Why VISUAL PLANNING ?

Control panel, Decision Support

VISUAL PLANNING gets its inspiration from wall chart schedules and uses these for its overall presentation and "manual" management of events.

But it is much more than this!

VISUAL PLANNING meets businesses' planning and operating management needs. It enables work groups to manage and monitor in real time, resources, teams, customers, etc. It therefore becomes the control panel for the activities of your business.

More than just a wall chart schedule or a personal productivity program, VISUAL PLANNING is a decision-making assistant with an exceptional combination of the following features:

Universality

VISUAL PLANNING can be totally customized. It has been chosen by several thousands of businesses from all sectors and all sizes.

You will be able to manage simultaneously, according to your needs, your teams, customers, projects, resources etc.

Ease of use on a daily basis

Its graphical interface displays an immediate visual summary of information. Its use of icons and drag & drop technology makes it intuitive and easy for anyone to use.

Despite its large number of functions, VISUAL PLANNING, once set up, is used for the most part by dragging icons with the mouse and occasionally displaying a new view by clicking in a list.

VISUAL PLANNING is used everyday by people with no IT experience.

Shared use

All users (local or remote) connected to a VISUAL PLANNING server can view or modify concurrently

the same shared planner.

The management features are used to set permissions and restrict the access of each user in the various planners, both in reading (confidentiality) and writing (security).

Decision-making assistance

Filters, defined according to your criteria, can be called via a simple mouse click: you can thus search for resources having the characteristics and availability necessary for a required task.

You can also assign numerical values to tasks according to your own criteria, then calculate in real time work costs, revenue and workload in order to monitor your budgets analyse the work load, the days off, etc.

The reporting and statistics functions enable you to display all sorts of pivot tables analyzing your activities, then print out and use these tables. Indicators (control totals) displayed on the planner, allow you to calculate instantly the consequences of your planning.

A planner for each resource is also available via a simple click: e.g. if you plan to assign staff to certain jobs, you can either view the staff planner or the progress of the jobs in hand. Links between events and constraints increase the power and security of using VISUAL PLANNING.

Several operating platforms

VISUAL PLANNING can be used on all versions of Windows XP or above, and all compatible networks as well as all LINUX platforms.

It connects directly to Access, SQL-Server, MySQL, Oracle, PostGreSQL databases.

The VISUAL PLANNING range of products includes a stand-alone version and a server version. The latter allows flexible shared use, in local or wide area networks.

