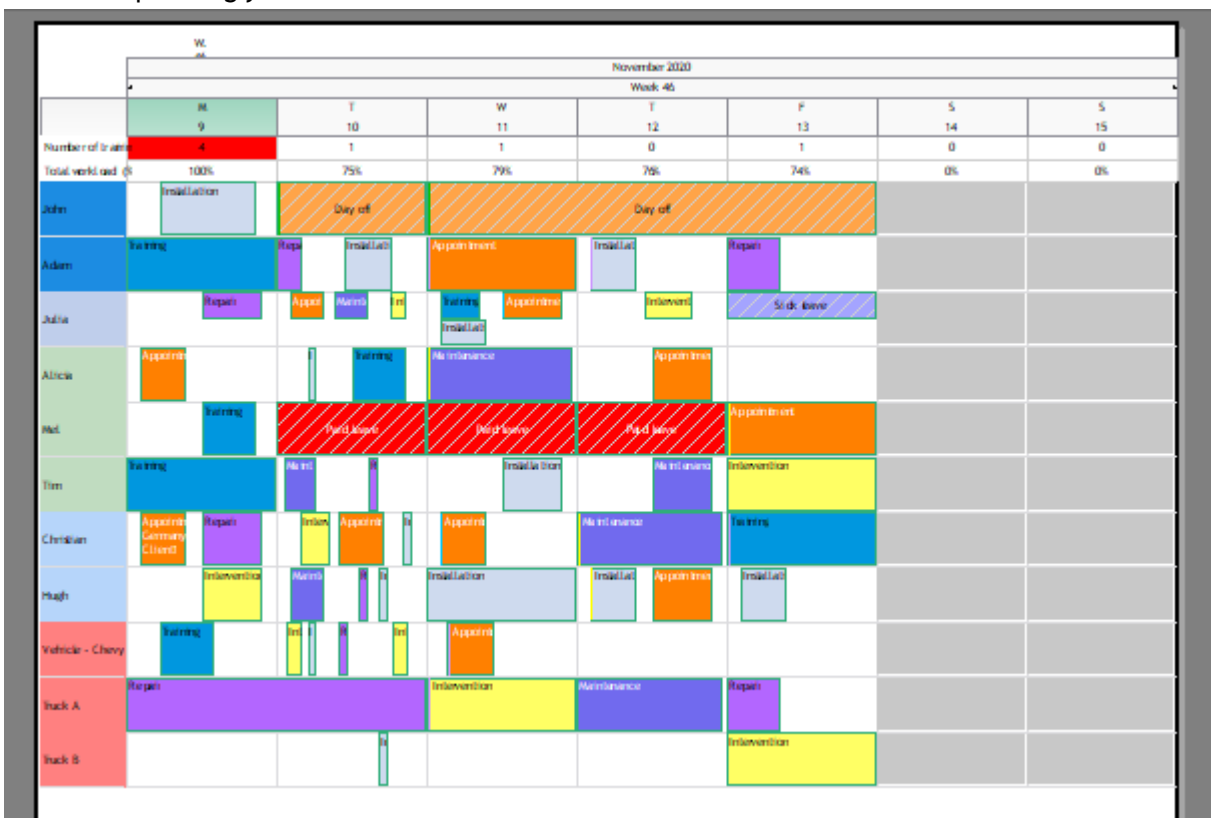
☐ Landscape

Help Network... OK Cancel

Overview of all the prints available

Graphic schedule

This is the planning you see on the screen.



Operational schedule per resource

It is the operational schedule per resource on the period that appears on your screen. Fields printed are those chosen from the settings.

| Adam | | | | |
|------------|--------------|---------------|-------------|--|
| Date | Task | Client | Hour | |
| 09/11/2020 | Training | Target Skills | 09H00-18H00 | |
| 10/11/2020 | Repair | Target Skills | 08H00-10H00 | |
| 10/11/2020 | Installation | PPMENL | 13H00-16H30 | |
| 11/11/2020 | Appointment | Target Skills | 09H00-18H00 | |
| 12/11/2020 | Installation | | 09H00-12H30 | |
| 13/11/2020 | Repair | | 08H00-12H00 | |

NB: We remind you that to print only one resource, you can right click on the resource name and select "Print".

Operational schedule per client

It is the operational schedule per client on the period selected on your screen.

| Target Skills | | | | | |
|---------------|--------------|---------------|-------------|-----------|-----|
| Date | Task | Client | Hour | Resources | Cor |
| 02/09/2020 | Installation | Target Skills | 09H00-18H00 | To Plan | |
| 10/11/2020 | Repair | Target Skills | 08H00-10H00 | Adam | |
| 11/11/2020 | Appointment | Target Skills | 09H00-18H00 | Adam | |
| 16/11/2020 | Maintenance | Target Skills | 09H00-18H00 | | |

If you wish to print the schedule of a single client, select it first on the client drop down menu.

Client

Unavailability

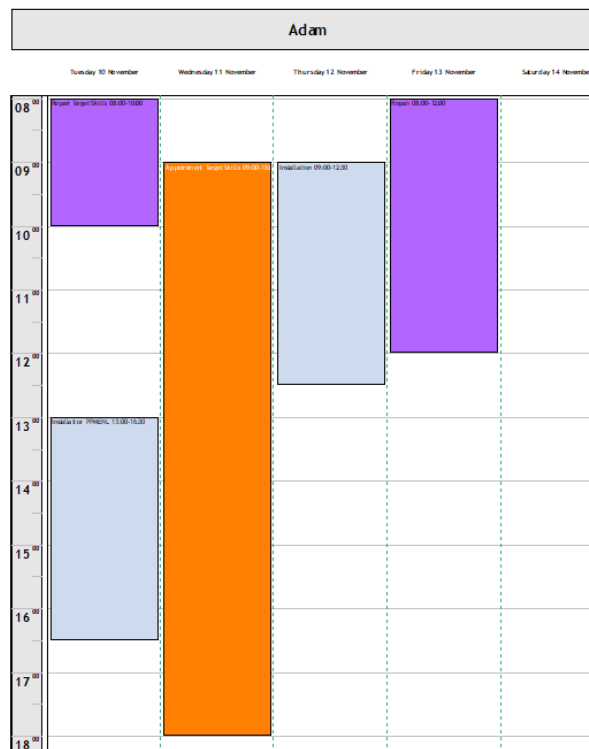
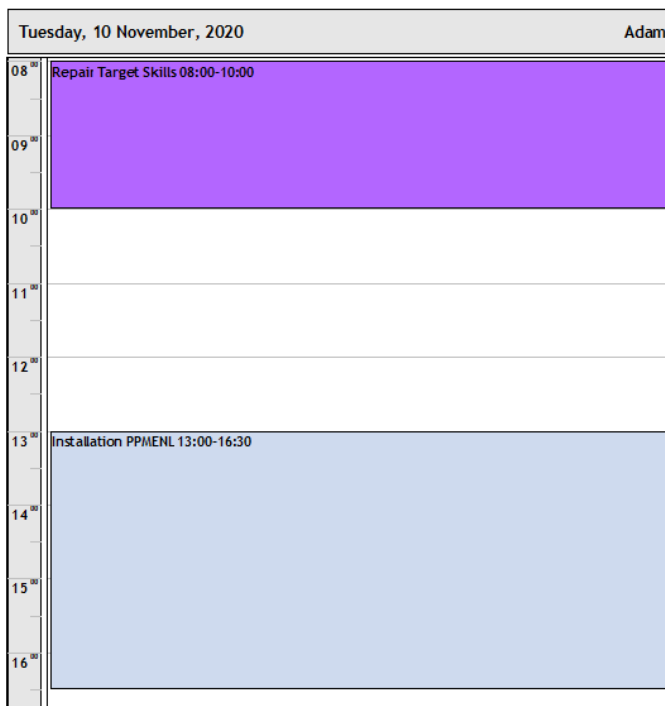
Search...

☐ Select all ☐ Empty

☒ PPMENL ☒ Target Skills

Daily and weekly schedule

The print will look like that with the hours on the left size.



Operational schedule

It is the chronological schedule for all resources on the period that appears on your screen. Here is an example:

| Date | Resource | Task | Client | Hour |
|-----------------------|-----------------|--------------|---------------|-------------|
| 09/11/2020-10/11/2020 | Truck A | Repair | | 09H00-18H00 |
| 10/11/2020 | Adam | Repair | Target Skills | 08H00-10H00 |
| 10/11/2020 | Tim | Maintenance | | 08H30-11H00 |
| 10/11/2020 | Vehicle - Chevy | Intervention | | 08H45-10H00 |
| 10/11/2020 | Hugh | Maintenance | | 09H00-11H30 |
| 10/11/2020 | Julia | Appointment | | 09H00-11H30 |
| 10/11/2020 | Christian | Intervention | | 09H45-12H00 |
| 10/11/2020 | Alida | Installation | | 10H15-11H00 |
| 10/11/2020 | Vehicle - Chevy | Installation | | 10H15-11H00 |
| 10/11/2020 | Julia | Maintenance | | 12H15-14H45 |
| 10/11/2020 | Vehicle - Chevy | Repair | | 12H30-13H15 |
| 10/11/2020 | Christian | Appointment | | 12H30-16H00 |
| 10/11/2020 | Adam | Installation | PP MENL | 13H00-16H30 |
| 10/11/2020 | Alida | Training | | 13H30-17H30 |
| 10/11/2020 | Hugh | Repair | | 14H00-14H45 |
| 10/11/2020 | Tim | Repair | | 14H45-15H30 |
| 10/11/2020 | Truck B | Installation | | 15H30-16H15 |
| 10/11/2020 | Hugh | Installation | | 15H30-16H15 |
| 10/11/2020 | Julia | Intervention | | 16H15-17H30 |
| 10/11/2020 | Vehicle - Chevy | Intervention | | 16H30-17H45 |
| 10/11/2020 | Christian | Installation | | 17H15-18H00 |
| 11/11/2020 | Adam | Appointment | Target Skills | 09H00-18H00 |
| 11/11/2020 | Truck A | Intervention | | 09H00-18H00 |
| 11/11/2020 | Hueh | Installation | | 09H00-18H00 |

The schedule of all your resources is grouped in one schedule in a chronological order.

NB: If you have a lot of events to print, it is possible to print the schedule on several pages. To do so, go to the menu Tools -> Option -> Advanced and select the number of lines per

page. A line represents the details of an event. The number of lines per page depends on your screen resolution and the quantity of comments.

Status of unavailabilities

It is a resume of your resources days off and unavailabilities.

| Resource | Compensatory leave | Day off | Paid leave | Sick leave |
|----------|--------------------|---------|------------|------------|
| John | 0.00 | 4.00 | 0.00 | 0.00 |
| Adam | 0.00 | 0.00 | 0.00 | 0.00 |
| Julia | 0.00 | 0.00 | 0.00 | 1.00 |
| Alicia | 0.00 | 0.00 | 0.00 | 0.00 |
| Mel | 0.00 | 0.00 | 3.00 | 0.00 |

You know at any time how many days your employees have been off and how many days off they still have for one year.

Print an event

Standard print

You have the possibility to print information on an event from PlanningPME.
Select an event on the schedule and then, right click and select "Print".

Task: Appointment

Beginning: 11/11/2020
End: 11/11/2020

Resource: Adam

Client: Target Skills
1-3 Rue Marcel Carné
91000 EVRY

Comments:

The fields printed by default are the following: Name of the event, Beginning and ending dates and hours, Resource Name, Client Name and Address, Project Name, Comments.

Customised event print

Via a specific development, it is possible to print a customized mission sheet by event!

You just need to send us your template with the fields you want to display (with additional fields created eventually). Contact us for more information.

The prices depend on your template and fields to synchronize.

Notify your employees

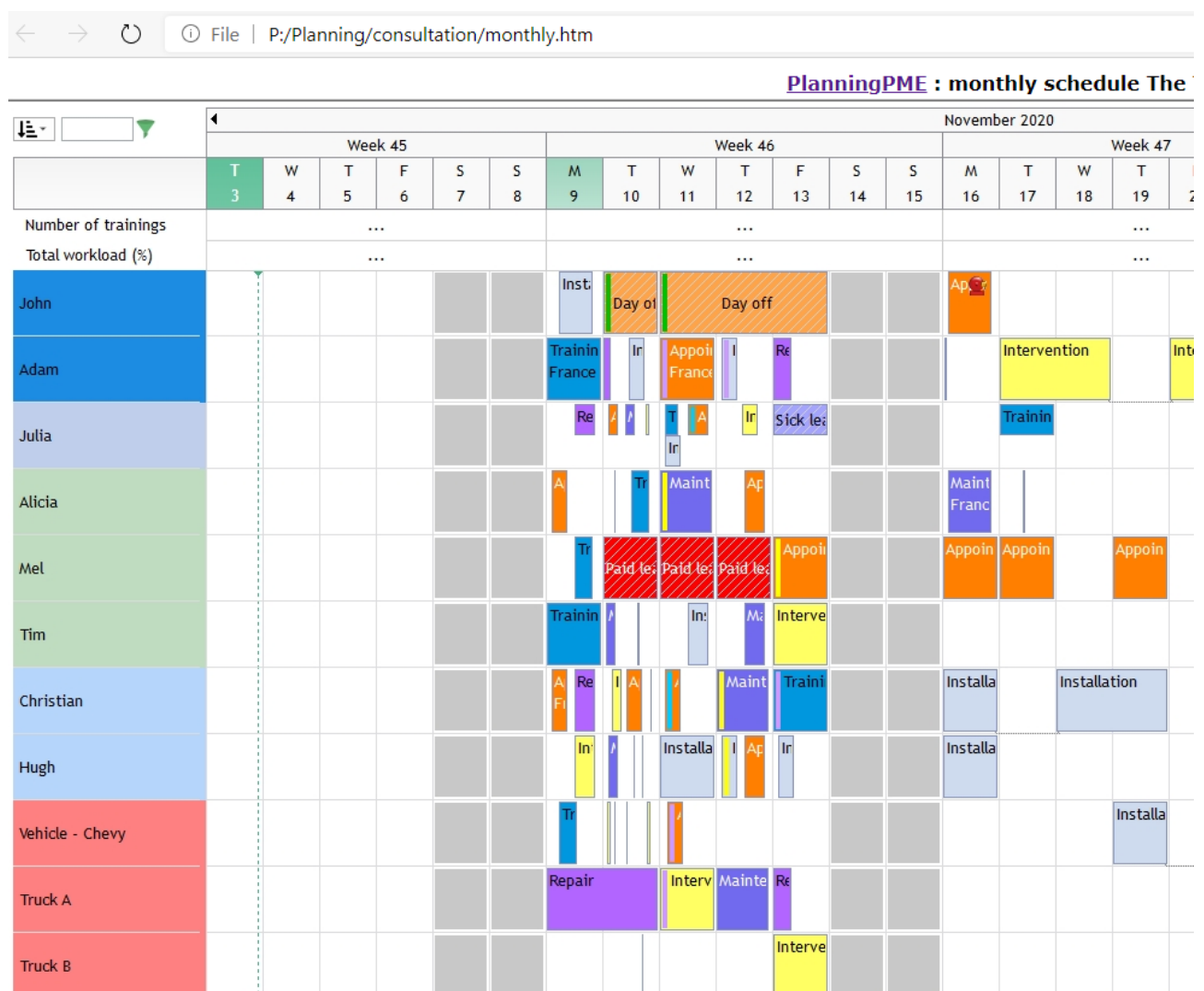
Visualisation to HTML pages

Regularly, you can send your schedule on your local network or on the Web under HTML pages in order all the employees to **visualize** the daily, weekly schedule.

