# 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.

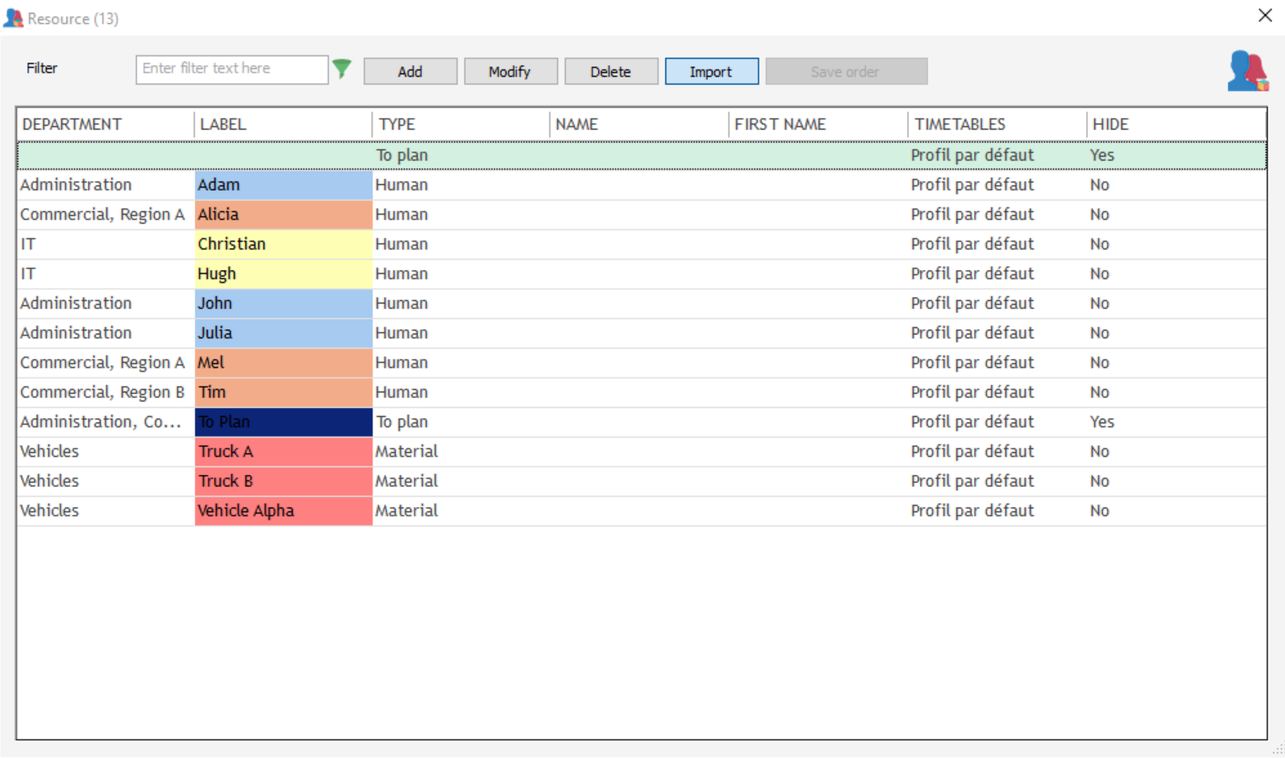
## Resources

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

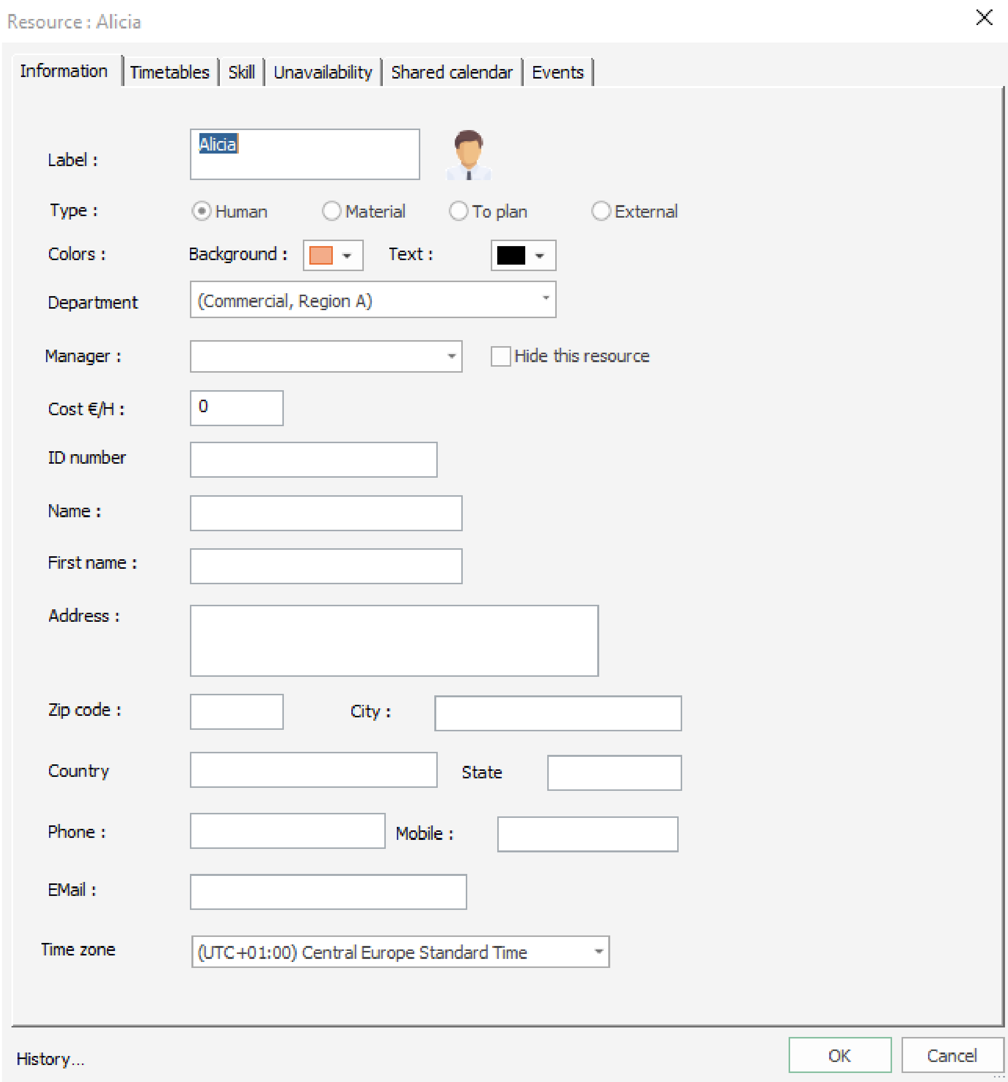
### Create resources

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".




| 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:

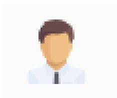


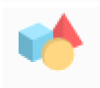

## Label

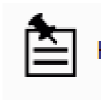
This label will appear on the planning board.

## 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.

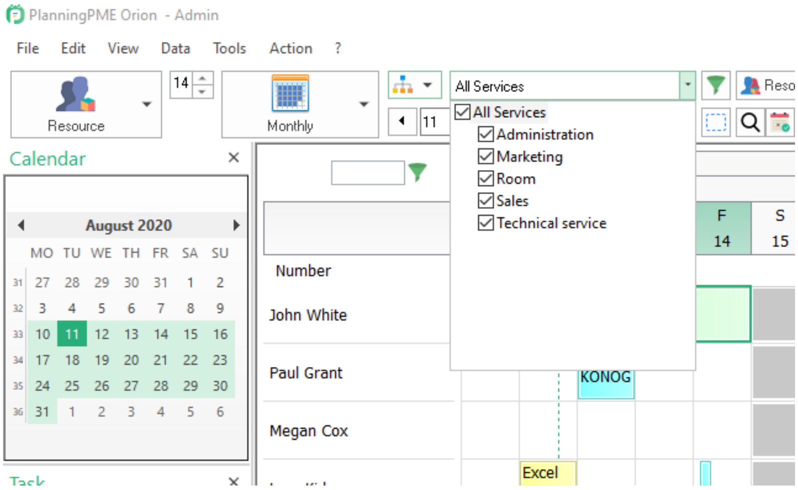
### Other information

Choose a color for your resource.
Assign the resource to a department.
Etc…

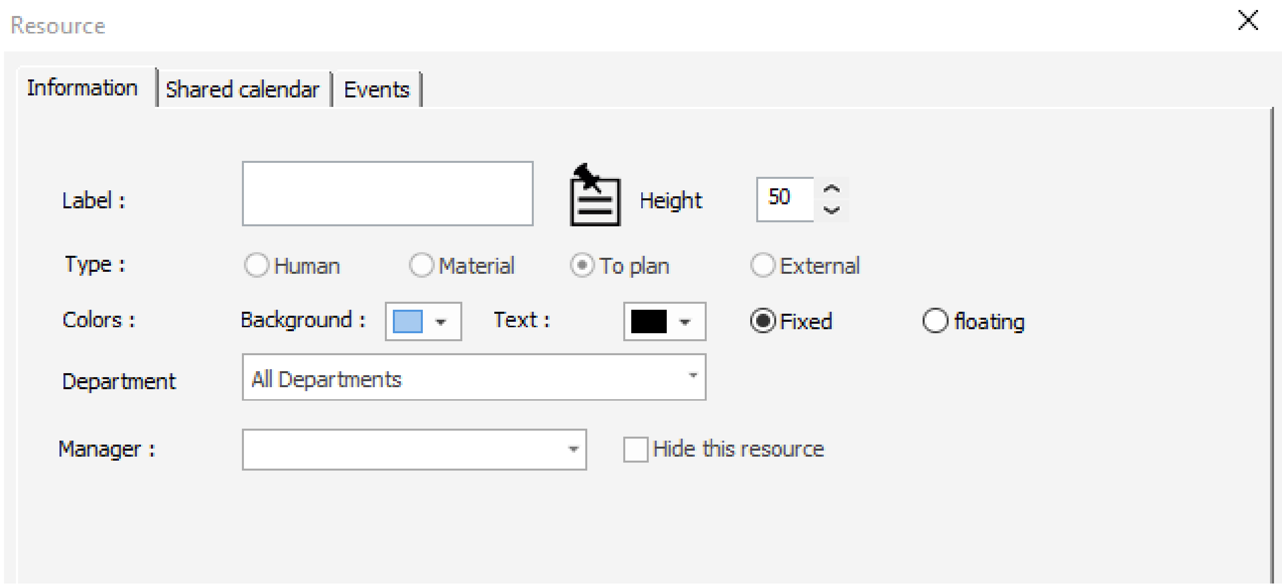
So, you can create as many human and material resources as you want in a very simple way.

### Display one or more resources on the screen

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

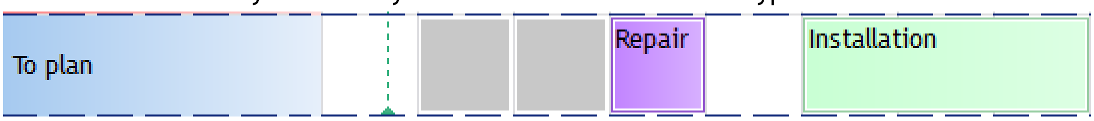



## Zoom on resources of the type “To plan”




### 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

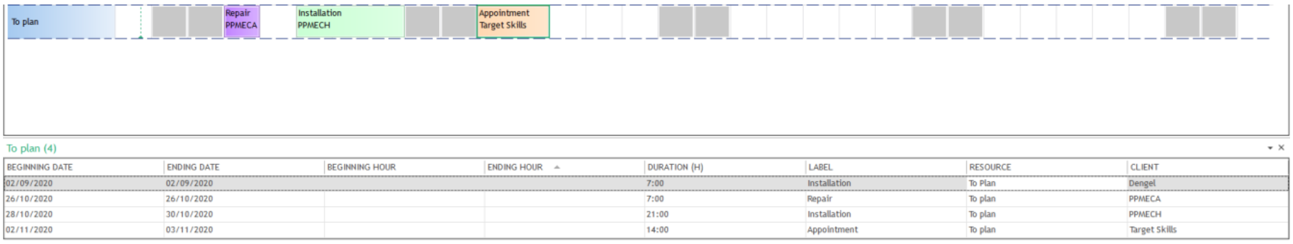
The events on the planning appear only on the planed dates and you can have several events at the same time:

### 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:




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

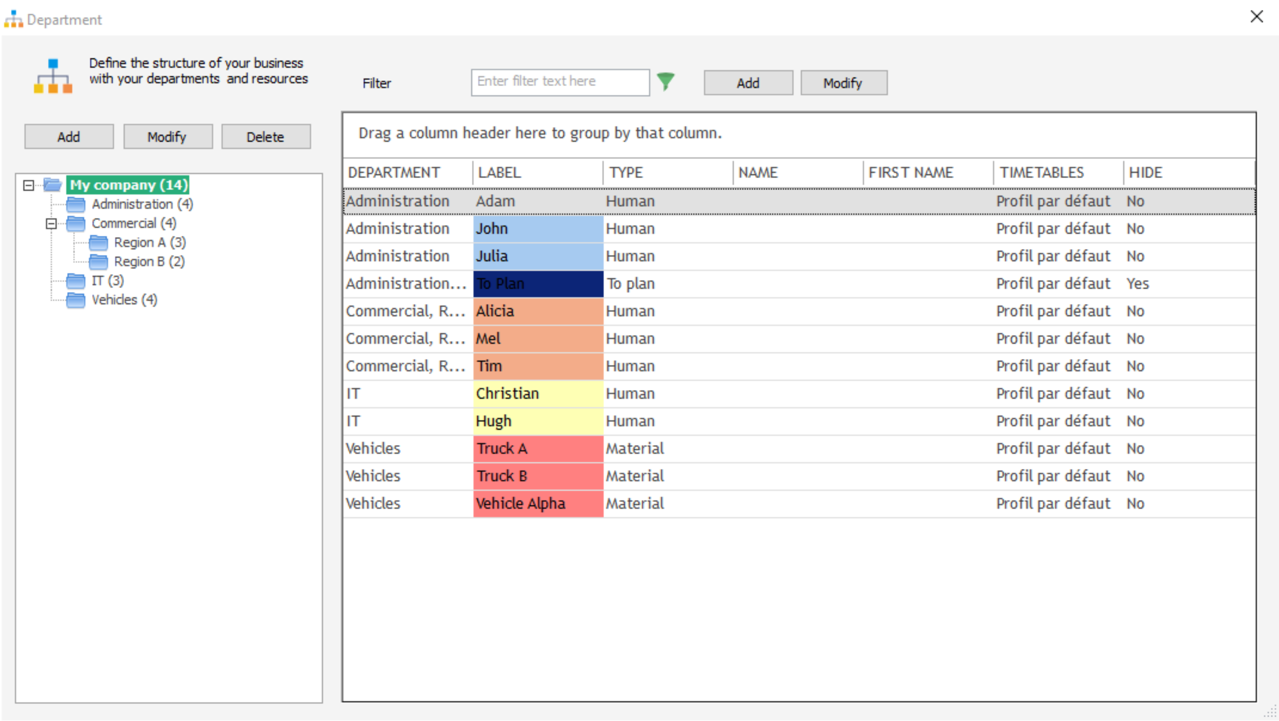
## Departments

### Group resources by department

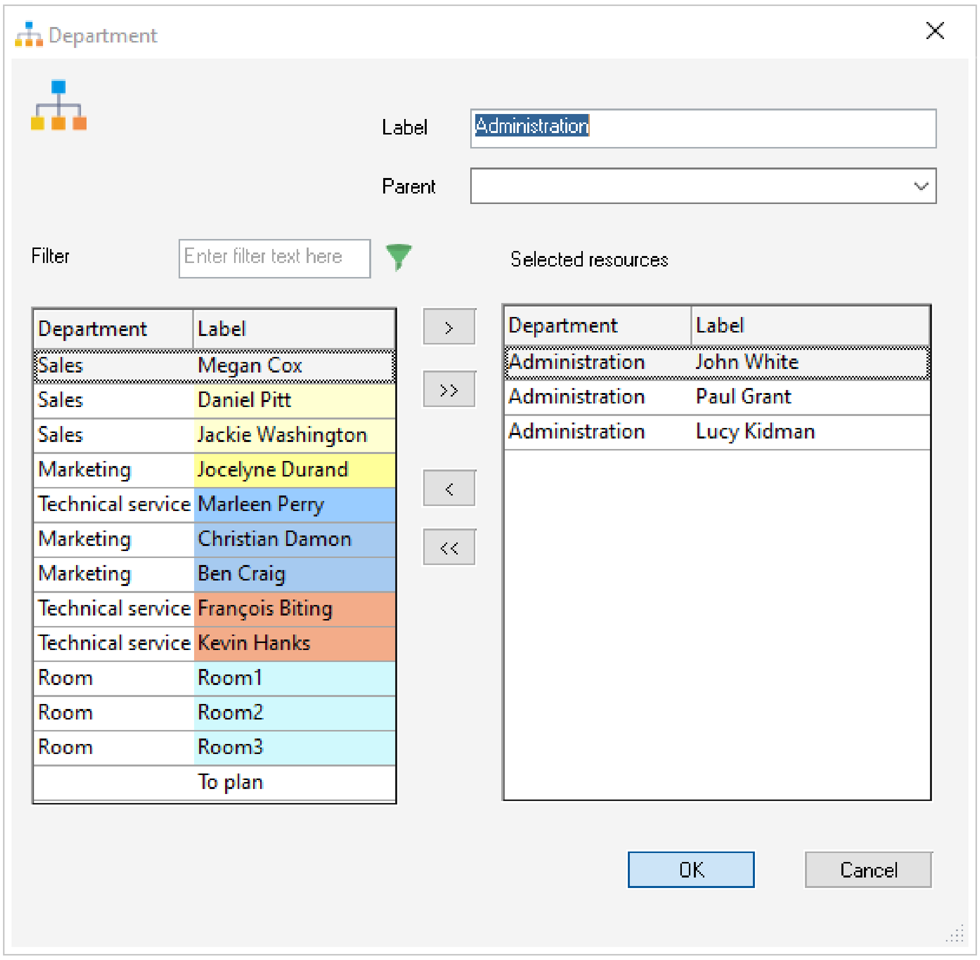
You have the possibility to create departments, as an example: Sales department, Account department, Technical team...
From your entire schedule, you can extract the schedule of one department for a better visibility.

### Create departments

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



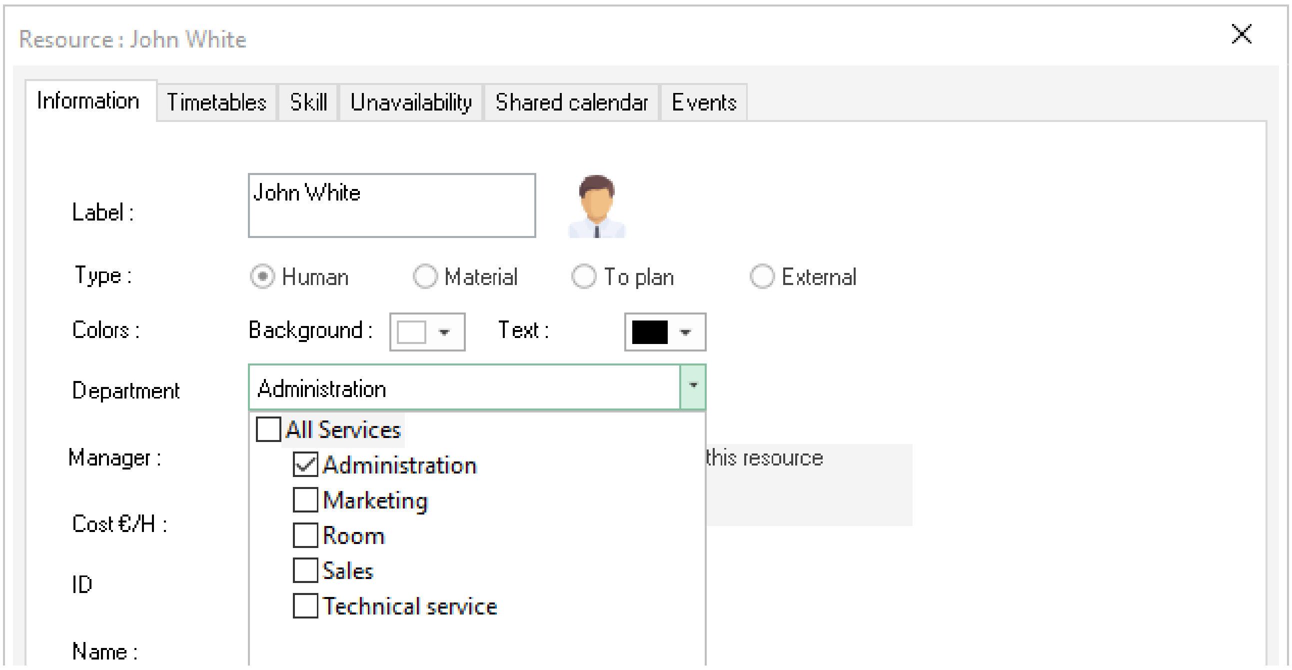

Click on “Add” and give a label to your department. Then select the resources for this department and save.




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.

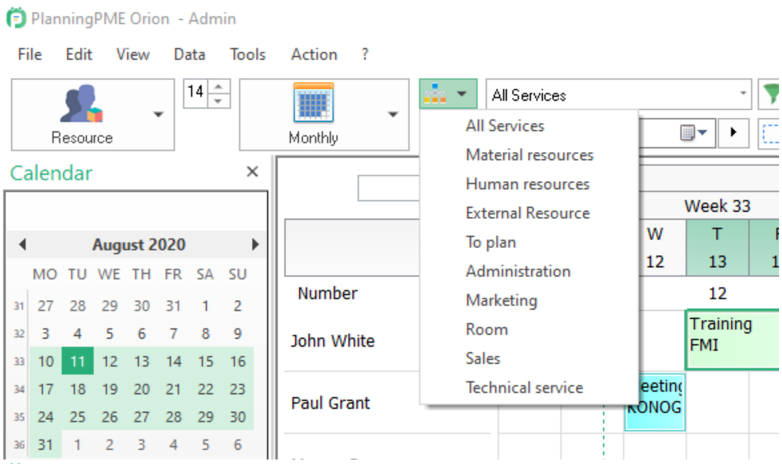
You can add a resource to a department directly from the “Resource” window.

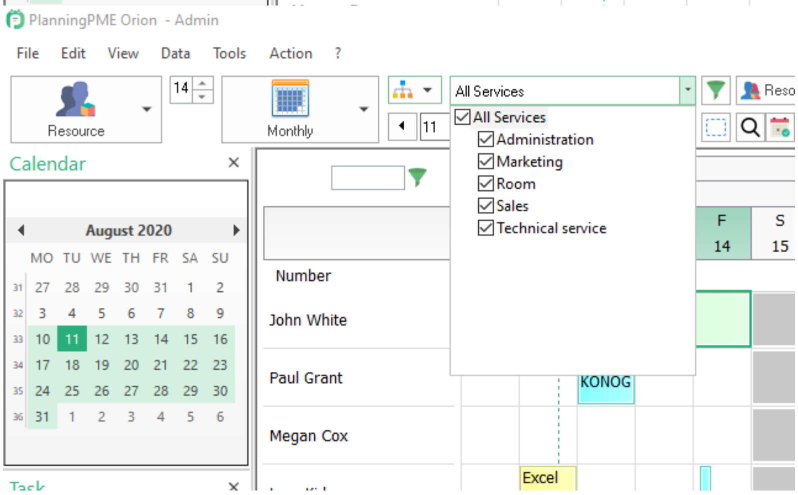



Proceed the same way for all your resources. You can assign your resources to several departments.

### Display one or more departments on the screen

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



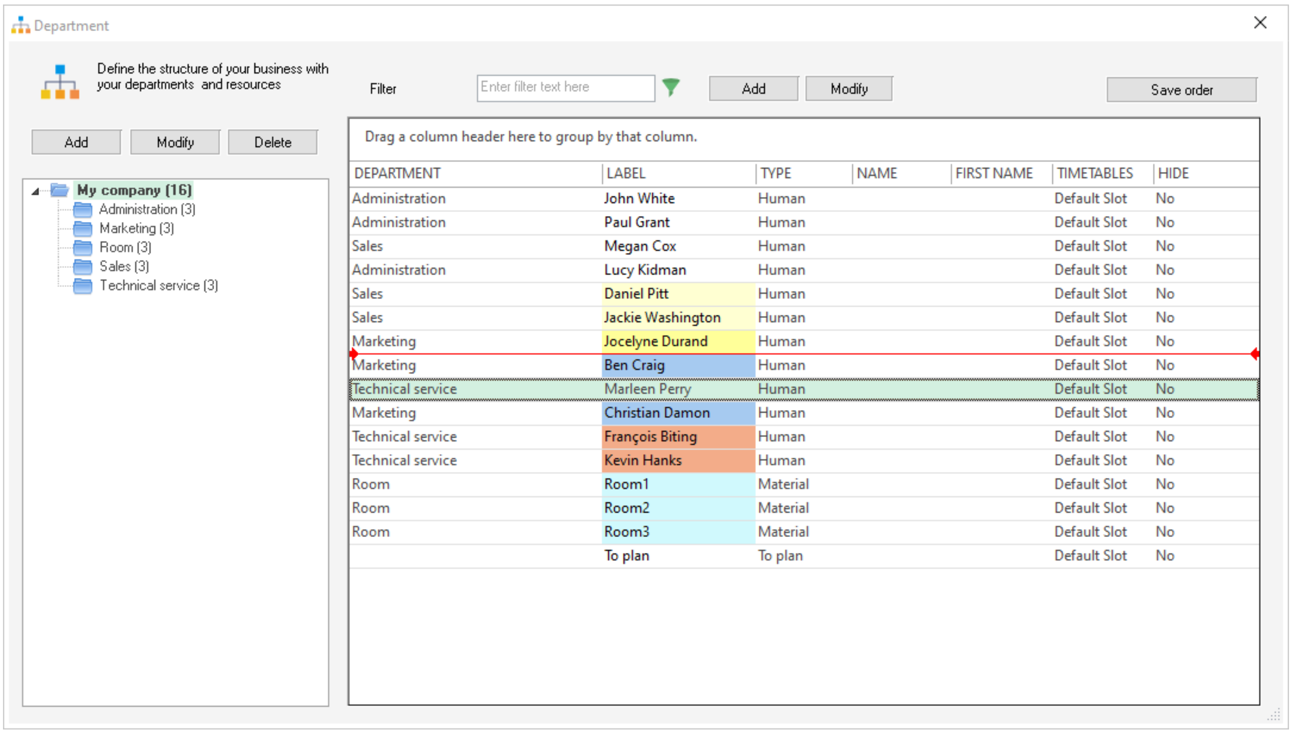

## Resources order by department

### From the menu Data -> Department

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

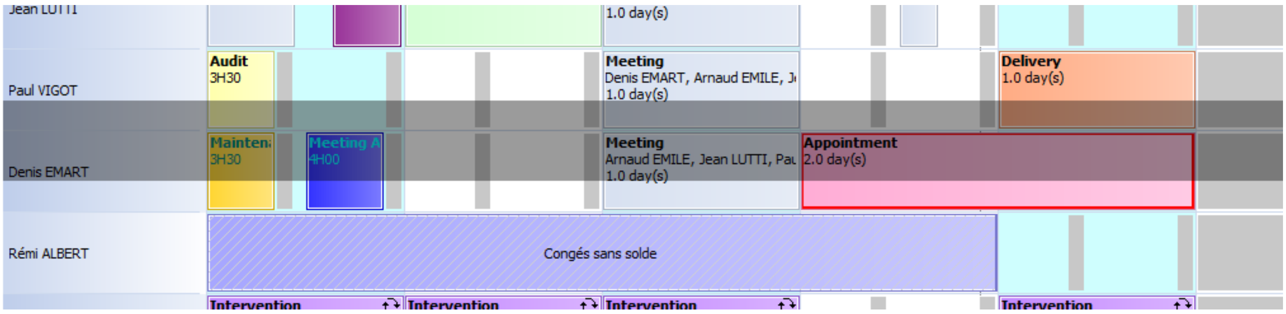
The order is different for each department.

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




### Drag and Drop from the screen

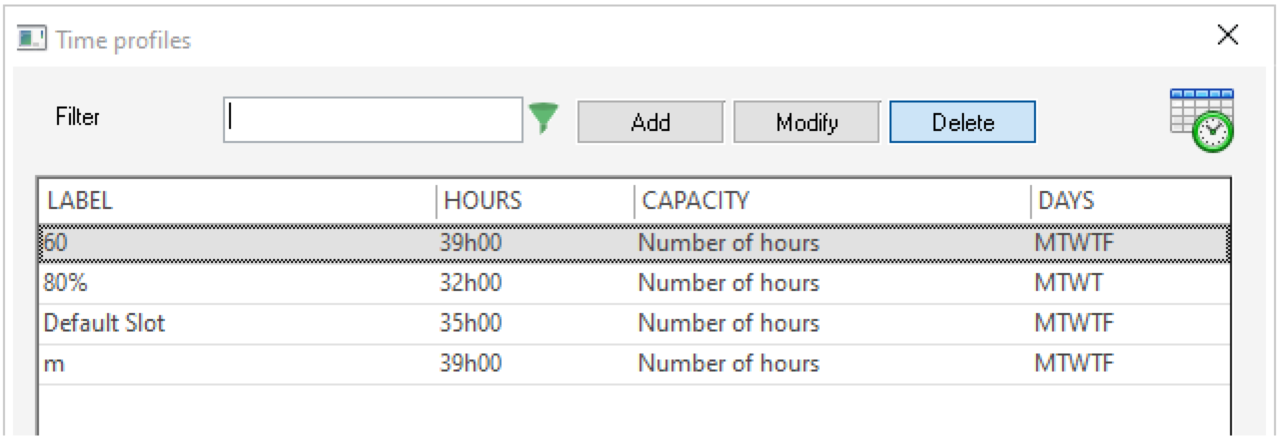
You can also change the order of your resources directly on the screen.




## Time Profiles

### Create time profile

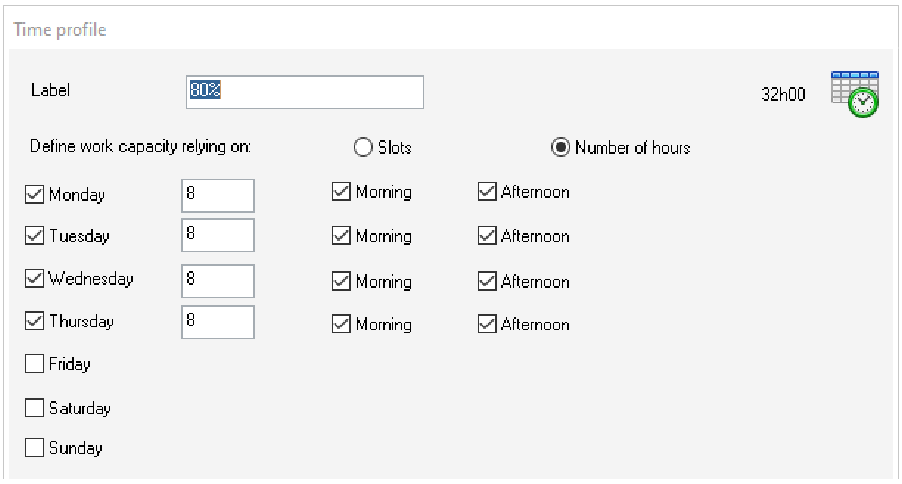
Got to the menu Data -> Time profiles.



You can create as many profiles as needed.

Here is the procedure:

- Click on the button « Add »

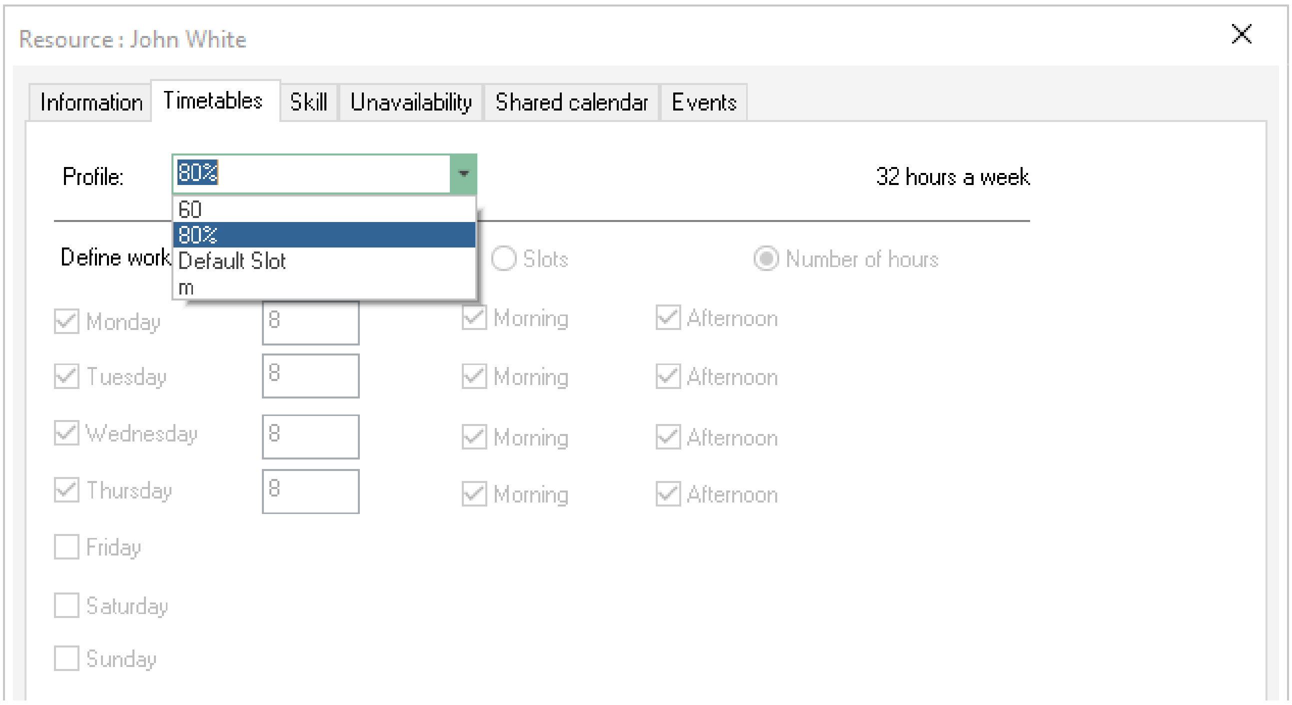



- Enter a name for your new profile and fill in the slots information
- If your employee attendances are the same one week to another, tick on « Define work capacity in function of slots ».
- If your employees working hours change from a week to another, tick on « Define the capacity in function of number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

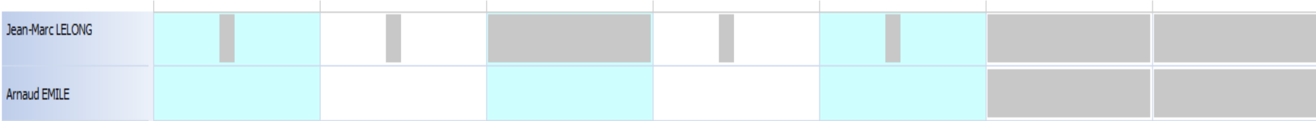
You can create specific weekly slots for each employee.
Visually, on the schedule, greyed days will correspond to non-worked days.

## Assign a time profile to a resource

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



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




## 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.

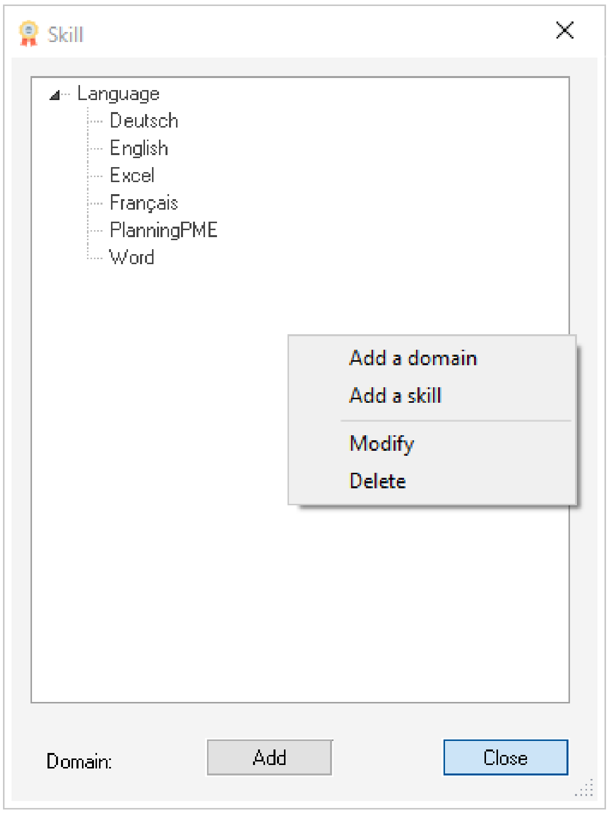
## Skills

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

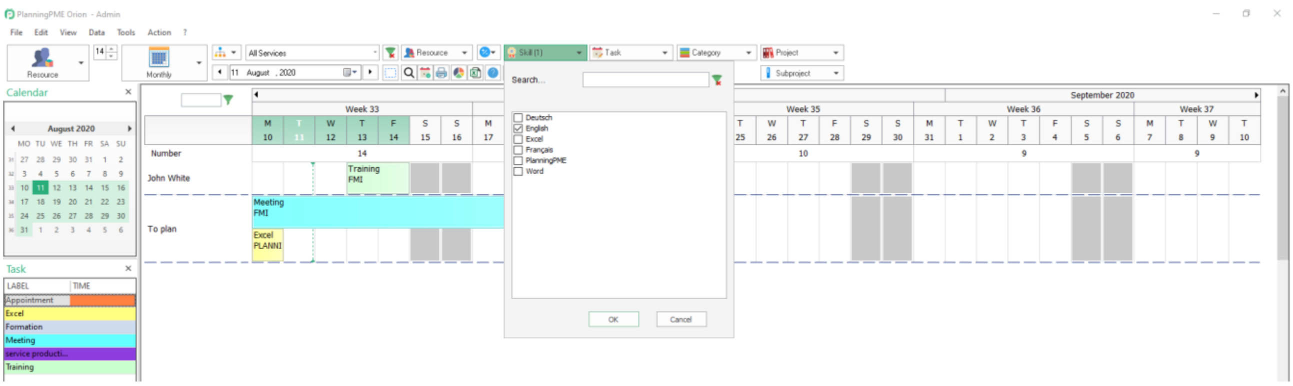
From the menu "Data" -> "Task", open the task card and assign skills clicking on the button "Assign.

## 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

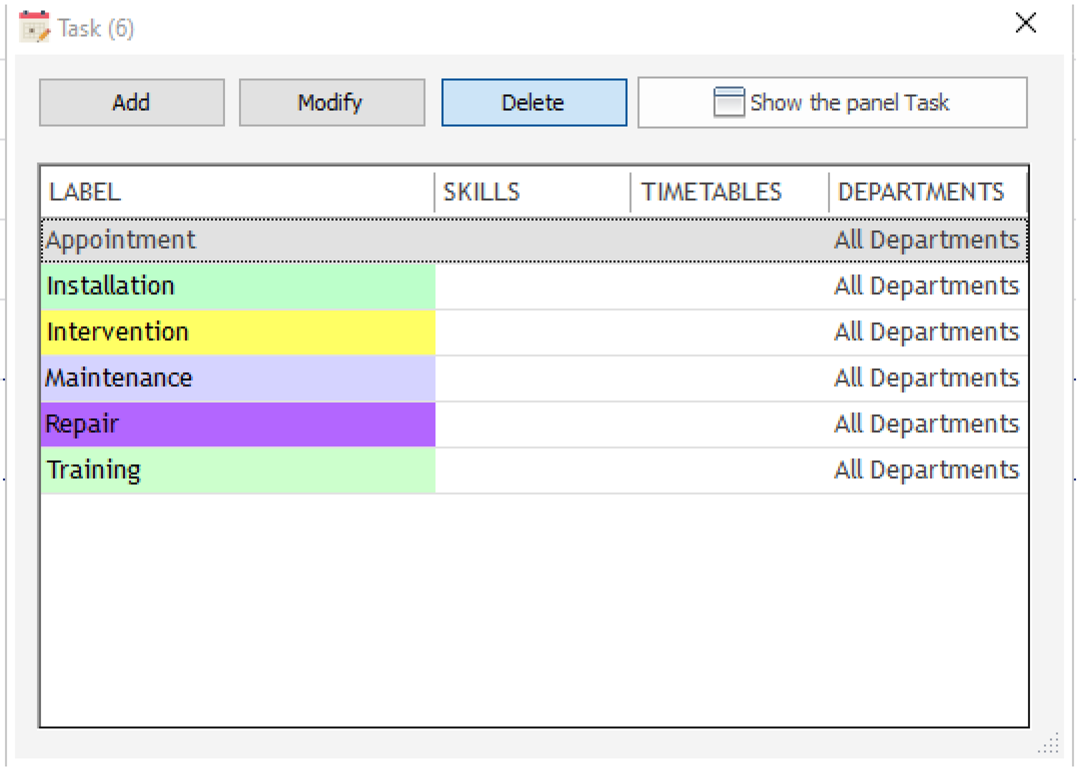
To extract from the schedule skilled resources, you can play with the filter "Skill" at the top left side of your screen.



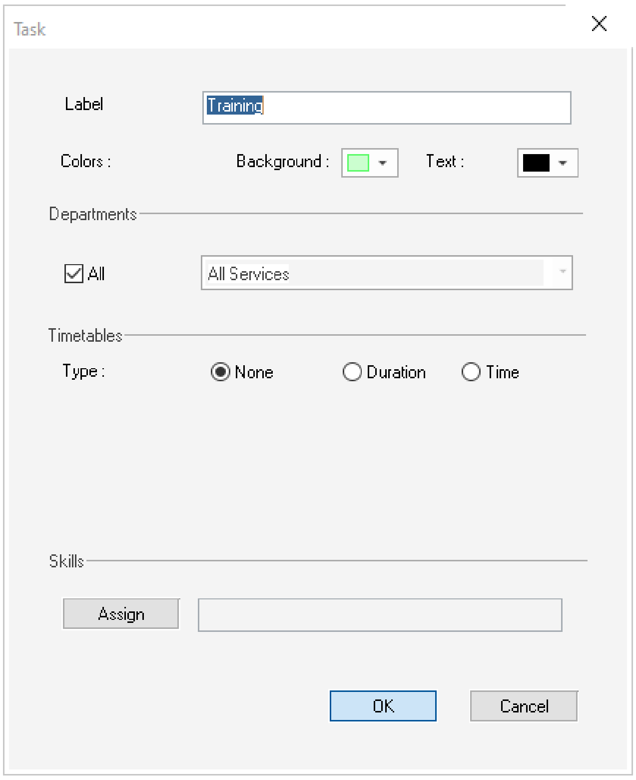
## Tasks list

### 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.



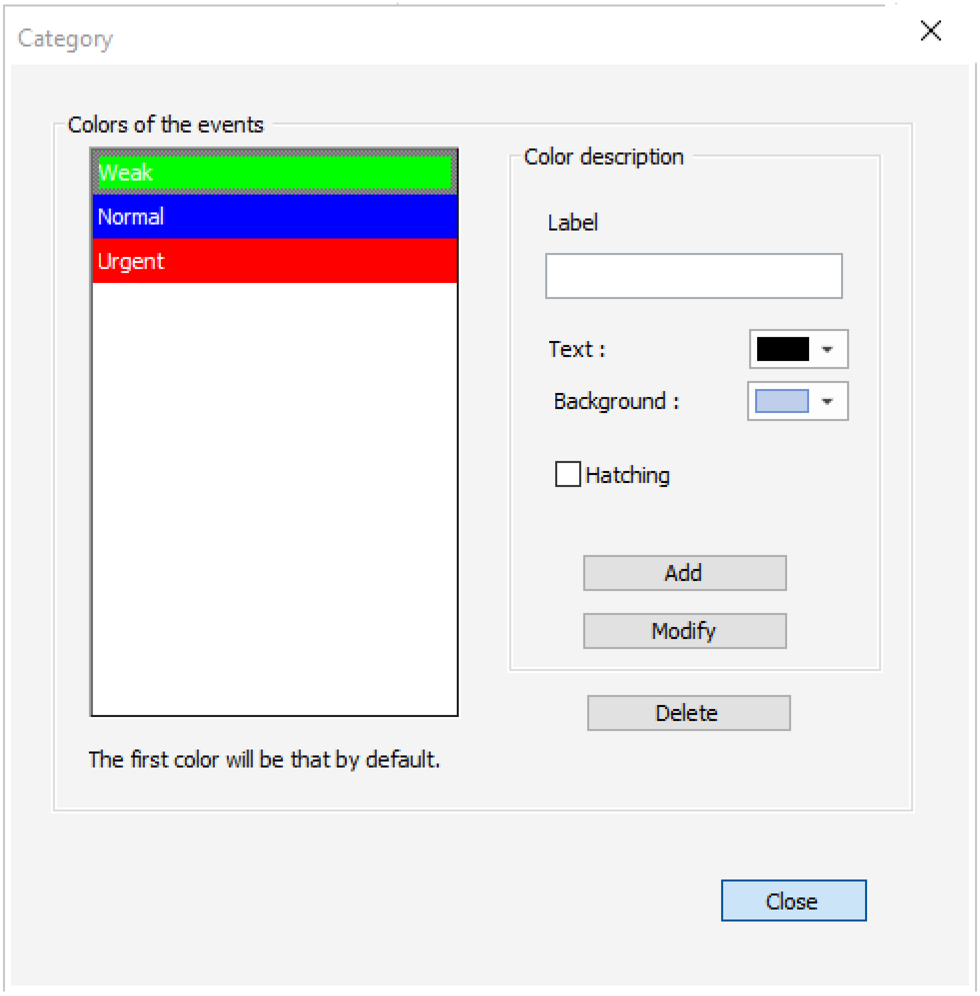
Then, you have several options available to customize your tasks.
- Define the label
- Change the text and background colors
- Assign to specific departments
- Assign hours
- Assign skills

## 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"

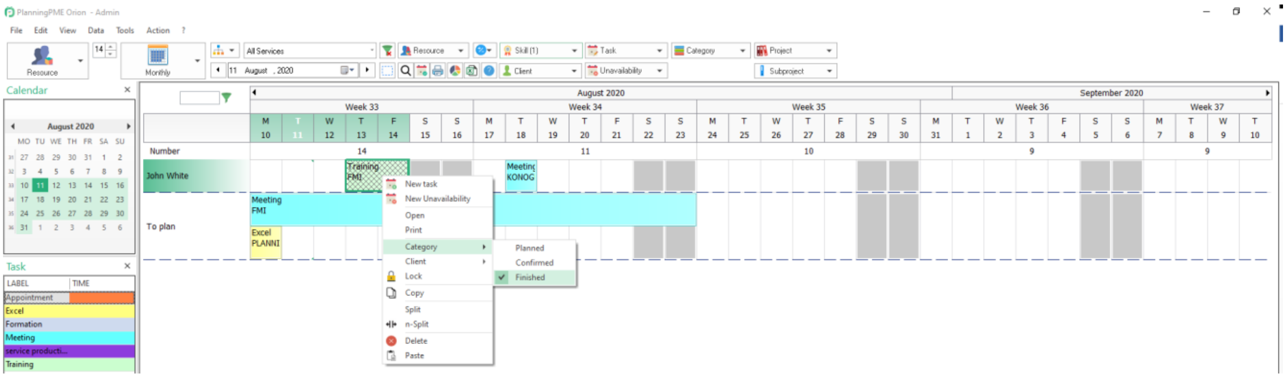



To add a category, type a label, then select the text and background colors and press the button “Add”. You can also select **hatching for the category.**

**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.

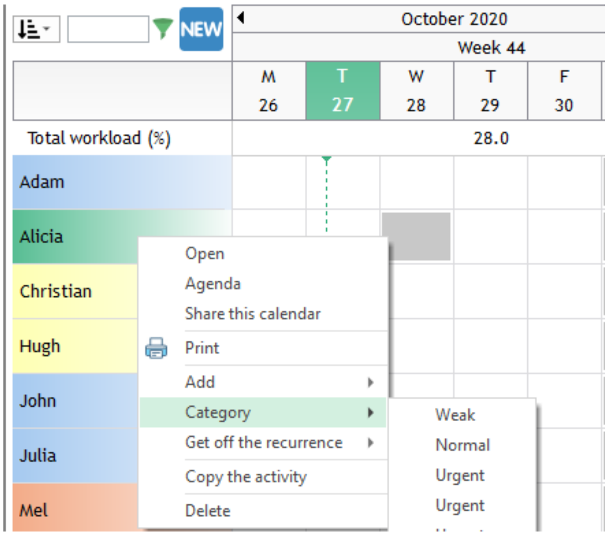
## Assign a category to an event

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.

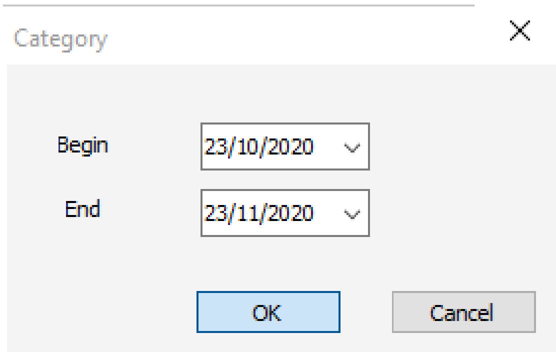


## Fast change of the category for several events of one resource

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:


Here, you have a double information: The color is the color selected for the task label and the haching 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.

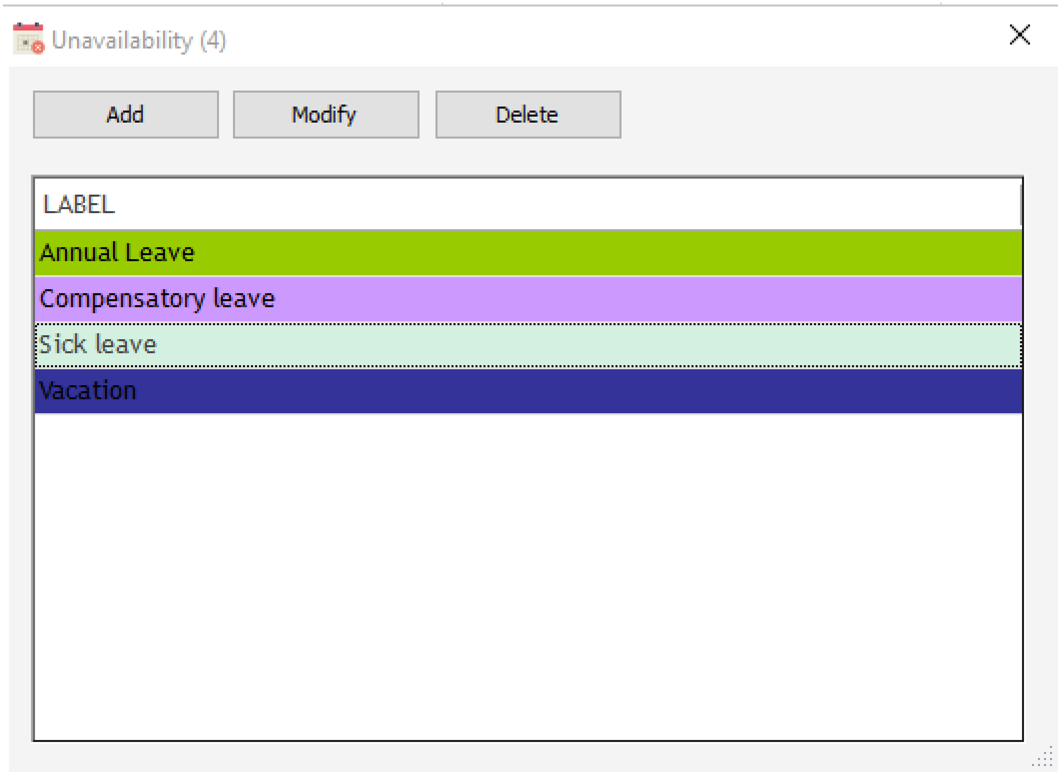
## Unavailabilities list: Absences, vacations, leaves

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 unavailibilities list

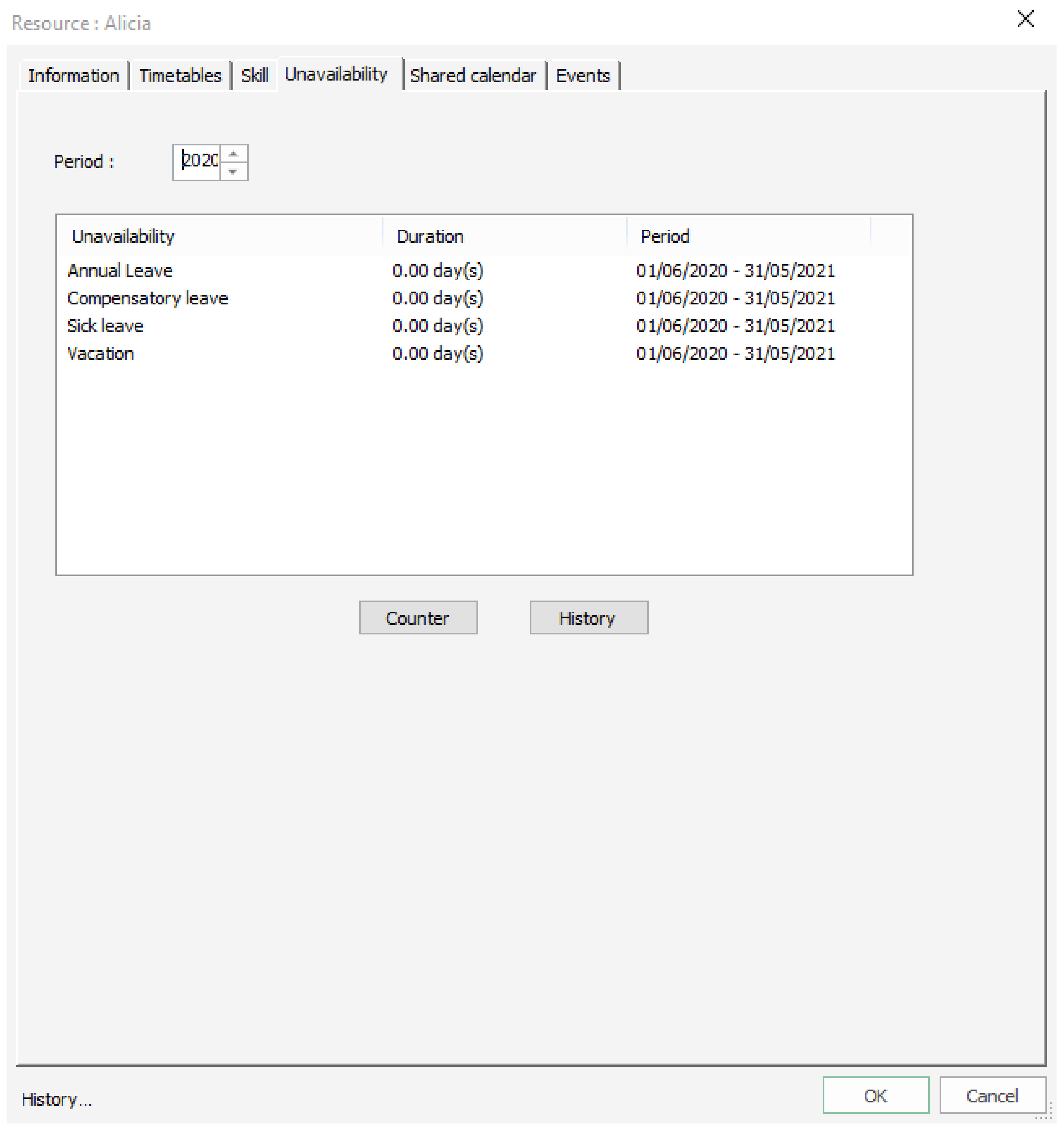
From PlanningPME, go to the menu “Data” -> “Unavailability”
Click on the button « Add », select  the label of your unavailability the color and save it.



## 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:

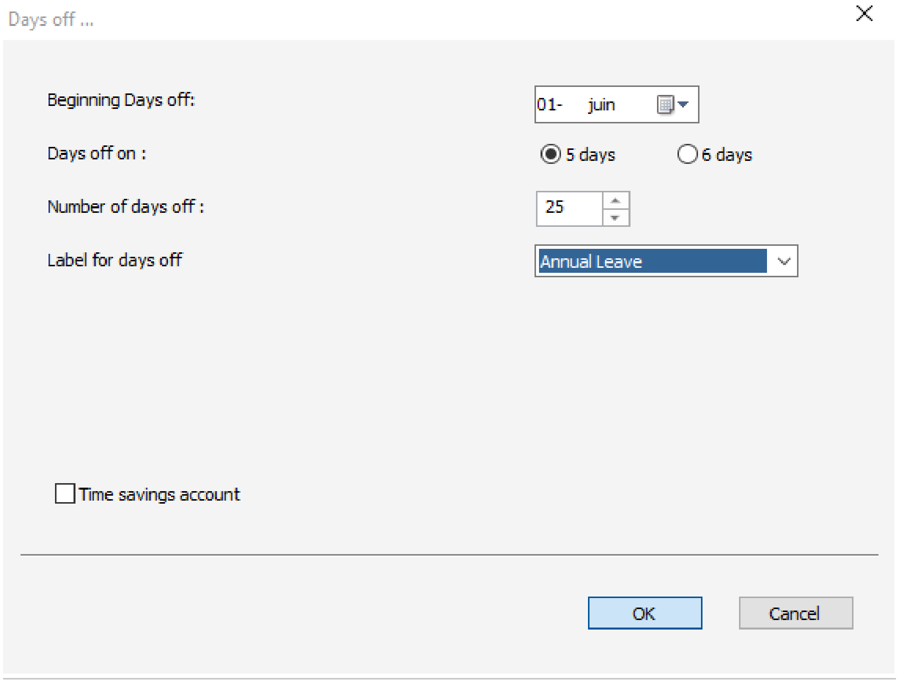



To know exactly when your employees were off, click on the line and select button “History”.

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.




**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 :

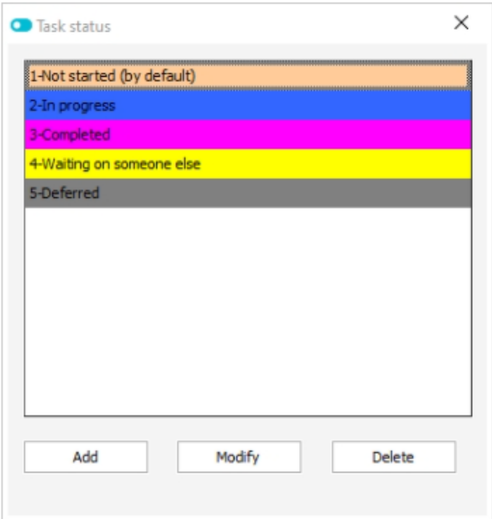
- Activate the status for the tasks

- Activate the status for the unavailabilities

## Customize your status list

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

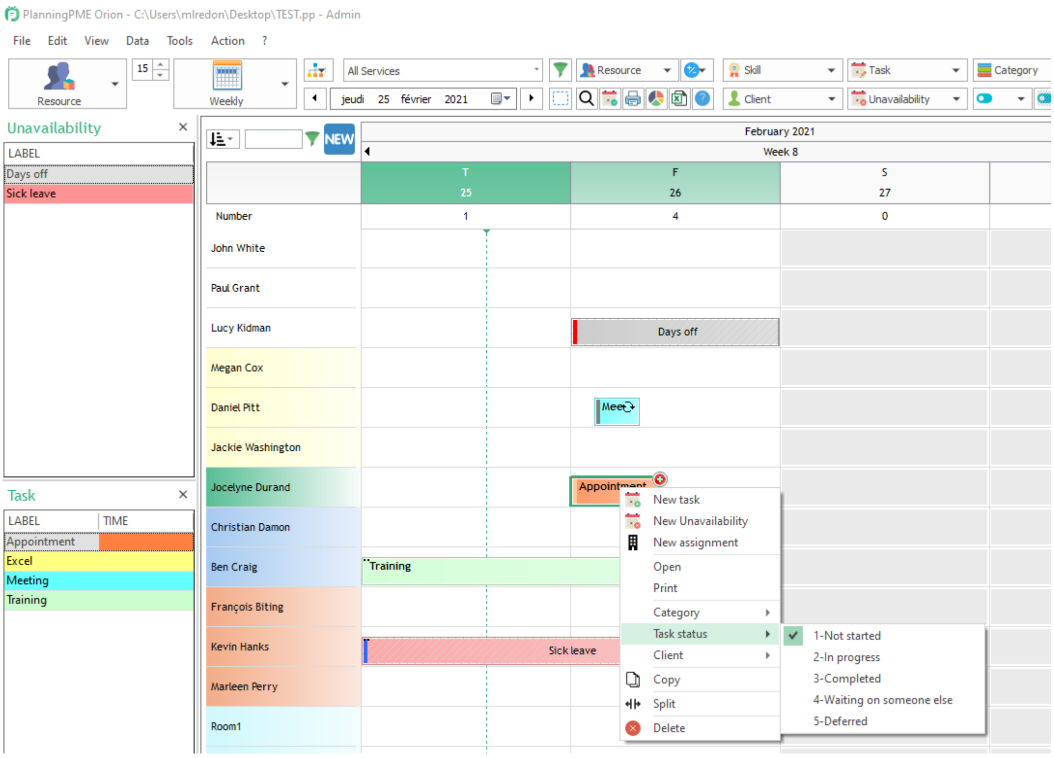
- Task status: customize your status list for the event such as "Tasks"
- Unavailability status: customize your status list for the events such as "Unavailabilities"




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

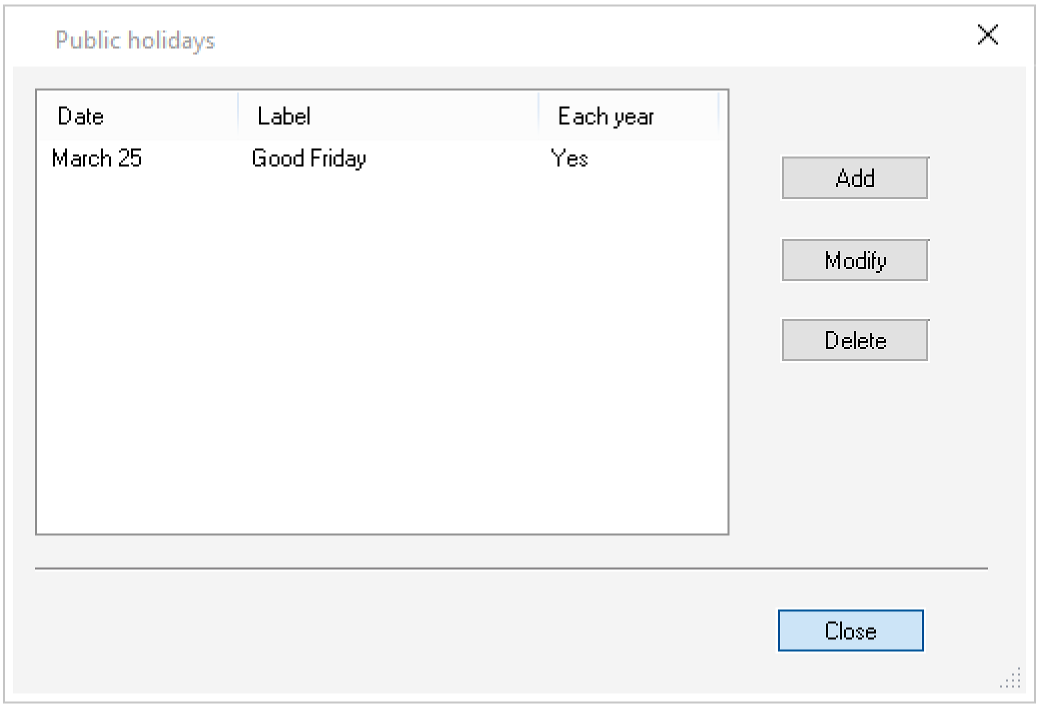
Refer to the Rights Management chapter

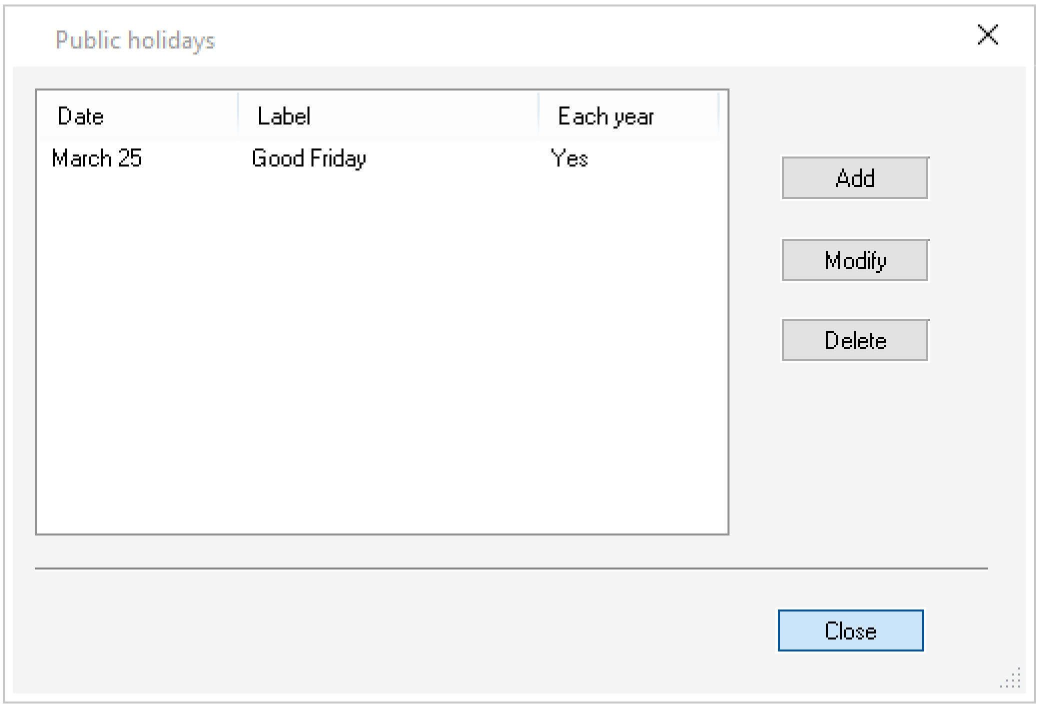
### Rename "Task status" and « Unavailability status » with your own words

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






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

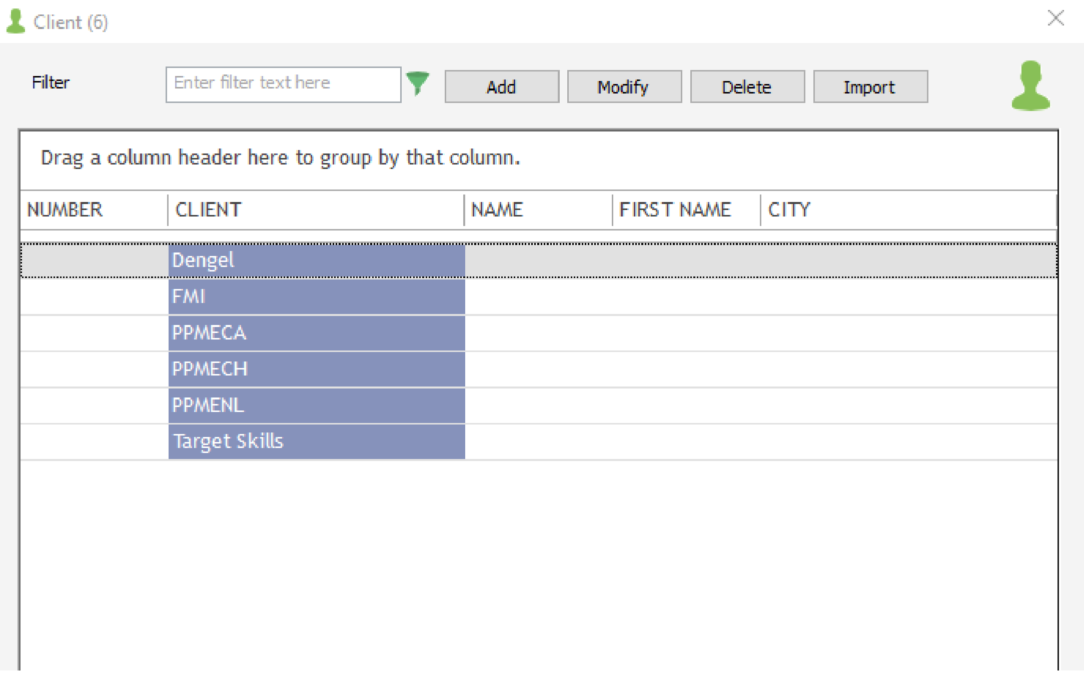
You can manage your clients within PlanningPME. The number of clients is not limited.

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.

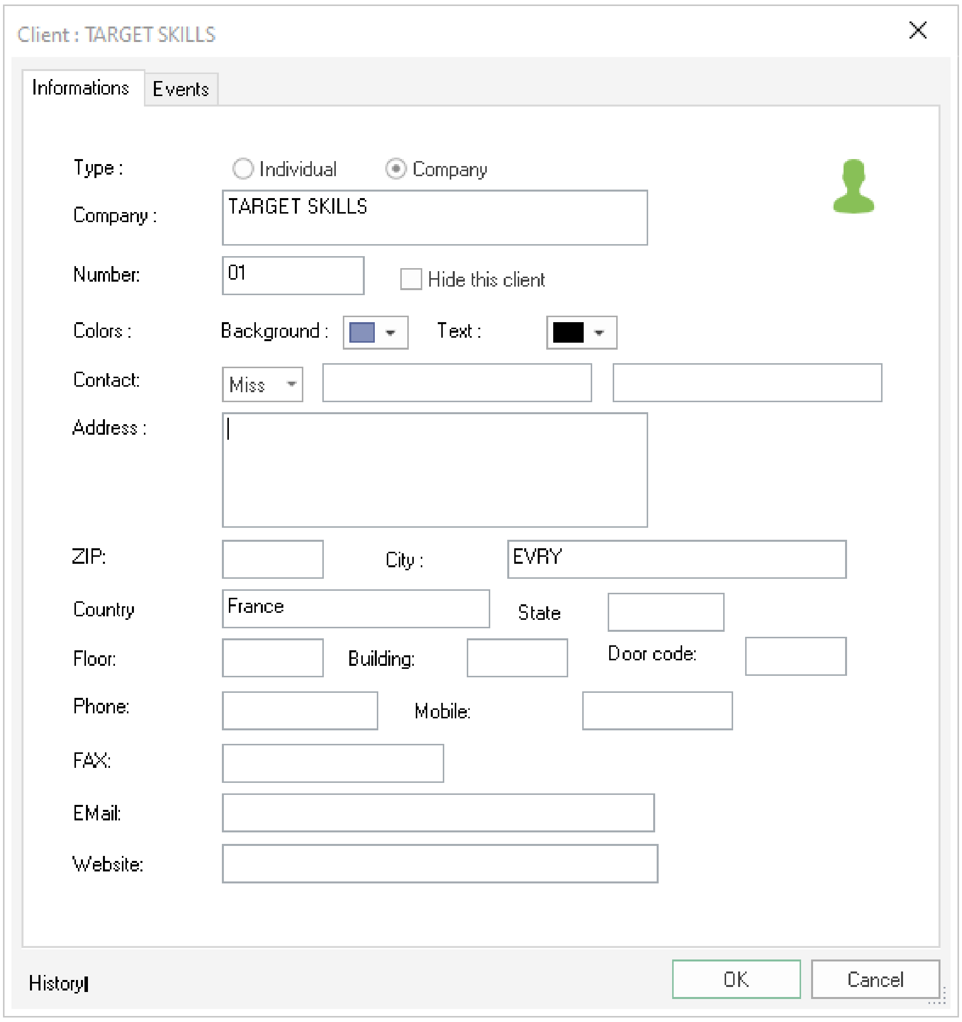
### Activation of the option

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




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:



### 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

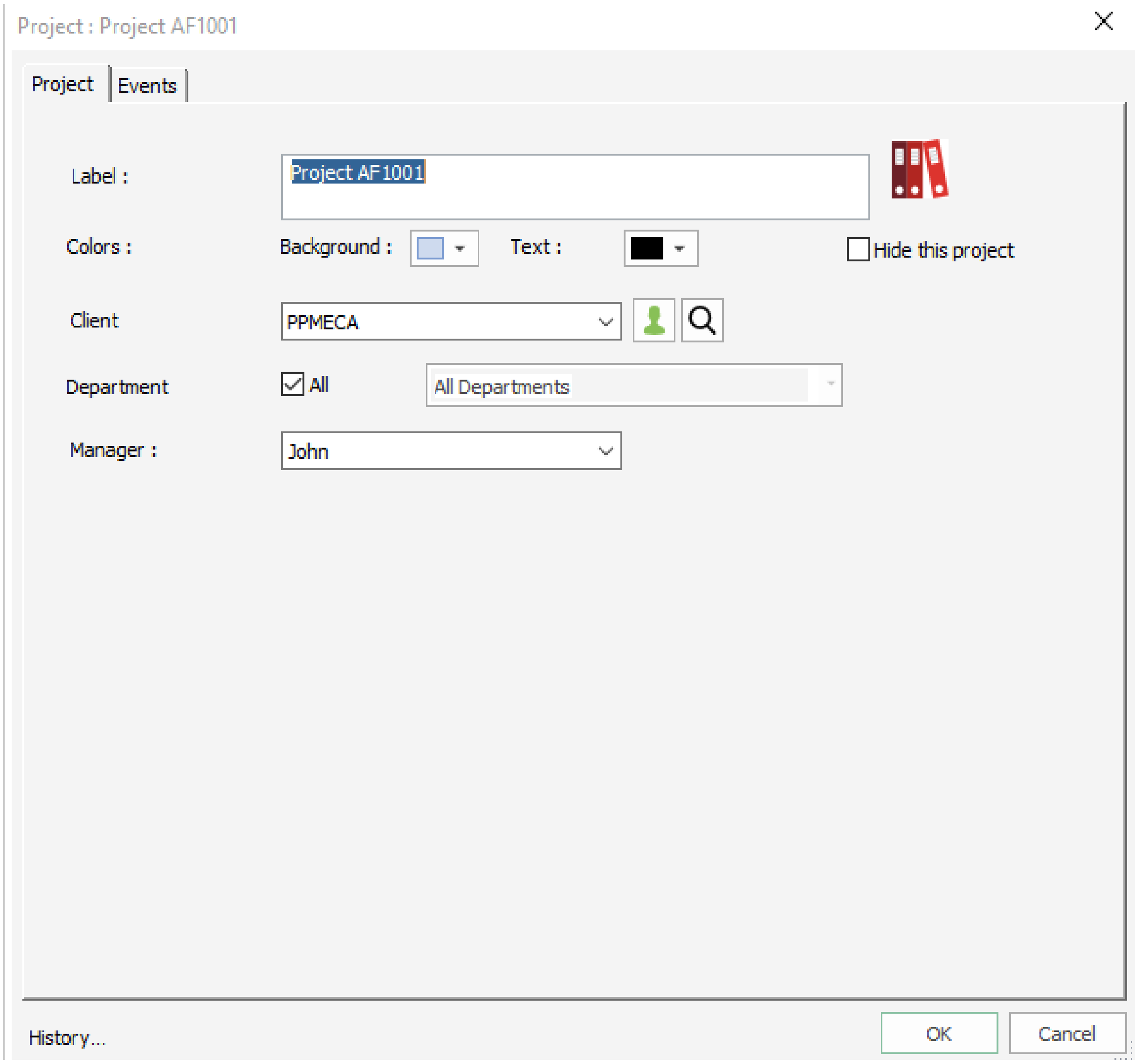
With PlanningPME, you can manage your projects and if needed, your subprojects specifying for each event the associated project.

