Resource

DEFINITION

A resource is the basic element of which the schedule is managed in VISUAL PLANNING.

Resources are data in the dimensions.

From a business perspective, the dimensions may be:

- Human resources (managers, employees, subcontractors).
- Information resources (information technologies, etc.).
- Material resources (equipment, tools, buildings, rooms, etc.).
- Financial resources (budget, etc.).

Moreover, with VISUAL PLANNING, resources are also:

- Tasks/assignments.
- Absences.
- Statutes.

Any entity that can be planned is potentially one dimension and therefore a resource.

The resources of a dimension can be visualized through the views.

SETTINGS

A resource requires the existence of its belonging dimension.

The setting of a resource is defined by its belonging dimension, especially the headings thereof.

cf. Dimension settings

USE

A resource belongs to only one dimension.

Create a resource
To create a resource, there are several possibilities:

- Create a new resource: **Right-Click on a resource > Add**. In this case, some parameters are pre-filled: those of the belonging dimension of the new resource.
- Duplicate an existing resource: **Right-Click on a resource > Duplicate**. In this second case, the characteristics of the new resource are pre-filled by those of the resource which was duplicated.
- Create a new resource during assignment: cf. Assignment.

**Headings tab**

The first tab allows to seize the headings of the resource:

![Image of Headings tab]

**Settings tab**

The second tab allows to (re)define the other parameters of the future event which will be created with this new resource:
Among these characteristics (by default, those of the *dimension*), there are:

**Hourly calendar**

It concerns the *hourly calendar* of the future resource.

**Daily calendar**

It concerns the *daily calendar* of the future resource.

**Color**

The *color* of the resource will give a color to the resource and/or its events into the different *views*.

**Icon**
The icon of the resource can be viewed in the different views too.

**Events creation rule**

It concerns the creation rule of the future events of the resource.

It is possible to define no rule for a resource, but in this case, the event creation by drag & drop is impossible via this resource.

**Modify a resource**

The modification of a resource is done by a Right-Click on a resource > Modify or left-click on a resource > Ctrl+E.

The following window will appear:
Modify the characteristics and click on the **OK** button. (cf. [Create a resource](#))

It's also possible to **modify several resources at the same time**. First, select all the resources that need to be modify: Left-Click on the resource while maintaining the Ctrl button pushed.

Then, **right-click on one of the selected resources > Modify**.

The properties window is then opened, **in the header appears a figure in brackets, it's the number of selected resources** (in this example “4”):
The grayed headings are the ones that have a different value depending on the resource.

The non-grayed headings are the ones that have the same value for all selected resources.

Both type of headings can be modify.

Warning: in this case, the modification of a heading's value will affect all selected resources.

Modify the value of a resource

Changing the value of a single resource heading is made by a Right-click on a resource > Enter a common value.

The following window will appear:

Enter a value then click the OK button.
Just like it’s feasible to modify several headings at once for a selection of resources, it’s possible to modify only one heading’s value for a selection of resources.

Select the chosen resources (Left-Click + Ctrl button pushed) then Right-Click > Modify.

The following window will appear:

Modify the icon by a drag&drop

In a resource view, it is possible to change the icon of the resource by a Drag&Drop from the icons album to the selected resource.

This functionality is only available in a resource view.
Modify the calendar of a resource

With Drag&Drop

In a resource view, there are three ways to modify a resource calendar:

- Drag&Drop an hourly calendar on a resource.
- Drag&Drop a daily calendar on a resource.
- Drag&Drop a type of period on the resource’s planner.

To do this modification, the global settings panel must be available.

With the properties window

You can modify this calendar for a given resource.

Just make a Right click on the resource > Edit > Settings Tab:
Then:

- Choose another calendar in the list.
- Modify the chosen calendar by using the button: 

Warning: This action modifies the calendar (and potentially the events) of all resources related to this calendar.

- Create a customized calendar thanks to the button: 

  c.f. Resource's hourly calendar

With contextual menu

Hourly calendar

Right-click on a resource > Changing hourly calendar.

The following window will appear:
It's now possible to select an hourly calendar and apply it:

- To the whole planner by ticking the box Replace current calendar (action similar to above).

Warning: This action modifies the hourly calendar (and potentially the events) of all resources related to this calendar.

- To a limited period of time by choosing a start date and an end date (action similar to above).

Daily calendar

**Right-click on a resource > Changing daily calendar.**

The following windows comes up:
A daily calendar can be selected and applied to:

* The whole planner by ticking the box **Replace current calendar** (action similar to above).

Warning: This action modifies the daily calendar (and potentially the events) of all resources related to this calendar.

* To a limited period of time by choosing a start date and an end date (action similar to above).

**Duplicate a resource**

It's possible to duplicate a resource. This way if the creation of a similar resource is needed, you only need to change a few characteristics in the copy instead of creating a whole new resource.

cf. **Duplicate a resource**

**Import a resource**

It is possible to import one or several resources.

c.f. **Import resources**

**Export a resource**

It is possible to export one or several resources.

c.f. **Export resources**
Delete a resource

Right-Click on a resource > Delete to delete a resource.

Warning

The deletion of a resource implies the deletion of all the events related to this resource.

To delete a resource, you have to:

• Right click on the resource > Delete.
• Select the resource and press the keyboard button “Delete”.

The following message will appear:

It is then possible to click on:

• Yes to delete the resource.
• No to cancel the deletion.

To delete a selection of resources, you can:

• Either Right-click on a selection of resources > Delete.
• Either Select the resources + Delete button of the keyboard.

It is then possible to click on:
• Yes to delete the selected resource.
• Yes to all to delete all the selected resources.
• No to cancel the deletion of the selected resource.
• Cancel to cancel the deletion of all the selected resources.

Via this action, the resource or the selection of resources are deleted from the planner.

It is possible to cancel the deletion via the Cancel button or via the keyboard shortcut Ctrl + Z.

c.f. Annulation

View the resources

In a table mode view

The resources are viewed in a schedule view or a resource view in a table mode.

<table>
<thead>
<tr>
<th>Name</th>
<th>Type</th>
<th>Ecolan</th>
<th>Hour date</th>
<th>Barcode</th>
</tr>
</thead>
<tbody>
<tr>
<td>Bennett</td>
<td>A++</td>
<td>✔️</td>
<td>02/24/16 9:56 AM</td>
<td>![Barcode Image]</td>
</tr>
</tbody>
</table>

View the properties of one or several resources

It's possible to see the properties of one or several selected resources via a Right-Click on a (or on a group of) resources > Modify.

cf. Modify a resource

View through events

Some characteristics of the resources can be viewed using a vizualisation of events in:

• Schedule view.
• Diary view.
• Events view.

View the events of a resource

To do so, Right-Click on a resource > Modify.

The window contains an additional tab Events which lists the events of a resource in the form of an
**events view** which can be define by:

- Events filter.
- Time period.

It is then possible to interact with the events via a right-click on one of them. (cf. **Context menu**)

**Assign to another resource**

It is possible to assign a resource from one dimension to a resource of another dimension.

This functionality is possible via a **resource heading**.

This principle allows to associate to a “main” resource a “dependent” resource.

It allows to fully use the multidimensional principle of VISUAL PLANNING 5.0.