Careful: You cannot make any changes from the Web on the schedule.


Definition

You can generate HYTML pages of the planning for visualisation.



Double clicking on one of the events, its details appear:

File | P:/Planning/consultation/T14.htm

 Label

Beginning -

End -

Client

Comments

Resource

Careful: Only resources that appear on your screen are synchronized.

If you want all your resources (including resources that does not appear on your screen) to be synchronized (creation of several HTML pages), we suggest you to choose the solution PlanningPME HTML or PlanningPME Web Access.

Set up

From PlanningPME, go to the menu "File" -> "HTML visualisation"

HTML Visualisation


☐ Daily
☐ Weekly
☐ Several days
☒ Monthly
☐ Quarterly

Width : Height
Directory :

Transfer on the web (reserved for clients with a support contract)

Login Password

☐ Copy on www.planningpme.com
www.planningpme.com/monthly.htm



☐ Synchronize on start
☐ Synchronize on exit

Instructions to generate your schedule on HTML pages:

Select the views

Select the views you want to synchronize. As an example, selecting weekly, the weekly schedule as you can see it on your screen from the first day of the week will be sent on HTML pages on the folder chosen.

Directory

Indicate the folder where you want your HTML pages to be created. To do so, click on the arrow under “Directory”.

Size

Select the width and the height of the pages generated (it can not be superior to your screen resolution)

Generate

You can synchronize « on start » or « on exit » of PlanningPME or simply clicking on the button « Generate ».

Send an email

It is possible to send an email to inform the resource and/or the client of a new event.

From PlanningPME, go to the menu « Tools » -> « Options ». Choose the tab "Outlook". The following window appears.

Options

Timetables | Display | Data | Event | Outlook | User | advanced

Mailing box

Email : ☐ SMTP ☒ Outlook ☐ Send an invitation

Fields

Subject

Body

Copy:

Mobile

Sent to ☒ Resource ☐ Client ☐ Both

☐ Display the message before sending it

☐ Attach the mission sheet

SMTP Configuration

Server SMTP: Specify the address of your server

E-mail Address: Specify the email of the sender

Name: Specify the name of the sender

Copy: Each time you send an email, a copy will be sent to the address mentioned here. New: You can add several persons in copy of each email sent adding a comma “;” between each email address.

Mobile: Phone operator. Enter the suffix of the email address of the mobile. Depending on your phone operator, this option will be available or not.

Precise if you want to send an email to the resource(s) assigned to the event, to the client or to both of them (Resource + client)

Outlook Configuration

If you select Outlook you have more functions while sending an email. You can select the fields on the subject of the email, on the body etc...

Select the subject of the email sent

You can select the fields you want to have while sending the email like Client Name + Project name or whatever from the button “Subject”

Select fields on the email sent

You can also select the fields you want to have while sending an email from the button “Body”.

Display the message before sending it

It is possible to display the email and add any information or text you want before sending the email.

Attach the mission sheet

It is possible to attach a customized mission sheet while sending an email.

This mission sheet is the one you specified from Tools -> Options -> Mission Sheet.

To have your own customized mission sheet, we invite you to contact Target Skills to discuss your requirements and have an estimate.



Send an email


Fill in the email address of your resources and clients to have the option activated: **envelop icon**

Event ✕

General | Parameters | Billing | Place |

Task: Appointment 100 %

Client: Target Skills  

Resource: ☒ Only one ☐ Several Adam 

On the "Event" window, click on the envelop icon to send an instant message to all resources assigned to the event, to the client or both depending on the options previously selected.



Send an Outlook invitation


From PlanningPME, you now have the possibility to send an Outlook invitation while creating a new event just clicking on the icon below:

Event ✕


General | Parameters | Billing |


Task: Installation 100 %

Client: PPMENL  

Resource: ☒ Only one ☐ Several John 

You can activate this option from Tools -> Options > Outlook.

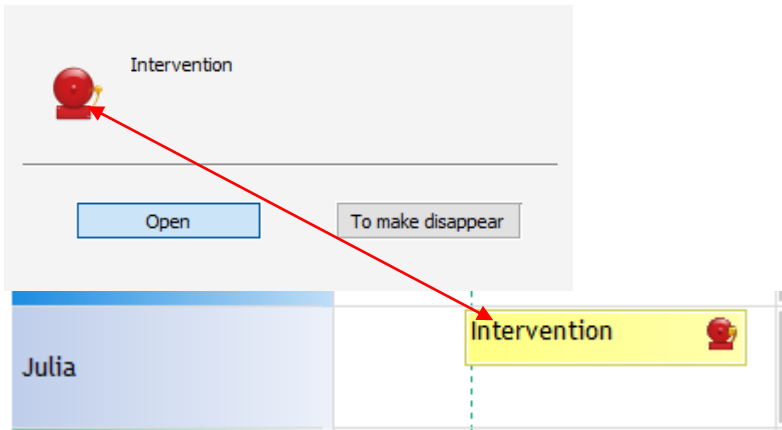
Mailing box 

E-Mail: ☐ SMTP ☒ Outlook ☐ Send an invitation 

Visual alarm

You have the possibility to use a visual alarm which will remind you an event before its beginning: 5 minutes, 10 minutes, one hour before... or at a precise date and time.

Reminder : 06/11/2020



Activation of a reminder before the beginning of an event

Tick on the box "Reminder" and choose the time for the reminder.

If you enter the planning with user rights, the reminder will be activated on the session of this user only. The other users will not see the reminder.

Event

General Parameters Billing

Task: Installation 100 %

Client: PPMENV

Resource: Only one Several John

Beginning: 09/11/2020 10:30 All day

End: 09/11/2020 17:30 Morning Afternoon

Duration: 7.00 (h) 1.000 day(s)

0 characters

0 minute

5 minutes

10 minutes

15 minutes

30 minutes

1 hour

2 hours

3 hours

4 hours

5 hours

6 hours

7 hours

8 hours

9 hours

10 hours

11 hours

0,5 day

1 day

2 days

3 days

4 days

5 days

6 days

1 week

2 weeks

3 weeks

1 month

Reminder: ☒

History...

OK Cancel

Activation of a reminder specifying a date and a time

To activate this kind of reminder, select the option on the menu Tools -> Options -> Event
Select “Event reminder using a date”.

Then, while creating an event on the planning board, you now have a calendar:

Event ✕

General | Parameters | Billing



Task

Installation

100 %

Client :


PPMENL

Resource :


☒ Only one ☐ Several


John




Beginning :

Installation


09/11/2020 


10:30 

☐ All day

 Recurrence


End

☒ 09/11/2020 

17:30 


Morning Afternoon


Duration

☐ 7.00  (H)

1.000 day(s)

0 characters

14:30 

06/11/2020 

☒ Reminder :

Events notifications

Be informed at a glance of the last changes on your planning via badges or notifications on the toolbars

What is a notification?

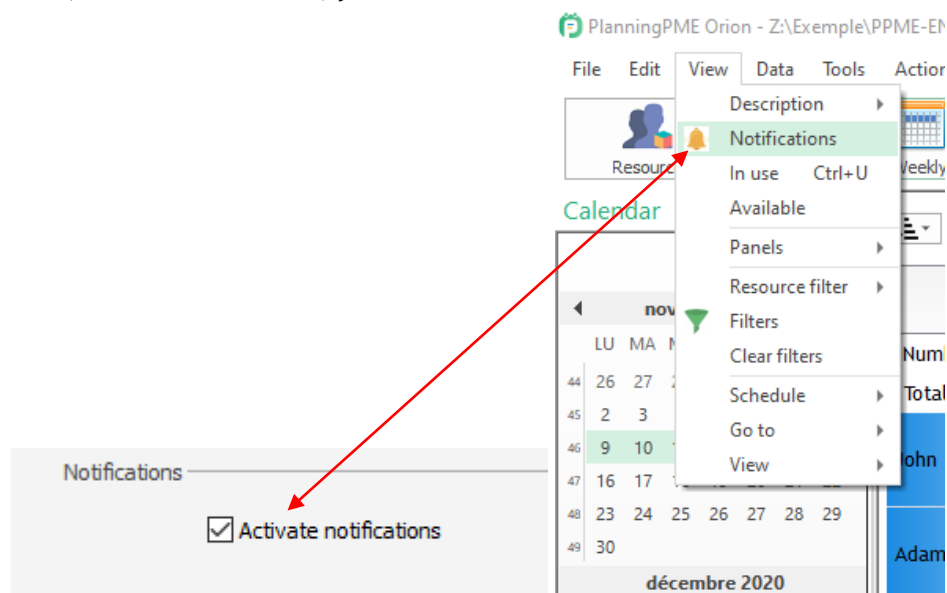
A notification informs users of new or modified events and/or unavailabilities that are related to the planning activity.

The notifications can be defined per user and you can have relevant information on events and/or unavailabilities changes for one or several resources.

Notifications can be activated in PlanningPME as red badges on the planning board and / or notifications on your bottom toolbars.

Activate notifications

First, activate the option from the menu Tools -> Options -> Event and select "Activate notifications". Then, on the menu "View", you will now see the menu "Notifications".



Then, each user will do the settings of his own notifications: when connecting to his session (users rights must be activated in the software), he can decide whether he wants to be informed of additions and/or modifications of the events allocated to the different resources listed.

Notifications
✕

☒ Activate notifications
●
☒ Badges
⚠
☐ Notification window
✉
☐ Email

☒ Send the notifications in real time

| RESOURCE | CREATION TASK | MODIFICATION TASK | CREATION UNAVAILA... | MODIFICATION UNAV... | DELAY |
|-----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| John | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Adam | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Julia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Alicia | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Mel | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Tim | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Christian | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hugh | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Filter

Drag a column header here to group by that column.







| RESOU... | OPERATION | TYPE | LABEL | BEGINNING | END | PERIO... | USER |
|-----------------------------|-----------|------|-------|-----------|-----|----------|------|
| There are no items to show. | | | | | | | |

?
OK
Cancel

Visualisation of the notifications on the planning

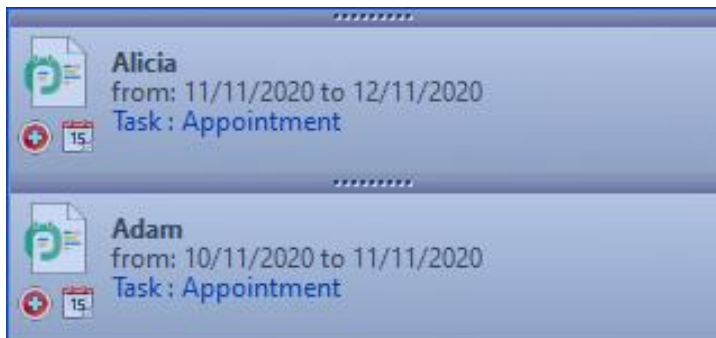
When a user logs in to the planning board, red buttons indicate which events (events or unavailabilities) were created or modified on the scheduler.

Notification of the type "Badges"

| | | | | |
|--|---|---|--------------|--|
|  <input type="text"/> |  | | | |
| | M 9 | T 10 | W 11 | |
| Number of trainings | 4 | 1 | 1 | |
| Total workload (%) | 100% | 75% | 86% | |
| John | Installation PPMEN  | Day off | | |
| Adam | Training France Target Skills  | Repa | Installation | Appointment France Target Skills  |
| | | Appointment  | | |

The icon with a "+" symbolises a new event.

Notification of the type "Windows notification"



List of notifications

You also have a listing of all your notifications from the menu View -> Notifications:

Notifications

☒ Activate notifications
 ☒ Badges
 ☒ Notification window
 ☐ Email

☒ Send the notifications in real time

| RESOURCE | CREATION TASK | MODIFICATION TASK | CREATION UNAVAILA... | MODIFICATION UNAV... | DELAY |
|-----------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| John | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Adam | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Julia | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Alicia | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Mel | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Tim | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Christian | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| Hugh | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |

Filter

Drag a column header here to group by that column.

| RESOU... | OPERATION | TYPE | LABEL | BEGINNING | END | PERIO... | USER |
|----------|-----------|------|-------------|------------------|------------------|----------|-------|
| Adam | Creation | Task | Appointment | 10/11/2020 00:00 | 11/11/2020 00:00 | No | user1 |

Remove the notifications icons

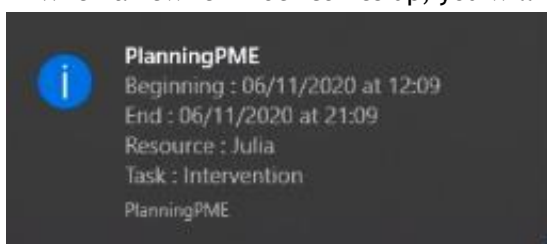
If you want to remove the notifications icons, you just need to open the event or the unavailability. You can also deselect the option "Activate notifications" from the menu View -> Notifications.

Other notifications

Events notifications when the application runs on the background

On the new version, when PlanningPME is not the main working window opened, instead of opening PlanningPME as the first window, you now have some notifications.

-> When a new reminder comes up, you will have this notification on your screen:



Administrate your users and your data

Users rights

With a login and a password, each user or users groups will have specific access to the schedule (Modify, Delete, Visualize...)

There are two steps to create users rights:

- Groups creation with specific rights
- Users assignment in each group

Vocabulary used

For each field of the software, you will have one or several boxes to select depending on the authorized level of access. The different situations are as follows:

1st situation: You have only one box to select

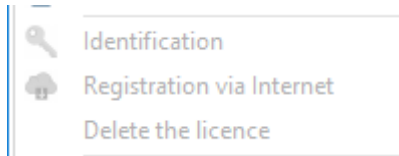
You give access to this field or not.

Example:

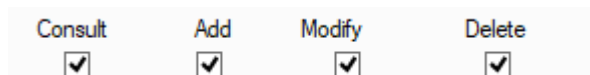
Right not accessible: ☐ Registration of the licences

Corresponding menu in the software: Data

The user does not have access to the user rights: fields are greyed out



2nd situation:



For each data (department, resource...), you can choose the following rights:

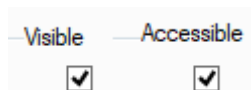
Consult: Reading access to the data concerned

Add: Addition of a new data (new department, new resource...)

Modify: Modification of the information on a data

Delete: Right to delete a data

3rd situation:



Visible: The fields entered can be read or not

Accessible: The different fields can be modified or not

Example: The different possibilities for the field "Label" are:

Visible and Accessible: Full rights

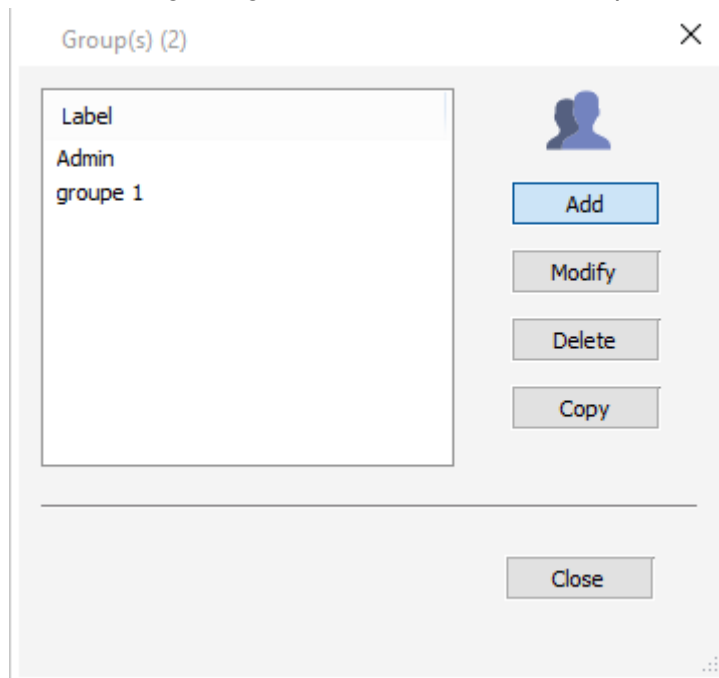
Phone :

Visible but not Accessible Phone : 01 69 44 00 49

Not visible and not Accessible Phone :

Groups creation with specific rights

From PlanningPME, go to the menu "Data" -> "Group".