Introduction

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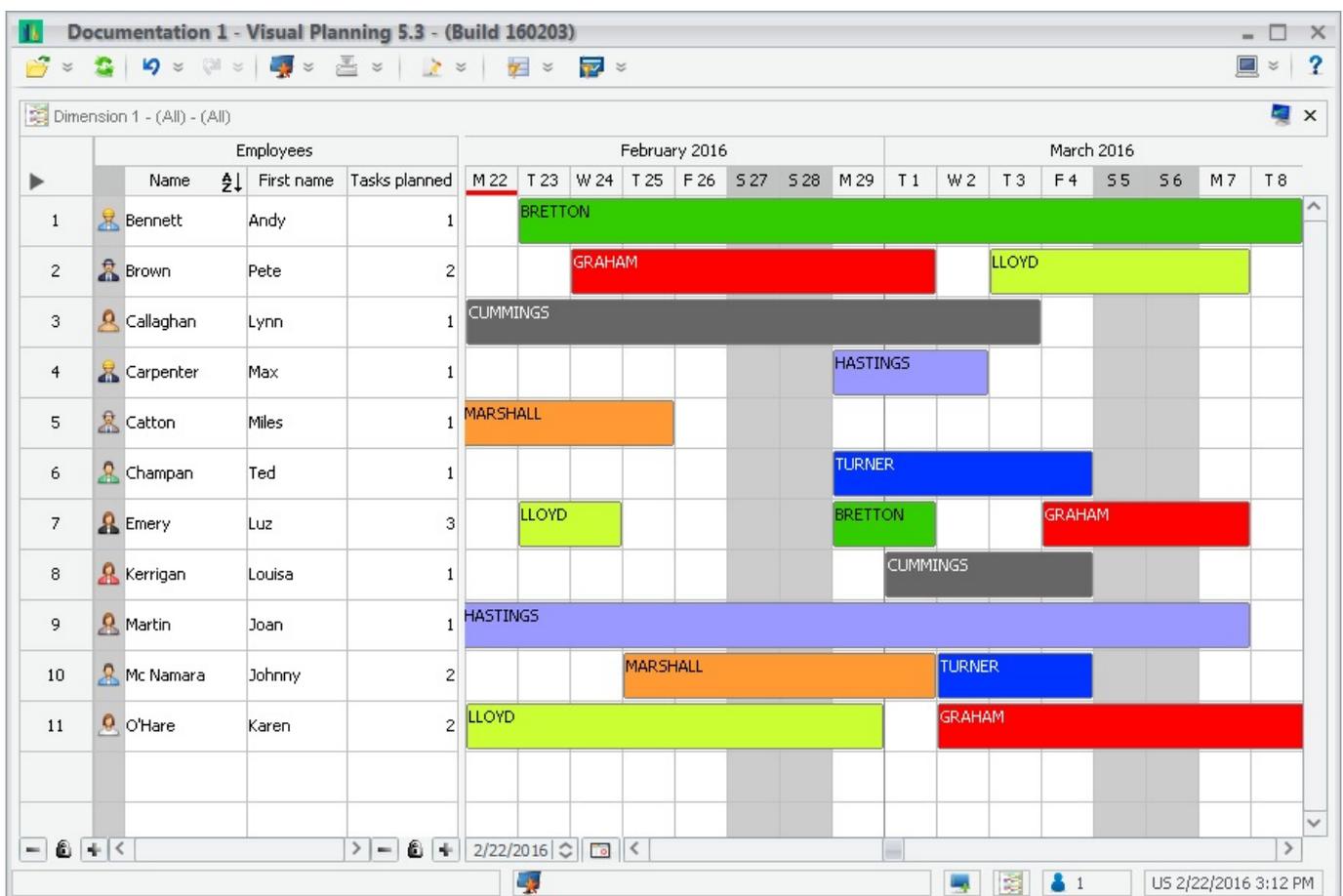
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Basic Concepts and Definitions

In this section we present the basic elements and terminology used in the menus and help messages of VISUAL PLANNING.

Main Window

VISUAL PLANNING's main screen is presented in the following way:

cf. Main screen

Resources

Resources of VISUAL PLANNING represent entities that must be planned.

Depending on the settings of the planner, it can be people, machines, customers, sites, projects,

facilities, etc.

cf. Resource

Headings

In a schedule view, resources are subdivided into columns, conventionally called headings in VISUAL PLANNING.

These headings are defined during the setup phase and provide information about each resource.

For example, for staff, one can define a heading for the name, another one for the position, department, telephone, reference number etc.

For machines, depending on requirements, heading for the type, ID number, weight, capacity, location etc can be created.

cf. Heading

Planner

The planner is the time grid on which the events are positioned.

The easiest way to visualize it is the horizontal way using the schedule view.

In the schedule view, the planner is shown on the right side of resources.

Events are represented on the grid with icons and/or horizontal color bars.

The columns are the time intervals. You can choose the time scale which is the most appropriate: one column per hour or per day, week, etc.

cf. Schedule view

Resources View

A resources view shows a list of resources from one dimension.

The Resources characteristics are defined when setting types of activities, projects, resources, etc.

cf. Resources view

Calendars

Certain date columns are grayed on the planner - these are non-working periods defined by configurable calendars.

Several calendars can be defined:

- Daily calendars show non-working days (possibly weekends and rest days).
- Non-working hours calendars, visible in hourly scales, show non-working periods (in 5-minute intervals).

cf. Calendar

Events

The bars representing the tasks are called events.

Events are core entities of VISUAL PLANNING - most of the information available from your planner is connected with events.

Each event is displayed on a row, displaying small icon and continues with a colored duration bar.