Moreover, during an event creation by the “main” resource, the “dependent” resource will be automatically assigned to the event. This action is possible if the **associate to events** case was checked at the time of the settings of the Resource heading type.
Sort on resources

It is possible to do a sort on the resources in a schedule view and a resources view.

cf. Sort

Select resources

The selection of one or several resources is simply done in these same views.

cf. Selection

Search resources

Any user of VISUAL PLANNING can search one or several resources in a schedule view and a resources view.

cf. Search

Resources filters

Finally, it is possible to create named resources filters or to do selection filters on the resources.

cf. Filter

Forum on resource

You can add a forum thread on each resource of one dimension.

cf. Forum

Resource, dimension
Assignment

A **Resource Assignment** is the association of this resource to an event or another resource.

Several cases exist:

- Assigning a resource to another resource.
- Assigning a resource to an event:
  - Depending on the availability.
  - Depending on the distance.
  - Automatically.

**Assign to another resource**

This feature is available for all resources that have a **Resource Heading**.

From the properties window of a resource by clicking on the button for choosing a “dependent” resource:

The following window will appear:

- Select the resource in the list (if the “Load all resources” is checked in the dimension):

- Click on the [...] button:
This window is used to select a resource.

For this, the following actions are available:

- **Select** a resource by left clicking on it.
- **Filter** visible resources by selecting a resources filter.
- **Search** resources through the identification headings of dimension.
- **Add** a new resource.
- Display more headings to make easy the choice with a double-click on the name of the dimension.

Some of these actions may be impossible, according to permissions of the user.

### Assign a list of resources to an event

Select the resource in the list (if the “Load all resources” is checked in the Dimension).

### Assign to an event according to the availability
This feature is available for all events.

From the properties window of an event by clicking on the button for choosing a resource: 

The following window will appear:

This window is used to select a resource.

For this, the following actions are available:

- **Select** a resource by left clicking on it.
- **Select** several resources by using Ctrl + left-Click on it (case of horizontal hierarchy).
- **Filter** visible resources by selecting a resources filter.
- Display only available resources according to an events filter and:
- The **duration**.
- The **load**.
- **Search** resources through the **identification headings** of dimension.
- **Add** a new resource.
- Display more **headings** to make easy the choice with a **double-click on the name of the dimension**.

Some of these actions may be impossible, according to **permissions** of the user.

**Notes:**

- If the same resource is assigned to several events in the same time, the **available** resources displayed in this window are those that are available on the duration of all selected events.
- For a **control column** headings that have **clicking date** option, the start date of the event is the pivot date to calculate.

**Assign to an event according to the distance**

This feature is available for all **events** if there is a **geolocation heading**.

From the properties window of an event by clicking on the button for choosing a resource: 

The following window will appear:
This window is used to select a resource.

For this, the following actions are available:

- **Select** a resource by left clicking on it.
- **Select** several resources by using **Ctrl + left-Click** on it (case of horizontal hierarchy).
- **Filter** visible resources by selecting a resources filter.
- Display only **available** resources according to an events filter and:
  - The **duration**.
  - The **load**.
- **Compute distance** by checking the box and selecting two geolocation heading.
- Choose **Location in** period of resources by checking the box and selecting the period.
- **Search** resources through the **identification headings** of dimension.
- **Add** a new resource.
- Display more **headings** to make easy the choice with a **double-click on the name of the dimension**.

Some of these actions may be impossible, according to **permissions** of the user.

**Notes:**

- If the same resource is assigned to several events in the same time, the **available** resources displayed in this window are those that are available on the duration of all selected events.
- For a **control column** headings that have **clicking date** option, the start date of the event is the pivot date to calculate.

**Calculate distances**

If the box Calculate the distance is checked, a column titled Distance appears

This column is not a type of field distance and is therefore not stored in the database.
This is only a column which facilitates the selection of resources.

It is calculated as the distance between two selected location-type topics.

c.f. Geolocation

**Period of location**

This option is useful only if the box Calculate the distance is checked.

If the box Location in is checked, choose a period in days or in hours:

- Before
- Or after

The distance calculation is then made based on the position of the resource in the events that follow (after) or above (before) the event on during the given period.

For resources with no localized event in the given period, it is considered that this is the topic of locating the resource that is taken as a benchmark for calculating distance.

---

Example :

<table>
<thead>
<tr>
<th><strong>business sense</strong></th>
<th><strong>Example of associated settings</strong></th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Durand lives in Lyon</td>
<td>Mr. Durand, the resource has a section type Geolocation whose value corresponds to Lyon</td>
</tr>
<tr>
<td>Mr. Durand is going on a trip to Marseille on Monday</td>
<td>Mr. Durand has an event on Monday that the “Activity” resource has a Geolocation field type and whose value corresponds to Marseille</td>
</tr>
<tr>
<td>Mr. Durand is not traveling on Tuesday</td>
<td>Mr. Durand has no localized event on Tuesday</td>
</tr>
<tr>
<td>Wanted someone to work in Paris on Wednesday</td>
<td>An event is positioned on Wednesday on a resource “Activity” including geolocation field type has a value that corresponds to Paris</td>
</tr>
<tr>
<td>How far is that Mr. Jones would have to go if he left the night before since home (Lyon)?</td>
<td>Allocation according to distance with a period equal to location 0 Day</td>
</tr>
</tbody>
</table>
How far is that Mr. Jones would have to go if he left the day before yesterday evening since his last workplace? (Marseille)

Allocation according to distance with a period equal to location 1 Day

Auto assignment

It is possible to allocate automatically resources to a set of existing events.

You need to define a criterion for allocation which is a filter and a set of headings.

c.f. Auto assignment

assignment, event, resource, availability
Resources filter

DEFINITION

Resources Filters allow to filter resources of a dimension according to many criteria.

This is a very important tool in the daily handling of the tool.

Resources filter simplifies the visualization and can be used by many features of VISUAL PLANNING.

Resource filters from the same dimension are a blend of one or more different types of criteria.

SETTINGS

Create a resources filter

To create a resources filter, go to:

- Globals settings panel, then Filters > Ressources Filters > Right click > Create Filters > Dimension:

The lower part is activated:
It necessary to specify the characteristics of the filter and click on the OK button.

The characteristics are the following:

**Name**

This is the filter's name.

**Description**

This is an optional description which can provide information on the usefulness of the filter.

**Private**

This box allows, if it is checked, to set the filter as private.

**History**

This is the date, the last modification hour and the last login who made the last modification.

This property is automatically updated.

**Setting only**

This box allows, if it is checked, to hide this filter in the filter menus.
Filter's criteria

By clicking on the right button 
, the criteria's filter window opens:

![Filter Window](Image)

To build the filter, the following operations are necessary.

Add a criterion

You can add one or more criteria to filter, by clicking on Add:

![Add Criteria](Image)

cf. Types of criteria and groups

Add a group of criteria

It is possible to create a group of criteria by two methods:

- Click on the Add button > Add a group of conditions.
• Select several criteria, then click on the **Group** button:

![Group button]

cf. **Groups of criteria**

It is possible to ungroup some criteria selecting them and then clicking on the button “Ungroup”.

**Delete a criterion or a group**

To remove a criterion or a group, click the **Delete**.

Deleting a group deletes all its components criteria.

**Duplicate a resources filter**

Through the Global Settings panel, it is possible to duplicate a filter **Filters > dimensions' filter > Dimension > right-click on the filter > Duplicate:**

![Filters panel]

The lower part of the window is then activated where criteria have to be modified. (c.f **Create a resources filter**)

**Modify a resources filter**

The modification of a filter is done in the Global Settings panel. **Click on Filters > Resources Filters > Dimension of the filter > Select the filter to modify.**

Then the lower part is activated where it is necessary to modify criteria. (cf. **Create a resources filter**)

https://www.visual-planning.com/doc/ Printed on 2017/11/10 10:42
Delete a resources filter

Before you delete a filter, it is suggested to check that it is not used by any other function (another filter, an event report, a constraint …).