From this menu, you can create groups with specific rights on all functions and data of the schedule. Right to create events, to visualize unavailabilities, right to print...

First, click on the button "Add" to create a new group.

In the "Group" window, several tabs appear. Let's explain rights for each tab.

Tab "General"

Group X

General | Resource | Client | Options | Event | Unavailability | Project

Internal set up

- ☒ Database
- ☒ Purge
- ☒ Registration of the licences
- ☒ Rights of users
- ☒ Category
- ☒ State
- ☒ Public holidays
- ☒ Additional fields
- ☒ Days off
- ☒ Labels and formats
- ☒ Options
- ☒ Description
- ☒ Import
- ☒ Export
- ☒ History
- ☒ Notifications
- ☒ Synchronization

Definition of the structure

| | Consult | Add | Modify | Delete |
|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Department | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Profiles | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Skill | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Teams | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Constraints | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Template | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Dimensions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Current use of the schedule

| | Consult | Add | Modify | Delete |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Indicator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Milestone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

☒ Find
☒ Statistics
☒ PivotTable

☒ Copy/Paste
☒ Printing
☒ Selection/Creation mode

☒ Force assignment
☒ Force constraint
☒ Force skill

Advanced functions

☒ Burst
☒ Divide
☒ Availability
☒ Locking
☒ Unlocking

☒ Split
☒ Shared agendas
☒ Signature

☒ Offline not allowed
Timeout (s)
Days before
Days after

View

☒ Resource
☒ Task
☒ Client
☒ Project
☒ Map
☒ Agenda
☒ List

In the rights organization, there are 4 different domains:

- Internal Set up
- Definition of the structure
- Current use of the schedule
- Advanced functions
- View

We are going to describe those 4 domains hereafter.

Internal set up

| | |
|---|--|
| <div>Internal set up</div> <ul style="list-style-type: none"> <input checked="" type="checkbox"/> Database <input checked="" type="checkbox"/> Purge <input checked="" type="checkbox"/> Registration of the licences <input checked="" type="checkbox"/> Rights of users <input checked="" type="checkbox"/> Category <input checked="" type="checkbox"/> State <input checked="" type="checkbox"/> Public holidays <input checked="" type="checkbox"/> Additional fields <input checked="" type="checkbox"/> Days off <input checked="" type="checkbox"/> Labels and formats <input checked="" type="checkbox"/> Options <input checked="" type="checkbox"/> Description <input checked="" type="checkbox"/> Import <input checked="" type="checkbox"/> Export <input checked="" type="checkbox"/> History <input checked="" type="checkbox"/> Notifications <input checked="" type="checkbox"/> Synchronization | <p>The internal set up of the software is an operation which occurs while installing the software and then, episodically.</p> <p>Those operations are done by the Administrator. It is necessary to be trained on the software to modify those parameters which impact every users.</p> <p>You can choose who can or cannot have access to the following parameters.</p> |
|---|--|

| Available fields | Corresponding fields in the software |
|------------------------------|---|
| Database | File -> New schedule + Location |
| Purge | File -> Database -> Purge |
| Registration of the licences | File -> Identification + Registration via Internet or by file |
| Rights of users | Data -> Group + User |
| Category | Data -> Event category |
| State | |
| Public holidays | Data -> Public holidays |
| Additional fields | Data -> Additional fields |
| Days Off | Tools -> Days Off |
| Labels and formats | Tools -> Labels and formats |
| Options | Tools -> Options |
| Description | View -> Description |
| Import | File -> Import |
| Export | File -> Export |
| History | Data -> Event description |
| Notifications | View -> Notifications |
| Synchronization | File -> HTML visualization |

Definition of the structure

The definition of the structure is an operation which occurs while installing and setting up the software. It is then changed occasionally, while integrating a new resource or a new department or re-structuring the society.

This structure is defined from the menu "Data".

| | |
|--------------|--------------------------|
| Users rights | Access from PlanningPME. |
|--------------|--------------------------|

Definition of the structure

| | Consult | Add | Modify | Delete |
|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Department | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Profiles | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Skill | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Teams | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Constraints | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Template | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Dimensions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

DataToolsAction?

Department
 Resource
 Time profiles
 Skill

Task
 Client
 Template
 Category

Unavailability
 Unavailability status


Group
 User
 Customised fields

Current use of the schedule

Those functions are currently used on the schedule: a user will be allowed or not to create events, to delete them, to update them.

| Current use of the schedule | | | | |
|--|--|---|-------------------------------------|-------------------------------------|
| | Consult | Add | Modify | Delete |
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Indicator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Milestone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| <input checked="" type="checkbox"/> Find | <input checked="" type="checkbox"/> Statistics | <input checked="" type="checkbox"/> PivotTable | | |
| <input checked="" type="checkbox"/> Copy/Paste | <input checked="" type="checkbox"/> Printing | <input checked="" type="checkbox"/> Selection/Creation mode | | |
| <input checked="" type="checkbox"/> Force assignment | <input checked="" type="checkbox"/> Force constraint | <input checked="" type="checkbox"/> Force skill | | |

| Available fields | Corresponding fields in the software |
|--------------------------|---|
| List of tasks | Data -> Task |
| List of unavailabilities | Data -> Unavailability |
| Event | Direct modification on the planning board |
| Unavailability | Direct modification on the planning board |
| Context | Access to the context feature |
| Indicator | Access to the indicator feature |
| Milestone | |
| Search - Find | Edit -> Search |
| Statistics | Tools -> Statistics |
| Pivot Table | Tools -> Pivot Table |

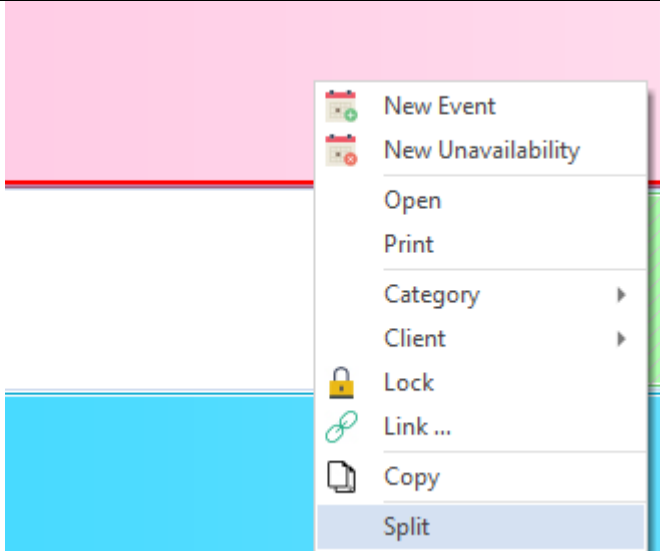
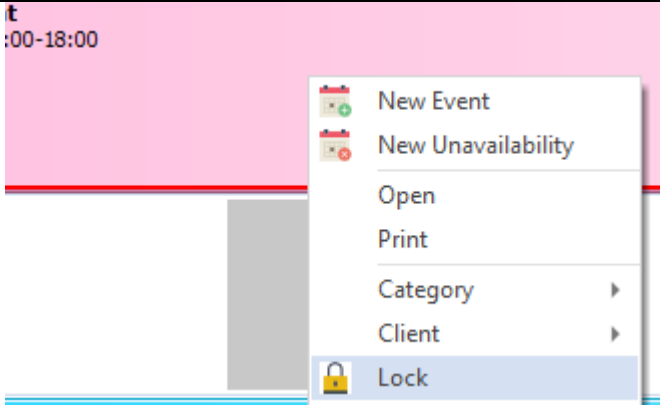
| | |
|---------------------------|---|
| Copy/Paste | Edit or right click on an event or on an unavailability -> Copy + Paste |
| Printing | File -> Print + Print preview + Print configuration |
| Selection / Creation Mode |  |
| Force Context | Force the creation even if a resource is already busy |
| Force constraints | Force the creation even if the constraint is not respected |
| Force Skill | Force the creation even if the resource does not have the skill |

Advanced functions of the schedule

Advanced functions

☒ Split
 ☒ To split
 ☒ Availability
 ☒ Task locking
 ☒ Task unlocking

Those functions must be used by trained users!

| Available fields | Corresponding fields in the software |
|---------------------------|--|
| Split |  |
| To Split | Edit -> To split |
| Availability | Edit -> Availability |
| Event Locking / Unlocking |  |

For each window "Client", "Resource", etc... you can specify rights of access and visibility for each tab and most of the fields of each window.

Group

General | Resource | Client | Options | Event | Unavailability | Project |

Users

Internal set up

☒ Database

☒ Purge

Definition of the structure

Department

Resource

Profiles

Skill

Tab "Resources"

Group ✕

General | Resource | Client | Options | Event | Unavailability | Project

Tab access

☒ Information
☒ Slots
☒ Unavailabilities
☒ Skills
☒ History
☒ Shared agenda

Access to fields

☒ Human resource
☒ Human resource 1
☒ Human resource 2
☒ Human resource 3
☒ Material resource
☒ Material resource 1
☒ Material resource 2
☒ Material resource 3

☒ To sort

Tab Information

| | Visible | Accessible |
|------------------|-------------------------------------|-------------------------------------|
| Type | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Label | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Colors | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Department | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Hourly Cost | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| First Name | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| ID number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Address | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Postal Code | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| City | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Country | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Phone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Mobile | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Email | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Manager | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Do not display | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Fixed / Floating | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

OK Cancel

Each resource has a personal card. For each information, users rights can be assigned.

Access to the tabs: the tabs of the card are accessible or not

Tab Information: For each fields of this tab, it is possible to give a right to visualize and a right to modify. "Human resource" and "Material resource" are tabs with additional fields customizable that can be created on the resource card from the menu "Data" -> "Additional fields".

Tab "Client"

Group ✕

General | Resource | Client | Options | Event | Unavailability | Project

Tabs access

☒ General

☒ History

☒ Client equipment

☒ Events

Access to fields

☒ General Tab

☒ Tab1

☒ Tab2

☒ Tab3

☒ Access to all clients

General Tab

| | Visible | Accessible |
|-------------|-------------------------------------|-------------------------------------|
| Type | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Color | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Company | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Address | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Postal Code | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| City | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Country | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Floor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Building | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Door code | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Phone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Mobile | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Fax | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Email | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Web site | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Hide | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

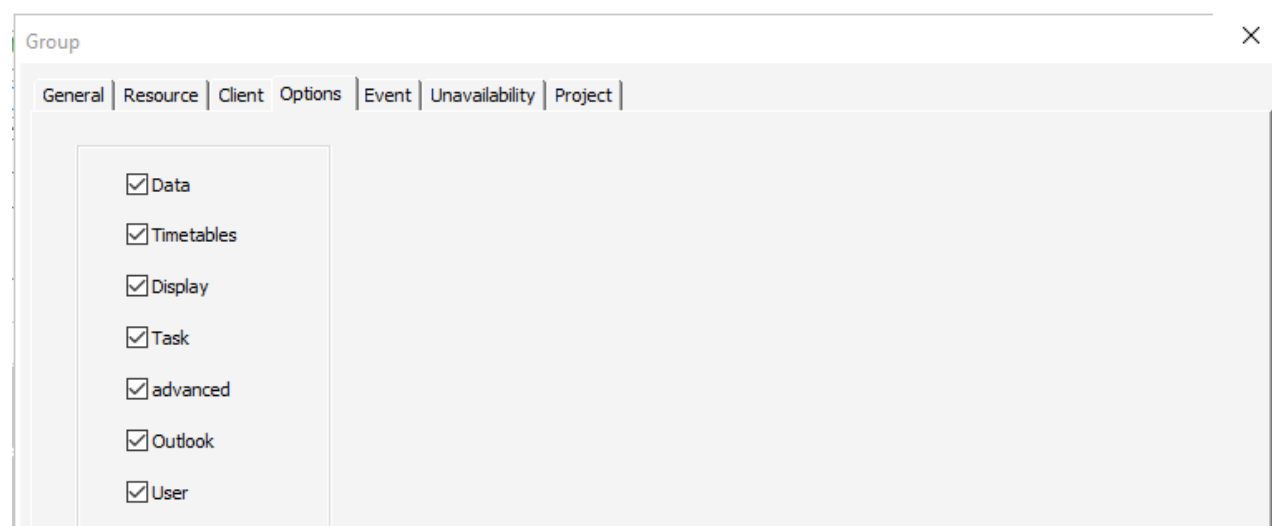
OK Cancel

Each client has a personal card. For each information, users rights can be assigned.

Access to the tabs: the tabs of the card are accessible or not

Tab "General": For each field of this tab, it will be possible to give rights of visualization and accessibility

Tab "Options"



You can give access or not to the tabs of the menu "Tools" -> "Options":

Tab "Event"

Group X

General | Resource | Client | Options | **Event** | Unavailability | Project

Tabs access
☒ General
☒ Billing
☒ Parameters
☒ Place
☒ Link

Access to fields
☒ General Tab
☒ Tab1
☒ Tab2
☒ Tab3
☒ Tab4
☒ Tab5

Description
☒ Public

Periodical Event
☒ Delete the serie

| General Tab | Visible | Accessible | Mandatory |
|----------------|-------------------------------------|-------------------------------------|--------------------------|
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Subproject | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Percentage | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Category | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Beginning date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Beginning hour | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Ending date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Ending hour | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| All day | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Slots | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Recurrence | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Duration | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Break | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Reminder | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Comments | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Equipment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Achievement | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| Achieved | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | |

OK Cancel

Tab1, Tab2 and Tab3 are tabs with additional fields customizable that can be created from the menu "Data" -> "Additional fields". The tabs "Billing", "Parameters" and "Place" appear only if they are activated on the menu "Tools" -> "Options".

Note that some fields as the event label or the project name can be mandatory to fill.

Tab "Unavailability"

Group ×

General | Resource | Client | Options | Event | Unavailability | Project

| | Visible | Accessible |
|----------------|-------------------------------------|-------------------------------------|
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Beginning date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Beginning hour | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Ending date | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Ending hour | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| All day | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Slots | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Recurrence | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Duration | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Break | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Reminder | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Comments | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Description

☒ Public

OK Cancel

For each information of the unavailability window, access rights can be assigned. For each field of this tab, it will be possible to give rights of visualization and accessibility.


Once all your groups registered with specific rights, you can create the users.

Creation of the users

From PlanningPME, go to the menu "Data" -> "Users". You can create a login and a password for each user.