### Activation of the option Project

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

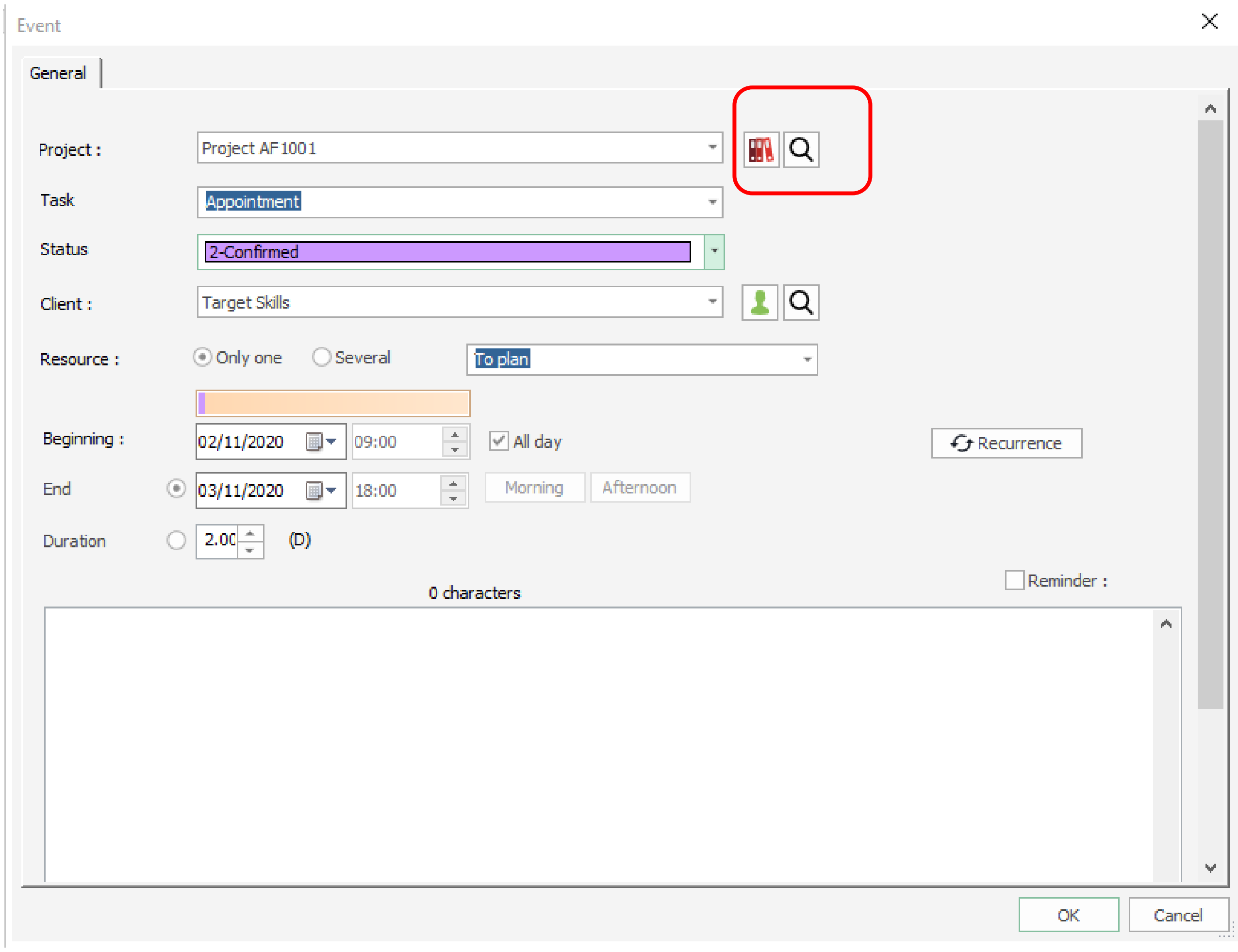
### Add, modify and delete projects

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:



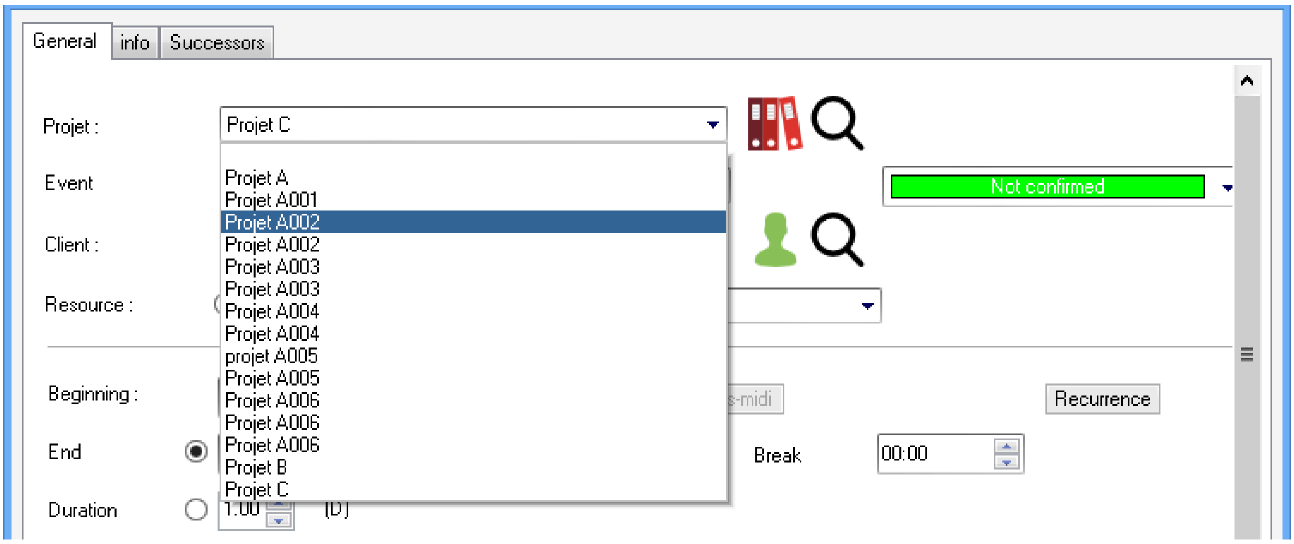

**From the "Project" icon within the event window**

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




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

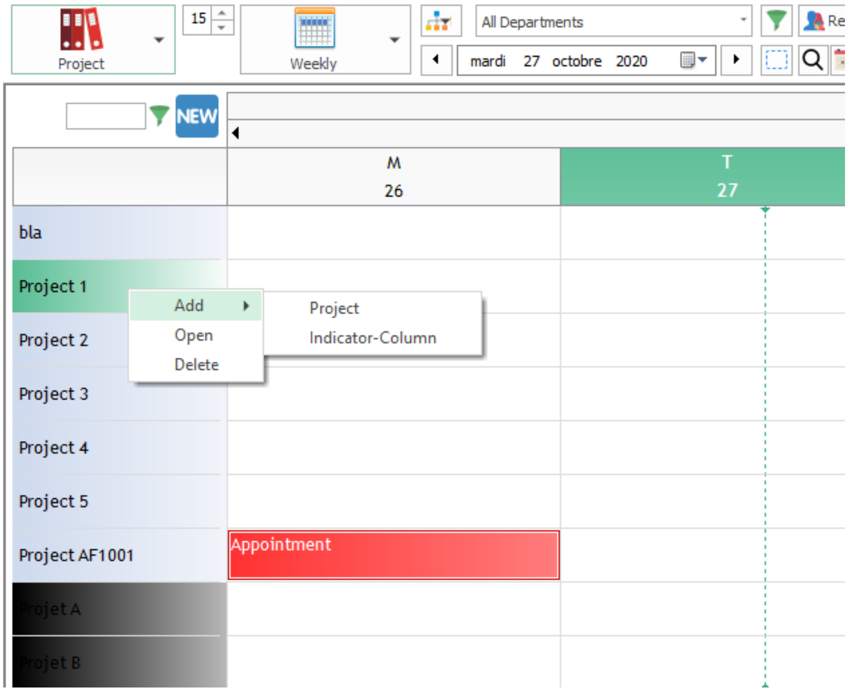
The project card will then open and you can create a new project. This project will be added on your list of projects and you will be able to select this project directly next time:




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».

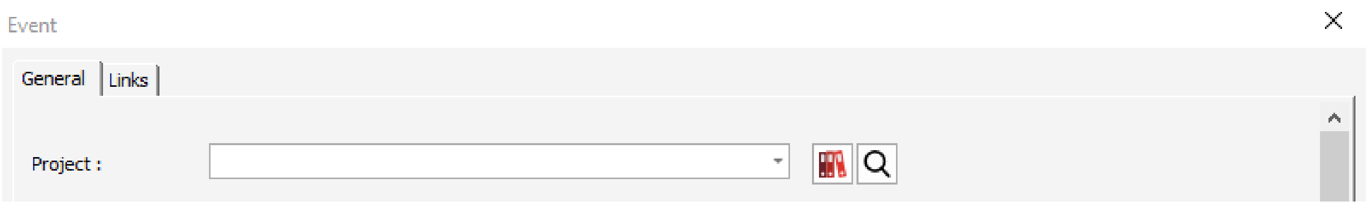



You can also open the card of your project and delete it from here.

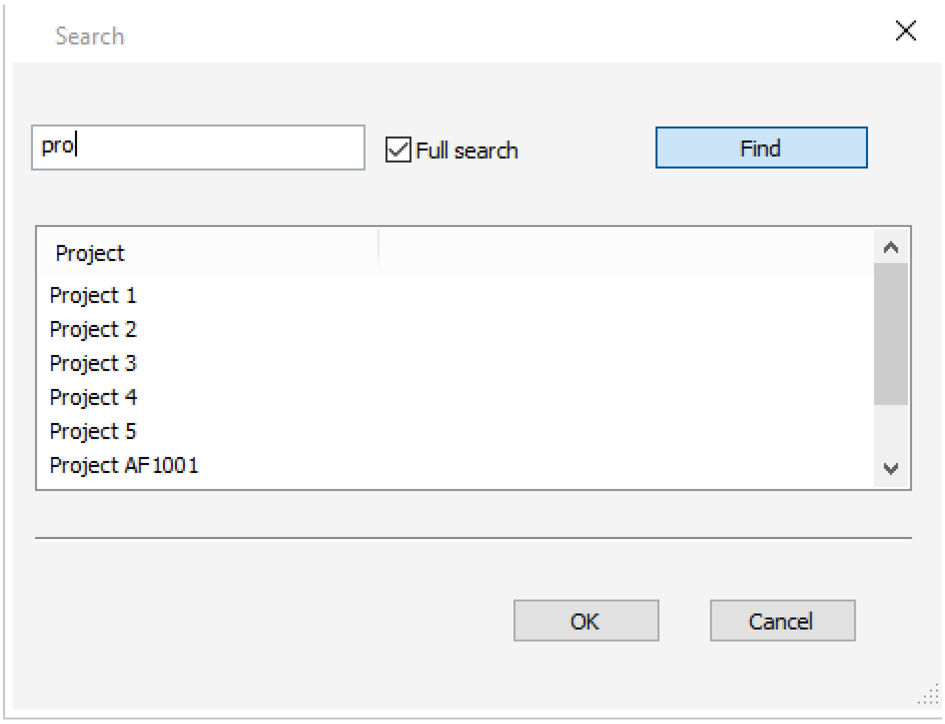
## Search for a project

### 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:



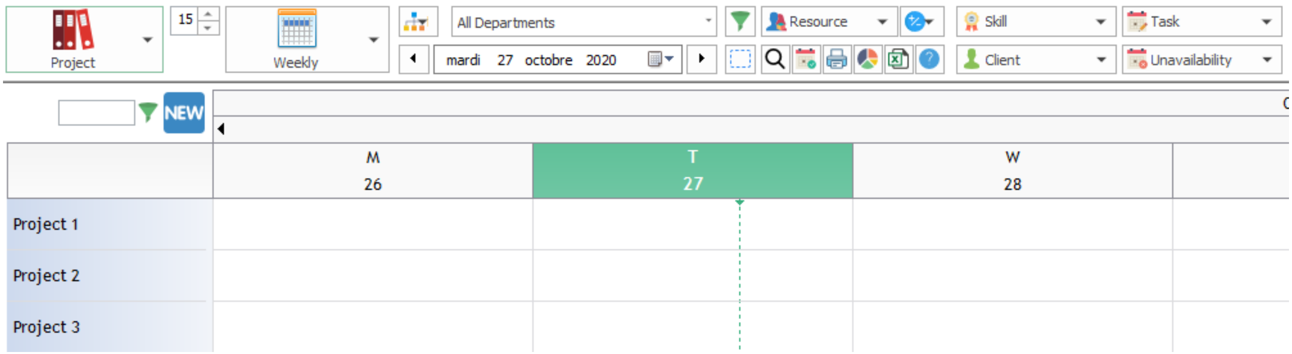

Clicking on the “glass” icon, you will then have this search window:




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

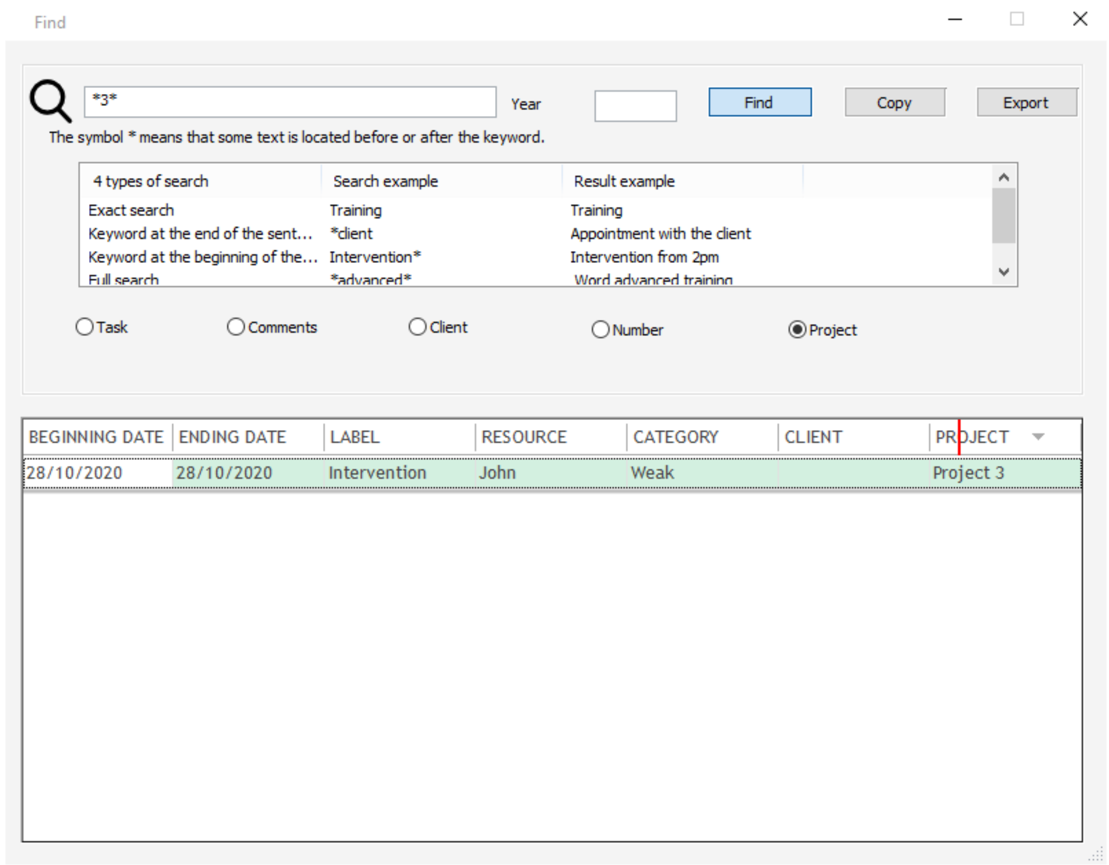
### Search from the project view

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



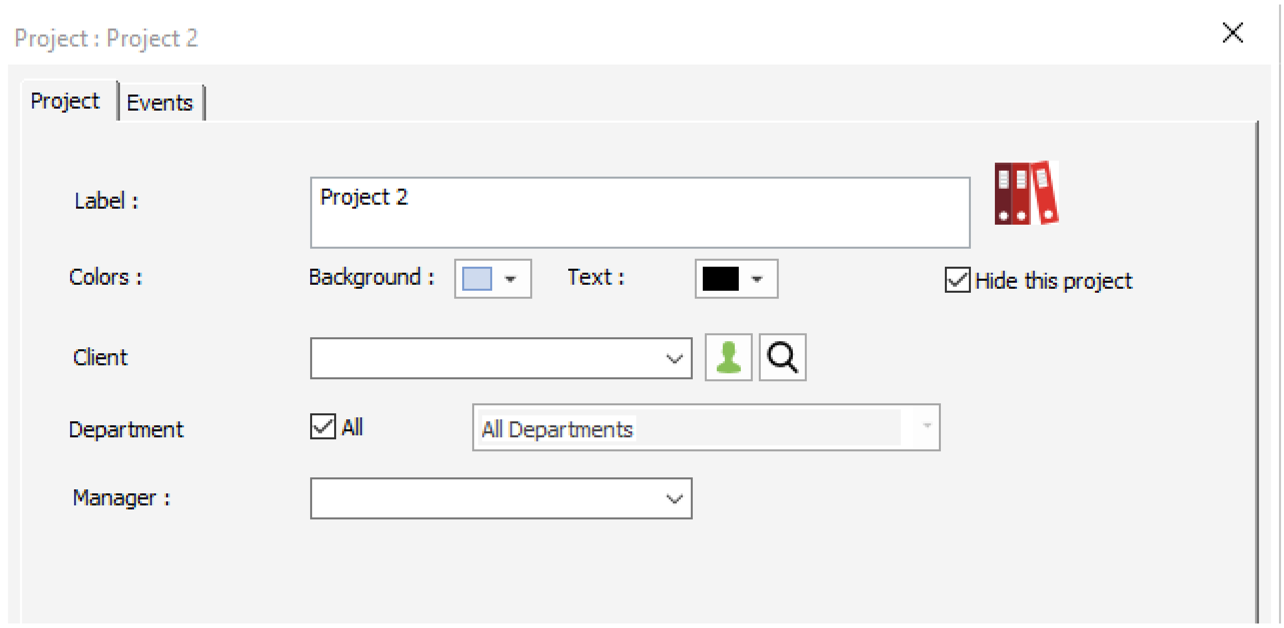
### Search from search window (Edit -> Search or CTRL + F)

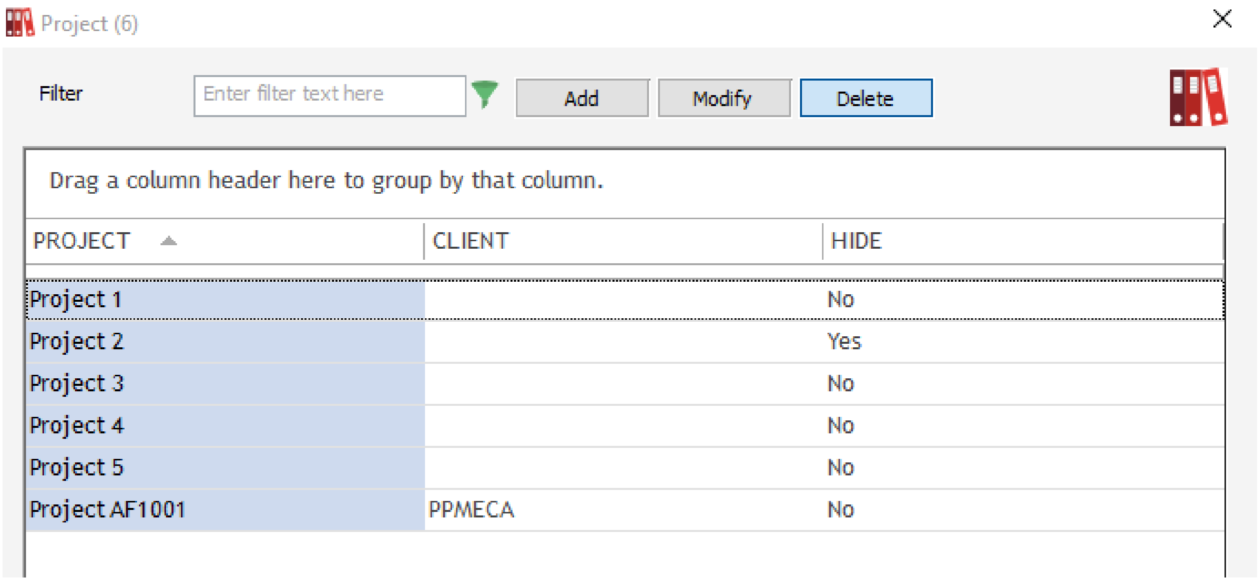
Type a part of the name of your project and all the events will be listed:




### 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 ».



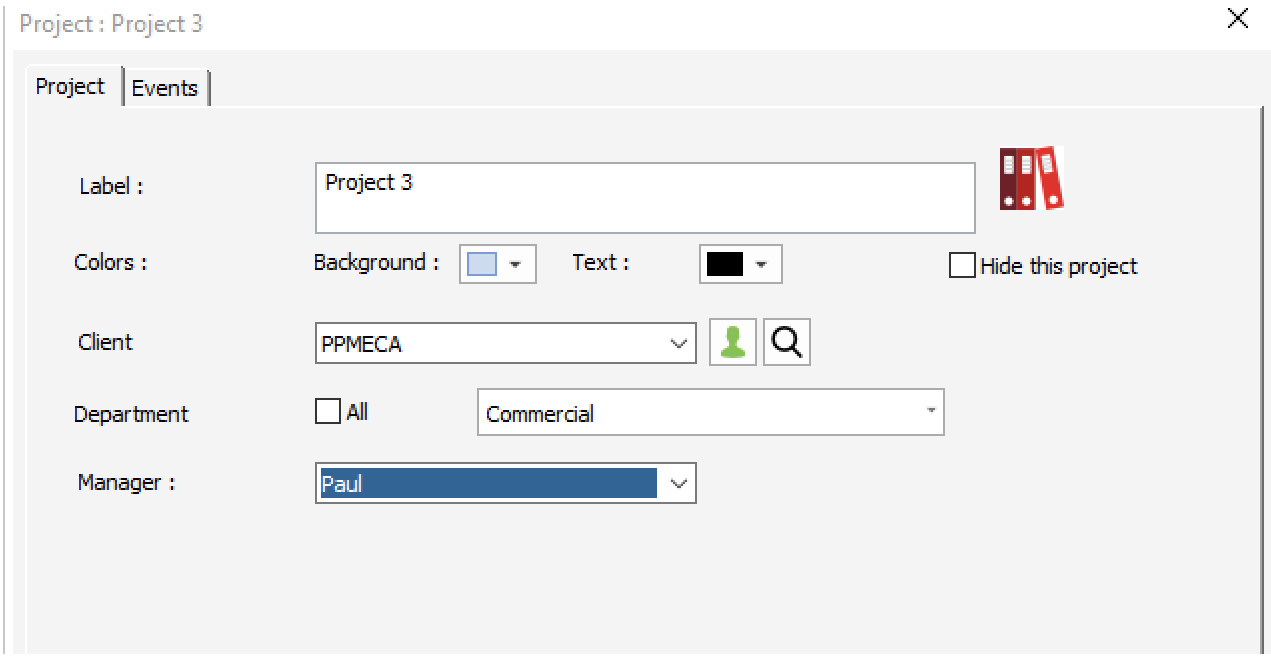



### Delete several projects

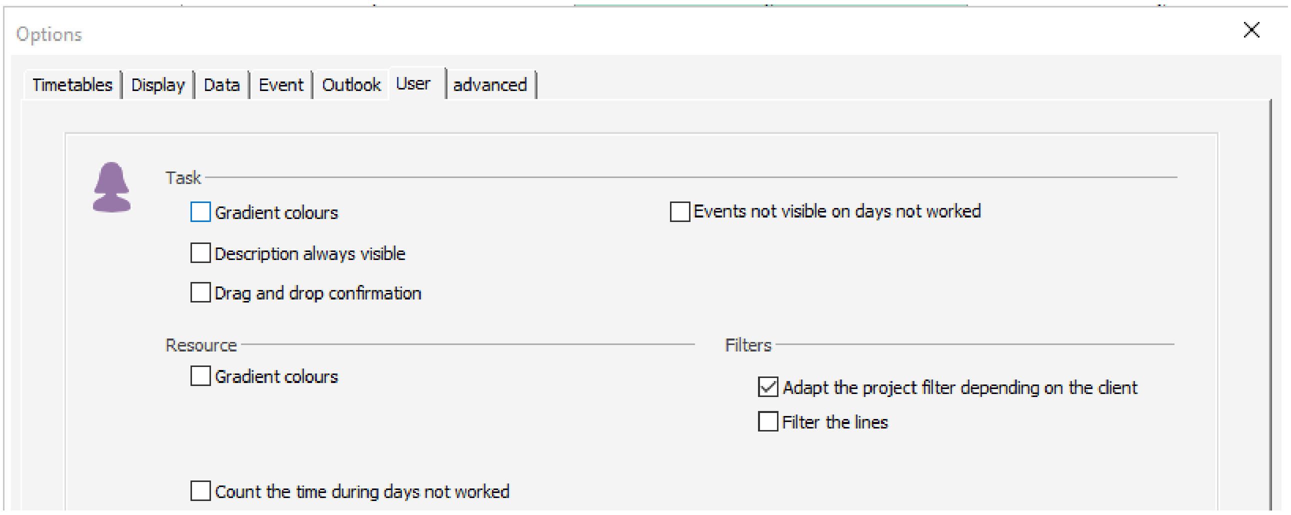
You can delete several items from the menu Data, with the keys CTRL + DEL
You will have a message asking you if you want to delete the items.

### 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:




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




### Results when filtering by client

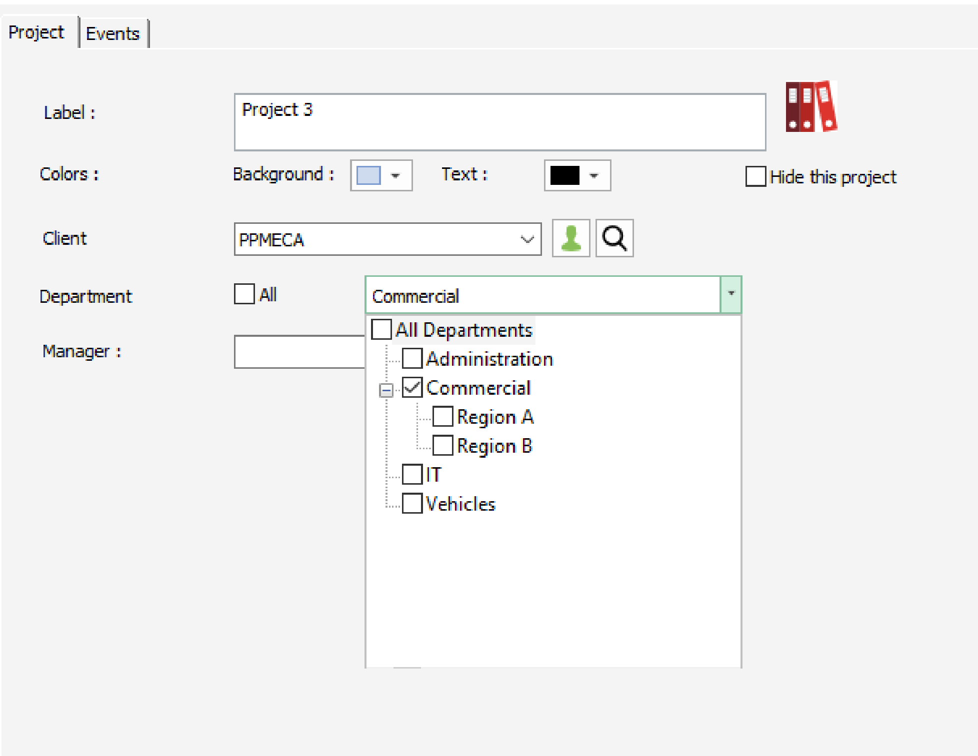
While filtering by client, only projects associated to this client will appear on the project filter.

### Results while creating a new event

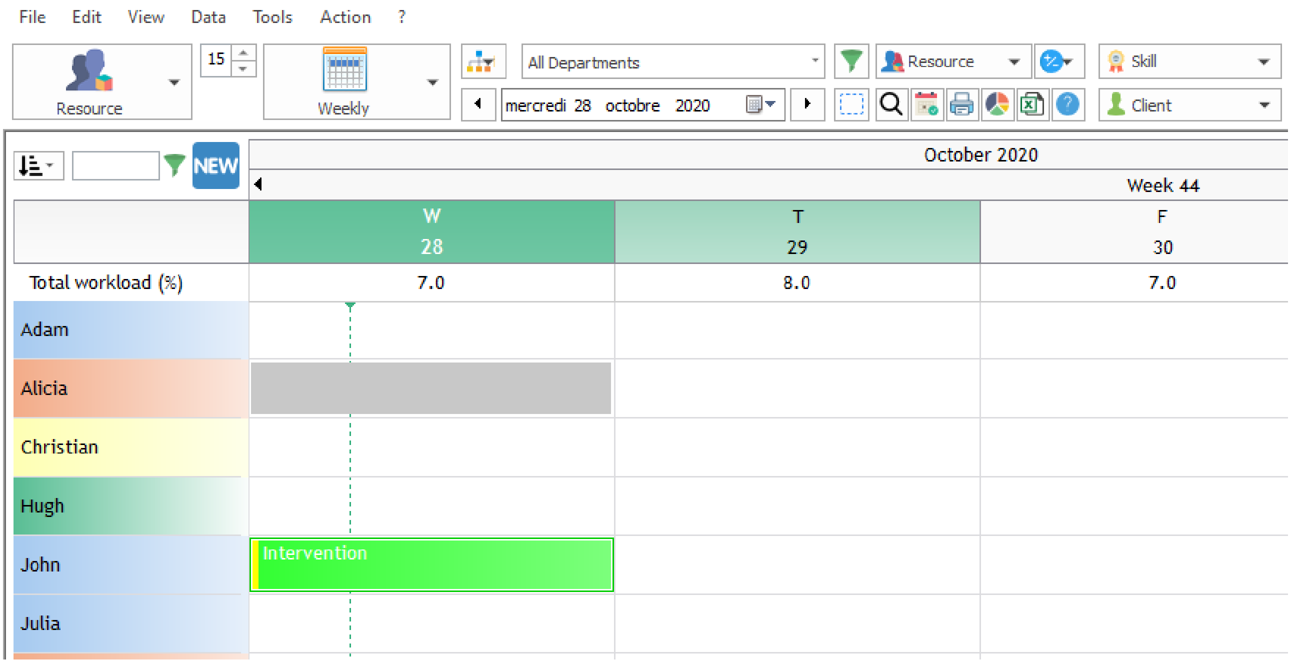
If you select one client first, projects associated to this client will appear on the project list.
If you select a project first, the client will be selected by default on the client list.

## From Version 4.1. Assign your projects to a department

It is possible to assign a project to a department.

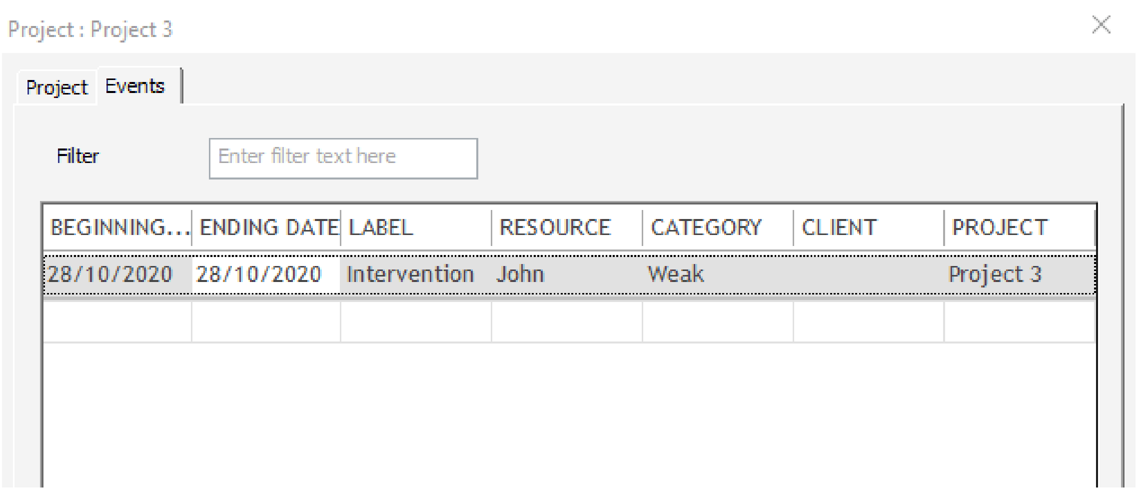



Then, when filtering by department, only projects associated to this department will be displayed on the drop-down list.




## Tab Events: follow up of events allocated to a project

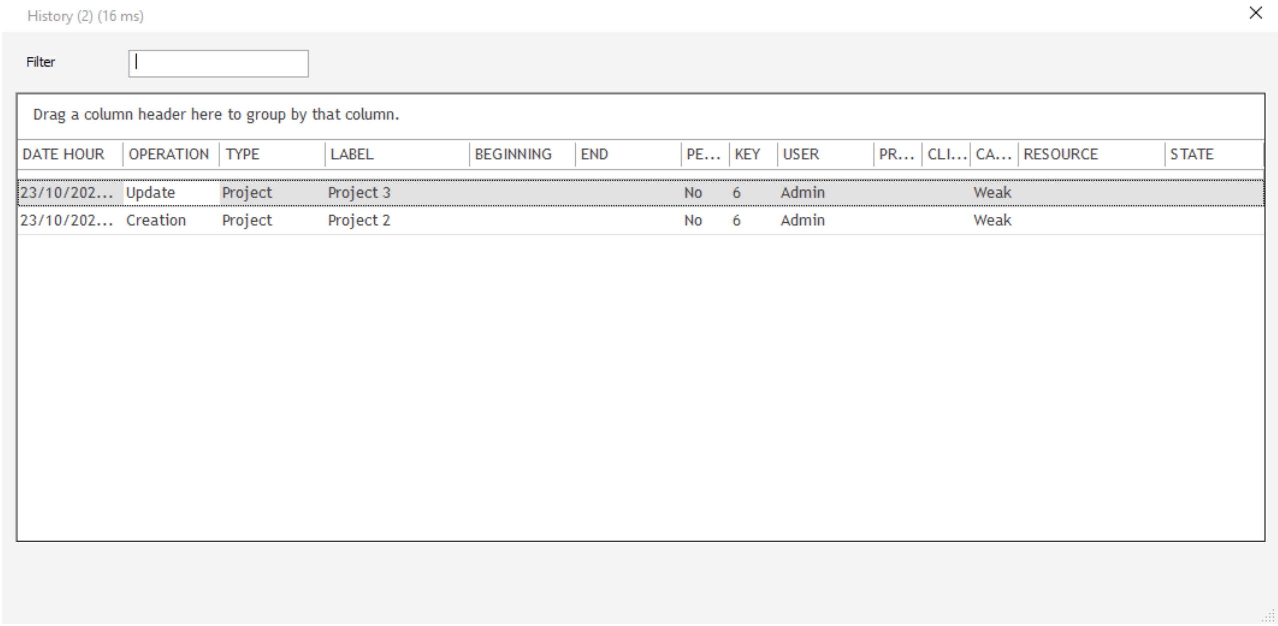
From the project card, you have a tab “Events” that lists all the past and future events allocated to this project.



## 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:




## 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

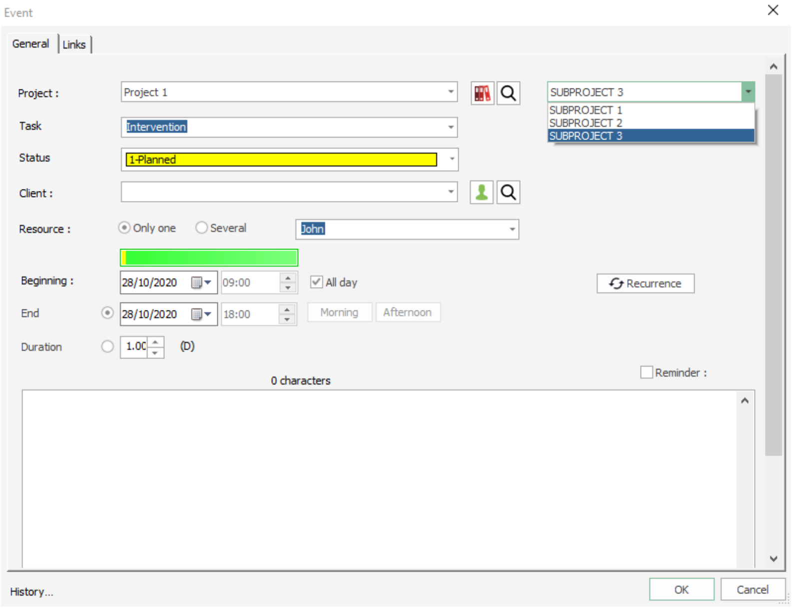

### Add a subproject

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


Project : Project 1
Project
Events
Subproject
Subproject
SUBPROJECT 1
SUBPROJECT 2
SUBPROJECT 3

### 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.

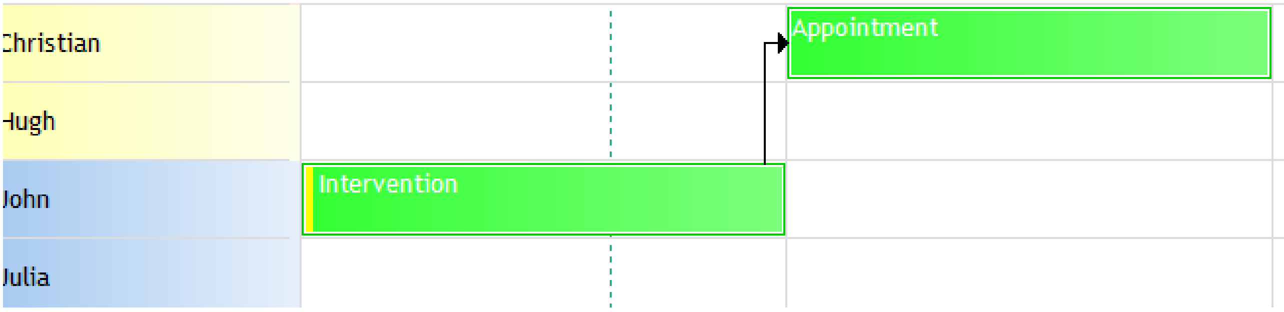
You can create additional fields on the Project window. Check chapter on Additional fields' creation.

### 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.



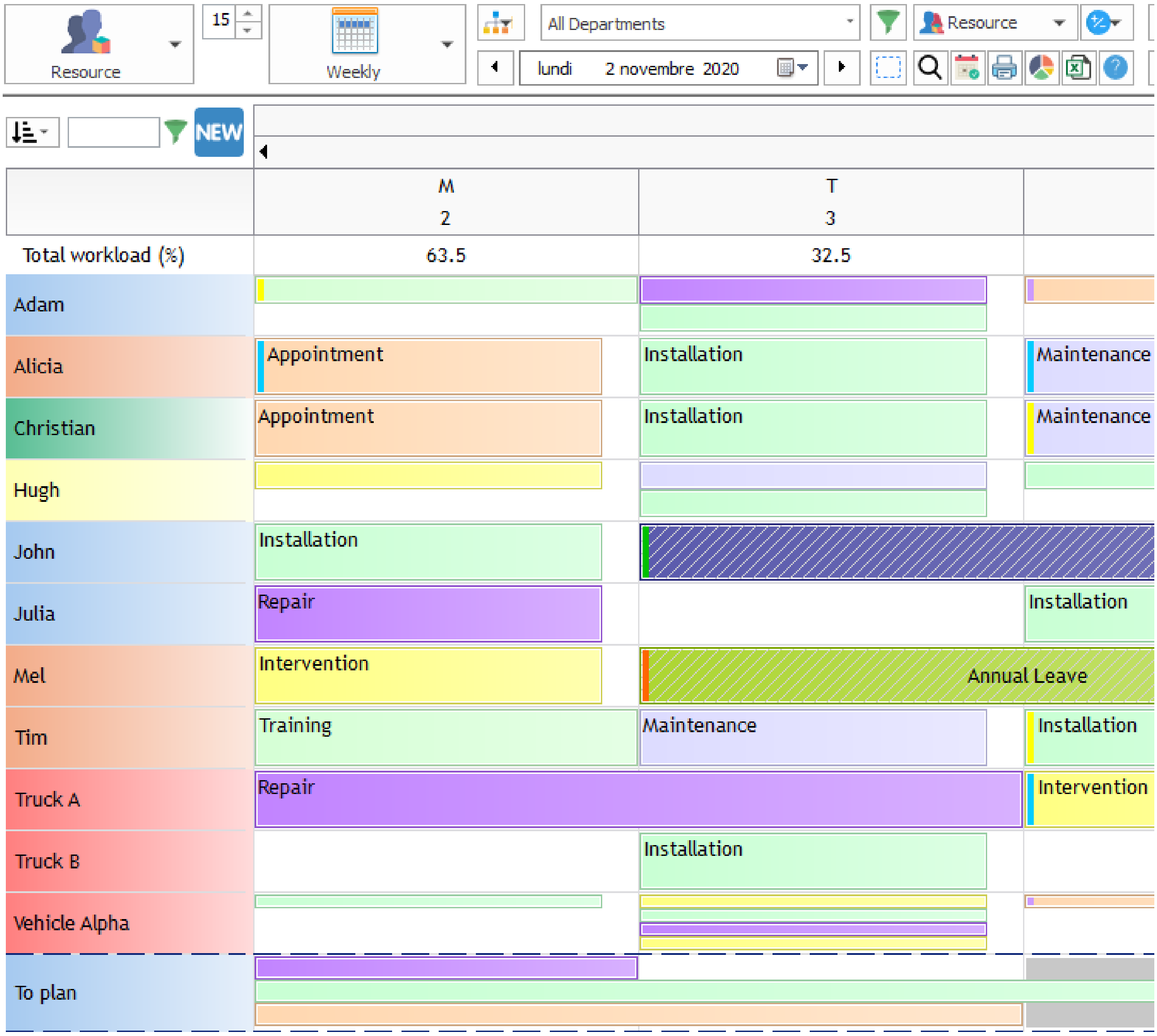

Read chapter on events dependencies to know more.

# 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.

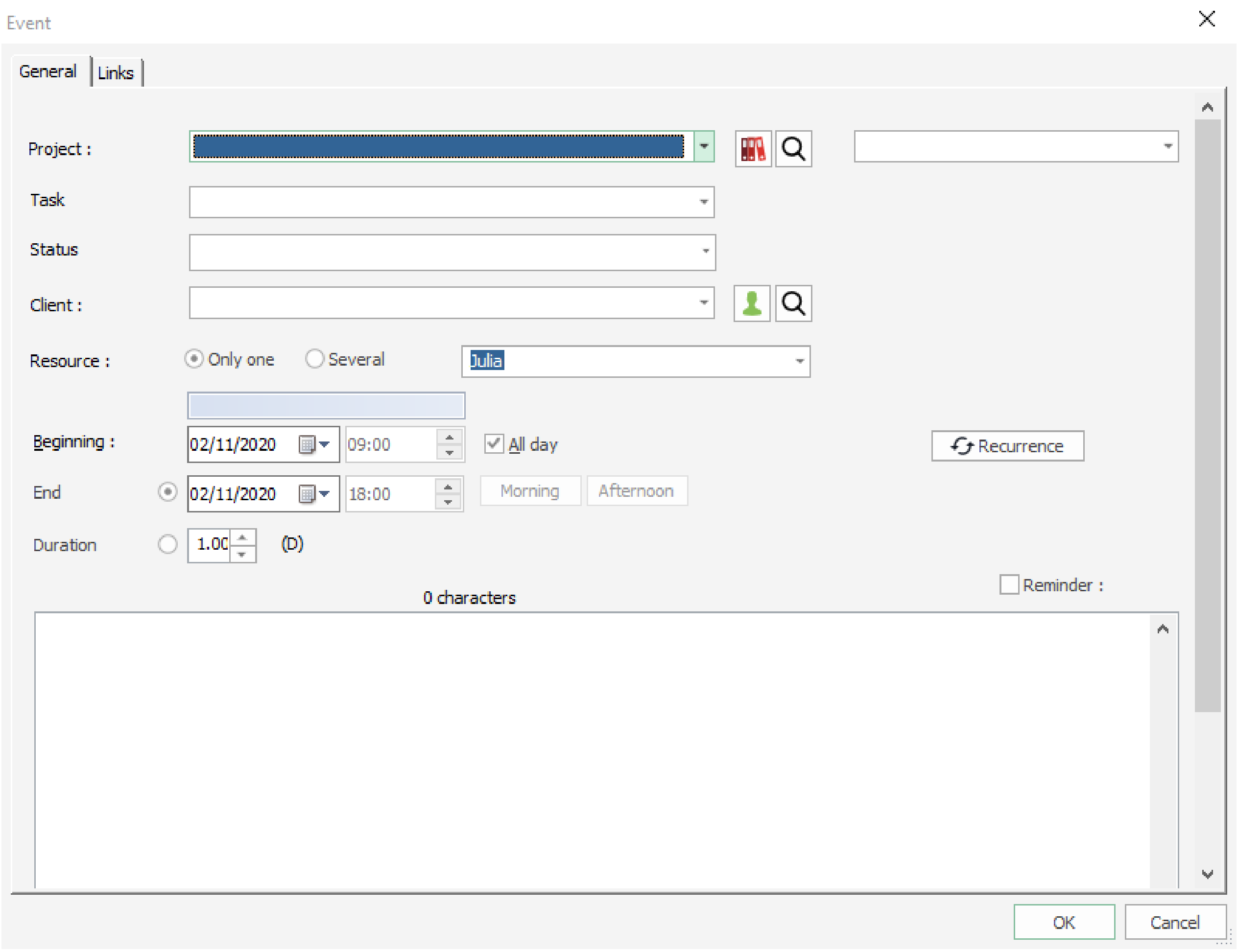
### Via a right click

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

### Go to the menu Action -> Task

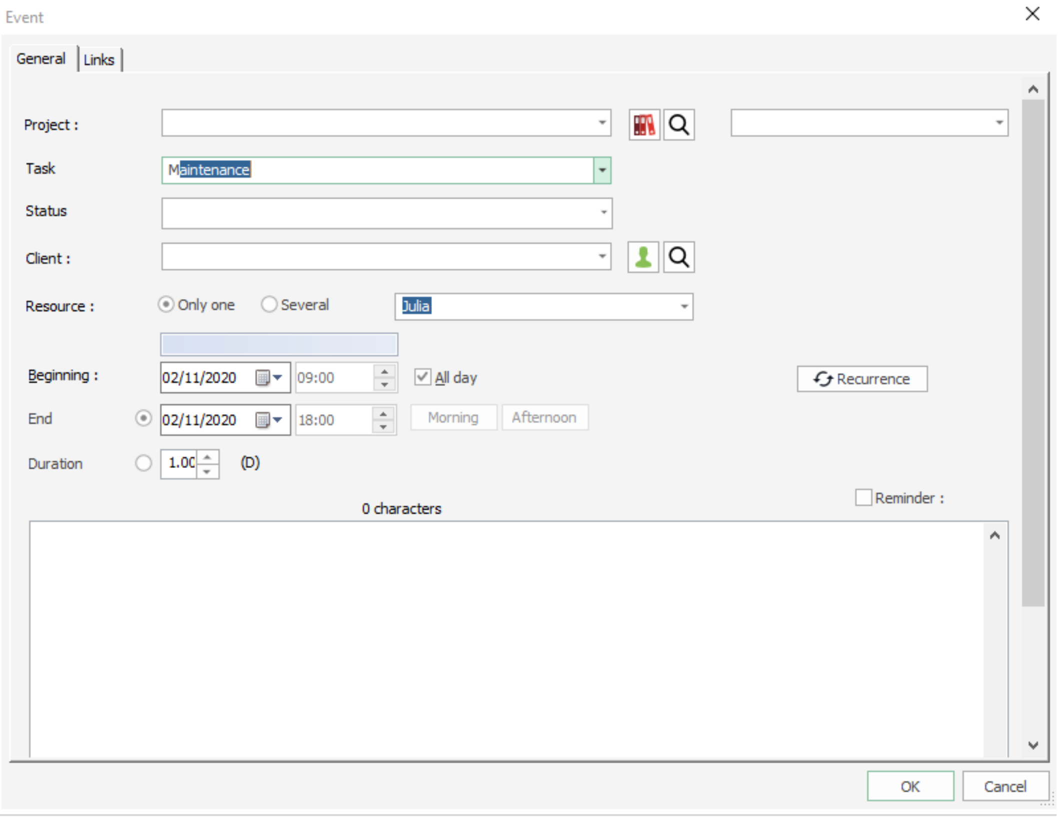
- With the shortcut CTRL + N

Then, the following window appears:




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




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

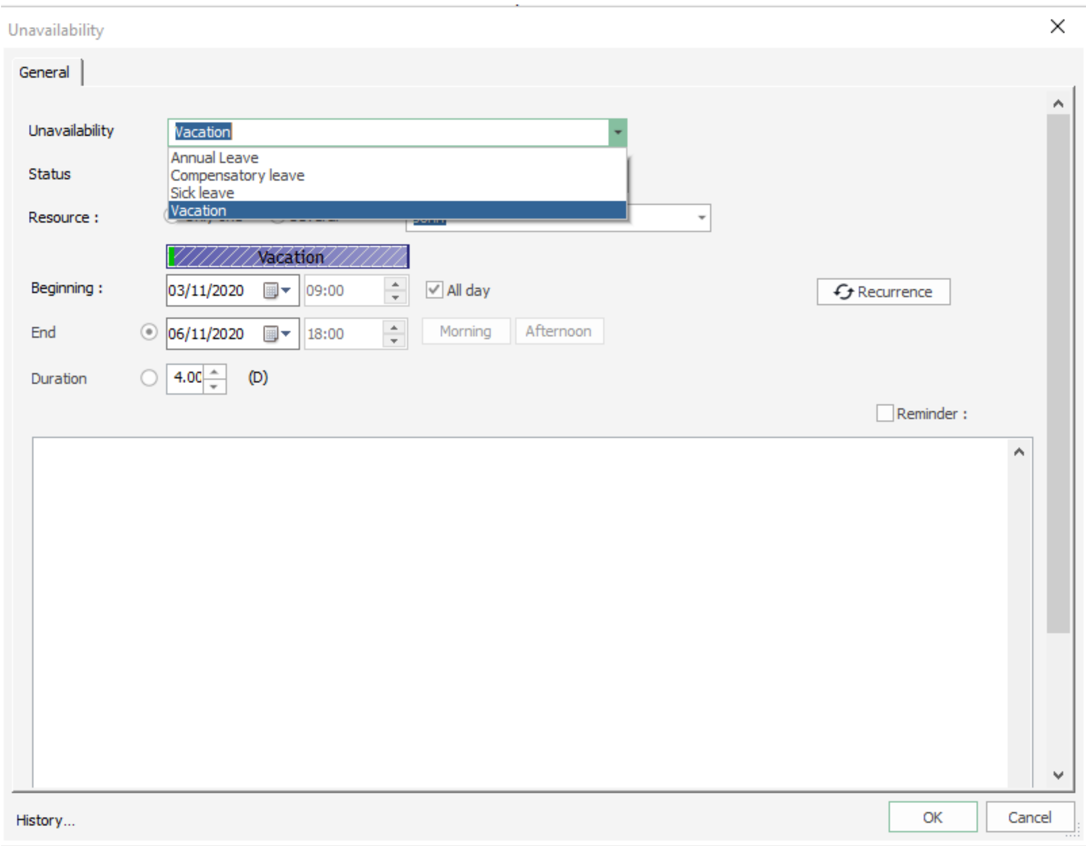
Draw a rectangle on the schedule with your mouse pressing the key "CTRL"

### Via a right click

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

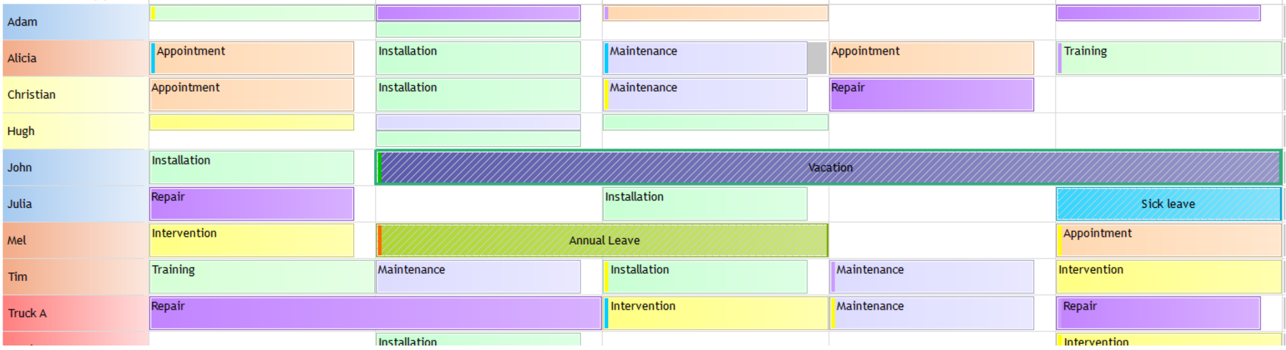
### Go to the menu Action -> Unavailability

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.




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.

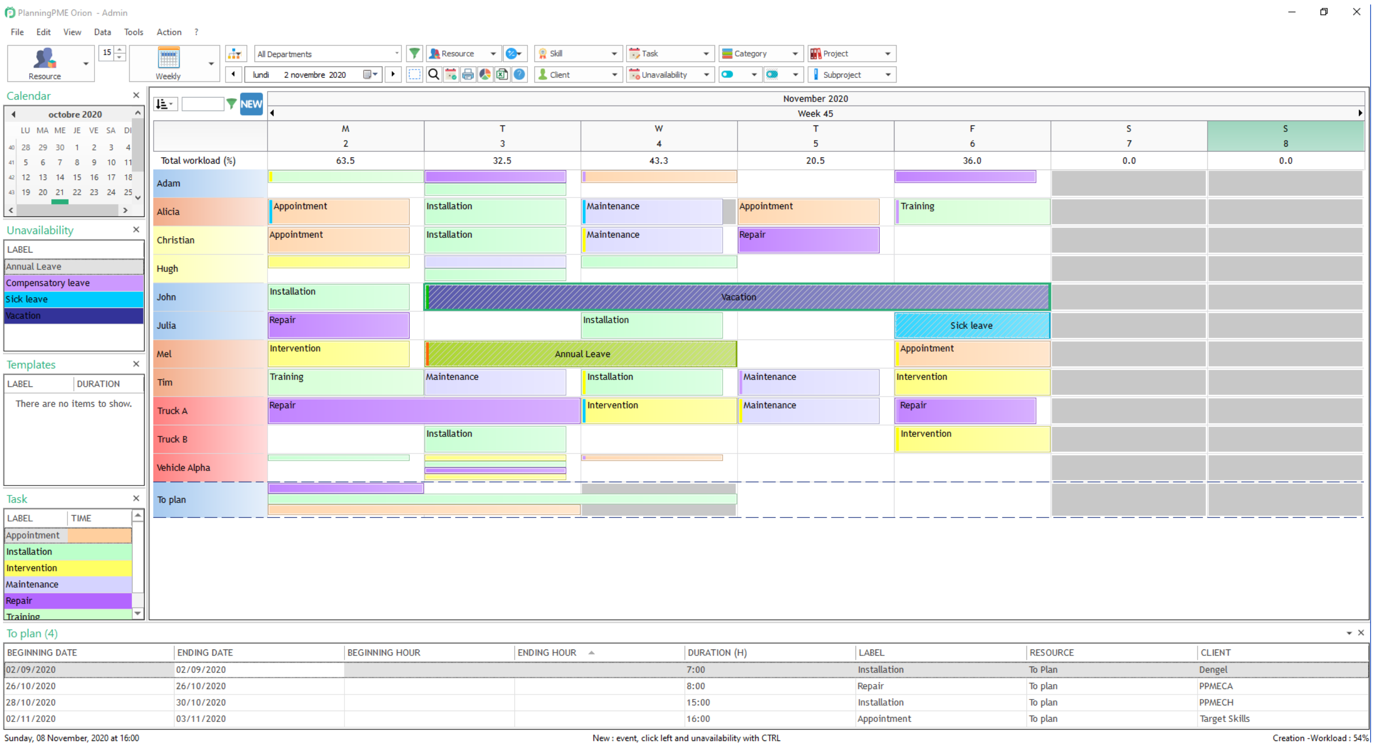
Results on the screen:




The unavailability appears with hatchings.

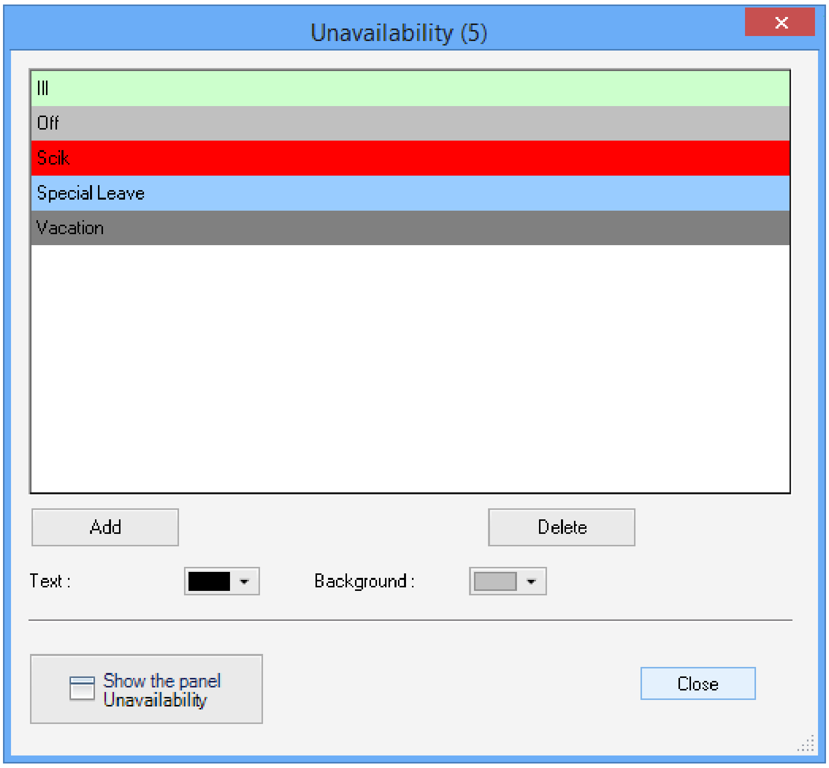
## Panels to create events and unavailabilities with a drag and drop

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



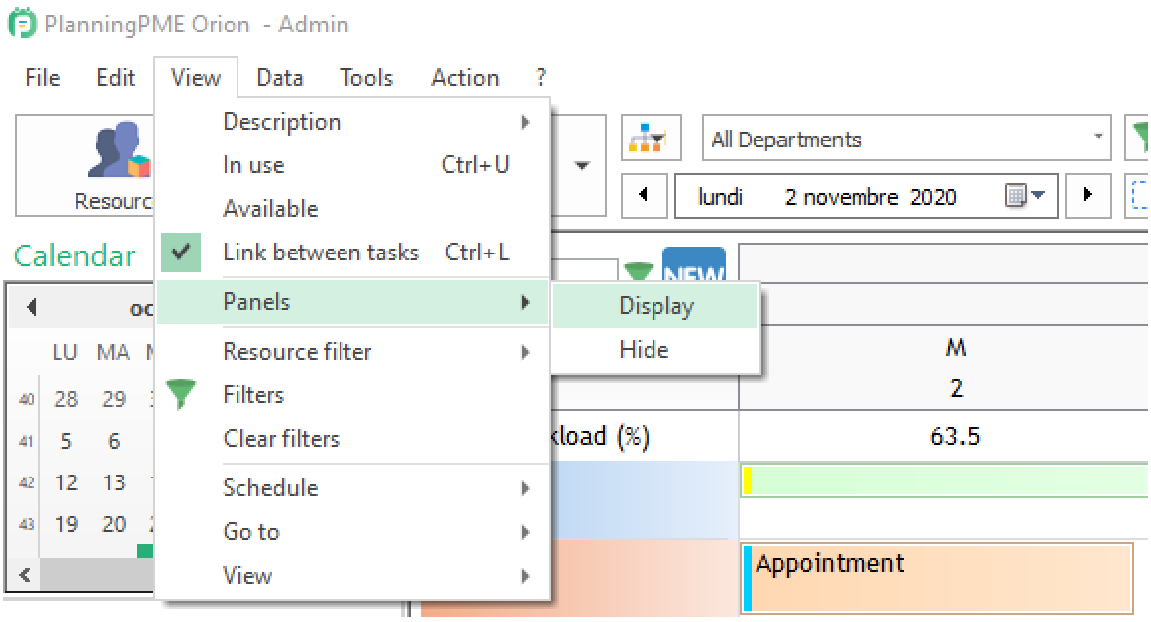
### Activate from the menu Data

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

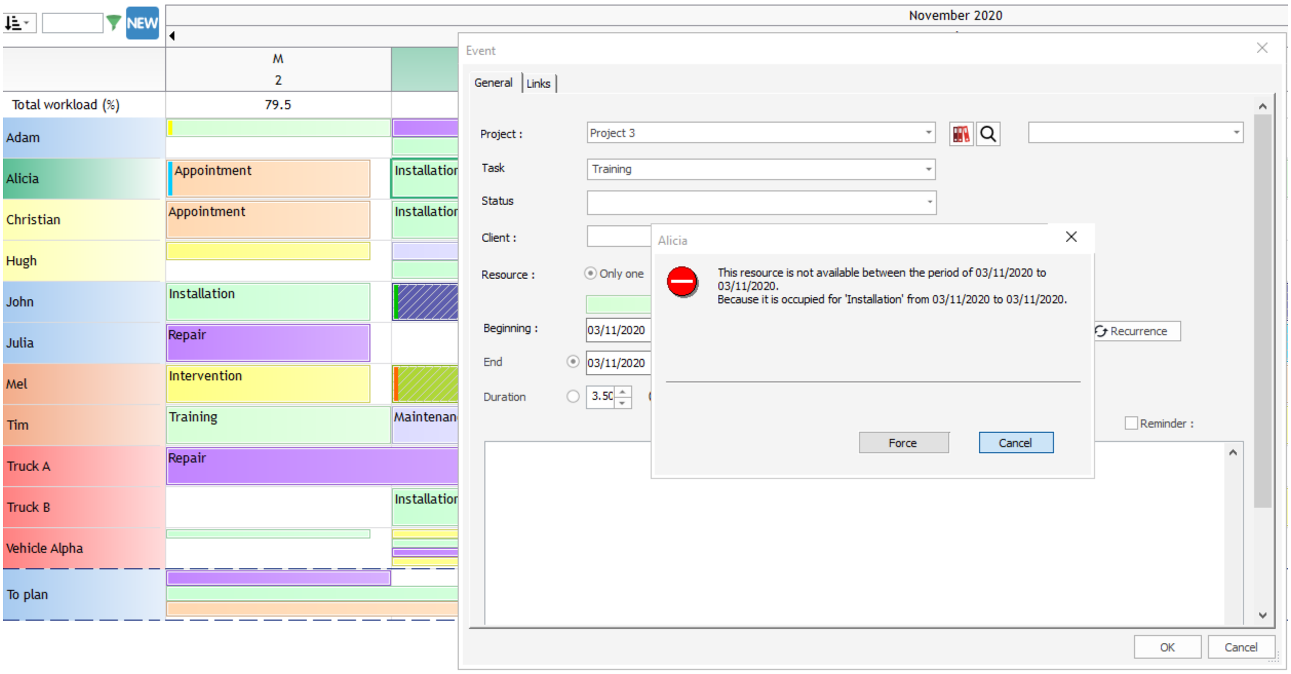
### Manage your events "on hold" or "to plan" easily

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

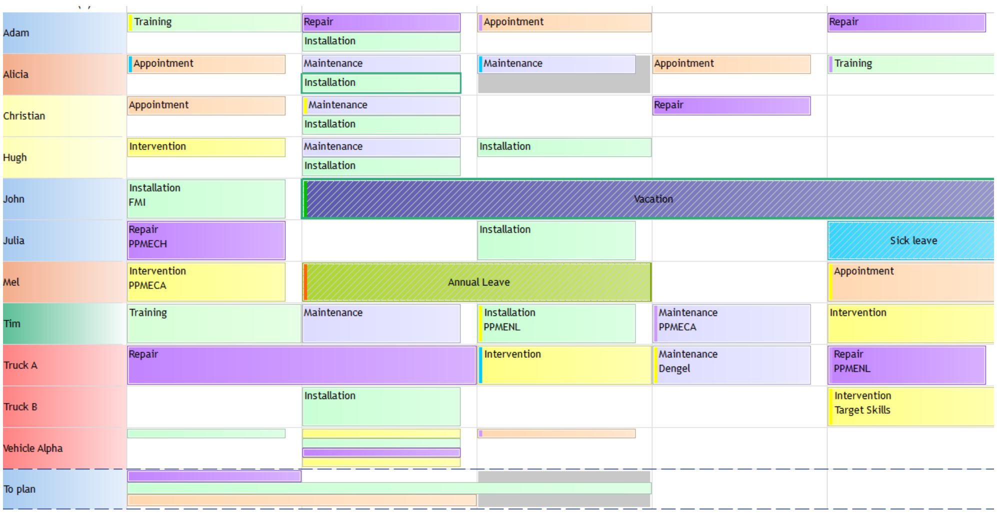
## Force the creation of an event

### 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.

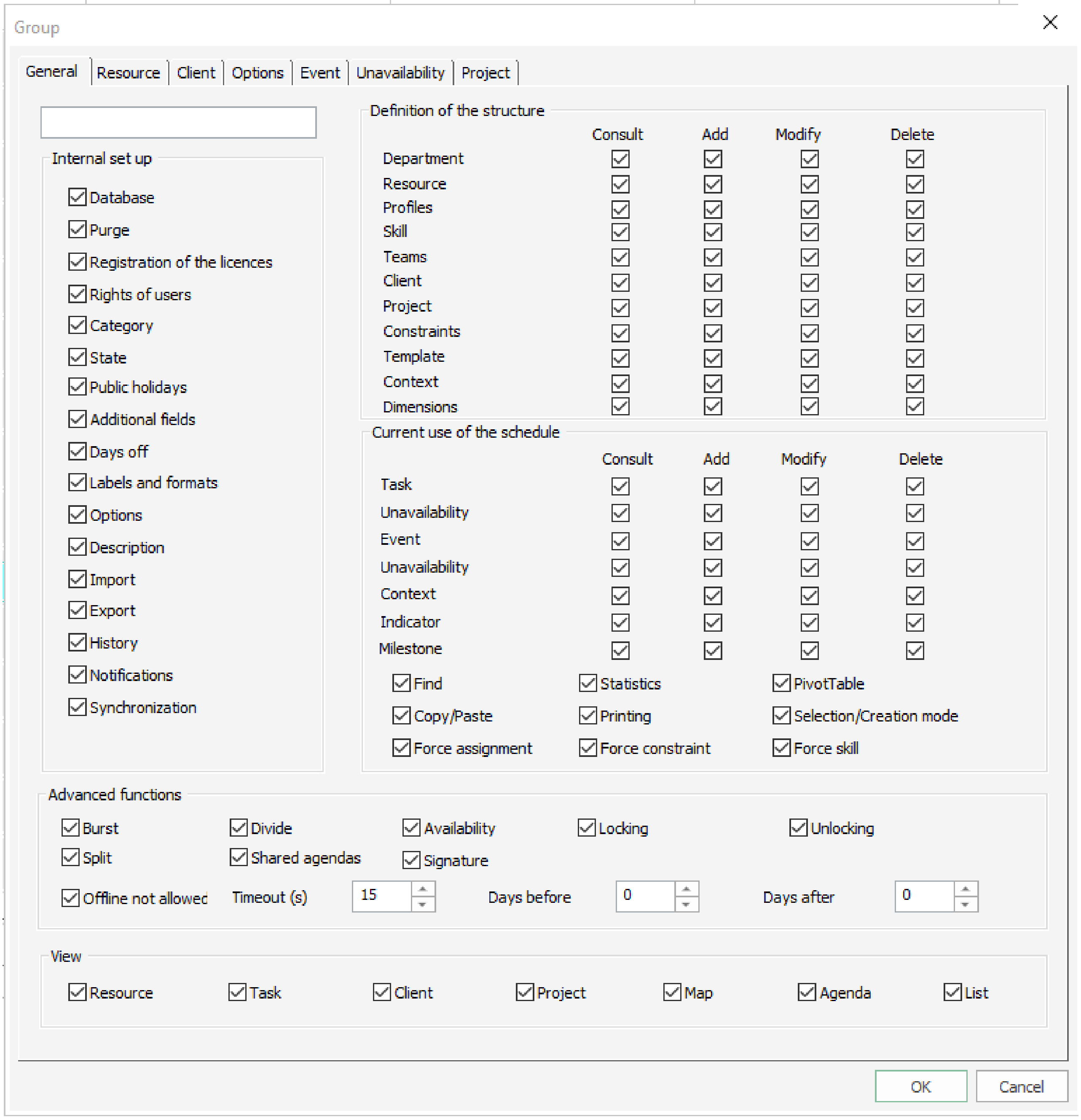



If you press “Force Assignment”, the event will be created and you will have two events on the planning as shown below:




Otherwise, the event will not be created.

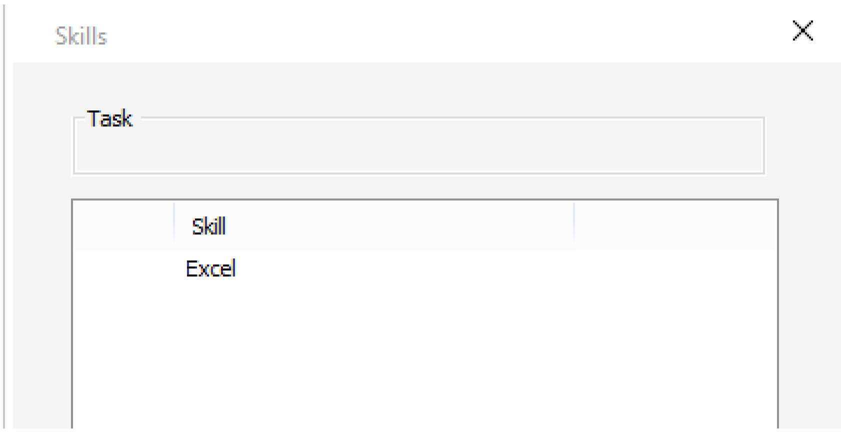
NB: If you are already a client and that you are using the users rights, this feature will not be activated by default so that the users will not have this permission.  To activate it, go to the menu Data -> Group and tick on the box “Force assignment”.




## Even if the resource is not skilled

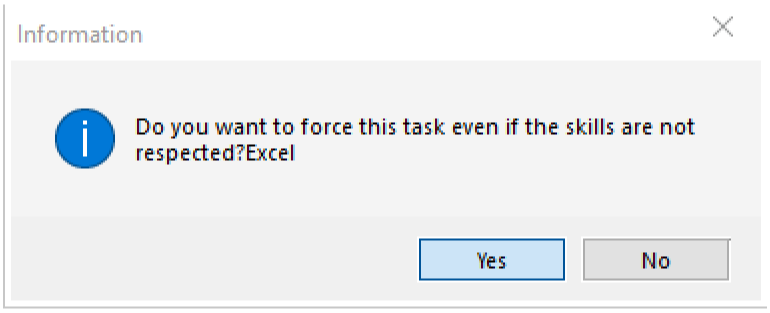
You can now force the creation of an event even if the resource is not skilled.

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

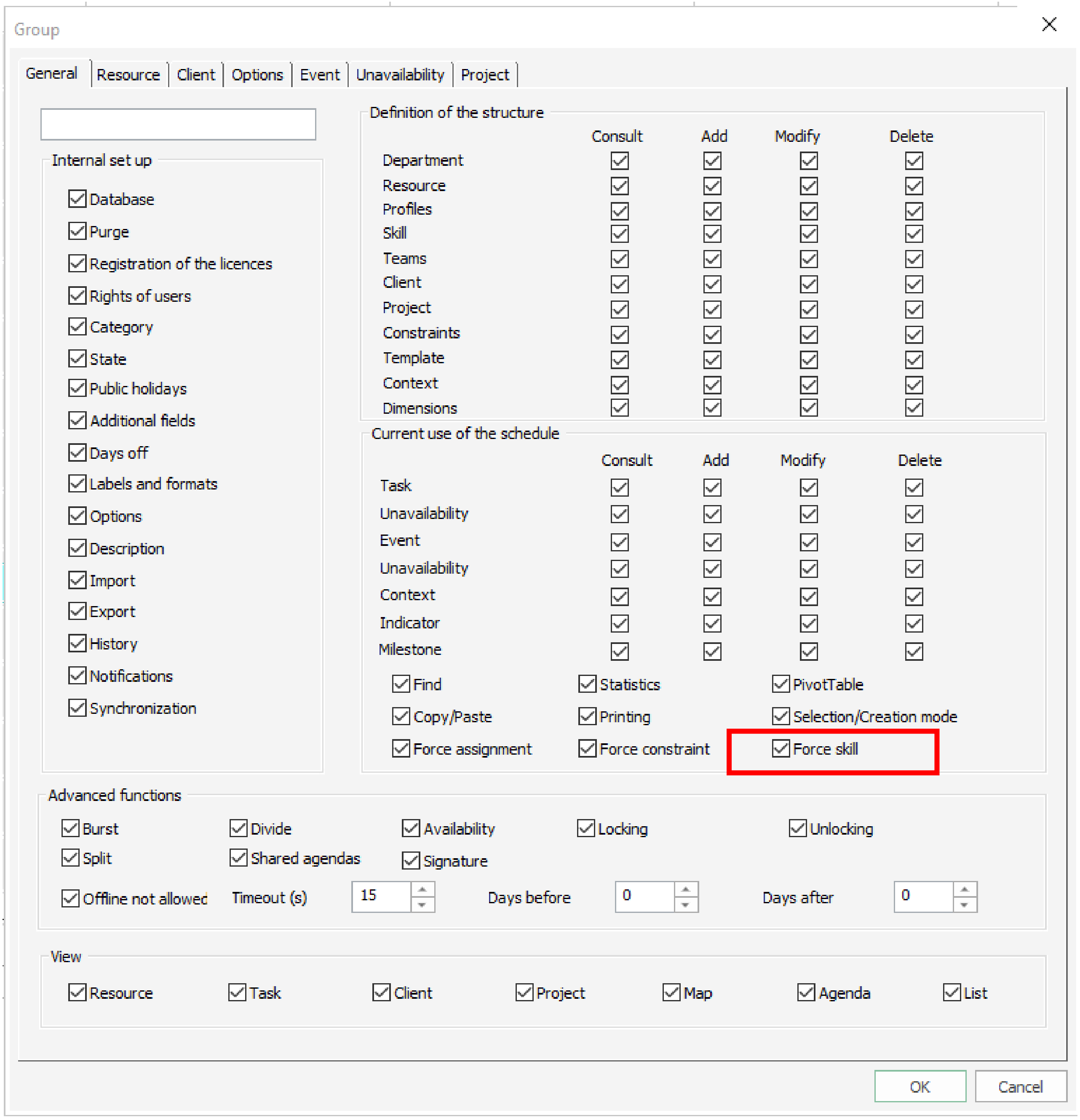



On the example above, we assign the skill Excel to the task “Training ”.*

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:




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



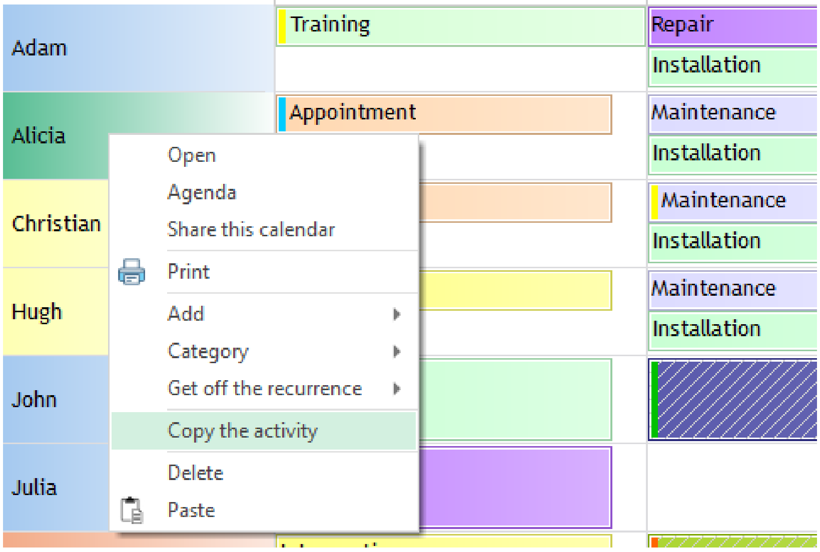

# Copy / Paste

## Copy/Paste one event or unavailability

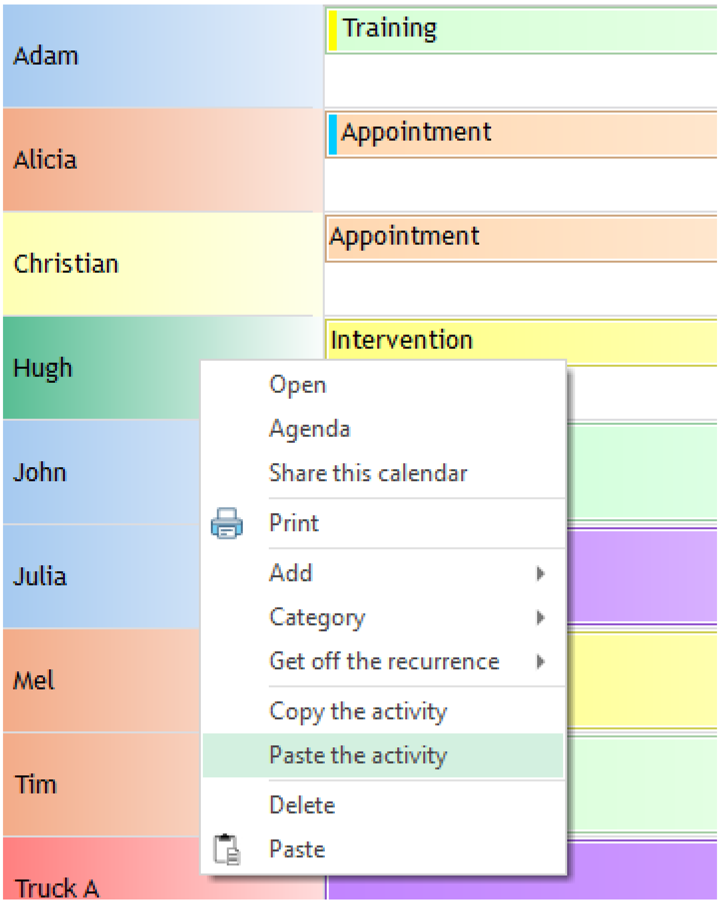
Select the event or unavailabilities, right click and select “Copy” (CTRL + C). Then paste it via a right click and “Paste” or CTRL + V.