Each event can be displayed on the schedule with a colored duration bar. Its display optionally includes one or more icons.

Icons and colors are related to the resources of the event.

cf. Event

Event properties

Each event immediately has properties that are visible on the planner:

- The resource on which it is placed, depending on the view.
- Its start and end dates.
- Icon of one or more of its resources.
- Color of one or more of its resources.

Besides these characteristics, an event can contain many other properties that you can set according to your needs:

Notes

By double-clicking on an event, you can associate a note to it in free text (a kind of "Post-it").

Form

If necessary, you can define a form and associate it to events.

A form is a set of predefined fields when setting up, and whose contents are entered in each event.

Event valuations

If required, you can define event valuation items (e.g.: cost, load, quantity).

Item values will be set in the events, in order to pool them and draw up quantitative analyses of the work: load, costs, receipts etc.

The event value items are pre-filled in the creation rules and completed in the events.

The quantitative analyses are described in the control functions: control columns, workload and events reports.

cf. Valuation item

Management functions

The following functions assist you during your planning and allow you to analyse its consequences.

They help you:

- Choose useful data (filters).
- Analyse and quantitatively control the consequences of your planning (control columns, workload, events reports).
- Warn you or stop you if you carry out risky or illegal operations (constraints, links between events).

Filters

Filters allow you to display on the planner only those data which match criteria defined by the user. They help you, for example, to find resources that are available and suitable for a particular need.

They are also used so that users only see the data they are interested in, thus giving them a clear view of their planner.

cf. Search and Filter

Control columns

The Control columns are also customizable and display indicators for each resource.

cf. Control columns

Workloads

It is possible to calculate a load and a capacity for planning. These calculations can vary according to time and resource defined.

Workload

Events Reports

Cross tabulated tables can be displayed, printed or exported (in *.XLS format) using data from your planner.

These tables which are very flexible, give an overall or detailed analysis of event duration or values according to the break-down criteria you choose.

Event report

Constraints

Configurable constraints can prevent the simultaneous use of certain resources, or limit their use (maximum use).

Constraints can prevent the use of resources for tasks for which they are not suitable.

Constraints can be defined as blocking or as simple warning messages.

Constraint

Links between events

Links between events, represented by arrows on the planner, allow events which are linked to each other to be moved in a cascading way or if needed forbid certain movements which could jeopardize

the consistency of the planner.

Link

Introduction

Settings

DEFINITION

It is necessary to set up each planner before being able to use it.

The setting is unique for each planner. One may however use several planners with different customization on a VISUAL PLANNING installation.

Setting up involves all the functions which define how the planner is adapted to users' needs. During set-up the main entities which are used in the planning process are defined, especially the Dimensions containing the Resources that can be:

- Staff.
- Customers.
- Machines.
- Tasks.
- Projects.
- Sites.
- Etc.

These entities, as well as the headings which set out the structure are the basic and permanent elements for setting up a planner.

Other less basic elements can be defined at the design stage of the planner or added later:

- Forms.
- Valuation items.
- Events hierarchies.
- Events creation rules.
- Calendars.
- Constraints.
- Etc.

Filters, views and favorites displays complement this setting to obtain the simplicity needed for everyday use of the tool.

These features are very important because they provide significant time saving in planning.

The setup functions are to be found in the general settings menu.

PRECAUTIONS

VISUAL PLANNING is easy to use immediately through the data management (mainly resources and events).

These data are defined by the settings. It allows to structure the architecture of VISUAL PLANNING as for example:

- CRM Management.
- Inventory Management.
- Construction Sites Management.
- Project Management.
- Customer Service & Maintenance Management.
- Fleet Management.
- HR Management.
- Etc.

During the put up of VISUAL PLANNING, the step of setting is constitutive of the tool.

Entities related to the setting must be handled with care. Their importance should not be overlooked.