User(s) (2) X

| User | Group |
|-------|----------|
| Admin | Admin |
| user1 | groupe 1 |



Add

Modify

Delete


Copy

☒ Ask the user to enter his password

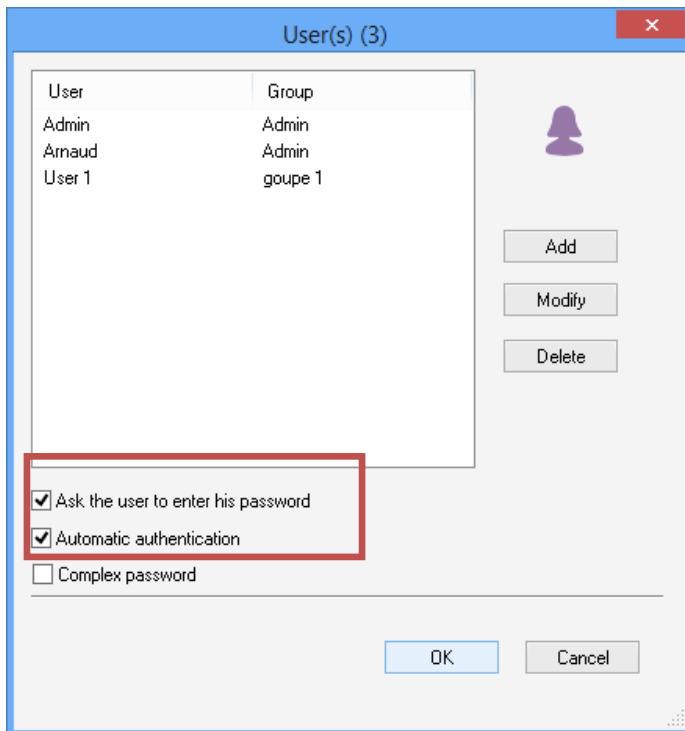
☐ Automatic authentication

☐ Complex password

OK Cancel

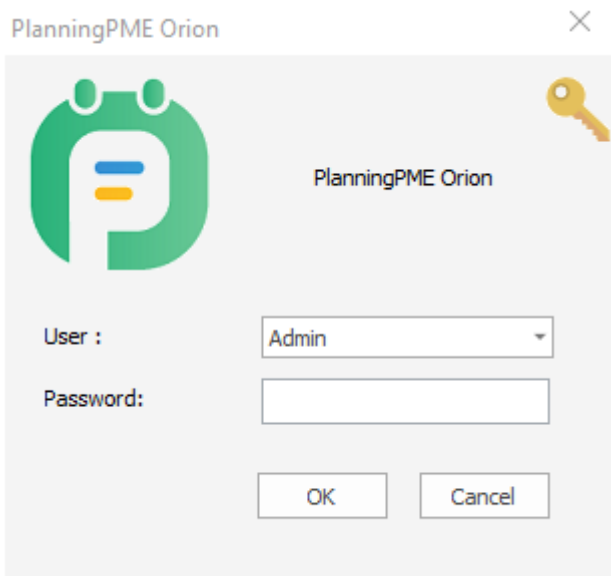
| User | |
|--|---|
| <p>Login: <input type="text" value="user1"/></p> <p>Password: <input type="password" value="...."/></p> <p>Please confirm your password: <input type="password" value="...."/></p> <p>Group: <input type="text" value="groupe 1"/></p> <p><input type="checkbox"/> Mobile access </p> <p>Reading acces</p> <p>Departments: <input type="text" value="Commercial"/></p> <p>Writing access</p> <p>Departments: <input type="text"/></p> <p>Resource: <input type="text" value="Adam"/></p> <p>Clients: <input type="text"/></p> <p>EMail: <input type="text"/></p> <p>OK Cancel</p> | <p>Enter a login</p> <p>Enter a password</p> <p>Confirm the password</p> <p>Assign a group to this user</p> <p>Mobile Access: to have this user on the mobile application</p> <p>Select the department(s) this user can visualize.</p> <p>Select the department(s) the user will have access in writing</p> <p>Select the resource that corresponds to the user if needed</p> |

You created a new user with specific rights on the schedule.



Tick on the box "Ask the user to enter his password" for users rights to be activated while opening the schedule.

Next time you open PlanningPME, a login and a password will be asked.



Depending on your rights, you will have an access limited to the schedule.

Automatic authentication

If your user name is the same as your Windows user name, you will not have to enter a password. Your rights will be automatically taken into account while opening PlanningPME.

Give access to only one resource

If you assign the user to a resource on the planning board and that you do not select anything departments for reading and writing access, then this user will see the planning of this resource only.

PlanningPME Orion - Z:\Exemple\PPME-EN.pp - Admin

File Edit View Data Tools Action ?

Resource: [User Icon] 15 Weekly All departments [Filter Icon] Resource [Skill Icon] Skill Task Category Client Unavailability [On/Off Icon]

Calendar

novembre 2020

| November 2020 | | | | |
|---------------------|--------------|---------|---------|---------|
| Week 46 | | | | |
| | M | T | W | T |
| | 9 | 10 | 11 | 12 |
| Number of trainings | 4 | 1 | 1 | 0 |
| Total workload (%) | 100% | 72% | 87% | 85% |
| John | Installation | Day off | Day off | Day off |

Select or deselect all departments

Right click at the top of your drop down list of department to save time checking on or off all boxes.

Reading access

Departments: Commercial

Writing access

Departments: [Dropdown]

Resource: [List Box]

- ☐ All departments
- ☐ Commercial
- ☐ Technical

Clients :

Email :

Access rights to clients

You can limit the planning by clients: Then, when the user opens the planning, he will not see events allocated to other clients.

From the menu Data -> User, you can now limit the list of clients per user.

User

Login:

Password:

Please confirm your password:

Group:

☐ Mobile access

Reading access

Departments:

Writing access

Departments:

Resource:

Clients :

- ☐ BITss
- ☐ BITss
- ☐ FM-I
- ☐ Societe DS
- ☐ TargetSkills
- ☐ TargetSkills Siège

NB: You will first need to create a group with a minimum condition: « Access to all clients » must be unchecked.

Group

General | Resource | Client | Options | Event | Unavailability | Project

Tabs access

- ☒ General
- ☒ History
- ☒ Client equipment
- ☒ Events

Access to fields

- ☒ General Tab
- ☒ Tab1
- ☒ Tab2
- ☒ Tab3

☒ Access to all clients

General Tab

| | Visible | Accessible |
|-------------|-------------------------------------|-------------------------------------|
| Type | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Color | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Number | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Company | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Contact | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Address | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Postal Code | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| City | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| State | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Country | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Floor | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Building | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Door code | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Phone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Mobile | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Fax | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Email | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Web site | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Hide | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Then, when the user opens the planning, he will not see events allocated to other clients.

Examples of permissions

You can create those kinds of permission for example:

- > Rights to visualize the schedule of two departments and to modify the schedule of one department
- > Rights to create unavailabilities and not events
- > Right to modify comments of the event but not the other parameters of the event.
- > Rights to visualize the details on resources.

Offline Mode

We now added a new feature that allows you to **work off-line** with your planning!

Indeed, if you are not connected with your network (disconnected from your database), you will still be able to create and modify events and unavailabilities on your schedule.

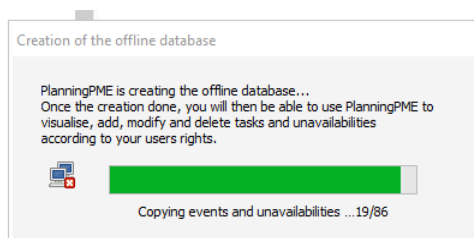
While reconnecting to your network, events and unavailabilities will be synchronised and there will be a check for conflicts, if any.

Minimum requirements

This feature is working only if you have a **SQL-Server database**. The off-line mode is not working if you have a MS Access database (pp file).

We can migrate your database from MS Access to SQL Server. Contact us to have more information.

When you are disconnected from the database, PlanningPME is creating an offline database.



Resume

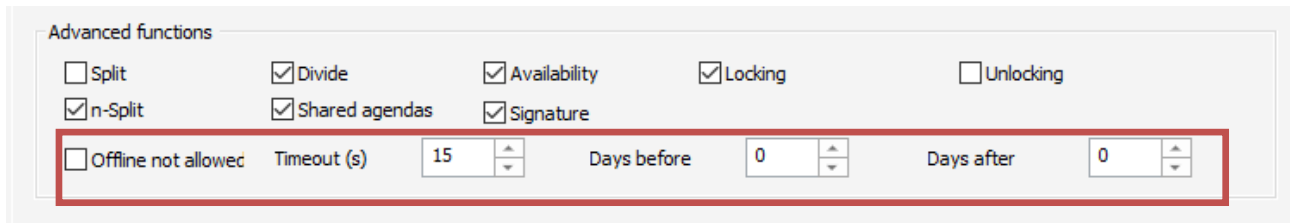
| | |
|--------------|--|
| Database | SQL Server |
| Activation | Create Groups and users |
| When Offline | |
| You can | Create events and unavailabilities |
| You can not | Create new clients, projects, resources etc... |

How to activate this feature?

Note that the Admin Group can not have access to the “Offline” mode as this feature is deactivated by default. You will then need to create a new group and some users as described below.

Menu Data -> Group

By default, this option is not activated on the users rights. So, you need to give the users permission from the menu **Data -> Group**



Advanced functions

☐ Split ☒ Divide ☒ Availability ☒ Locking ☐ Unlocking

☒ n-Split ☒ Shared agendas ☒ Signature

☐ Offline not allowed Timeout (s) 15 Days before 0 Days after 0

Deselect “Offline unauthorized”.

Timeout: Specify the frequency of the tentative of reconnection to the database when offline

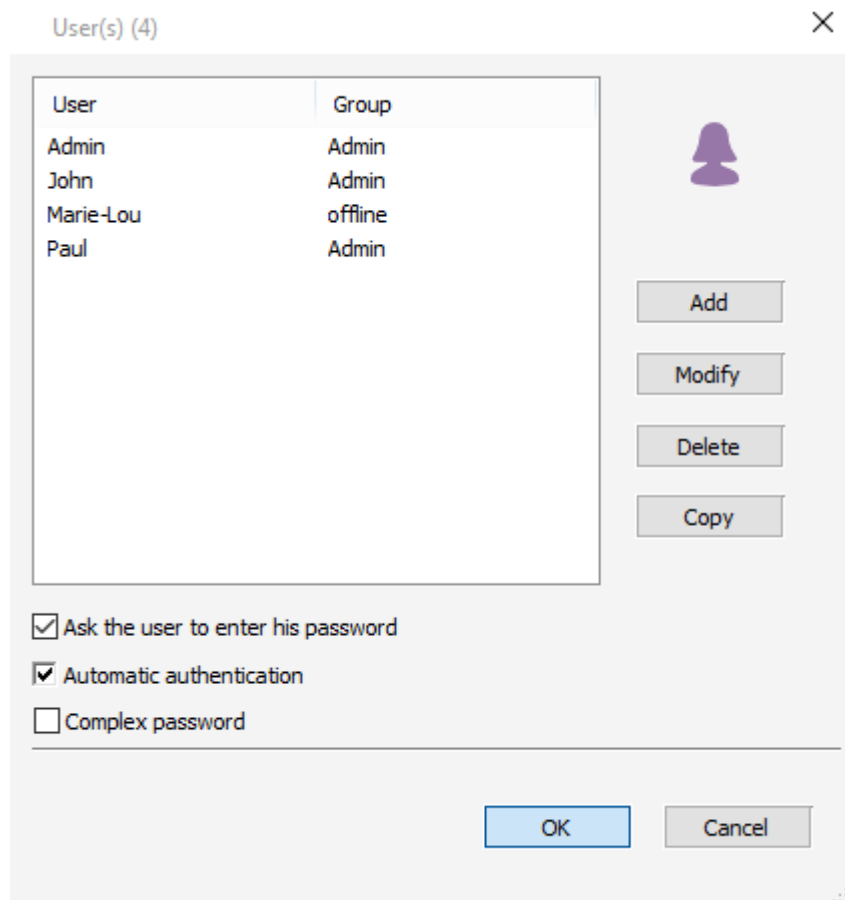
Days before / Days after: Define the period of synchronisation of events

You can synchronise a maximum period of 90 days before and after current date.

Menu Data -> User

Then, create a user part of this new group created from the menu Data -> User.

Do not forget to select the option “ask the user to enter his password”.



User(s) (4) X

| User | Group |
|-----------|---------|
| Admin | Admin |
| John | Admin |
| Marie-Lou | offline |
| Paul | Admin |

☒ Ask the user to enter his password

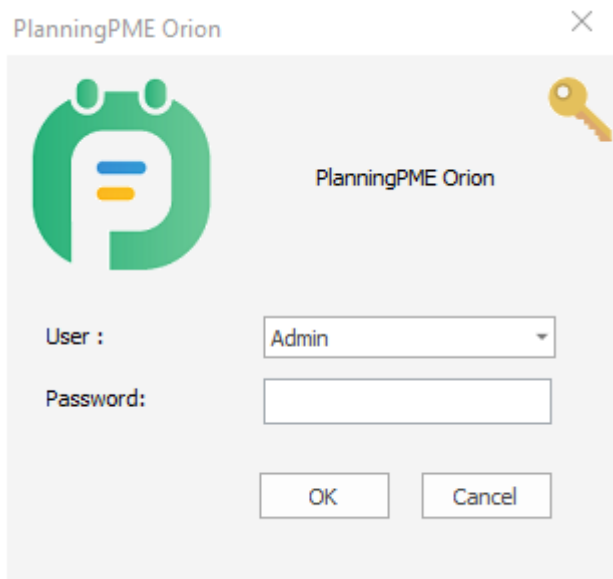
☒ Automatic authentication

☐ Complex password

Add Modify Delete Copy OK Cancel

Connect to the planning with your users rights

Then, you can open PlanningPME with your login and password:

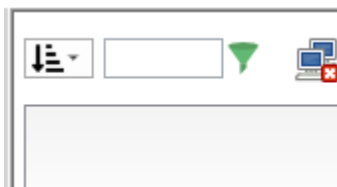


When is the offline database created?

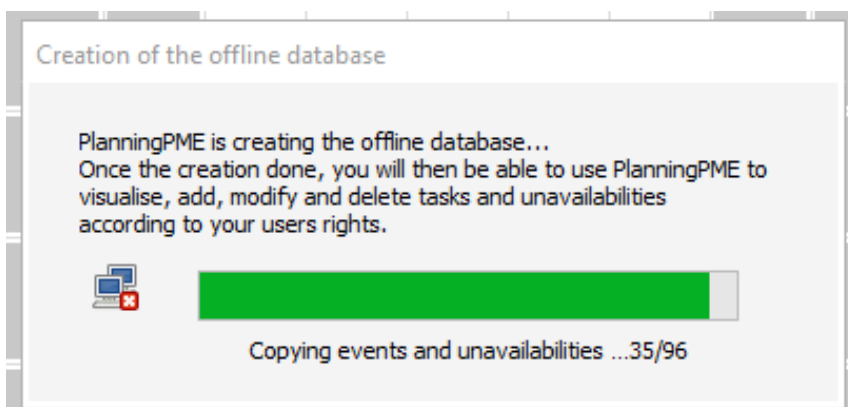
The Offline database is created when you close PlanningPME or when you are disconnected from the database.

How can I see that I am offline?

You can see that you are offline when you see this icon here:



You will also get this message as a local database is then created on your computer:



What can I create when I am offline?

-> You can:

The user can Add/Modify/Delete events and unavailabilities depending on his users rights.