## 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.

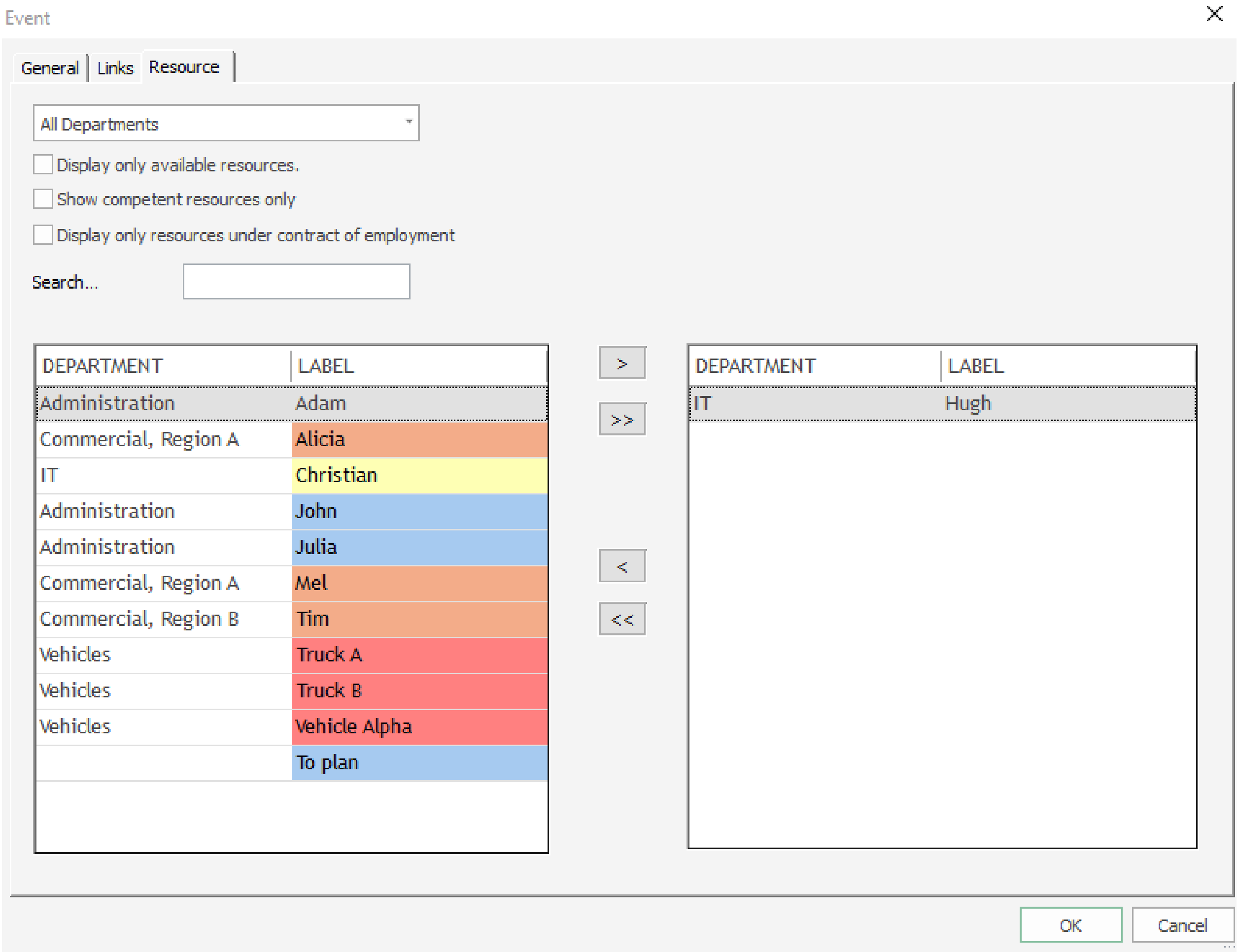
## Assign an event/unavailability to several resources

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.

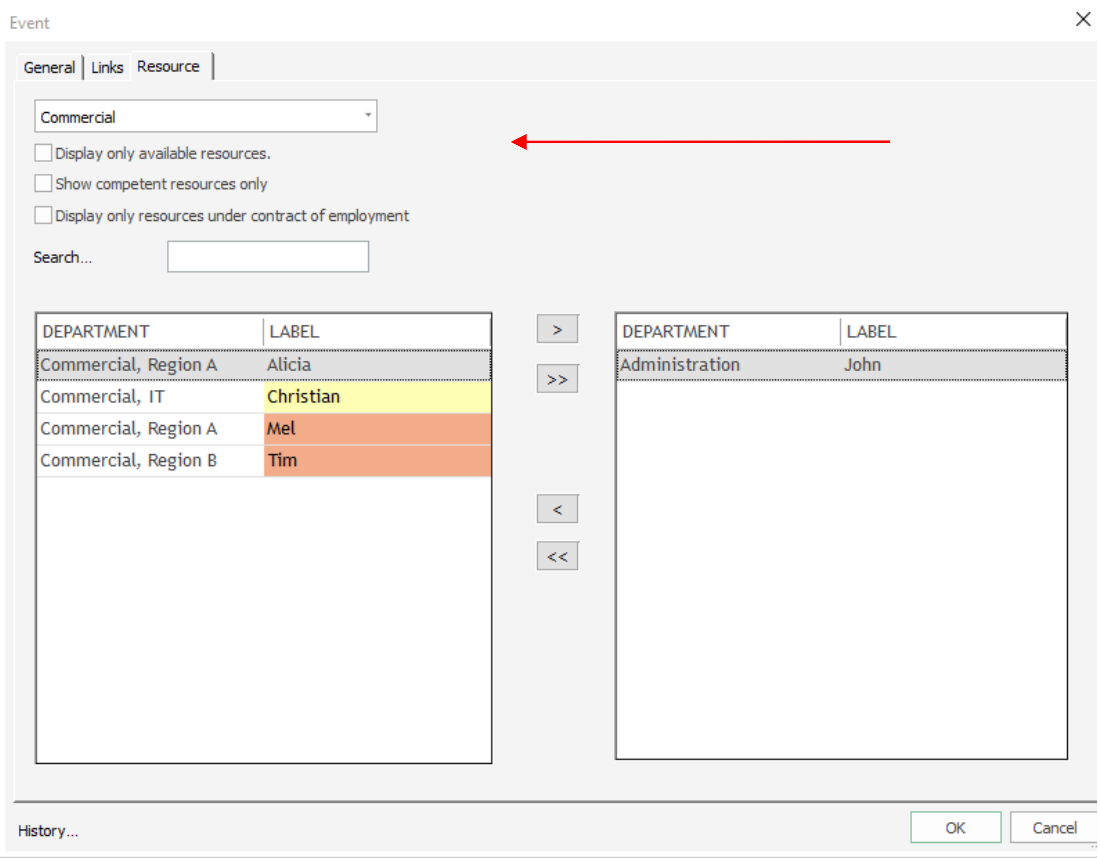



The single arrow button allows you to select resources one by one

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**




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.

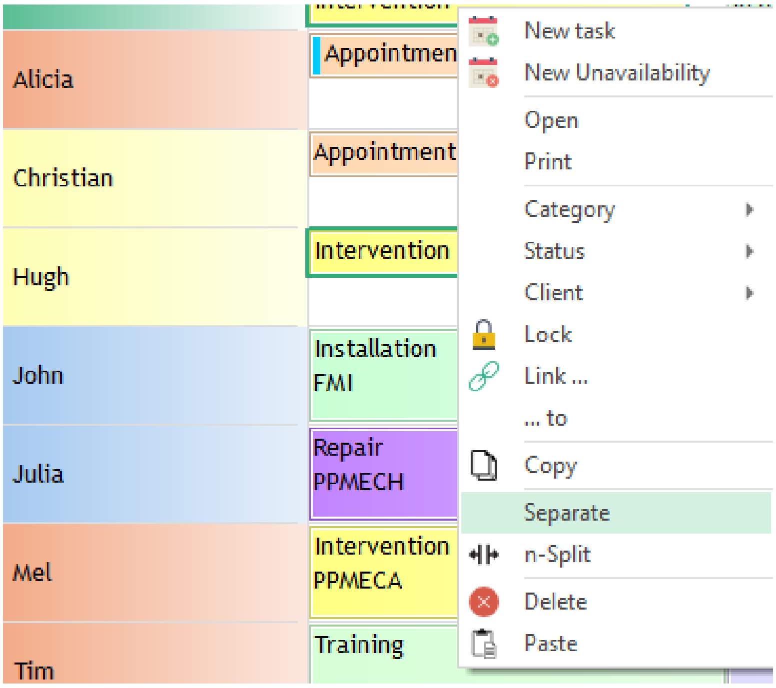
**Point 3: Display only resources under contract of employment**

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”.



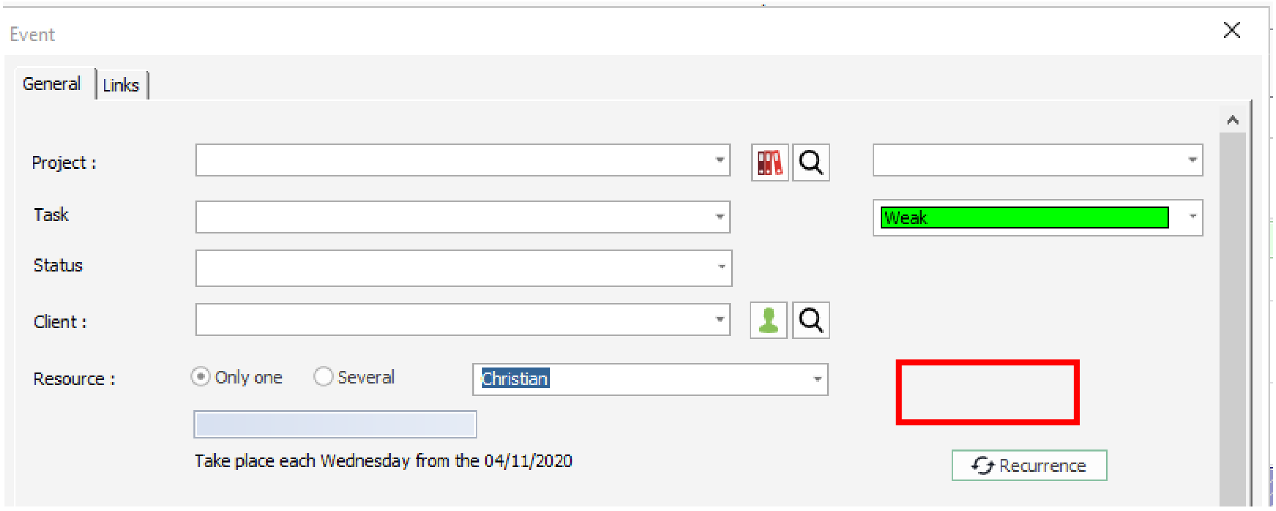

Then, you will be able to modify the event for the resource selected.

## Create periodical events

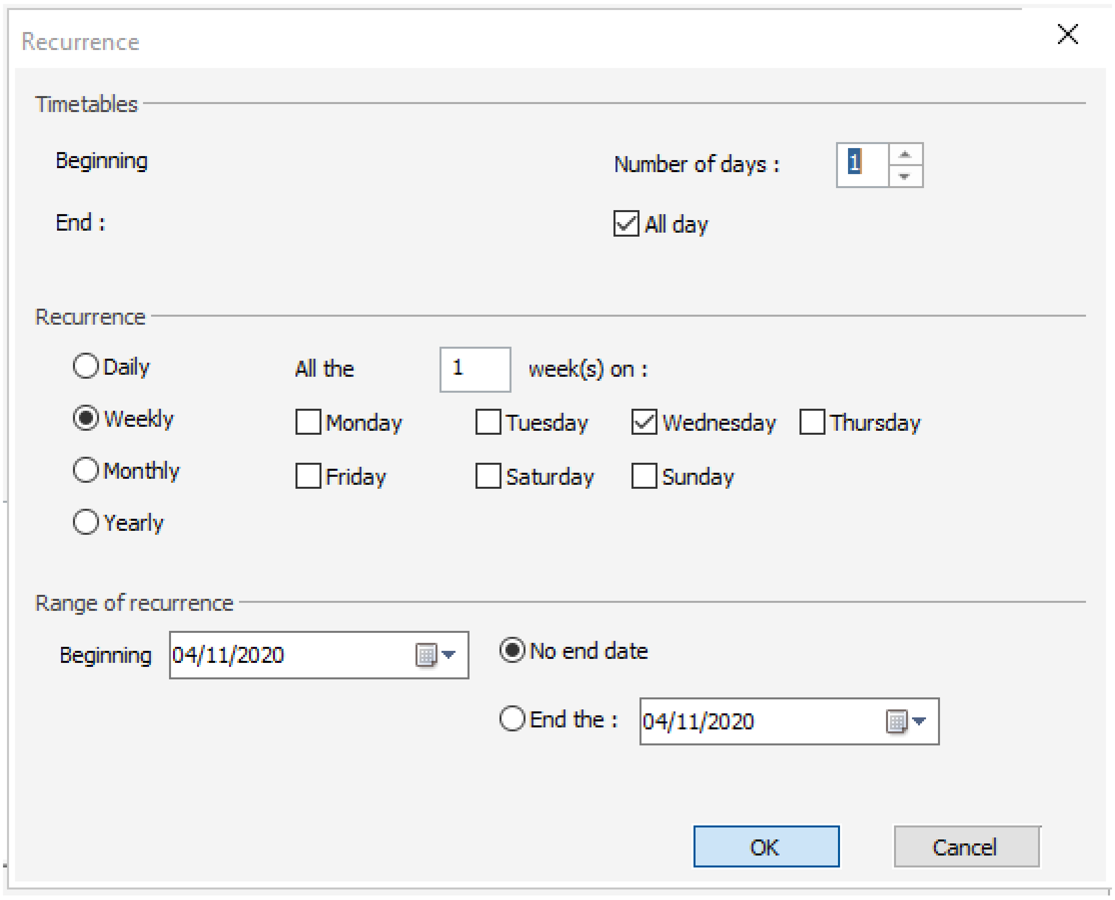
A periodical event is an event that is repeated on the time at regular intervals.
You can create recurrent events in order to save time. The function “Recurrence” will help you manage monthly meeting, yearly appointments…

### Create a periodical event

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



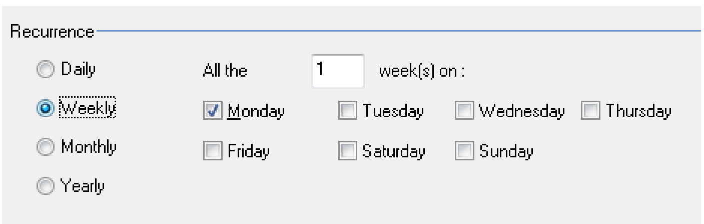

The following window appears:
Enter the beginning and ending hours for this event or select "All day".
Choose the frequency: Daily, weekly… and days when this event takes place.
Enter the ending date for your event and save.



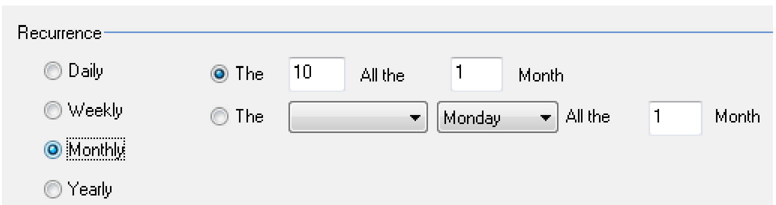

Visualization on the planning board:

## Daily recurrence


## Weekly recurrence

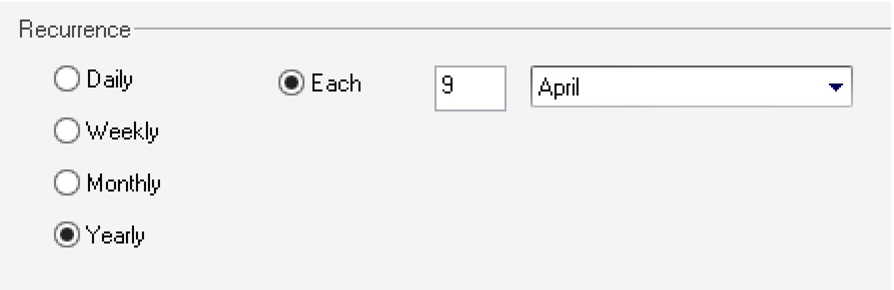



## NEW!!! From version 4.1. Monthly recurrence



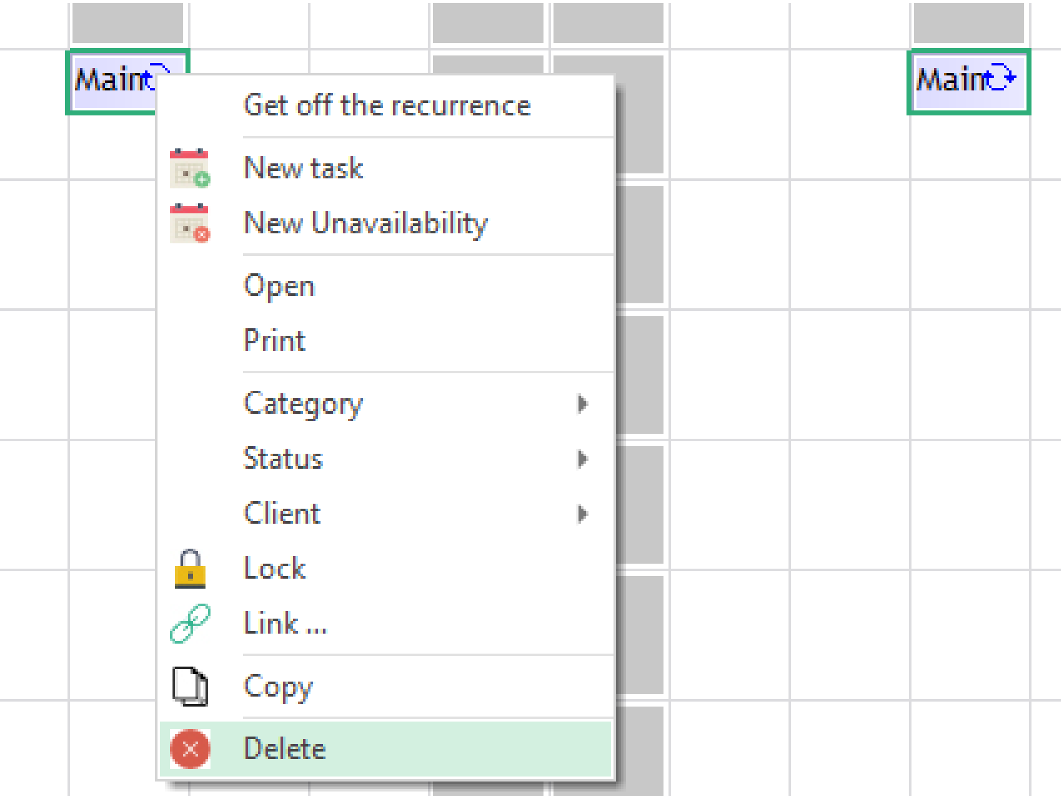

You can select either one day in the month or select for instance the second Monday of the month.

## Yearly recurrence

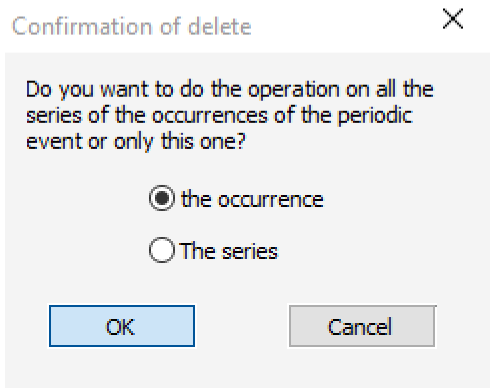



## Delete an occurrence or delete the series

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:



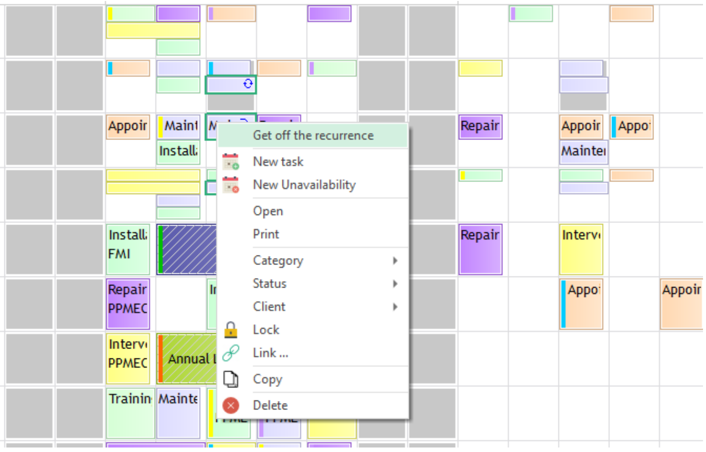

If you want to delete the selected event only, choose « the occurrence ».
If you want to delete all the series, choose « the series ».

## 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:

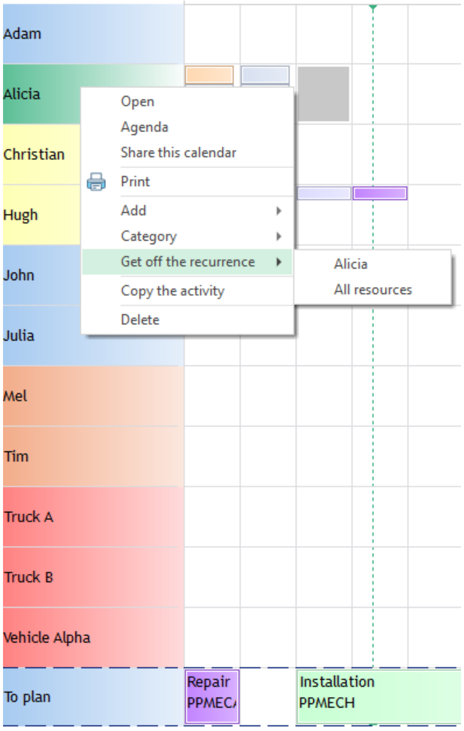



Select "Get off the recurrence".

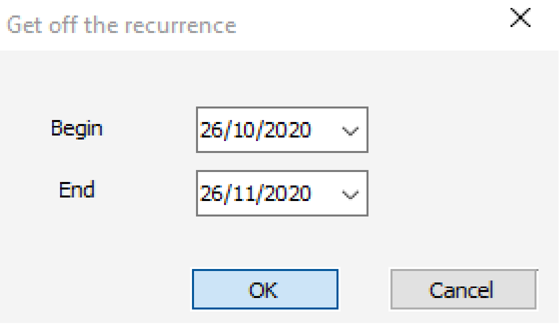
-> To get off several events from the recurrence:

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.




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

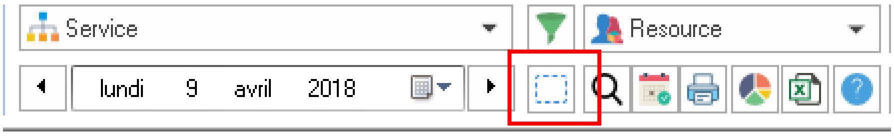
Select the event or unavailabilities and shift it via a drag and drop directly on another resource and/or on another date.

### 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.

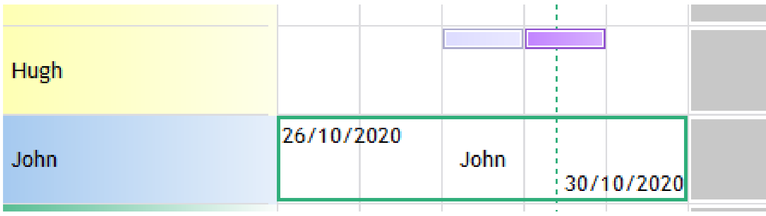



While going to the “Selection” Mode, you can shift your events. After your action, the program will go back automatically to the Creation Mode.
You can select several events at the same time drawing a rectangle grouping several events or selecting them one by one with the key CTRL pressed on.
Shift your 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

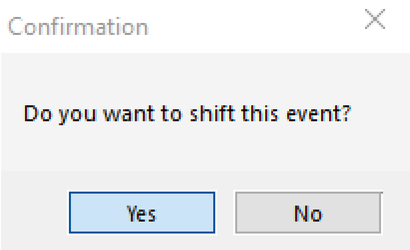
Place your mouse at the right side of the box until your cursor become a triangle and change the duration with your mouse stretching the box directly.




## 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”.

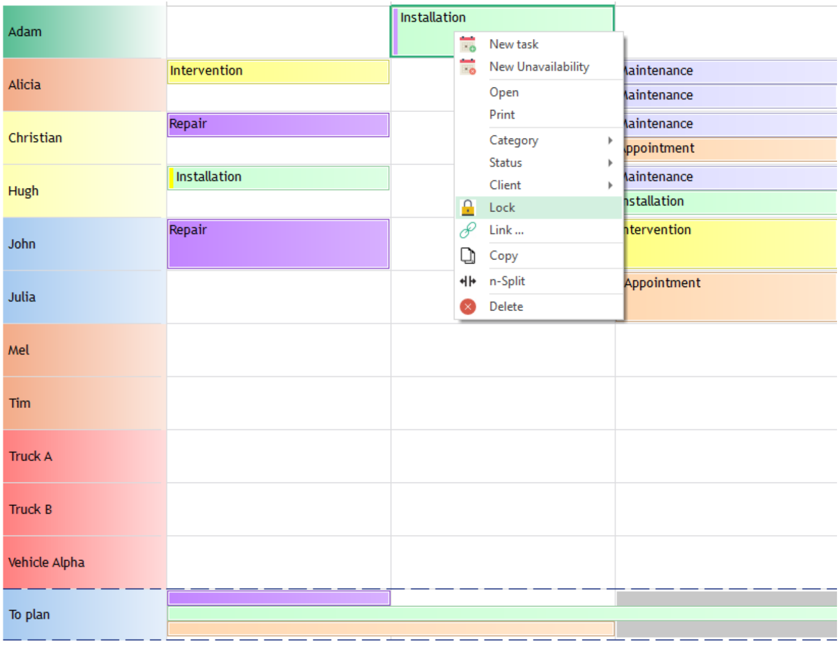
Then, while moving an event via a Drag and drop with your mouse, you will have this message:
“Are you sure you want to shift this event”?



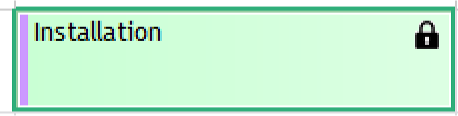

## Forbid events modification

### Lock your events

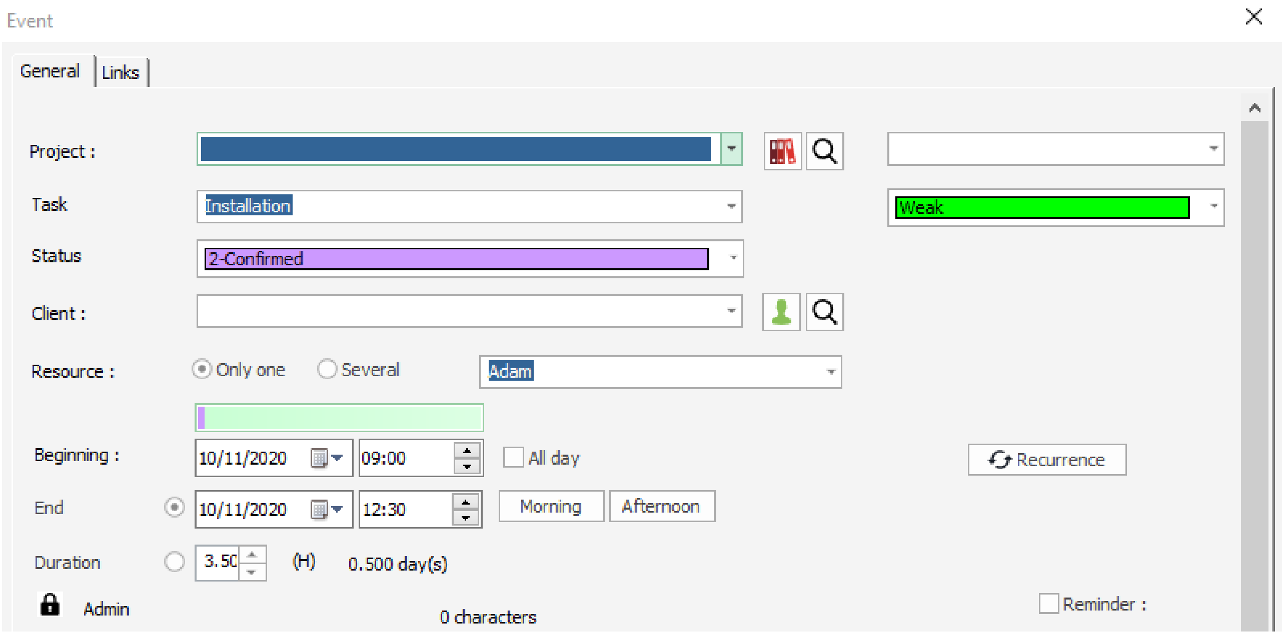
You can lock some events in order no one to modify them without your agreement. First of all, to have access to this option, you must enter the schedule with user's rights.




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

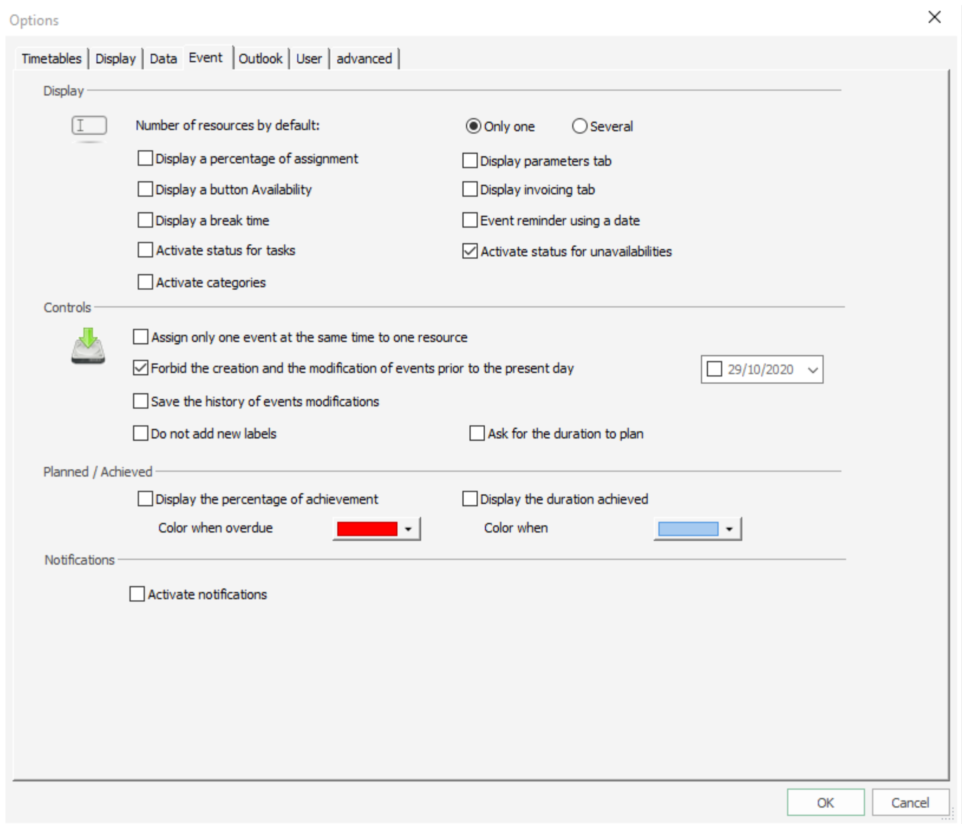



You can visualize the locking by an icon padlock.

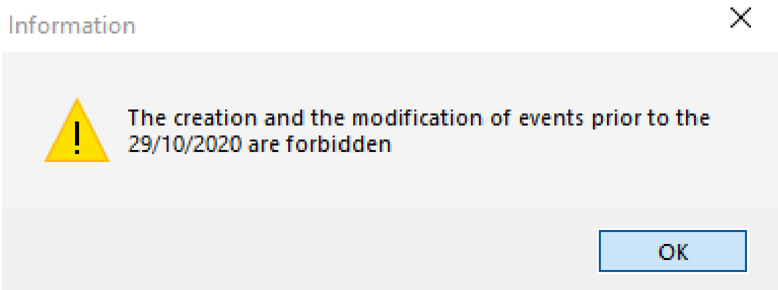
Only the person responsible for the locking or the administrator will be authorized to unlock the event selecting “unlock” with a right click.

**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.

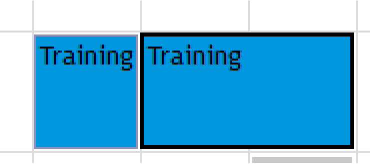


You will then have this message:



### Split an event into 2 events on different durations

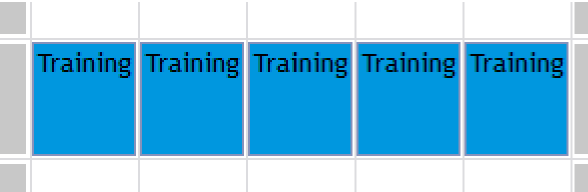
Select an event on the planning board.
Then, right click and select “Split”. Your event will be split into 2 events.




### 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

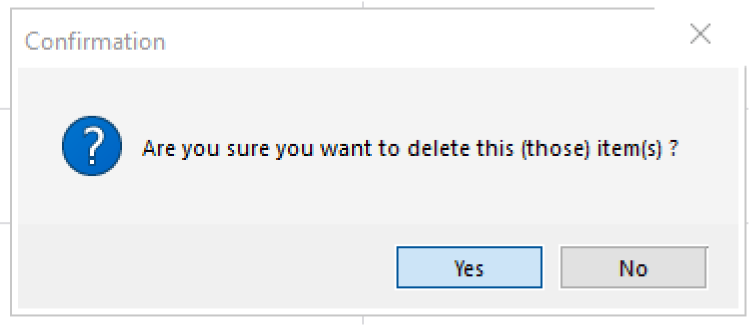
## Delete events or unavailabilities

### 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.

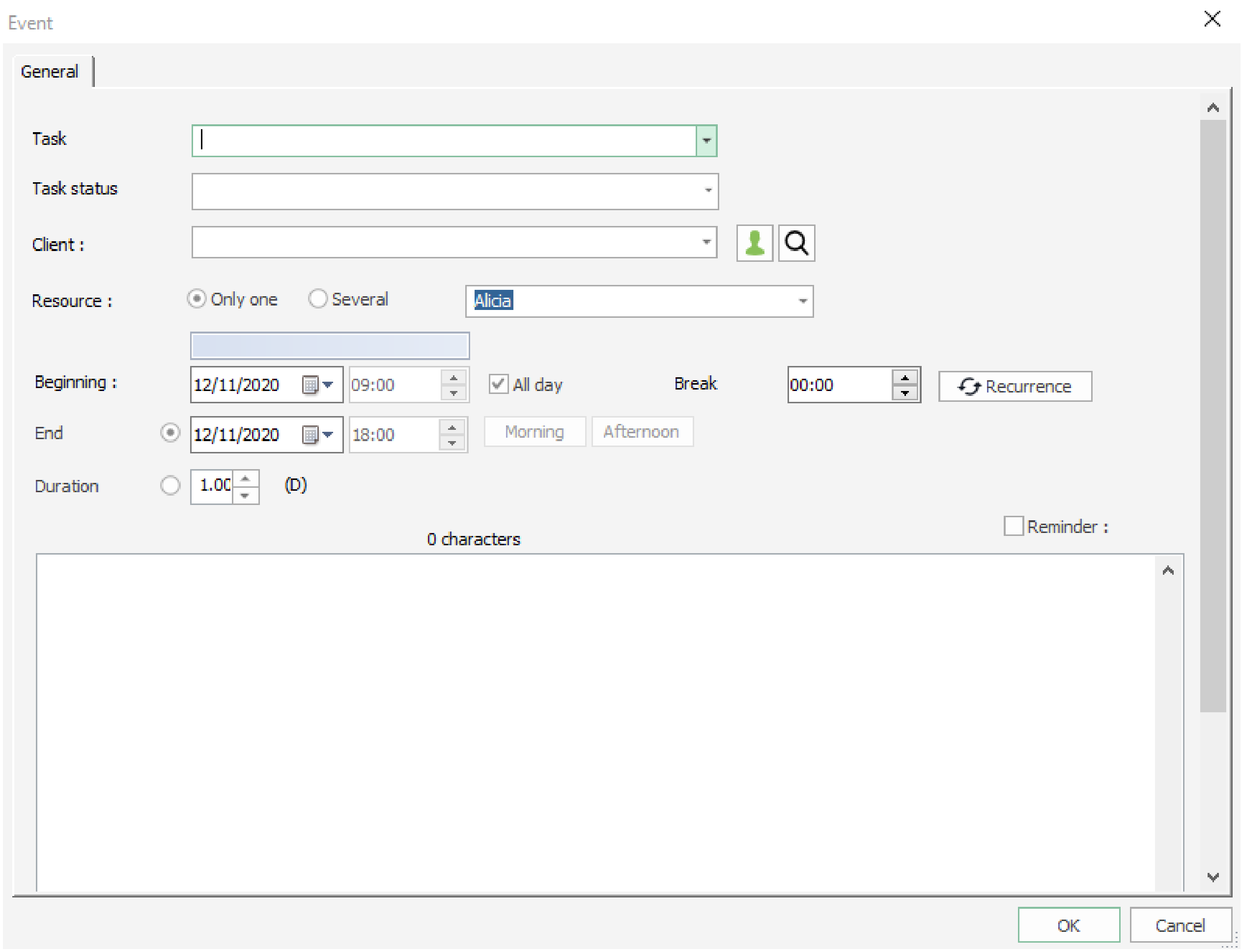
## Event duration

### 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.

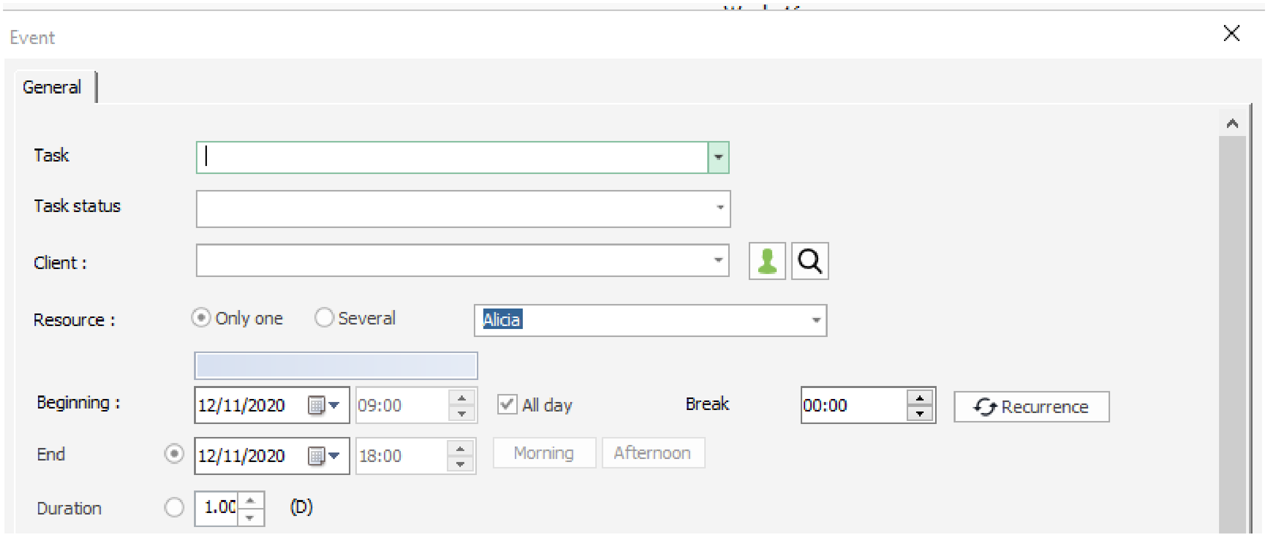



**Careful! An event with a duration can only be assigned to one resource.**

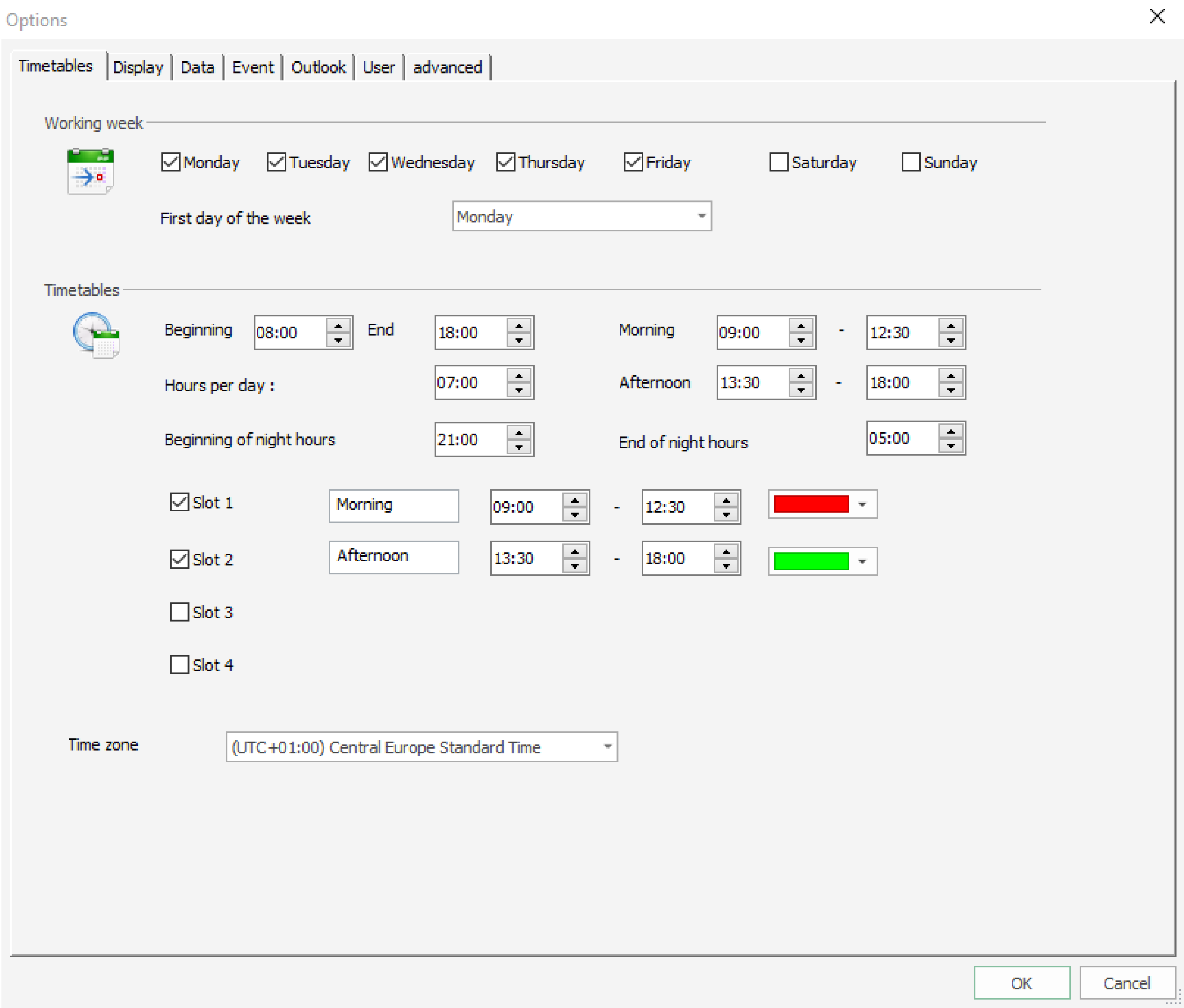
**NB** : Ticking on "All day" you can enter a length in days.
Ticking off "All day" you can enter a length in hours.

## Slots button within the event window

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




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"

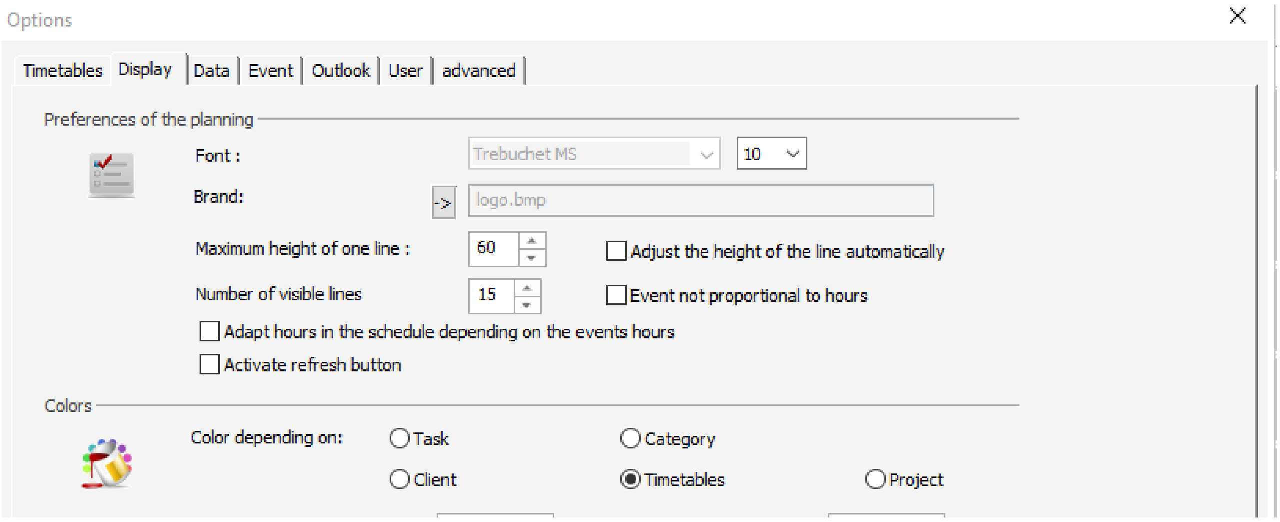



You can create up to 4 slots ticking on the boxes « Slots » and giving them a name.

Example:

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

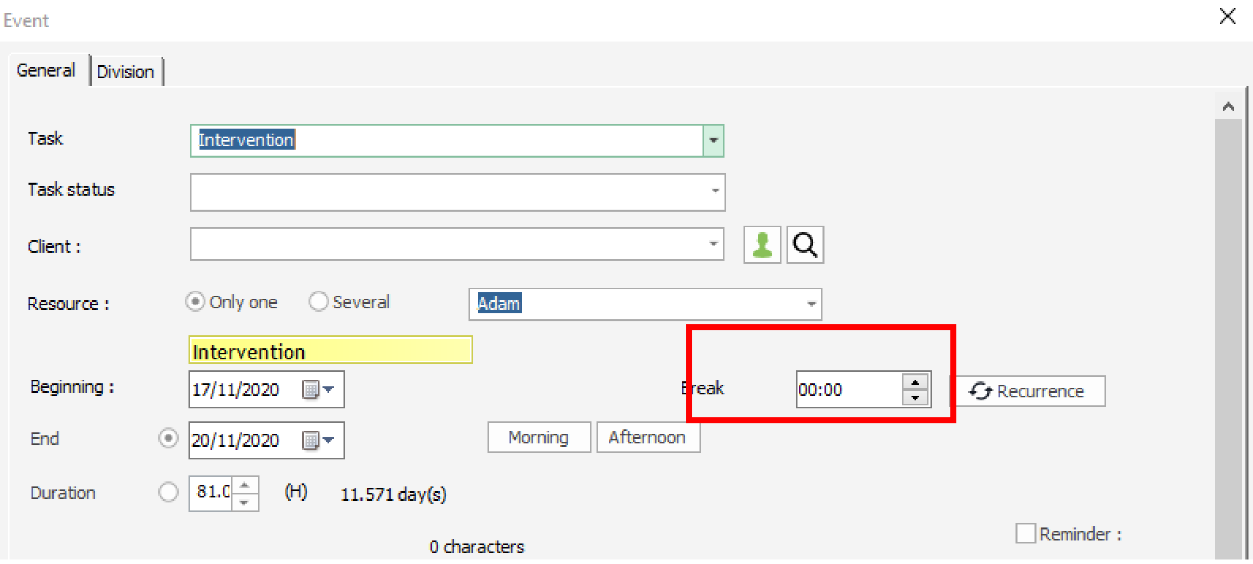
Tip: You can have the colours of the events displayed in function of the colour given for each slot selecting “Timetables” from the menu Tools -> Options -> View.




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".



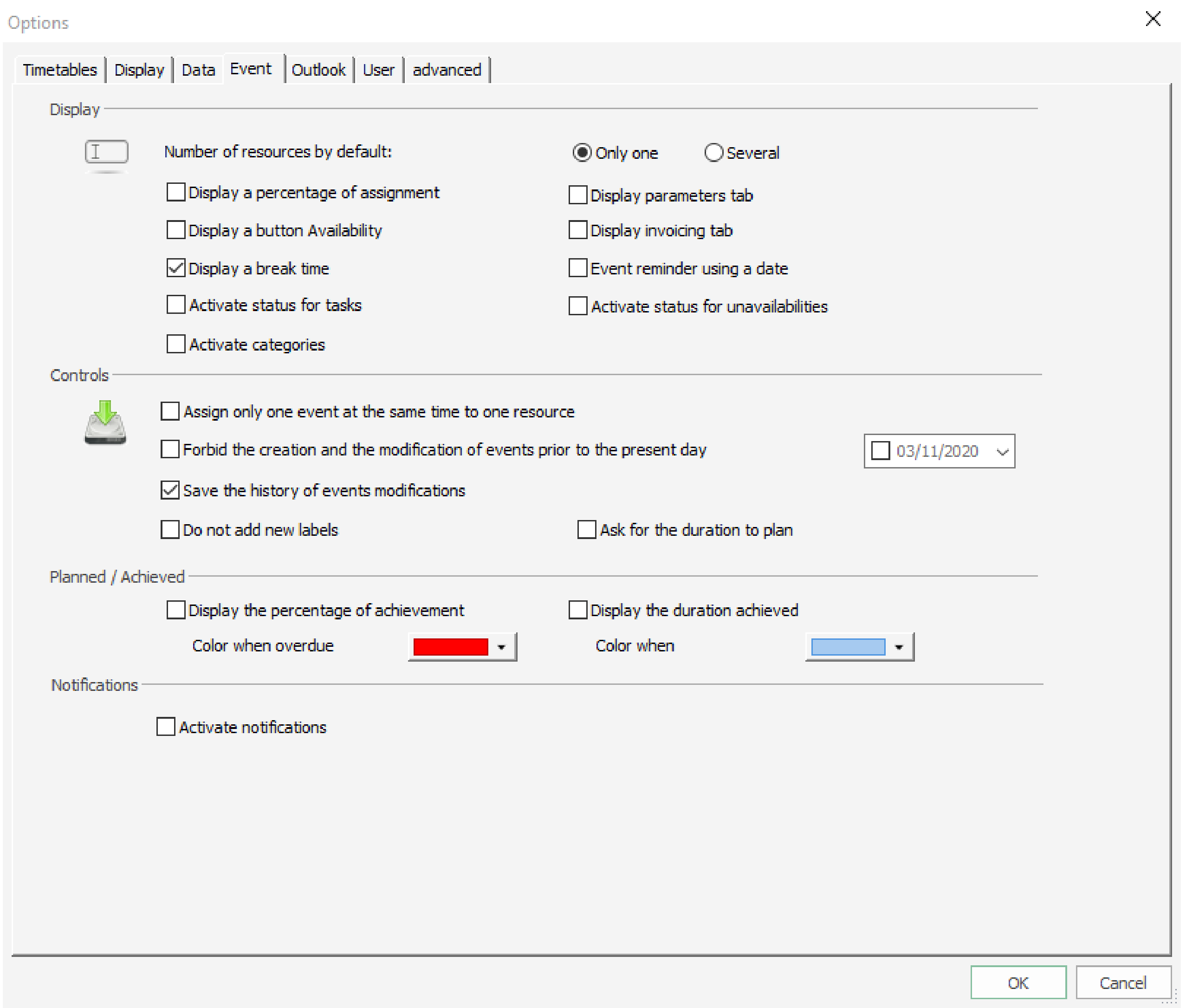

You can indicate a break in hours. This time will be taken into account on the hours calculation.
Careful: Events with a duration in days can have a break in hours assigned! It will not be counted.

## Events options

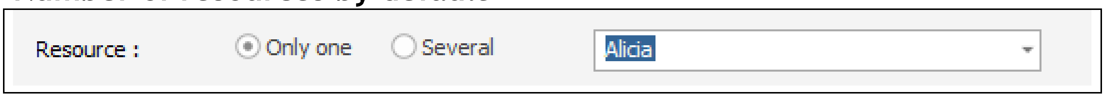
PlanningPME is a software entirely customizable. It has initially a simple aspect and can become more furnished depending on the options activated from the menu

**Tools -> Options -> Event**

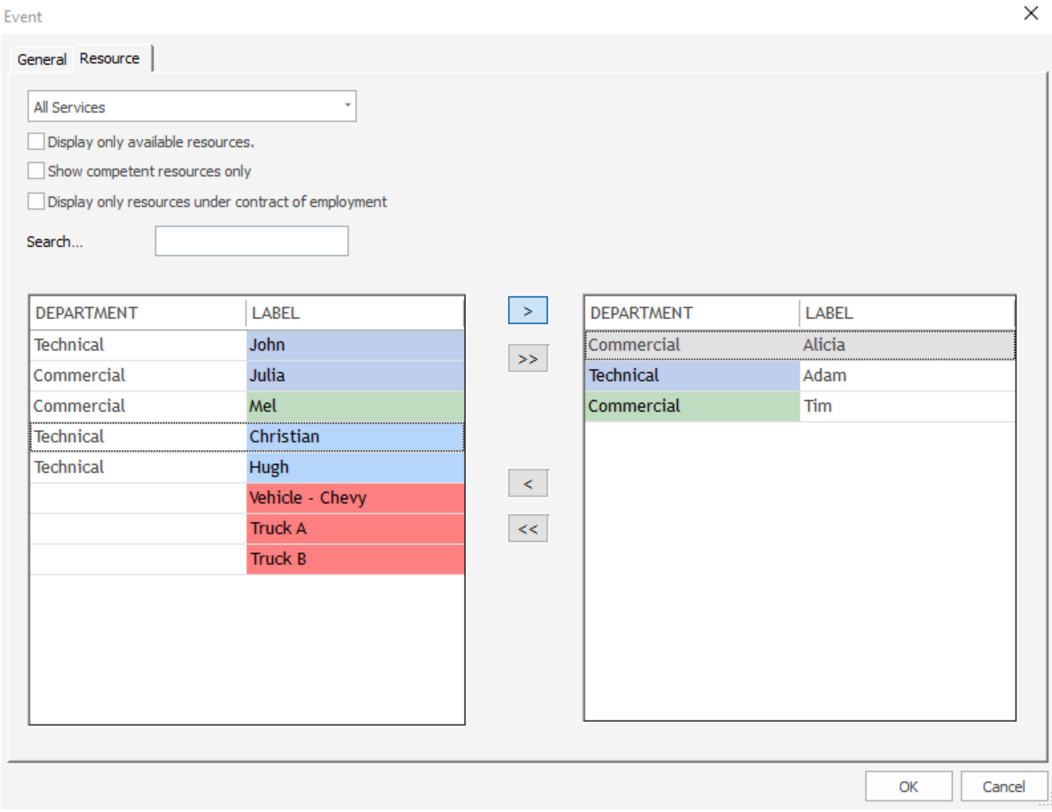
We will describe on this document all the options you can activate from this window:




### Number of resources by default



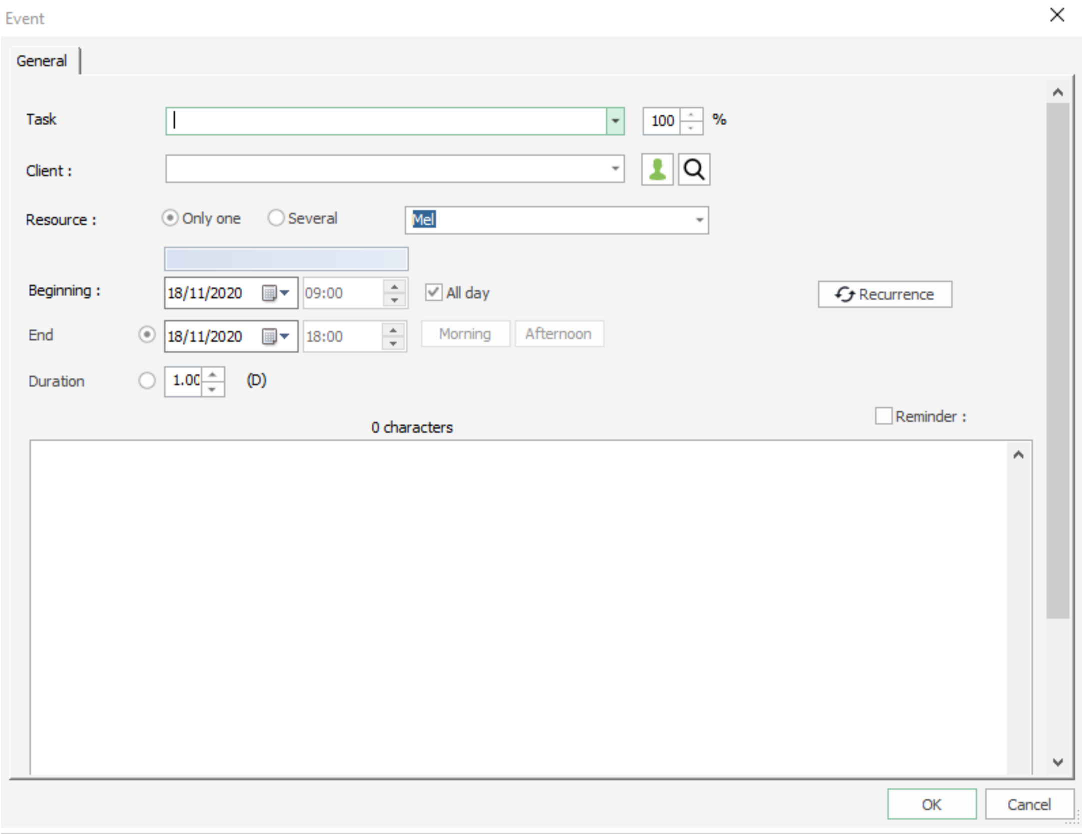

Choose if you prefer one or several resources for each event by default.
If you choose « Several », the tab « resources » will appear by default in the « Event » window.




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

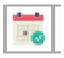
Ticking on this option, a scrolling menu will appear on the event window:

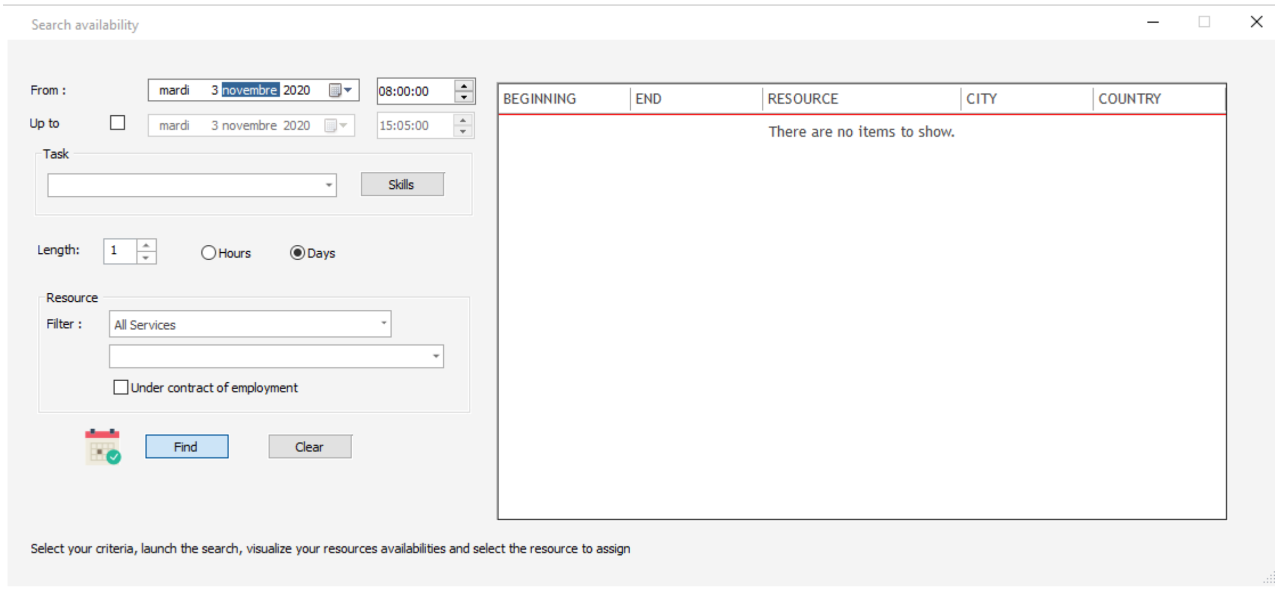



**What is useful for?**
While assigning an event, if you do not want to decide which moment of the day your resource will do this event, you can assign a percentage for this event!

***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.

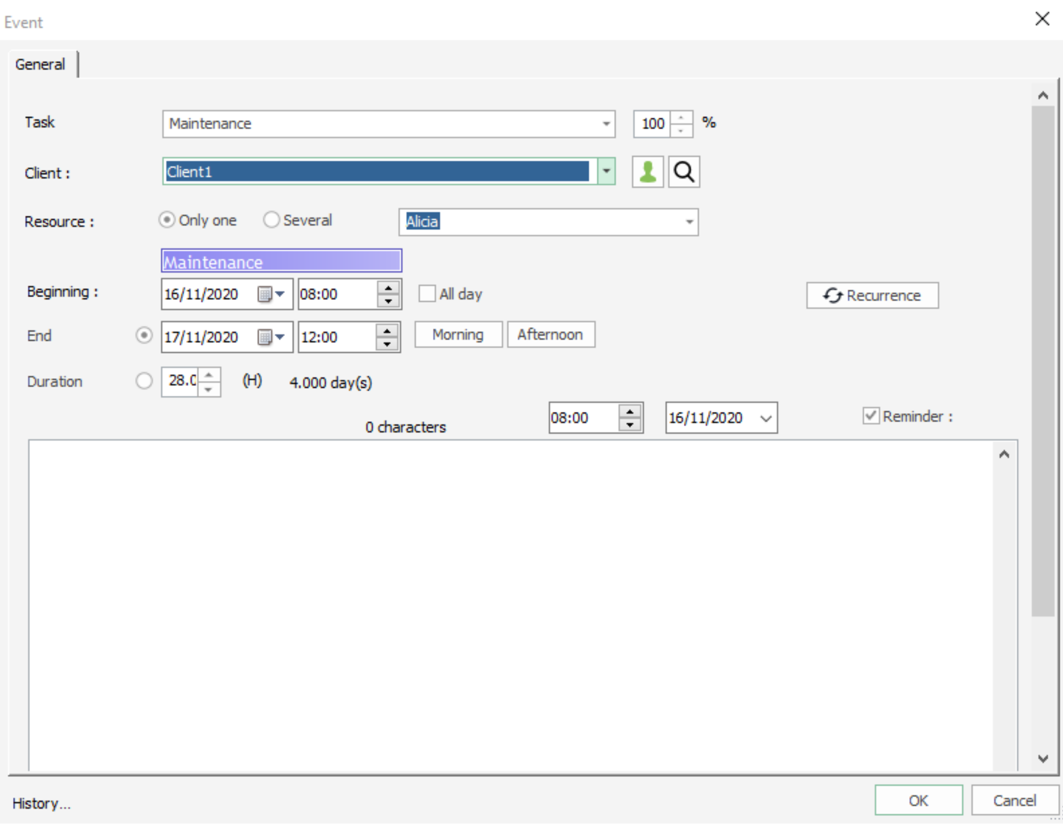
## Display a button « Availability »

Activating this option, a new icon appears on the event window. 
You can find available resources for this event directly from here:




## Event reminder using a date

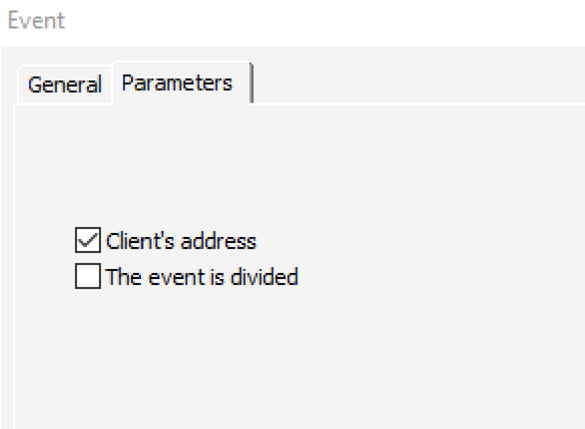
Selecting this option, you can now use a date as a reminder.
Then, when creating an event, we can specify a date and time for the reminder.

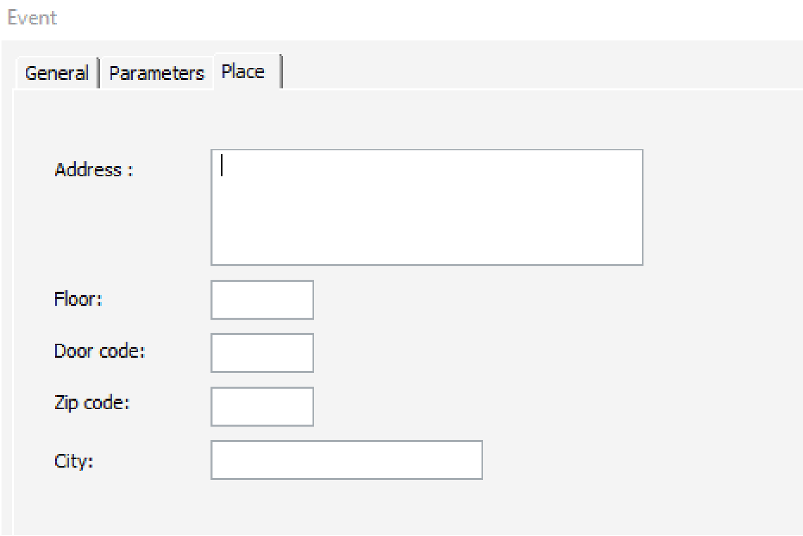



## Display parameters tab in the event

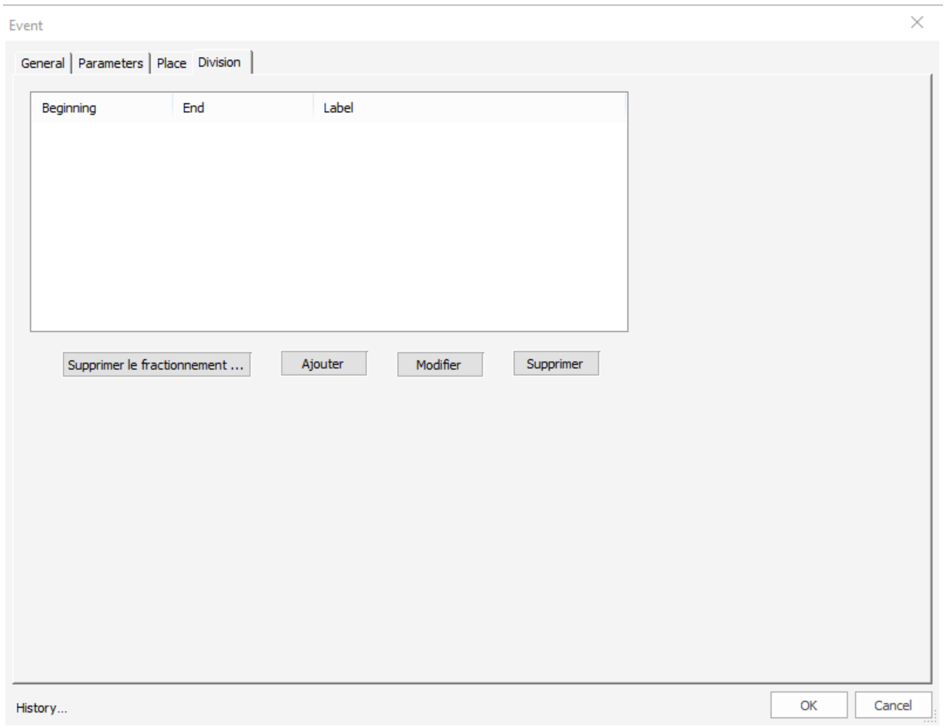
➔ Intervention place and event division

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 cl the button « apply », a new tab « Place » will appear. You can then indicate the place of your appointment.




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.

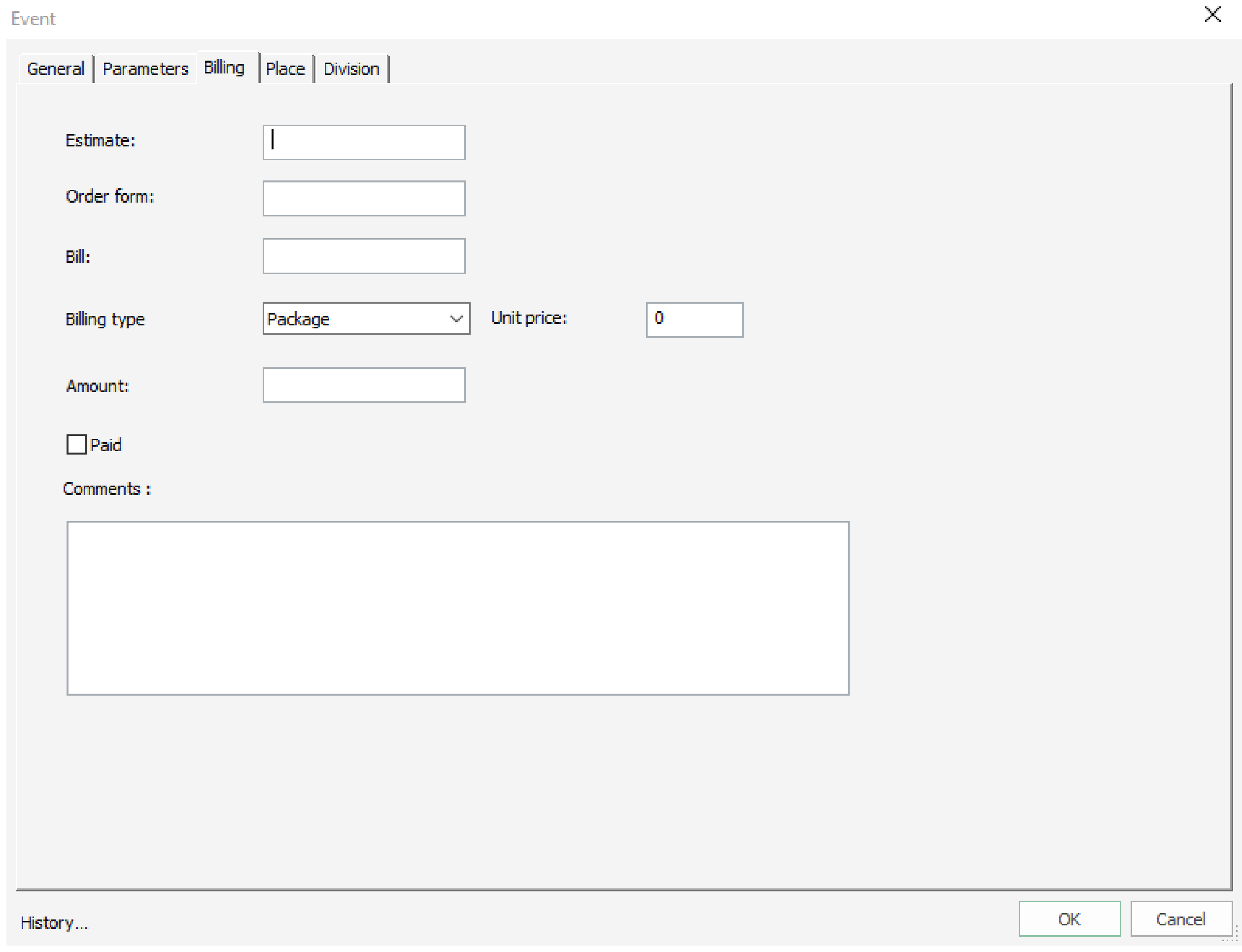



**NB:** You can also split your event via the icon " N Split" symbolized by this icon:  at the top left side of your screen. A cursor then appears and you can split your event on the schedule selecting the event and cutting it with your mouse.

## Display invoicing tab in the event

➔ Tab "Billing"

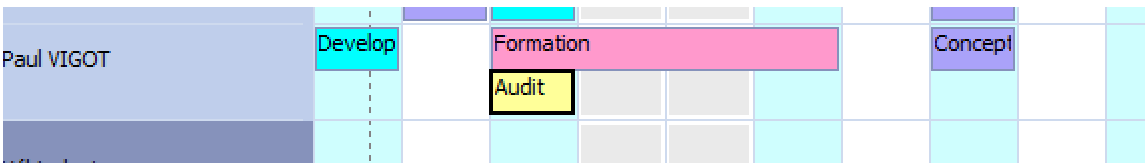
When you create an event, a tab « Billing » will appear on the event window:



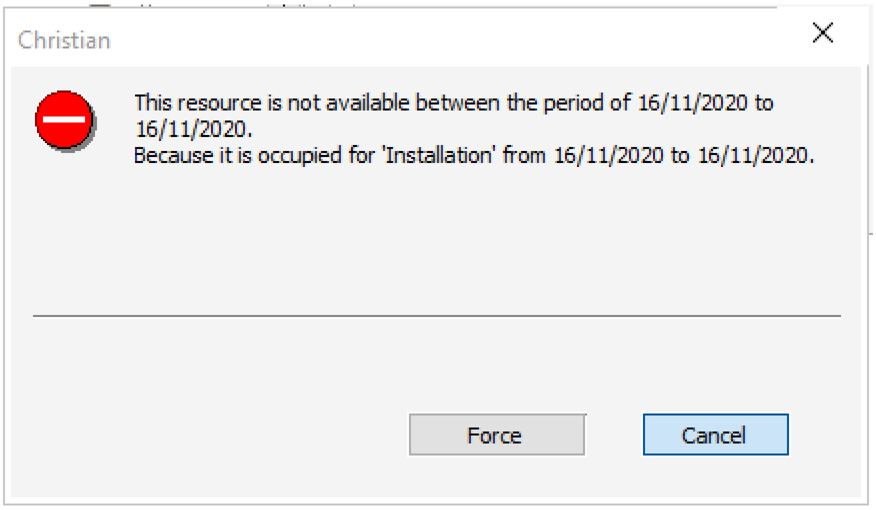

If you select the type of billing "Unit", the amount will be automatically calculated in function of the event duration.
If you select the type of billing "Package", you can enter directly the total amount.
You can then know the total amount by resource or by client with the statistics For more information, 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:

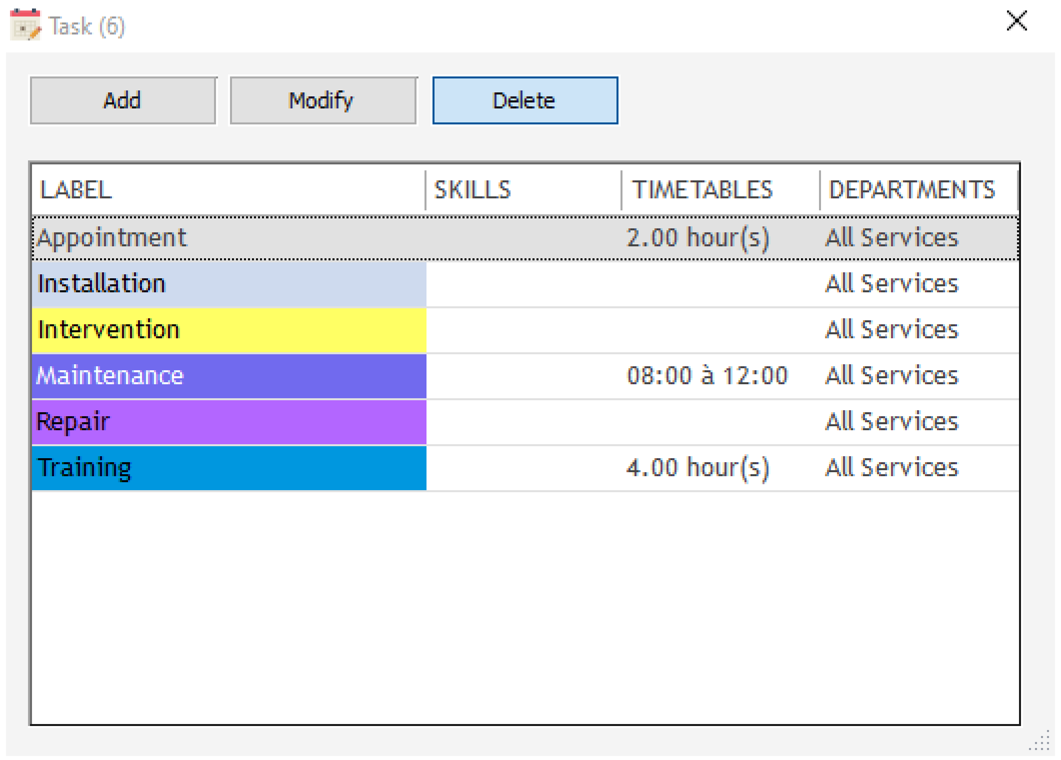



NB: If ever you select this option, you will also be able to create several events (if you have the permissions) but you will have this warning message each time asking you if you want to force the assignment or not:



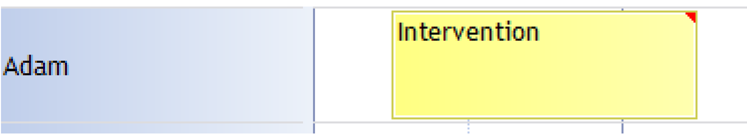

## Do not add new labels

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 wich events have a comment thanks to the red triangle on the right top corner of the box.

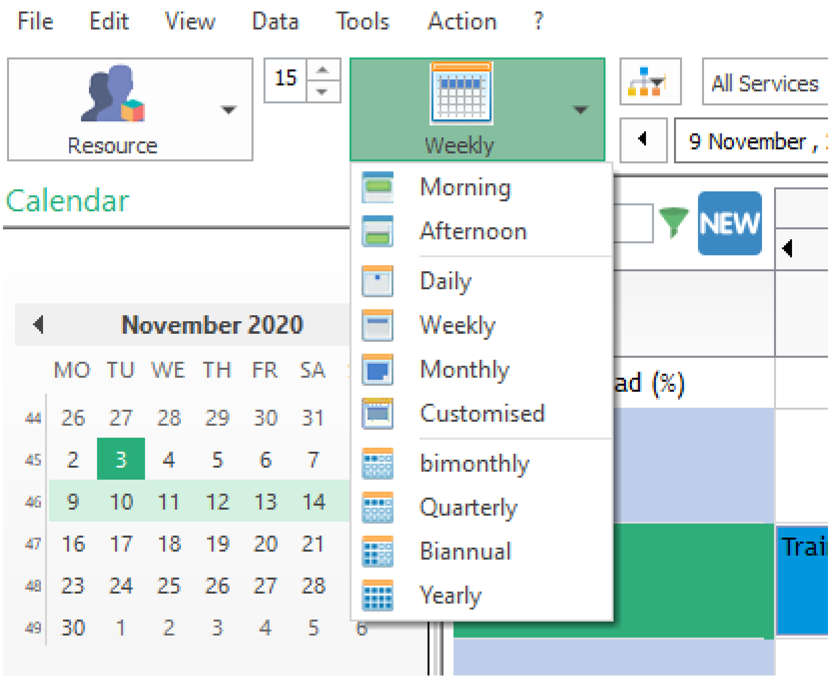


# Navigate easily, Change the views and Filter

## Navigation

### Change the time scale and dates

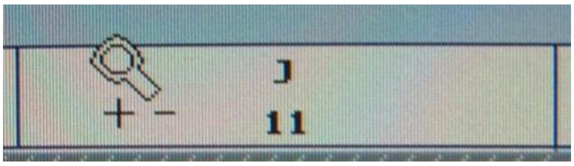
#### Time period displayed



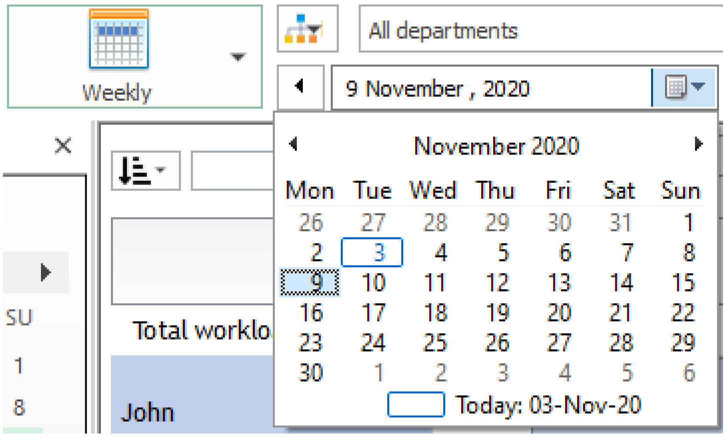

You can choose the number of days you want to display on your screen from a daily view to several years view. Selecting “More days” you can choose the exact number of days you want to display on your screen.