In the documentation, yellow banners of this type indicate the entities to handle cautiously:

The modification of this **entity** involves an important change in the planner's architecture.
It is a powerful act of setting which should not be made without consideration.
(c.f. precautions to take when modifying the settings)

Features impacted by these advice

All of the entities defining the structure are impacted:

- Dimension.
- Heading.
- Form.
- Valuation item.
- Creation rule.
- Events hierarchy.
- Time period.
- Period type.
- Daily calendar.
- Hourly calendar.
- Hourly pattern.
- Daily pattern
- Workflows.

This warning message is not displayed for all data manipulations in VISUAL PLANNING.

Feature not impacted by these advice

The life cycle of the planner does not normally require modifications of the settings.

These features are not concerned by this advice:

- Events.
- Resources.
- Links.

These entities are updated everyday by the users.

Throughout the login session of a planner, it is always possible to cancel an entry via the undo feature.

This relates only to data changes and not to changes in settings.

ASSISTANCE SERVICES

The setting is the most sensitive activity and causes the most important impact on planner use. Thus, it will reach the objectives of simplicity and cost effectiveness of the Visual Planning application.

This setting requires an understanding of the features of Visual Planning, to make the best of it.

A consulting service can be useful and even indispensable to define the best configuration for your needs.

To learn more about the services we can offer you: Contact us.

Settings

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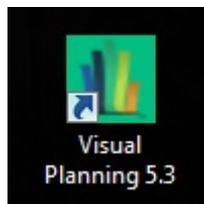
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Getting Started

Launch VISUAL PLANNING

VISUAL PLANNING ONE

To launch VISUAL PLANNING, **Double click on the shortcut** :
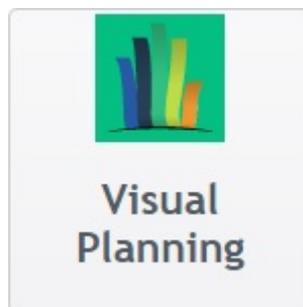

VISUAL PLANNING ESSENTIAL & ENTERPRISE

To launch VISUAL PLANNING, open the Intranet/Internet browser

Then enter the address formerly created to access Visual Planning. The format of the address is:

```
http://servername/vplanning/
```

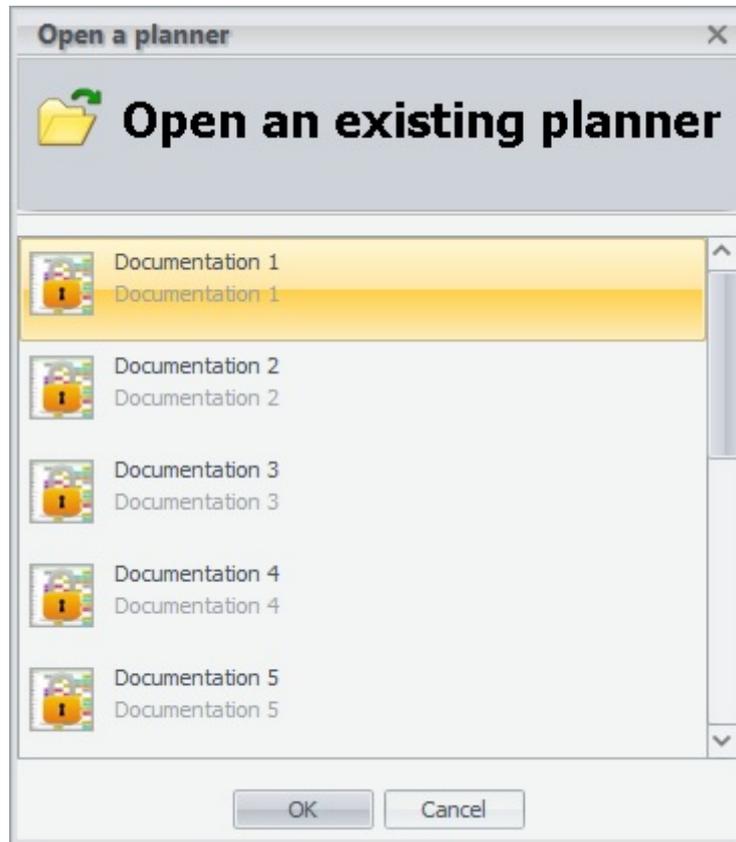On the page, **Left click** on the **VISUAL PLANNING** link

The identification window opens:

To login, enter:

- **Username**.
- **Password**.
- Click on **OK**.

cf. Users management

Open an existing planner

To open a planner, select "Planner > Open".