To delete a filter, go into Global Settings > Filters > Select the filter > Right-click > Delete:

A confirmation window for the deletion appears:

Two options are available:

- Confirm the deletion with the button Yes.
- Cancel the deletion with the button No.

Deleting a filter is irreversible.

Types of criteria and groups

There are several different types of criteria that can be joined in groups.

Criteria on dimension's heading
In this case, the criterion is based on the **query mode** with the triplet: “Heading / Condition / Value”.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a heading of a dimension</td>
<td>equals to</td>
<td>Enter a value or check the box to ask depending on a dimension's or form's heading</td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't contain</td>
<td></td>
</tr>
<tr>
<td></td>
<td>begin with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't begin with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>

Moreover, conditions differ according to the **type of heading**.

It is possible to set the Value with the global variables of the user:

- `$USERNAME`
- `$GROUPNAME`

If the box **To ask** is checked, an entry window will be opened when launching the filter:

At the right side of the check box, a new edit button can be activated. Once activated, a new dialog box will appear allowing editing the **variable** name for the chosen criteria:

This named variable can be used in the definition of import or export contexts using URL address. Each variable will take the value marked in the specified URL, allowing to customize each time the
filter. cf. Exports & imports by URL.

**Criteria on dimension**

In that case, the criterion is based on the dimension's resources.

Two options are available, the **selection mode** and the **combined filter mode**:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection</td>
<td>is included in by holding down the <strong>CTRL</strong> key on the keyboard</td>
</tr>
<tr>
<td>Combined filter</td>
<td>is in the filter or create a resources <strong>customized</strong> filter</td>
</tr>
<tr>
<td>is not included in</td>
<td></td>
</tr>
<tr>
<td>is not in the filter</td>
<td></td>
</tr>
</tbody>
</table>

It is possible to check the box **To ask**. If it is the case, an entry window will appear when launching the filter.

cf. Combined filter

**Criteria on history**

<table>
<thead>
<tr>
<th>Criterion</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>History-Creation date</td>
<td>equal to</td>
<td></td>
</tr>
</tbody>
</table>

**Visualization:**

1. **Criteria group**
   - Verify all criteria
   - Verify at least one criterion

2. **Criterion Dimension 1**
   - Dimension 1
   - is included in
   - is not included in
   - equal to
   - To ask

3. **History criterion**
   - History-Creation date
   - equal to

**Visualization:**
It is possible to set the Value with the global variables of the user:

- `$USERNAME`
- `$GROUPNAME`

If the box “To ask” is checked, an entry window will be opened when launching the filter:

At the right side of the check box, a new edit button can be activated. Once activated, a new dialog box will appear allowing editing the **variable** name for the chosen criteria:

This named variable can be used in the definition of the import or export contexts using URL address. Each variable will take the value marked in the specified URL, allowing to customize each time the filter. cf. *Exports & imports by URL*. 
Criteria on events filter

This criterion allows you to filter resources based on the presence or absence of certain types of events on these resources.

Events are defined by a filter of events. So this is a **combined filter**.

<table>
<thead>
<tr>
<th>Type</th>
<th>Events filter</th>
<th>Relative to the period</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Contains no event or Contains at least one event from the events filter</td>
<td>Choose an existing filter or create a <strong>customized filter</strong></td>
<td>Intersect the period</td>
<td>Choose an existing <strong>Time period</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Cover the period</td>
<td>or create a customized time period</td>
</tr>
<tr>
<td></td>
<td></td>
<td>Included in the period</td>
<td>or check the box <strong>To ask</strong></td>
</tr>
<tr>
<td></td>
<td></td>
<td>Start in the period</td>
<td></td>
</tr>
<tr>
<td></td>
<td></td>
<td>End in the period</td>
<td></td>
</tr>
</tbody>
</table>

If the box **To ask** is checked, the period will be defined by the user when applying the filter.

Groups of criteria

Two possibilities are available:

- **Verify all criteria**: only resources that respect all criteria will be considered in the result of the filter. This option consists in an intersection of the criteria.

- **Verify at least one criteria**: once a resource satisfies at least one of the criteria, it will be taken into account in the result of the filter. This option is a common criteria.
USE

Launch a resources filter

cf. Launch a filter

Use by other functions

- by other resources filters
- Control columns
- Events values
- Workload
- Events Report

Resource, filter
Filter

DEFINITION

A Filter is a list of criteria which is used when the user wants to display only some specific data. When the user launches the filter, VISUAL PLANNING is checking each data to only show the ones fulfilling the criteria requested by the filter.

A filter can be either a resource filter or events filter.

A filter is:

- A list of criteria brought into a “Group of requirements”.
- Each criterion is composed of:
  - A resource or an event characteristic.
  - An operator.
  - A chosen value (or it might be a « to ask » value; in this case the user who launches the filter is choosing the value).
- A group of all the conditions of a group that respect the INTERSECTION or the UNION of all these conditions.
- Many groups of conditions can be group together.

TYPES OF FILTERS

Named Filter

There are two types of named filters:

- Resources filters.
- Events filters.

The named filters can be used by another functionalities:

- Views.
- Favorite displays.
- Control column headings.
- Events value heading.
- Workloads.
- Events reports.
- Constraints.
- Workflows.
- Import and Export, Publishing.
- Management of the permissions.
- Free periods.

**Combined Filter**

A filter can be combined with several other filters. Thus, a filter can be defined as a condition for another one.

A resources filter can be used:

- Resources filter.
- An Events filter.

**Selection Filters**

c.f. Selection filter

**Automatic Filter**

c.f. AutoFilter
USE

Launch a filter

A filter is applied via the menu bar in the top part of the screen.

The result is immediately seen in the current view.

Filter, resource, event
Event

DEFINITION

An Event is a colored rectangle placed on the planner.

It is the most detailed visualisation of a moment, an element of time.

The event will necessarily have the following characteristics:

- One or several resources.
- Start date/hour (The format is dd/mm/yyyy if you had chosen the British English and mm/dd/yyyy if you had selected the American English).
- End date/hour (the format is the same as the Start date format).
- Duration.
- Load.
- Progress state.

In addition to those characteristics, some other information can be attached to the event:

- Form.
- One or several valuation items.

The events may have different ranks so they can be organised into a hierarchy. (cf. Events hierarchy)

In a schedule view and in a diary view, an event is symbolized by a rectangle called a duration bar.

An event can be a working or a non working event.(cf. Working)

EVENT PROPERTIES

 cf. Events properties.

SETTINGS
The settings of an event are done through the settings of the other structural elements of the planner.

These elements are the dimensions, the calendars, the creation rules, the events hierarchies and eventually the forms and the valuation items.

**USE**

To know more about using events see:

- Events creation
- Events handling

event, data
Duration

DEFINITION

The duration allows to quantify the time, attributing it a number and a unit.

Depending on the entity type handling in VISUAL PLANNING, the time units can be:

- The day.
- The half-day.
- The hour.
- The minute.

The main duration used by VISUAL PLANNING is the event that results from the difference between:

- The end date/hour of the event.
- The start date/hour of the event.

This duration may be added, converted, and used by different features.

The maximum duration of an event is 20000 days.

SETTINGS

The settings are to initialize the duration of an event.