#### Zoom in/out

If you put your mouse on the dates bar directly, you can switch from a visualization to another clicking right on your mouse (-) or clicking left (+).



### Date choice

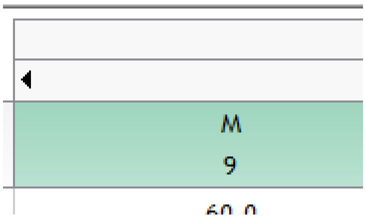



Choose the day you want your schedule to start from.
Clicking on the month or the year, go directly to the month or the year wanted.

### 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.

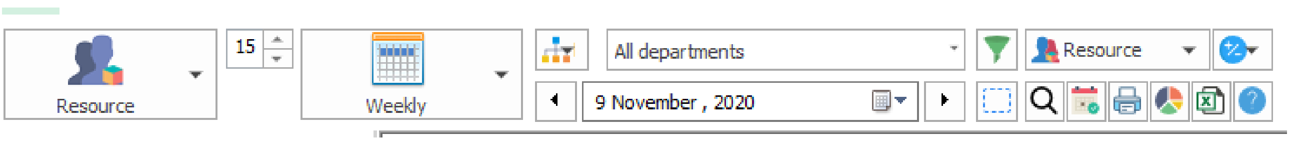
### Change the date from the arrows




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

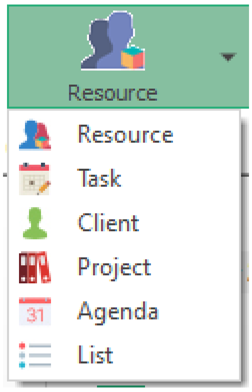
- Event View
- Client View
- Project View
- Agenda View
- List View

You can make your planning from all those different views.

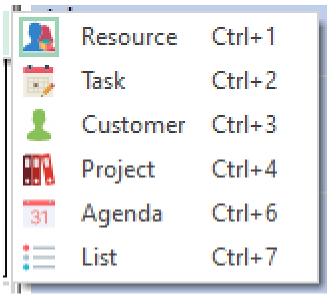
### Ways to change the view

Different ways to change the view:

**From the drop down filter:**




**From the menu View -> View**

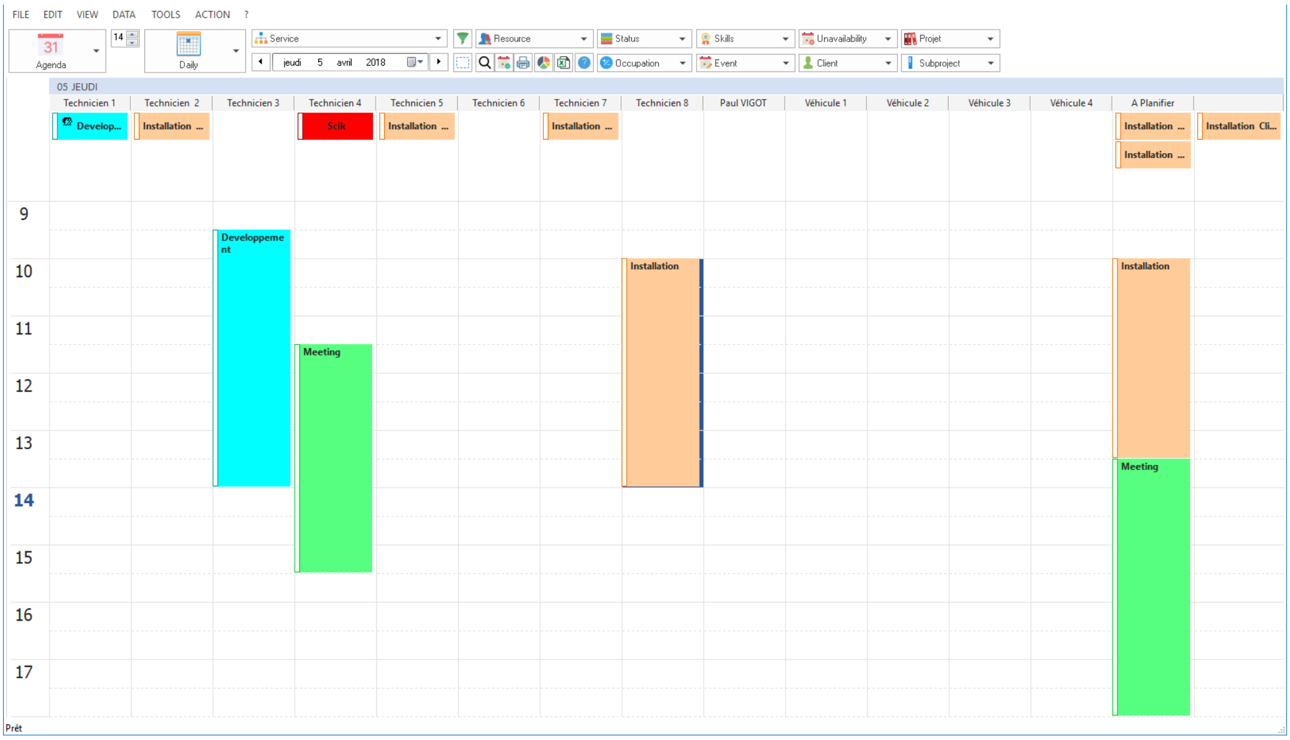



**From the keys shortcuts**

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”.



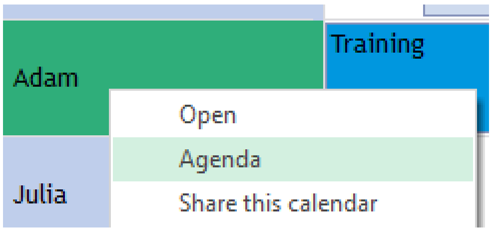

## Display the agenda View

### 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”

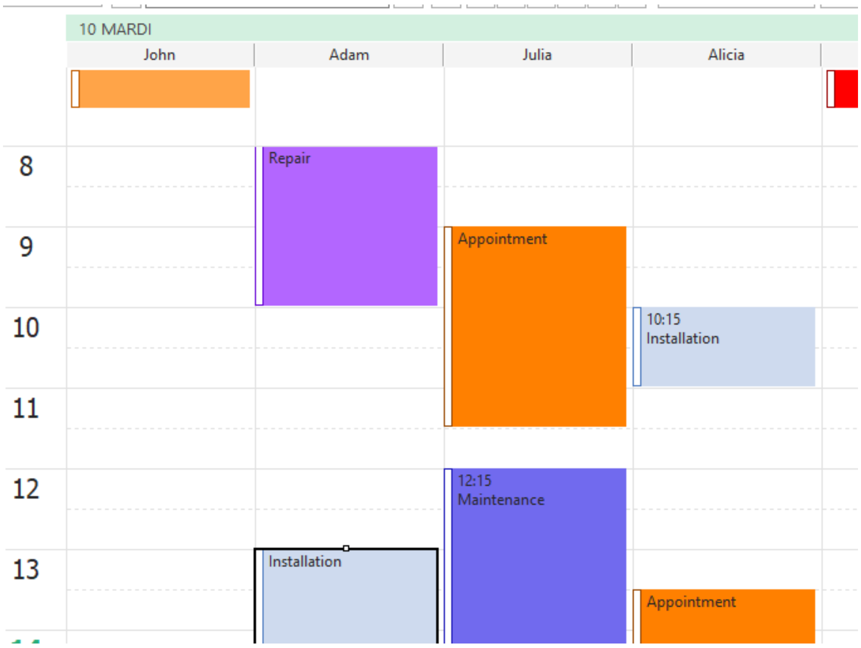



Then, the agenda of the resource selected will be displayed:

## Types of view

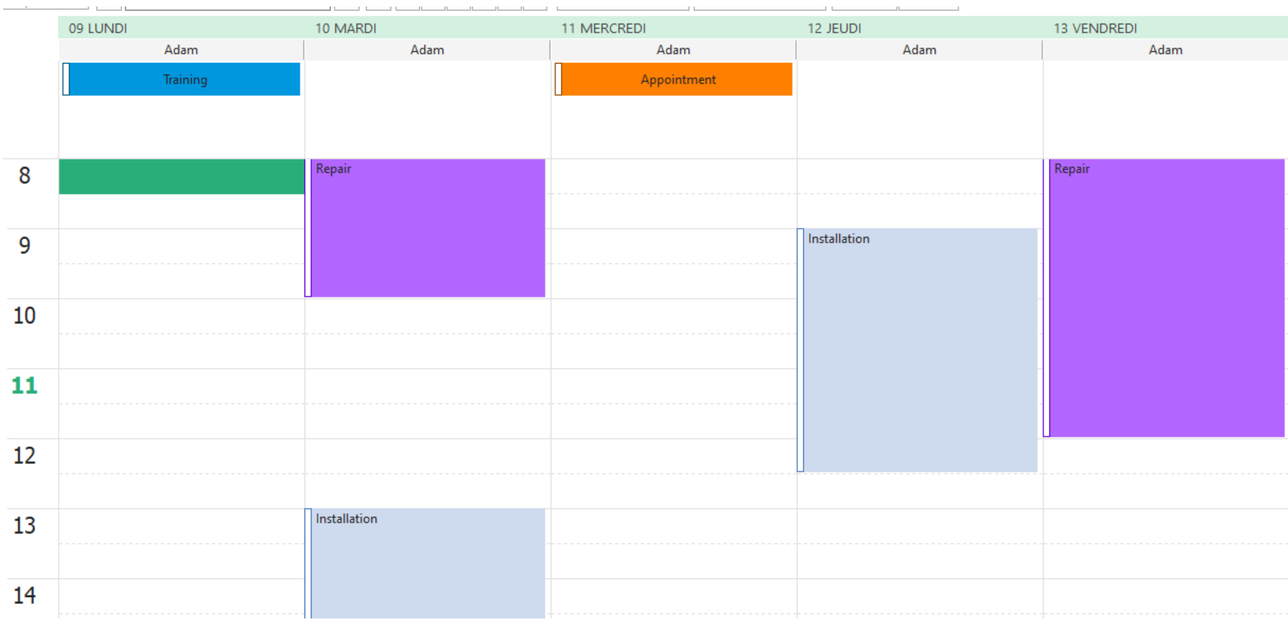
On the Agenda View, you have the choice between three types of view: daily, weekly and monthly.

### Daily View

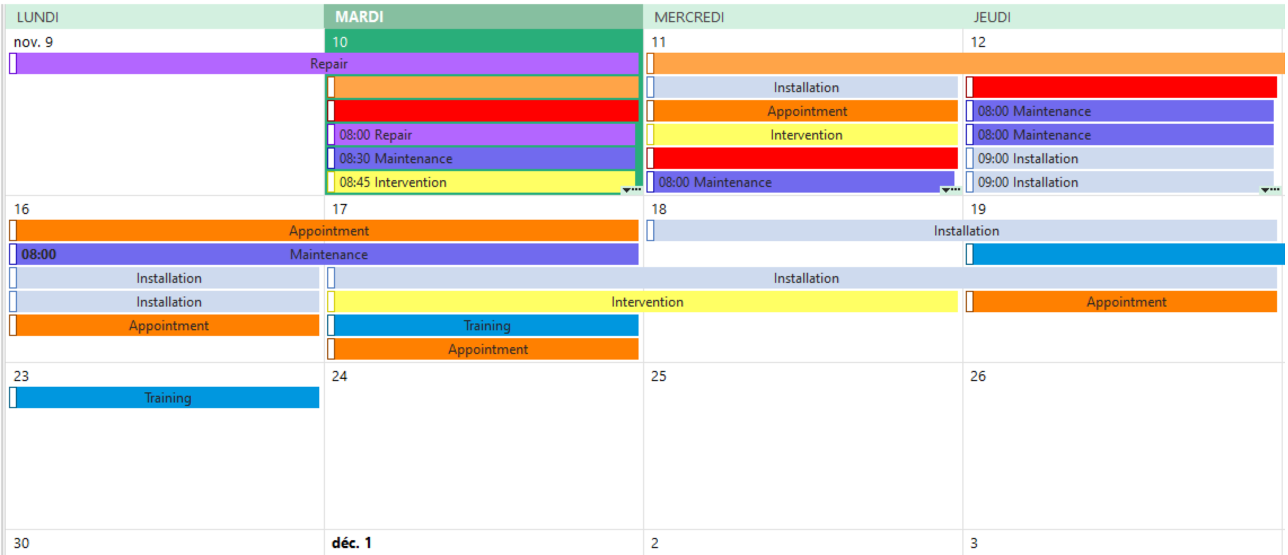



You can make a selection of the resources you want to display with the “resources” filter.

### Weekly view

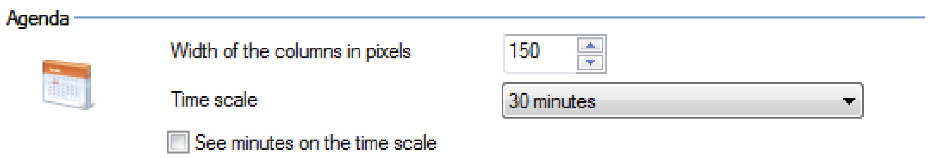


## Monthly view



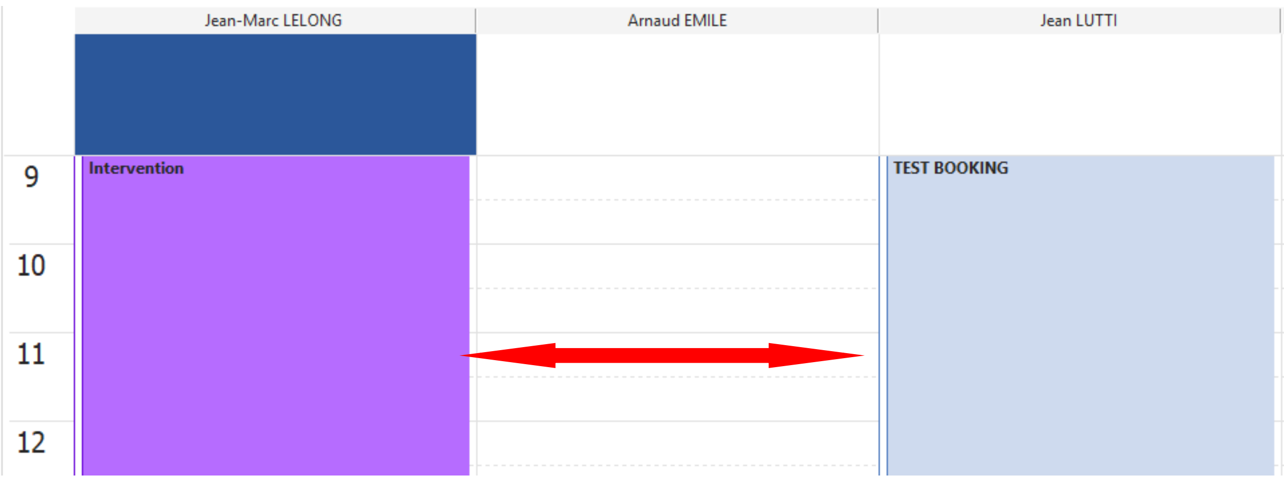

## Settings of the view

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



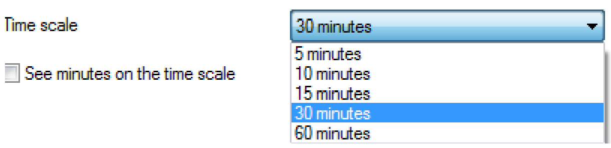

## Column width

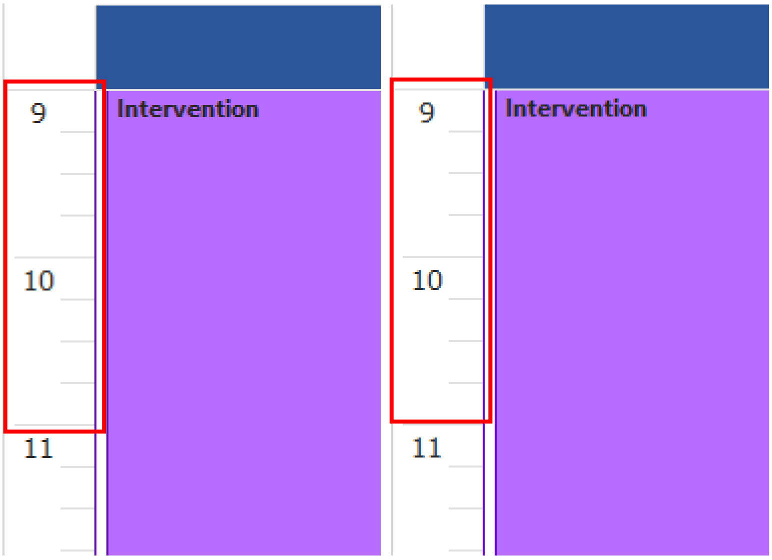
Select the size of the resource column:




## Time Scale

Select the precision of the display:






**See minutes on the time scale**
Select whether you want to see the minutes displayed or not.

## List View

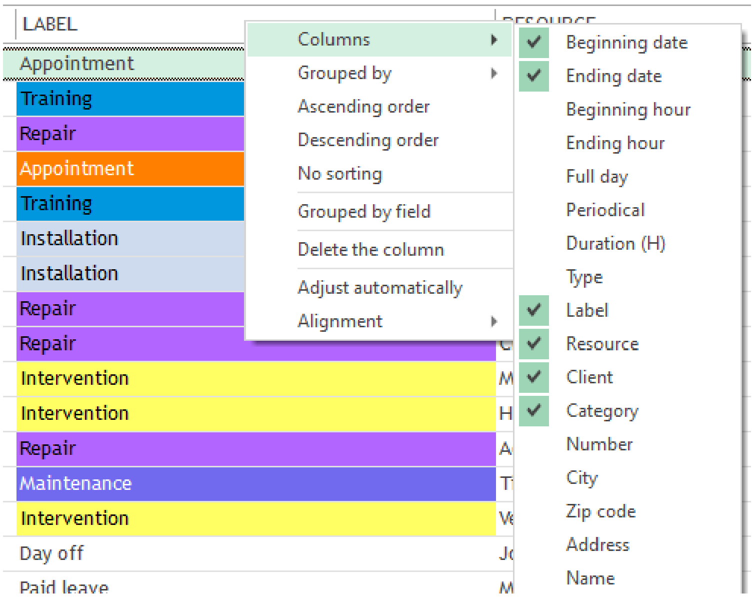
In addition to the already existing views (resources, tasks, clients, projects), Target Skills now has developed the “List View”.

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

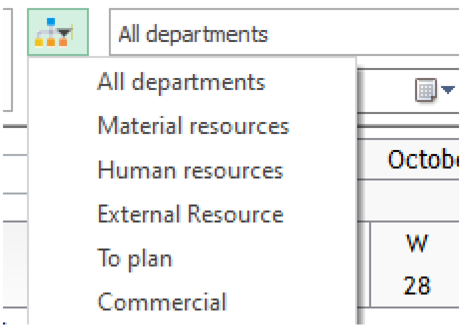
Double click on the event or right click and select « Open ».

### 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.

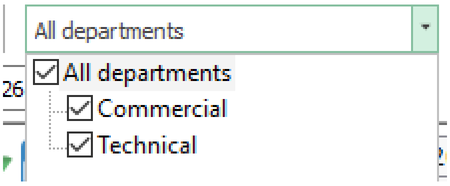
## Filters

### 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.

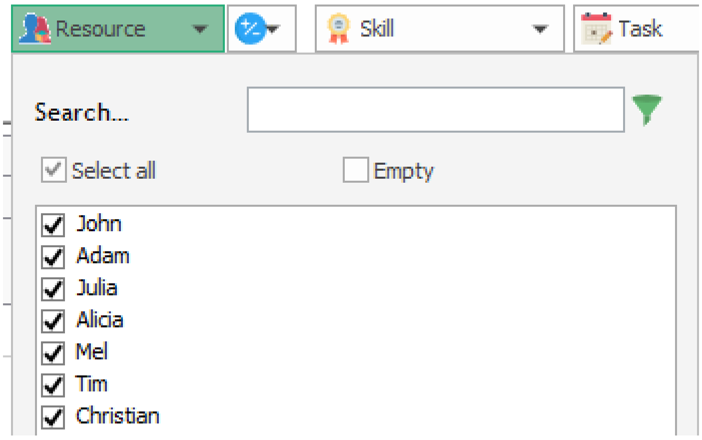



To display several departments, you can use this second filter :




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.

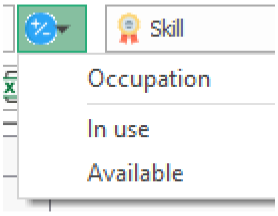
### Filter by client

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 ergonomy improved: Option to filter the lines

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

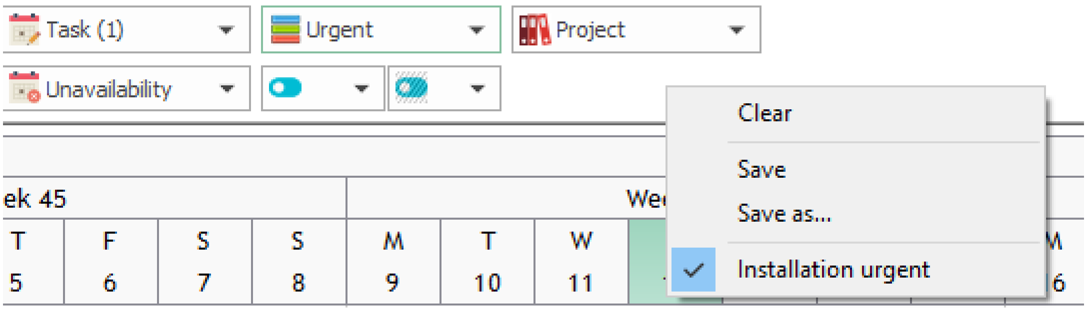
When using the filters in PlanningPME, once you make your selection, not only events will be filtered but also the lines.

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

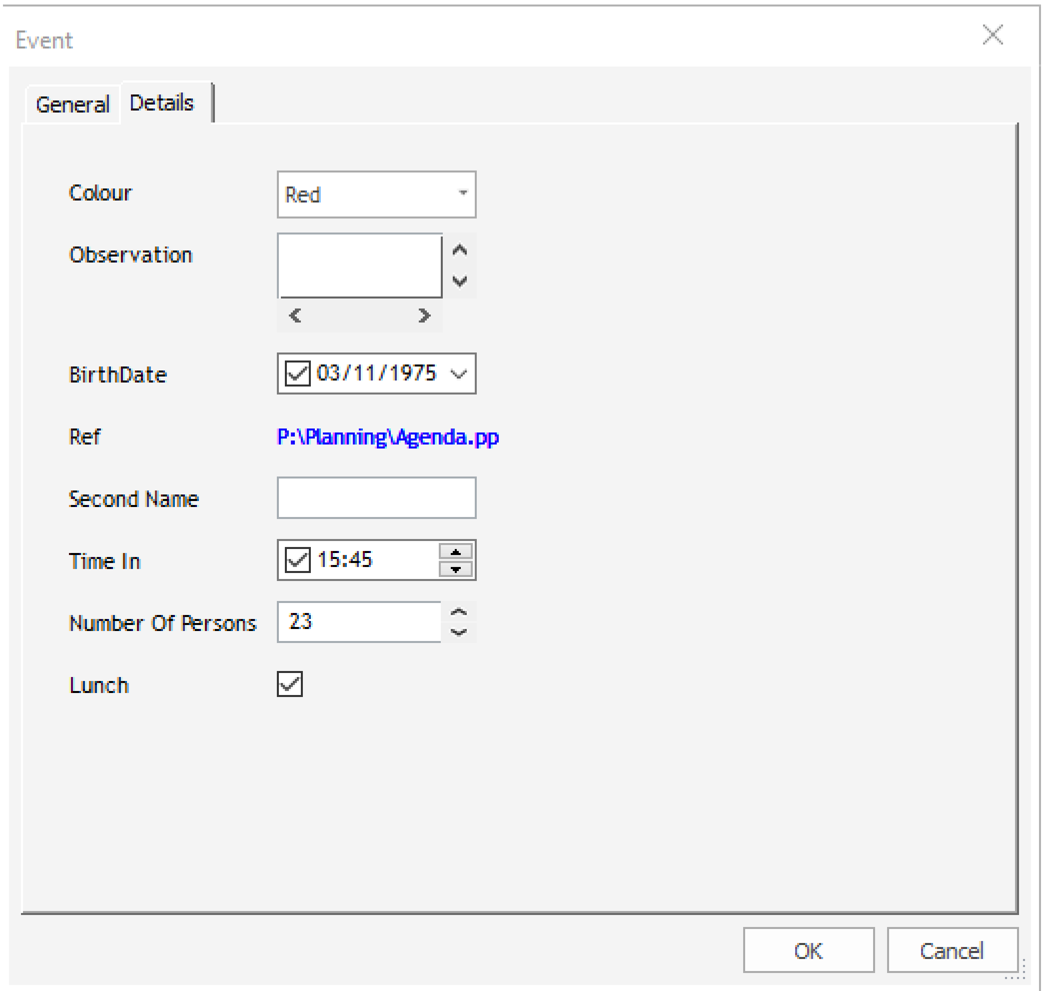
Read next Chapter on the creation of specific data to know more.

# 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:

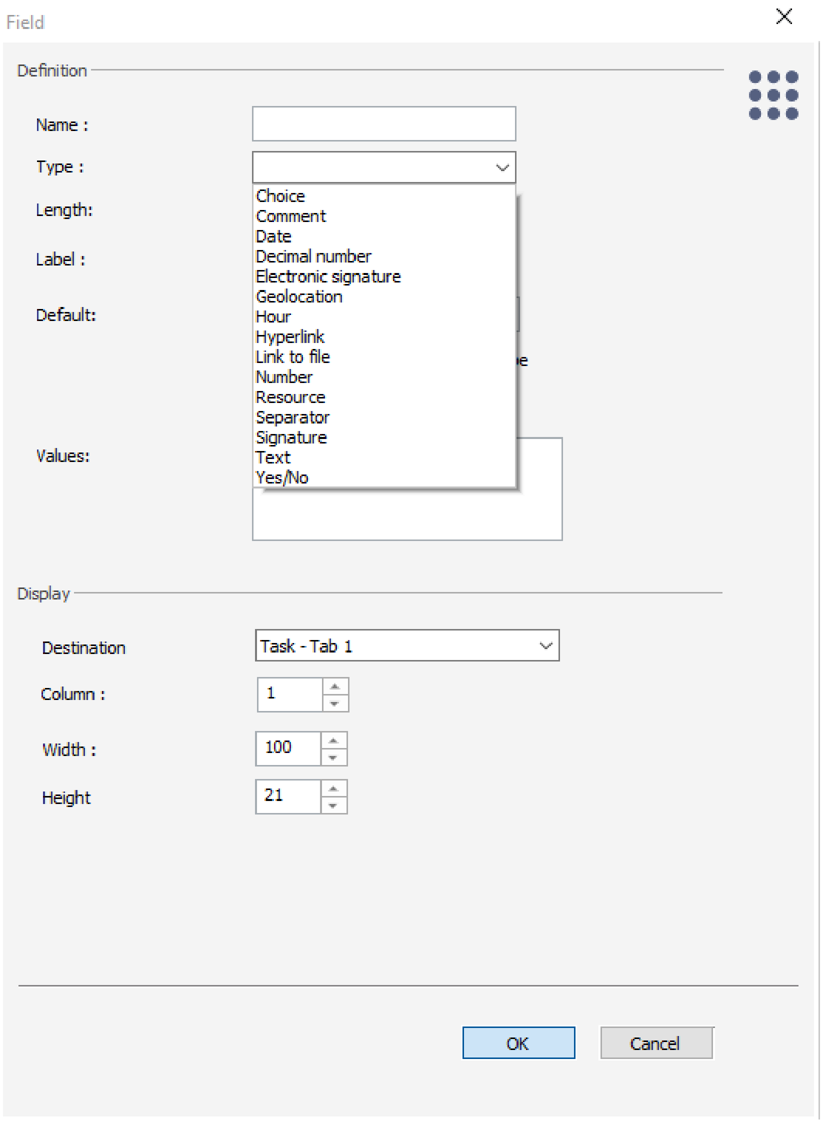
- Task
- Client (Possibility to associate a list of equipments)
- Human resource
- Material resource

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



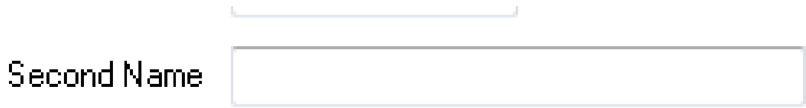

Aim of the additional fields' creation: Customize the schedule, display those fields on the schedule, in your reports and have statistics. The fields you are going to create can be of several types.

## Overview of the different types of fields available



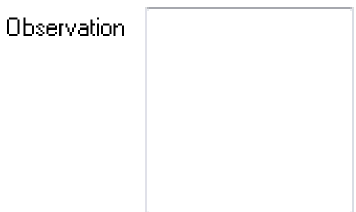

### Text

You can type information on one line:

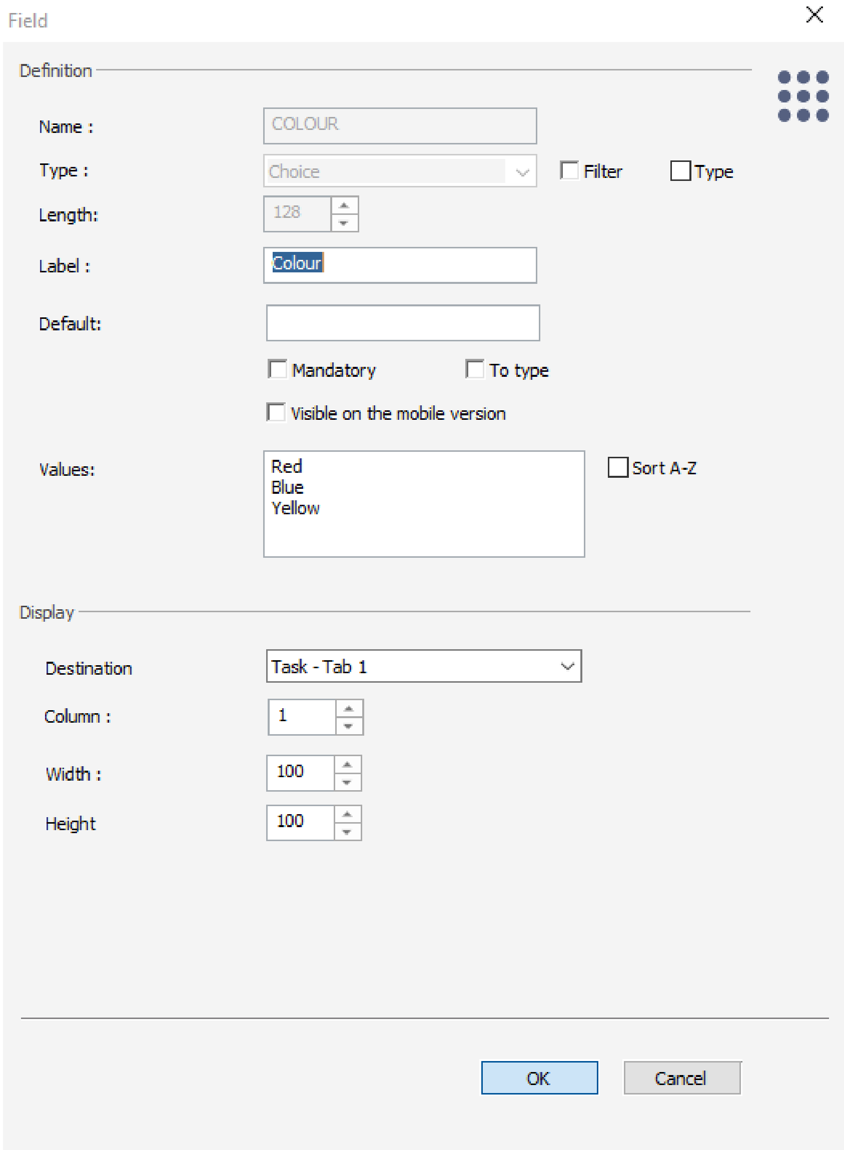



### Comment

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



## Choice




You will then have a drop-down list.

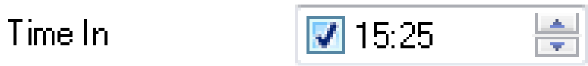

For this type, you must insert values (Start a new line between each value) in order to have a scrolling menu in the tab we are creating.

## Date

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

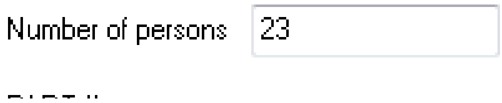
## Hour

You can specify a time:




## Number

You can type a full number:




## Decimal Number

You can type a decimal number:


## Yes/No

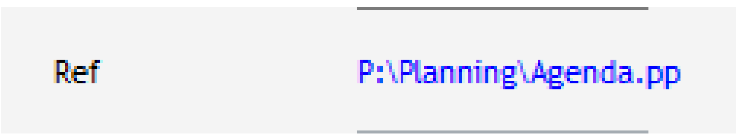
You can then tick on the field:


## 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.




## 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.


## Geolocation

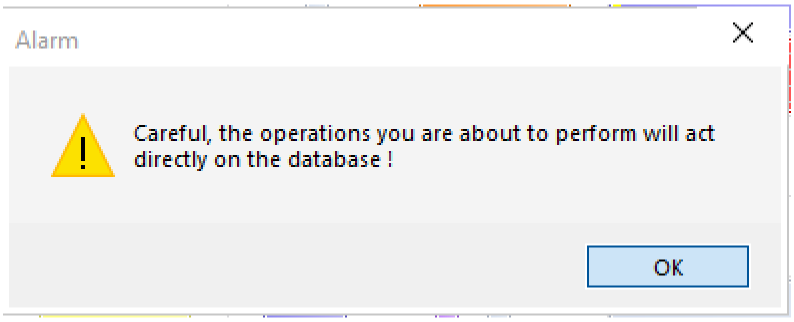
This additional field is linked to the mobile version of PlanningPME. Indeed, it will be possible to geolocate your employee when he performs a job. The data on his location will then be displayed here once your employee check in or out.

### 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.

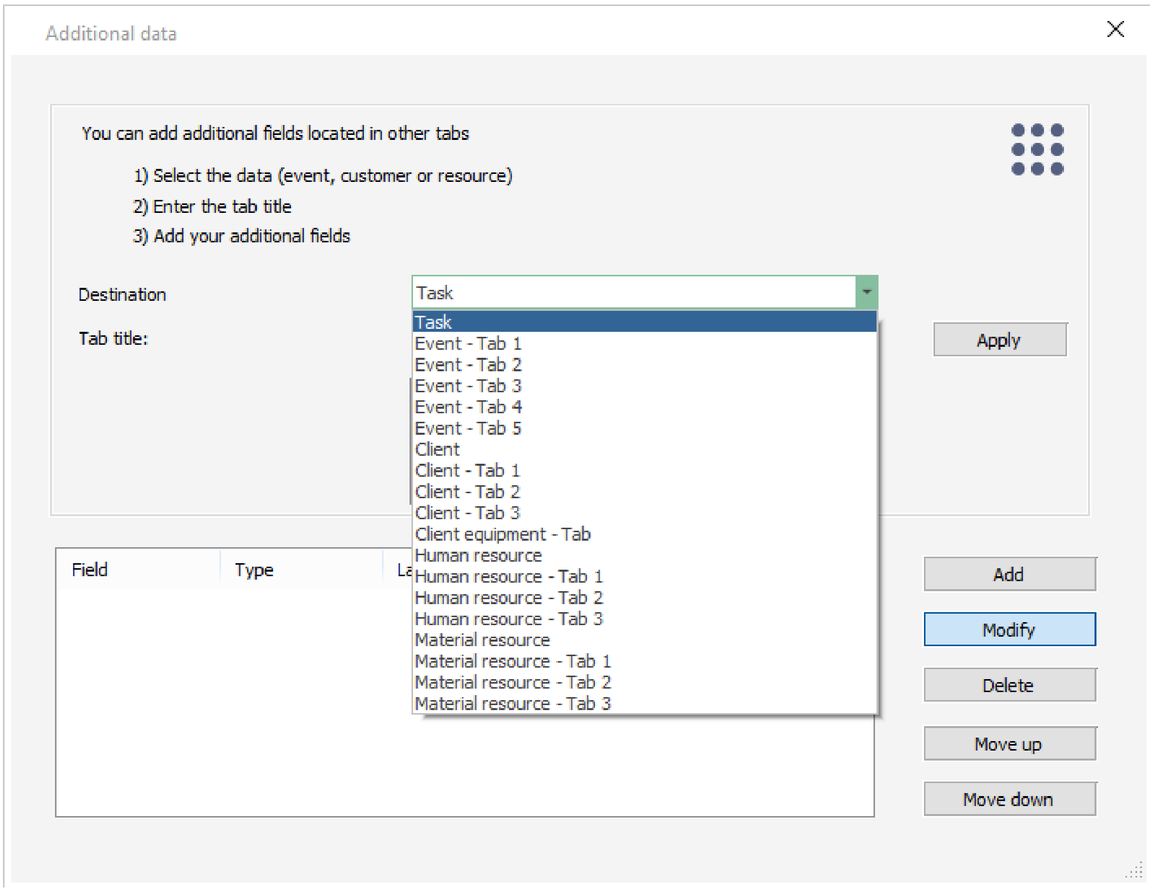
## Create additional fields

From PlanningPME, go to the menu "Data" -> "Additional fields »:
This warning message appear. Press “OK” and begin the set up.



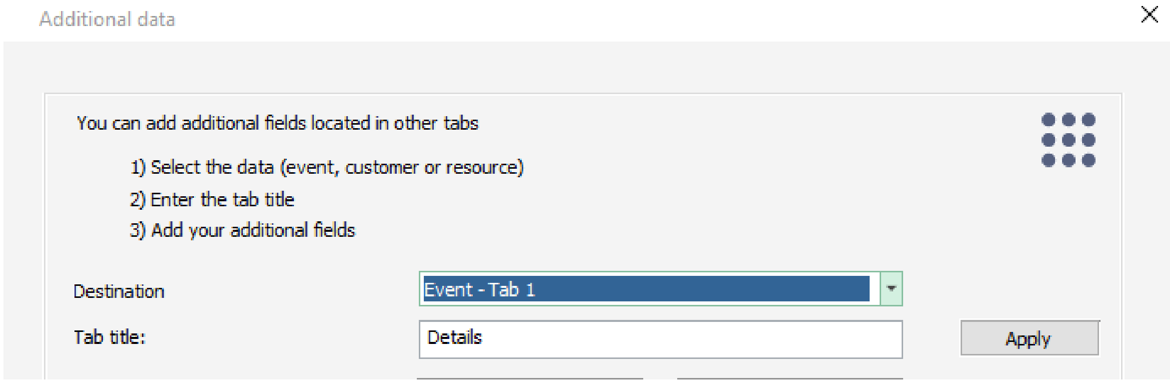

### Select in which window to have your new fields

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.

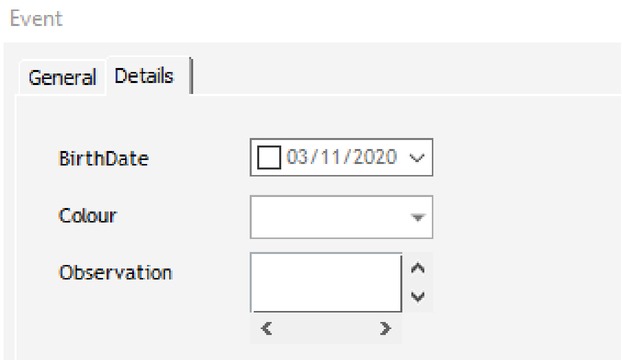



**NB : Do not use any punctuation sign (accent, points...)**

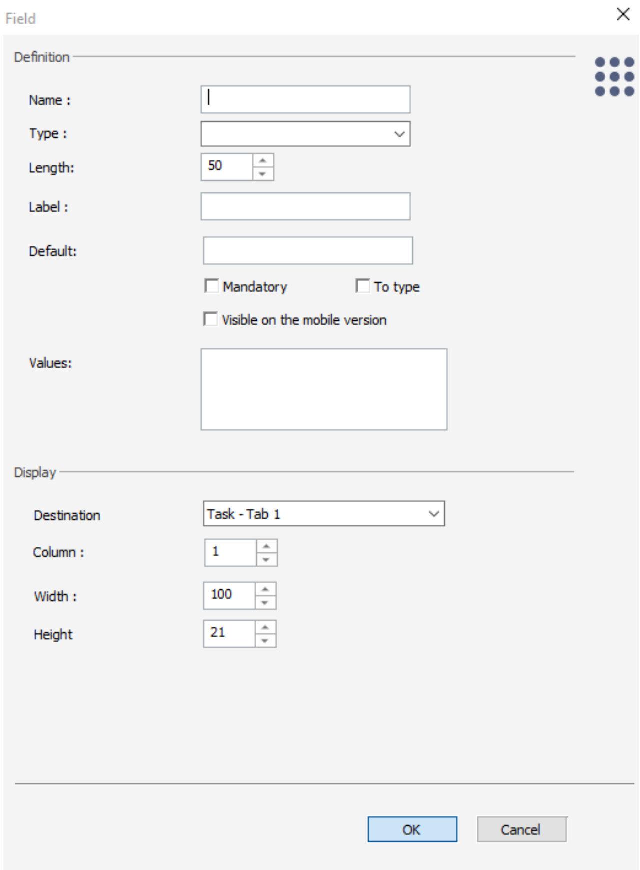
## Enter the Tab Title




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



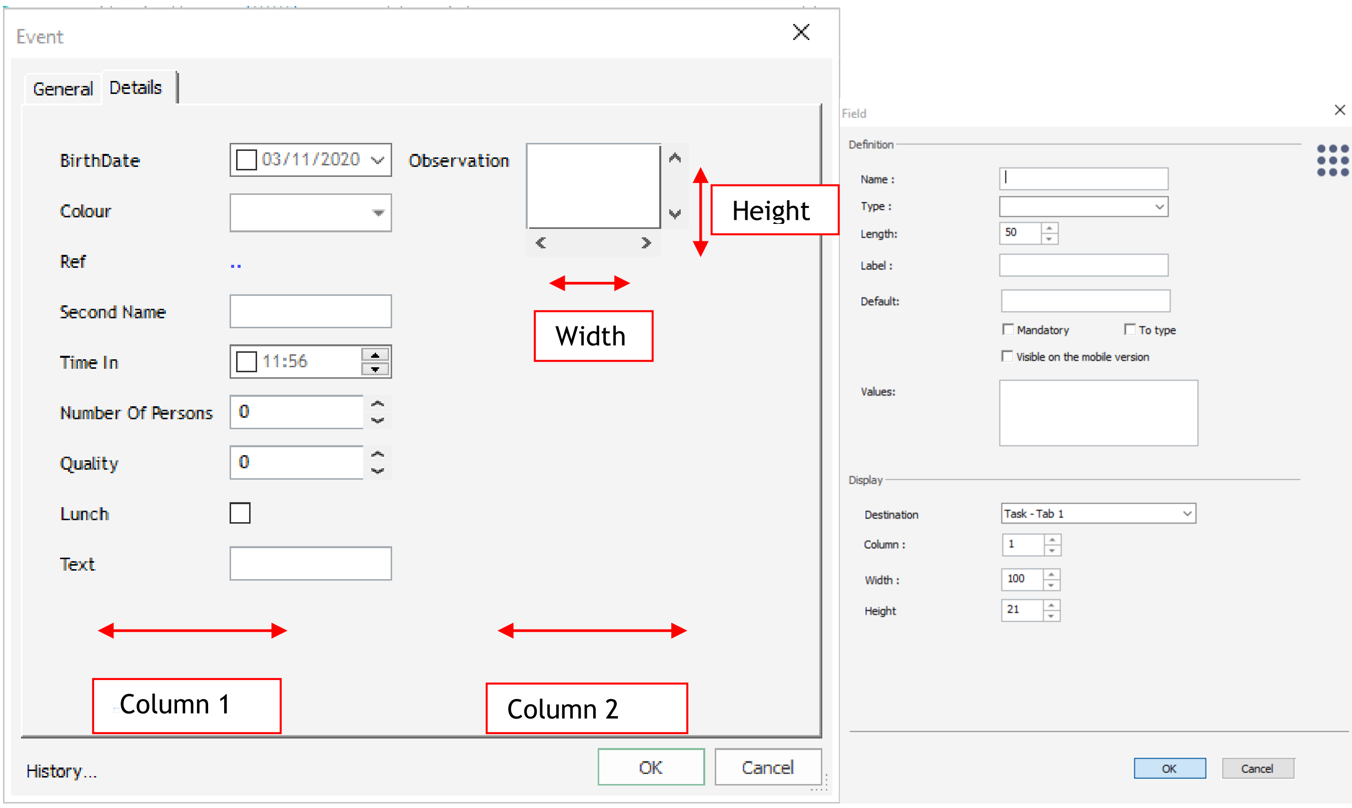

## Create your new fields within this tab



## Settings available when you create a new field

### Column, Length, Width, Height

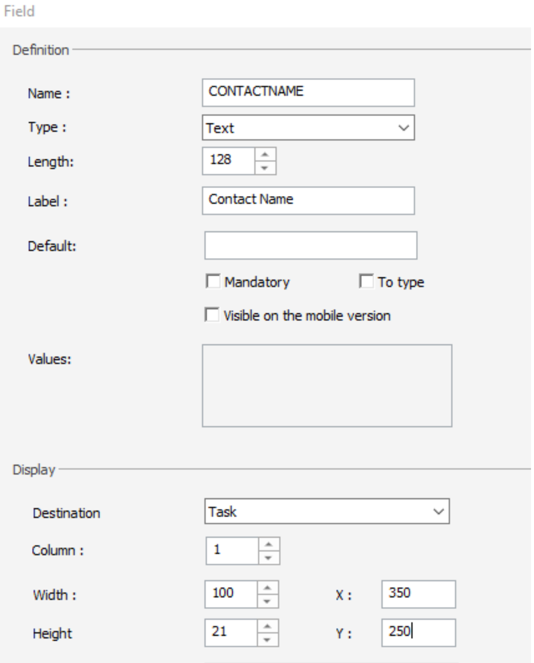
You can specify those information while creating additional field:

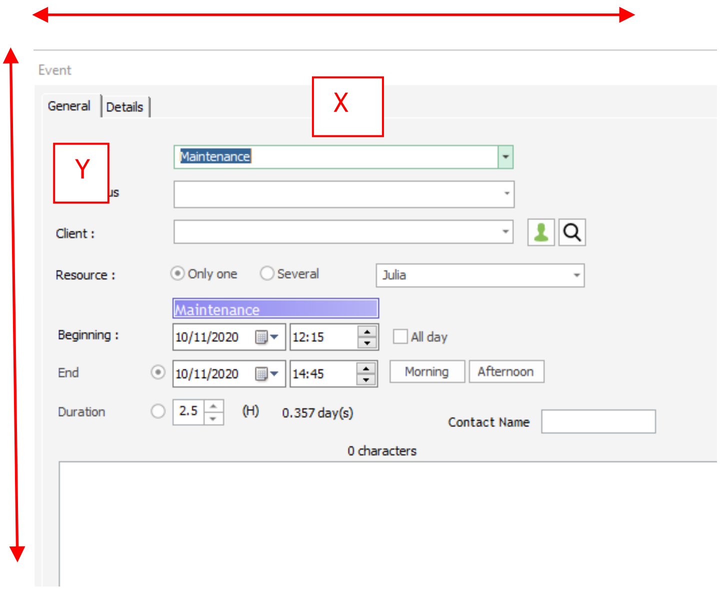



Length: This one is a more technical field: this is the length of the path within the database. Do not change it unless you are familiar with this data.

## 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

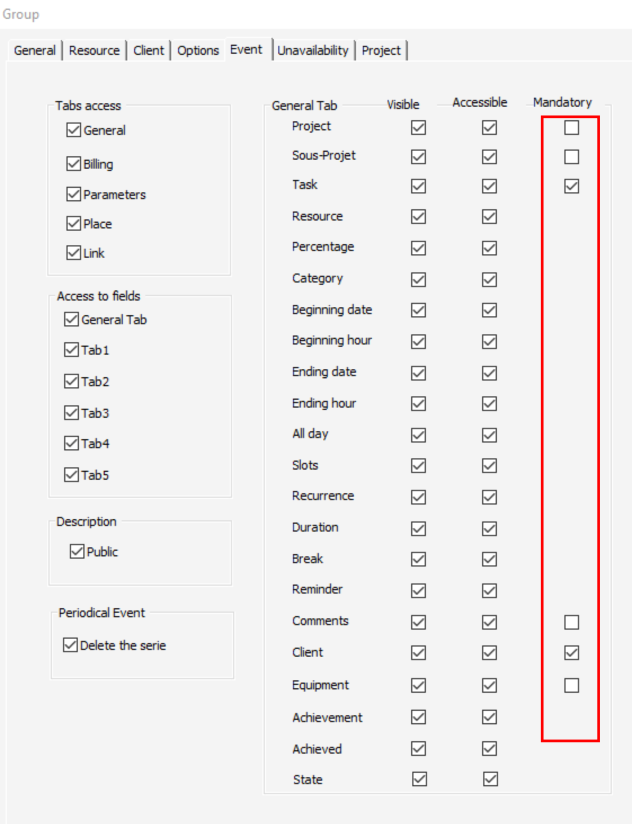


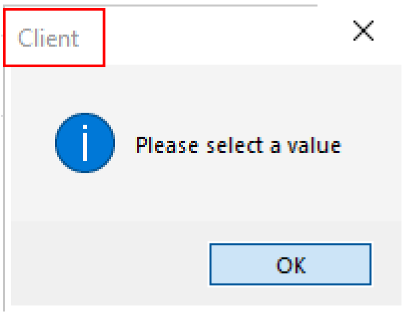

## Mandatory field

### -> Mandatory standard fields

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



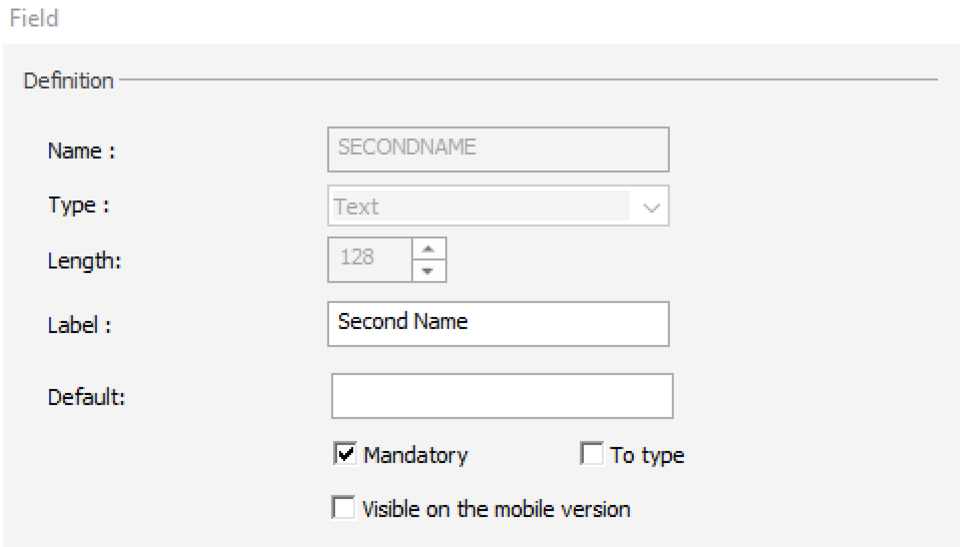
Then, while creating a new event on the planning, if one of the mandatory field is not filled in, you will have a message asking you to fill this field otherwise the event will not be created.



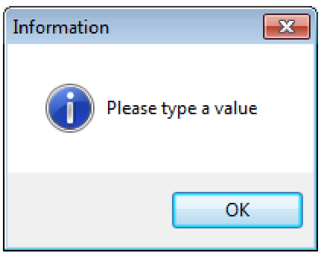

As you can see here, the client must be filled in.

**-> Mandatory additional fields**

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




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



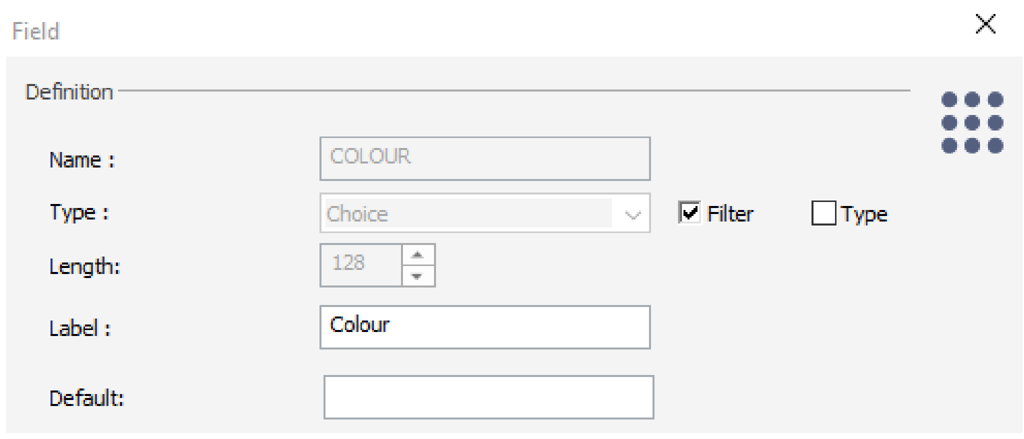

So, you can force the users to fill some specific data.

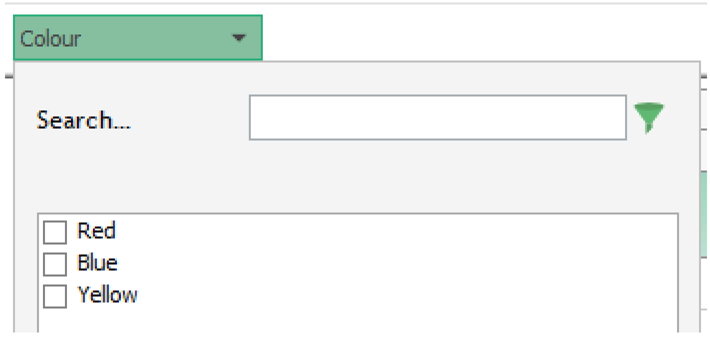
## Visible on the mobile version

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.




Zoom on clients equipments

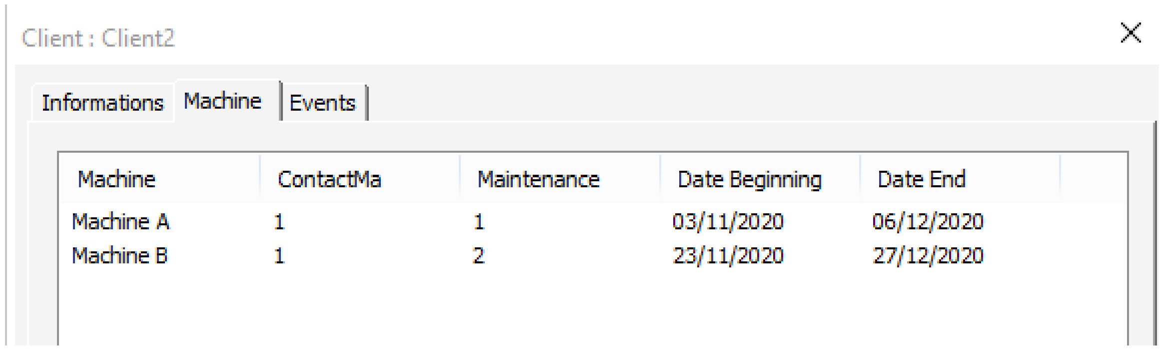
**Client Equipment:** This word "Equipment" can be all kind of objects, equipments that you wish to link to your client: machines, contacts, contracts, files, projects...

## What is it used for?

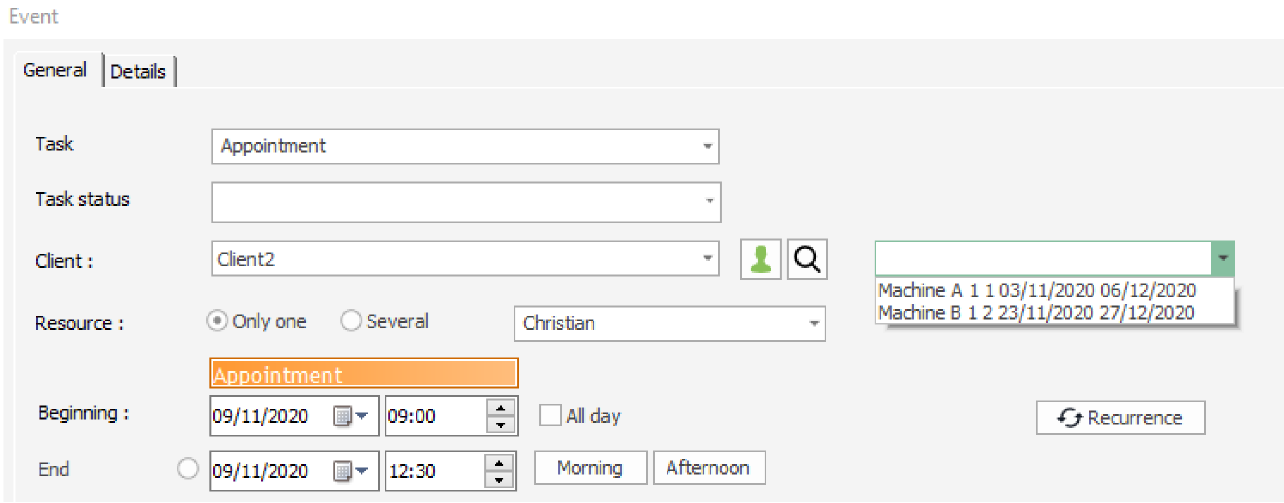
For each client, you will be able to create a list of the different acquisitions or "equipment" in details.

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:



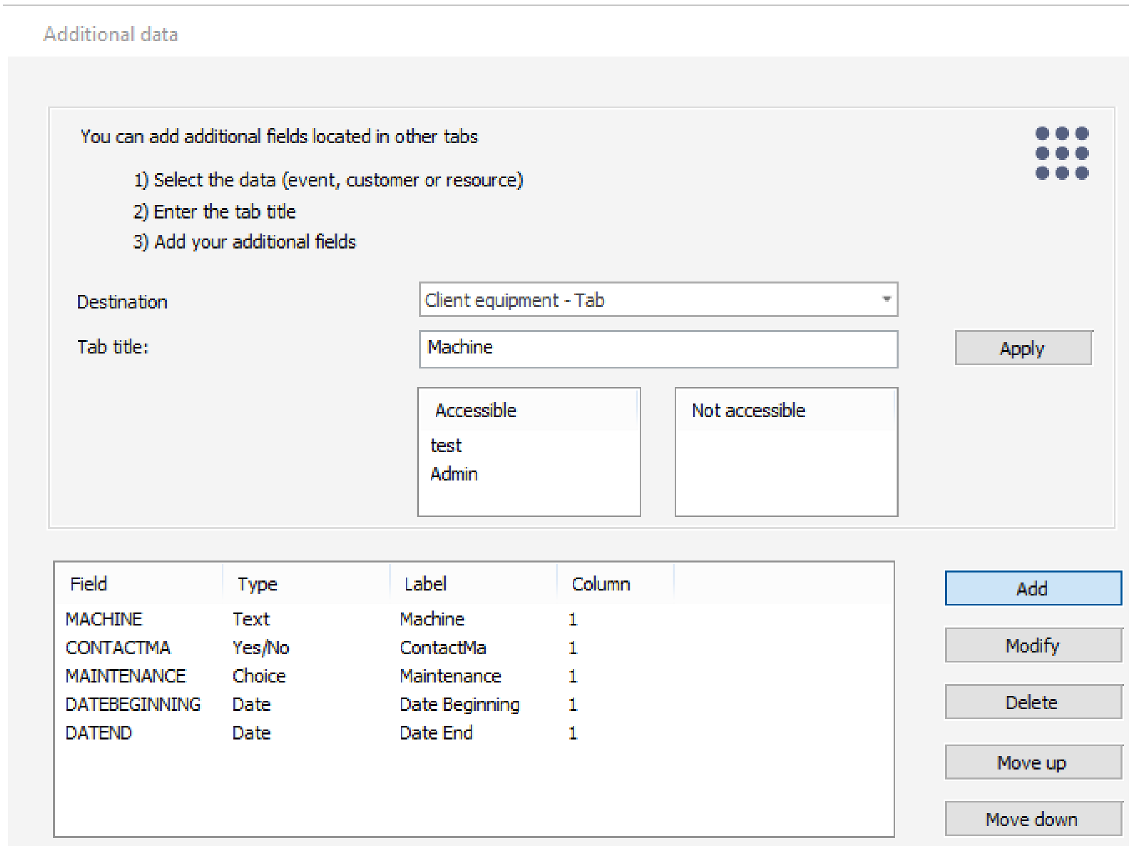

And when creating a new job, you will be able to select a client and then the equipment you are working on:



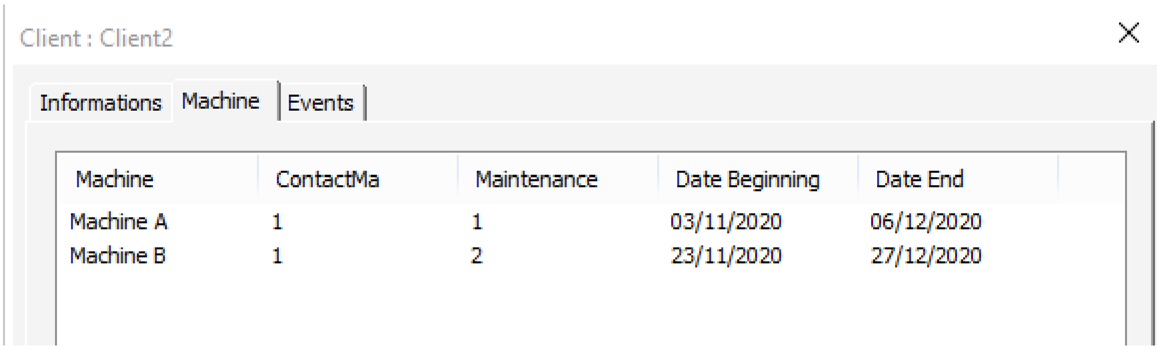

## How to create those "Equipments"?

From PlanningPME, go to the menu “Data” -> “Additional fields” -> Client equipment - Tab

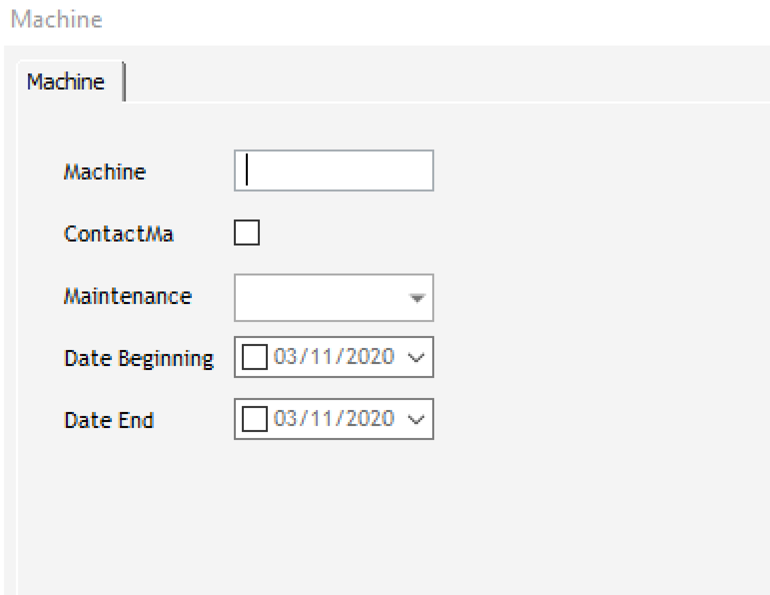
Create all the data you would like to have on each equipment:




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

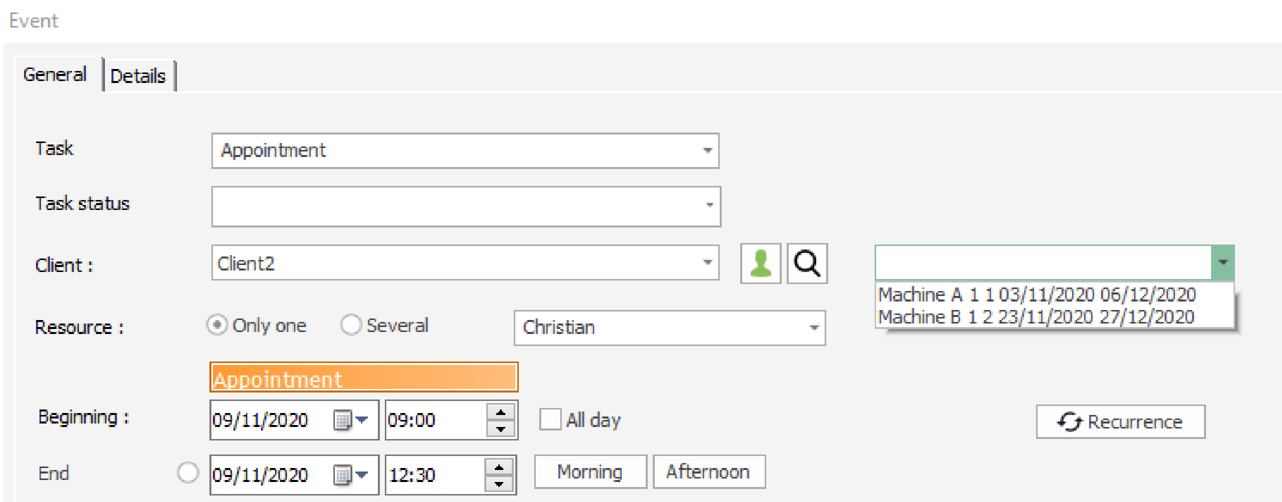



To add new equipment, click on “Add” and fill in the information:



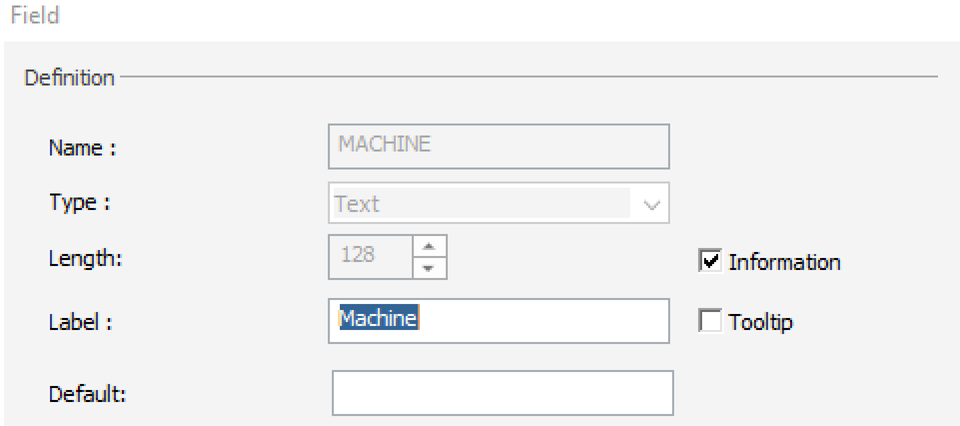

## Select an equipment while creating a new event

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

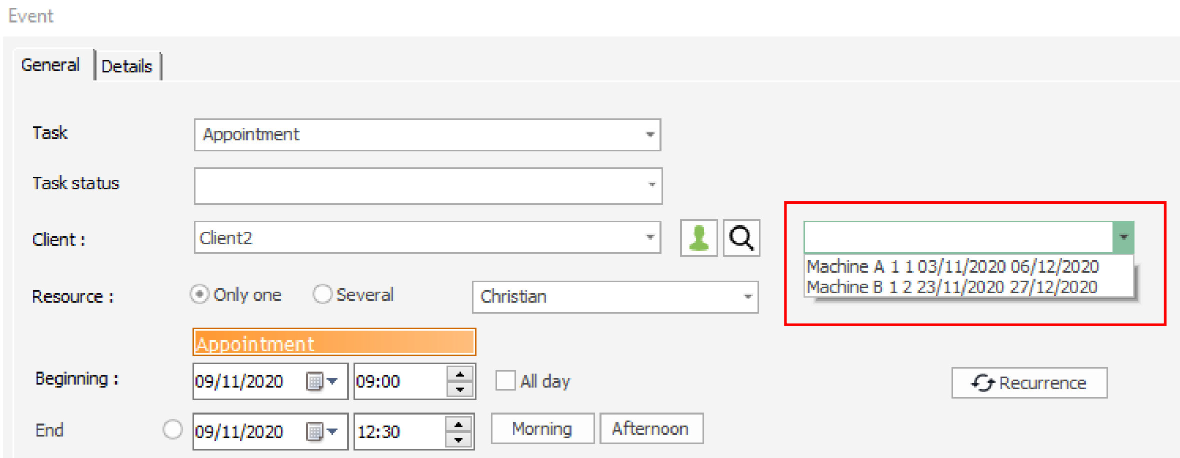


## Select the fields to display on the event window

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

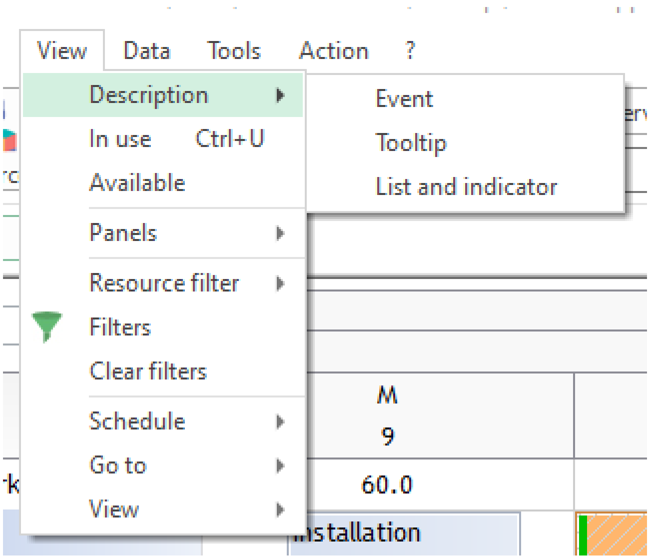



And you will see it here on the drop down menu of the event window:




## 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.

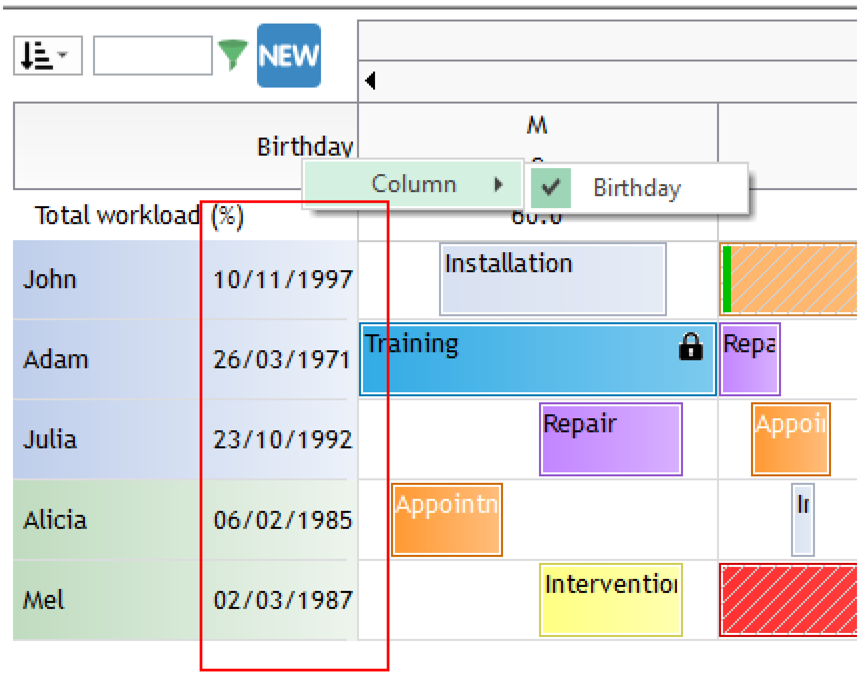



## Quick view of the extra fields

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

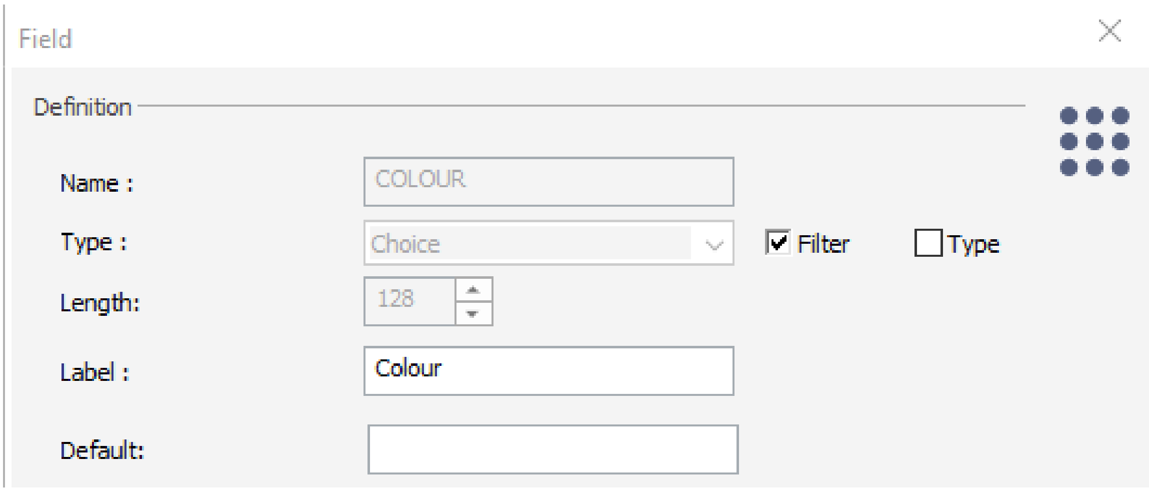
You have different kind of filters on extra fields available.

### Create customised filters from fields of the type “Choice”

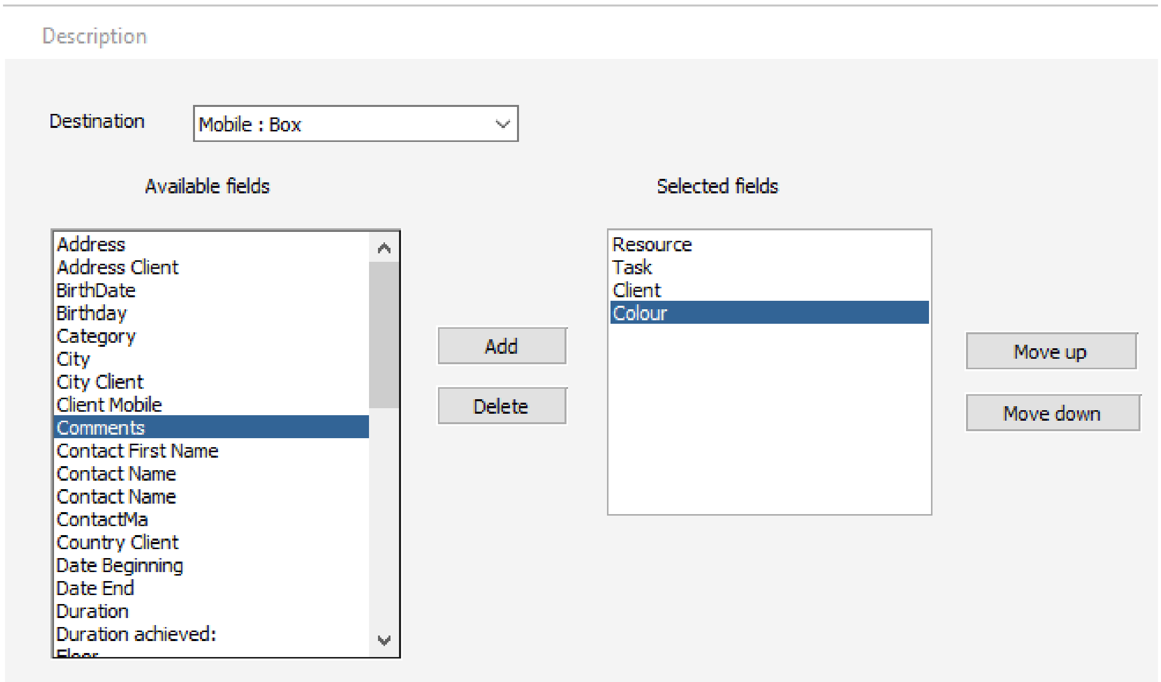
While creating additional fields of the **type “choice”,** if you select the option “Filter”, you can show them on the planning board to filter the planning with those specific data.