-> You can not:

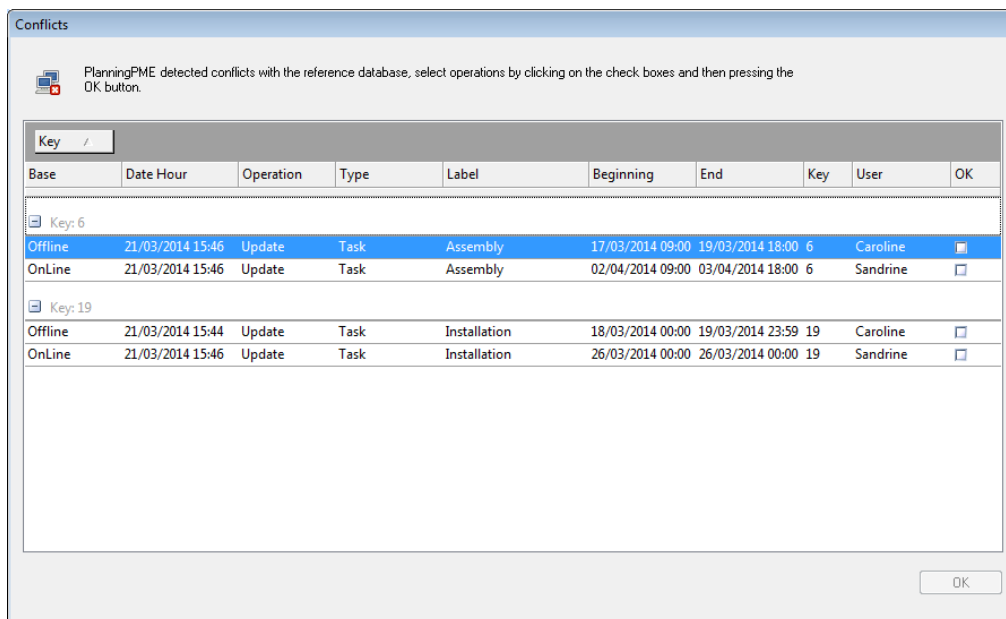
The user can not Add/Modify/Delete resources, customers and projects (Settings that are in the menu Data basically).

The user can not get an event off a recurrence.

How are conflicts handled?

If no users make modifications on the events that you changed, your modifications will be applied directly when you are back on the online planning.

If another user change the same events, then this conflicts window will open:



-> You need to solve conflicts first before being able to work again online.

You can open the events via a double click to check details. Then, you need to select which modification for this particular event should be applied.

On the print screen above, you have two conflicts: one for the event, Key 6 and another one for the event, key 19.

You first need to select which change should be applied for each event to have the button "OK" appearing:

Conflicts

PlanningPME detected conflicts with the reference database, select operations by clicking on the check boxes and then pressing the OK button.

| Key | Base | Date Hour | Operation | Type | Label | Beginning | End | Key | User | OK |
|---------|------------------|-----------|-----------|--------------|------------------|------------------|-----|----------|-------------------------------------|----|
| Key: 6 | | | | | | | | | | |
| Offline | 21/03/2014 15:46 | Update | Task | Assembly | 17/03/2014 09:00 | 19/03/2014 18:00 | 6 | Caroline | <input checked="" type="checkbox"/> | |
| OnLine | 21/03/2014 15:46 | Update | Task | Assembly | 02/04/2014 09:00 | 03/04/2014 18:00 | 6 | Sandrine | <input type="checkbox"/> | |
| Key: 19 | | | | | | | | | | |
| Offline | 21/03/2014 15:44 | Update | Task | Installation | 18/03/2014 00:00 | 19/03/2014 23:59 | 19 | Caroline | <input type="checkbox"/> | |
| OnLine | 21/03/2014 15:46 | Update | Task | Installation | 26/03/2014 00:00 | 26/03/2014 00:00 | 19 | Sandrine | <input checked="" type="checkbox"/> | |

OK

Then, your modifications will be applied.

History / Tracking

You will know who created the event and all events modifications and even deletions

Activation and creation of the new menu “History”

From the menu Tools -> Options -> Event activate the option “Save the history of events modifications”:

The screenshot shows the 'Options' dialog box with the 'Event' tab selected. The 'Display' section includes options for 'Number of resources by default' (radio buttons for 'Only one' and 'Several'), 'Display a percentage of assignment', 'Display a button Availability', 'Display a break time', 'Activate status for tasks', 'Activate categories', 'Display parameters tab', 'Display invoicing tab', 'Event reminder using a date', and 'Activate status for unavailabilities'. The 'Controls' section includes 'Assign only one event at the same time to one resource', 'Forbid the creation and the modification of events prior to the present day' (with a date picker set to 05/11/2020), 'Save the history of events modifications' (highlighted with a red box), 'Do not add new labels', and 'Ask for the duration to plan'. The 'Planned / Achieved' section includes 'Display the percentage of achievement', 'Display the duration achieved', 'Color when overdue' (with a red color picker), and 'Color when' (with a blue color picker). The 'Notifications' section includes 'Activate notifications'. The 'OK' and 'Cancel' buttons are at the bottom right.

Then, you will have a new entry “History” from the menu “Tools”.

NB: Note that this new menu can lower speed performances of PlanningPME as it records all creations, modifications and deletions within PlanningPME. We advise you to copy and then purge your data regularly.

Information available on the “History” menu

History (782) (47 ms) X

Filter

Drag a column header here to group by that column.

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END | PE... | KEY | USER | PR... | CLI... | CA... | RESOURCE | STATE |
|--------------|-----------|----------------|---------------|--------------|--------------|-------|-----|-------|-------|--------|-------|----------|------------|
| 05/11/202... | Update | Resource | Mel | | | No | 5 | Admin | | | Weak | | |
| 05/11/202... | Update | Unavailability | Day off | 11/11/202... | 13/11/202... | No | 294 | Admin | | | Weak | John | 3-Approved |
| 05/11/202... | Update | Resource | John | | | No | 1 | Admin | | | Weak | | |
| 05/11/202... | Update | Unavailability | Day off | 13/11/202... | 15/11/202... | No | 294 | Admin | | | Weak | John | 3-Approved |
| 05/11/202... | Update | Unavailability | Day off | 15/11/202... | 17/11/202... | No | 294 | Admin | | | Weak | John | 3-Approved |
| 03/11/202... | Update | Resource | Adam | | | No | 2 | Admin | | | Weak | | |
| 03/11/202... | Update | Task | Appointment | 11/11/202... | 11/11/202... | No | 14 | Admin | | Tar... | Weak | Adam | |
| 03/11/202... | Update | Client | Target Skills | | | No | 1 | Admin | | | Weak | | |
| 03/11/202... | Update | Task | Appointment | 11/11/202... | 11/11/202... | No | 14 | Admin | | Tar... | Weak | Adam | |
| 03/11/202... | Update | Task | Training | 09/11/202... | 09/11/202... | No | 18 | Admin | | Tar... | Weak | Adam | |
| 03/11/202... | Update | Task | Installation | 10/11/202... | 10/11/202... | No | 28 | Admin | | PR... | Weak | Adam | |
| 03/11/202... | Update | Task | Repair | 10/11/202... | 10/11/202... | No | 7 | Admin | | Tar... | Weak | Adam | |
| 03/11/202... | Update | Client | PPMENL | | | No | 2 | Admin | | | Weak | | |

Purge the elements before :

This window shows all creations, modifications and deletions done on an event, project, client and resources with that different information:

Date Hour: Date of the operation

Operation: Type of the operation: Creation, update or deletion

Type: Task, unavailability, resource, client, resource

Begin: Task/unavailability beginning date and time

End: Task/unavailability ending date and time

Label: Label of the task, resource, client, project or resource

Key: ID

User: User login if activated

Functions available within this new window

Filter the list easily

Type the keyword on the filter and the results will be filtered rapidly.

History (782) (47 ms)

Filter

Drag a column header here to group by that column.

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END |
|--------------|-----------|----------------|-------------|--------------|--------------|
| 05/11/202... | Update | Unavailability | Day off | 11/11/202... | 13/11/202... |
| 05/11/202... | Update | Unavailability | Day off | 13/11/202... | 15/11/202... |
| 05/11/202... | Update | Unavailability | Day off | 15/11/202... | 17/11/202... |
| 03/11/202... | Update | Task | Appointment | 11/11/202... | 11/11/202... |
| 03/11/202... | Update | Task | Appointment | 11/11/202... | 11/11/202... |
| 03/11/202... | Update | Task | Appointment | 16/11/202... | 16/11/202... |
| 03/11/202... | Update | Task | Appointment | 11/11/202... | 11/11/202... |
| 03/11/202... | Update | Task | Appointment | 16/11/202... | 17/11/202... |
| 03/11/202... | Delete | Task | Appointment | 18/11/202... | 18/11/202... |
| 03/11/202... | Creation | Task | Appointment | 16/11/202... | 17/11/202... |
| 03/11/202... | Creation | Task | Appointment | 17/11/202... | 17/11/202... |
| 03/11/202... | Creation | Task | Appointment | 19/11/202... | 19/11/202... |
| 03/11/202... | Update | Task | Appointment | 16/11/202... | 16/11/202... |

Purge the elements before :

Order the list chronologically:

Click on the top of each column to order the list as you want.

Purge the list:

Too many data here can lower your planning. You can purge regularly the results here so that next time you connect to this menu, the list will be shorter and will be displayed more rapidly

Purge the elements before :

Copy the list:

Copy / paste the results to an external file like Excel via a button

Users rights permissions

The access to the new menu can be allowed or not within users permissions.

Indeed, if the user does not have the permission, he will not be able to see the report.

Data tracked

History of an event

Assigning access rights to your users, you will know the tracking for each events: creation date and all modifications done.

This information appears when you click at the left bottom side of the event window on "History".

Event ✕

General | Parameters | Billing

Task Installation 100 %

Client : 👤 🔍

Resource : ☒ Only one ☐ Several John

Beginning : 09/11/2020 📅 10:30 ⬆️ ⬆️ ☐ All day 🔄 Recurrence

End ☒ 09/11/2020 📅 17:30 ⬆️ ⬆️ Morning Afternoon

Duration ☐ 7.00 ⬆️ ⬆️ (H) ☐ 1.000 day(s)

0 characters 📄 🔍 ☐ Reminder :

History... OK Cancel

Then, details on this event will show:

History (3) (15 ms) ✕

Filter

Drag a column header here to group by that column.

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END | PE... | KEY | USER | PR... | CLI... | CA... | RESOURCE | STATE |
|--------------|-----------|------|--------------|--------------|--------------|-------|-----|-------|-------|--------|-------|----------|-------|
| 03/11/202... | Update | Task | Installation | 25/09/202... | 25/09/202... | No | 2 | Admin | | | | Weak | |
| 03/11/202... | Update | Task | Installation | 04/09/202... | 04/09/202... | No | 2 | Admin | | | | Weak | |
| 26/03/201... | Creation | Task | Instalación | 23/03/201... | 23/03/201... | No | 2 | Admin | | | | Weak | |

History of a client

All creations and modifications on clients can be tracked when you click on “History” at the left bottom side of the client window. To track the deletion of a client, you will need to go to the menu History directly.

History (7) (16 ms) ×

Filter

Drag a column header here to group by that column.

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END | PE... | KEY | USER | PR... | CLI... | CA... | RESOURCE | STATE |
|--------------|-----------|--------|---------------|-----------|-----|-------|-----|-------|-------|--------|-------|----------|-------|
| 03/11/202... | Update | Client | Target Skills | | | No | 1 | Admin | | | | Weak | |
| 03/11/202... | Update | Client | Target Skills | | | No | 1 | Admin | | | | Weak | |
| 03/11/202... | Update | Client | Client1 | | | No | 1 | Admin | | | | Weak | |
| 03/11/202... | Update | Client | Client1 | | | No | 1 | Admin | | | | Weak | |
| 03/11/202... | Update | Client | Client1 | | | No | 1 | Admin | | | | Weak | |
| 26/03/201... | Update | Client | Client1 | | | No | 1 | Admin | | | | Weak | |
| 26/03/201... | Update | Client | Client1 | | | No | 1 | Admin | | | | Weak | |

History of a resource

All creations and modifications on resources can be tracked when you click on “History” at the left bottom side of the resource window. To track the deletion of a resource, you will need to go to the menu History directly.

History of a project

All creations and modifications on projects can be tracked when you click on “History” at the left bottom side of the client window. To track the deletion of a project, you will need to go to the menu History directly.

Advanced data settings

Contexts management

We now have a new kind of event named "context" that allow you to add another dimension to the schedule. Indeed, you can define where your employees work every days and then, within the context, you can schedule appointments. For example, if you need to manage medical appointments with doctors on different hospitals, you can first define on which hospital each doctor should work each day and then, create appointments within this context.

PlanningPME Orion - C:\Users\mlredon\Desktop\TEST.pp - Admin

File Edit View Data Tools Action ?

Resource 15 Weekly All Services jeudi 25 février 2021 Resource Skill Client

Unavailability

| LABEL | Days off | Sick leave |
|------------|----------|------------|
| Days off | | |
| Sick leave | | |

Task

| LABEL | TIME |
|-------------|------|
| Appointment | |
| Excel | |
| Meeting | |

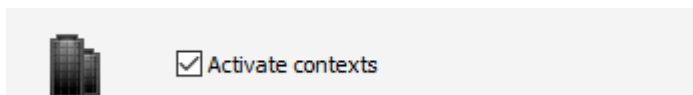
February 2021 Week 8

| | T 25 | F 26 |
|-------------------|----------|-------------------|
| Number | 1 | 4 |
| John White | | |
| Paul Grant | | |
| Lucy Kidman | | Days off |
| Megan Cox | | |
| Daniel Pitt | | Training Japanese |
| Jackie Washington | | |
| Jocelyne Durand | | Appointment |
| Christian Damon | | |
| Ben Craig | Training | |

New task
New unavailability
New context

Activate contexts

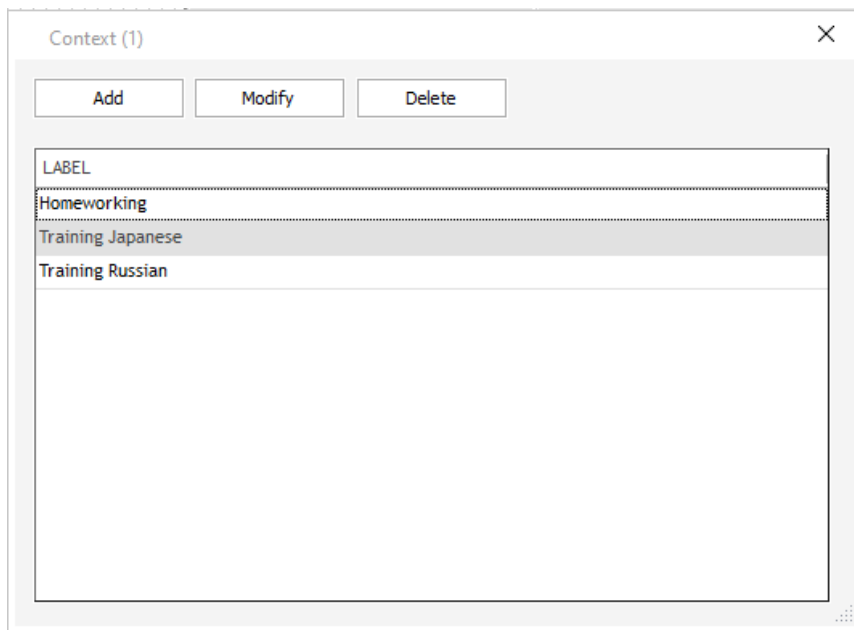
First, activate the option from the menu Tools -> Options -> Data and select "Activate as".