Events creation rules

Events creation rules are at the origin of event duration.

The default duration drives the creation. It can be:

- Undefined.
- According to the heading.
- Fixed value.
- The result of an operation between two headings.
- According to a resource's calendar.
Creation rules also determine if the event is worked or not. It is an important factor to get the end date/hour of the event depending on his duration. To get the event duration depending on his end date/hour (case of the import events).

**Calendars**

Hourly and daily calendars are an other parameter to determine the event duration but it has to be worked. Unworked periods are not included int the duration of a worked event. (cf. Hourly calendar and daily calendar)

**Example:**

The event follows a daily calendar on which Saturday and Sunday are unworked.

This event starts on Friday, ends on Monday. Its duration will be:

- Event worked: 2 days
- Event unworked: 4 days

**USE**

The duration of an event is used by many other features of VISUAL PLANNING.

**Initializing other features**

**Load**

The event load is determined by the following type of load:

- Automatic.
- In days per day.
- In Hours per day.
- In Hours per hour.
- In percentage.

**Example:**
A two days event duration has a load of 2 days per day.

cf. Load

Valuation items

The variable value of an event is determined by the duration of it, if the time unit of the valuation item:

- The day.
- The hour.
- The load in day (if the type of load varies depending on the duration).
- The load in hour (if the type of load varies depending on the duration).
- The type of the event.

Example 1: The time unit of the valuation item is the day.

A 2 days event has a variable valuation of 2.

The total value of the valuation item is then 4.

Example 2: The time unit of the valuation item is the load in day.

A 2 days event has a load of 2 days per days.

The load value is then 4 days.

This event has a variable value of 2.

The total valuation item is then 8.

cf. Valuation item

Calculation on the event duration

Control column heading

A control column heading permits to sum the duration of several events.

This duration can be:
Events duration (h): this is the sum of the events duration convert in hours. If if the events are hourly, it is simply the sum of these event duration.

Events duration (d): this is the sum of the events duration convert in days. If if the events are daily, it is simply the sum of these event duration.

Completed duration (h): this is the amount realized from the duration amount achievement of events converted to hours.

Completed duration (d): this is the amount realized from the duration amount achievement of events converted to days.

Free period duration (h): this is the schedule's free period convert to hours.

Free period duration (d): this is the schedule's free period converted to days.

Occupation duration (h): This is the resource's occupation period converted to hours. This duration is calculated by the recovery or non recovery of free periods and may not exceed the sum of these.

Occupation duration (d): This is the resource's occupation period converted to days. This duration is calculated by the recovery or non recovery of free periods and may not exceed the sum of these.

c.f Converting days to hours

Example:

A resource has a daily calendar which only Saturday and Sunday are not worked. It possesses a calendar schedule with 8 hours worked every day.

On this resource, an event is planned during the week. It starts Sunday and ends next Thursday. The achievement of this event is 50%.

The duration in days of the event is then 4 days. His duration in hours is 32 hours.

His achievement duration in days is then 2 days. His achievement duration in hours is 16 hours.

The free period duration in days on the week is 1 day. The free period duration in hours is 8 hours.
Workload

A **workload** permits to sum the duration of several events on periods.

Each period is linked to a **schedule view** which is used to visualize the workload. This duration can be:

- Events duration (h): this is the sum of the events duration convert in hours. If the events are hourly, it is simply the sum of these event duration.
- Events duration (d): this is the sum of the events duration convert in days. If the events are daily, it is simply the sum of these event duration.
- Completed duration (h): this is the amount realized from the duration **amount achievement** of events converted to hours.
- Completed duration (d): this is the amount realized from the duration **amount achievement** of events converted to days.
- Free period duration (h): this is the schedule's **free period** convert to hours.
- Free period duration (d): this is the schedule's **free period** converted to days.

**Example:**

An event starts Monday and ends on Tuesday.

Workload calculate the duration in days is visualized on a daily scale.

The workload value is equal to 1 day on Monday and 1 on Tuesday.

C.f **Converting days to hours**

**Events report**

An **events report** allows to sum duration of several events.

This duration can be:

- Events duration (h): this is the sum of the events duration convert in hours. If the events are hourly, it is simply the sum of these event duration.
- Events duration (d): this is the sum of the events duration convert in days. If the events are daily, it is simply the sum of these event duration.
- Completed duration (h): this is the amount realized from the duration **amount achievement** of events converted to hours.
- Completed duration (d): this is the amount realized from the duration **amount achievement** of events converted to days.
- Free period duration (h): this is the schedule's **free period** convert to hours.
- Free period duration (d): this is the schedule's **free period** converted to days.
- Occupation duration (h): This is the resource's occupation period converted to hours. This duration is calculated by the recovery or non recovery of free periods and may not exceed the sum of these.
- Occupation duration (d): This is the resource's occupation period converted to days. This duration is calculated by the recovery or non recovery of free periods and may not exceed the sum of these.
c.f Converting days to hours

Event value heading

A heading of this type is used to assign a resource to the duration of an event.

This duration can be:

- Duration in hours: this is the event duration. If his type is hourly, or the conversion is in hours, his type is hourly.
- Duration in days: this is the event duration. If his type is daily, or the conversion is in days, his type is daily.

c.f Converting days to hours

Operation heading

A heading of this type, in duration mode, allows to calculate a duration. This duration is the difference between two dates that come from two type of headings:

- Date/hour.
- Event value.

Example:

This heading permits to establish a calculated duration as the difference between an event ending date and the start date of an other event.

Converting days into hours

A duration can be convert into a number of days/hours.

Example:

A 3 days event duration. The calendar is 8 hours a day.

The duration in days for this event gives as a result a value of 24 hours.
Events properties

This page describes properties of an event.

This may require you read:

- Events creation.
- Event handling.

INTRODUCTION

The properties of an event are accessible through a:

- Right-Click on an event > Modify.
- Left-Click on an event > Ctrl+E.

The following window will appear:
**DATES BLOCK**

<table>
<thead>
<tr>
<th>Dates</th>
<th></th>
</tr>
</thead>
<tbody>
<tr>
<td>Start date</td>
<td>3/7/2016</td>
</tr>
<tr>
<td>End date</td>
<td>3/11/2016</td>
</tr>
<tr>
<td>Duration</td>
<td>5</td>
</tr>
</tbody>
</table>

Event type: Daily
Working: Yes
Reminder: (None)

**Dates details:**

- An **event type** can be:
Events properties

- Daily.
- Half-daily.
- Hourly.

- A **Start date** (The format is dd/mm/yyyy with UK language or mm/dd/yyyy with US language).
- An **End date** (Same as the Start date format).
- A **Duration**, which is the difference between the end and the beginning of the event. (cf. duration).
- The check box **Working** which defines if the event is working or not.

The maximum duration of an event is 20000 days.

**ACHIEVEMENT BLOCK**

A progress bar determines the percentage of **achievement**. It runs from 0% to 100%.

The check box **Automatic** allows to automate the achievement of the event.