### Activate the filter

Activate the option from here:




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



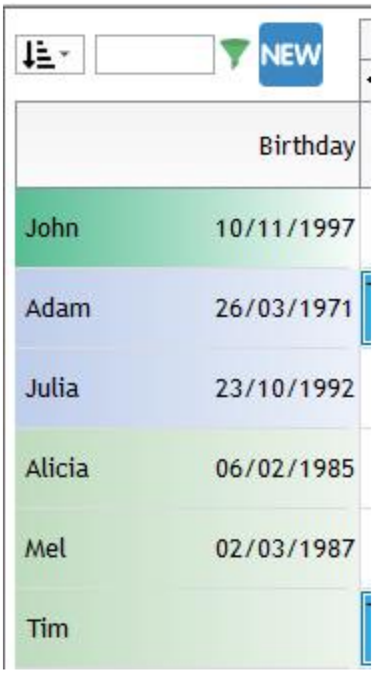

### Visualisation of the filter

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:




## 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

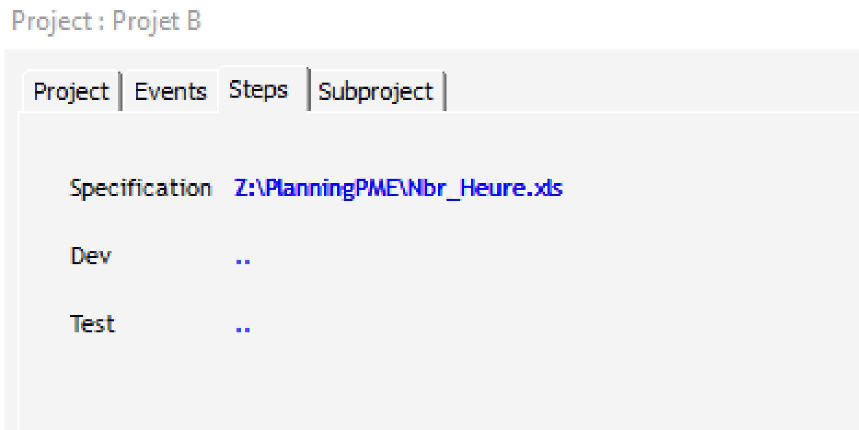
## Introduction

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

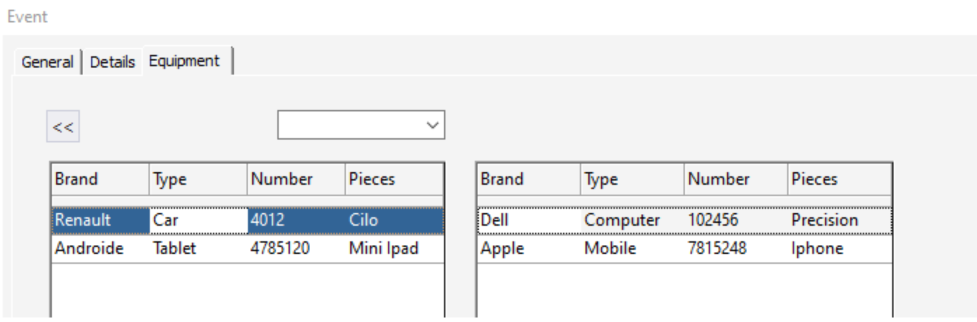
1) Managing project steps

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



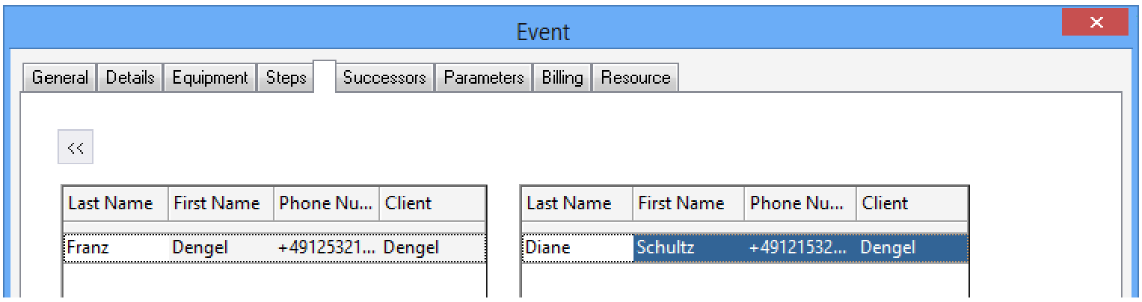

2) Managing equipment

Manage the equipment and assign it to employees



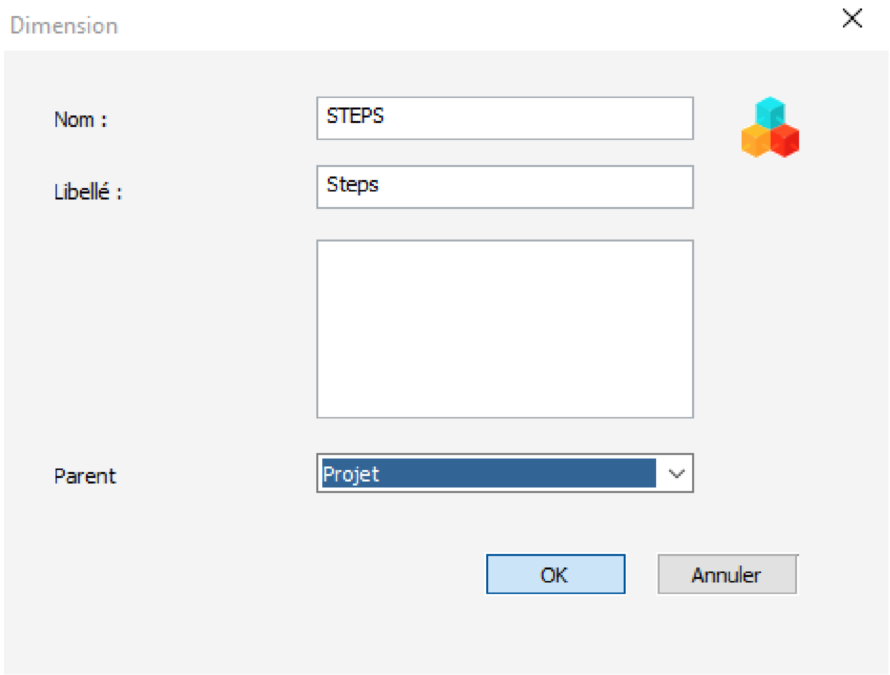

3) Managing training attendees

Input attendees to your training without considering them as resources.

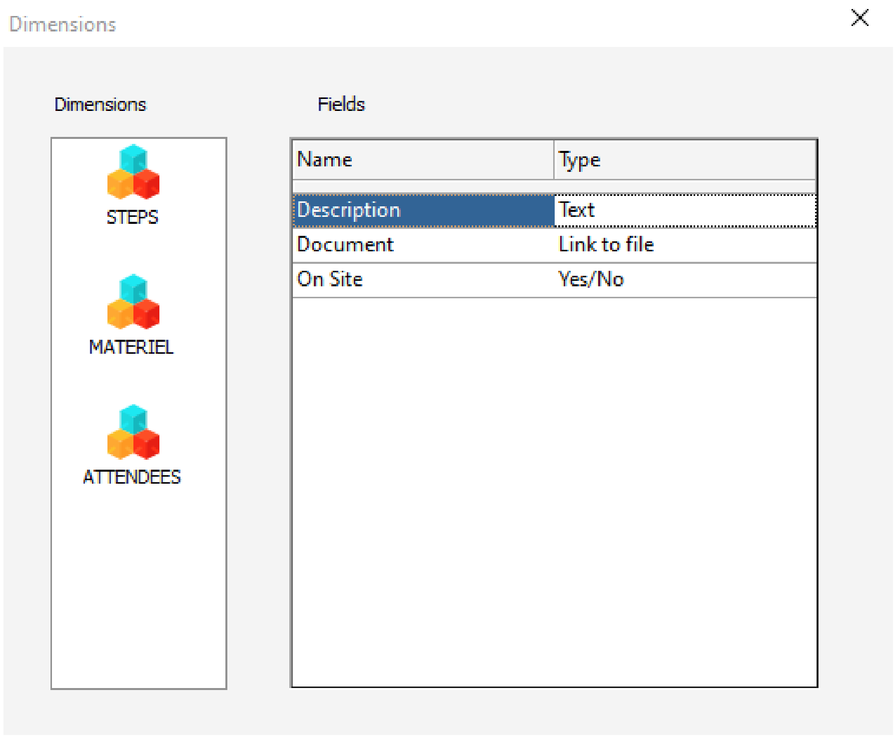


## Practical case: project steps

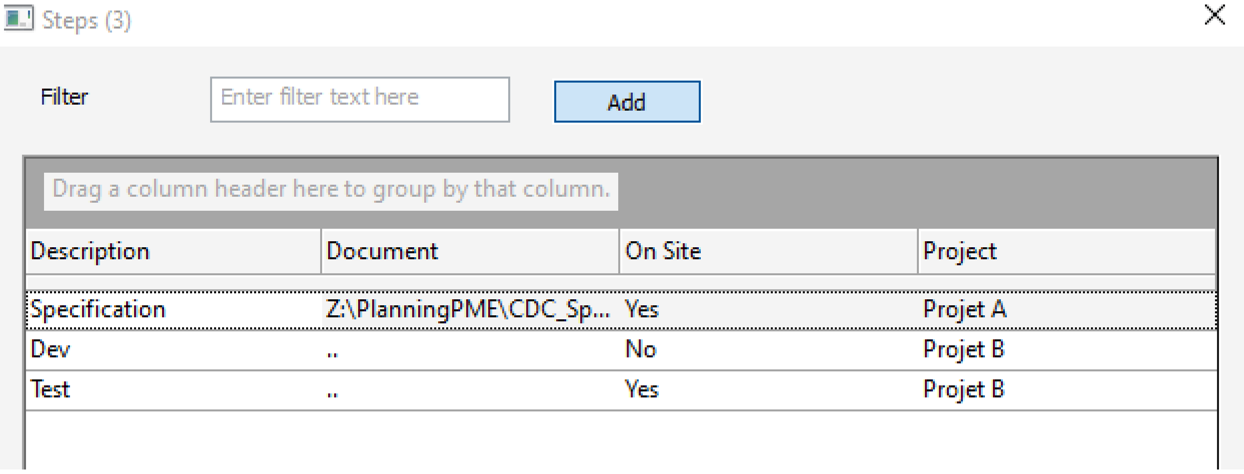
Would you like to plan main steps for your projects by adding attached files?
PlanningPME not only allows you to manage projects but also to create a PROJECTSTEP dimension in which you can input your projects steps.
Go to the Data-Menu > New Dimension and add a new PROJECTSTEP dimension stating the **project as a parent**. PlanningPME will create this new table in the database as well as the associated fields.

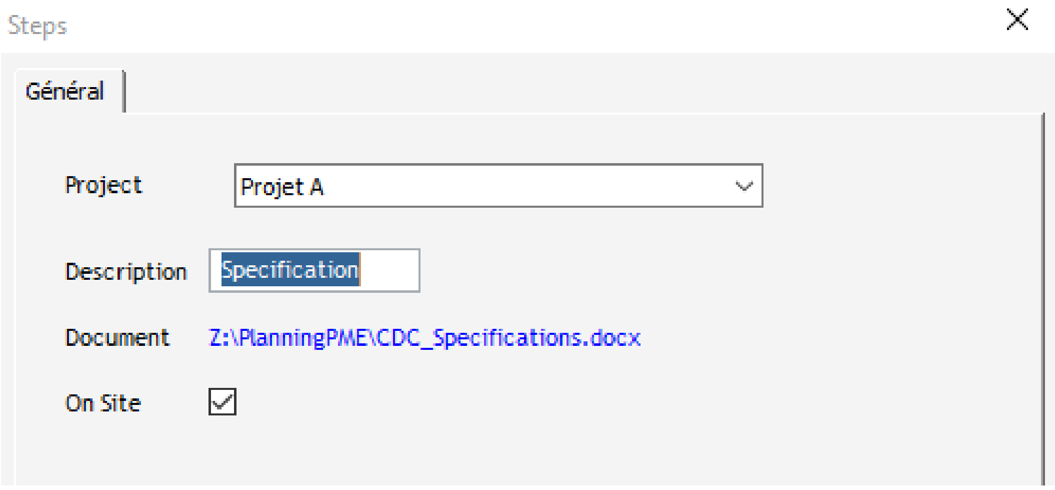



You can now add fields to the PROJECTSTEP dimension:



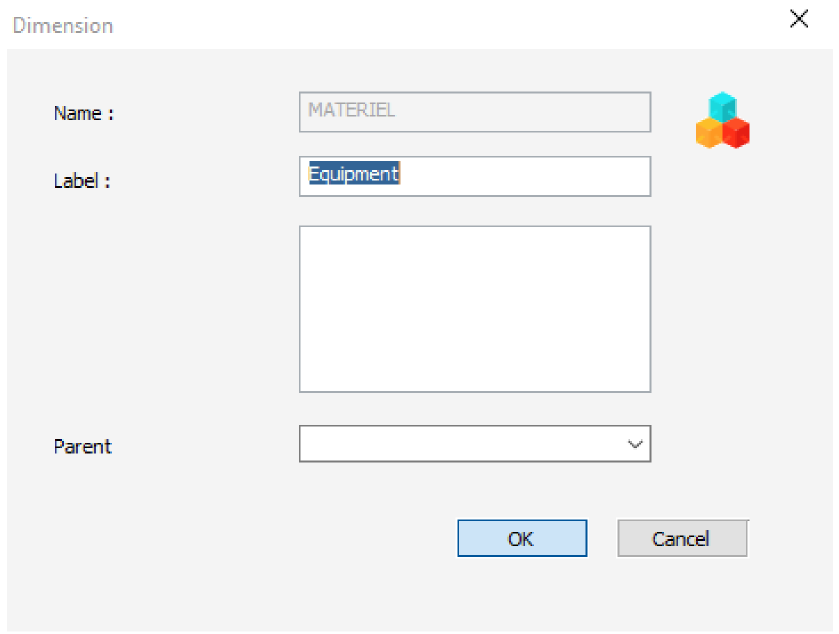
You can also input steps for your projects:



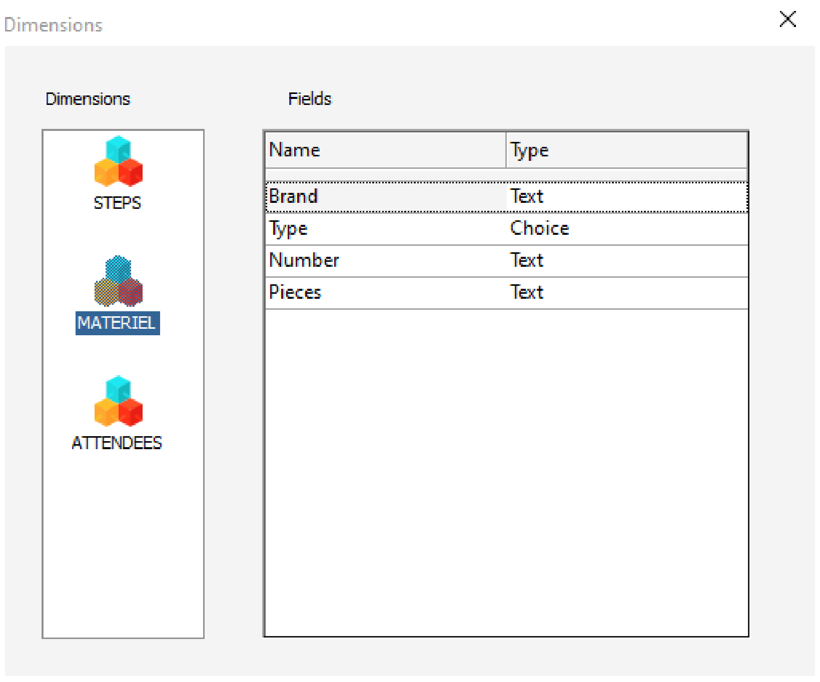



## Practical case: assigning equipment to resources

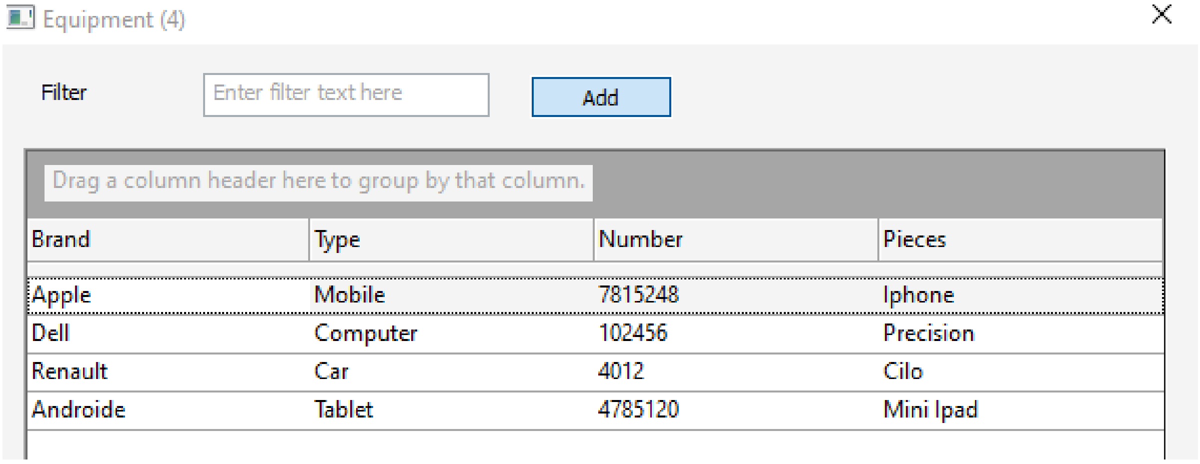
Each firm own equipment like computers, mobiles, pads, cars… These are aimed to employees but don't need to be visible in the planning.
PlanningPME allows you to create an EQUIPMENT dimension in which you can input the equipment list.
Go to the Data-Menu > New Dimensions and add a new EQUIPMENT dimension stating **no parent**. PlanningPME will create this new table in the database as well as the associated fields.



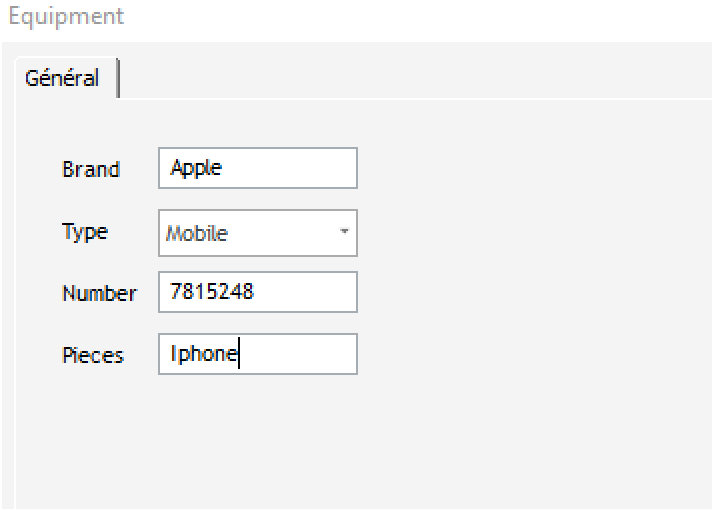

You can now add fields to the EQUIPMENT dimension:



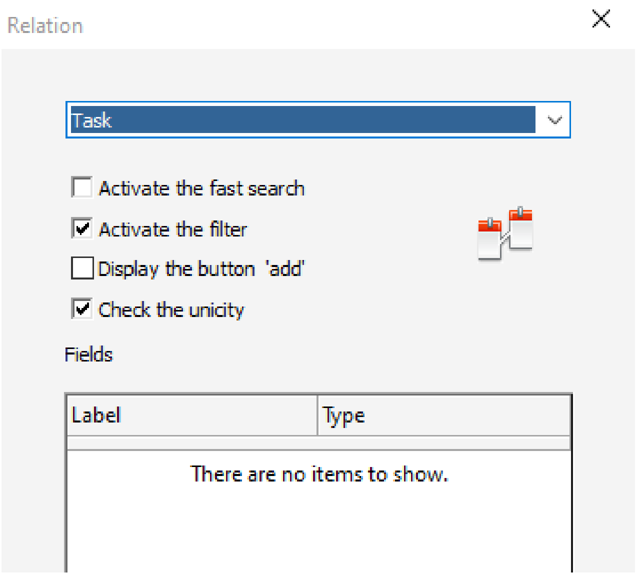
You can also input equipment in the Data-Menu > Dimensions > Equipment:



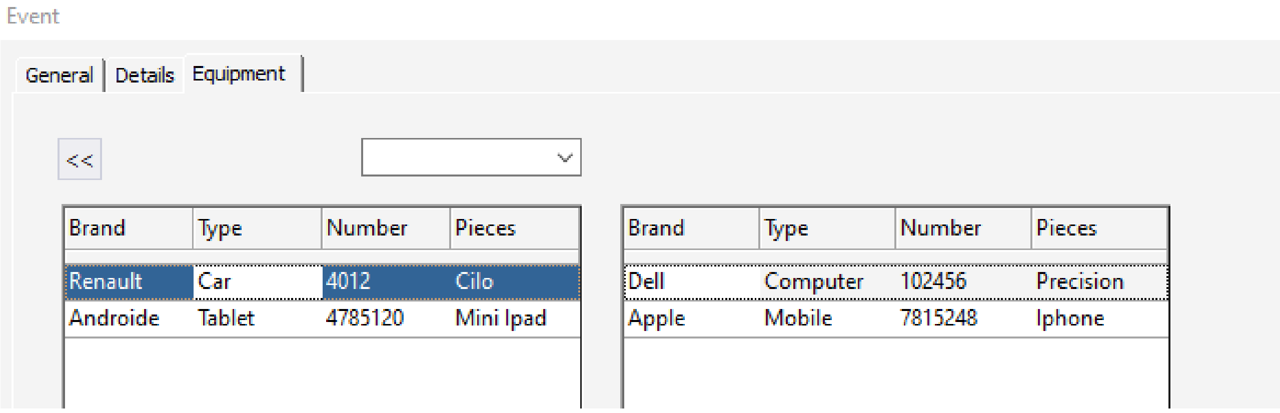

| Brand | Type | Number | Pieces |
|---|---|---|---|
| Apple | Mobile | 7815248 | Iphone |
| Dell | Computer | 102456 | Precision |
| Renault | Car | 4012 | Cilo |
| Androide | Tablet | 4785120 | Mini Ipad |




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.



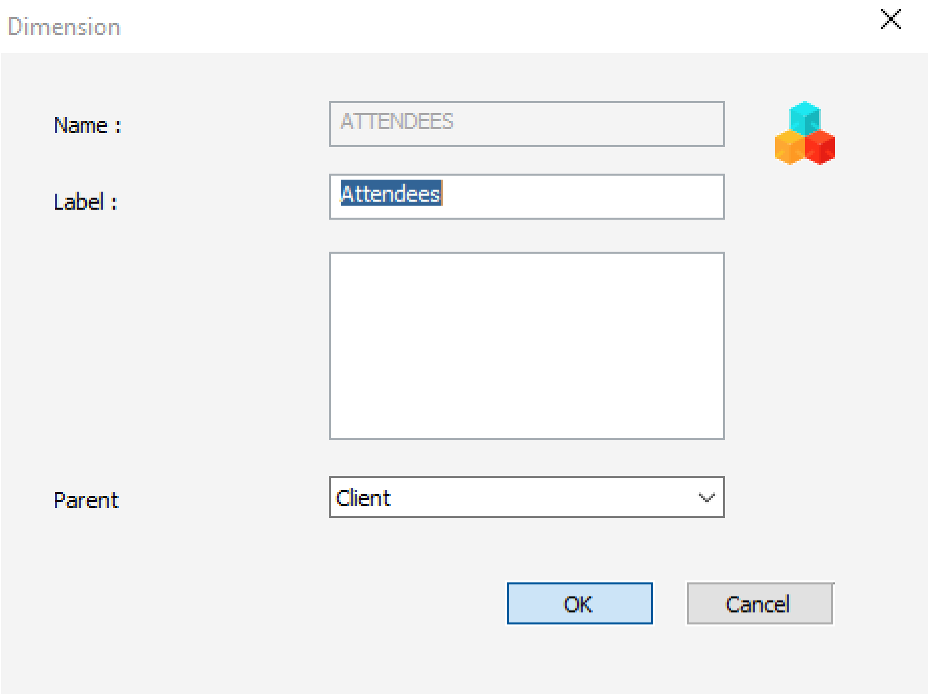
You can now allocate equipment in the resource window:



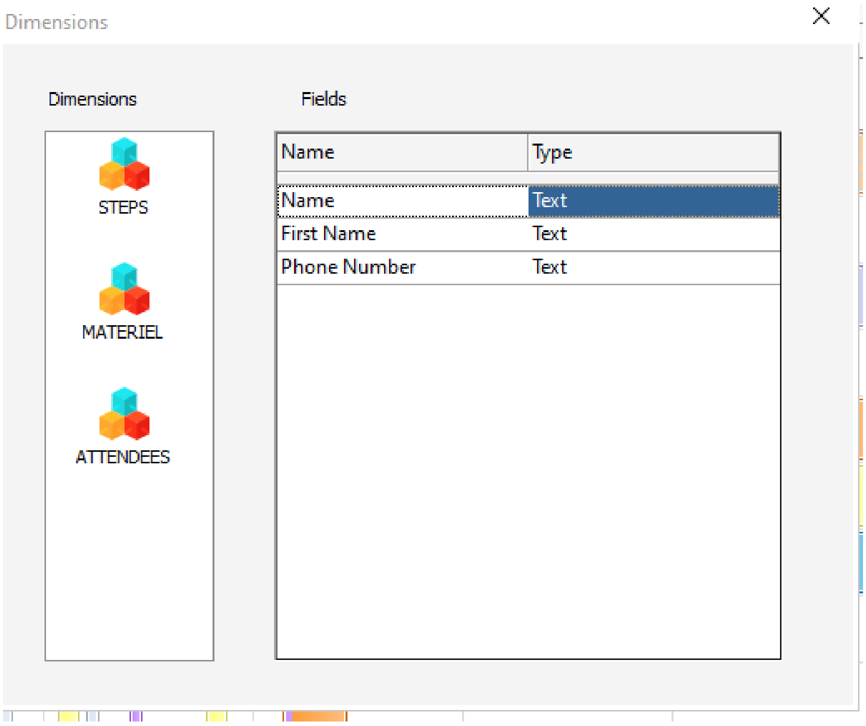
## Practical case: training management

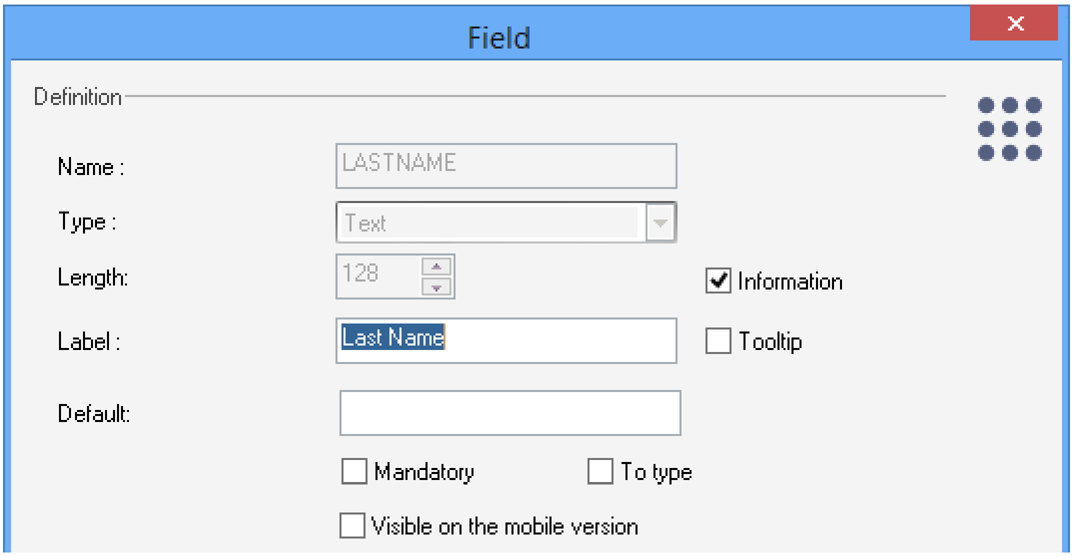
Would you like to plan trainings for your customers and integrate attendees?

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.

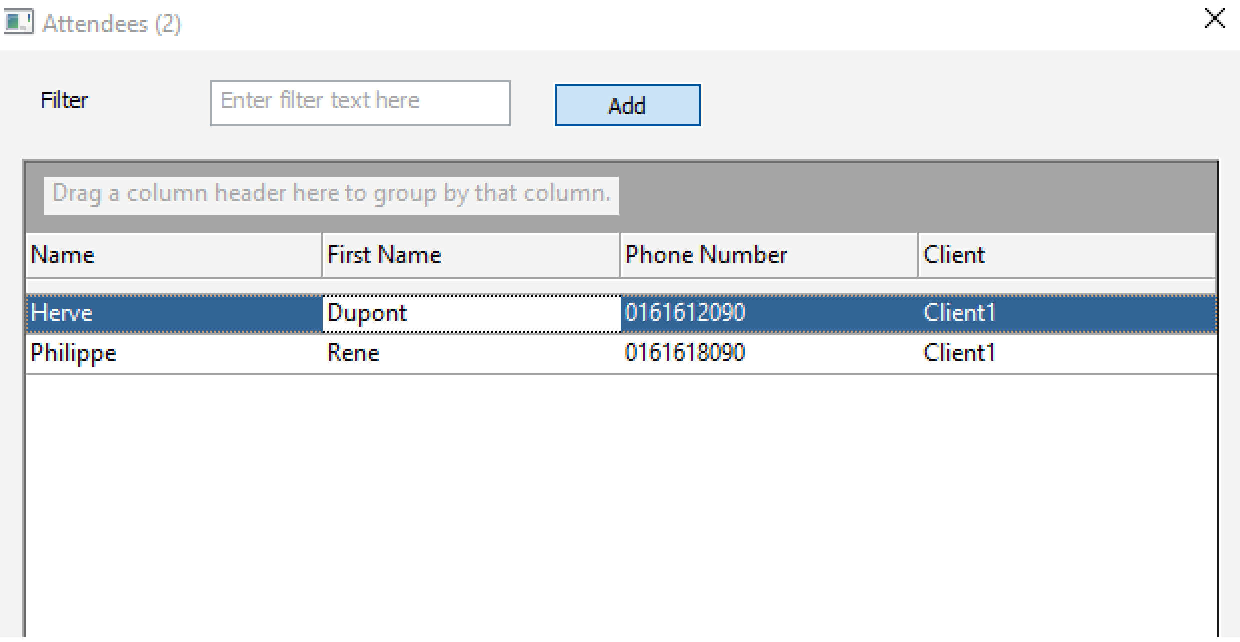


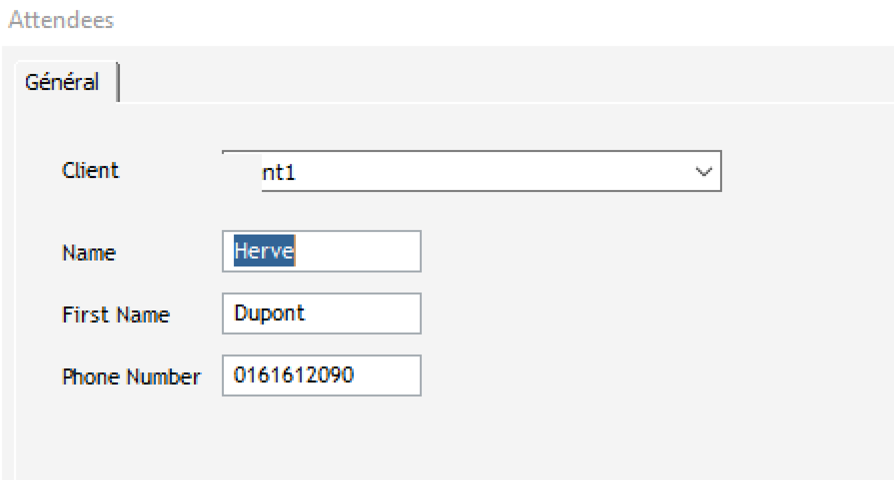

You can now add first name and name to the **ATTENDEE** dimension.



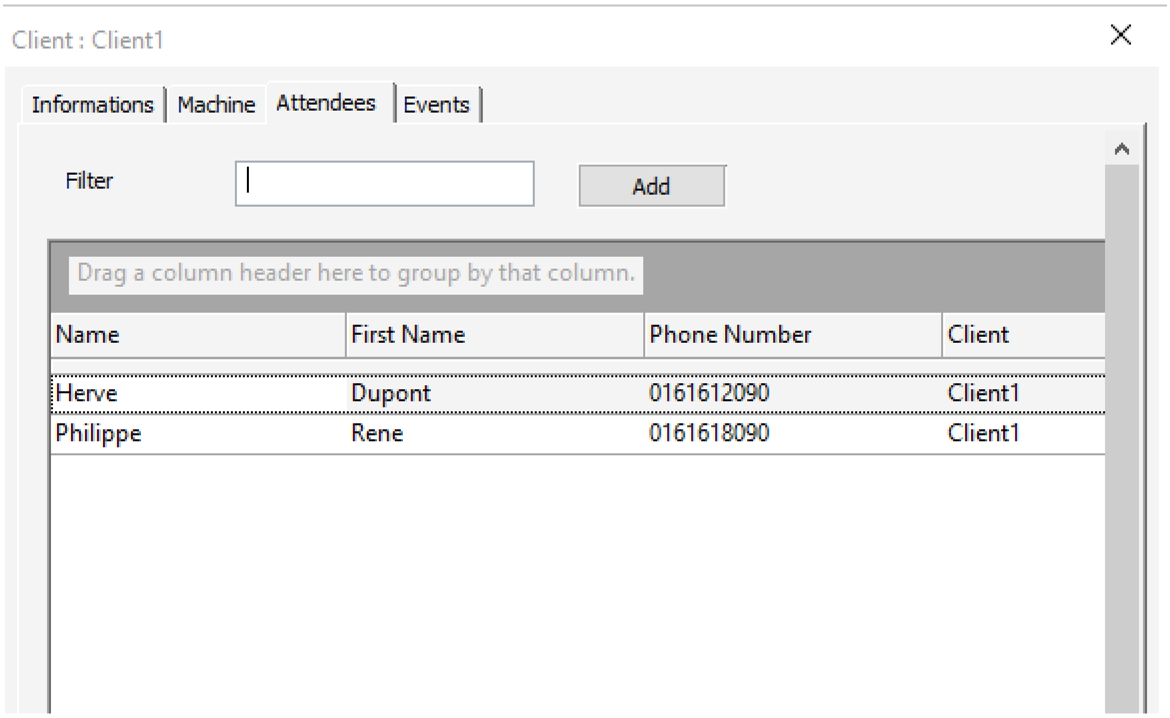




You can also input attendees for each customer in Data-Menu > Dimensions > Attendee.

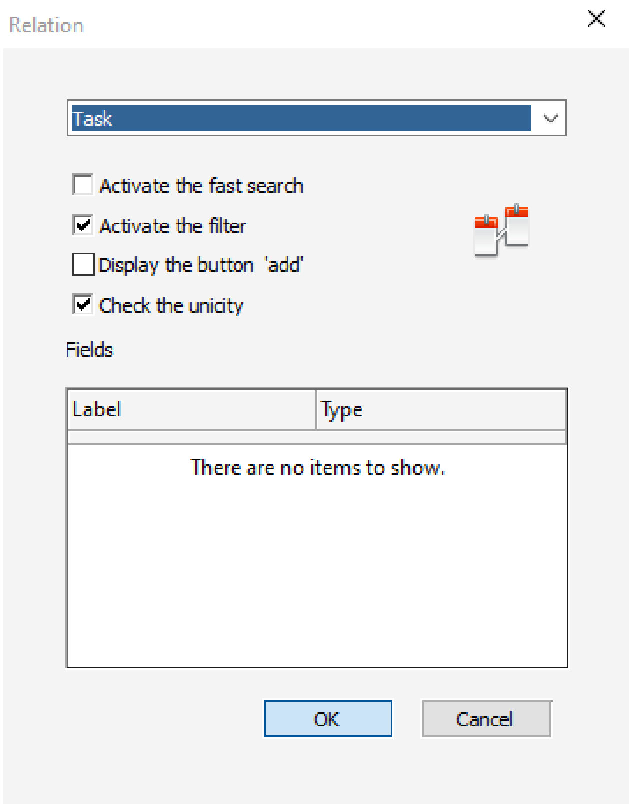


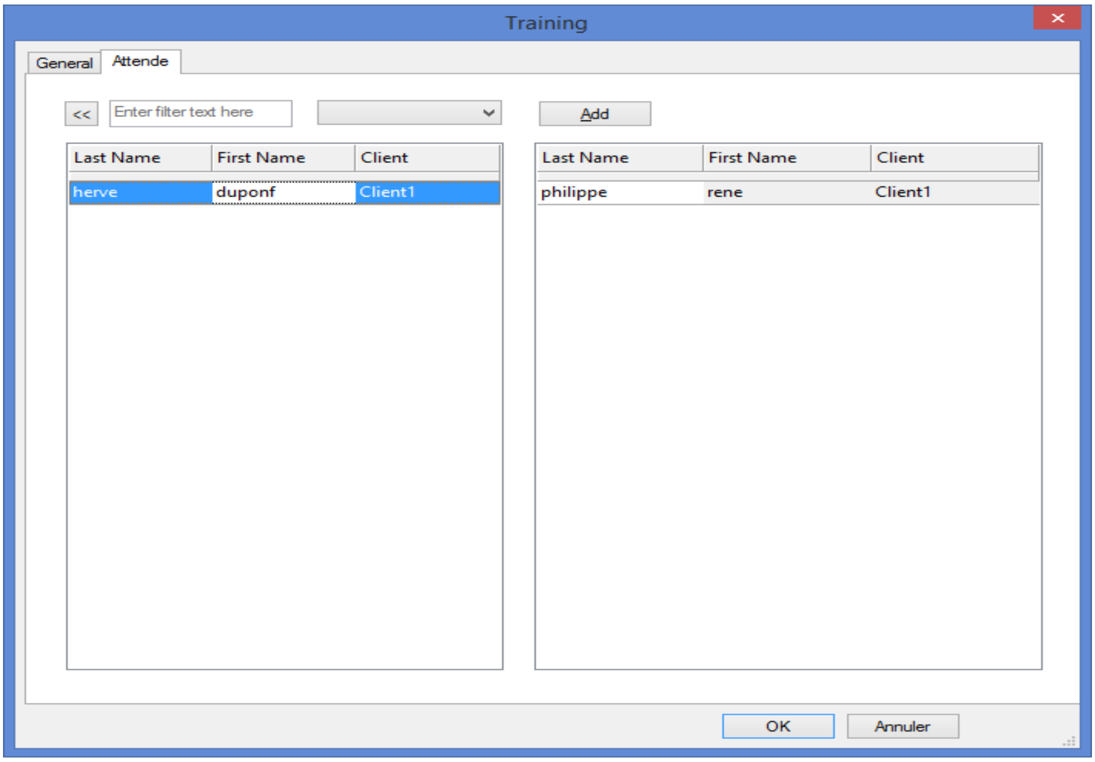

You can also find the attendees in the customer window.




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.



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

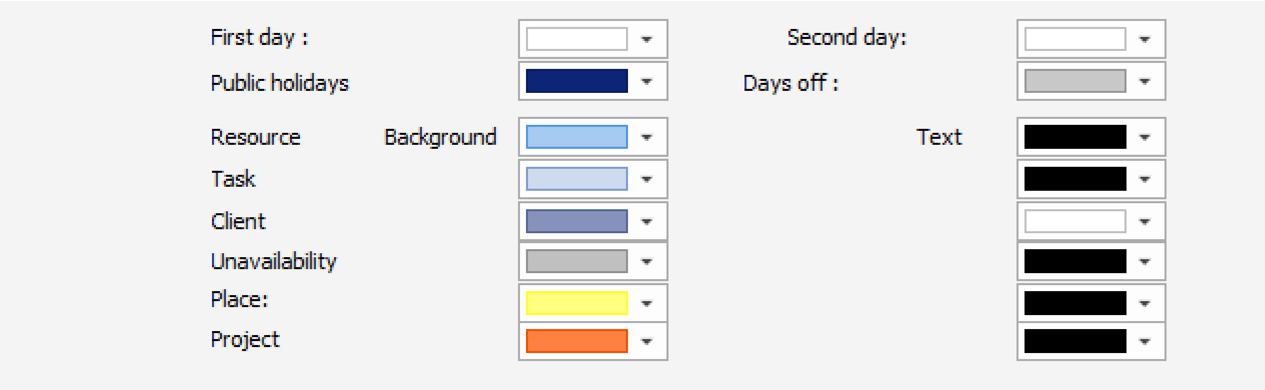

On the schedule, each event is represented by a colored rectangle.
This color can be displayed depending on different types of fields:

- *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.

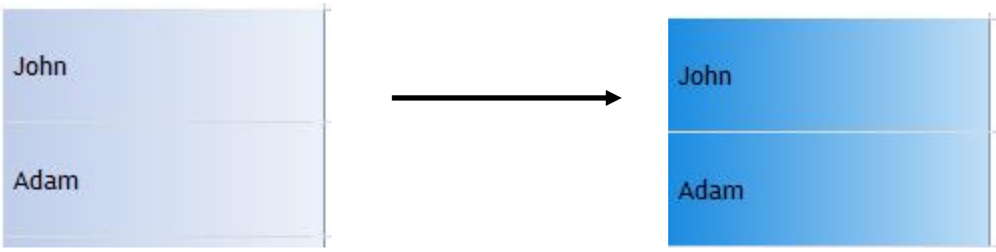
### Select the colour by default

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

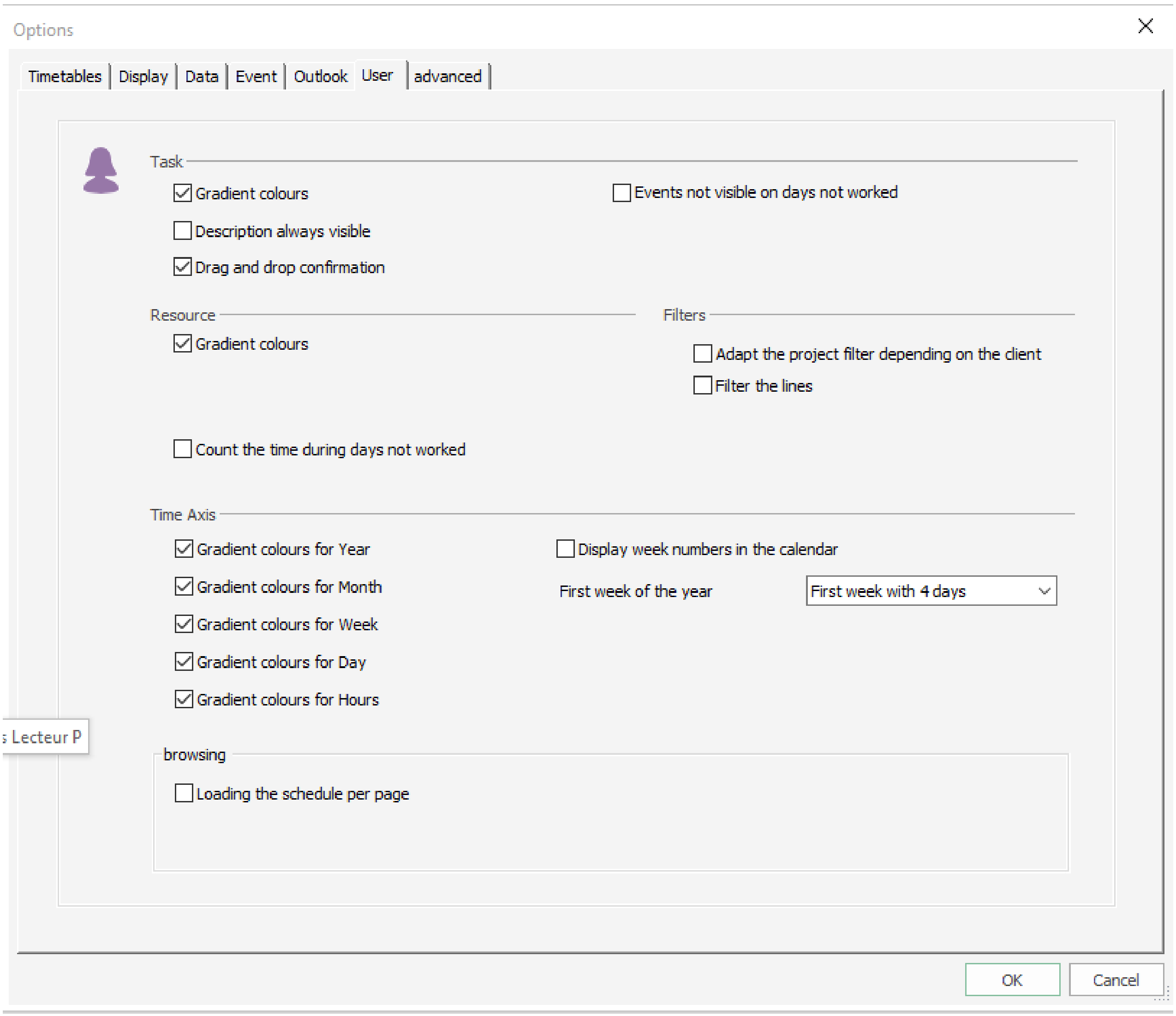



## Play with the events gradient colours

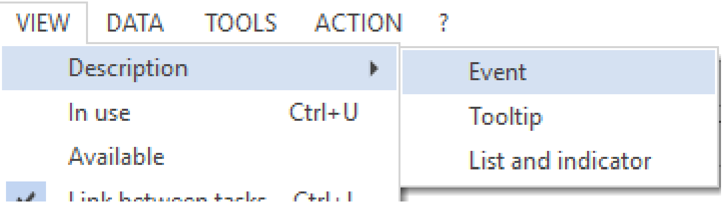
Gradient colours:




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
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
First week of the year
First week with 4 days
Gradient colours for Week
Gradient colours for Day
Gradient colours for Hours
browsing
Loading the schedule per page
OK
Cancel

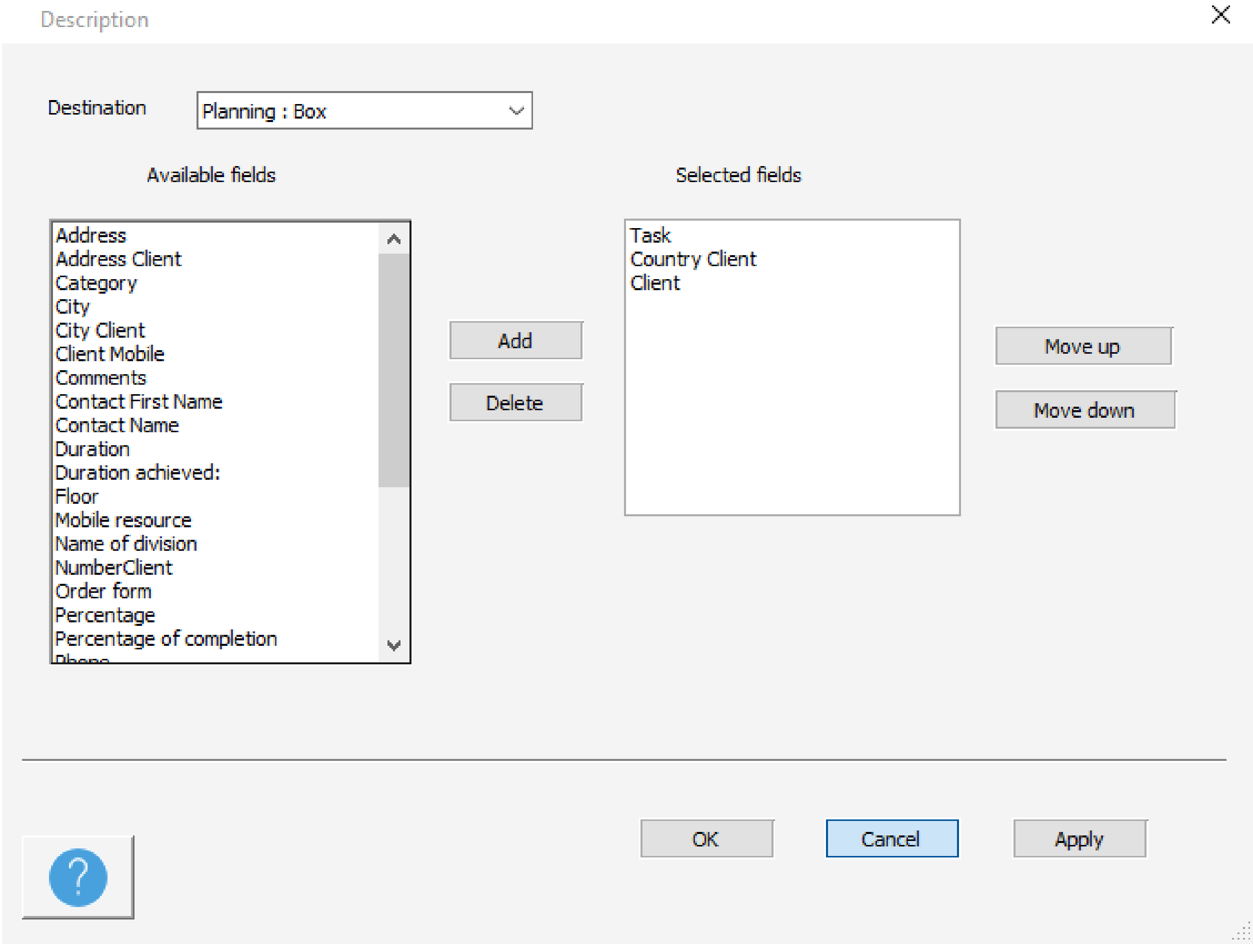
# Select fields displayed for the box, the tooltip and the list view




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

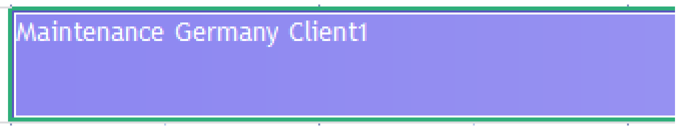
The window below appears.




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

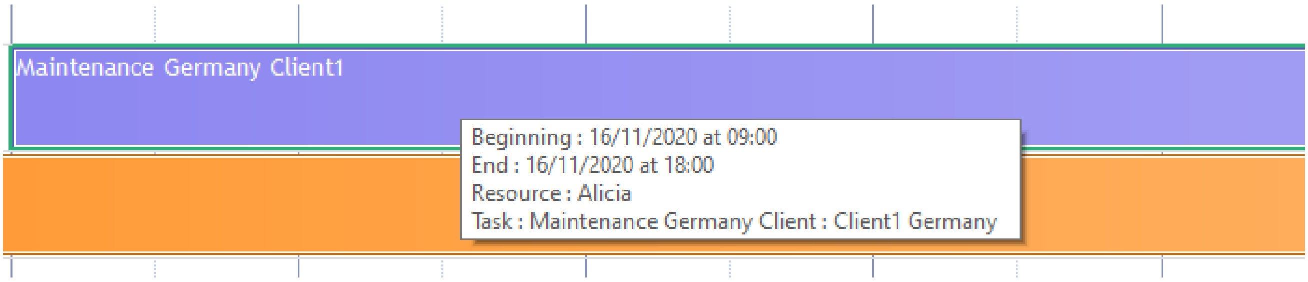
Fields displayed on the box that represent an event:




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…

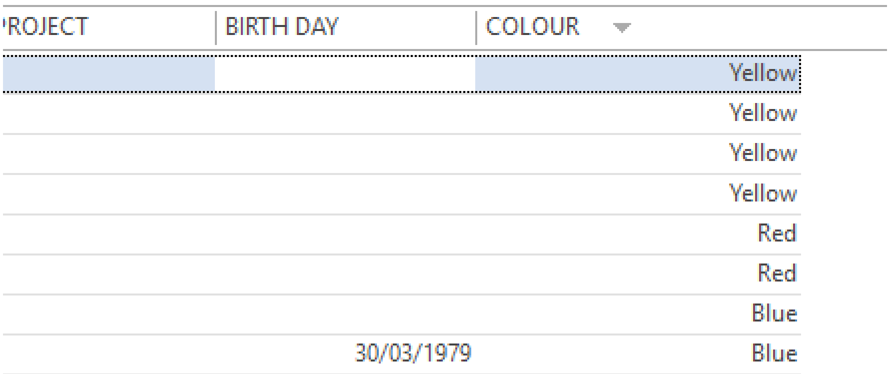
## Tooltip

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




## List and indicators

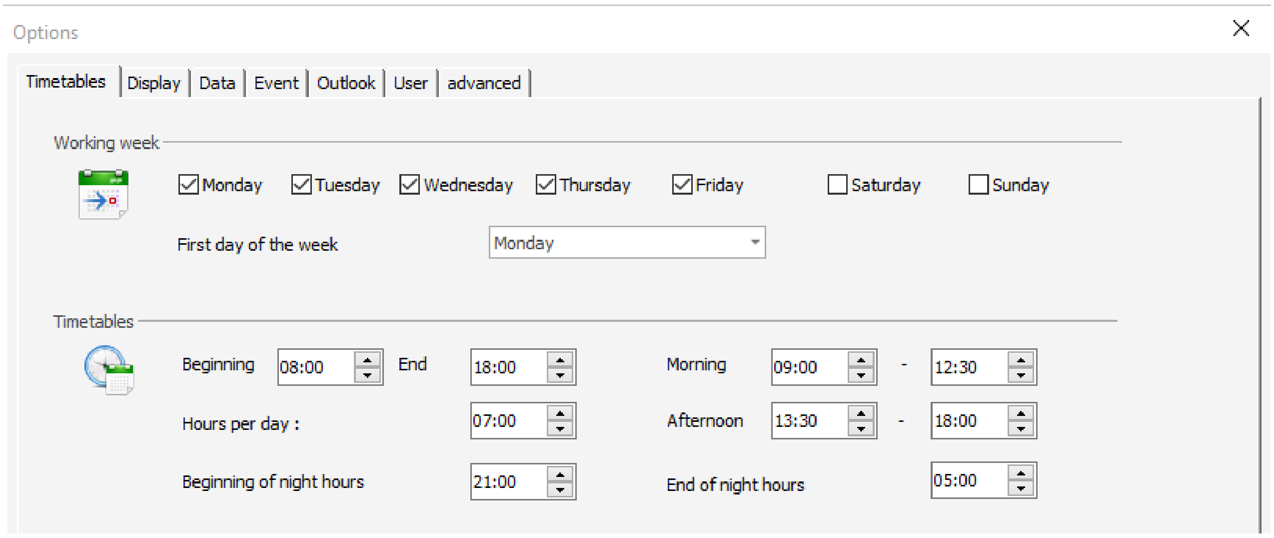
You can add your additional fields on those views.



| 'ROJECT | 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.

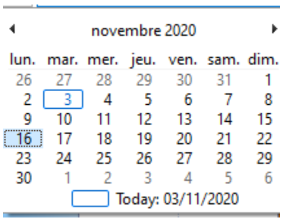



## Working week

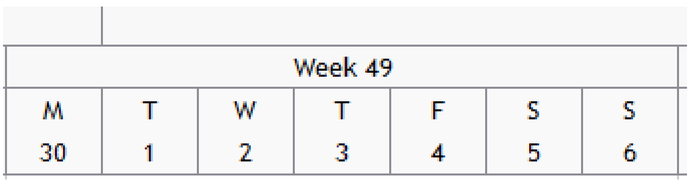
Select the days you usually work on from the wizard. Then, the default profile of your resources will take into account those settings.
For example, if you do not work on Saturday and Sunday, the default profile for each resource will be the same.

## First day of the week

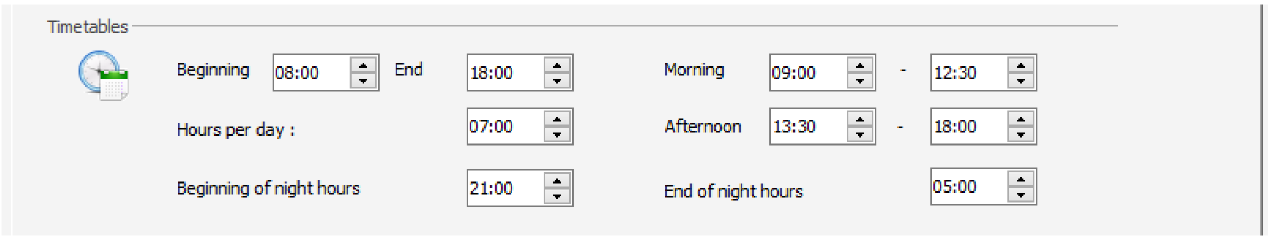
Select the first day of week. Then, on the calendar, the first column will be the first day selected:



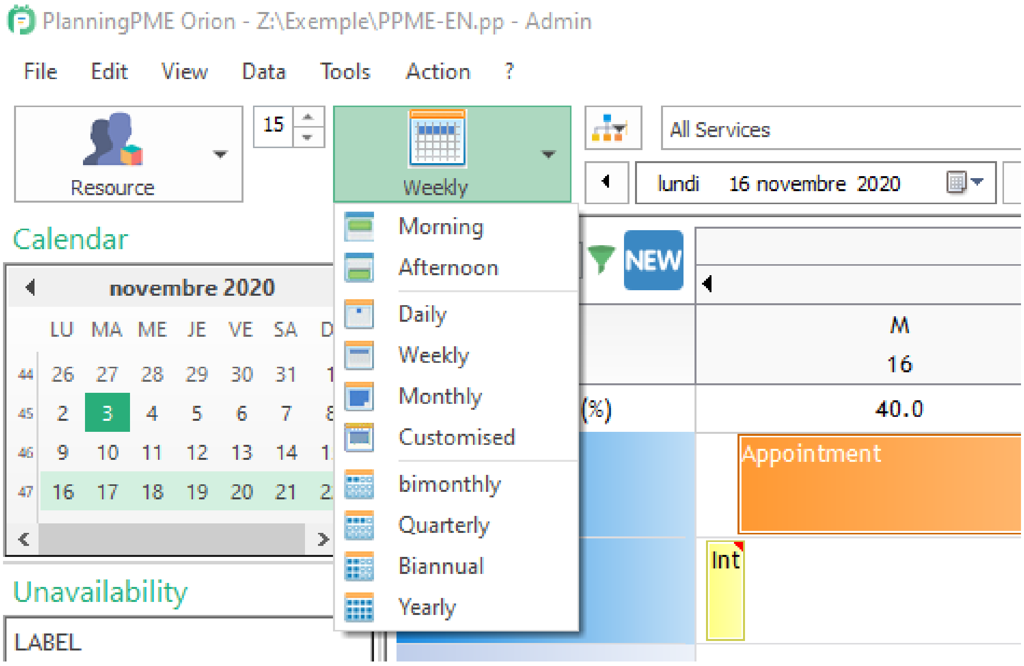

And on the planning board, the week will be delimited as shown below:



## Timetables




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




### 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

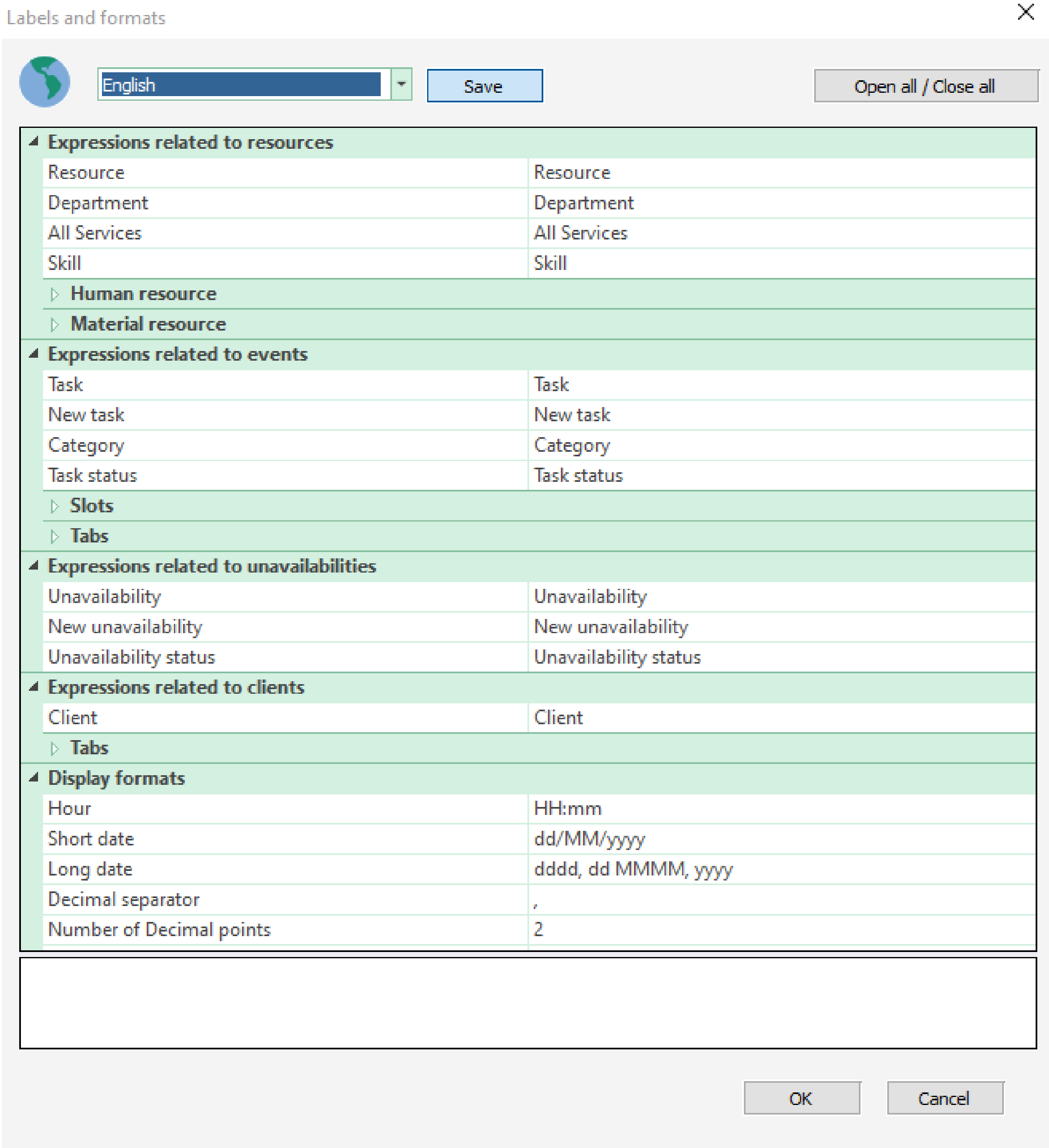
While displaying the afternoon view, the time selected will be displayed.

### 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.




### 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

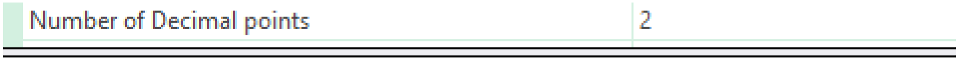
You can rename different fields in order to customise the planning to your activity.

A client can be renamed a customer. A Task can be a mission....
The changes made will be transfered 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

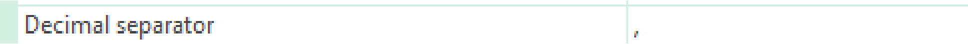
### Number of decimal points

It is possible to choose the number of decimal points.




### Decimal Separator

In function of the countries, the decimal separator can be:
A comma or a point.
From this menu, you can customize it:



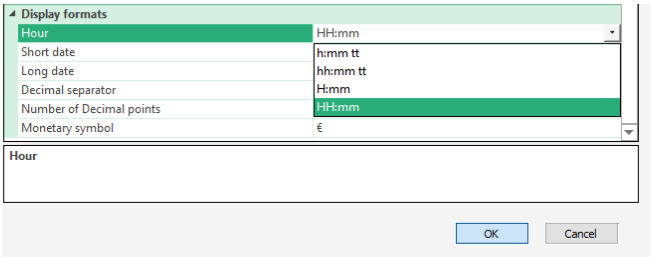

NB: you will need to set up this option correctly in order to use Excel Pivot Table.

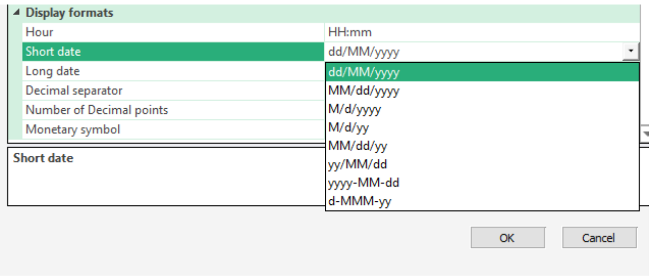
### Monetary symbol

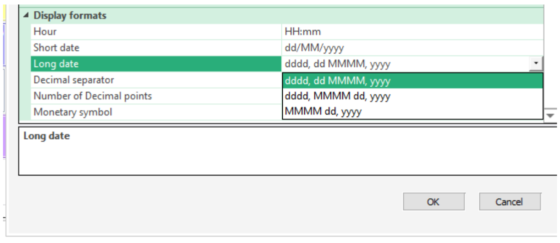
You can choose between all the currencies listed.

### Hours and dates format

You can select the format of hours and dates.



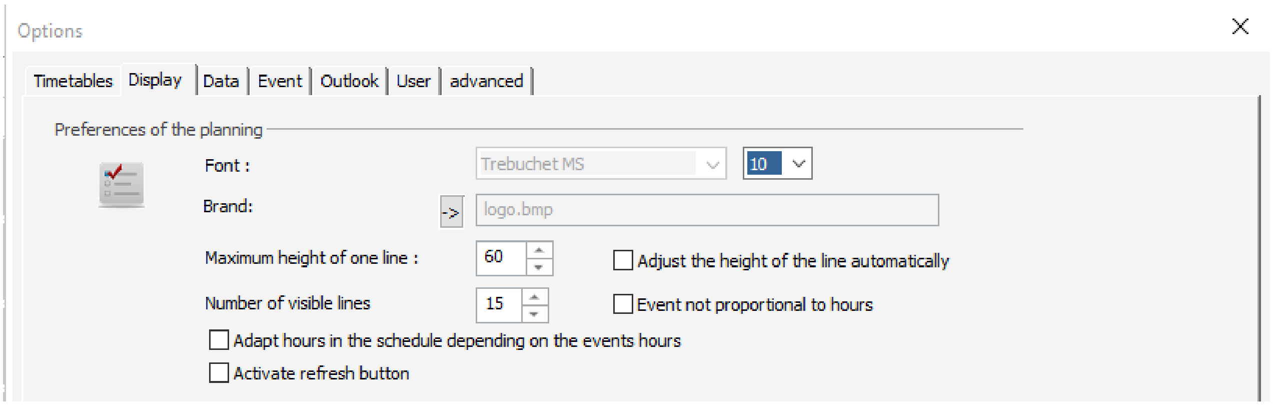



## Other preferences

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.

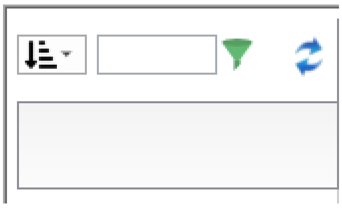
#### Number of visible lines

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

#### Display the event on all the day whatever its duration

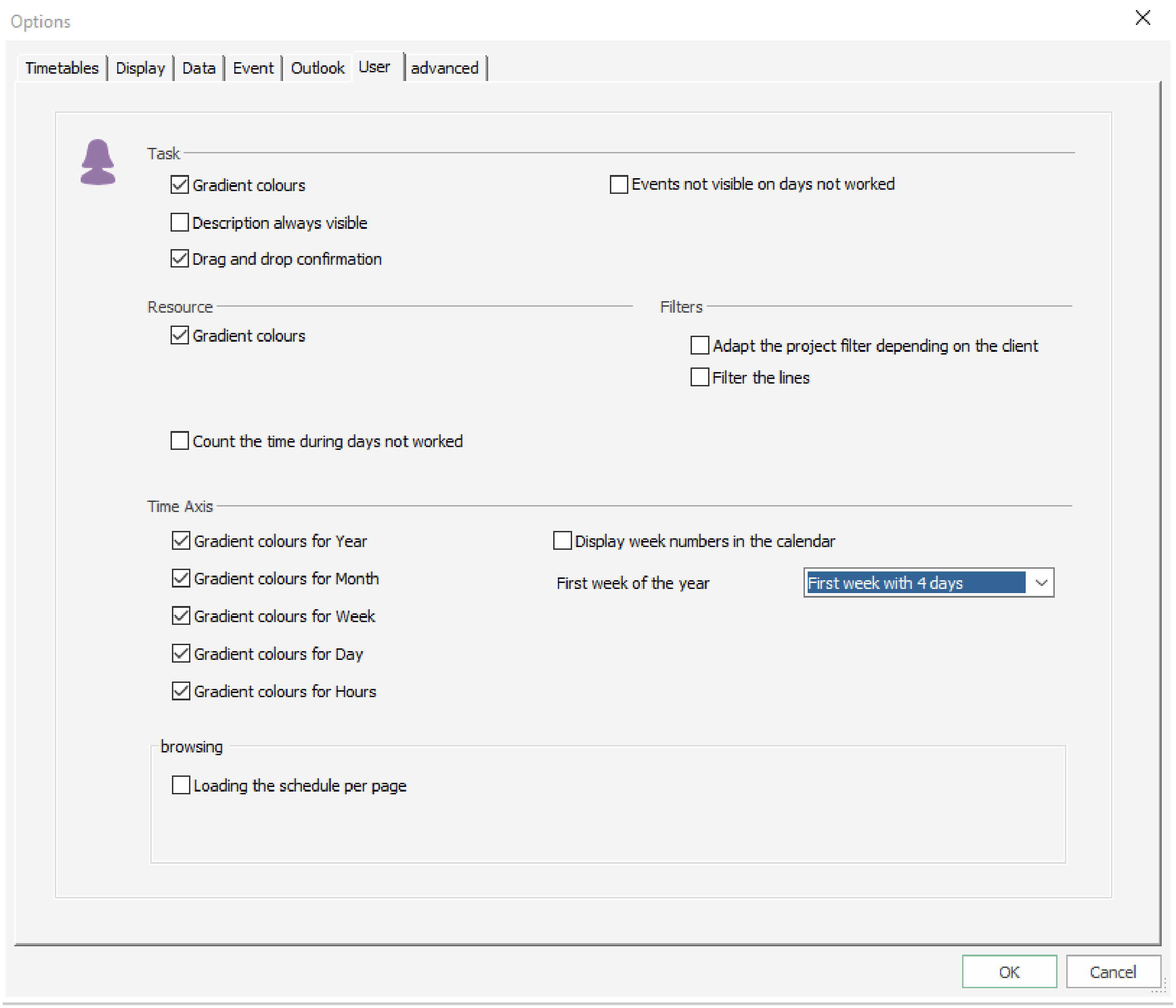
If you want to see more information, you can select the option: Events not proportional to hours.
All the events on your planning board will appear on the whole day whatever the real duration as in the example below.


## Activate refresh button



## Select the first week of the year and display week numbers

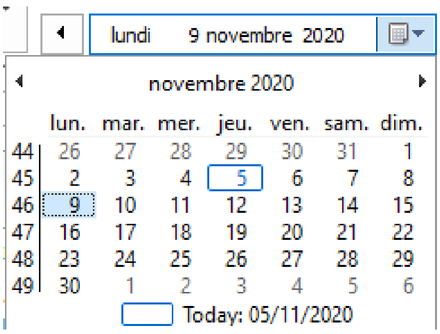
Week Number 1 is either the week including the 1st of January or the week after (First week with 4 days). So, in order to suit all markets and countries, you can now select this first week from the menu Tools -> Options -> User.




### First week of the year:

Week including the 1st of January or not.

### Display the week number

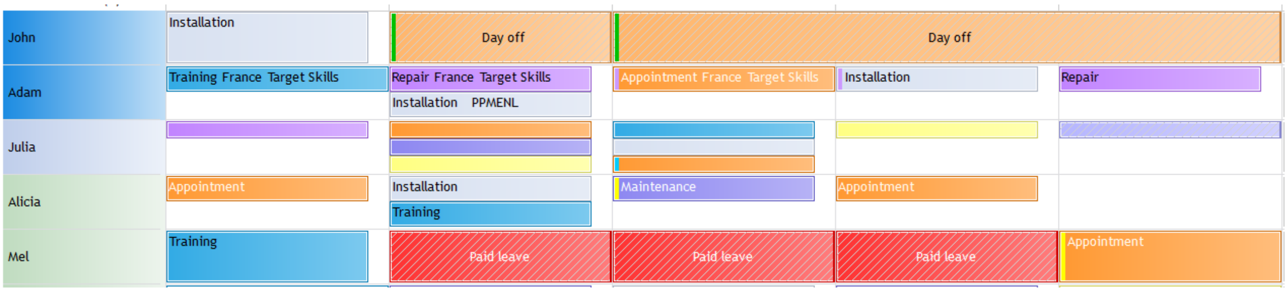



### Why should you hide the week number?

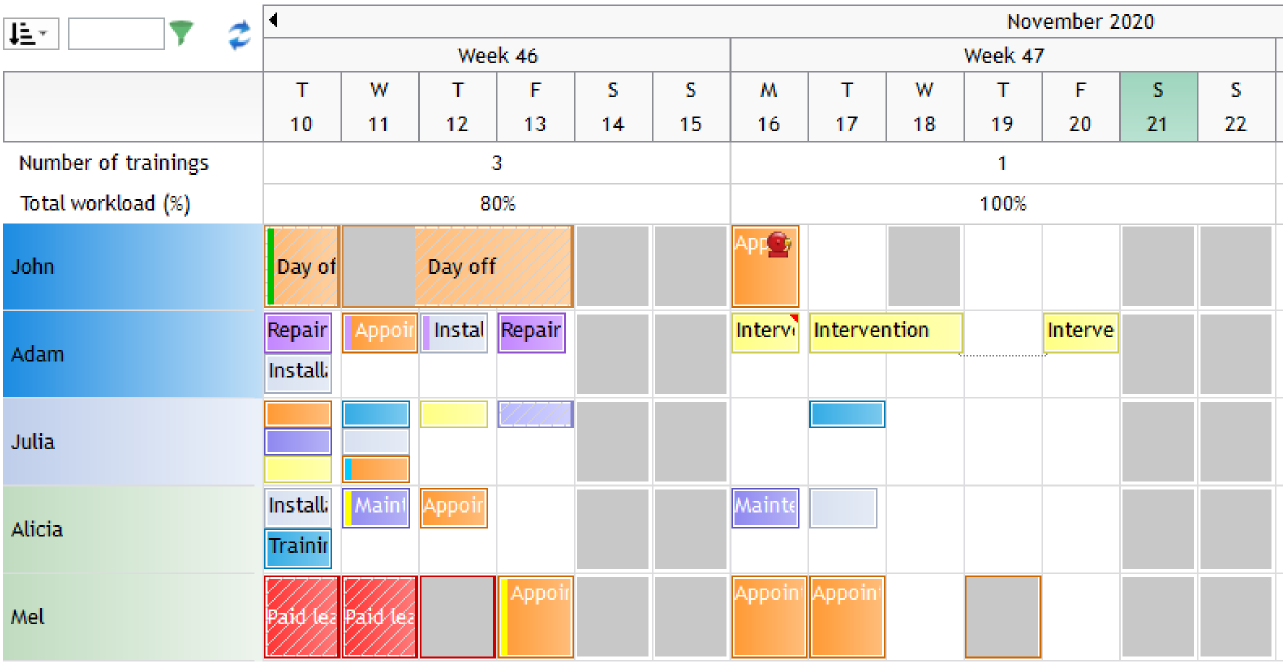
It appears that depending on your Windows version, the week number is not the same as the one you selected as “First week of the year”. This is not something that can be changed by Target Skills as there is no solution yet on the market to solve this problem. That is why you have the option to hide the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




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:




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.

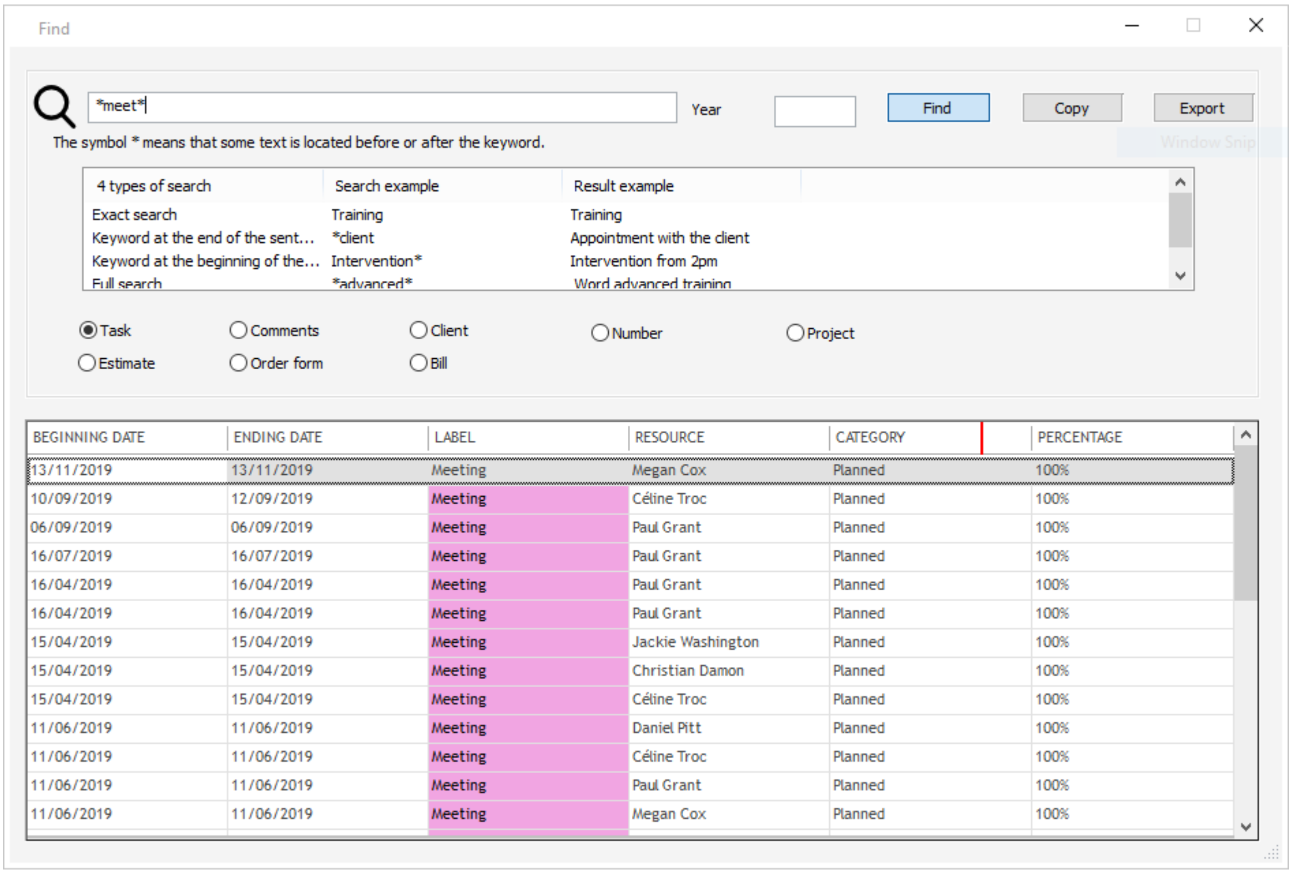
**- Function “Search” (CTRL + F)**
It is a search of events by keywords.