You now have a menu "Context" under "Data".

Add, modify or delete the list of contexts

To define a new context, press the button "Add".



You can then type a label for example "Hospital Chocolate" and define if this new context will be available for all departments or only some of them. So, on the planning, if you have writing rights on one department only, then only contextss defined for this department will be available while creating a new "context" on the planning board.

Context

General

Label :

Resource : ☒ Only one ☐ Several

Beginning : ☒ All day

End : ☒

Duration ☐ (D)

☐ Reminder :

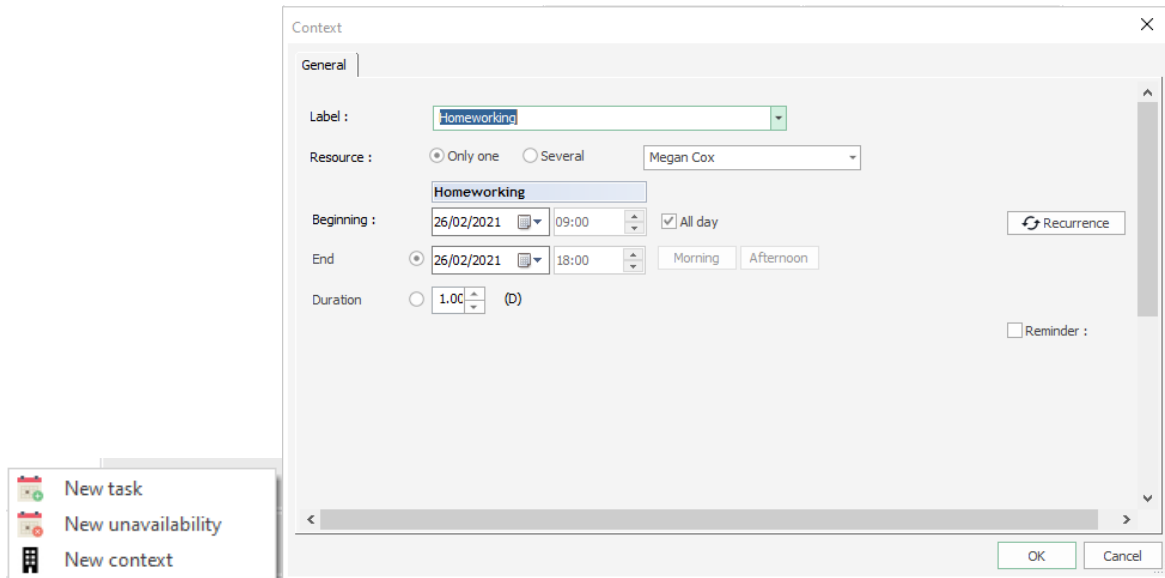
To change the text and background color, select the label on the list and change the colours directly from the "text" and "background" colours buttons at the bottom of the window.

To modify a context, double click on it on the list or right click and select "Modify".

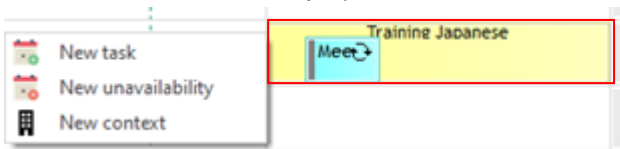
To delete a context, select it from the list and then press "Delete".

Create, modify or delete a context

On the schedule, a context will be represented by a colored rectangle with dash dots as lines. To create a new "context", right click on the planning board and select "New context".



The "Context" window will then open. You can select a label on the drop down list or type directly a new label here. If you type a new label, it will be recorded on the menu Data -> Context. Then, you can define beginning and end dates and time and even create a recurrent event if needed. You can now see that employee Mark will work at hospital Alpha on that day:



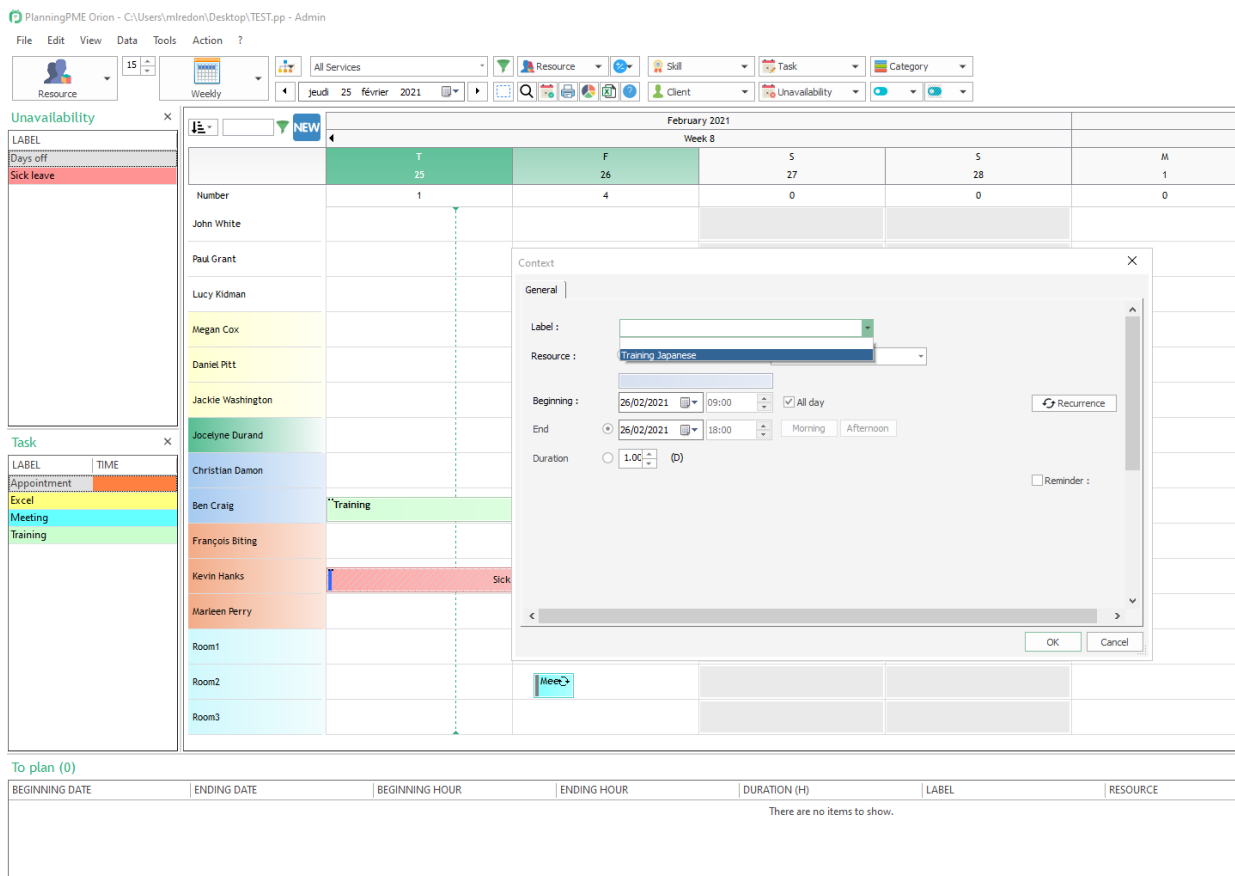
To modify a context, right click on it and select "Open".

To delete a context, right click on it and select "delete".

To copy a context, right click on it and select "copy" and then paste it with a right click and then "Paste" on another day and/or resource.

Display contexts of a department only

As mentioned earlier, you can define a context to one or more departments. Then, when filtering on one department on the planning board, when you create a new "context" only contexts of this department will appear on the drop down list.



Intuitive typing

Intuitive typing is also activated on the drop down list of contexts. When typing the beginning of a label, the program now suggests some of the labels pre-registered in order to save time.

Create some events and appointments within a context

You can then create some new appointments within this context drawing a box with your mouse.



Access rights to contexts defined per user

With the users rights management, you can define who can manage contexts: add, modify or delete rights.

Group

General
Resource
Client
Options
Event
Unavailability
Project

Internal set up

☒ Database
☒ Purge
☒ Registration of the licences
☒ Rights of users
☒ Category
☒ State
☒ Public holidays
☒ Additional fields
☒ Days off
☒ Labels and formats
☒ Options
☒ Description
☒ Import
☒ Export
☒ History
☒ Notifications
☒ Synchronization

Definition of the structure

| | Consult | Add | Modify | Delete |
|-------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Department | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Resource | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Profiles | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Skill | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Teams | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Client | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Project | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Constraints | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Template | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Dimensions | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

Current use of the schedule

| | Consult | Add | Modify | Delete |
|----------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| Task | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Context | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Indicator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Milestone | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

☒ Find
☒ Statistics
☒ PivotTable
☒ Copy/Paste
☒ Printing
☒ Selection/Creation mode
☒ Force assignment
☒ Force constraint
☒ Force skill

Advanced functions

☐ Burst
☒ Divide
☒ Availability
☒ Locking
☐ Unlocking
☒ Split
☒ Shared agendas
☒ Signature
☒ Offline not allowed
Timeout (s)
Days before
Days after

View

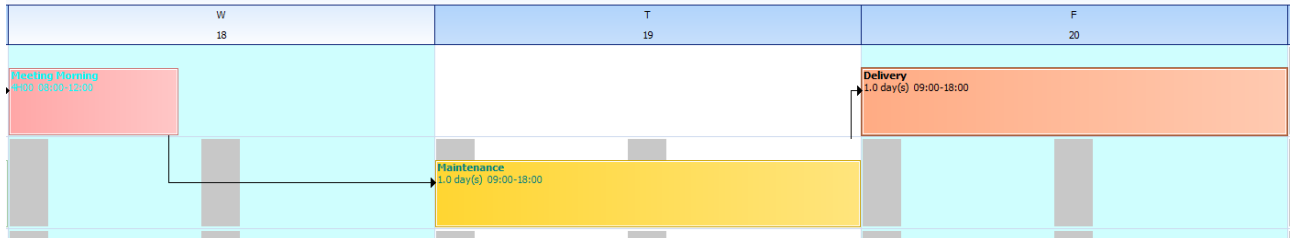
☒ Resource
☒ Task
☒ Client
☒ Project
☒ Map
☒ Agenda
☒ List

OK
Cancel

Events dependencies - Gantt chart

It is possible to manage events dependencies with PlanningPME and to precise a delay between each event.

Visualisation on the planning:




When an event is shifted on the planning, the following linked events are shifted as well.

Activate this option

Option to activate in the menu Tools -> Options -> Event and select “Events dependencies”.

Project _____

 ☐ Activate projects

☒ Events dependencies

☒ With automatic shift

Add, modify, delete a link

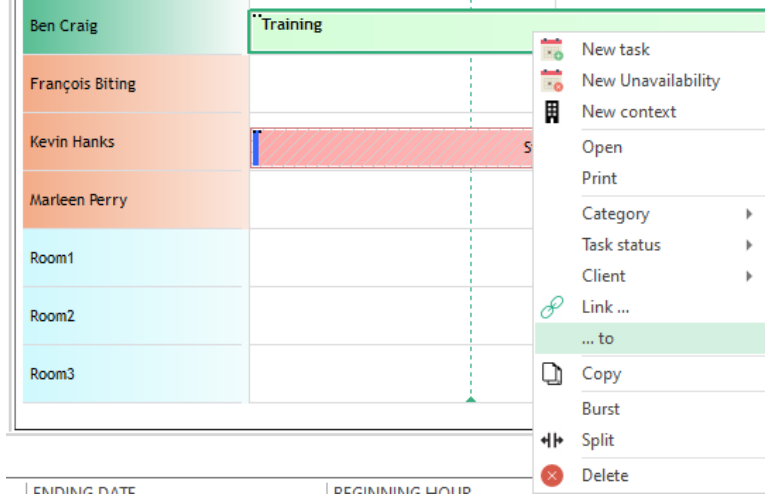
Create a link

-> Right click on the events

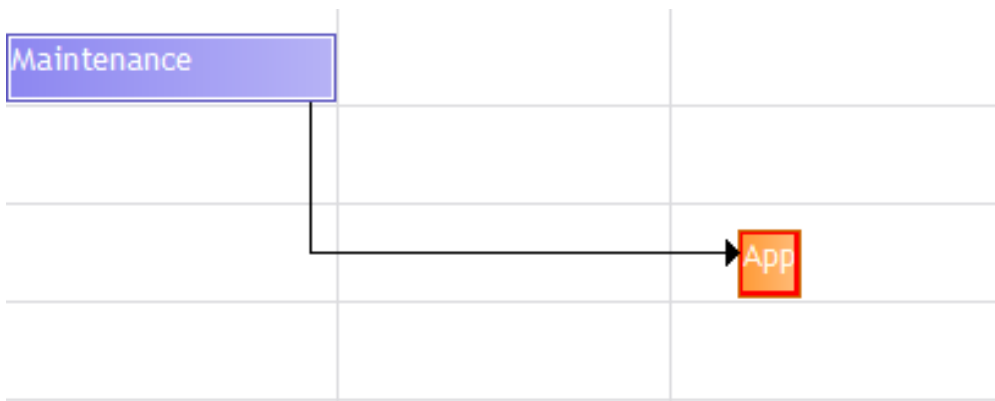
Go to the first event, right click, select Link

The screenshot shows the PlanningPME Orion desktop application. The main window displays a resource calendar for February 2021, specifically Week 8. The calendar is organized by resource (rows) and time (columns). Resources listed include John White, Paul Grant, Lucy Kidman, Megan Cox, Daniel Pitt, Jackie Washington, Jocelyne Durand, Christian Damon, Ben Craig, François Biting, Kevin Hanks, Marleen Perry, Room1, Room2, and Room3. A context menu is open over the 'Training' task for Ben Craig, showing options like 'New task', 'New Unavailability', 'New context', 'Open', 'Print', 'Category', 'Task status', 'Client', 'Link...', 'Copy', 'Burst', 'Split', and 'Delete'. The 'Link...' option is highlighted. The interface also includes a menu bar (File, Edit, View, Data, Tools, Action, ?), a toolbar with various icons, and sidebars for 'Unavailability' and 'Task' management.

Then, go to the second event and select ...to



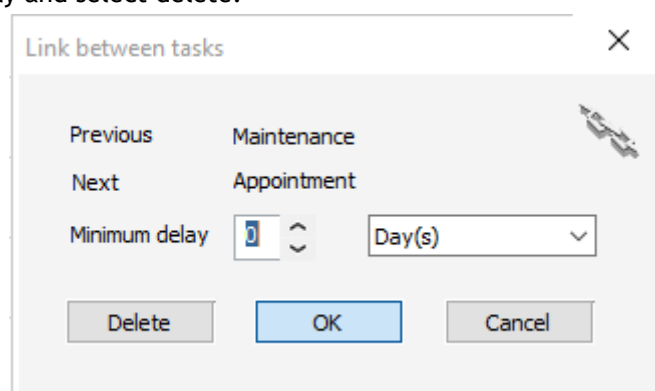
Results:



The black arrow shows that the events are linked.