According to the automatic or manual realization mode, the state of the event can be:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Progress state</th>
<th>Percentage of realization</th>
<th>Start date of the event</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>Planned</td>
<td>equals to 0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ongoing</td>
<td>between 0% (excluded) and 100%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Completed</td>
<td>equals to 100%</td>
<td></td>
</tr>
<tr>
<td>Manual</td>
<td>Planned</td>
<td>equals to 0%</td>
<td>superior to the current date (in the future)</td>
</tr>
<tr>
<td></td>
<td>Ongoing</td>
<td>equals to 0%</td>
<td>superior to the current date (in the future)</td>
</tr>
<tr>
<td></td>
<td>Urgent</td>
<td>between 0% (included) and 100%</td>
<td>inferior to the current date (in the past)</td>
</tr>
<tr>
<td></td>
<td>Completed</td>
<td>equals to 100%</td>
<td></td>
</tr>
</tbody>
</table>

**RESOURCES BLOCK**
The list of the resources is visible and modifiable. The visible resources belong to the existing dimensions in events hierarchy conform to the event configuration.

Each resource is represented by:

- Icon.
- Color.
- Text corresponding to the identification headings.

cf. Resource

### LOAD BLOCK

The Load exists in each event.

This load requires the choice of a load type which can be:

- Automatic.
- In day per day.
- In hours per day.
- In hours per hour.
- In days.
- In hours.
- In percentage.

Three values are taken by the event:

- **Value**: The Value according to the type which was defined above.
- **In hours**: The conversion in hours of the load.
- **In days**: The conversion in days of the load.
FORM BLOCK

This list allows to eventually choose a form associated to the event.

If a form is selected, a form tab appears into the properties window of the event.

This tab allows to view and modify the values of the headings of the form associated to the event.

This tab does not appear if the event has no form.

cf. Form

VALUATIONS BLOCK

This tab allows to view and modify the valuation items associated to an event.

It is possible to add a new valuation, to delete or modify an existing one.
It is useful to refer to the **valuations item** to a good understanding of the rest.

For each valuation item, the following characteristics are visible:

**Name**

The name of the valuation is shown in the left column.

**Time Unit**

The time unit determines the calculation mode of the valuations.

This unit can be:

- Day.
- Hour.
- Load in days.
- Load in hours.
- Of the event.

**Fixed value**

The fixed value of the valuation is a value associated to the existence of the event.

**Value per unit**

The variable value per unit is a value which allows to be proportional to the duration or to the load of the event. (cf. **Time unit** above)

**Coefficient**

The coefficient is the coefficient of the valuation.
Total(base)

This total is calculated thanks to the values precised above.

Total(global)

This total is the global value of the valuation. It is the result of the multiplication of the Total (base) with the global coefficient of conversion.

Total Valuation

Finally, this last total is the sum of all the valuation items of the event.

cf. Valuation item

NOTE BLOCK

The note of the event allows to add a multi-line text comment.

HISTORY BLOCK

These properties can not be modified.
The history of the event contains:

- The date and the hour of the creation of the event.
- The login of the user who created the event.
- The date and the hour of the last modification on the event.
- The login of the user who did the last modification.

It is also possible to register the detailed history of the events. To do so, the history tracker must be activated in at least one of the dimensions of the event. To see the detailed history, click on the history block of the event.

In addition to the properties above, the detailed history remembered all the modifications:

![Event History](image)

```
event, data, properties
```

From: https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION

Permanent link: https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/evenement_proprietes

Last update: 2016/03/07 12:51
Events Creation

This page describes the creation process of an event.

Reading the following pages might be required:

- Events properties.
- Events handling.

WAYS OF CREATING AN EVENT

There are several ways to create an event in VISUAL PLANNING.

- The Drag&Drop.
- The Copy-Paste of an event.
- The Copy-Paste of a resource on another one.
- The vertical repetition.
- The horizontal repetition.
- Automatically, when creating a resource.

1 - Drag&Drop

Resource on a planner or a diary

An event is created by a Drag&Drop of a resource on the planner or on the diary:
Resource on resource

It's possible to use the drag&drop to copy-paste all the events of a given resource onto an other resource.

To do it, drag a resource 1 onto a chosen date of the resource 2 planner. To be sure that you are on the resource 2 planner, check that the resource 2 is highlighted.

The following window will appear:

![Question](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/evenement_creation)

Two options are available:

- **Yes, from first** > All the events of the resource 1 will be paste on the resource 2 planner, the **first** event will **start** at the date chosen for the drag&drop.

- **Yes, from last** > All the events of the resource 1 will be paste on the resource 2 planner, the **last** event will **end** at the date chosen for the drag&drop.
Double click on a planner

**Double click** on the planner of the chosen resource. The windows allowing you to edit an event opens up.

2 - Using the mouse

Right click on the planner of the chosen resource > A contextual menu opens > Choose “**Add an event**”:

Two cases might exit:

- The resource has only one hierarchy,
- The resource is associated with two or more hierarchies. Choose the right hierarchy.

4 - Duplication

cf. Duplication of an event

5 - Repetition

cf. Repetition of an event
6 - Automatically, when creating a resource

When the check box **Automatic event creation** is checked, an event will be automatically created, immediately after a resource is created. This event will be placed by default to the current date.

cf. [Dimension settings](#)

**EVENT CREATION PROCESS**

VISUAL PLANNING runs a number of verifications before creating an event.

VISUAL PLANNING checks:

- The Resources linked to the event.
- The Creation rules.
- The Events hierarchies.
- The Permissions.
- The Constraints.

1 - Take into account the resources of the event

The associated resources are:

- Those which had been used for the creation by drag&drop.
- The possible dependent resources of these resources, i.e. the ones attached to a resource via the resource heading.

2 - Creation rules

Then, the **creation rules** are applied according to all the resources bound to the event.

These creation rules allow to add or replace the resources linked to the event and to give other characteristics to the event.

If a resource has no creation rule assigned, it will be impossible to create an event by a drag and drop of this resource.

3 - Event hierarchies

VISUAL PLANNING verifies that at least one **events hierarchy** allowing the creation of an event from
the selected resources exists. VISUAL PLANNING checks, not only the combination of resources used for the drag and drop, but also the resources bound to those ones via the resource headings.

There are three possible scenarios:

- No events hierarchy allows this combination of resources: the event is not created,
- An events hierarchy allows this combination of resources: the event is created,
- An events hierarchy allows the creation of the event with this combination of resources but one or more resources has to be selected and add to the event. Once the required resources are attached to the event, the event is created.

4 - Permissions

VISUAL PLANNING verifies in the permissions that the user is allowed to create this type of event.

Two scenarios are possible:

- The user has the permission to create the event: the event is created.
- The user is not allowed to create the event: A message box appears and the event is not created.

5 - Constraints

Finally, VISUAL PLANNING looks for a constraint linked to the creation of this type of event.

There is 4 types of constraints:

- Coherency constraints.
- Objective constraints.
- Time gap constraints.
- Thresholds either of the control columns or of the operation headings.

Three scenarios may happen:

- There is no constraint applicable to the event: the event is created.
- The event does not comply with a constraint and VISUAL PLANNING notifies that to the user, the following windows pops up automatically:

![Question dialog box](image)

This constraint is called a “Warning constraints”, it leaves to the user the choice to create or not the event despite the non-compliance of the event with a constraint.
- The event does not comply with a constraint and VISUAL PLANNING forbids the creation of the event: no event is created and the following window pops up automatically:

![Error window]

This constraint is called an **Imperative constraint**, there is no way for the user to create an event that is not fulfilling the constraint's conditions.

**event, search, filter, selection, sort**
Events Handling

This page lists all the operations can be done on an existing event.

This may require you read first:

- Events properties.
- Events creation.

VIEW THE EVENTS

The events are viewed in a schedule view, a diary view or a events view.

Example:

View of an event on a schedule view.

Some characteristics of the events can be viewed through the duration bar, notably their tooltips, in a schedule view or in a diary view.