**- 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 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

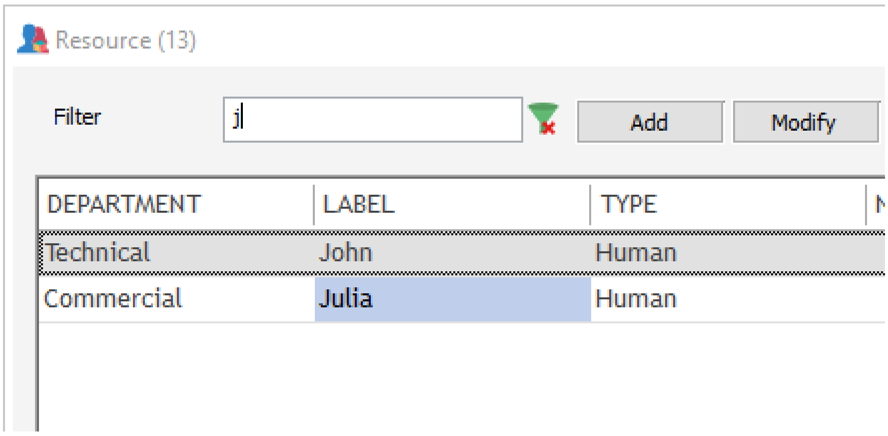
You can open or delete an event selecting one of the results and then, right click, “Open” or "Delete".

### Search on additional fields

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

## Search for resources, clients and projects

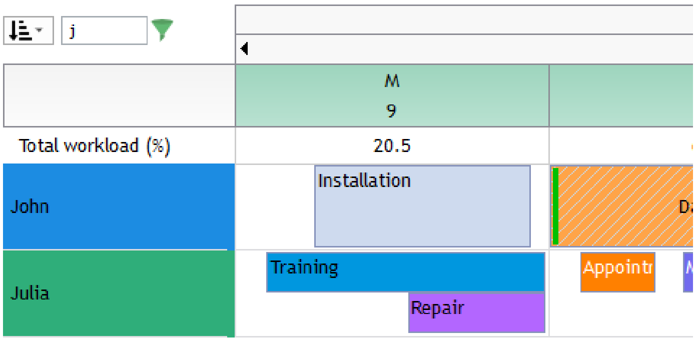
### From the menu Data




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.

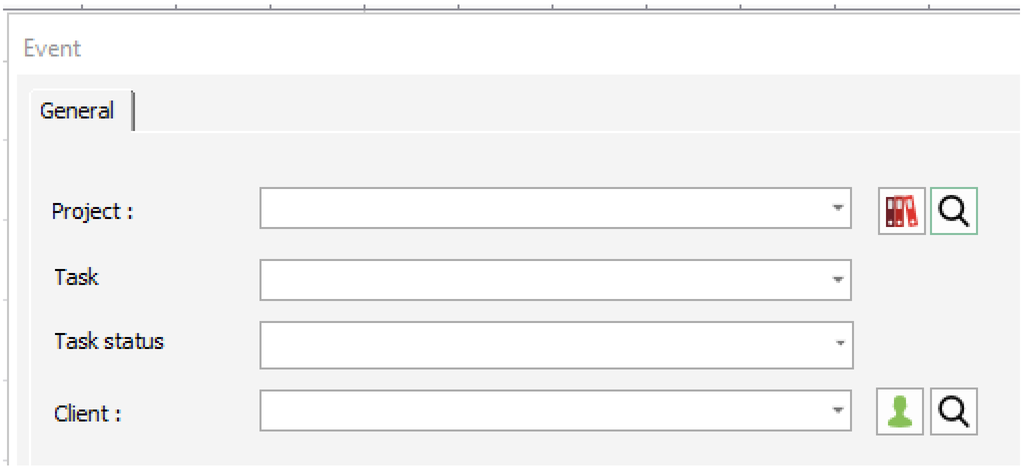
### From the planning board directly

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

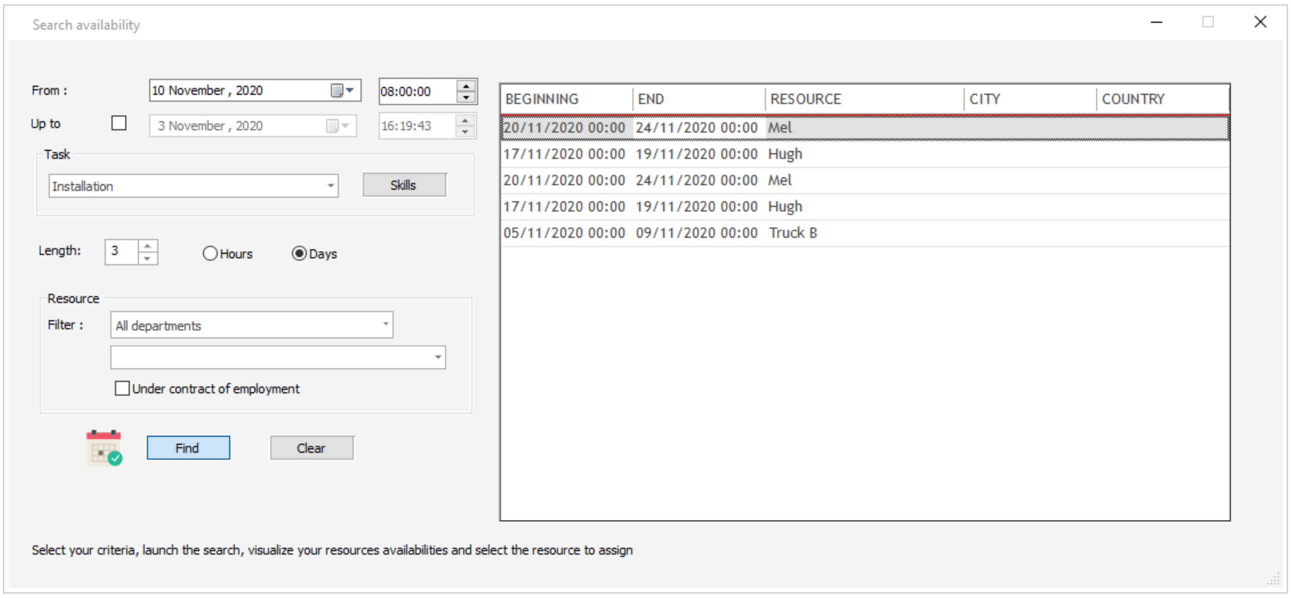



When creating a new event, you can search by the project name or the client name pressing the “glass” icon.

## 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.




## 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.

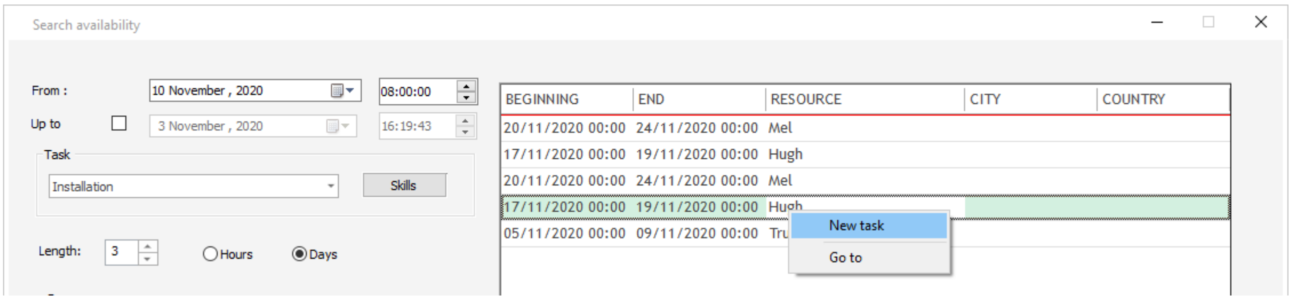
You can also filter by resource under contract only.

### -> 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”.




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.

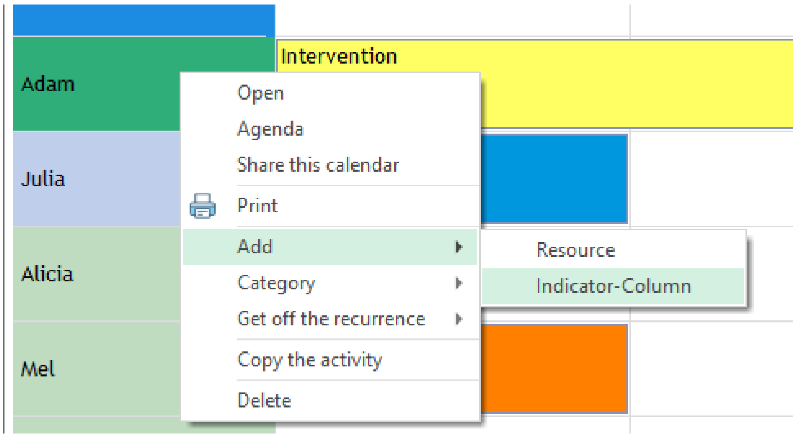
# Indicators: Planning data displayed on real time

## What is an indicator?

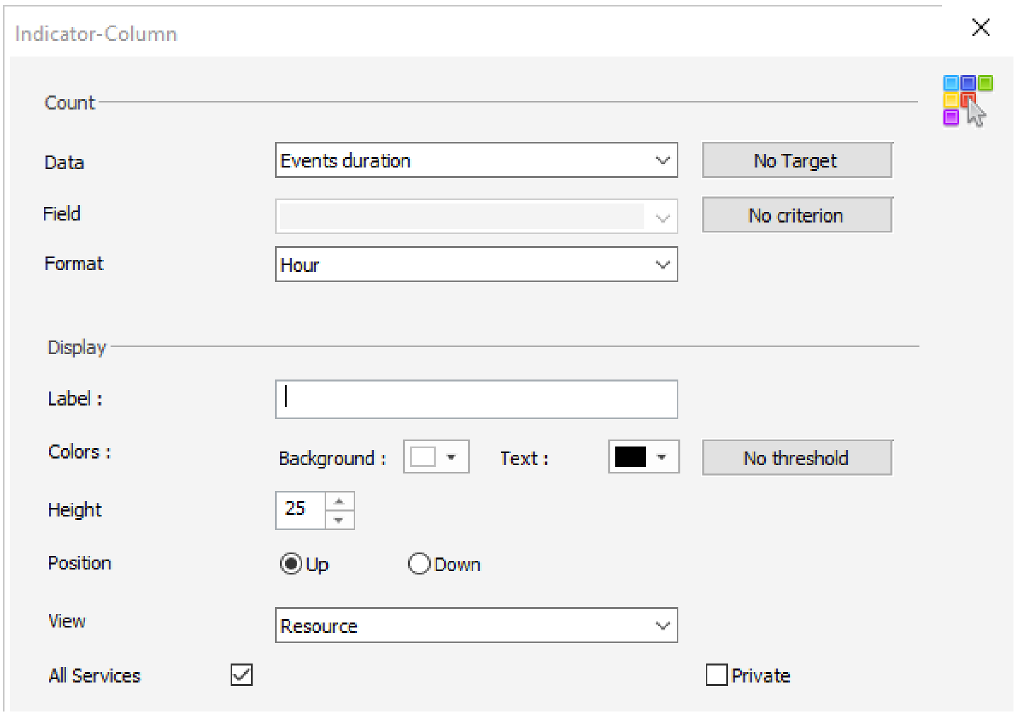
The indicators show real-time **calculated data** based on the information contained within the schedule. They are displayed as lines, columns over a daily, weekly or monthly view.
This way you can see for instance, the number of a certain type of events, the total duration of another one over a week 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



## 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.
<u>Example:</u> 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

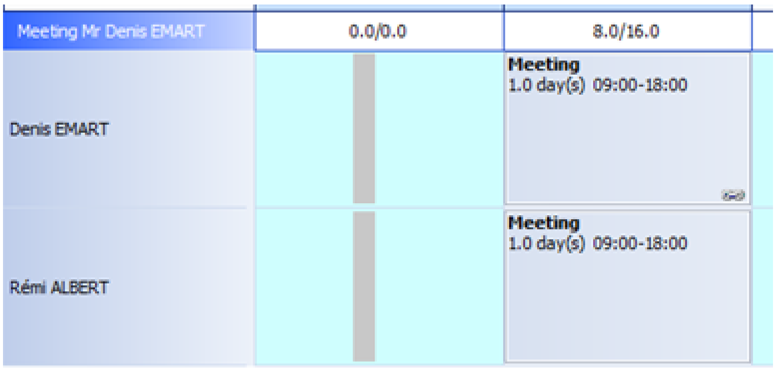
It is possible to add conditions related to the information you want to be displayed. You might want to have the amount of time spent in a certain type of task displayed in the indicator, but you can refine it so that it is limited to one or several resources, clients, departments, categories etc…
<u>Example: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




**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.

<u>Example:</u>

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.

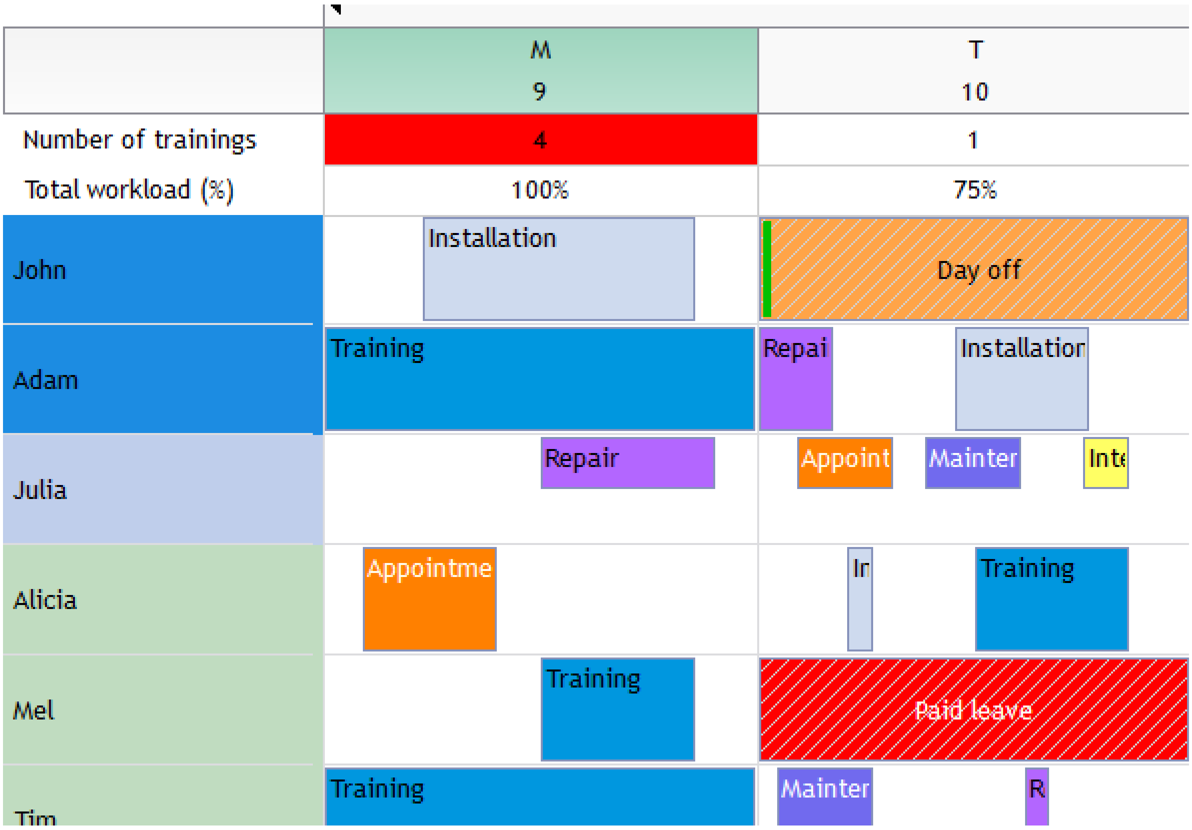
## Using the indicators

### 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.




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.

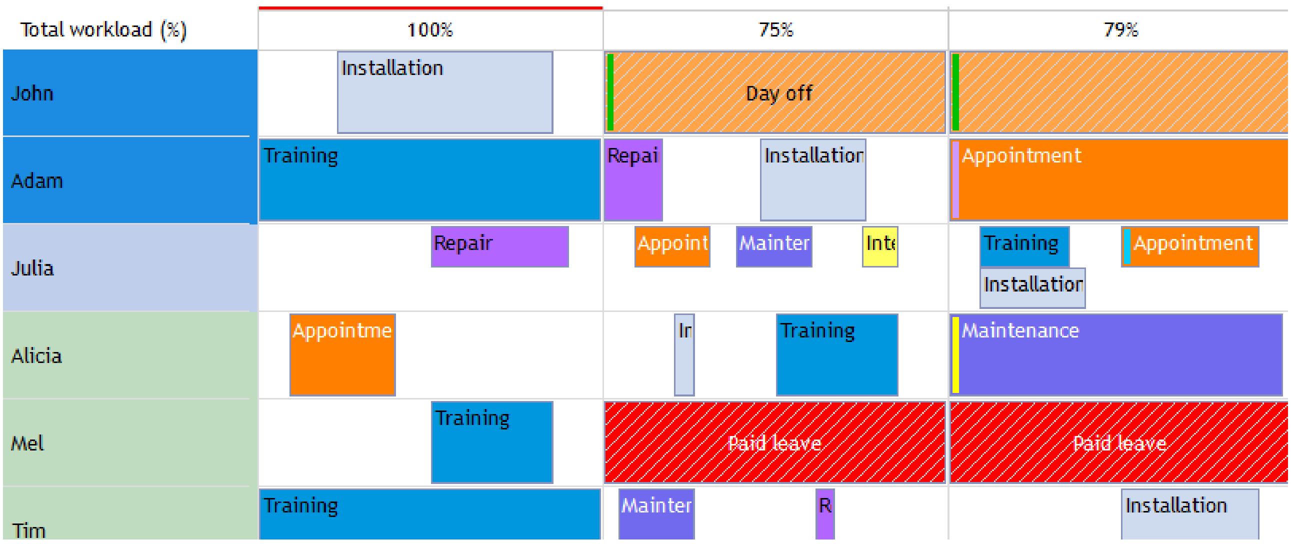
1) Select 'Not worked time', add as criterion :
   - Department . Label . = . 'Accounts'

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.

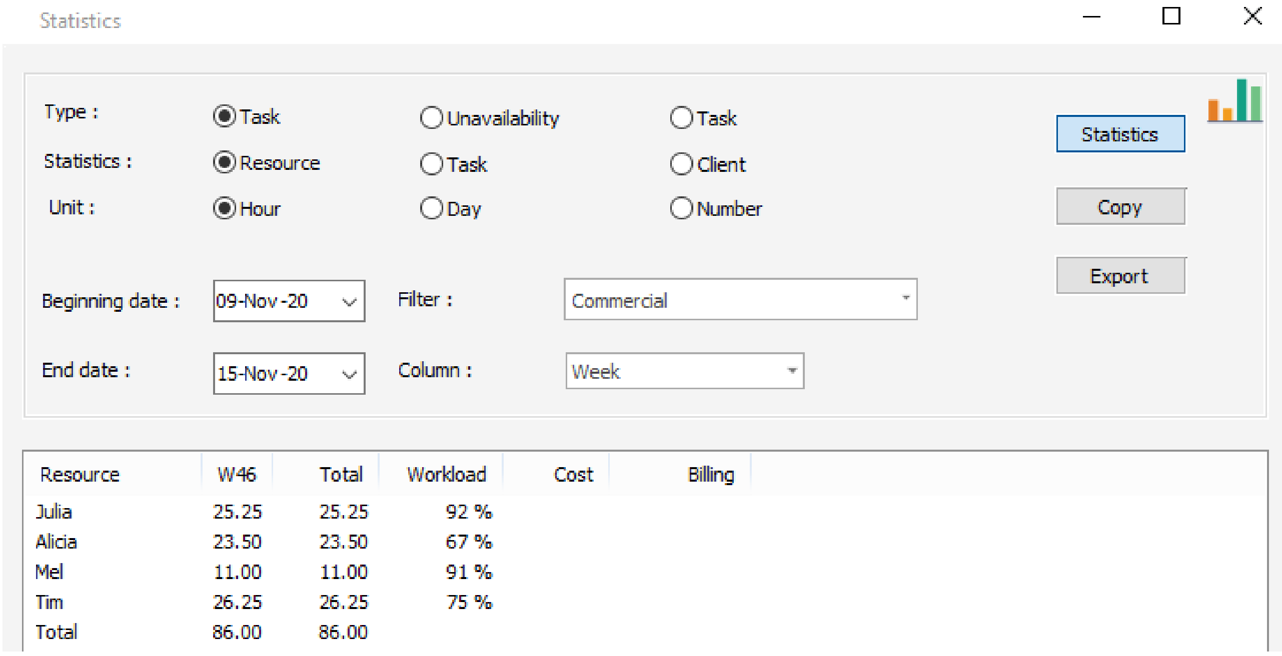
3) Select 'Theoretic Capacity', validate

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”:




## 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.

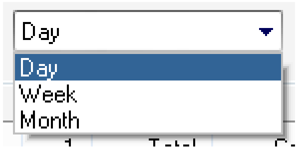
### Dates

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.

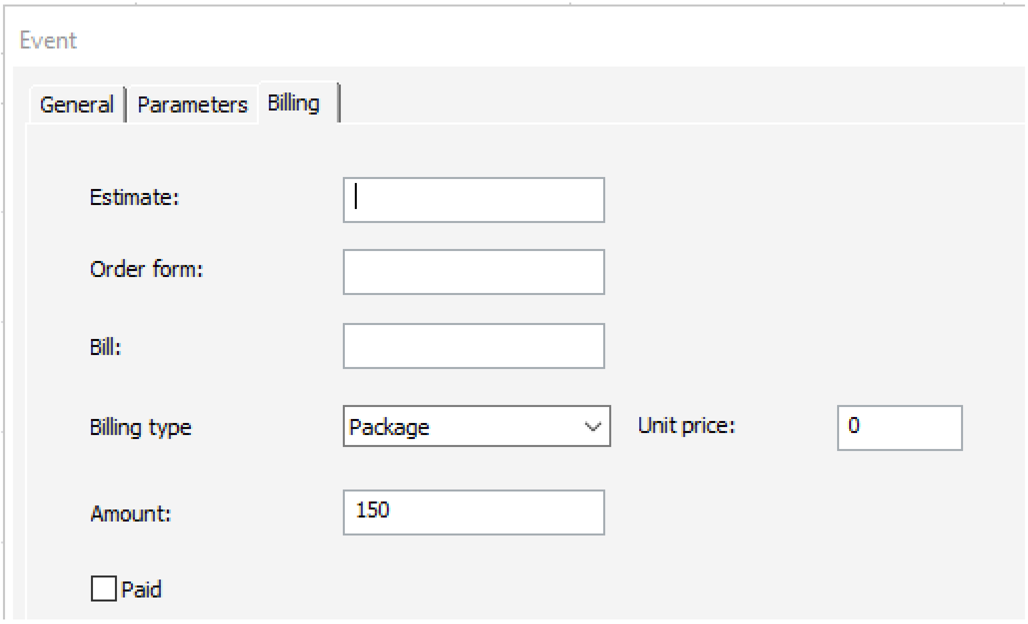
| Resource | W46 | Total | Workload |
|---|---|---|---|
| Julia | 25.25 | 25.25 | 92 % |
| Alicia | 23.50 | 23.50 | 67 % |
| Mel | 11.00 | 11.00 | 91 % |
| Tim | 26.25 | 26.25 | 75 % |
| Total | 86.00 | 86.00 | |

## 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

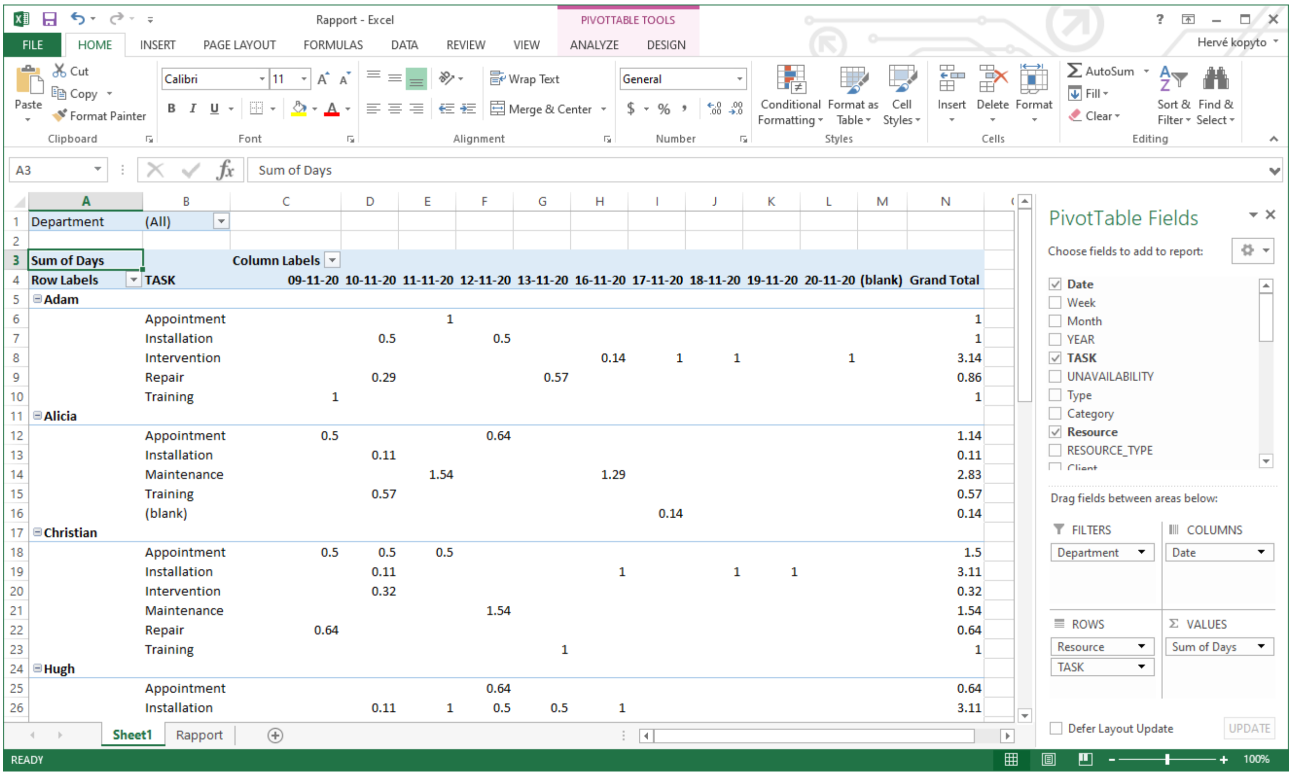
You can have the total cost of your events billing. The amount is calculated in function of the amount on the tab “Billing” of the event window, if activated.




## 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.

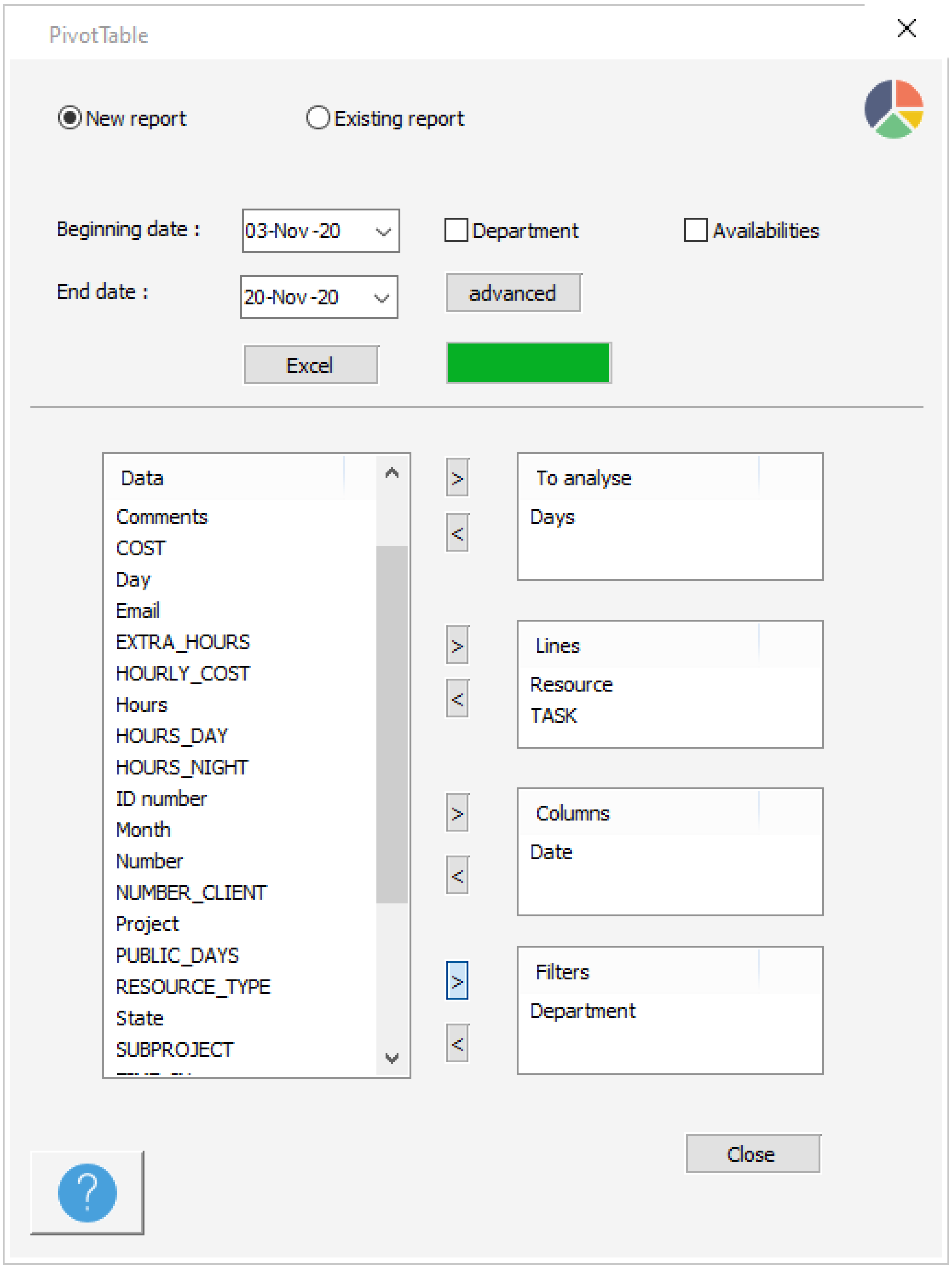
**You can make many reports on the data of your schedule.**



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:




## 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.

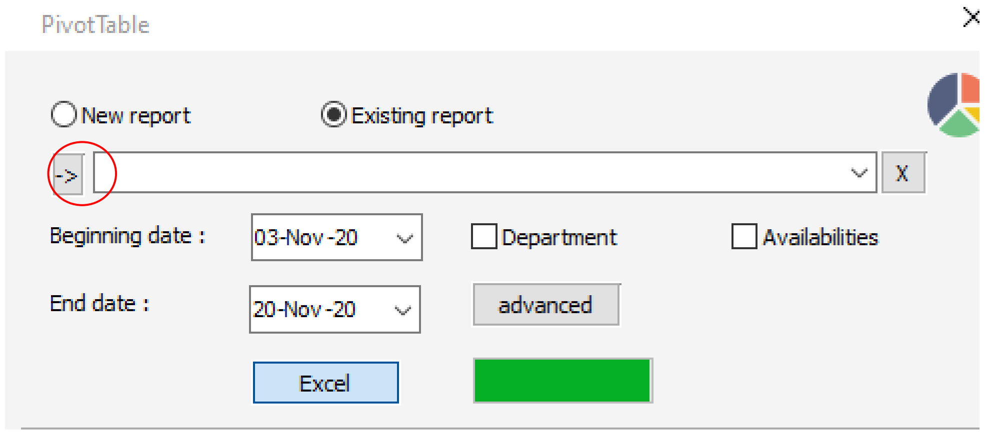
### Button Excel
Press this button to generate your report

## 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.

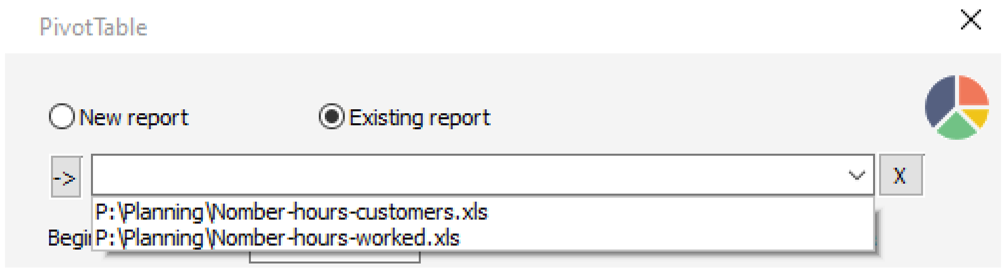
### Save your templates
Just save them clicking on the arrow here:




## 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.



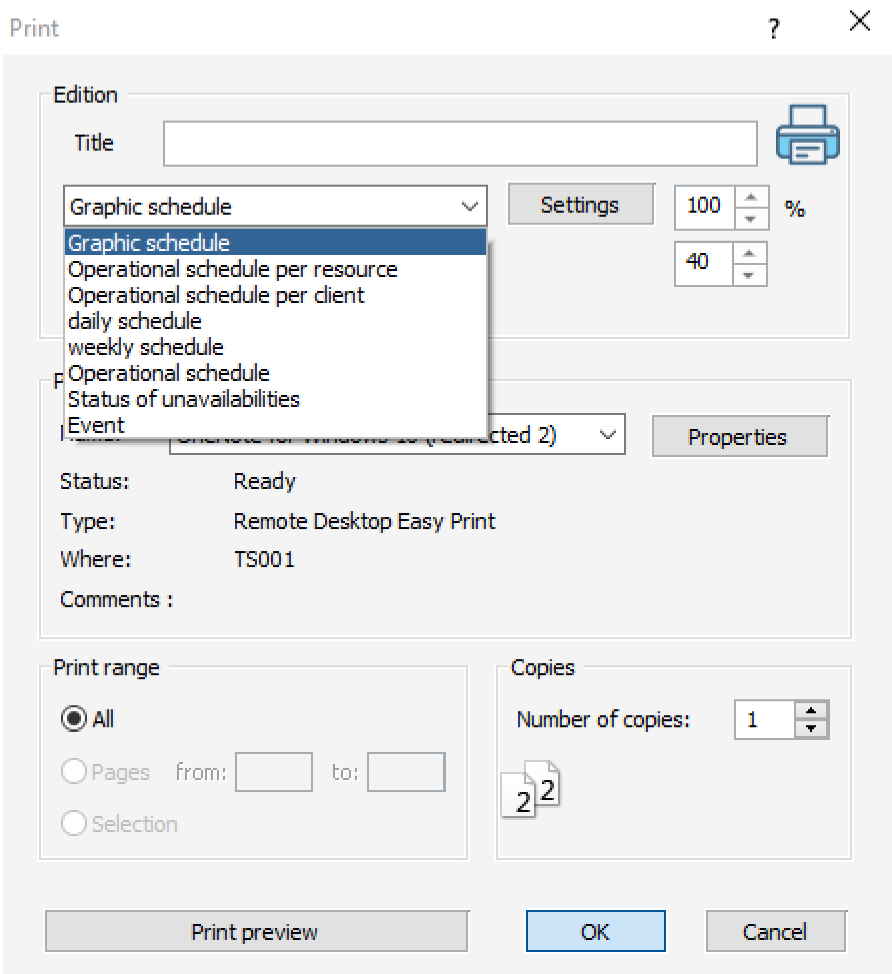

Then, select the Beginning and End dates for your reports and press “Excel”.

## 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:



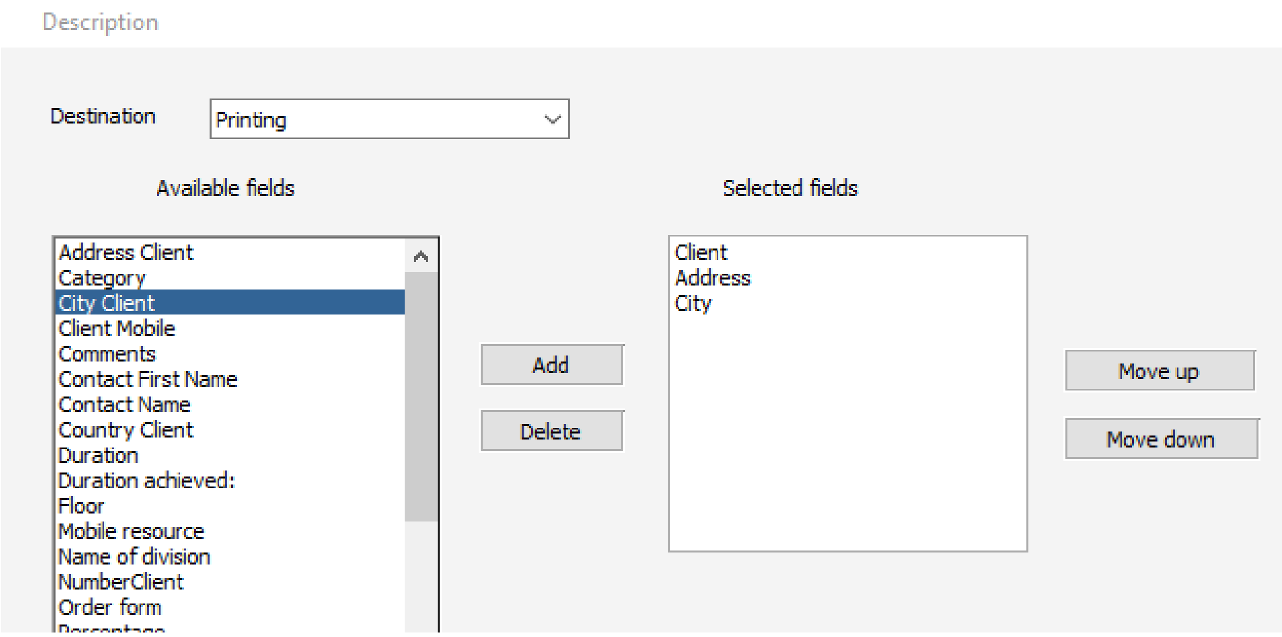

- Graphic schedule
- Operational schedule per resource
- Operational schedule per client
- Daily schedule
- Weekly schedule
- Operational schedule
- Status of unavailabilities
- Print an event

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

### Settings before printing

#### Fields to print

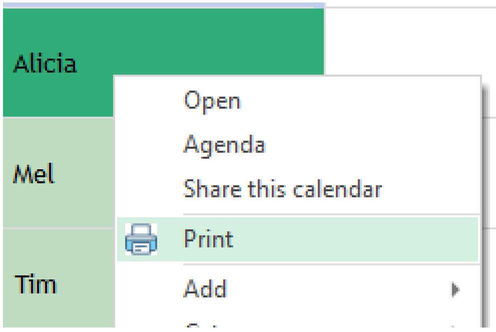
To select the fields you would like to print, click on “Settings.”
Then, you select the data to print from here:




### 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.



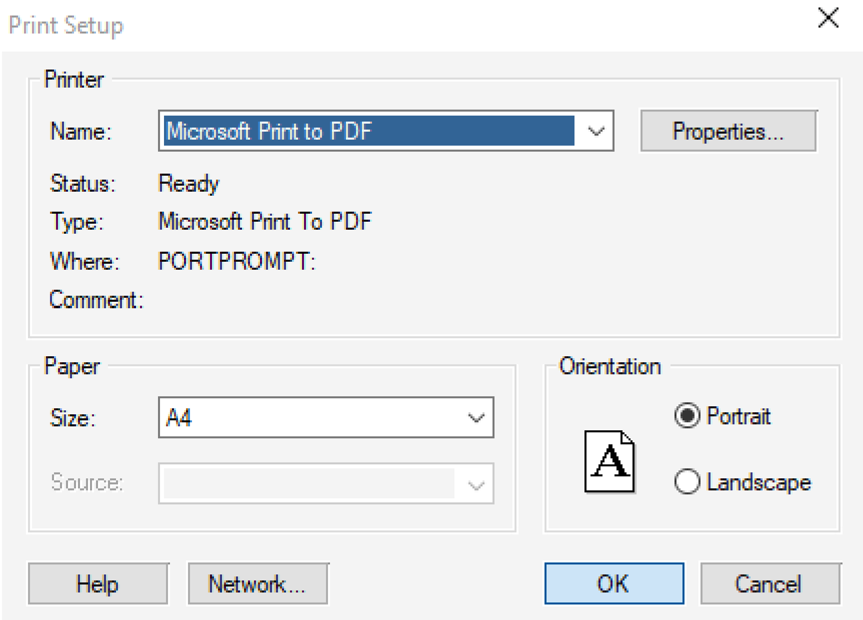

### Filters
You can first filter the planning by client or project for example. Then, only information related to the planning filtered will be printed.

### 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

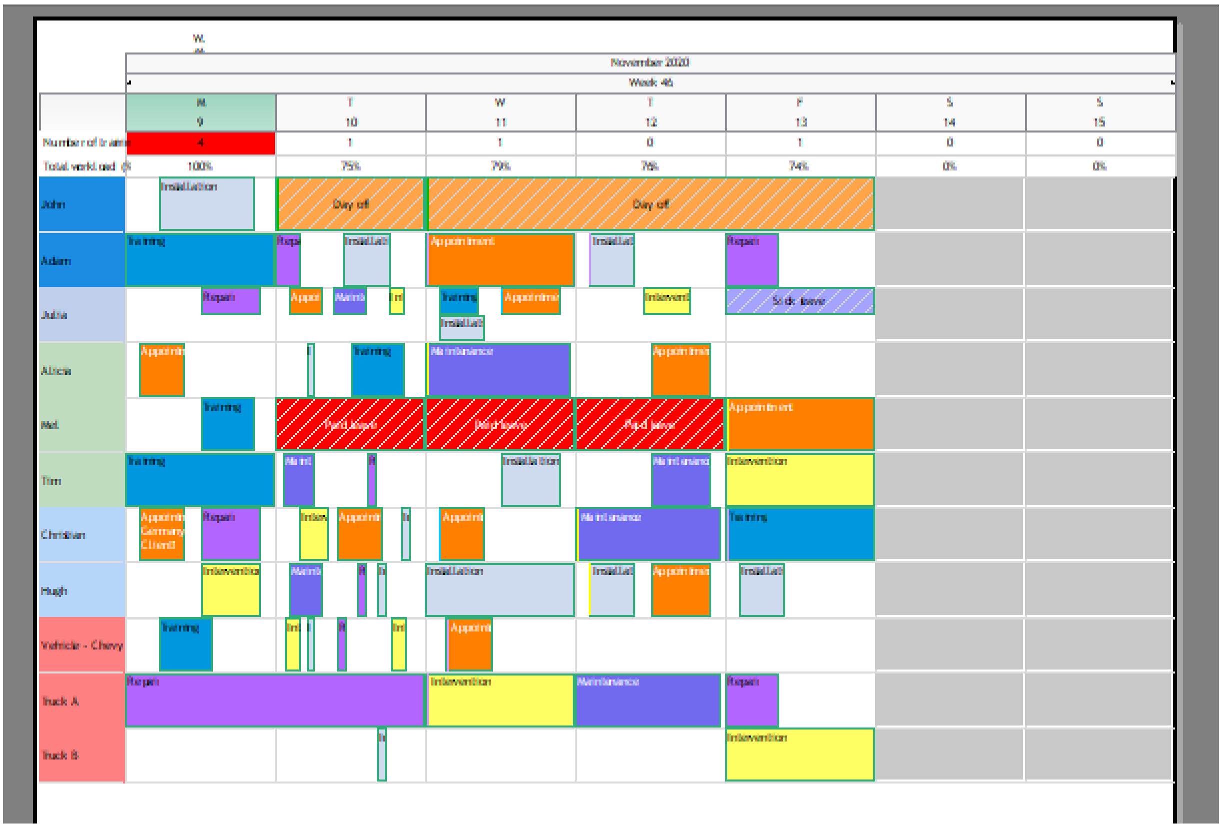
From the menu File -> Print configuration, you have those parameters available: Printer, Page Size, Orientation.




## Overview of all the prints available

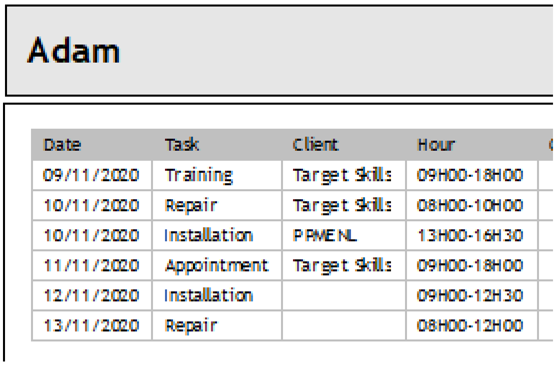
### Graphic schedule

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.



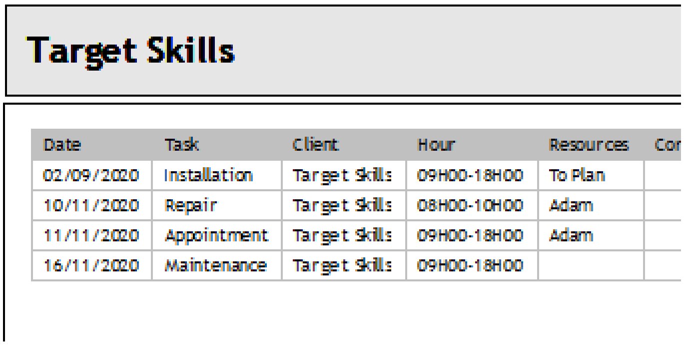
## Adam

| 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

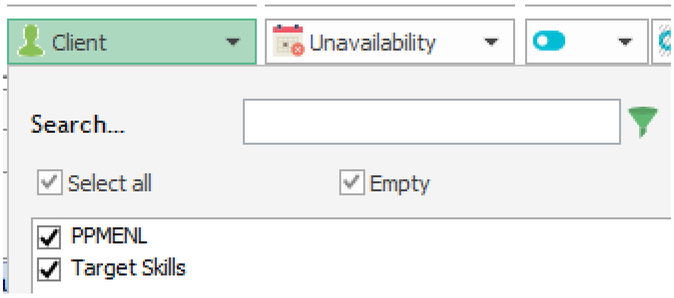
It is the operational schedule per client on the period selected on your screen.



## Target Skills

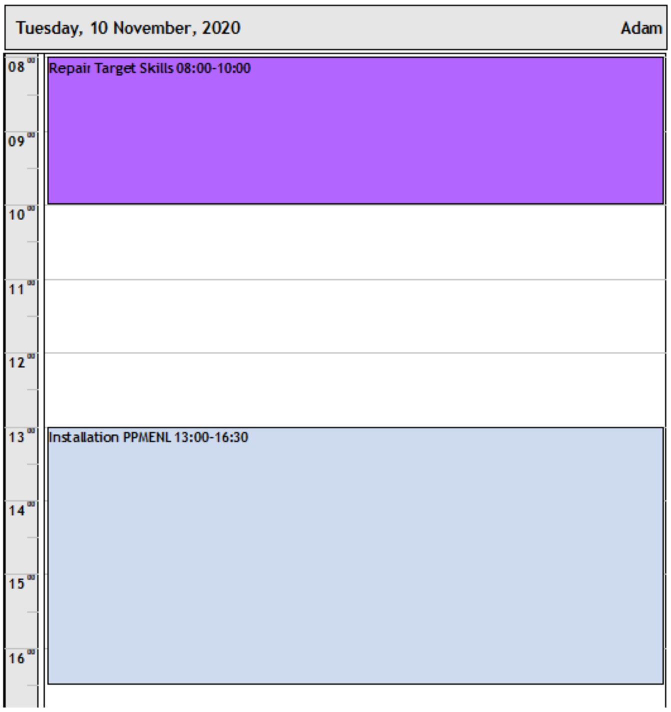
| Date | Task | Client | Hour | Resources | Cor |
|---|---|---|---|---|---|
| 02/09/2020 | Installation | Target Skills | 09H00-18H00 | To Plan | |
| 10/11/2020 | Repair | Target Skills | 08H00-10H00 | Adam | |
| 11/11/2020 | Appointment | Target Skills | 09H00-18H00 | Adam | |
| 16/11/2020 | Maintenance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

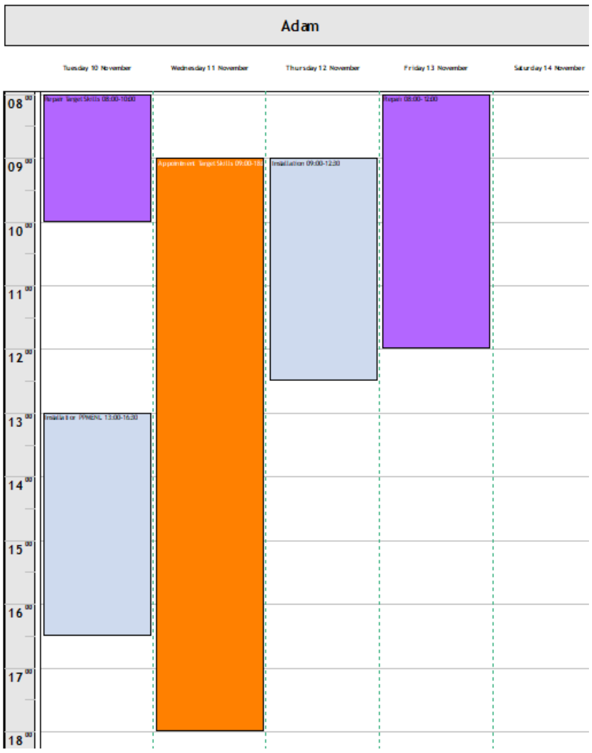
If you wish to print the schedule of a single client, select it first on the client drop down menu.




### 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 | Alicia | 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 | PPMENL | 13H00-16H30 |
| 10/11/2020 | Alicia | 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 | Hugh | 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<br>1-3 Rue Marcel Carné<br>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.

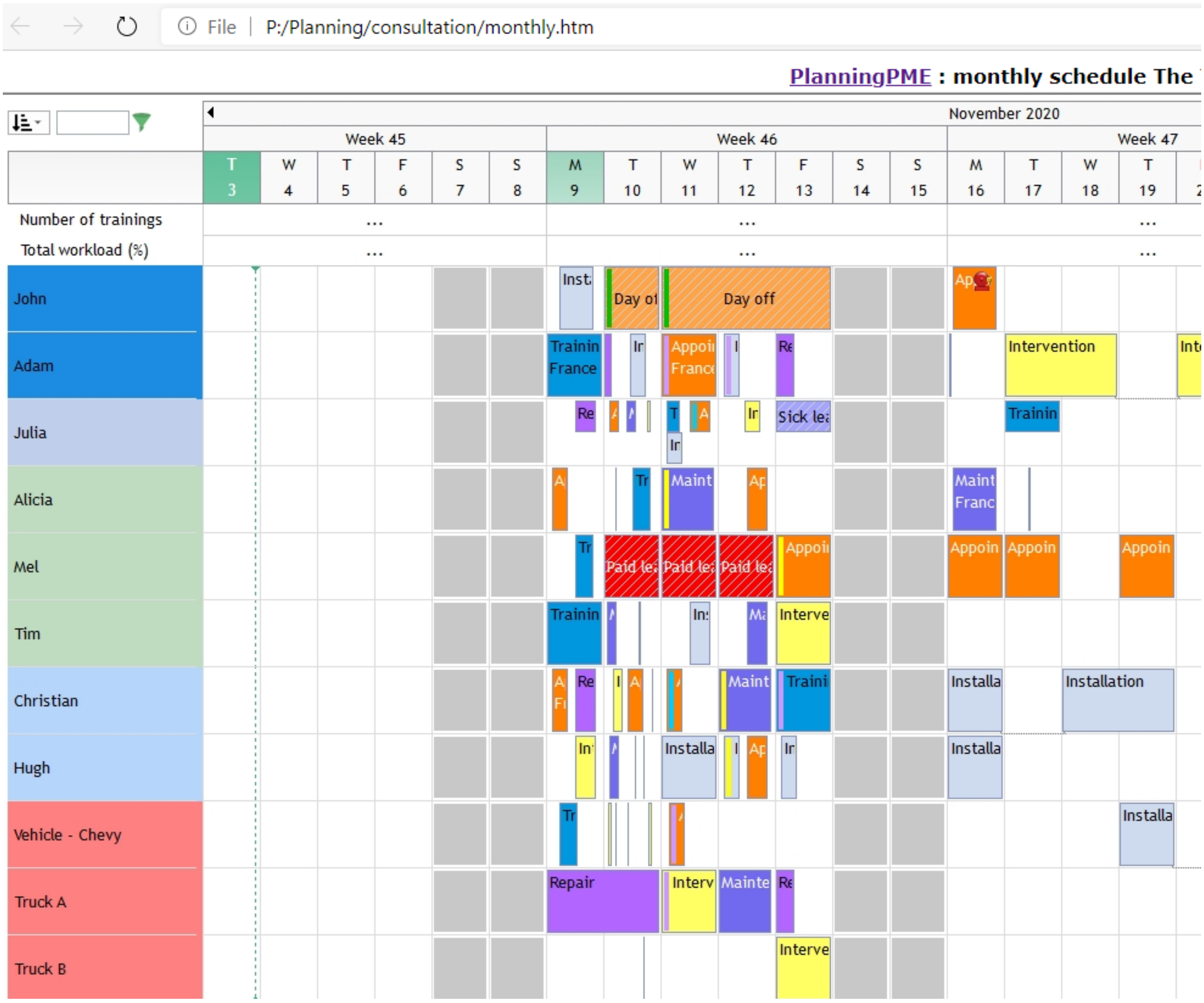
# Notify your employees

## Visualisation to HTML pages

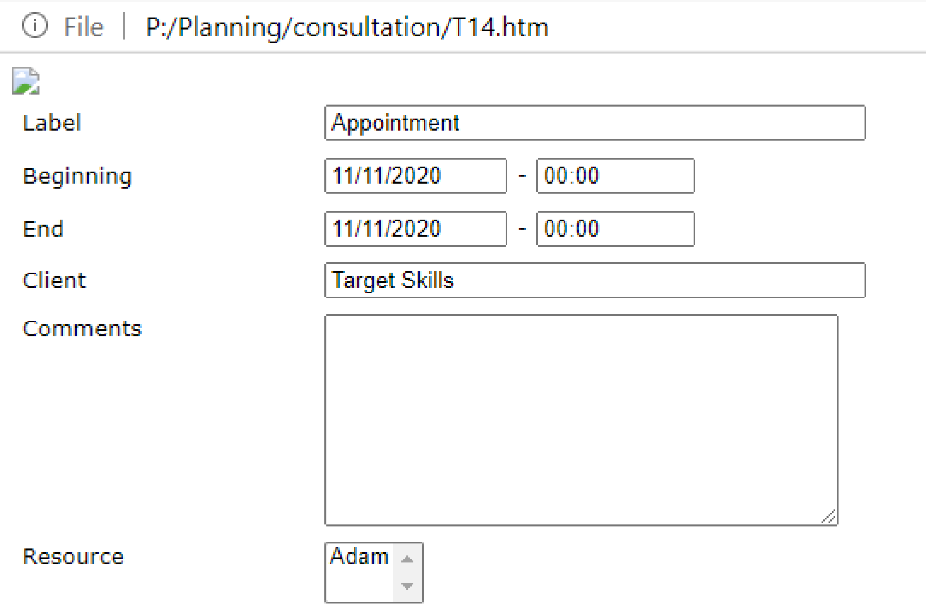
Regularly, you can send your schedule on your local network or on the Web under HTML pages in order all the employees to **visualize** the daily, weekly schedule.
Careful: You cannot make any changes from the Web on the schedule.

### Definition

You can generate HYTML pages of the planning for visualisation.



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

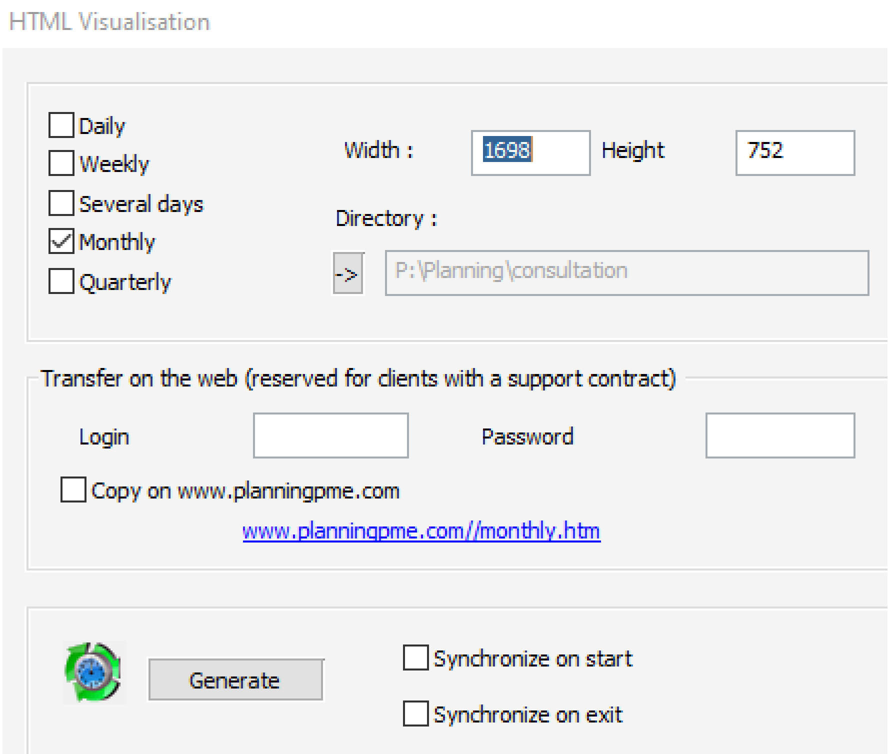



**Careful: Only resources that appear on your screen are synchronized.**

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"



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)

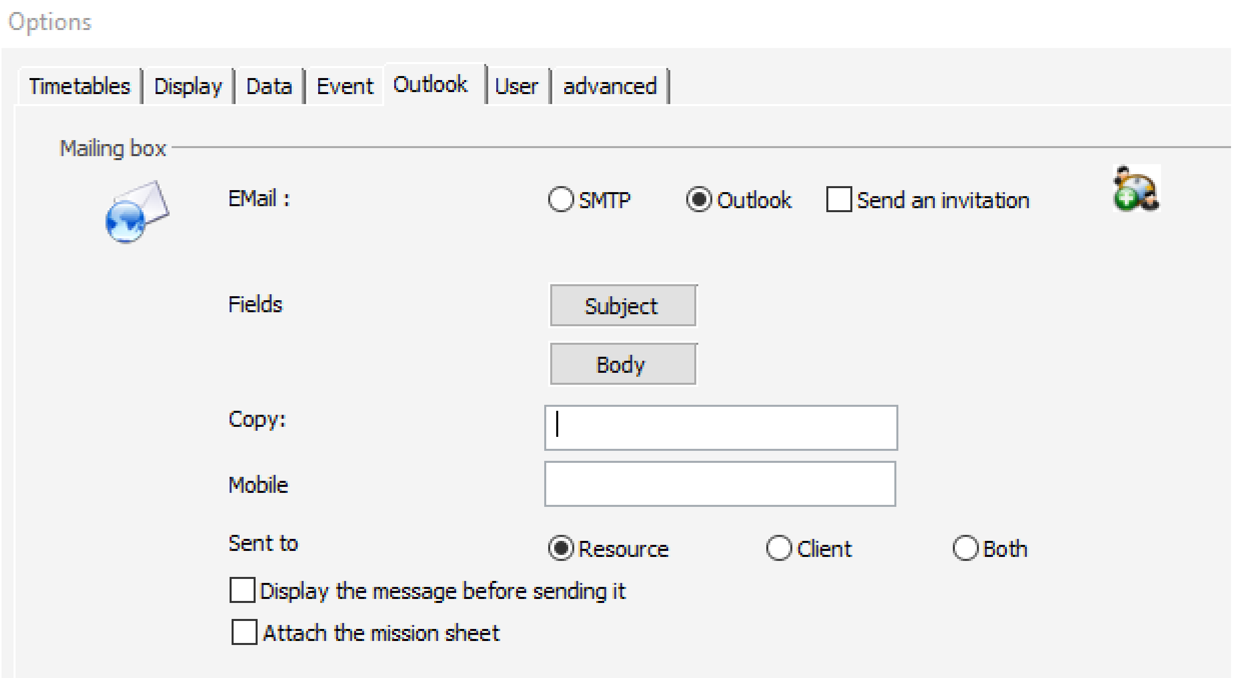
### Generate

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.



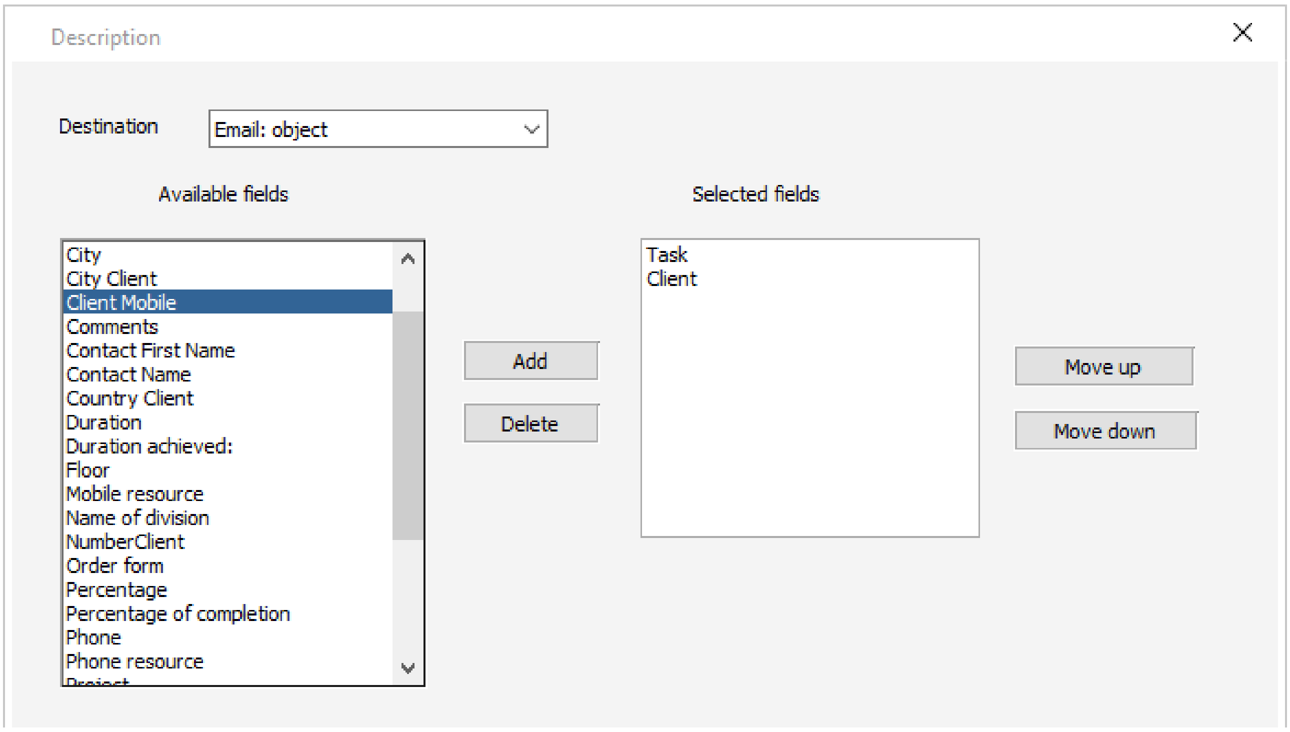

### SMTP Configuration

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

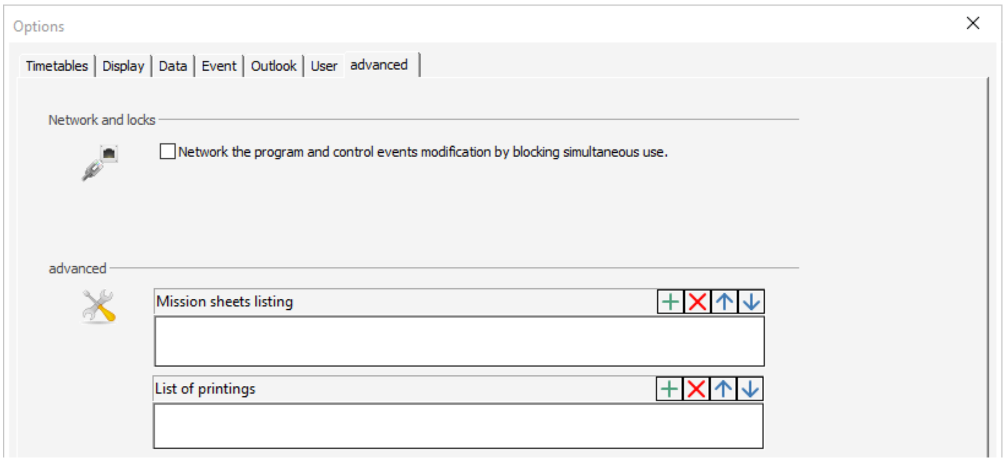
You can also select the fields you want to have while sending an email from the button "Body".

### 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

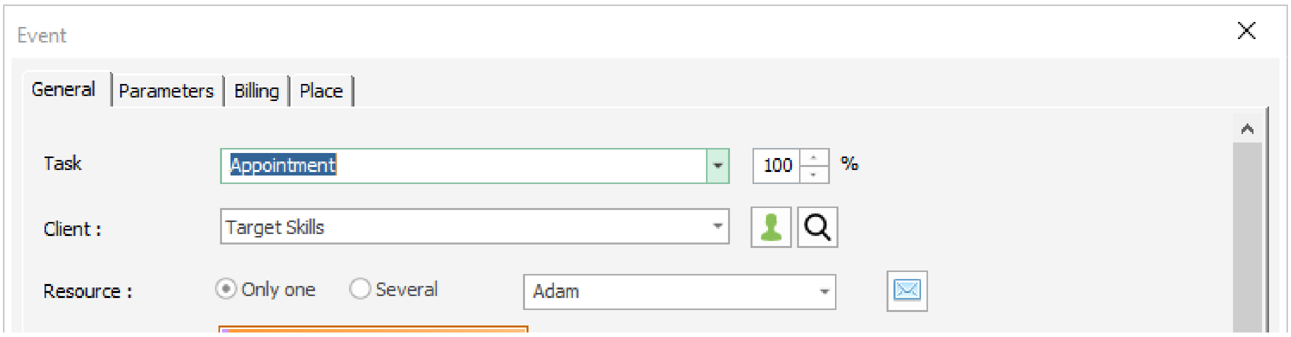
It is possible to attach a customized mission sheet while sending an email.
This mission sheet is the one you specified from Tools -> Options -> Mission Sheet.




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

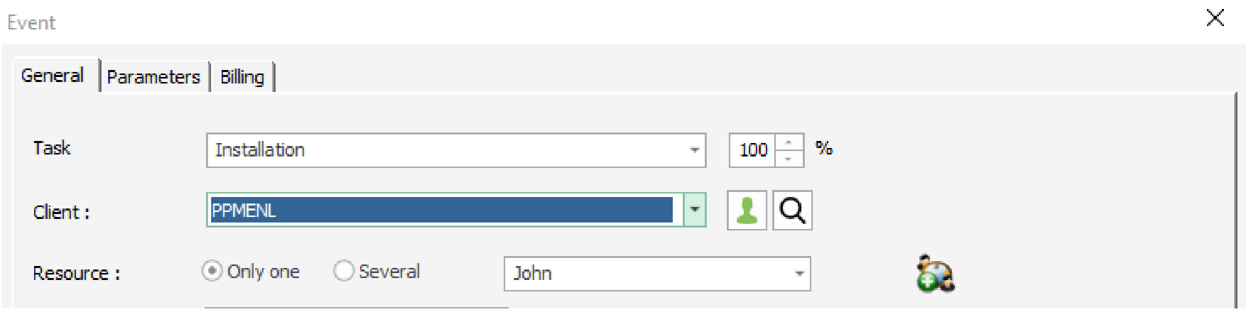
Fill in the email address of your resources and clients to have the option activated: **envelop icon**



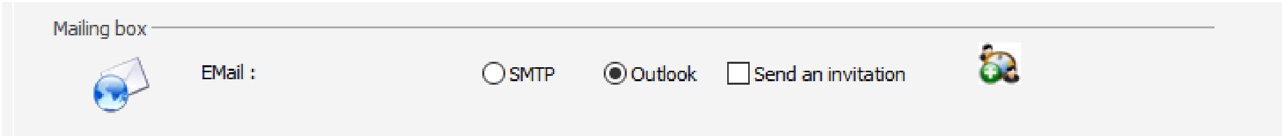

On the "Event" window, click on the envelop icon to send an instant message to all resources assigned to the event, to the client or both depending on the options previously selected.

## 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:

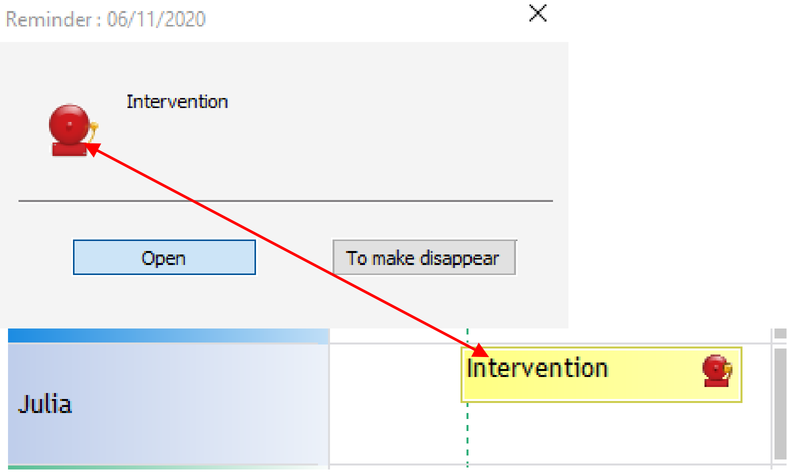



You can activate this option from Tools -> Options > Outlook.



# Visual alarm

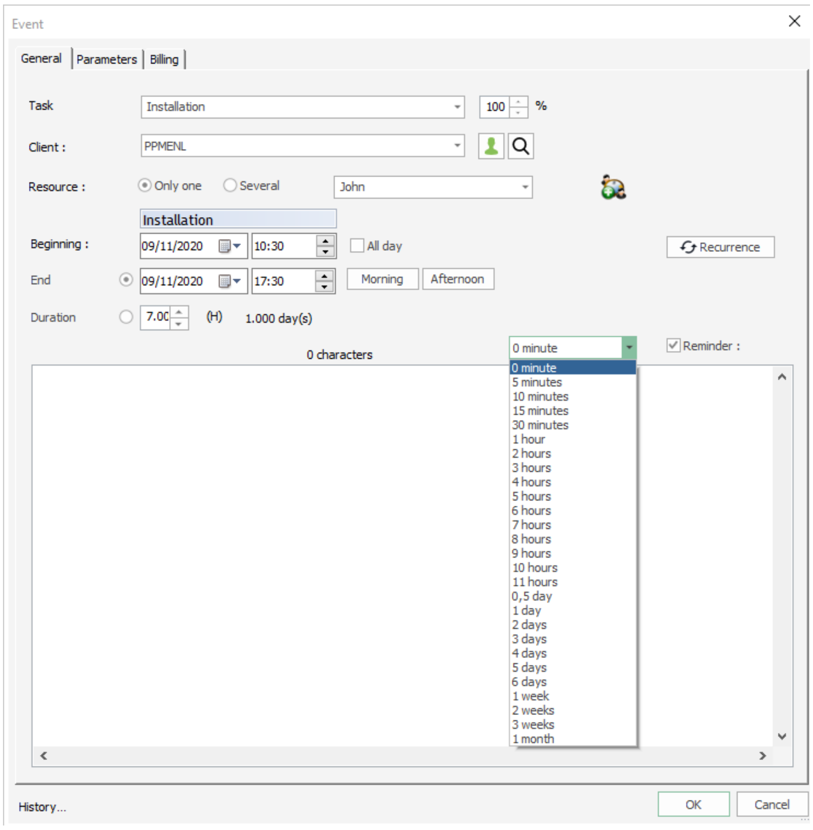
You have the possibility to use a visual alarm which will remind you an event before its beginning: 5 minutes, 10 minutes, one hour before... or at a precise date and time.




## Activation of a reminder before the beginning of an event

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

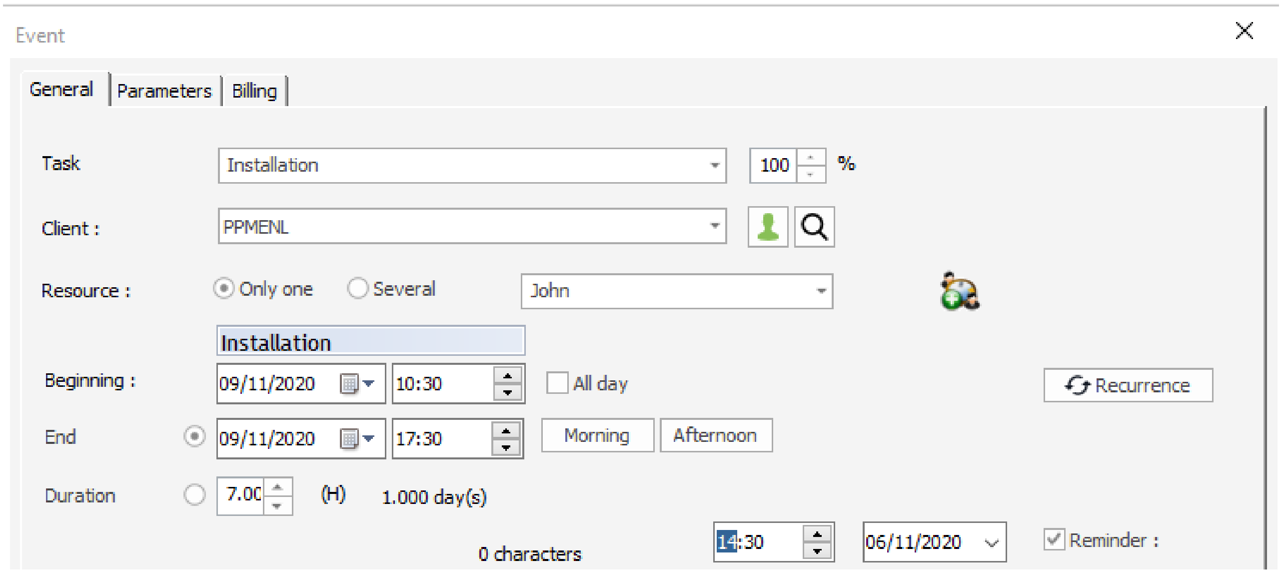
If you enter the planning with user rights, the reminder will be activated on the session of this user only. The other users will not see the reminder.