The list of planners you may access to is displayed:

The window only displays the planners that the user can really open, according to his rights.

Point on the planner you have to access to, select it and then click on "OK".

For a quick access to a planner, directly type the first letters of its name.

Open a planner recently used

It is also possible to open a recently used planner using the menu "Planner" > click the lower part of the "Open button".
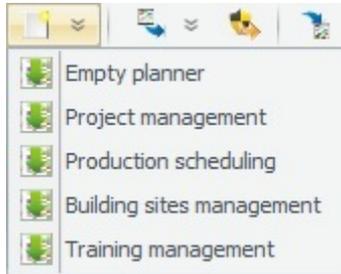
The last five planner used are displayed. Just select the one you need to use.
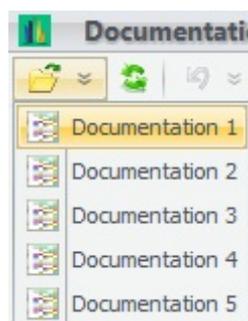
Create a new planner

To create a new planner, go to the menu **Planner > New**.

The following window will appear:

Choose the model from which to create the planner, then click the **OK** button.

The following window will appear:

Then:

- Define the **Name** of the planner.
- Define the **Description**.
- Click on the **OK** button.

cf. Planner models

Planner, pattern

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Planner models

DEFINITION

Planning models are provided during the installation of VISUAL PLANNING.

They permit to create new planners from an existing setup.

USE

Create a new model

cf. Export as model

Use a model to create a planner

cf Create a new planner

List of provided models

- Empty planner.
- Project management.
- Production scheduling.
- Building sites management.
- Training management.
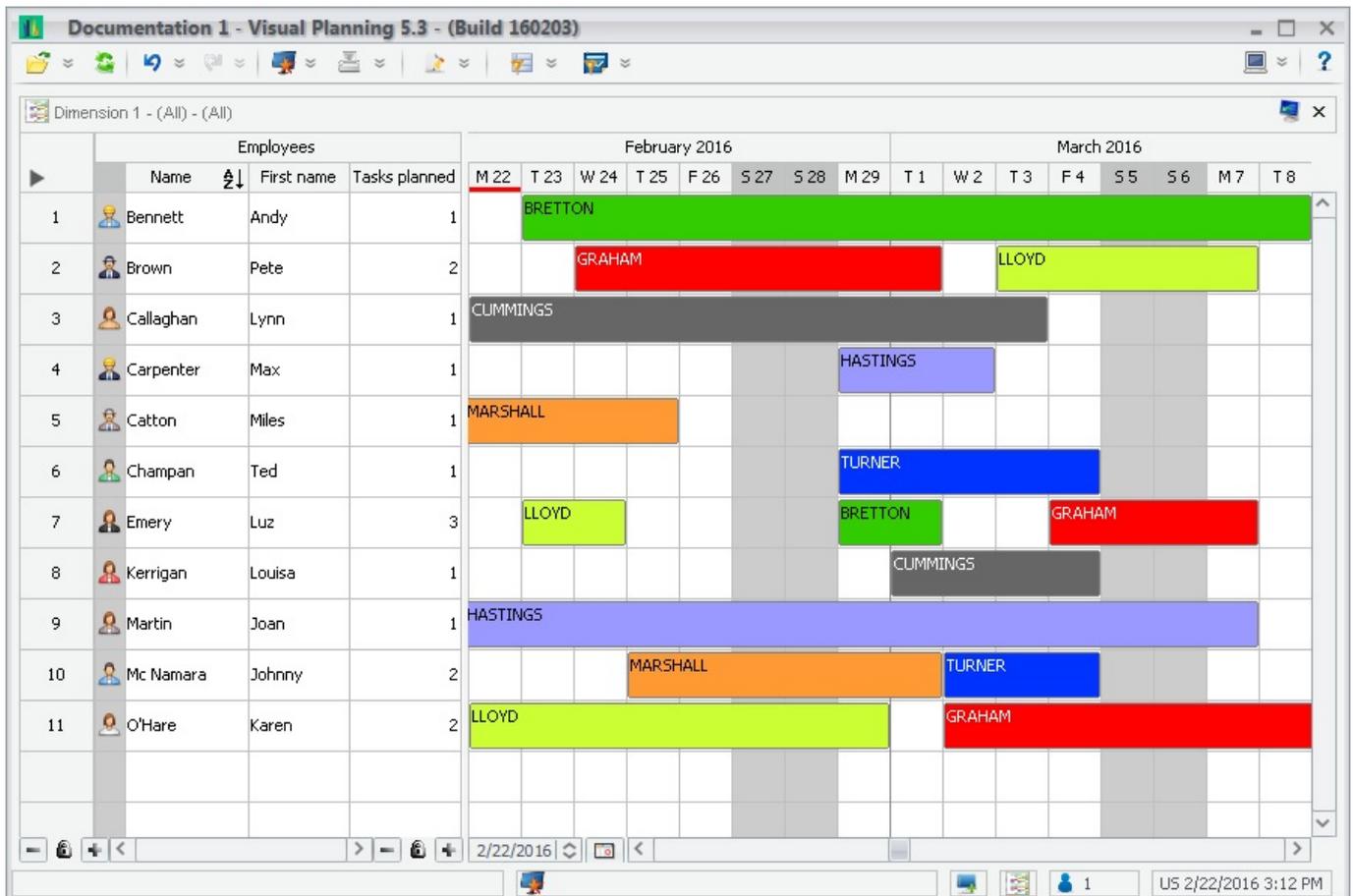
General overview of the user interface