Simultaneously, it is also possible to view the same events in different views.

To make easier the visualization in multi-views, it is possible to synchronize the characteristics on several views. (cf. Synchronization of the views)

ASSIGN A RESOURCE

The modification of the event resources implies the application of the creation rules and the verification of the events hierarchy. They must be conform.

To assign an additional resource to an event:
• Double-click on an event.
• Right-click on an event > Modify.
• Right-Click on an event > Assign.
• Ctrl + Drag&Drop a resource on an event.

According to the existing hierarchies, this action can:

• Add a resource to the existing resources of the event (one resource per dimension maximum).
• Create a son event which will have all the properties of the father event and the properties of the additional resource.

cf. Assignment

MODIFY AN EVENT

The modification of the event resources implies the application of the creation rules and the verification of an events hierarchy. They must be conform.

To modify the event properties, Right-Click on an event > Modify.

cf. Events properties

DELETE AN EVENT

To delete an event:

• Either Right-Click on the event > Delete.
• Or Select a group of events + DELETE button of the keyboard.

The following message appears:

Then, click on:

• Yes to delete the event.
• No to cancel.
To delete a selection of events, do:

- Either a **Right-click on a selection of events > Delete**.
- Or **Select the events + DELETE** button of the keyboard.

Then, click on:

- **Yes** to delete the selected event.
- **Yes to all** to delete all the selected events.
- **No** to cancel for the selected event.
- **Cancel** to cancel the deletion of all the selected events.

Via this action, the event or the selection are deleted from the planner.

It is possible to cancel this planner modification via the **Cancel** button or via the keyboard shortcut Ctrl + Z.

cf. Deletion

**DELETE EVENTS IN A DIMENSION**

It is possible to delete several events of a given size to a certain date.

c.f. Removing events from one dimension

**SELECT EVENTS**

The **selection** of one or several events is simply done in these same views.

cf. Selection

**COMPACT EVENTS**

The **compactage** allows to place a selection of events behind each other without time between them or with a fixed time between them.
c.f. Compact events

SHIFT AN EVENT

The events can be simply shift with the mouse.

cf. Shifting

DUPLICATE AN EVENT

It is possible to simply duplicate an event or a group of events.

cf. Duplication

REPEAT AN EVENT

cf. Repetition of an event

SPLIT AN EVENT

It is possible to split an event in two distinct events that have the same properties.

This operation can be done on a group of events.

Just Right-Click on the event > Split.

The division is made on the left of the cursor position.

If the split event have a valuation item which is fixed, the following window appears:
Click on:

- "Yes" or "Yes to All" (if several events are selected) to spread the valuation item value on the duration of each event created.
- "No" or "No to All" (if several events are selected) to keep the initial value for each event created.

**SEARCH FOR EVENTS**

Any user of VISUAL PLANNING can, in addition, search for one or several events in a schedule view or in a resources view.

cf. Search

**EVENTS FILTERS**

It is possible to create named events filters or to make selection filters.

cf. Filter

**SORT EVENTS**

It is possible to sort events in an events view.

cf. Sort

**EVENTS SUPERPOSITION**

Two events may be superposed on the same resource at the same date.
cf. Superposition of events

LINKS BETWEEN EVENTS

It is possible to create links between the events.

cf. Link

EVENTS IMPORT

It is possible to import one or several events.

cf. Import events

event, search, filter, selection, sort

EVENTS EXPORT

It is possible to export one or several events.

cf. Export events
Undo / Redo

DEFINITION

During a session of VISUAL PLANNING use, a user can undo the changes he has made:

- Change of the resource.
- Change of the events.
- Change of the links.
- Or change of the calendars.

All of his session changes can be cancelled if any change on structure (except calendars) has occurred.

USE

From the quick access toolbar, there is access to these functions through the buttons:

Undo

A click on the blue arrow \[\text{undo} \] cancels the last change.

The list of modifications that may be canceled is accessible by clicking on the arrow on the left:
Redo

It is possible to go back on the canceling by the redo function.

A click on the blue arrow cancels the last undo.

The list of cancellations that may be restored is accessible by clicking on the arrow on the right:

data, undo, redo

From: https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION

Permanent link: https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/notion_annulation

Last update: 2016/02/29 12:36
Selection

DEFINITION

The data that can be selected into VISUAL PLANNING are the resources, the events and the links.

EVENTS

Select an event

The selection of an event is simply done by a left-click on this one.

Select multiple events

It can be useful to select multiple events in order to apply a common action to these events: a shift, a deletion, a modification of their properties, etc.

Different methods are applicable to proceed to a multiple selection. These ones can be combined together.

CTRL + click

The easiest way is to left-click to select the first event, and then click on the following events by holding down the CTRL key.

Selection box

To do so, left-click to select the event on the left of the top of the rectangle, and then click on the event on the right of the bottom of the rectangle by holding the SHIFT key.

This selection is limited to the events that are visible with the active filters.
Extend a selection

Right-Click on one of the selected events.

The contextual menu suggests:

- Horizontally (to the right, to the left, in both directions).
- Vertically.

These selection extensions are limited to the events that are visible with the active filters.

CTRL + A

It is possible to select all the events in a planner, diary or resources view.

To do so, select one of the events of the view > CTRL + A.

Use filters to make a selection

To modify or delete all the events that have a certain characteristic, just apply a filter that only display these events, then select all the events and apply the modification.

The events that are not displayed by the filter are spared.

cf. Filter

RESOURCES

Select a resource

The selection of a resource is simply done by a left-click on this one.

Select multiple resources

It can be useful to select multiple resources in order to apply a common action to these resources: a shift, a deletion, a modification of their properties, etc.

Different methods are applicable to proceed to a multiple selection. These ones can be combined together.
CTRL + click

The easiest way is to left-click to select the first resource, and then click on the following resources by holding down the CTRL key.

CTRL + A

It is possible to select all the resources in a planner or resources view.

To do so, select one of the resources of the view > CTRL + A.

Use filters to make a selection

To modify or delete all the resources that have a certain characteristic, just apply a filter that only display these resources, then select all the resources and apply the modification.

The resources that are not displayed by the filter are spared.

cf. Resources filter

Selection resource window

cf. Assignment

LINK

Select a link

The selection of a link is simply done by a left-click on this one.

Select multiple links

It can be useful to proceed to a multiple selection of links in order to apply a common action to these links.
CTRL + click

The easiest way is to **left-click** to select the first link, and then click on the following links by holding down the **CTRL** key.

**Event, selection, link, resource**
Link

DEFINITION

A link creates a relation between two events. It is represented by a colored arrow. The first event is the “master” event, the second event is the “slave” event.

According to the way it is set up (behavior and resiliency), the movements of the “master” event can either move the “slave” event or inform that there is an incoherence in the wanted movement.

The movements of the “slave” event can either be blocked, or warn of the incoherence of the movement.

SETTINGS

Create a link

The creation of a link is subject to the users rights. If the user does not have the rights to modify at least one of the events referenced by the link, it will be impossible to create this link.

There are two ways to create a link:

- Slide the link from the “master” event to the “slave” one: **Left click + Alt** on the “master” event, hold the left-click and drop it on the “slave” event.
- **Select the two events and Edition Menu > Link Block > Link the events.**

The next windows appears:
The default settings are those of the latest creation of link even if it occurred in a previous session of Visual Planning.