Delete a link

Click on the arrow directly and select delete:



You can also remove a link easily in PlanningPME from the “Successors” window of the event:

Event

General | Details | Equipment | Links

Predecessors

| Beginning | End | Task | Delay | Resource |
|-----------|-----|------|-------|----------|
| | | | | |

Successors

| Beginning | End | Task | Delay | Resource |
|--------------------|-------------------|-------------|----------|----------|
| 25/11/2020 to 1... | 25/11/2020 to ... | Appointment | 0 day(s) | Tim |

Define a delay between the events

You can also precise a delay between two events clicking on the arrow. This windows appears:

Link between tasks

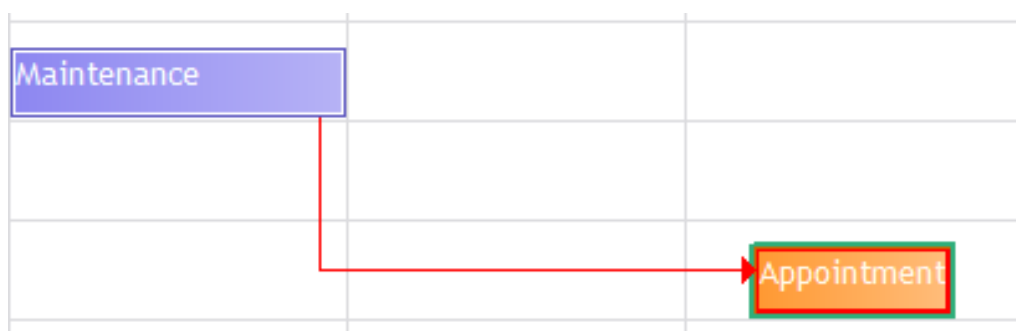
Previous Maintenance

Next Appointment

Minimum delay

Delete OK Cancel

When a delay is specified, the arrow colour changes from black to red.



Visualize the direct successors of an event

When you open an event, you now have a tab “Successors” that show you all the direct successors of an event:

Event

General | Details | Equipment | Links

Predecessors

| Beginning | End | Task | Delay | Resource |
|--------------------|-------------------|-------------|----------|----------|
| 25/11/2020 to 1... | 25/11/2020 to ... | Appointment | 0 day(s) | Tim |

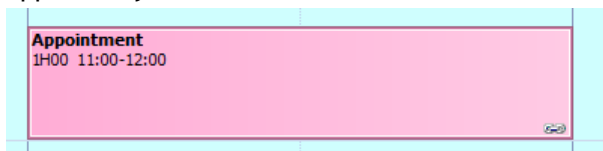
Successors

| Beginning | End | Task | Delay | Resource |
|--------------------|-------------------|-------------|----------|----------|
| 25/11/2020 to 1... | 25/11/2020 to ... | Appointment | 0 day(s) | Tim |

NB: You cannot add or delete any links from here.

Hide the links on the planning board

You can hide the links if your planning is too crowded via the command CTRL + L. then, this icon will appear on your event linked:



Shift events on the planning board

Rules while shifting an event

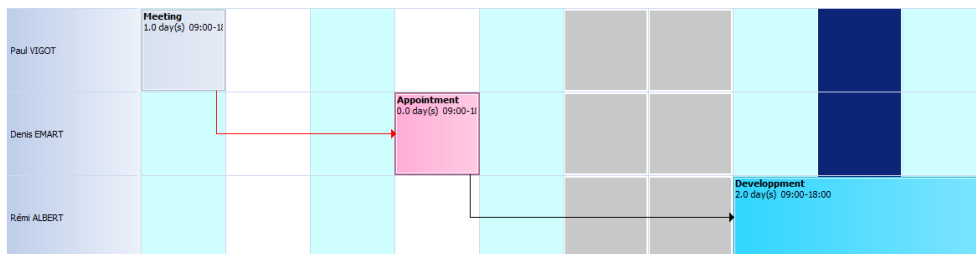
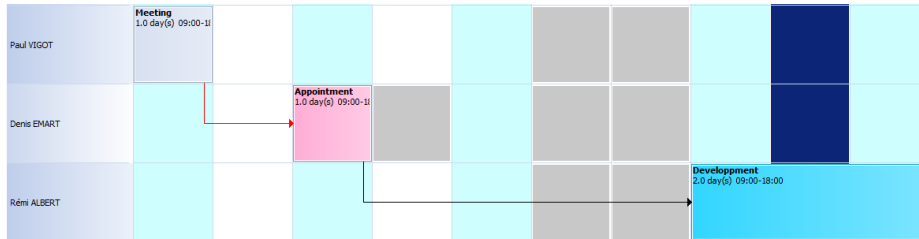
- 1 -> While shifting an event in the future, previous events are not shifted. Only successive events are shifted.
- 2 -> While shifting an event in the past, previous and next events are not shifted. If you shift an event in the past and you do not respect the delay specified with the previous event, the software will not let you shift it.
- 3 -> If a delay is specified, the delay is kept while shifting an event.
- 4 -> While shifting an event, there is no search for availability: if the resource already has an event assigned, there will be two events displayed for the same day.

Example:



5 -> While shifting an event, there is no search for availability: if the resource already has an event assigned, there will be two events displayed for the same day.

Example



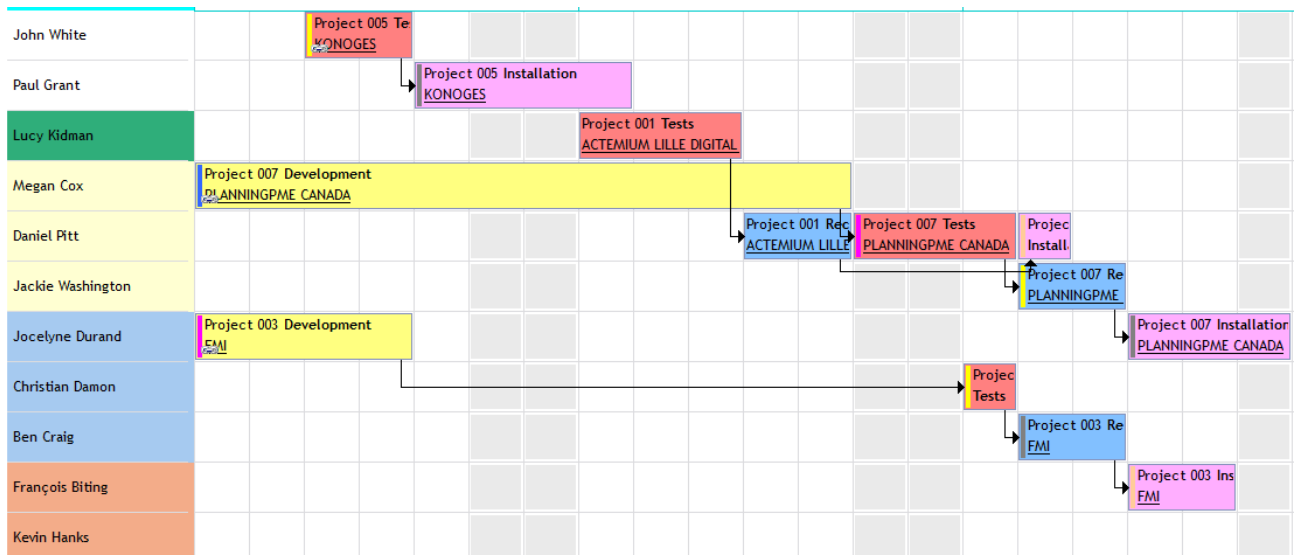
On the example above, when we shift the green event:

- The brown event is shifted as well as it is a successive event
- The yellow event do not move as it is a previous event

Events template

Definition of a template

An events template is a list of events with different durations and linked information like delay between events.



Within some industries like manufacturing, garages, calling predefined events templates are necessary when having a new job to complete in order to save time avoiding creating one by one the events allocated to one type of job.

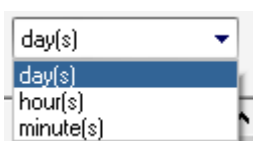
Create a new template

Go to the menu Data -> Templates and click on "Add".

| N° | TASK | DURATION | PREDECESSOR | DELAY | RESOURCE |
|----|-------------|----------|-------------|-------|----------|
| 1 | Study | 3 | 0 | 0 | |
| 2 | Development | 5 | 1 | 0 | |
| 3 | Tests | 1 | 2 | 0 | |
| 4 | Training | 1 | 3 | 0 | |
| 5 | | 1 | 0 | 0 | |
| 6 | | 1 | 0 | 0 | |
| 7 | | 1 | 0 | 0 | |
| 8 | | 1 | 0 | 0 | |
| 9 | | 1 | 0 | 0 | |
| 10 | | 1 | 0 | 0 | |
| 11 | | 1 | 0 | 0 | |
| 12 | | 1 | 0 | 0 | |
| 13 | | 1 | 0 | 0 | |
| 14 | | 1 | 0 | 0 | |
| 15 | | 1 | 0 | 0 | |

Label: Give a name to your template

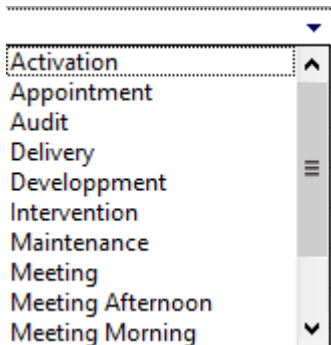
Unit: Select the unit for your events: Minutes, hours or days



This unit will then be applied for the event duration and the delay between two events.

N°: This is the event number

Task: Select your task on the drop down list. This list is the one you have on the menu “Data” -> “Tasks”



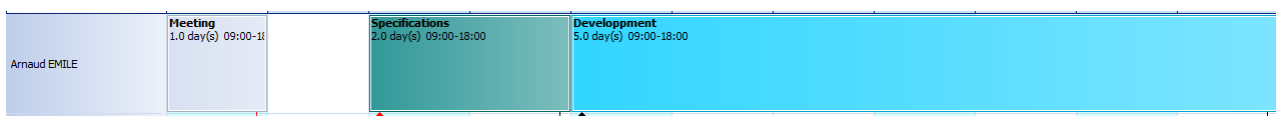
Duration: Specify the duration for each task

Predecessor: This field is not mandatory. You can precise here the predecessor of the task giving the number of this task. The two tasks will then be linked. In the example below, the task “programming” is linked to the task “Analysis”:

| N° | Label | Duration | Predecessor | Delay | Resource |
|----|----------------|----------|-------------|-------|----------|
| 1 | Meeting | 1 | 0 | 0 | |
| 2 | Specifications | 2 | 1 | 0 | |
| 3 | Developpment | 5 | 2 | 0 | |

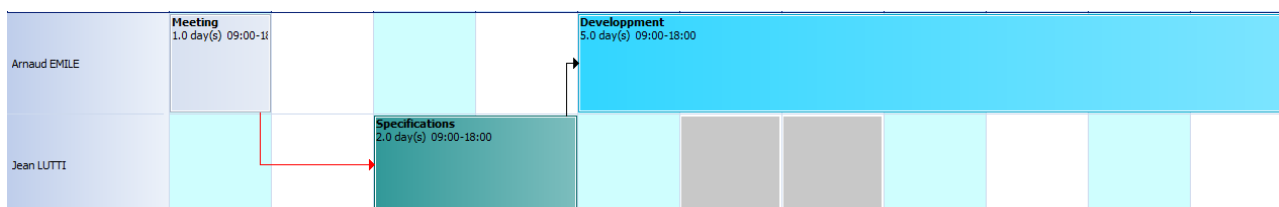
Delay: Delay between this event and its predecessor. This field is not mandatory. When you specify a delay, it appears in red on the planning board. In the example below, the task “programming” is linked to the task “Analysis” and the delay is 2 days:

| N° | Label | Duration | Predecessor | Delay | Resource |
|----|----------------|----------|-------------|-------|----------|
| 1 | Meeting | 1 | 0 | 0 | |
| 2 | Specifications | 2 | 1 | 1 | |
| 3 | Developpment | 5 | 2 | 0 | |



Resource: This field is not mandatory. You can assign each event to a resource by default. Then, while putting your template in production on the schedule, each event will be allocated to a resource by default:

| N° | Label | Duration | Predecessor | Delay | Resource |
|----|----------------|----------|-------------|-------|--------------|
| 1 | Meeting | 1 | 0 | 0 | Arnaud EMILE |
| 2 | Specifications | 2 | 1 | 1 | Jean LUTTI |
| 3 | Development | 5 | 2 | 0 | |



You then have this kind of events template:

| | Label | Specific Development | | Unit | day(s) |
|----|------------------|----------------------|-------------|-------|---------------------|
| N° | Label | Duration | Predecessor | Delay | Resource |
| 1 | Meeting | 1 | 0 | 0 | To Plan Tech |
| 2 | Specifications | 2 | 1 | 1 | To Plan Tech |
| 3 | Development | 5 | 2 | 0 | To Plan Development |
| 4 | Test development | 2 | 3 | 0 | To Plan Development |
| 5 | Delivery | 1 | 4 | 0 | To Plan |
| 6 | | 1 | 0 | 0 | |

You can create as many templates as you want:

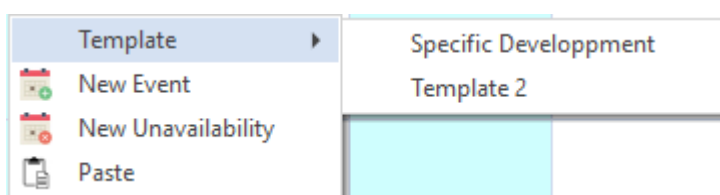
You can see the duration for each template that is the sum of the duration for all the events of one template.

Note that **you can copy an already existing template** in order to save time. To do so, just select the template and press “Copy”. The template will then be copied and you can adjust it and rename it.

Creation of a new “job” from a template

Creation

In the planning board, right click and select “template”. Then, the list of all your templates will be displayed and you can select one of them.

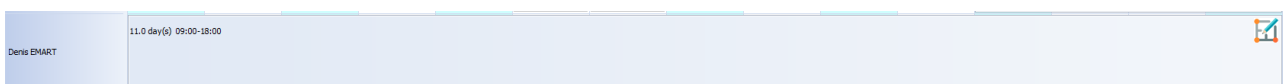


Then, this creation window appears:

You can specify the following information:

- Project Name
- Template
- Client Name
- Resource name: Only one resource can be assigned.
- Beginning date: the end date is calculate automatically from the events template.
- Comments

Then, in a first time, on the planning board, only one first event will be drawn:



Production

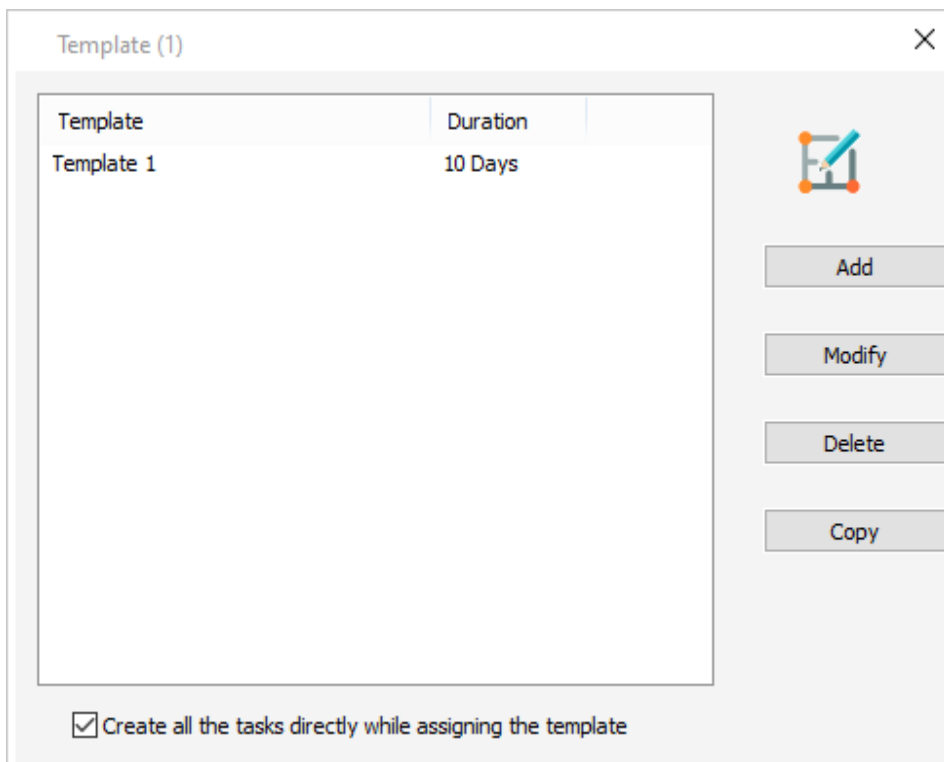
Then, once you want to put your new job in production, you just need to right click and then select "Production":

Your job will be divided into the different events you defined in the template.