The user interface of VISUAL PLANNING provides access to all features of the tool, subject to the rights of the user.

The main window looks like this:

c.f. Main window

Use of the mouse

Drag & drop

The moving of graphical objects on the planner is done by dragging them with the mouse (hold down the left button, move, and release).

cf. Shifting

Right button

The right button is reserved exclusively for the display of contextual "pop-up" menus.

You can use it on:

- Objects (e.g. an event or resource).
- An empty area of the planner.
- A column header.

cf. Context menu

Left button

The left button is used for all the other functions:

- Selecting an object.
- Choosing a command.
- Moving a graphical element.
- Etc.

By extension, documentation VISUAL PLANNING uses the term **Click** to describe left-click functionality.

c.f. Selection

Double click

The double click is used for accessing certain functions more quickly.

There is mostly a contextual menu that duplicates this function.

Keyboard-mouse combinations

- **Ctrl + left click**: selects several objects (resources, events, items in a drop-down list, etc.).
- **Shift + left click**: selects a whole interval or rectangle from the previously selected object (this selection spreads horizontally, vertically or diagonally if these are events).
- **Shift + Drag an event**: duplicates this event and drops the copy at the chosen place on the planner; the initial event remains where it was.
- **Alt + Drag from one event to another**: does not move the event, but instead creates a link between this event and the event on which you release the mouse cursor. Links are described in a specific section.

- **Ctrl + Drag from one resource to an event**, according to events hierarchies:
  - Assigns the resource to the event.
  - Replace the resource assigned by the selected resource.
  - Create a son event.
- **Ctrl + C**: copies a selection.
- **Ctrl + X**: cuts a selection.
- **Ctrl + V**: pastes a selection.
- **Ctrl + A**: selects all the events or all the resources of the view.
- **Ctrl + E**: opens the properties window of the selected events or resources.
- **Ctrl + R**: opens the edition window in order to add another resource.
- **Shift + Del**: deletes the selection without going through the warning message.
- **Shift + Insert**: pastes a selection into a single choice list.
- **Ctrl + Space on a text heading**: this is to visualize the list of existing values for this heading.
- **Alt + Right** and **Alt + Left** or **Alt + Wheel on the header of the schedule view** : changes the width of columns in the view without changing the time scale.
- **Ctrl + Wheel on the header of the schedule view**: changes time scale of the view.
- **F5**: refreshes the view.
- **Left and Right arrow keys**: Scrolls schedule and resources view to the left or right.
- **Ctrl + Drag from one resource to the schedule of another resource**: copy-past all events from the first resource to the second.
- **Ctrl + S**: Save the current favorite display.
- **Ctrl + Shift + S**: Save a new favorite display.