Link type

- **End to Start**: from the end of the “master” event to the beginning of the “slave” event.
- **Start to Start**: from the beginning of the “master” event to the beginning of the “slave” event.
- **End to End**: from the end of the “master” event to the end of the “slave” event.
- **Start to End**: from the beginning of the “master” event to the end of the “slave” event.

Behavior

- **Adjustment mode**: when a “master” event is moved, the “slave” event too.
- **Warning mode**: all the movements are possible, but in this case, the color of the link changes if the delay is not respected.
- **Imperative mode**: if the delay is not respected, any change will be done.

Link mode

- **Strict delay**: the interval between the two events is equal to the defined delay.
- **Minimum delay**: the interval between the two events is greater or equal to the defined delay.
- **Maximum delay**: the interval between the two events is shorter or equal to the defined delay.

Delay type
**Daily**: the delay is set in number of days.
**Hourly**: the delay is set in hours/minutes.

**Delay**

It concerns the value of the delay (positive or negative value).

This value can be:

- A daily value: the number of days.
- A hourly value: the number of hours/minutes.

**Modify a link**

The modification of a link is subject to the users rights. If the user does not have the rights to modify at least one of the events referenced by the link, it will be impossible to modify this link.

To modify the features of a link, do:

- **Double-Click on the link**.
- **Right-Click on the link > Modify**.

To modify the link mode of a link, do:

- **Right-Click on the link > Link mode > Strict delay** or **Minimum delay**.

**Delete a link**

The deletion of a link is subject to the users rights. If the user does not have the rights to modify at least one of the events referenced by the link, it will be impossible to delete this link.

To delete a link:

- **Select the link and then press the Del button on the keyboard**.
- **Right-Click on the link > Delete**.
USE

Display

The links are visible only in a **Schedule view**.

The following displays concern End-Start links.

**Strict delay**

The graphic representation in a **Schedule view** of a link with a **Strict delay Link behavior** is as the following pictures:

- Adjustment mode or Respected Warning mode:

![Image]

- Non respected Warning mode:

![Image]

**Minimum and Maximum Delay**

The graphic representation in a **Schedule view** of a link with a **Minimum Delay Link behavior** or a **Maximum Delay Link Behavior** is as the following pictures:

- Adjustment mode or Respected Warning mode:

![Image]

- Non Respected Warning mode:

![Image]
Respect the links

This function allows to make sure that the interval between the events is modified to match the link delay.

To activate this function, **Right-Click on the link or the chained links** > **Link mode** > **Strict delay** or **Minimum delay**.

Tool tips

By running the cursor on a link, a tool tip appears:

![Tool tip](image)

cf. **Tooltip**

Error Message

If an event can not be moved because of the links, the following message appears:
Link, event
Compact events

DEFINITION

The compaction allows to place a selection of events behind each other without time between them or with a fixed time between them.

The event pivot is the one on which a right click is performed.

The order of the compaction is by start date or by creation date if start date is the same.

USE

Select the events to be compacted:

Then, Right click on the events > Compact events. Be careful concerning the event pivot (do the right click on this one):

The following window will appear:
Choose the time interval between each event and then click on the OK button.

Then, the events are compacted according to this order: by start date or by creation date if start date is the same:

When using this feature several times, the default settings are the ones that were used the last time. event, compact, compaction
Shifting

DEFINITION

Shifting event allows to change the start date of an event selection.
This feature is particularly useful for a shift on a large time interval.

USE

After making a Selection of one or more events, shift is available.

Drag'n drop

It is quite possible to make this shift by drag and drop in a schedule view.
This change is especially suitable in the case of shifting on a short term period.
If the resources of the event are changed during the drag'n drop, then the creation rule are re-applied.
The modification may not be possible depending on:

- Events hierarchy.
- Constraint.
- Permissions.

Event Properties

By right-clicking the event > Properties or a Double-click the event, it is possible to change the start date that causes a modification.
In the case of a multiple selection, all events are set to the same start date.
Resources are not changed and therefore the rules of creation are not recalculated.
The shift may not be possible depending on:

- Events hierarchy.
- Constraint.
Shift

Finally, it is possible to make this move by a dedicated functionality.

Resources are not changed and therefore the rules of creation are not recalculated.

The shift may not be possible depending on:

- **Events hierarchy**.
- **Constraint**.
- **Permissions**.

To use this feature, you must perform a **Right click on a selection of events** > **Shift**.

The following window will appear:

The choice list **Shift** can take two values for two different behavior:

- On the interval.
- To a date.

**On the interval**

This allows you to shift all selected events on a similar time interval.

The time difference between events is preserved unless the **calendars** needs to change it.
In this case, you must specify:

- Direction of shifting:
  - Backward.
  - Forward.
- Number of days.
- Number of hours (only for hourly events).
- Number of minutes (only for hourly events).
- Worked or not.

**To a date**

This allows you to shift all selected events to the same start date.

This feature is identical to change the start date in the properties window of the event.

In this case, you must specify:

- Start day.
- Start hour (only for hourly events).

**event, shift, date**
Duplication

DEFINITION

Duplication allows to repeat, copy and paste one or several data from the planning.

It is possible to duplicate:

- An event (cf. Duplication of events below).
- A resource (cf. Duplication of a resource below).

DUPLICATION OF EVENTS

Copy-paste a selection of event(s)

After a selection of one or several events, it is possible to duplicate.

This duplication can be made on other resources, other dates, within the same view or in another view.

To do:

1. Right click on the selection of events > Copy.
2. Click where you want to paste > Paste.

It is also possible to use keyboard shortcuts:

1. After selecting one or more events: Ctrl + C.
2. Click where you want to paste > Ctrl + V.

Duplicate a selection of events

After a selection of one or several events, it is possible to duplicate.

To do:

1. Right click on the selection of events > Duplicate.
2. Click OK.
Duplication of events by drag & drop

It is possible to duplicate an event by holding the SHIFT key on the keyboard, then performing a drag and drop of the event on another date or another resource.

Video

This feature is only available in the schedule view.

Repeat events horizontally

It is possible to repeat over the time a selection of one or several events.

To do it, **Right click on the selection of events > Repeat > Horizontally.**

The following window will appear:
**Every**

It is the repetition period. This period may be a number of:

- Year.
- Month.
- Week.
- Day.
- Half-Day.
- Third-Day.
- Quarter-Day.
- Hour.
- Half-hour.
- 15 minutes.
- 10 minutes.
• 5 minutes.

Working

The box Working allows, if checked, to specify that the period specified above relates only to working days.

Same day

The box Same day allows, if checked, to repeat All the months the same day of the month.

Example: All the first Monday of the Month.

Repeat until

This is to specify the end date of the repetition. It is not necessary to specify the number of repetitions.

Number of repetitions

This is to specify the number of repetitions. It is not necessary to specify the end date of repetitions.

Settings

It is possible to select a few features that may not be repeated in the new events created.

This features are:

• The note.
• The forms.
• The valuation item.

Working events

In case of a repetition of at least one working event, it is necessary to specify the behavior that should be taken in the horizontal repeat.
Three possibilities are available when a working event should be created in a non-working period:

- Skip non working periods.
- Move them to the next working period.
- Move them to the previous working period.

**Vertical events repeat**

In the schedule view, it is possible to repeat on the other visible resources, a selection of one or several events.

To do this, **Right click on the selection of events > Repeat > Vertically**.

The following window will appear:

![Vertical repeat window](image)

**Settings**

It is possible to set some features that can be repeated in the new events.

This features are:

- The note.
- The form.
- The valuation item.

**DUPLICATION OF A RESOURCE**

To do this, **Right click on the resource to duplicate > Duplicate**.