Then, you can assign the different events to your resources and adjust your schedule.

Create all jobs directly while assigning the template

You can activate this option in order to create all the events directly skipping the step "Produce".



Rename "Template" and "Production"

In order to adapt PlanningPME to your activity, you can rename the label "Template" and "Production" from the menu "Tools" -> "Labels and format"

Hide links

You can also hide the links of your schedule pressing the keys « **CTRL + L** » in order to have a good overview of your schedule.

Assign all events to one resource

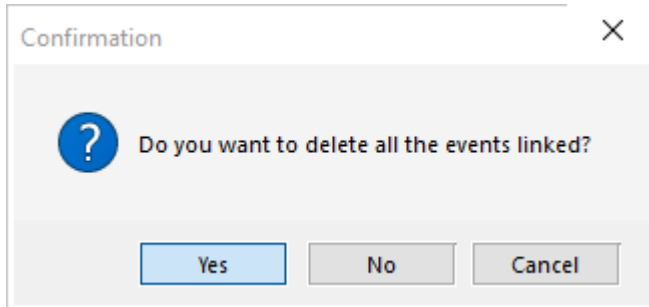
If you need to shift all the events into one resource, just right click on one of the linked event and select “Assign to”. Then, all events will be assigned to the resource selected.

Delete one event or all linked events

You can decide to delete either one linked event or all the events linked.

To do so, right click on the event and select “Delete”:

Then, you will get this message:



if you press “Yes”, all the events linked will be deleted.

If you press “No”, only the event selected will be deleted.

Advanced IT functions

Synchronization with Outlook

You can synchronize both ways from PlanningPME to Outlook and from Outlook to PlanningPME.

Activation of this option

From PlanningPME, go to the menu « Tools » -> « Options » -> « Outlook ». The following window appears.

Options

Timetables | Display | Data | Event | Outlook | User | advanced |

Mailing box

Email : ☐ SMTP ☒ Outlook ☐ Send an invitation

Fields

Copy:

Mobile

Sent to ☒ Resource ☐ Client ☐ Both

☐ Display the message before sending it

☐ Attach the mission sheet

Outlook

☒ Authorize synchronization with Outlook

☐ Exchange

☒ Do not synchronize events older than Days

Frequency of synchronization (mins) :

You are

From PlanningPME to Outlook

☐ Synchronize all to: ☒ Appointment ☐ Task

From Outlook to PlanningPME

☐ Synchronize all appointments

☐ Synchronize all tasks

OK Cancel

Tick on the box « Authorize synchronization with Outlook ».

Fields

Select the fields you want to synchronise clicking on the button “Fields”

Do not synchronise events older than

Select the time period: All events older will not be synchronised.

Frequency

Choose the synchronization frequency - Minimum: 5 minutes

You are

Precise who you are: Choose on the list of human resources your name. Events created for this resource selected will be synchronized to your Outlook.

Select the different options of synchronization from Outlook to PlanningPME: Do you want to synchronize all appointments and/or all events from Outlook to PlanningPME?

Select the different options of synchronization from PlanningPME to Outlook: Do you want to synchronize all events to Outlook Calendar or Outlook Events?

From Outlook to PlanningPME

You can synchronize all appointments and / or events from Outlook to PlanningPME.

Description

From Outlook to PlanningPME



☐ Synchronize all appointments
 ☒ Synchronize all tasks

Careful: All your events and / appointments will be imported the first time you activate this option. Make sure you really want to activate this option.

Fields Synchronized

. Events marked as « Private » are not synchronized.

. Events not marked as “Private” are synchronized. Here are the details on the fields synchronized:

| | Outlook | PlanningPME |
|---------|------------------------|--|
| Field 1 | Subject | Label |
| Field 2 | Starting Date and Time | Beginning Date and Time |
| Field 3 | End Date and Time | End Date and Time |
| Field 4 | Comments | Comments |
| Field 5 | Reminder | Reminder like shown here: <div> <div>15 minutes</div> <div> <input checked="" type="checkbox"/> Reminder :  </div> </div> <p>EXCEPT IF the option “Event reminder using a date” is activated on the menu “Tools” -> “Options” -> Event</p> <div> <div>08:00</div> <div>19/05/2008</div> <div> <input checked="" type="checkbox"/> Reminder :  </div> </div> <p>In that case, the reminder will not be synchronized.</p> |

Behaviour of the synchronization

From Outlook to PlanningPME

☐ Synchronize all appointments

☐ Synchronize all tasks

| Action in Outlook | Consequence in PlanningPME |
|--|---|
| Creation of an event in Outlook Calendar | Creation of an event if the option "Synchronize all appointments" is selected |
| Creation of an event in Outlook | Creation of an event if the option "Synchronize all events" is selected |
| Modification | Modification |
| Deletion | Deletion |
| Creation of a recurrent booking | Nothing created |
| Creation of a private event | No event created |

See point IV.4 to learn about the behaviour of the synchronization if users rights are activated.

From PlanningPME to Outlook

Synchronization of all the events

You can synchronize all events from PlanningPME to Outlook appointments or events.

From PlanningPME to Outlook

☐ Synchronize all to: ☒ Appointment ☐ Task

The events will be synchronized automatically to Outlook Appointments OR Events.

You also have the possibility to select task by task whether you want to send them to Outlook tasks or appointments. See next chapter.

Synchronization task by task

To decide task by task which ones will be sent to Outlook, do not activate this option below:

From PlanningPME to Outlook

☐ Synchronize all to: ☒ Appointment ☐ Task

Then, on the planning board, for each task, you can decide if you want to synchronize them to Outlook task or appointment with a right click, Outlook -> Synchronize to tasks or appointments.

You can also decide to stop the synchronization event by event with a right click -> Outlook -> Stop the synchronization.

Fields Synchronized

. NB: Only events are synchronized. Unavailabilities are not synchronized.

The reminder is also synchronised:

15 minutes ☐ Reminder :

NB: If the option “Event reminder using a date” is activated, the reminder will not be synchronized in Outlook.

Behaviour of the synchronization

From PlanningPME to Outlook

☐ Synchronize all to:

☒ Appointment

☐ Task

| Action in PlanningPME | Consequence in Outlook |
|---------------------------------|----------------------------------|
| Creation of an event | Creation of an event |
| Modification of an event | Modification |
| Deletion of a task | Deletion |
| Creation of an unavailability | Nothing created |
| Creation of a periodical event | Nothing created |
| Event gotten off the recurrence | Creation of an event or an event |

Behaviour of the synchronization when users rights are activated

1st scenario - Users permissions: Reading access but not writing access

Menu Data -> User

This user can visualize all departments but do not have writing access to the departments. It means that he is not allowed to add, modify or delete anything on the schedule.

So, if he tries to make some changes on his Outlook, here is the behaviour of the synchronization:

| Action in Outlook | Result |
|--|--|
| Creation of an event or an event in Outlook | Nothing created |
| Modification of an event or event in Outlook | No changes in PlanningPME - At the next synchronization, the event modified will be back to its initial place. |
| Deletion of an event or event in Outlook | No changes in PlanningPME - At the next synchronization, the event deleted will be back. |

2nd scenario - Groups permissions on the Event field

Menu Data -> Group

| Current use of the schedule | | | | |
|------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| | Consult | Add | Modify | Delete |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| List of the unavailabilities | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Event | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> |
| Unavailability | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Assignment | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| Indicator | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |

The rights selected for the Event (Add, Modify, Delete) will be applied while synchronizing.

Master Data

If an event is modified both in Outlook and PlanningPME, the latest modification will be taken into account.

With this synchronization, you will save time avoiding a double typing of your appointments and other events.

Description of the comments in Outlook

Now, you can select the fields you want to have on the comments while synchronizing your events with Outlook from the button “Fields”.

Description

Destination: ICS Calendar: comments

Available fields:

- Address
- Address Client
- Category
- City
- City Client
- Client
- Client Mobile
- Contact First Name
- Contact Name
- Country Client
- Duration
- Duration achieved
- Floor
- Mobile resource
- Name of division
- Number Client
- Order form
- Percentage
- Percentage of completion

Selected fields:

Comments

Buttons: Add, Delete, Move up, Move down, OK, Cancel, Apply

If you select some fields here, the comments box in Outlook will show the fields you selected.

If you do not select anything on the outlook description, the comments in PlanningPME will be synchronized with the comments in Outlook. Otherwise, if selecting some fields and that you add some more comments in Outlook, the updates will not be done from Outlook to PlanningPME. PlanningPME description will always be the master data.

Import / Export of data from PlanningPME

You can Import / Export data on clients, events and unavailabilities under special txt format from the menu File -> Import or Export.

Import

It is possible to import clients, events or unavailabilities under **text format with tabulation as separator**.

NB: To work with Excel files, you will first have to convert your Excel file under text file.

Import your clients

From PlanningPME, go to the menu "File" -> "Import" -> "Clients"

Upload your text file clicking on the arrow of the window below.

Associate the corresponding fields selecting the available fields on the left and the base field on the right.

Importing clients file

File : P:\Documentation\Evolutions\Import donnees WA\customers.txt

Available fields

- Sr no
- ProjectName
- ProjectNumber
- Size
- Customer Number
- Country
- Category
- ProjectManager
- Project Open date
- Status
- Company

Associate

Dissociate

Associated fields

| Base field | Associated field |
|------------|------------------|
| COMPANY | Company |
| NAME | |
| FIRST NAME | |
| ADDRESS | |
| ZIP CODE | |
| CITY | |
| COUNTRY | Country |
| PHONE | |
| MOBILE | |
| FAX | |
| EMAIL | |

Import Close

Then click on "Import".

Import events or unavailabilities

The set up to import events or unavailabilities is more complex than for clients. Indeed, your text file must have a precise format.

The events will be created automatically on the schedule if your text file is correct.

Format type of the text file:

task.txt - Bloc-notes

Fichier Edition Format Affichage ?

| N° | Nom_tâche | Date_début | date_fin | Noms_ressources | Remarques |
|----|-----------|------------|----------|-----------------|-----------|
|----|-----------|------------|----------|-----------------|-----------|

For more information on this type of import, you can contact our technical team:
support@planningpme.com

Export

You can export your clients, events and unavailabilities under text files.

From PlanningPME, go to the menu "File" -> "Export".

Clients export

Enter the name of the file exported and save.

The exported file looks like this text file:

clients.txt - Bloc-notes

Fichier Edition Fgmat Affichage ?

| SOCIETE | PARTICULIER | SOCIETE | CIVILITE | NOM | PRENOM | ADRESSE | CP | VILLE | PAYS | TELEPHONE | FAX | GSM | EMAIL | NUMERO_CLIENT |
|-----------|-------------|---------|----------|-----|--------|---------|----|-------|------|-----------|--------|-----|-------|---------------|
| Company A | | 1027 | 0 | | 75000 | Paris | | | | | 108238 | | | |

Events or unavailabilities export

Give the period of time you want to export.

Export of the tasks

from

29-Oct-20

to

20-Nov-20

Export

Cancel

Click on "Export" and save your text file.

The exported file looks like this text file:

task.txt - Bloc-notes

Fichier Edition Format Affichage ?

| N° | Nom_tâche | Date_début | date_fin | Noms_ressources | Remarques |
|----|--------------------|------------------|------------------|-----------------|-----------|
| 1 | Specifications | 27/03/2018 | 30/03/2018 | To Plan | |
| 2 | Delivery | 29/03/2018 | 30/03/2018 | | |
| 3 | Appointment | 29/03/2018 | 30/03/2018 | Farid AMIR | |
| 4 | Developpement | 29/03/2018 | 30/03/2018 | Julie COMBEAU | |
| 5 | Delivery | 30/03/2018 | 30/03/2018 | Paul VIGOT | |
| 6 | Training | 30/03/2018 | 30/03/2018 | To Plan | |
| 8 | Test developpement | 30/03/2018 | 30/03/2018 | Denis EMART | |
| 9 | Appointment | 30/03/2018 11:34 | 30/03/2018 13:34 | Arnaud EMILE | |
| 10 | Developpement | 30/03/2018 14:00 | 30/03/2018 17:00 | Jean LUTTI | |

Functions for IT specialists and developers

Performances of the database

We now have more information on the performances of PlanningPME from the Menu File -> Database -> Performances.

Performances / Database

Performances

Load planning :

32 ms

Load recurrence :

0 ms

Indicators calculation:

0 ms

Event loading :

0 ms

Saving event :

0 ms

Search for availability :

0 ms

Draw planning :

31 ms (16-0-15) 0 ms

Planning filter:

0 ms

Number of events loaded:

54

Careful: displaying resources on the event description box lower loading performances of the schedule.

172 ms

| Table | Number |
|----------------------|------------|
| Task non periodical | 68 |
| Task Periodical | 2 |
| Department | 5 |
| Resource | 13 - 94 ms |
| Client | 7 - 0 ms |
| Equipment | 16 |
| Project | 0 - 0 ms |
| Subproject | 0 |
| Label Task | 7 |
| Label Unavailability | 3 |

It allows to have an idea of the performances of the database on loading, calculation, number of data.

Improve performances

Also, to increase your planning performances, if not done yet, we highly advise you to migrate from MS Access to SQL Server database. Contact Target Skills for more information.


Have your database hosted on Target Skills servers

If you want Target Skills to host your database and assume the full maintenance on your system, you can now have your database hosted on our server. We invite you to contact your sales contact in order to have more information.

Scripts execution

You can launch some scripts while launching or charging PlanningPME. You can add them from the menu Tools -> Options -> Advanced.

Script



Script while launching PlanningPME

->

Script while charging PlanningPME

->

Charging PlanningPME =Creation, modification or deletion of an event on the planning board.

Launch of the schedule with criteria

Ex1: planningpme
/date=1/1/2009 /filter=Administration /planning=Monthly
/view=resource /[champ sup]=[value].

Ex2: planningpme /base=Driver={Oracle in OraHome92};DBQ=PLANNING;UID=PLANNING;

PWD=PLANNING /oledb=1 /schema=PLANNING. /fr=0 /us=0

Object model PlanningPME COM

You have the possibility to make links between your databases and /or management softwares and PlanningPME.

- PlanningPME COM: <http://www.planningpme.com/object-model-planningpme.htm>

As an example, you can import your existing client database in PlanningPME and, then, you can synchronize regularly those databases. you avoid double typing!

PlanningPME COM allows you to integrate PlanningPME into your data system.

Plugin PlanningPME

Why a plug-in PlanningPME?

- In order to insert controls (button) in the PlanningPME interface and associate actions.
- In order to make automatic actions for example add or update an event.