Multiple selections and operations

Many functions of Visual Planning can be applied simultaneously to several objects: events, resources of the same dimension.

To do this, first make a multiple selection using the mouse and the Shift and/or Ctrl keys, then click with the right button on one of the selected objects and apply the desired command. It will apply, in the same way, individually to each selected object.

cf. Selection

Information and command bars

The interface is controlled by the following command and information bars:
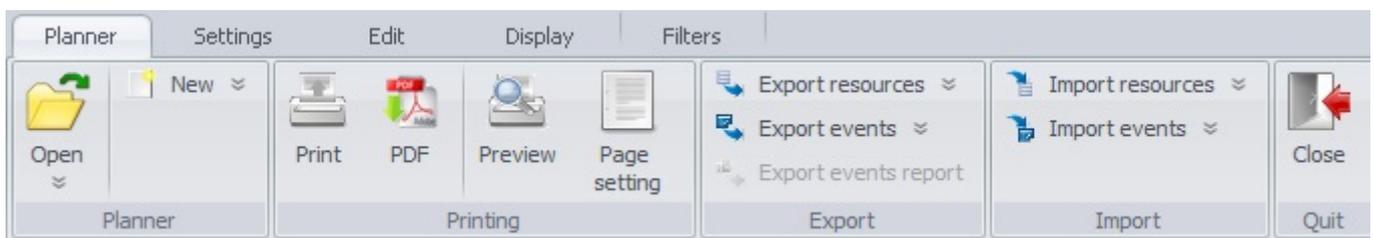
Quick access bar

This bar, at the top of the screen, provides access to particular features: cancellation, refresh and appearance management.
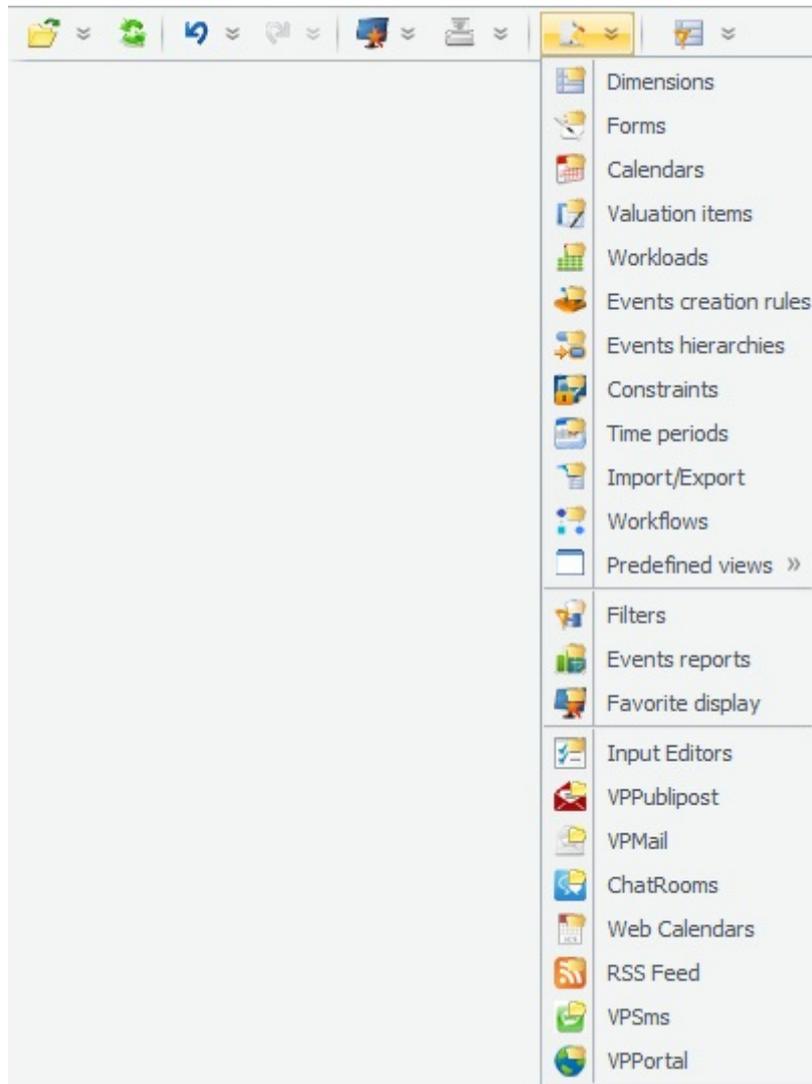
c.f. Quick access bar