## 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:



## Events notifications

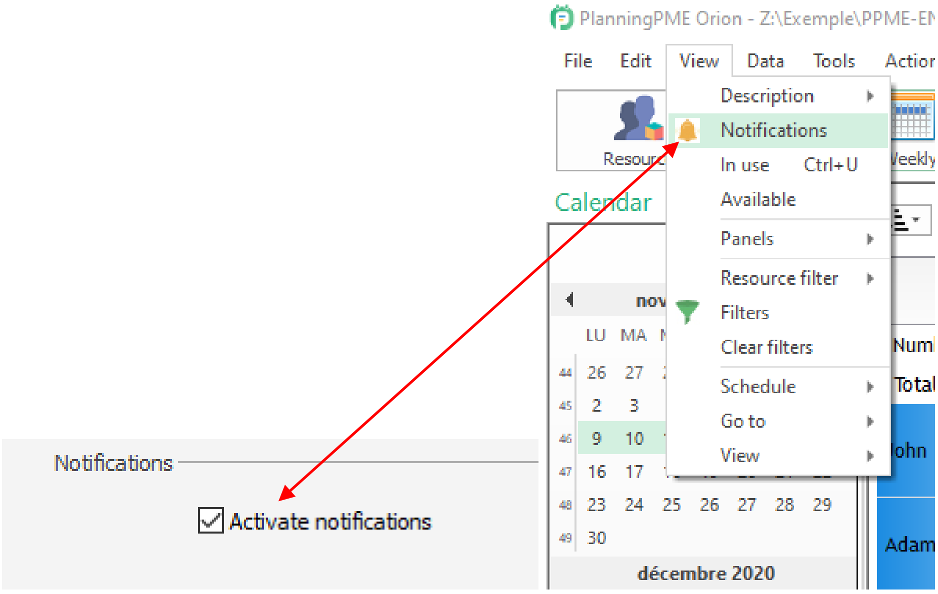
Be informed at a glance of the last changes on your planning via badges or notifications on the toolbars

### What is a notification?

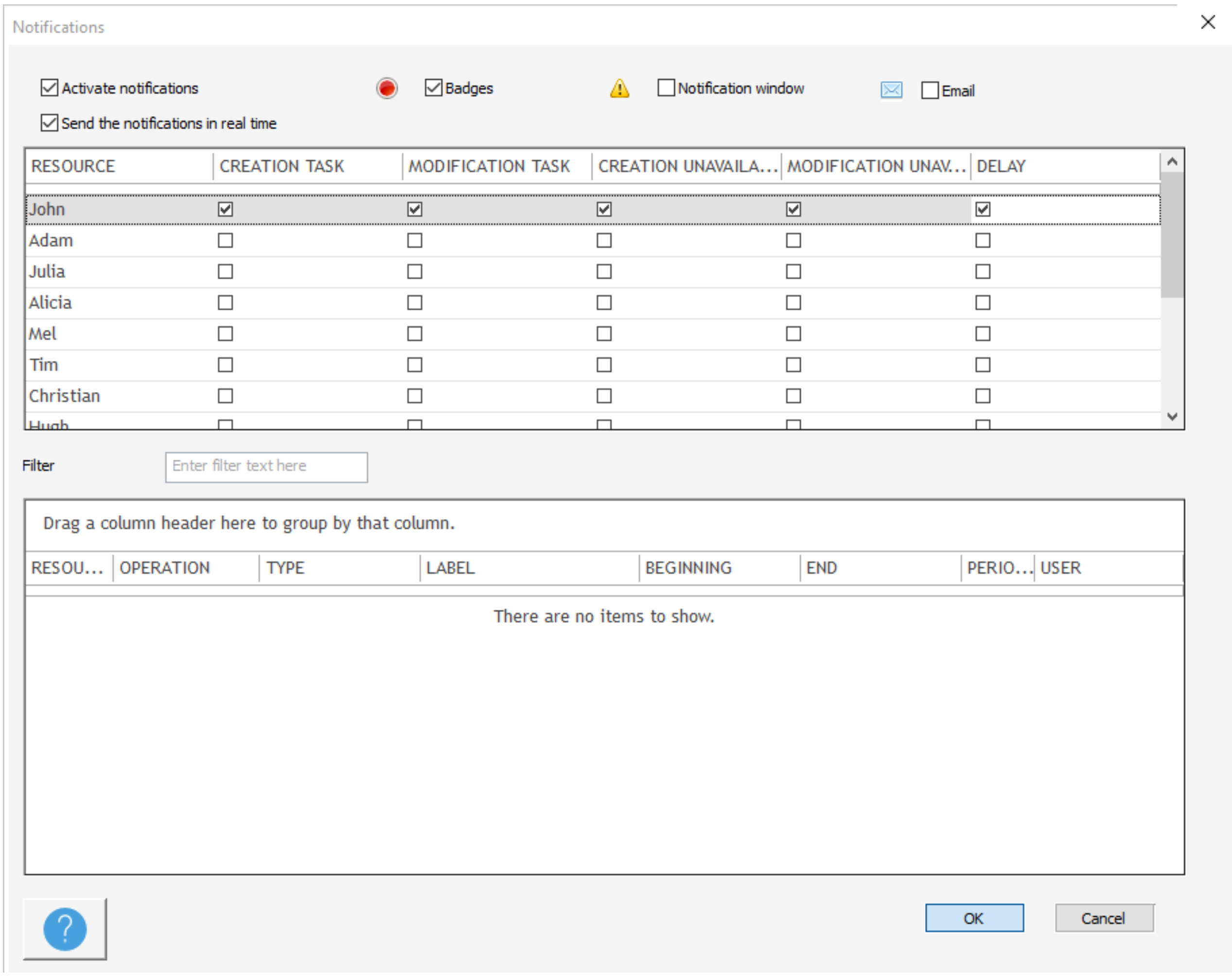
A notification informs users of new or modified events and/or unavailabilities that are related to the planning activity.
The notifications can be defined per user and you can have relevant information on events and/or unavailabilities changes for one or several resources.
Notifications can be activated 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".



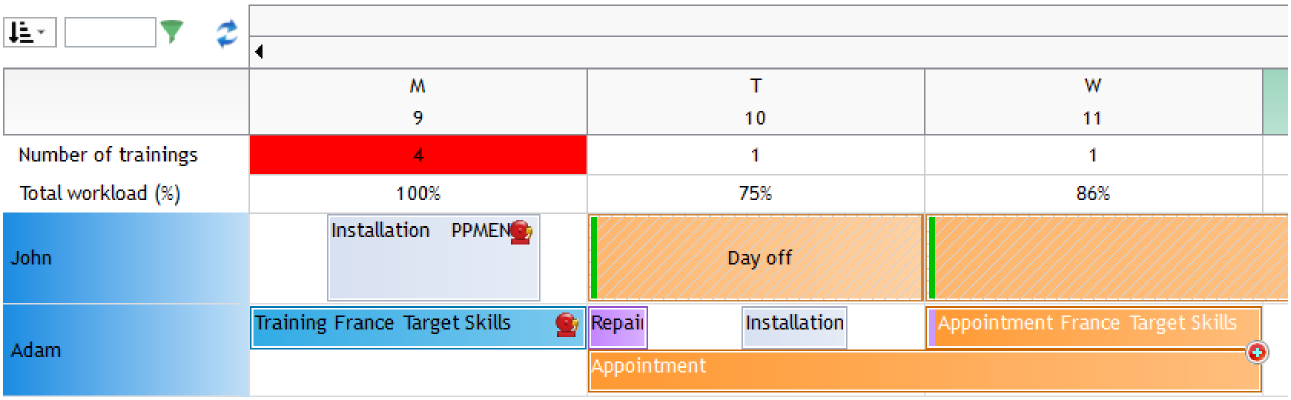

Then, each user will do the settings of his own notifications: when connecting to his session (users rights must be activated in the software), he can decide whether he wants to be informed of additions and/or modifications of the events allocated to the different resources listed.


Notifications
Activate notifications
Badges
Notification window
Email
Send the notifications in real time
RESOURCE
CREATION TASK
MODIFICATION TASK
CREATION UNAVAILA...
MODIFICATION UNAV...
DELAY
John
Adam
Julia
Alicia
Mel
Tim
Christian
Filter
Enter filter text here
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

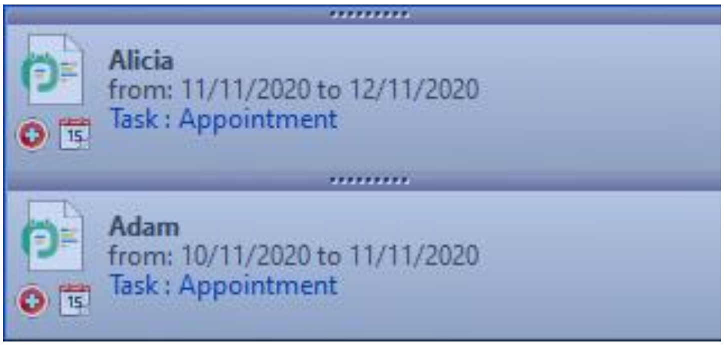
When a user logs in to the planning board, red buttons indicate which events (events or unavailabilities) were created or modified on the scheduler.

### Notification of the type "Badges"



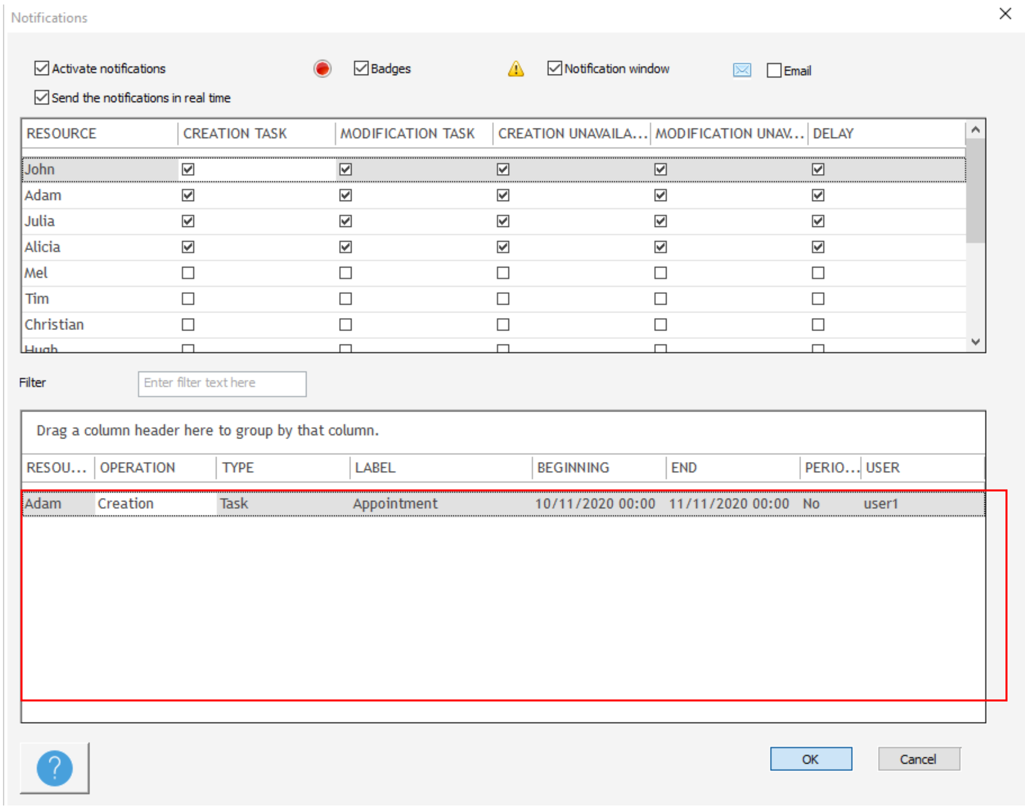

The icon with a "+" symbolises a new event.

### Notification of the type "Windows notification"




### List of notifications

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




### Remove the notifications icons

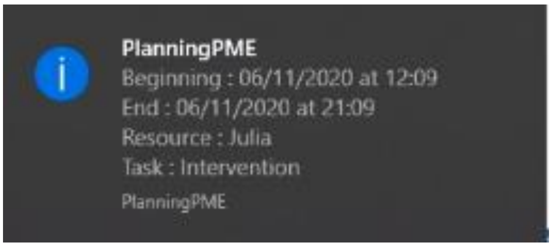
If you want to remove the notifications icons, you just need to open the event or the unavailability. You can also deselect the option "Activate notifications" from the menu View -> Notifications.

## 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

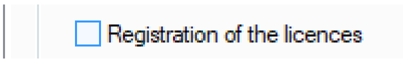
## Users rights

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

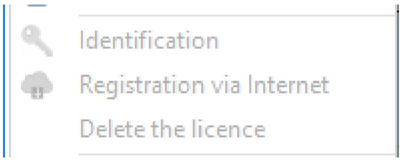
### Vocabulary used

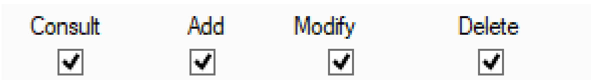
For each field of the software, you will have one or several boxes to select depending on the authorized level of access. The different situations are as follows:

**1st situation: You have only one box to select**
You give access to this field or not.
*Example:*

Right not accessible: 

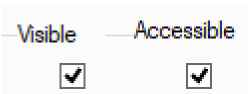
Corresponding menu in the software: Data
The user does not have access to the user rights: fields are greyed out




**2nd situation:** 

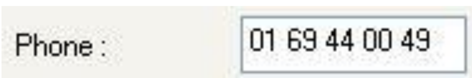
For each data (department, resource...), you can choose the following rights:

**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

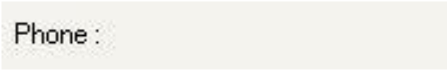
**3rd situation:** 

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:

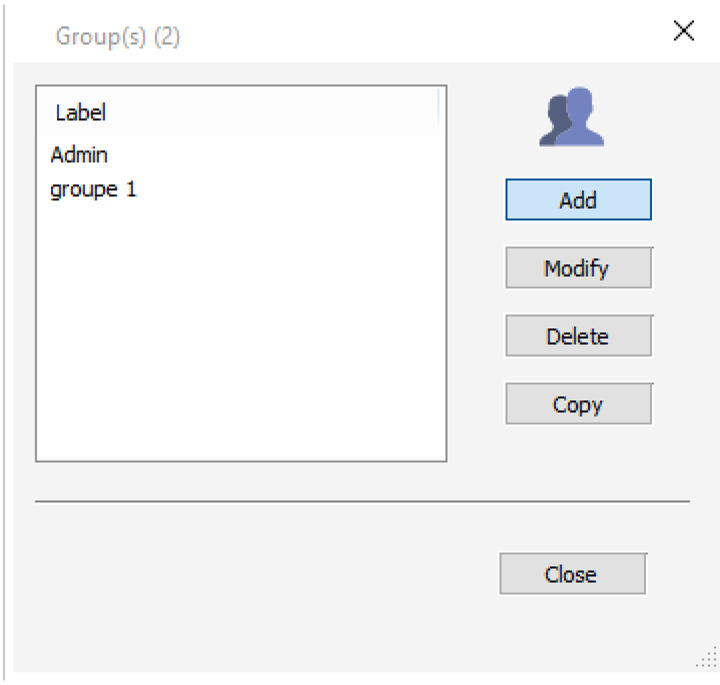
Visible and Accessible: Full rights 

Visible but not Accessible 


Not visible and not Accessible 

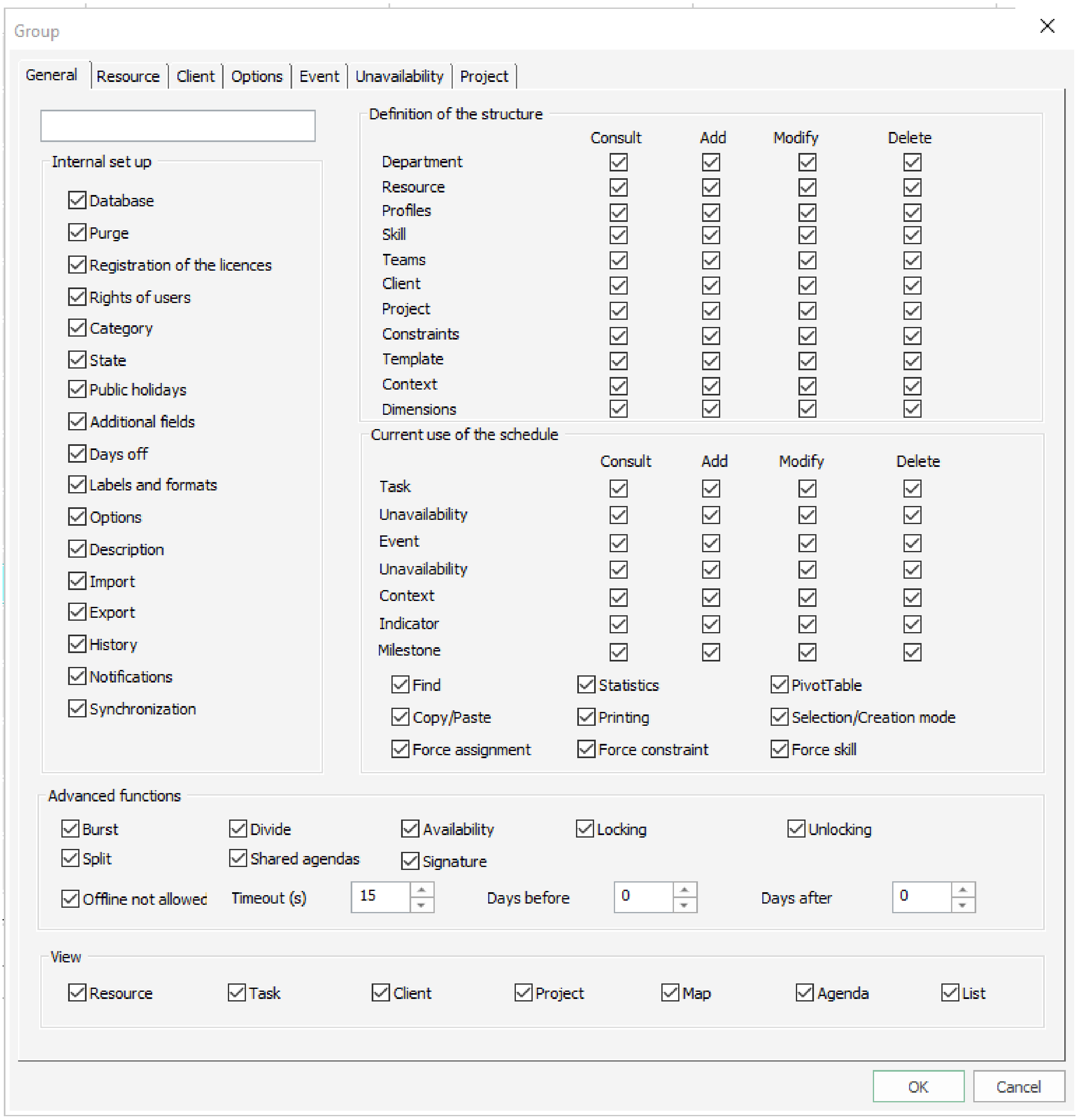

## Groups creation with specific rights

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.

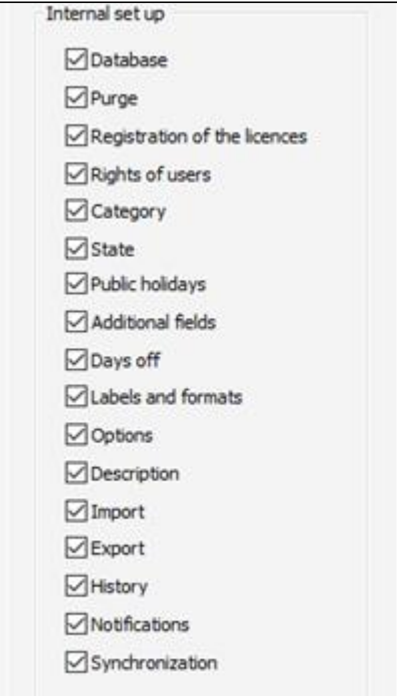
### Tab "General"




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




The internal set up of the software is an operation which occurs while installing the software and then, episodically.
Those operations are done by the Administrator. It is necessary to be trained on the software to modify those parameters which impact every users.

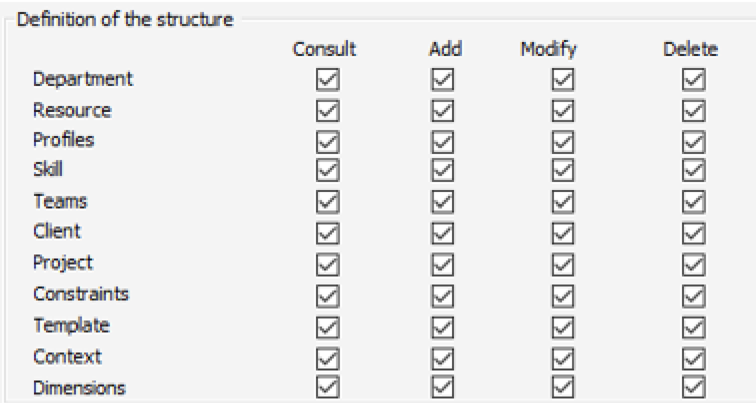
You can choose who can or cannot have access to the following parameters.

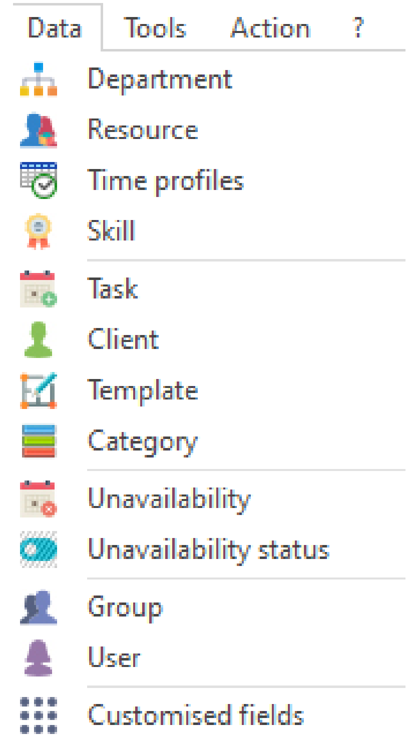
| **Available fields** | **Corresponding fields in the software** |
|---|---|
| Database | File -> New schedule + Location |
| Purge | File -> Database -> Purge |
| Registration of the licences | File -> Identification + Registration via Internet or by file |
| Rights of users | Data -> Group + User |
| 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".

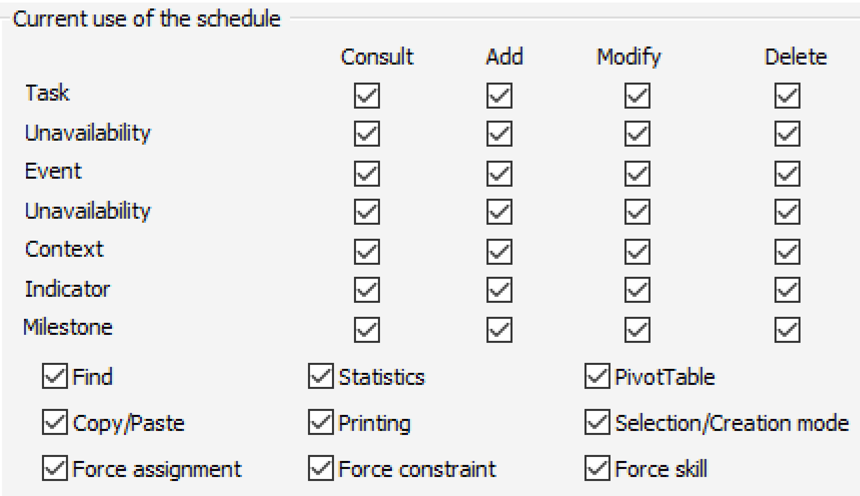
| **Users rights** | **Access from PlanningPME.** |
|---|---|



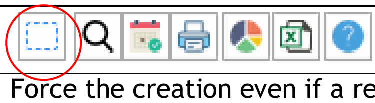




**Current use of the schedule**

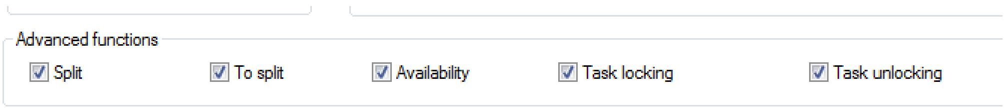
Those functions are currently used on the schedule: a user will be allowed or not to create events, to delete them, to update them.



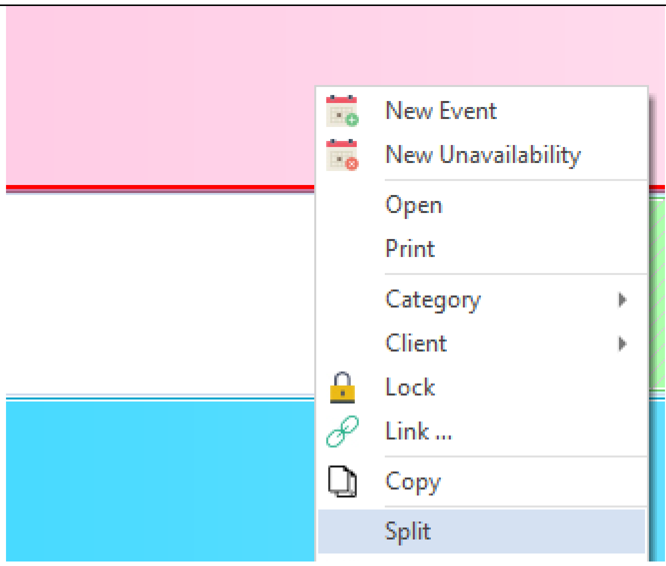
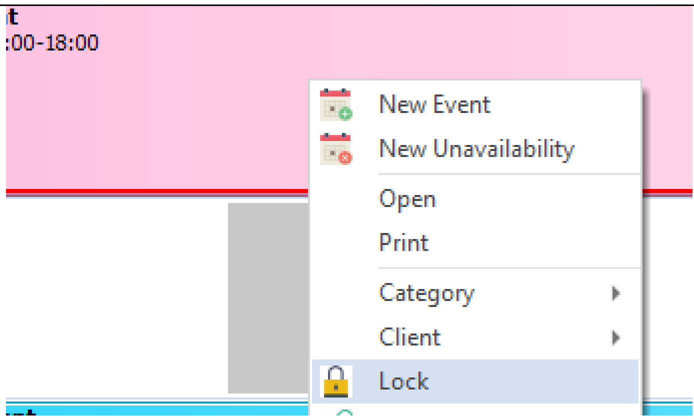

| Available fields | Corresponding fields in the software |
|---|---|
| List of tasks | Data -> Task |
| List of unavailabilities | Data -> Unavailability |
| Event | Direct modification on the planning board |
| Unavailability | Direct modification on the planning board |
| Context | Access to the context 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 contraints | Force the creation even if the contraint is not respected |
| Force Skill | Force the creation even if the resource does not have the skill |

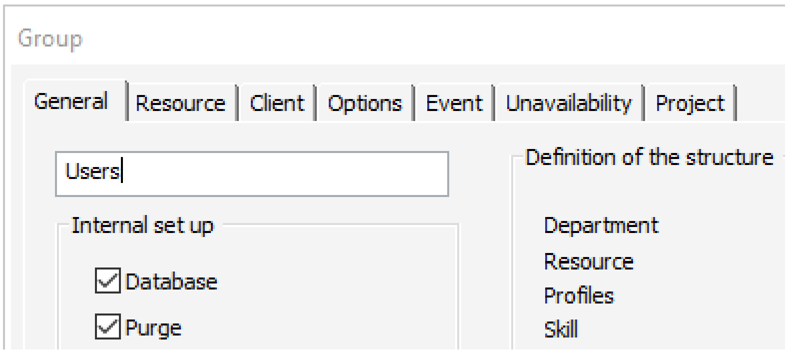
**Advanced functions of the schedule**



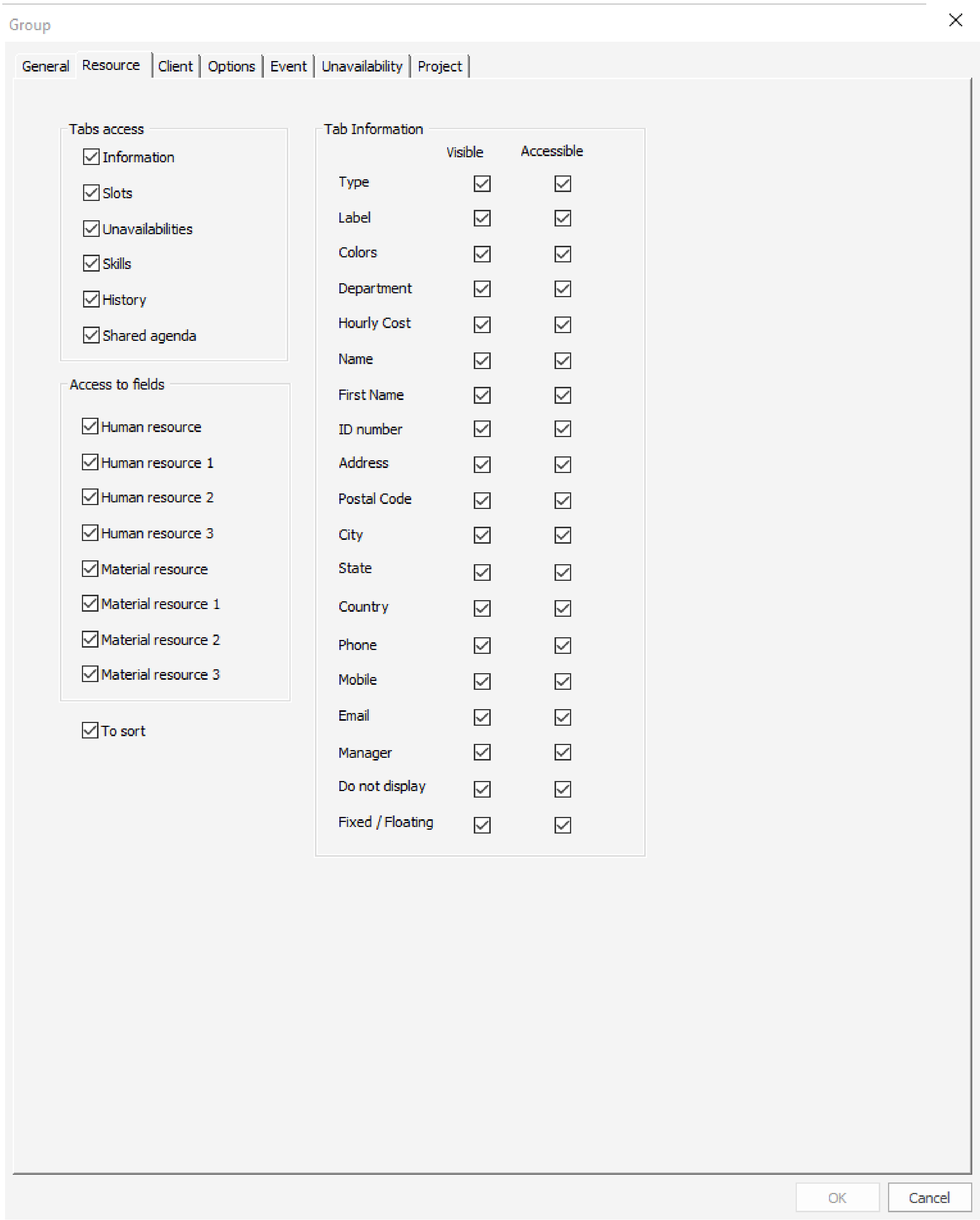

Those functions must be used by trained users!

| 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.

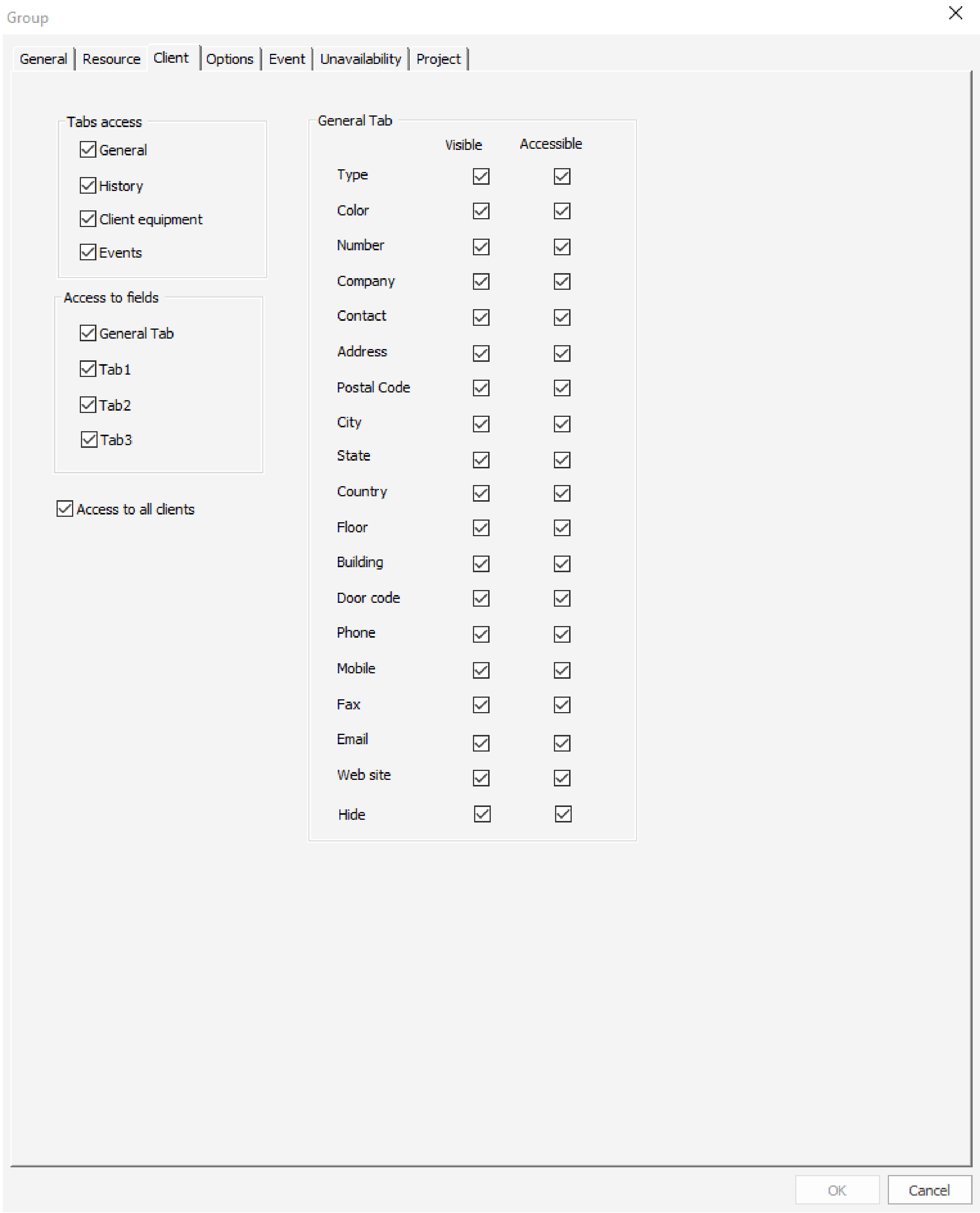

Group
General
Resource
Client
Options
Event
Unavailability
Project
Users
Internal set up
Database
Purge
Definition of the structure
Department
Resource
Profiles
Skill

## Tab "Resources"



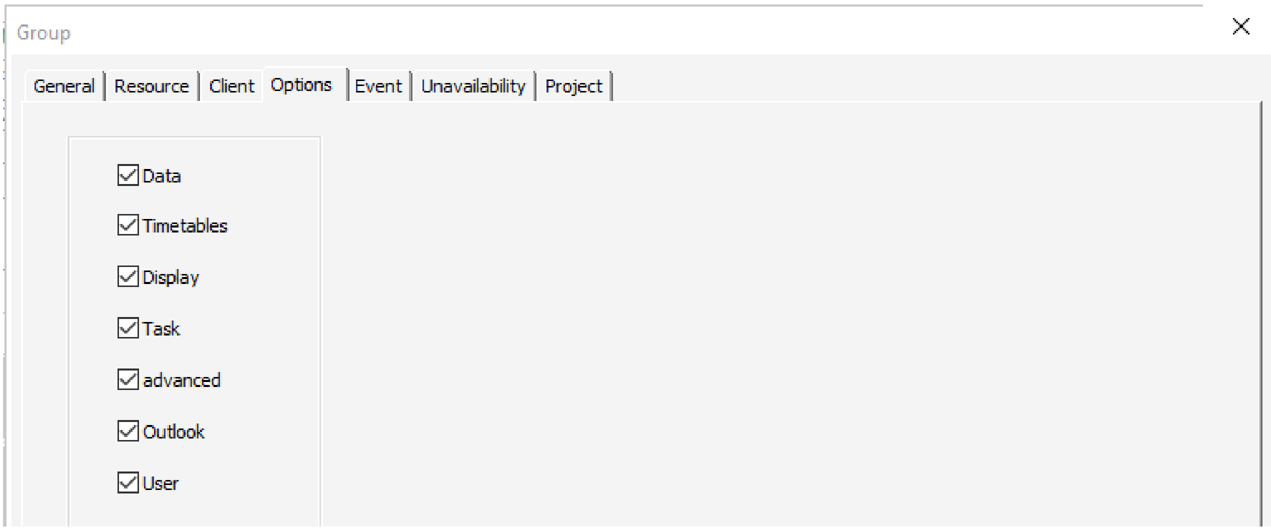

Each resource has a personal card. For each information, users rights can be assigned.
Access to the tabs: the tabs of the card are accessible or not
Tab Information: For each fields of this tab, it is possible to give a right to visualize and a right to modify.
"Human resource" and "Material resource" are tabs with additional fields customizable that can be created on the resource card from the menu "Data" -> "Additional fields".

## Tab "Client"



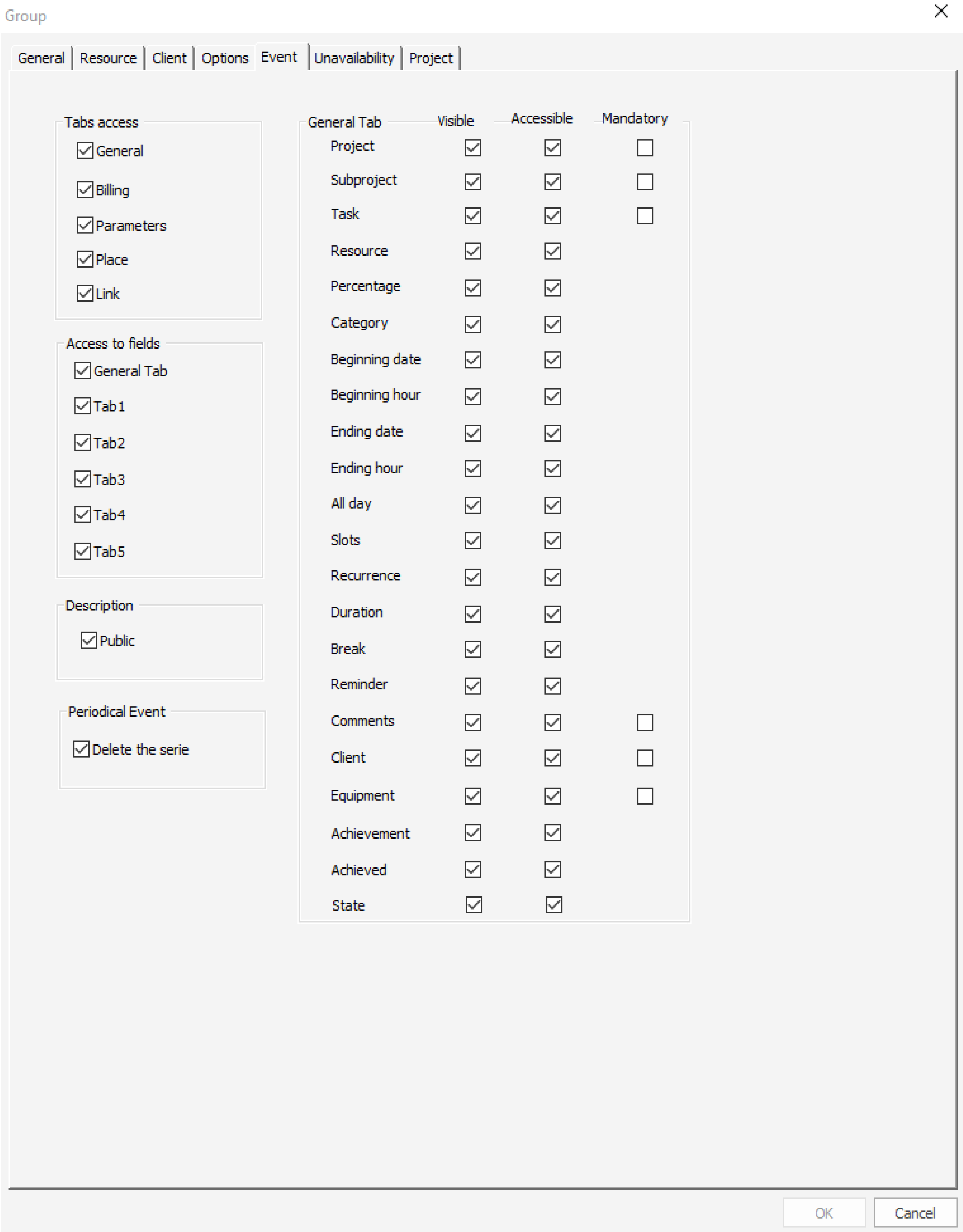

Each client has a personal card. For each information, users rights can be assigned.
Access to the tabs: the tabs of the card are accessible or not
Tab "General": For each field of this tab, it will be possible to give rights of visualization and accessibility

### Tab "Options"



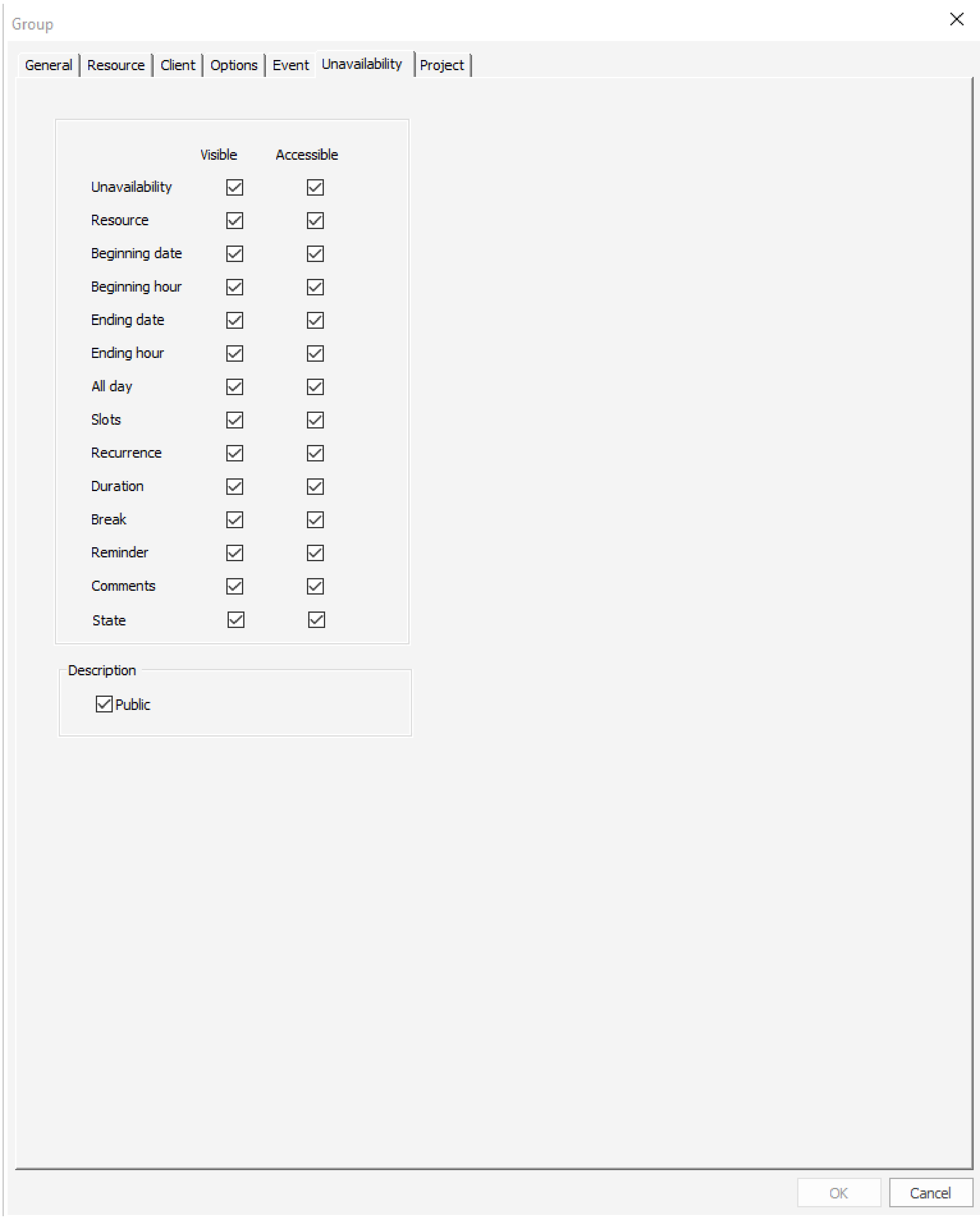

You can give access or not to the tabs of the menu "Tools" -> "Options":

## Tab "Event"




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"

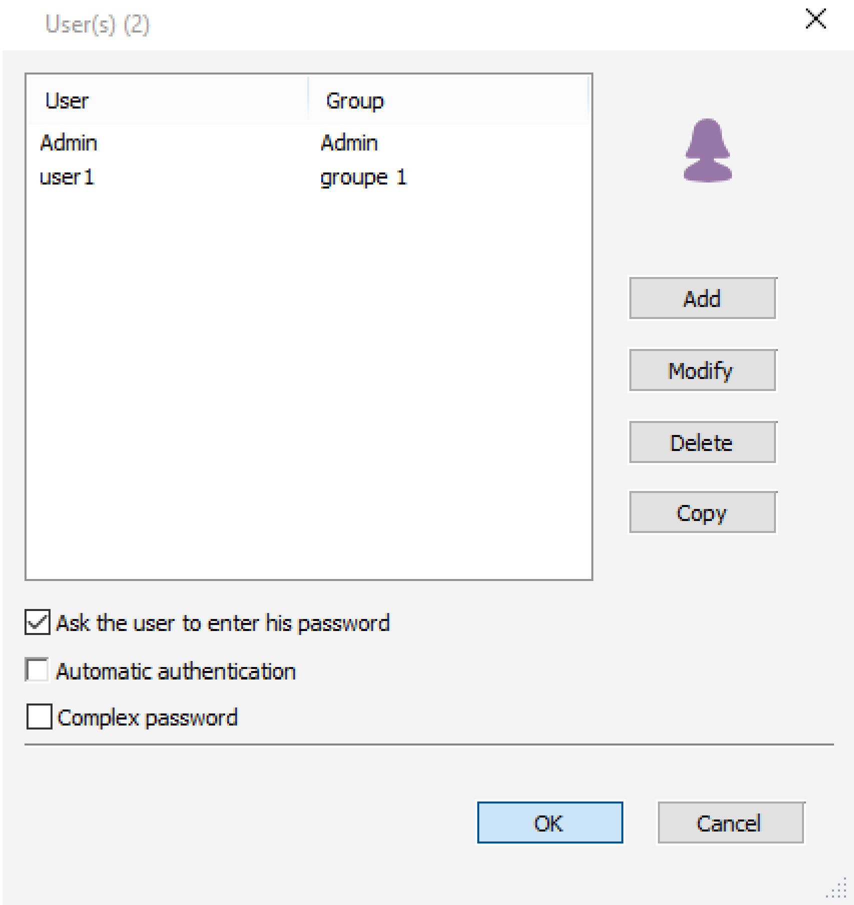


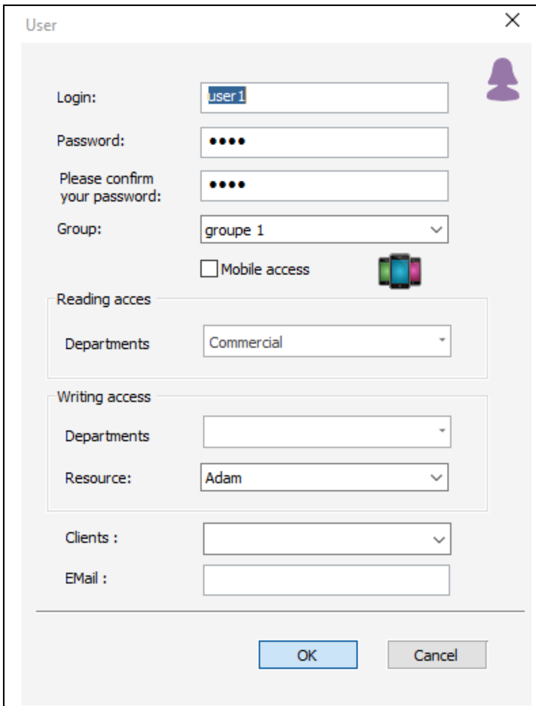

For each information of the unavailability window, access rights can be assigned. For each field of this tab, it will be possible to give rights of visualization and accessibility.

**Once all your groups registered with specific rights, you can create the users.**

## Creation of the users

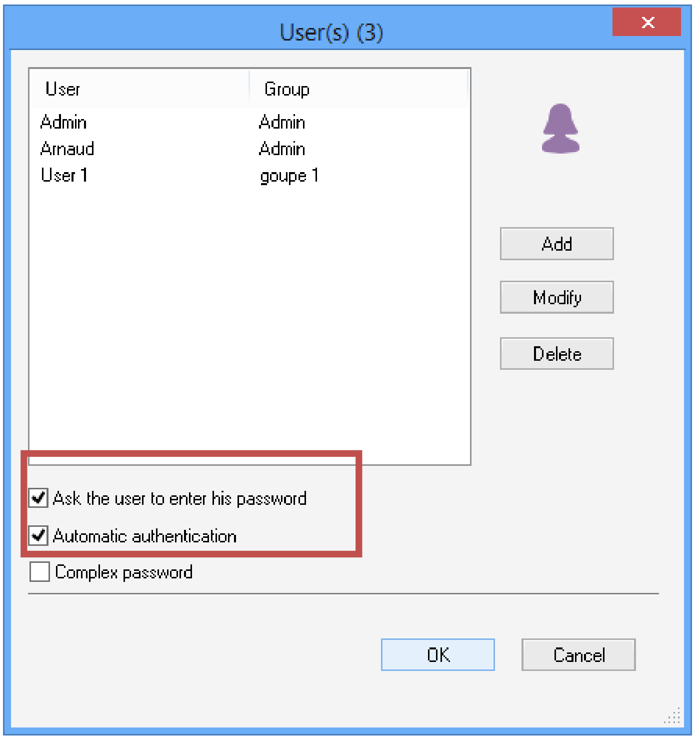
From PlanningPME, go to the menu "Data" -> "Users". You can create a login and a password for each user.



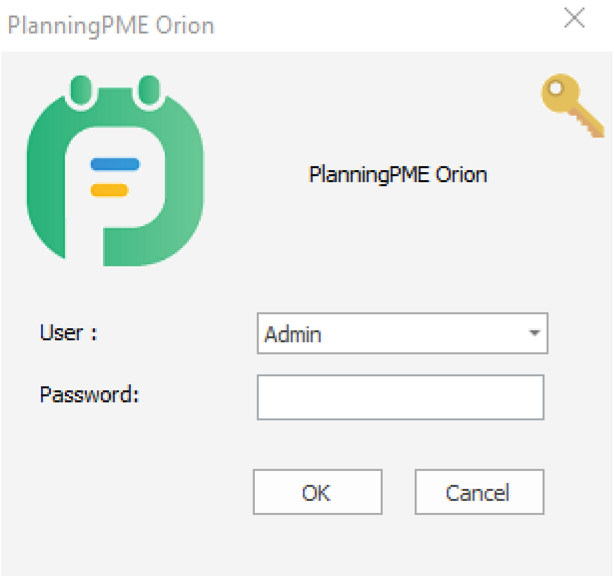

Enter a login
Enter a password
Confirm the password
Assign a group to this user
Mobile Access: to have this user on the mobile application
Select the department(s) this user can visualize.
Select the department(s) the user will have access in writing
Select the resource that corresponds to the user if needed

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.



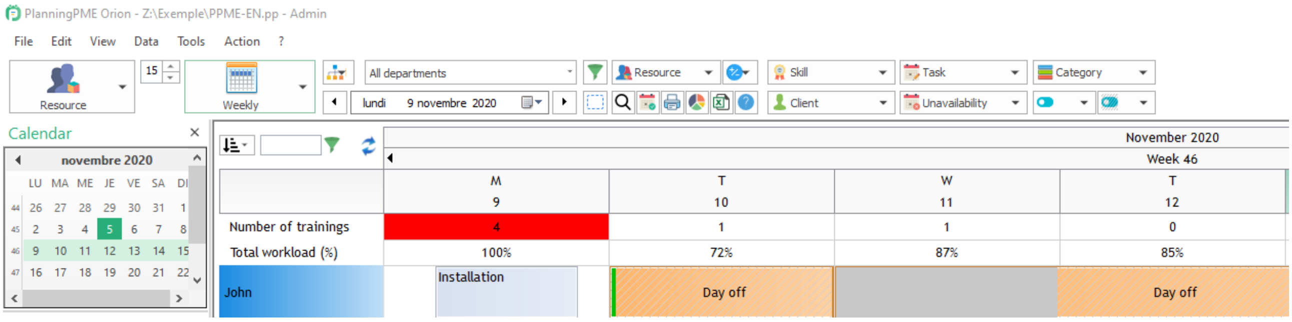

Depending on your rights, you will have an access limited to the schedule.

## 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.

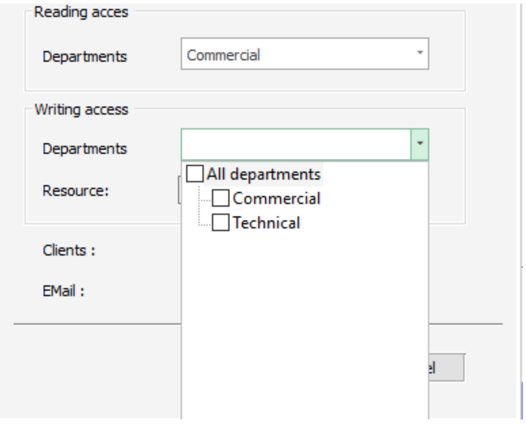
## Give access to only one resource

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.



## Select or deselect all departments

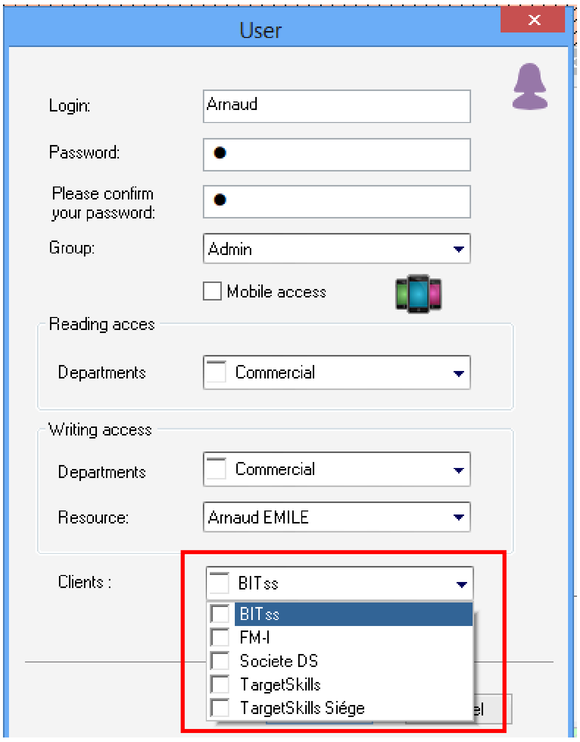
Right click at the top of your drop down list of department to save time checking on or off all boxes.



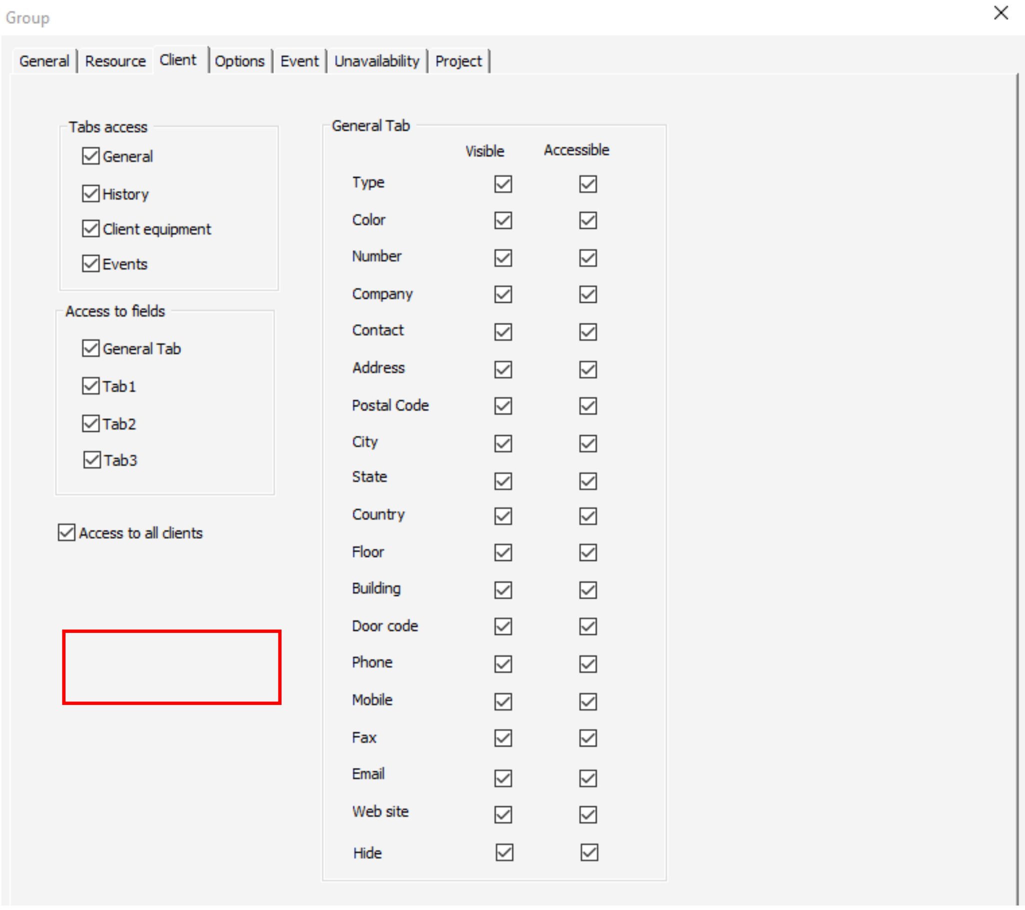

## Access rights to clients

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.




**NB:** You will first need to create a group with a minimum condition: « Access to all clients » must be unchecked.




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

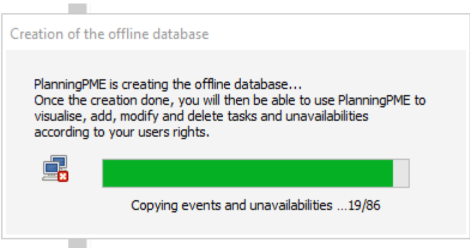
We now added a new feature that allows you to **work off-line** with your planning!
Indeed, if you are not connected with your network (disconnected from your database), you will still be able to create and modify events and unavailabilities on your schedule.
While reconnecting to your network, events 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

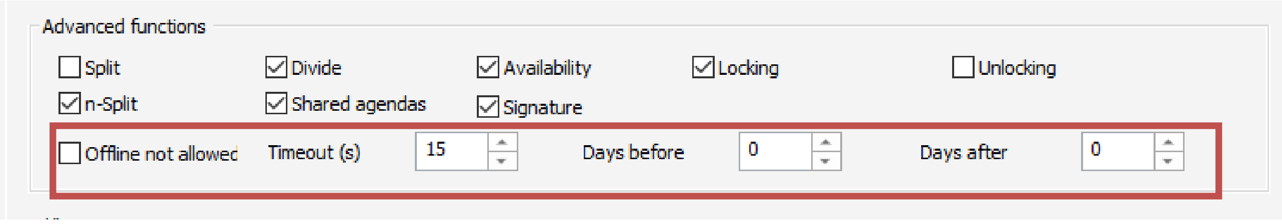
| | |
|---|---|
| Database | SQL Server |
| Activation | Create Groups and users |
| When Offline | |
| You can | Create events and unavailabilities |
| You can not | Create new clients, projects, resources etc... |

### How to activate this feature?

Note that the Admin Group can not have access to the “Offline” mode as this feature is desactivated 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**



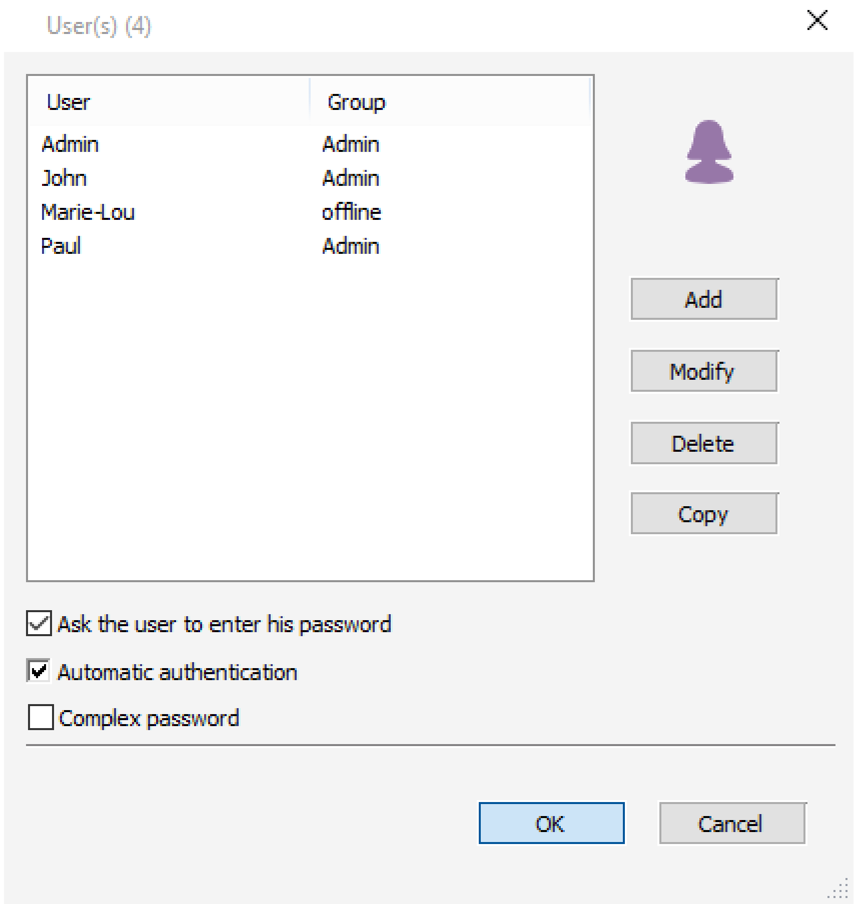

Deselect “Offline unauthorized”.

**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.

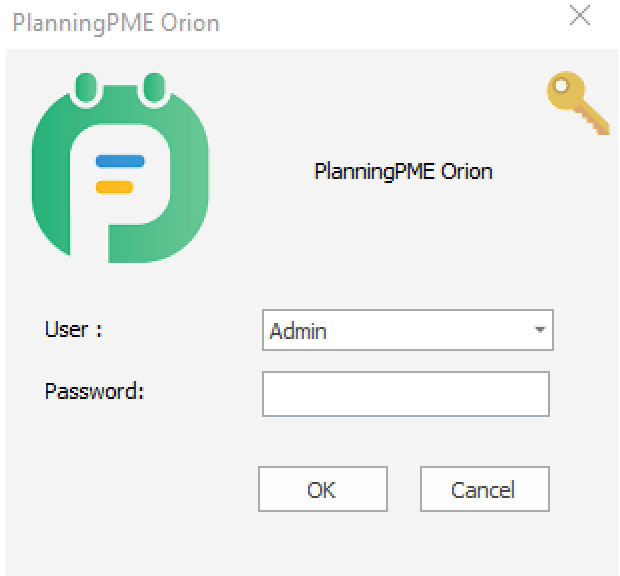
**Menu Data -> User**

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”.



### Connect to the planning with your users rights

Then, you can open PlanningPME with your login and password:

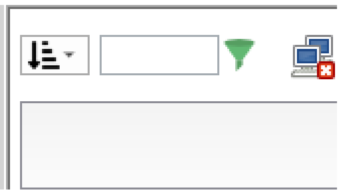



### When is the offline database created?

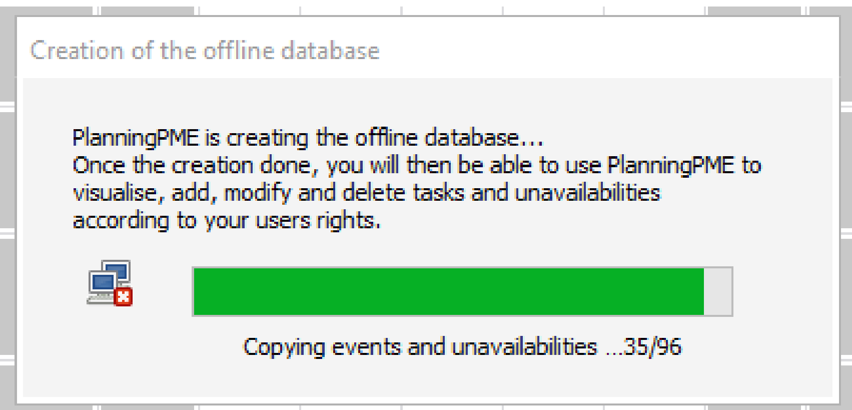
The Offline database is created when you close PlanningPME or when you are disconnected from the database.

### 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.

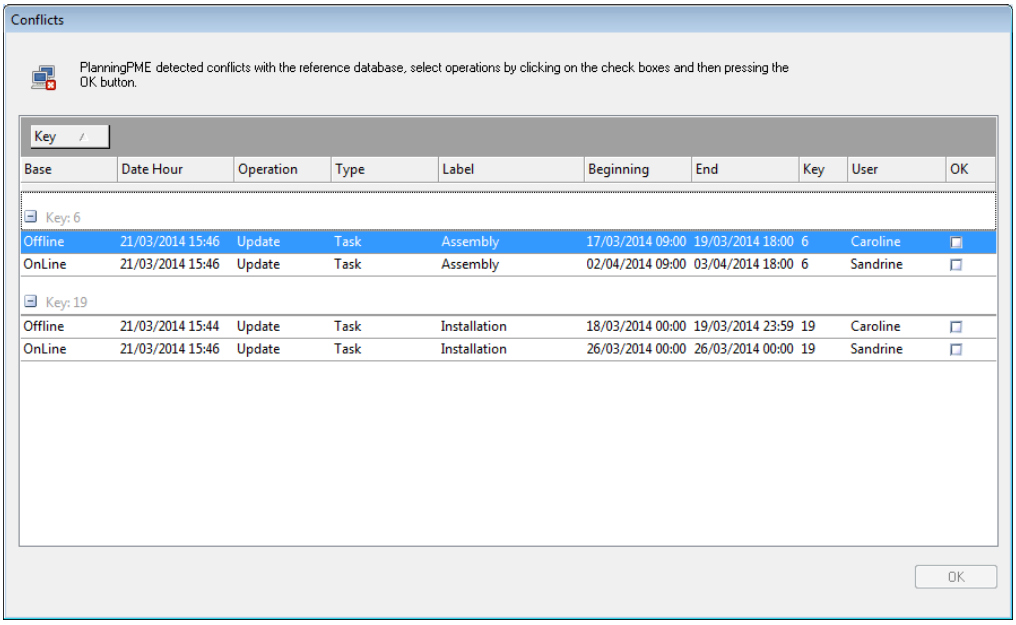
-> You can not:
The user can not Add/Modify/Delete resources, customers and projects (Settings that are in the menu Data basically).

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:

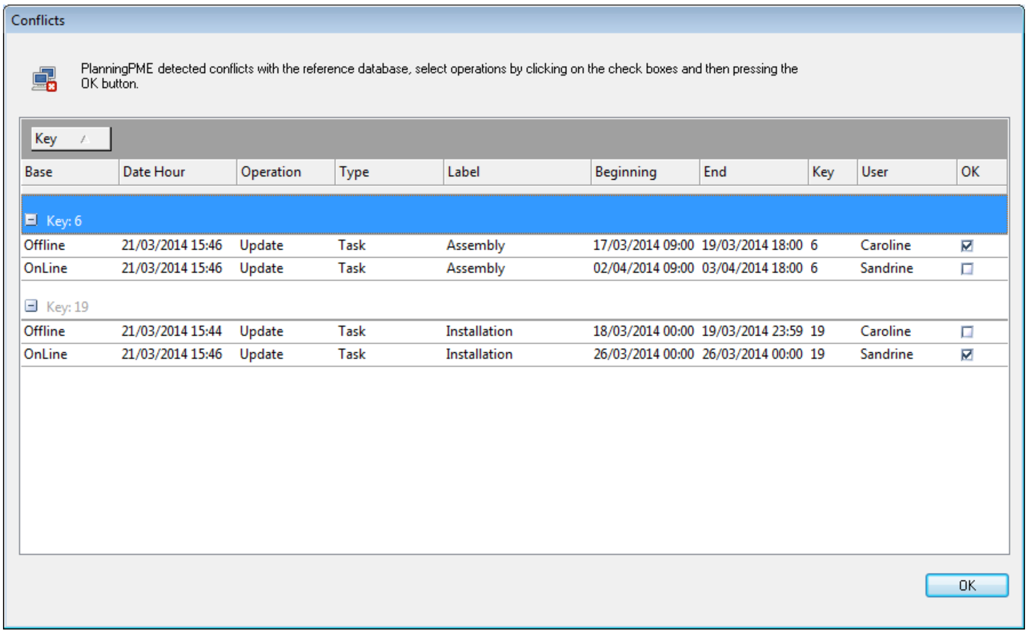



**-> You need to solve conflicts first before being able to work again online.**

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:



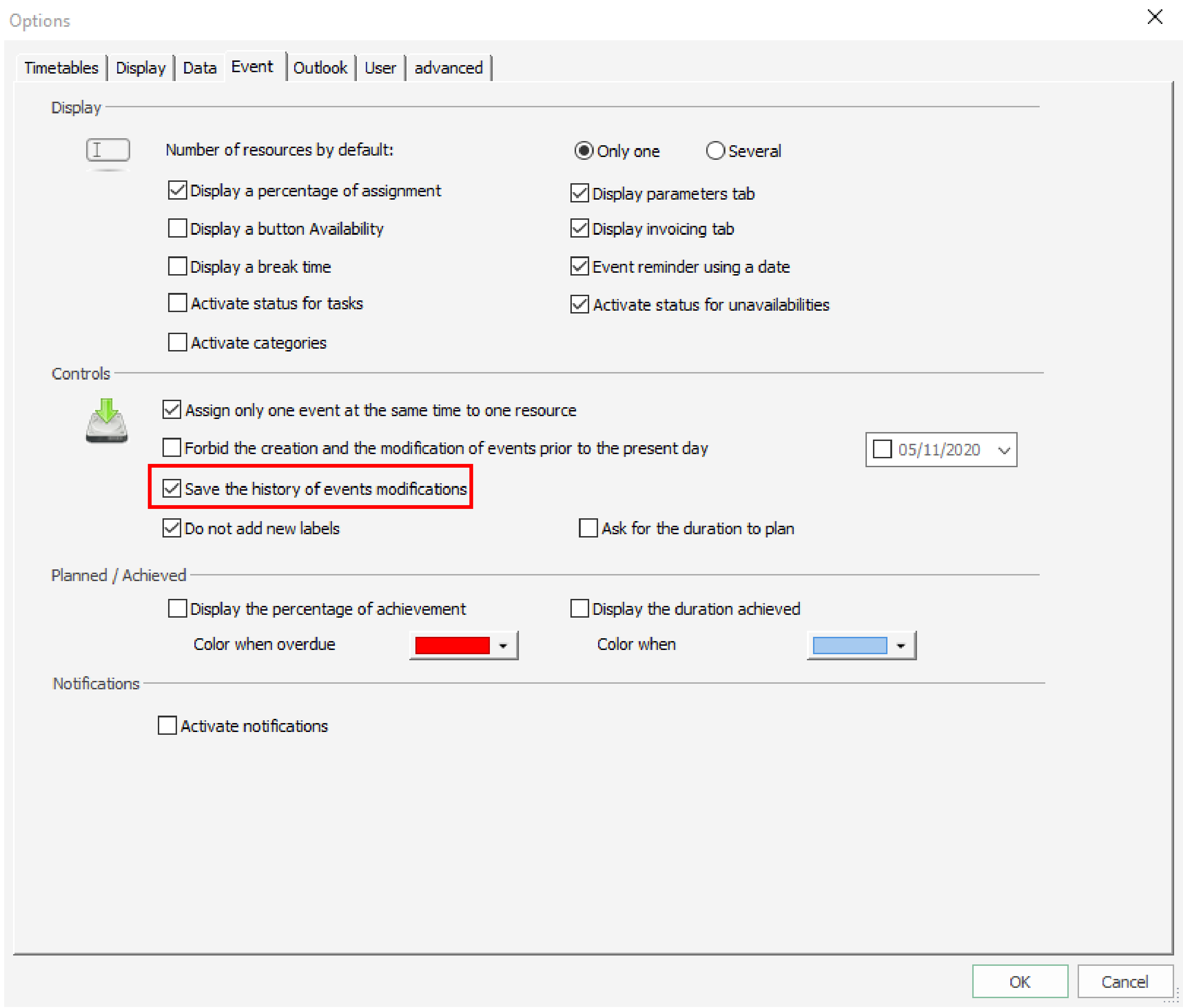

Then, your modifications will be applied.

## History / Tracking

You will know who created the event and all events modifications and even deletions

### Activation and creation of the new menu “History”

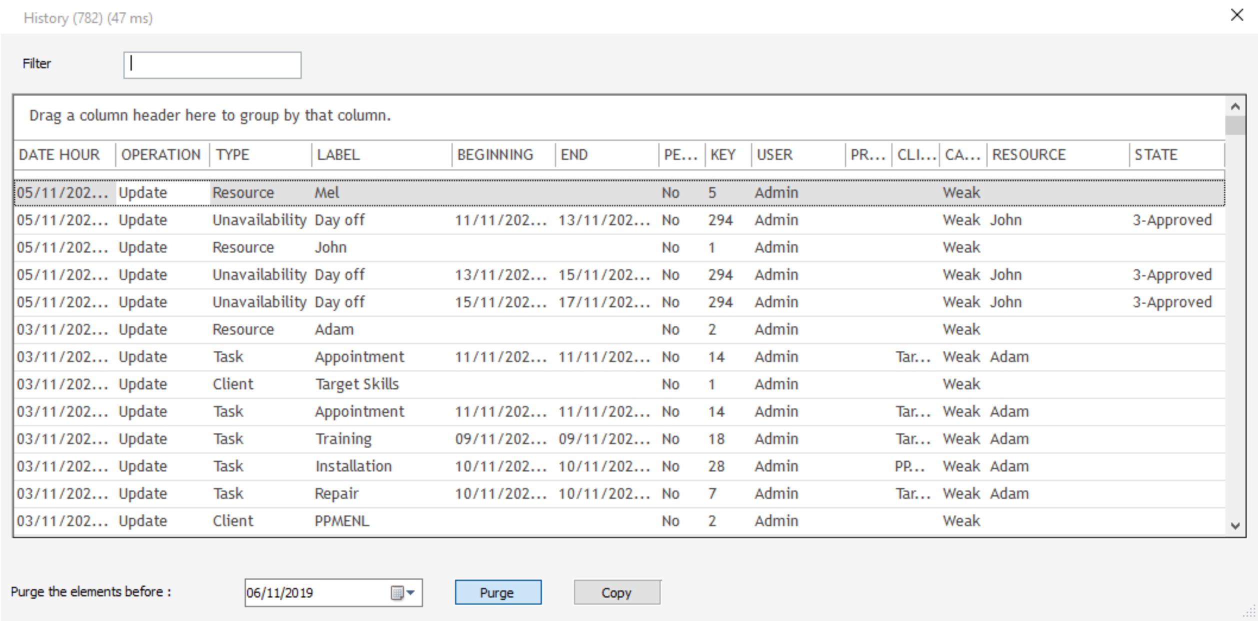
From the menu Tools -> Options -> Event activate the option “Save the history of events modifications”:




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



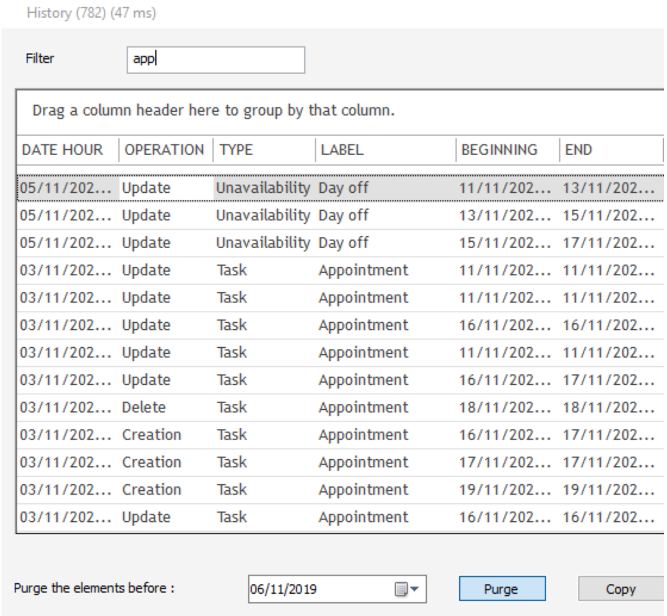

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END | PE... | KEY | USER | PR... | CLI... | CA... | RESOURCE | STATE |
|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| 05/11/202... | Update | Resource | Mel | | | No | 5 | Admin | | | Weak | | |
| 05/11/202... | Update | Unavailability | 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 | | PP... | 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 | | |

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.



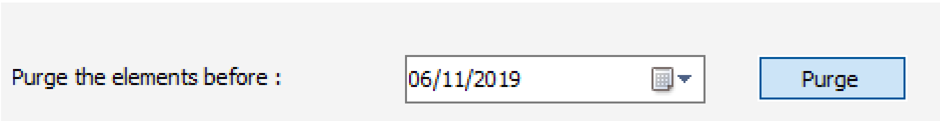

| DATE HOUR | OPERATION | TYPE | LABEL | BEGINNING | END |
|---|---|---|---|---|---|
| 05/11/202… | Update | Unavailability | Day off | 11/11/202… | 13/11/202… |
| 05/11/202… | Update | Unavailability | Day off | 13/11/202… | 15/11/202… |
| 05/11/202… | Update | Unavailability | Day off | 15/11/202… | 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… |

### Order the list chronologically:

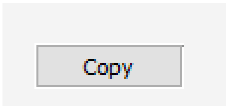
Click on the top of each column to order the list as you want.

### 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




### Copy the list:

Copy / paste the results to an external file like Excel via a button 

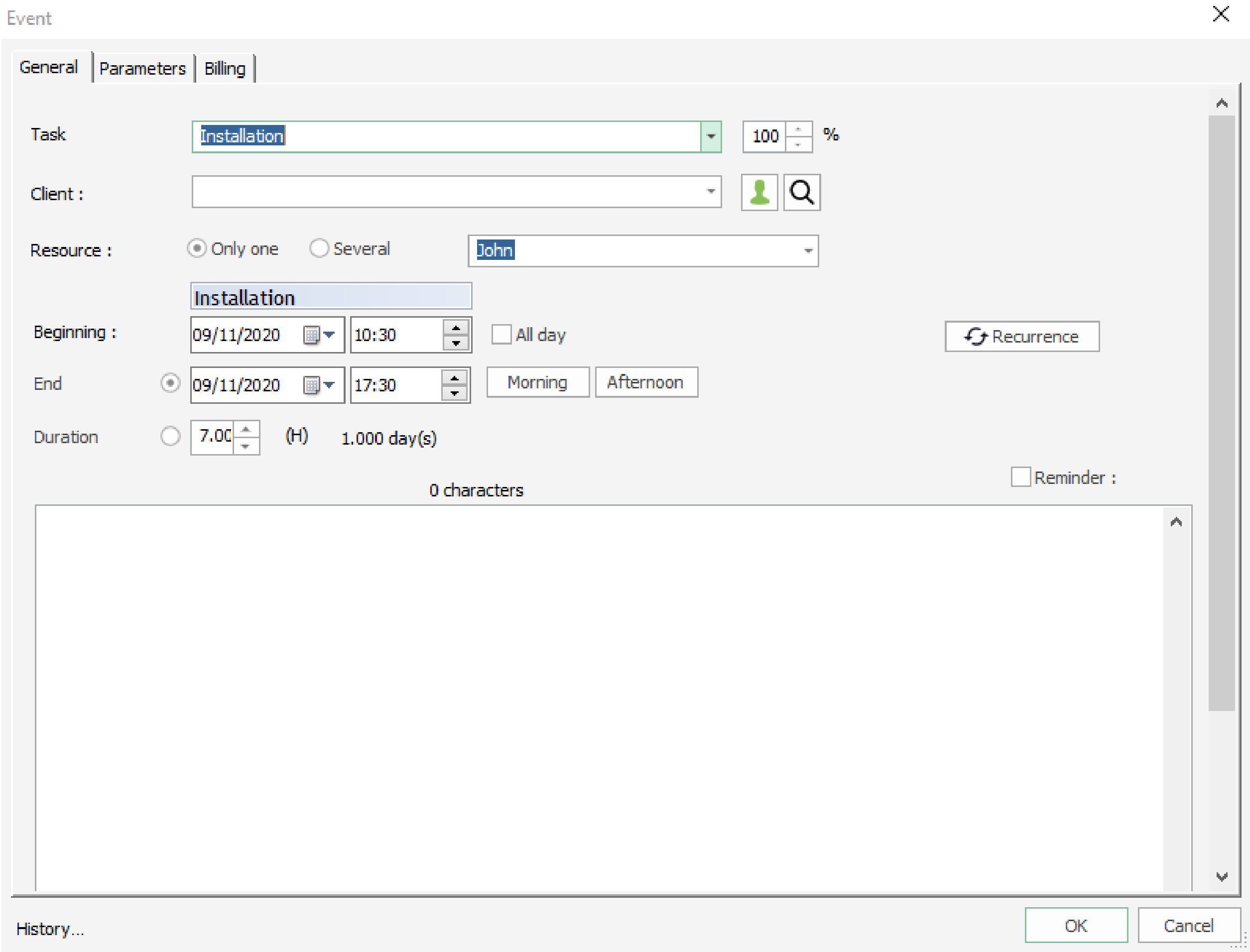

### Users rights permissions

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.

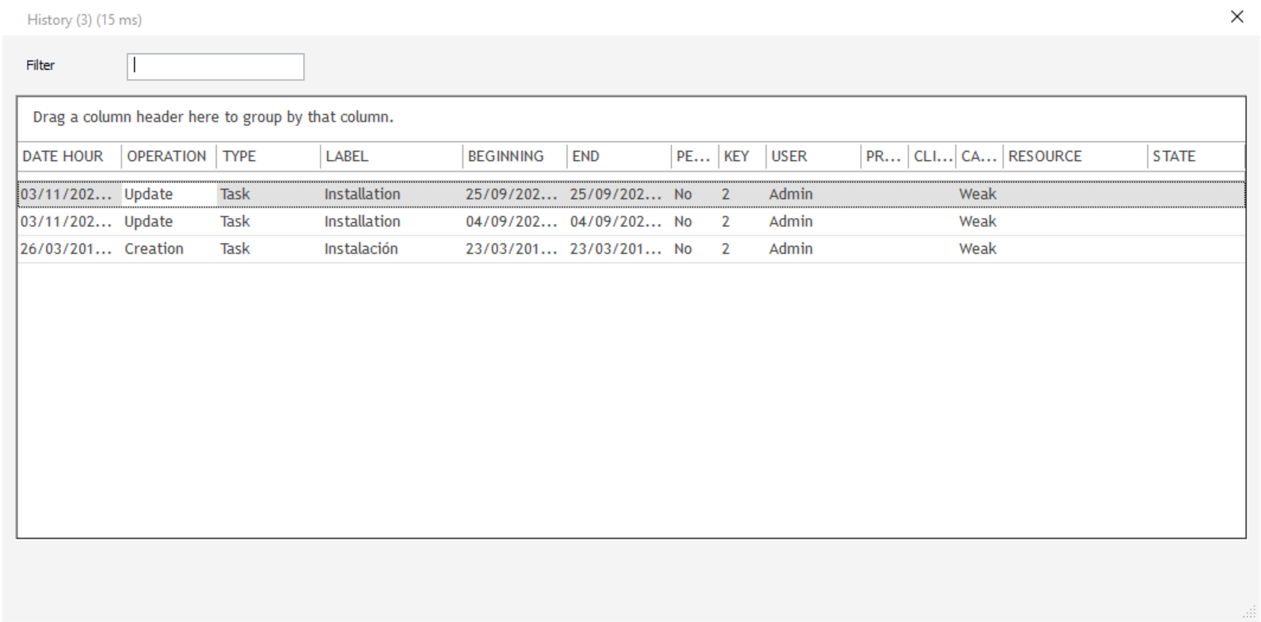
## Data tracked

### 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”.

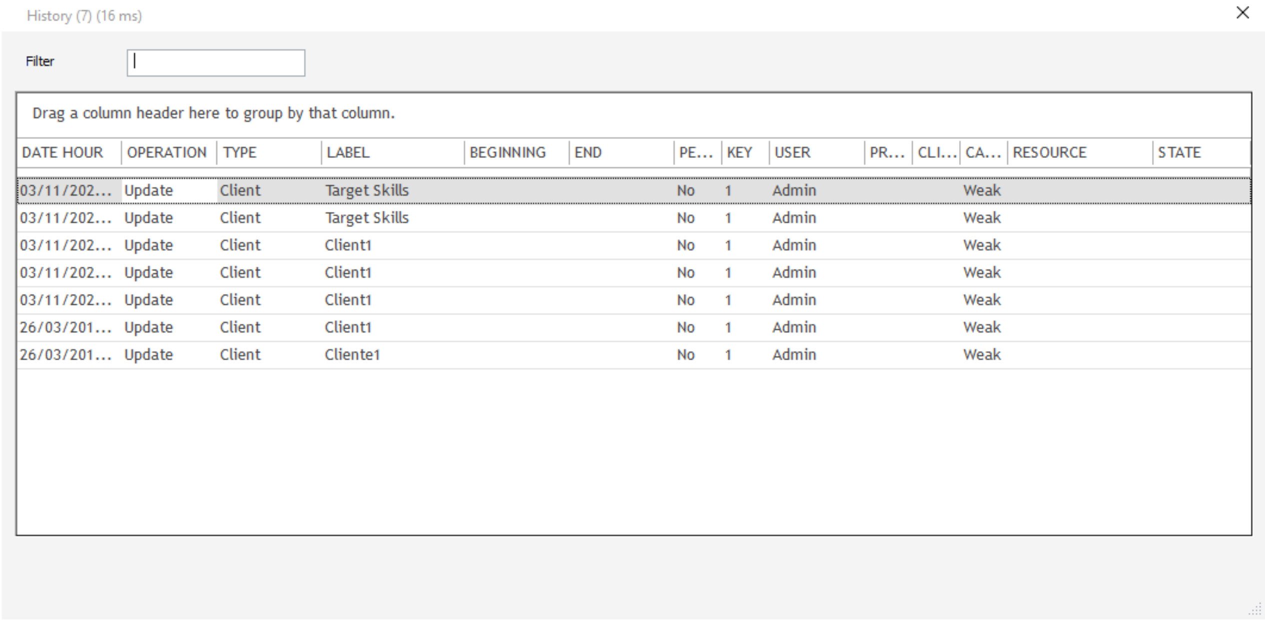



Then, details on this event will show:




## 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 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.

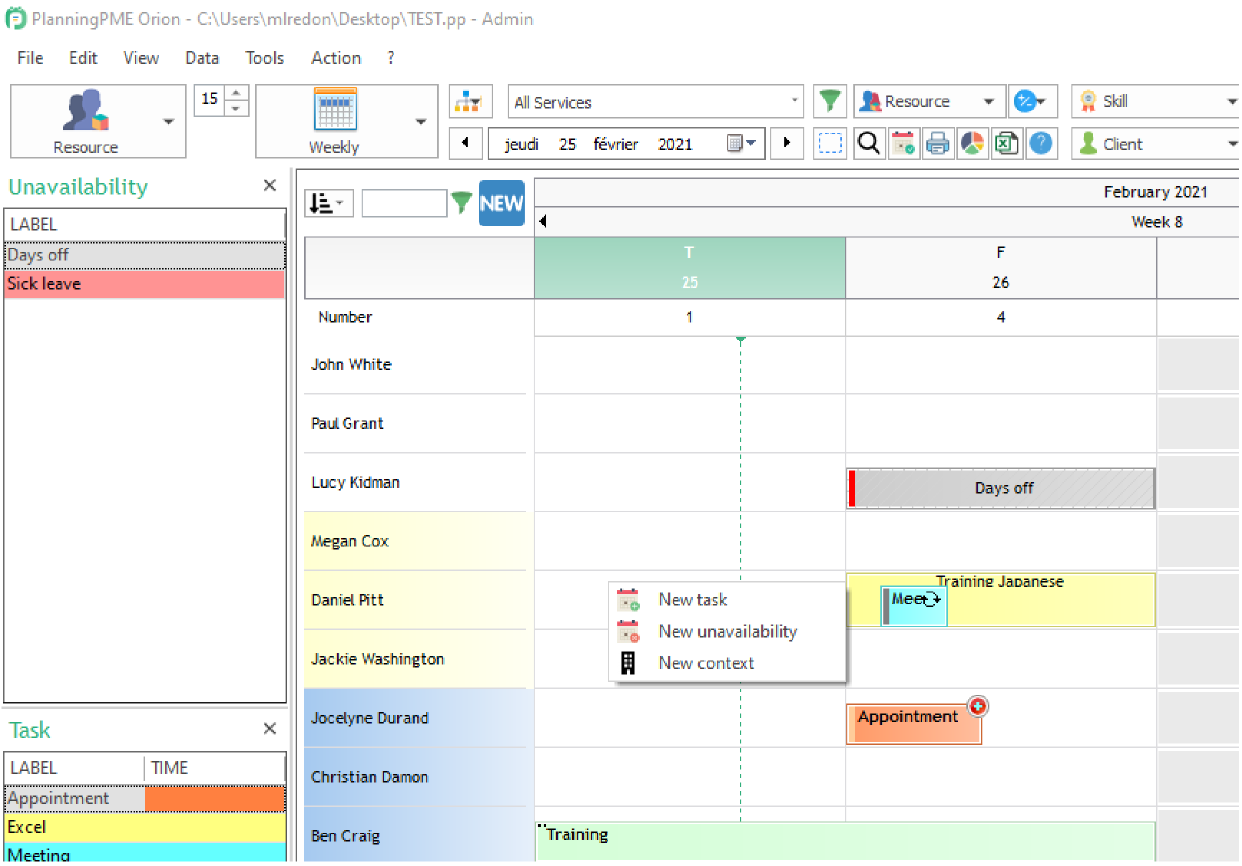
### History of a project

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.



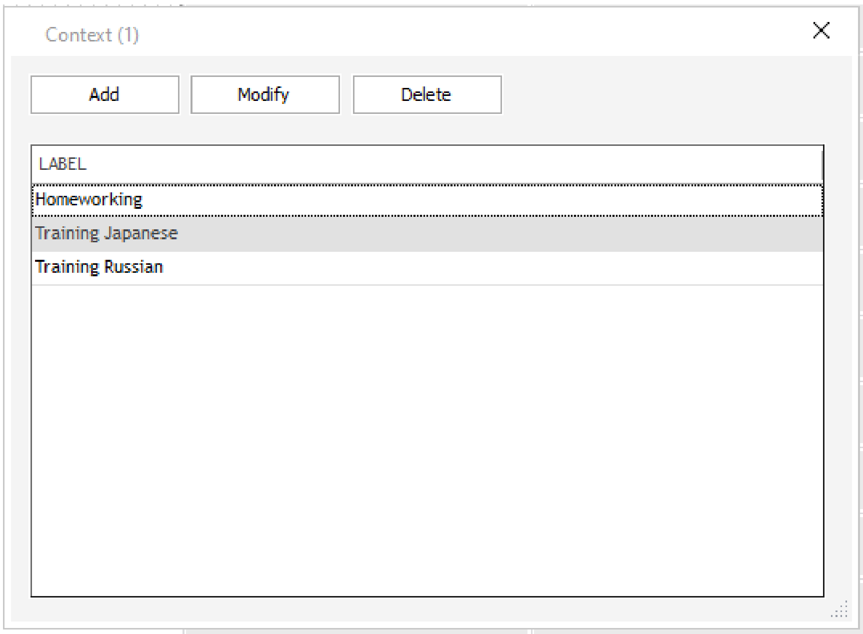

### Activate contexts

First, activate the option from the menu Tools -> Options -> Data and select "Activate as".

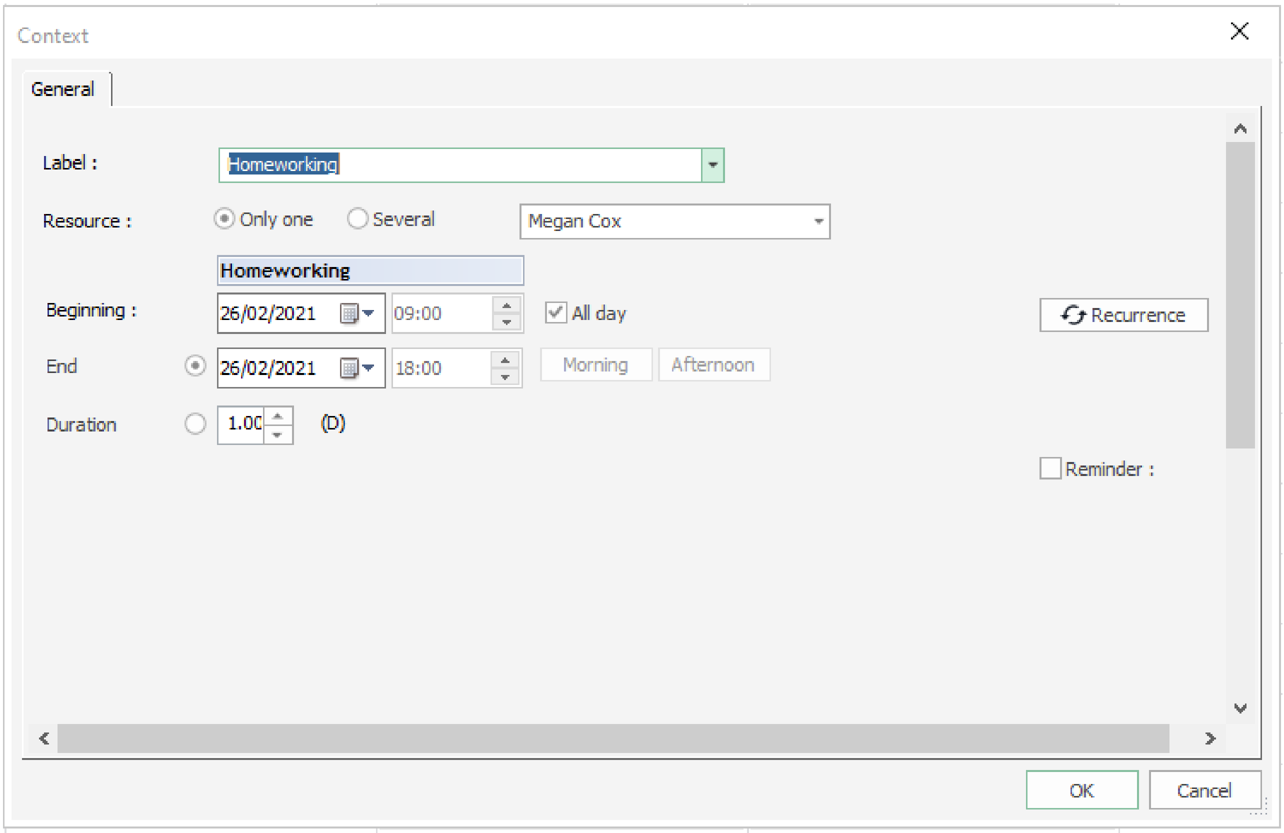

You now have a menu "Context" under "Data".

### Add, modify or delete the list of contexts

To define a new context, press the button "Add".



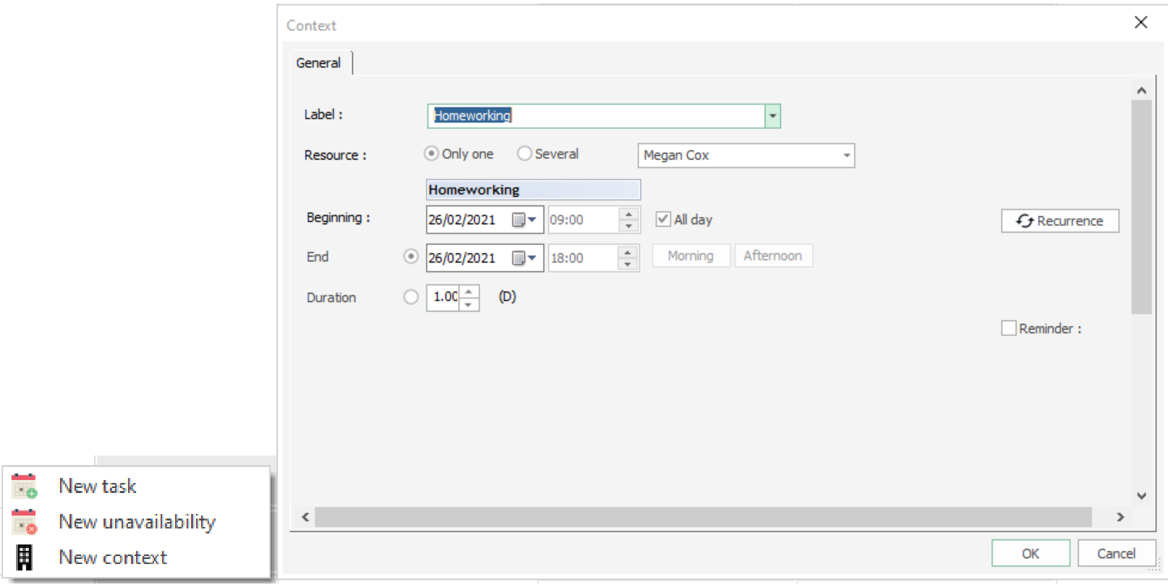

You can then type a label for example "Hospital Chocolate" and define if this new context will be available for all departments or only some of them. So, on the planning, if you have writing rights on one department only, then only contextss defined for this department will be available while creating a new "context" on the planning board.




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".

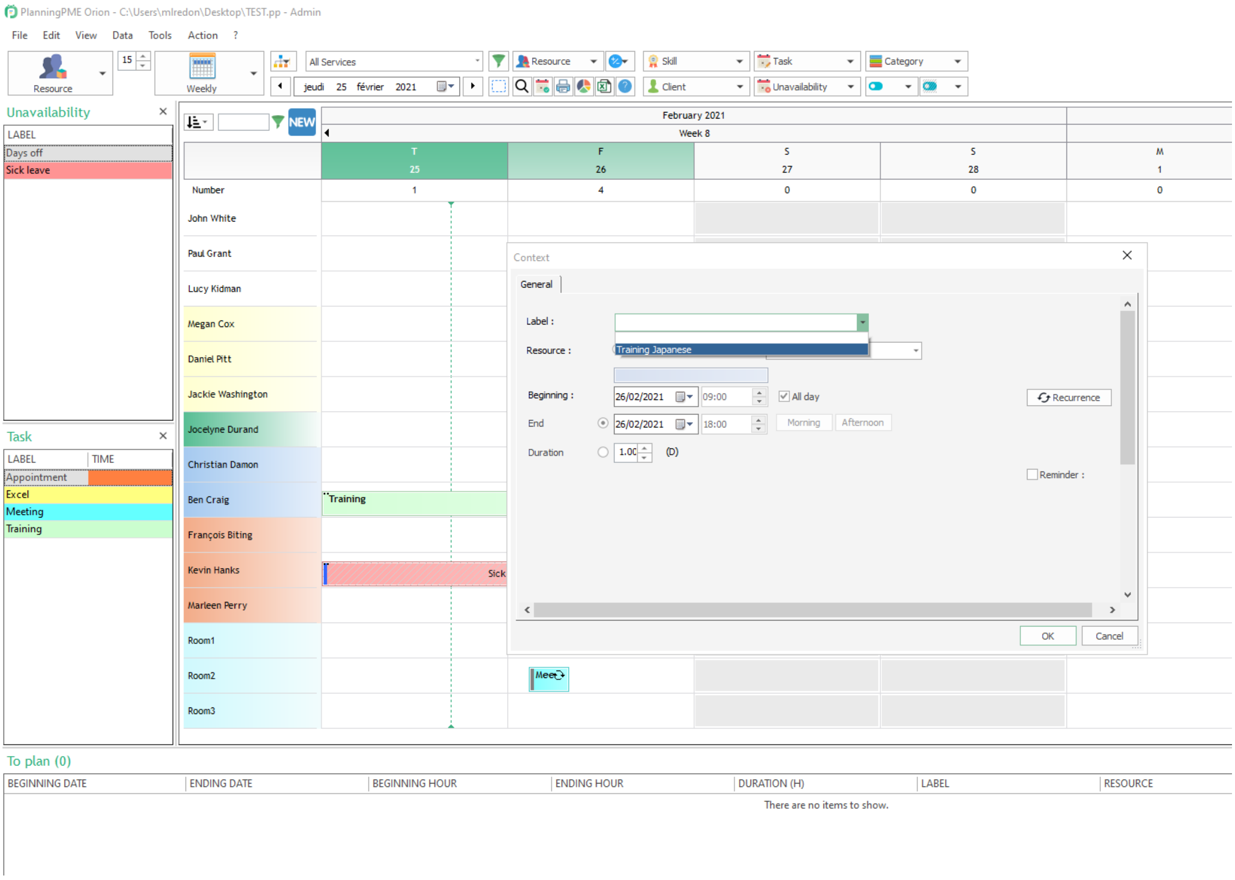



The "Context" window will then open. You can select a label on the drop down list or type directly a new label here. If you type a new label, it will be recorded on the menu Data -> Context.
Then, you can define beginning and end dates and time and even create a recurrent event if needed.
You can now 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.

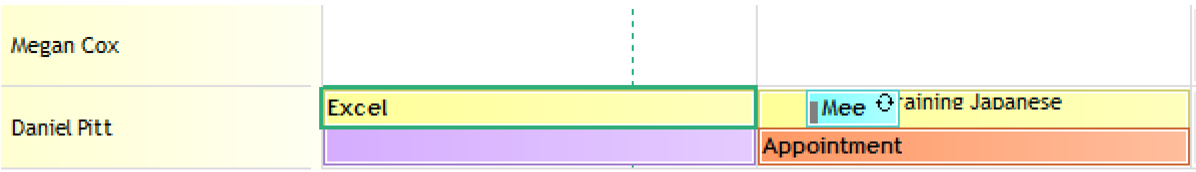


## Intuitive typing

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.

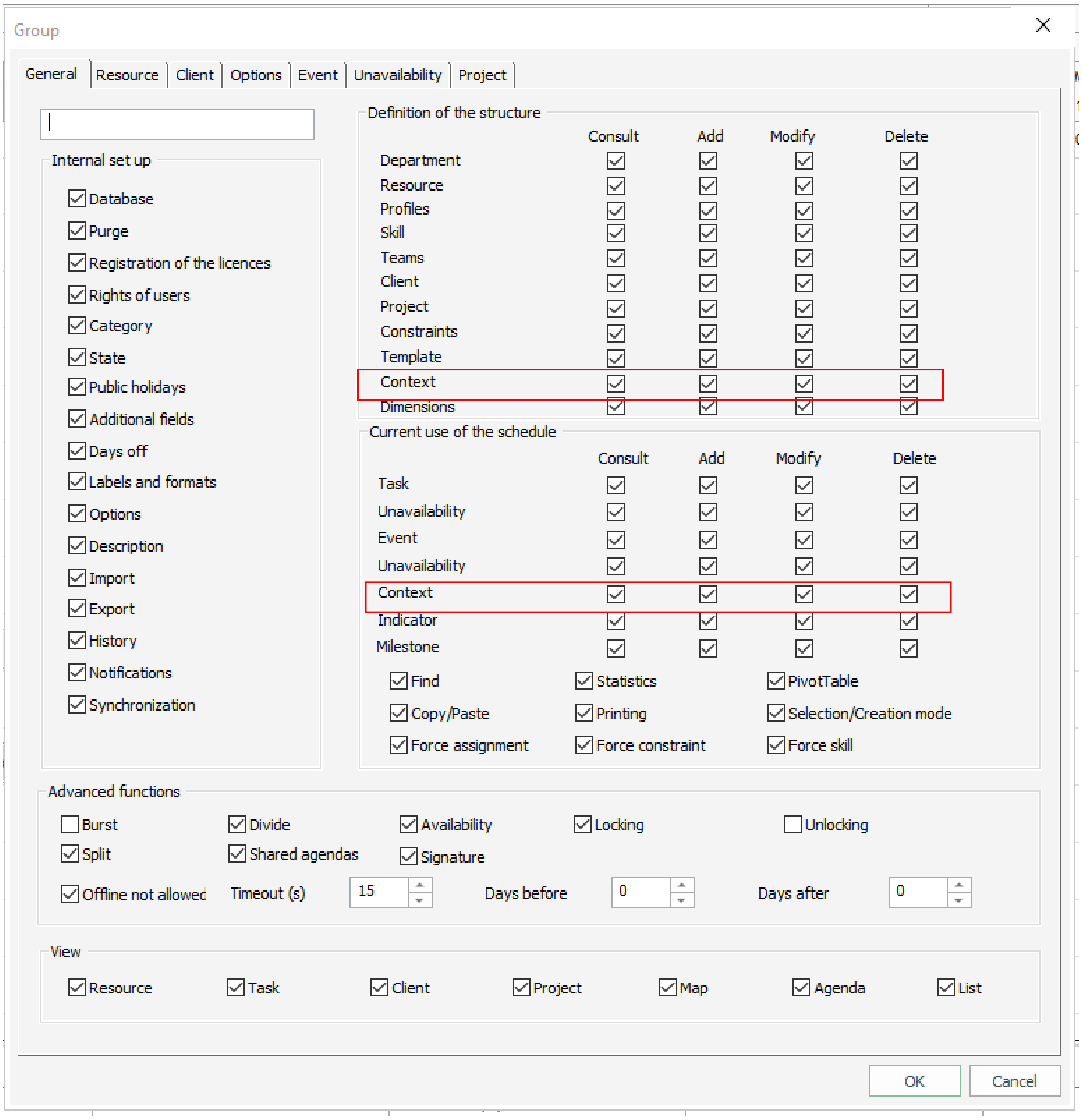
## Create some events and appointments within a context

You can then create some new appointments within this context drawing a box with your mouse.



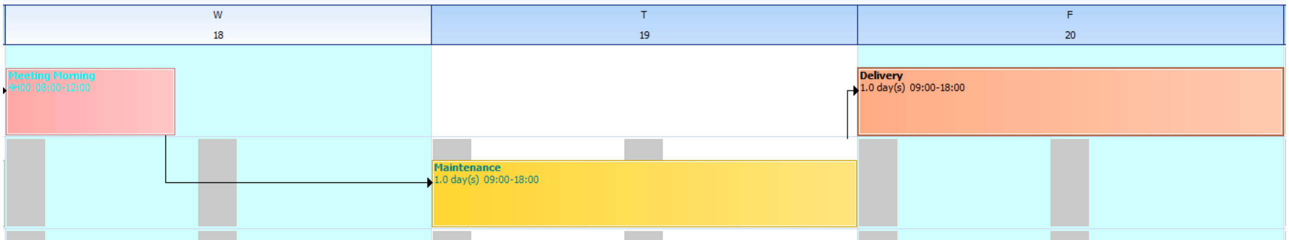

## Access rights to contexts defined per user

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
Resource
Profiles
Skill
Teams
Client
Project
Constraints
Template
Context
Dimensions
Current use of the schedule
Consult
Add
Modify
Delete
Task
Unavailability
Event
Unavailability
Context
Indicator
Milestone
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

# Events dependencies - Gantt chart

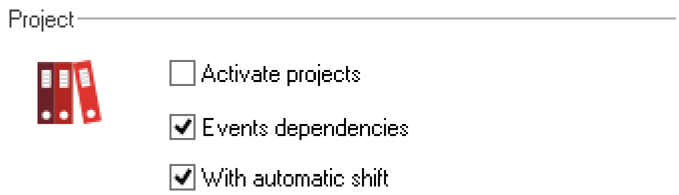
It is possible to manage events dependencies with PlanningPME and to precise a delay between each event.
Visualisation on the planning:




When an event is shifted on the planning, the following linked events are shifted as well.

## Activate this option

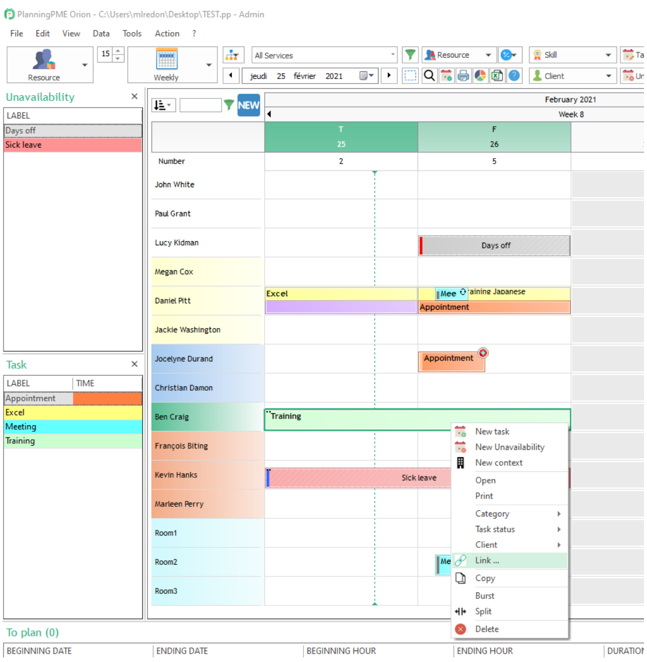
Option to activate in the menu Tools -> Options -> Event and select “Events dependencies”.



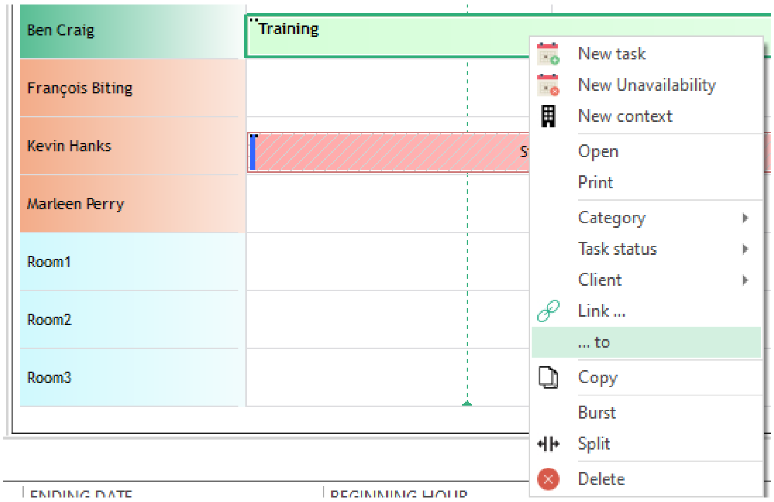

## Add, modify, delete a link

### Create a link

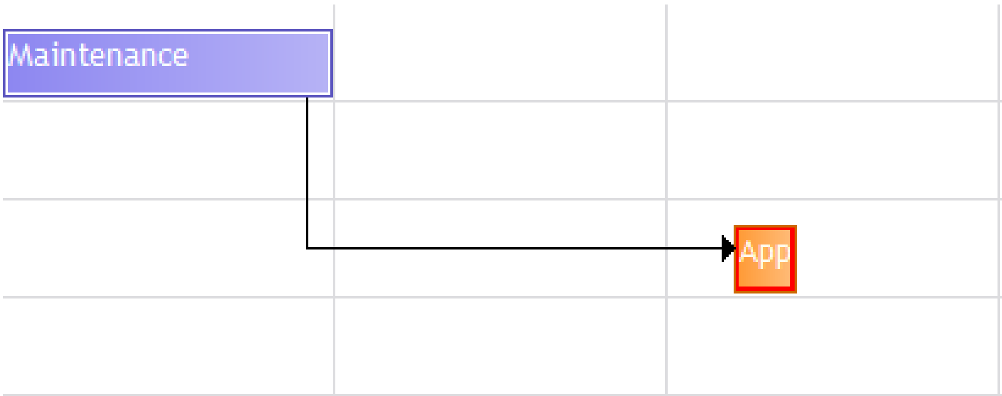
-> Right click on the events
Go to the first event, right click, select Link



Then, go to the second event and select …to



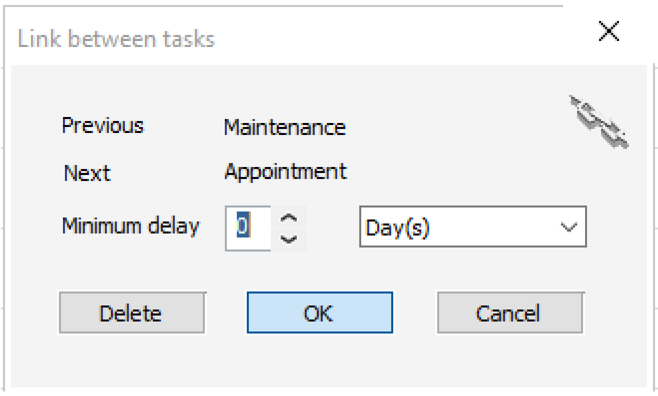

*Results:*



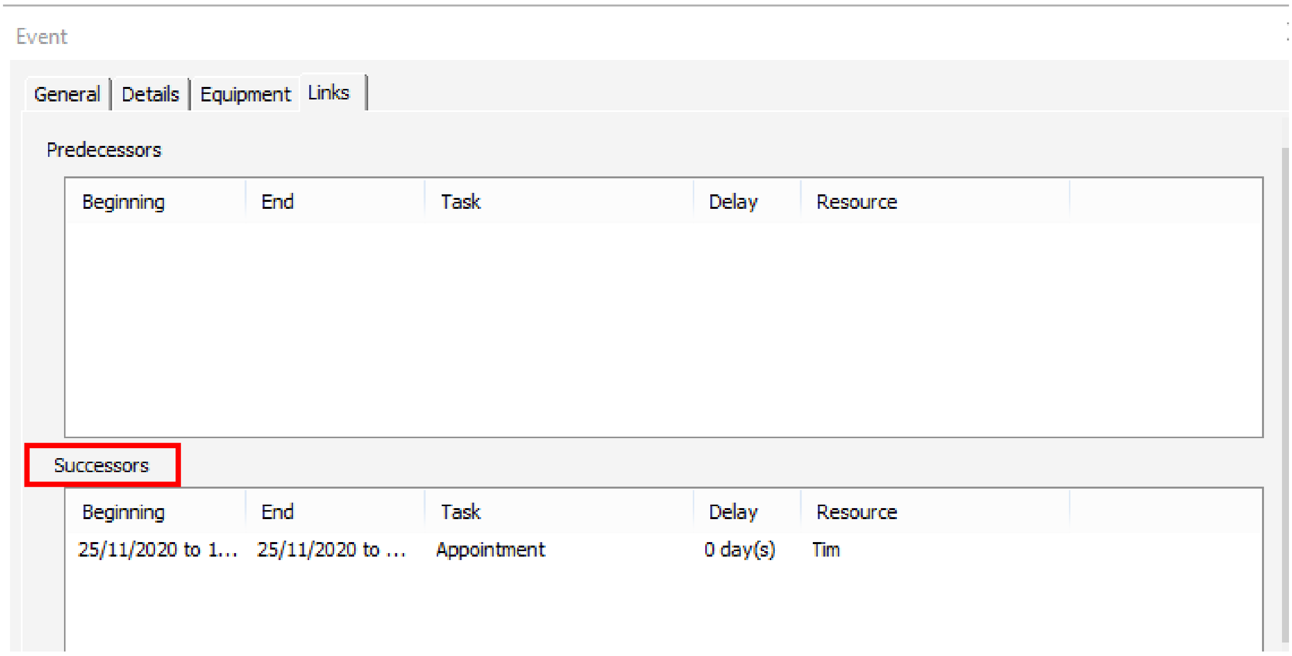

The black arrow shows that the events are linked.

## Delete a link

Click on the arrow directly and select delete:

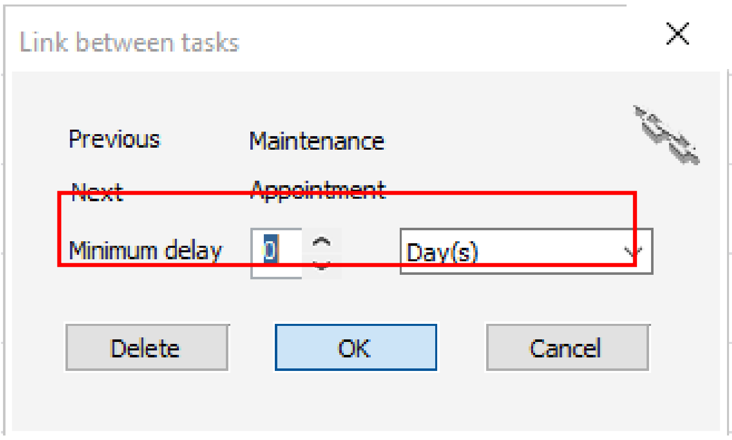



You can also remove a link easily in PlanningPME from the "Successors" window of the event:

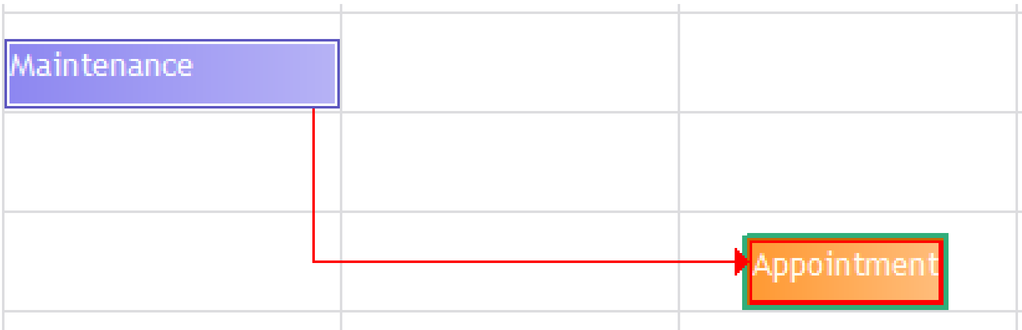



## Define a delay between the events

You can also precise a delay between two events clicking on the arrow. This windows appears:

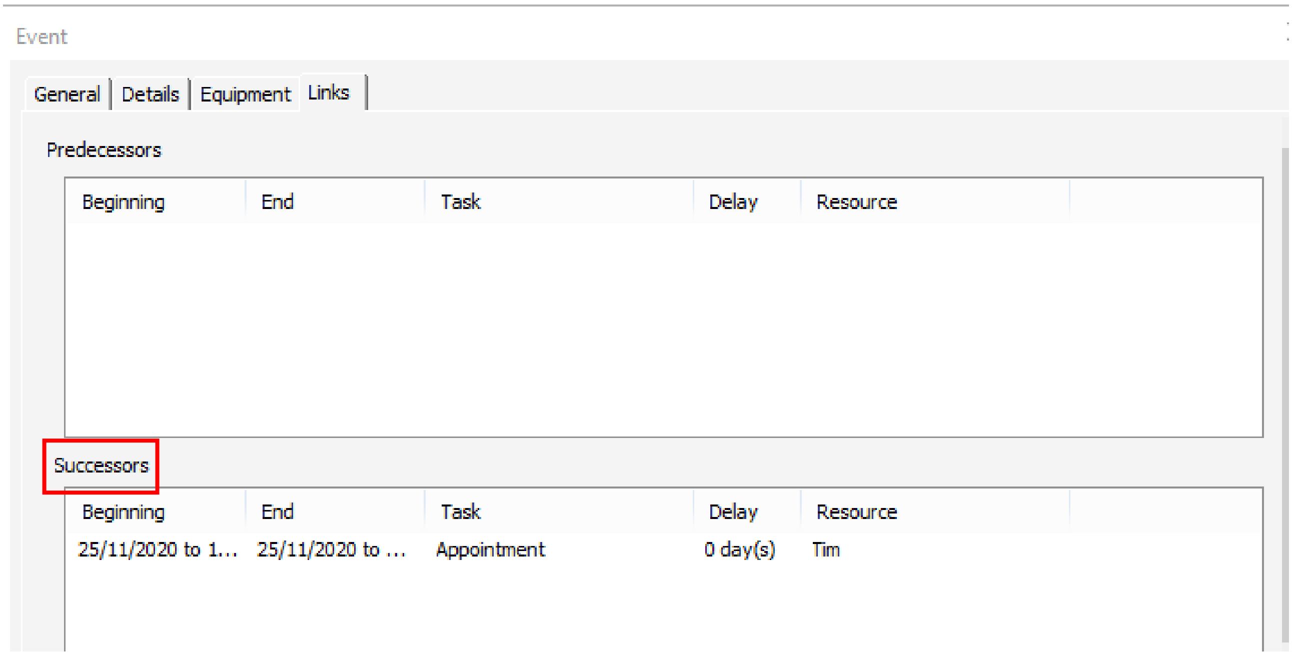



When a delay is specified, the arrow colour changes from black to red.




## Visualize the direct successors of an event

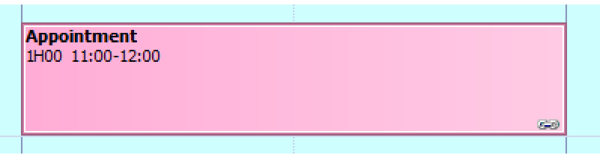
When you open an event, you now have a tab "Successors" that show you all the direct successors of an event:




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:

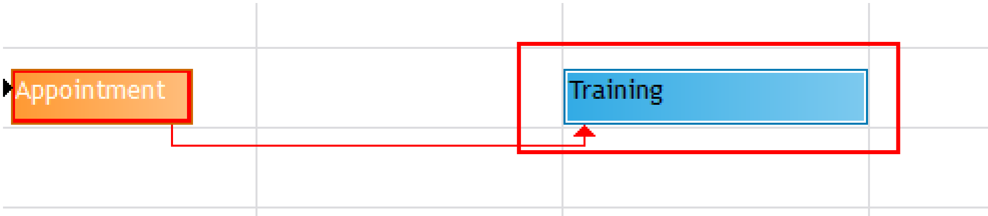



## Shift events on the planning board

### Rules while shifting an event

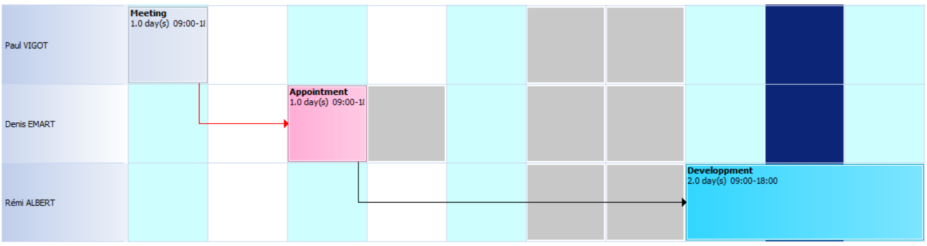
1 -> While shifting an event in the future, previous events are not shifted. Only successive events are shifted.
2 -> While shifting an event in the past, previous and next events are not shifted. If you shift an event in the past and you do not respect the delay specified with the previous event, the 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.

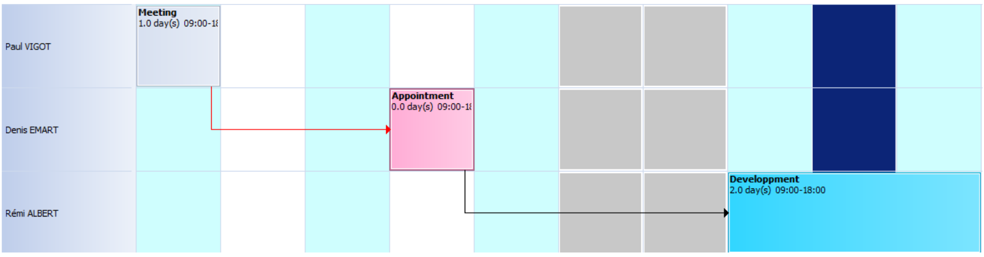
*Example:*




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**



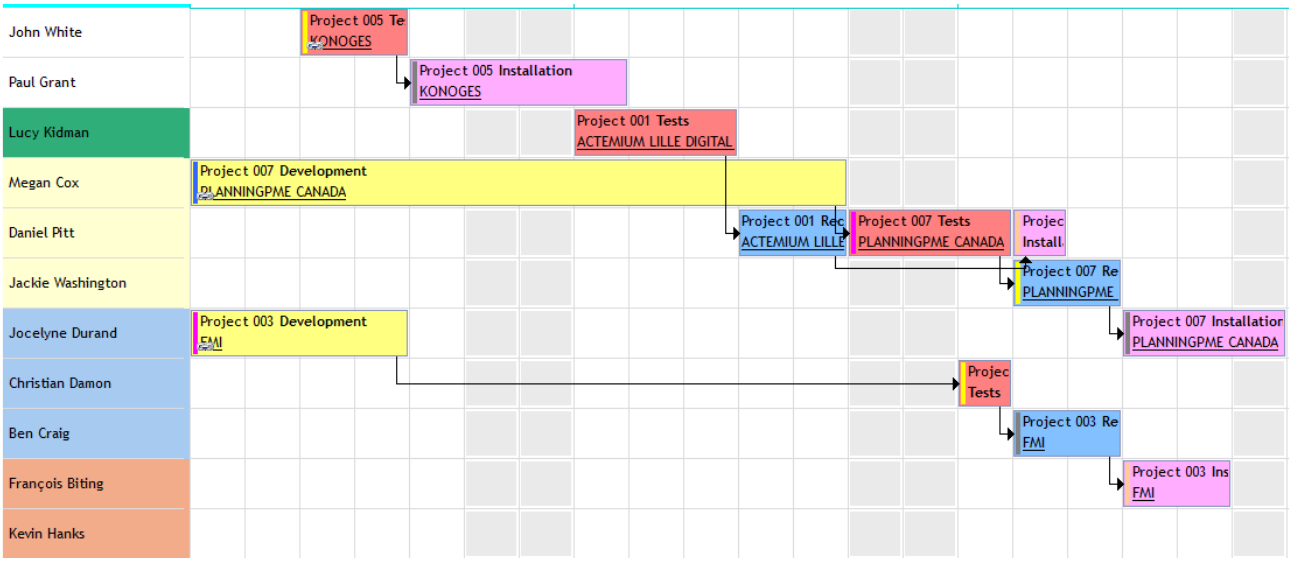

On the example above, when we shift the green event:

- 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

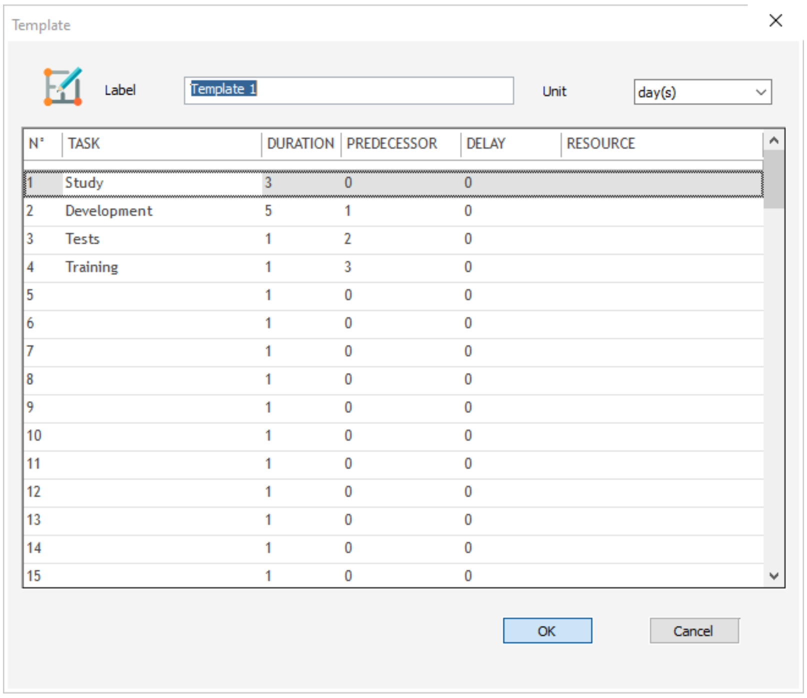
An events template is a list of events with different durations and linked information like delay between events.




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.

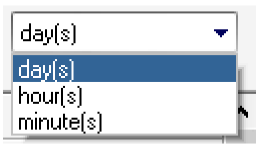
## Create a new template

Go to the menu Data -> Templates and click on "Add".




**Label:** Give a name to your template

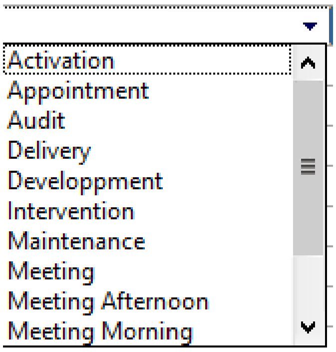
**Unit:** Select the unit for your events: Minutes, hours or days




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”



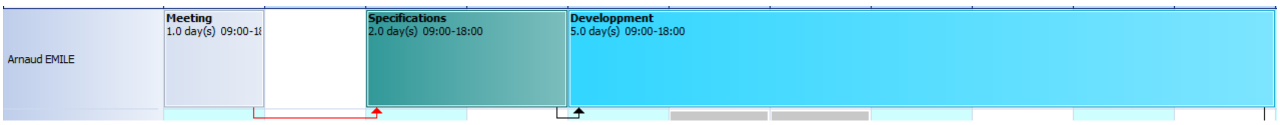

**Duration:** Specify the duration for each task

**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 | |

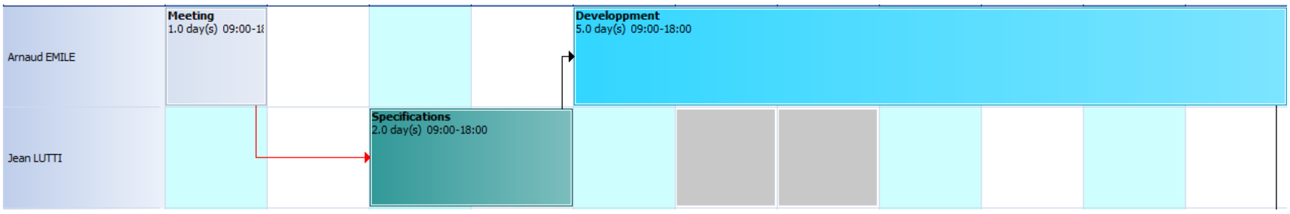
**Delay:** Delay between this event and its predecessor. This field is not mandatory. When you specify a delay, it appears in red on the planning board. In the example below, the task “programming” is linked to the task “Analysis” and the delay is 2 days:

| 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 | Developpment | 5 | 2 | 0 | |




You then have this kind of events template:

Label: Specific Developpment    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 | Developpment | 5 | 2 | 0 | To Plan Developpment |
| 4 | Test developpment | 2 | 3 | 0 | To Plan Developpment |
| 5 | Delivery | 1 | 4 | 0 | To Plan |
| 6 | | 1 | 0 | 0 | |

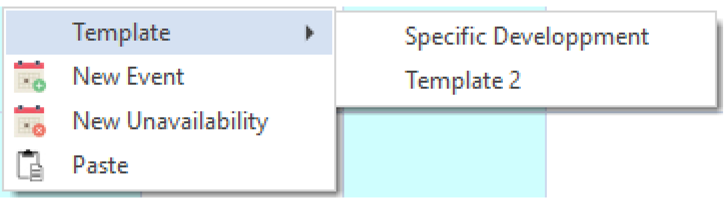
You can create as many templates as you want:
You can see the duration for each template that is the sum of the duration for all the events of one template.

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.

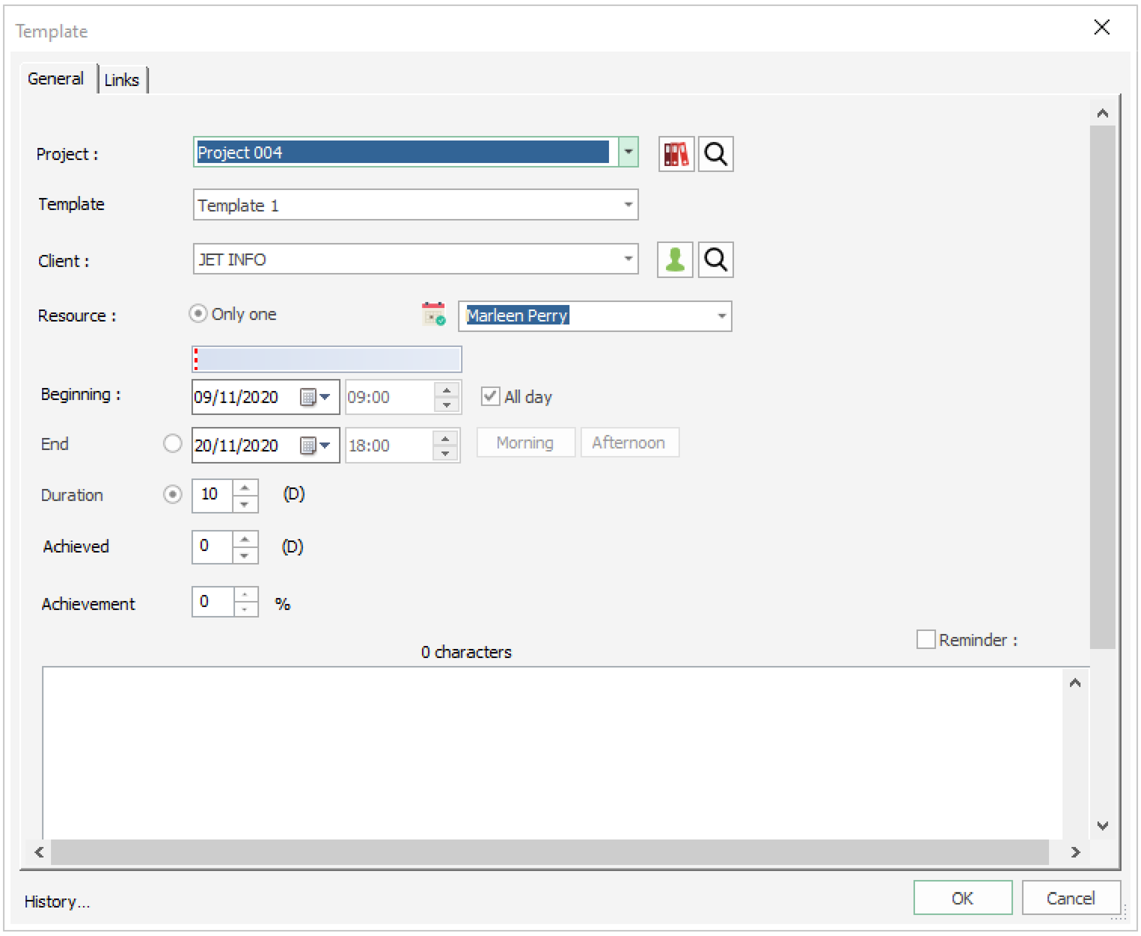
## Creation of a new "job" from a template

### 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.



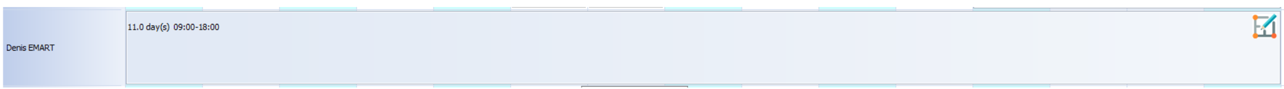

Then, this creation window appears:




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:



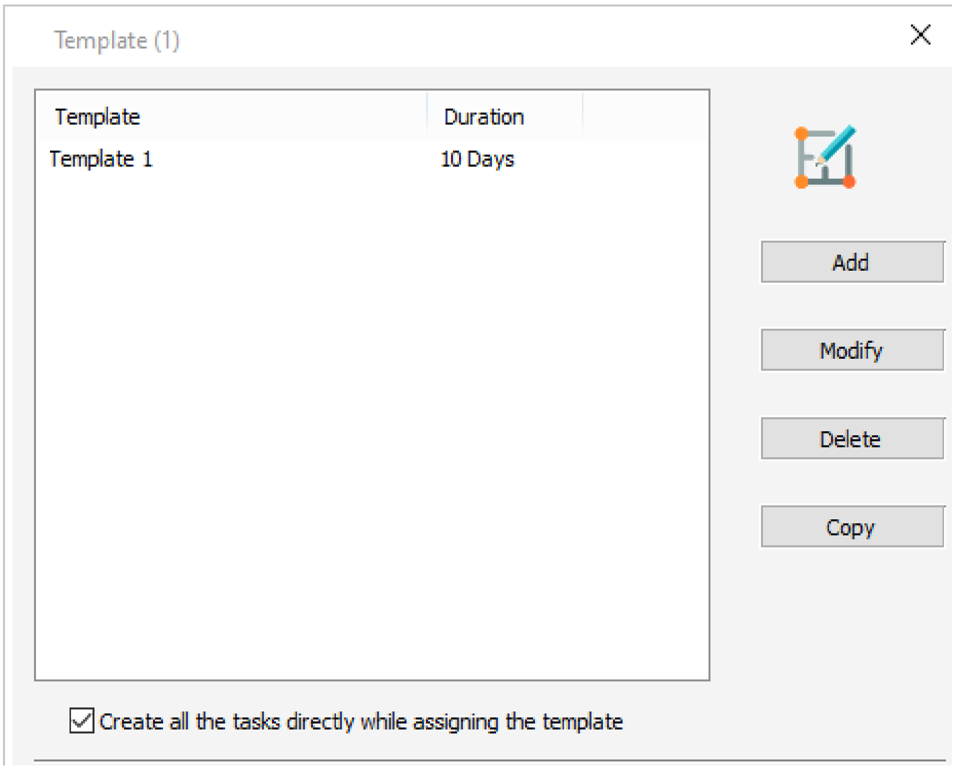

**Production**

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.

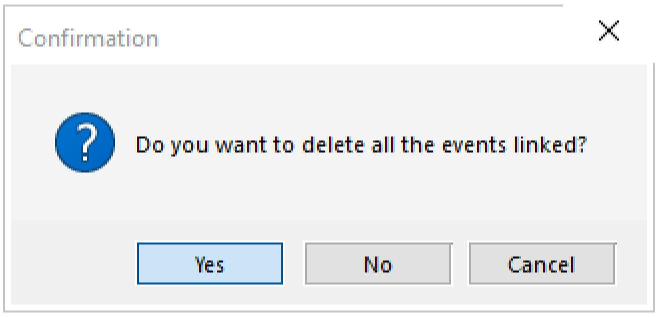
### Assign all events to one resource

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.

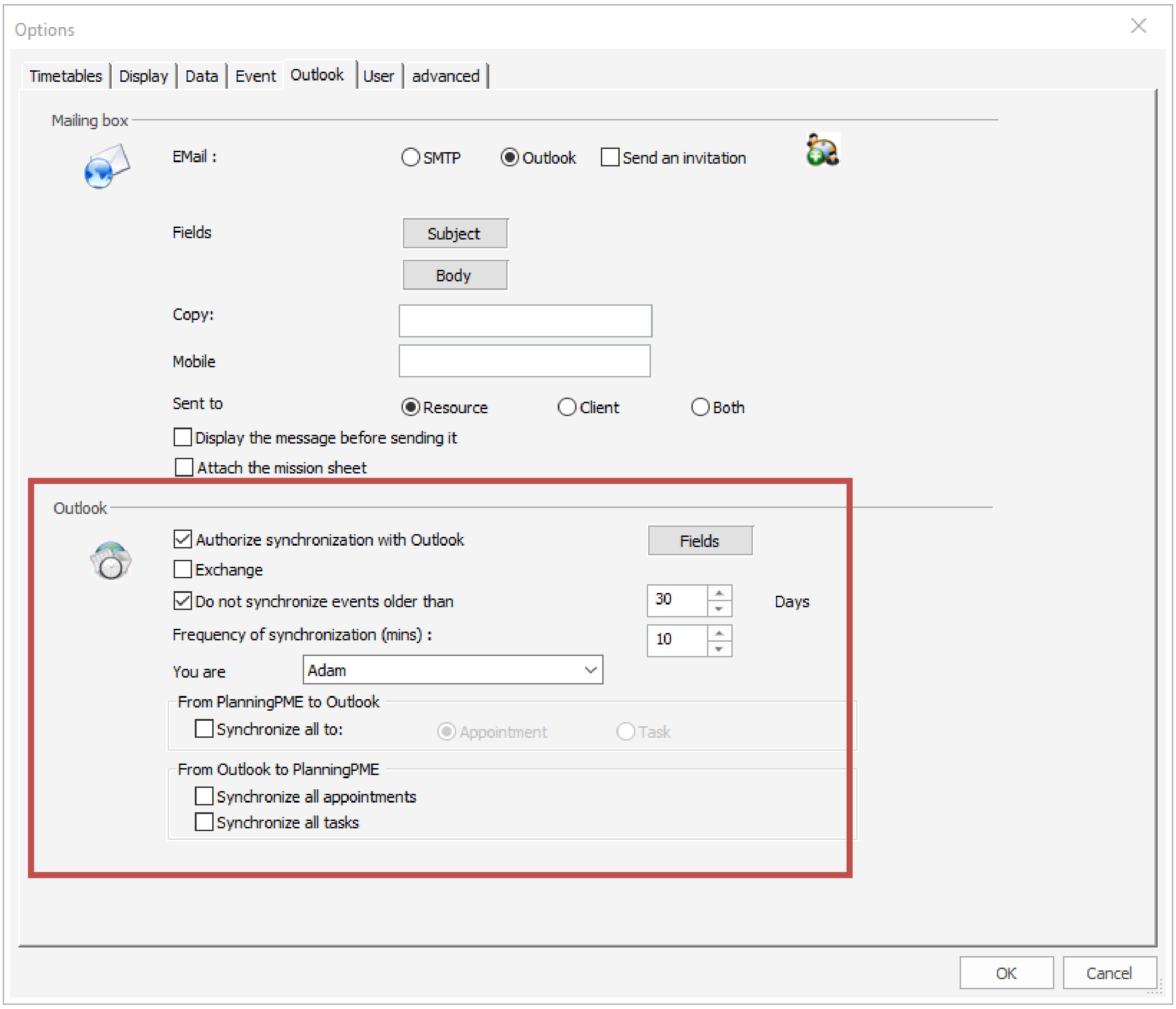
# Advanced IT functions

## 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.




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

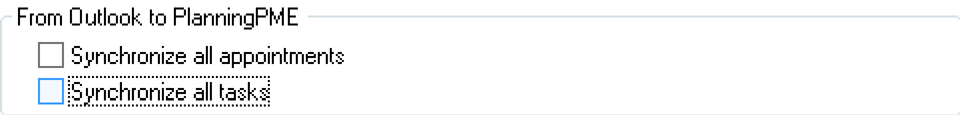
Precise who you are: Choose on the list of human resources your name. Events created for this resource selected will be synchronized to your Outlook.

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

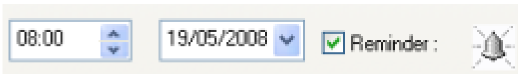



Careful: All your events and / appointments will be imported the first time you activate this option. Make sure you really want to activate this option.

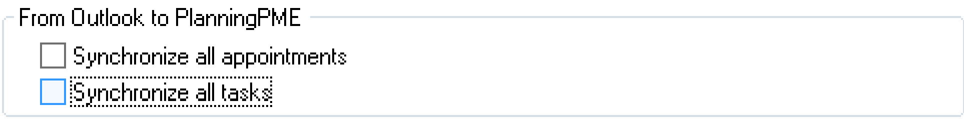
### Fields Synchronized

. 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:<br><br><br>**EXCEPT IF** the option “Event reminder using a date” is activated on the menu “Tools” -> “Options” -> Event<br><br><br>In that case, the reminder will not be synchronized. |

### Behaviour of the synchronization



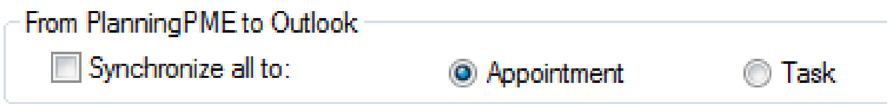

| Action in Outlook | Consequence in PlanningPME |
|---|---|
| Creation of an event in Outlook Calendar | Creation of an event if the option “Synchronize all appointments” is selected |
| Creation of an event in Outlook | Creation of an event if the option “Synchronize all events” is selected |
| Modification | 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

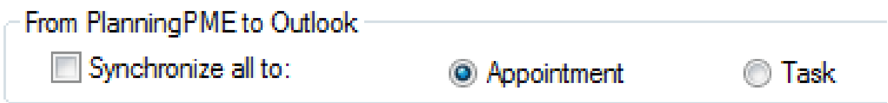
You can synchronize all events from PlanningPME to Outlook appointments or events.




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:




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.

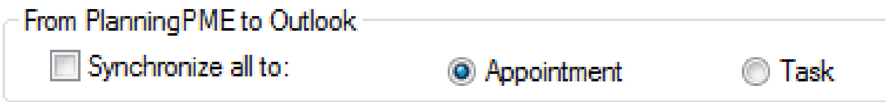
You can also decide to stop the synchronization event by event with a right click -> Outlook -> Stop the synchronization.

### Fields Synchronized

. NB: Only events are synchronized. Unavailabilities are not synchronized.
The reminder is also synchronised:

**NB:** If the option "Event reminder using a date" is activated, the reminder will not be synchronized in Outlook.

## Behaviour of the synchronization

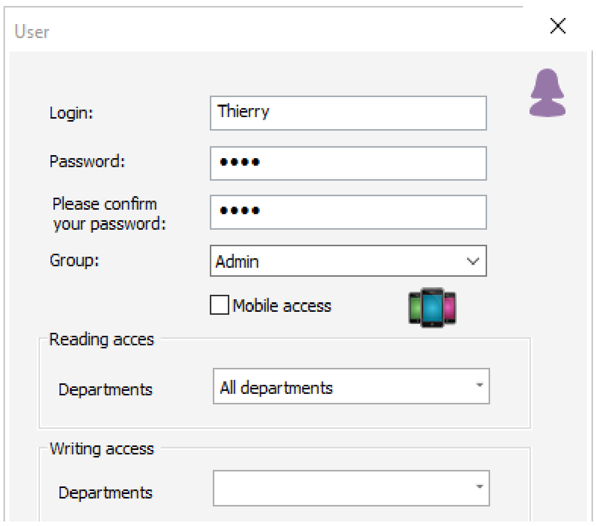



| Action in PlanningPME | Consequence in Outlook |
|---|---|
| Creation of an event | Creation of an event |
| Modification of an event | Modification |
| Deletion of a task | Deletion |
| Creation of an unavailability | Nothing created |
| Creation of a periodical event | Nothing created |
| Event gotten 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



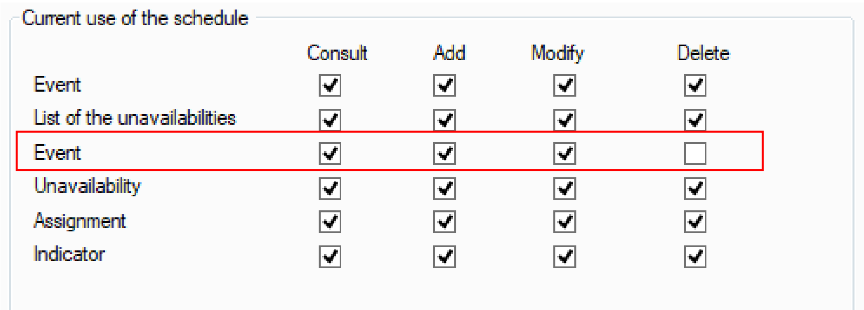

This user can visualize all departments but do not have writing access to the departments.
It means that he is not allowed to add, modify or delete anything on the schedule.

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**



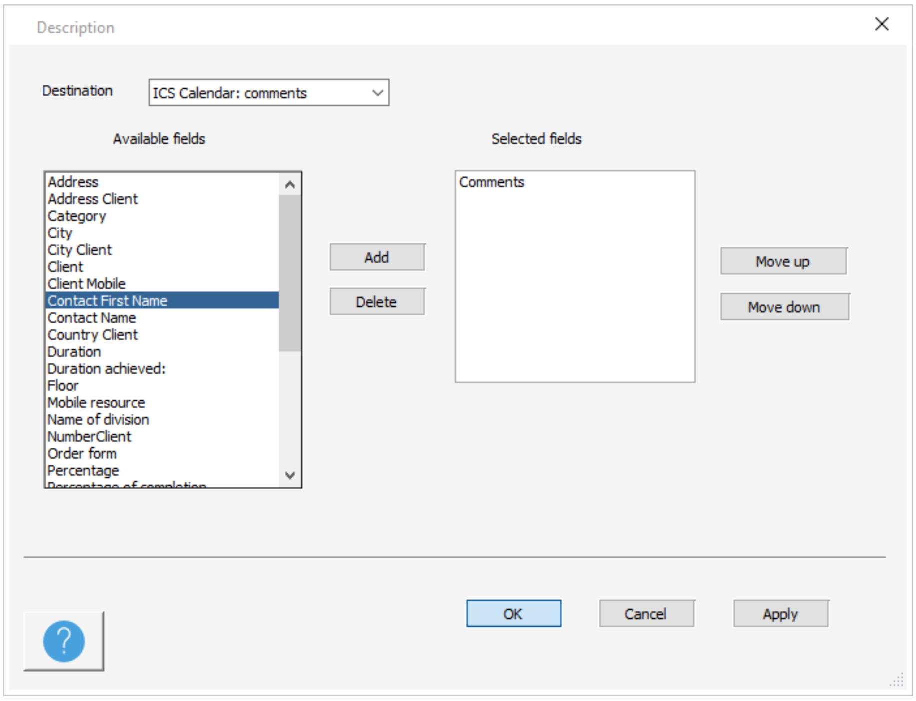

The rights selected for the Event (Add, Modify, Delete) will be applied while synchronizing.

## 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”.




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

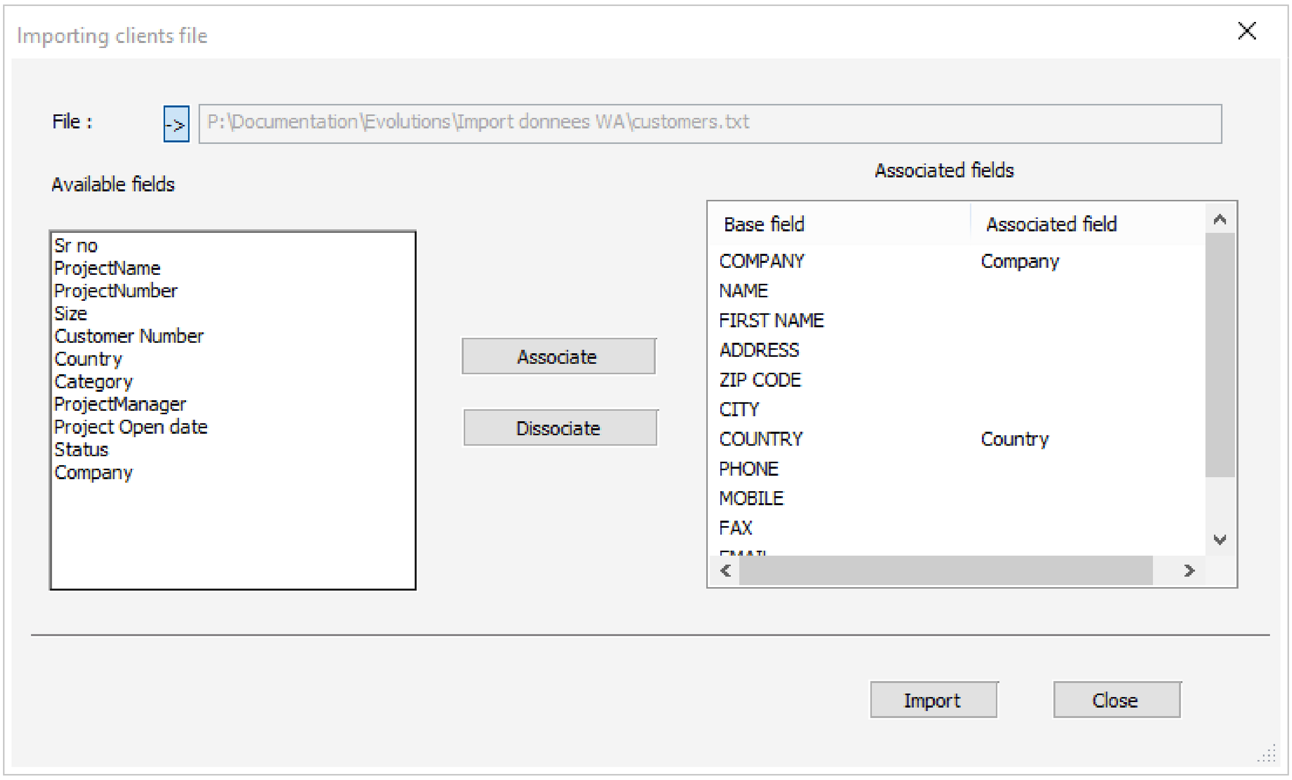
You can Import / Export data on clients, events and unavailabilities under special txt format from the menu File -> Import or Export.

### 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.




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:

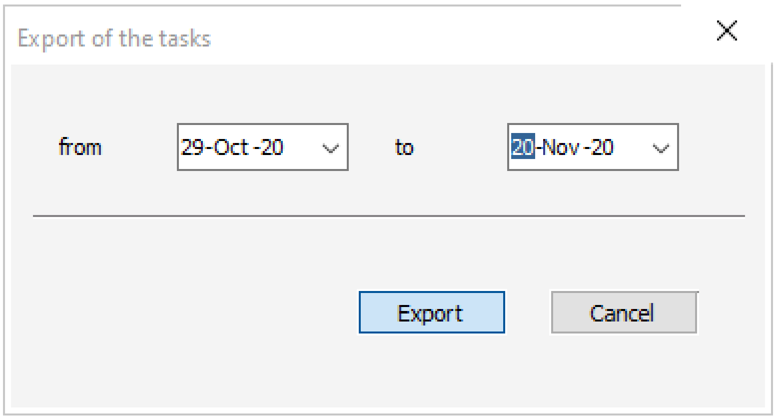
clients.txt - Bloc-notes

Fichier Edition Format 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.




Click on "Export" and save your text file.
The exported file looks like this text file:

task.txt - Bloc-notes

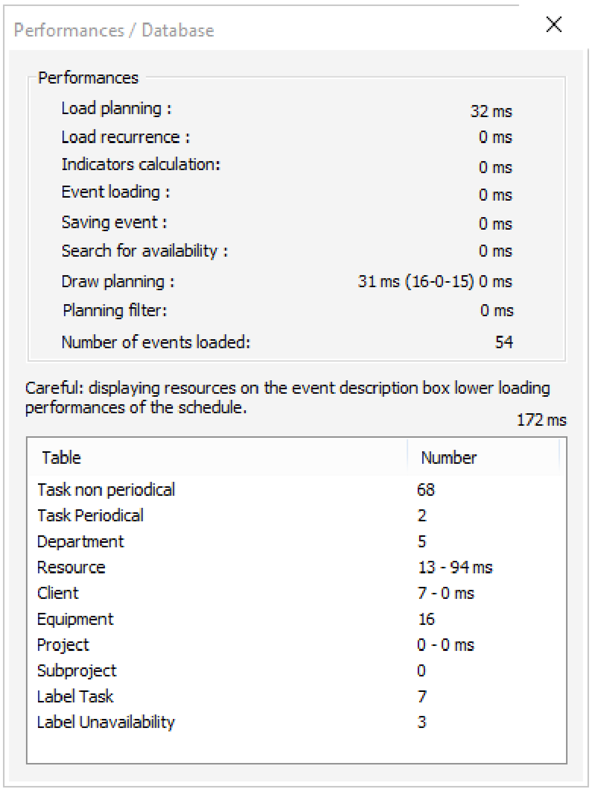
Fichier Edition Format Affichage ?

```
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	Developpment	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 developpment	30/03/2018	30/03/2018	Denis EMART
9	Appointment	30/03/2018 11:34	30/03/2018 13:34	Arnaud EMILE
10	Developpment	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.




It allows to have an idea of the performances of the database on loading, calculation, number of data.

## Improve performances

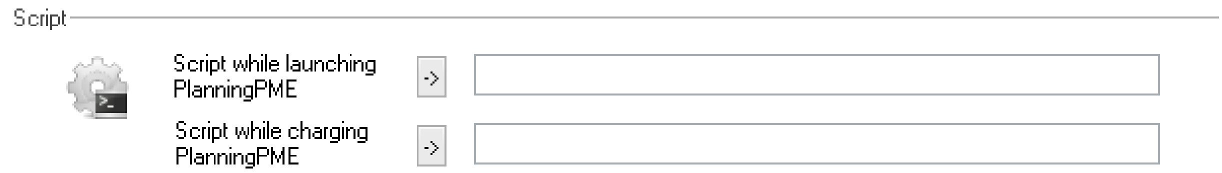
Also, to increase your planning performances, if not done yet, we highly advise you to migrate from MS Access to SQL Server database. Contact Target Skills for more information.

## 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.



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 O
raHome92};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.