Menu bar

Depending on the configuration VISUAL PLANNING has two possibilities of displaying menu bar:

- Standard version:

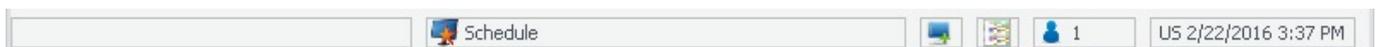This menu is divided into blocks containing sub menus. It provides access to many features.

- Smart toolbar (VISUAL PLANNING 5.3 version):

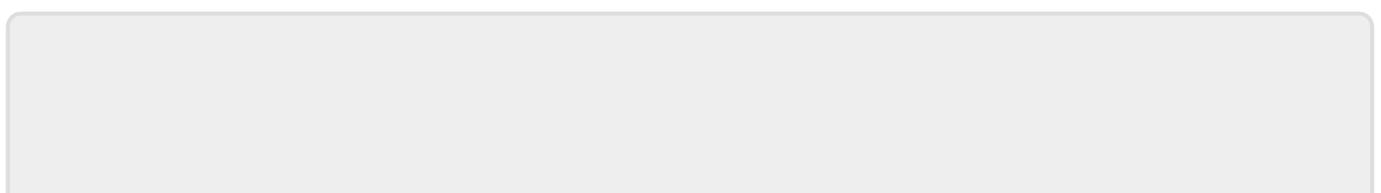You can select which version your planner will be using inside ADMIN CENTER and planner configuration.

c.f. Menu bar

Status bar

This bar, at the bottom of the screen, shows the number of users currently connected to this planner, as well as the date and time.

Presentation

From:

Multi-User Management

Stand Alone Version

In its stand-alone version, VISUAL PLANNING is an excellent personal organiser and allows several users successively to access the same data.

This version includes all the features needed to manage the planning of a service: prediction, monitoring the activity and delays, reports and analysis are an integral part of the tool, supplemented by the import and export of all data types.

Server Version

In its network server version, it takes on a whole other dimension: it then becomes a tool for managing and disseminating information among the various members of a work group or the whole company. It also enables the various departments and personnel to be informed of the progress of the tasks with may have an impact on their work.

Sharing planners in real time

The planners can be consulted and updated by several people concurrently. Each user views the changes made by the other users.

Although the database is always updated (any new or modified information is immediately recorded in the database), an automatic reloading is performed on the other user workstations (its frequency can be set by each user), so that every screen reflects the same information.

To force this update to be made, press the button on the tool bar. This operation enables the user to be certain that all the new or modified data will be taken into account at the moment they manually trigger the update.

With the planner thus updated, everyone can consult or modify it in full confidence.

NB: For a real time performance in collective use, each action in VISUAL PLANNING is immediately recorded in the database. There is therefore no manual save function.

If the machine crashes, or there is a break in the line or a power-cut, no operation that has already been carried out will be lost.

Users rights management

A special administrator's program admin center, is delivered with VISUAL PLANNING (in its network server version).

It allows to create users and assign them to various licences; to create, save and restore planners; to consult the list of users connected to a planner, etc.

Thus, for example, it is possible to exclude certain users from the set up functions and restrict their use solely to the resources and projects for which they are responsible.

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