The following message will appear:
It is necessary to specify if the events of the initial resource should be duplicated or not.

Depending on the answer:

- **Yes**: The resource is duplicated with the events.
- **No**: The resource is duplicated without the events.

**DUPLICATION OF A VIEW**

To do this, **Click on Settings > Global Settings > Predefined views > Right click on the view to duplicate > Duplicate**: 

The following window will appear:
cf. Resources view

duplication, event, resource
Repetition of an event

This page explains the two ways of repeating an event in VISUAL PLANNING:

- The horizontal repetition
- The vertical repetition

Repeat events horizontally

It is possible to repeat over the time a selection of one or several events.

To do it, Right click on the selection of events > Repeat > Horizontally

The following window opens:
**Every**

It is the repetition period. This period may be a number of:

- Year
- Month
- Week
- Day
- Half-Day
- Third-Day
- Quarter-Day
- Hour
- Half-hour
- 15 minutes
Repetition of an event

- 10 minutes
- 5 minutes

Working

The box **Working** allows, if checked, to specify that the period specified above relates only to working days.

Same day

The box **Same day** allows, if checked, to repeat **All the months** the same day of the month.

Example: *All the first Monday of the Month*

Repeat until

This is to specify the end date of the repetition. It is not necessary to specify the number of repetitions.

Number of repetitions

This is to specify the number of repetitions. It is not necessary to specify the end date of repetitions.

Settings

It is possible to create a **Repeating group** in the new events.

This feature allows to set a “group” flag common to all events created.

Editing an event that belongs to a group will prompt the user to choose if the modification will be applied to the selected event or all events of the group.

In the second case, on a horizontal repetition, the editing fields of dates and durations will not appear in the dialog box. Validate the modification will then spread the new information inside all events of the group.

An event that belongs to a group of repetition can not be cut or compacted
It is also possible to select a few features that may not be repeated in the new events created.

This features are:

- The note,
- the **Forms**,
- the **Valuation item**.

**Working events**

In case of a repetition of at least one working event, it is necessary to specify the behavior that should be taken in the horizontal repeat.

Three possibilities are available when a working event should be created in a non-working period:

- Skip non working periods,
- Move them to the next working period,
- Move them to the previous working period.

**Vertical events repeat**

In the schedule view, it is possible to repeat on the other visible resources, a selection of one or several events.

To do this, **Right click on the selection of events > Repeat > Vertically**

The following window opens:
Settings

It is possible to create a **Repeating group** in the new events.

This feature allows to set a “group” flag common to all events created.

Editing an event that belongs to a group will prompt the user to choose if the modification will be applied to the selected event or all events of the group.

In the second case, on a vertical repetition, the editing fields of the main dimension's resource will not appear in the dialog box. Validate the modification will then spread the new information inside all events of the group.

An event that belongs to a group of repetition can not be cut or compacted

It is also possible to set some features that can be repeated in the new events.

This features are:

- The note,
- the **Form**,
- the **Valuation item**.

repetition, event
Search

DEFINITION

The **Search** function allows to select the resources according to the value of one or several headings.

This function is available in the following views:

- **Schedule view.**
- **Resources view.**

Searching resources function is only available on **persistent** headings.

The different possibilities are:

- The research resource that is the subject here.
- The research events (cf. Go to).
- The research of free period.

USE

The research resource is reachable via:

- A simple **Right-Click on a heading > Search.**
- A **Right-Click on the header of the view > Search.**
- With the button *Search* when a resource selection window is opened.

The following window will appear:

![Find : Employees](image)

Then, choose the different features of the request and click on:
Apply to start the research and do another research immediately.

OK button to start the research and close the window.

**Heading**

All the headings of the dimension on which the research can be done appear in this list.

**Condition**

Choose a condition into the available list, according to the heading type:

- Equals to.
- Not equal to.
- Contains.
- Doesn't contain.
- Different from.
- Begin with.
- Doesn't begin with.
- End with.
- Doesn't end with.
- Greater than.
- Less than.
- Greater or equal to.
- Less or equal to.
- Is included in.
- Is not included in.

**Value**

Enter the searched value that must have the same type as the heading.

In addition, two optional options are available:

**Add to visible ones**

If checked, the resources resulting from the research are added to the list of resources that are already displayed.
Search only in visible ones

If checked, the resources resulting from the research are chosen among the resources that are already displayed. Those which were not displayed remain excluded.

Search, data, resource
Go to

DEFINITION

The **Go to** feature allows you to position the selection of a resource according to the value of a heading.

There are:

- Positioning the view on a resource.
- Positioning the schedule at the start date or end of an event. (cf. Search)

This is possible in the following views:

- **Schedule view** to go to a resource or an event.
- **Resources view** to go to a resource or an event.
- **Events view** to go to an event.

USE

Go to a resource

This is possible only on **persistent** headings.

This feature is accessible via:

- A simple **Right click on a heading > Go to**.
- **Right click on the header of the view > Go to**.

The following window will appear:
Then select the different characteristics of the request, then click on **OK** to run the feature.

**Heading**

Appear in this list all headings of the dimension on which the positioning can be performed.

**Condition**

A condition must be choosen from the list of possible conditions, depending on the type of heading:

- Equal to.
- Not equal to.
- Contains.
- Doesn't contain.
- Begin with.
- Doesn't begin with.
- End with.
- Doesn't end with.
- Greater than.
- Less than.
- Greater or equal to.
- Less or equal to.
- Is included in.
- Is not included in.

**Value**

This is the desired value into the same type as the heading.

**Go to an event**

This feature allows you to position the visible schedule views to the start or end date of a given event.

It can be used:

- On a Events view.
- On the **Events** tab in the Properties window of a resource.

It is accessible via a simple **Right click on an event > Go to > Start Date** or **End Date**:
Then, the window closes and the planner is positioned to the start date or the end date of this event.

display, schedule, search

From:
https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION

Permanent link:
https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/aller_a

Last update: 2016/02/29 12:32
Free period

DEFINITION

A Free period is a period without any event.

The Look for free period option, which is described in this topic, contains two functionalities:

- Look for a common free period of several resources is only valid in a schedule view. The different steps are:
  1. Filter the resources that have a period which not have certain types of events.
  2. Place the schedule view on the first common free period of the resources.

- Search the 'Dimension' which look for the resources of the 'Dimension' that have a free period, available in a schedule view and a resources view.

The schedule of the searched resources has a period without any event of a certain type.

In addition, the “Free period duration” can be calculated:

- In a control column.
- To define the load and/or the goal of a workload.

cf. Availability

USE

The Filters Menu > Free period allows to use the two research functions of free period:

Common free period

This functionality allows to place the planner view in the beginning of the first common free period of several resources. These resources respected a certain filter.

So, a free period, on a planner view, is a period of time in which there is no event.
Using this function requires the choice of:

- All the events to be handled via two filters: a filter for the resources and a filter for the events.
- The research period.
- The duration of the free period.

The following window will appear:

![Common free period]

By clicking on the “OK” button, the research is made.

**Filters**

![Filters]

"Resources" filters

It allows to limit the research of free period to certain Resources.
To do so:

- Select the appropriate filter.
- Modify an existing filter.
- Use another customized filter.

cf. Resources filter

**Events filters**

It allows to limit the research of free period to certain **Events**.

cf. Events filter

**Search period**

The **period of time** in which you want to limit the research is defined in this field.

![](image)

A period which is created only for this **Free period** research is possible by choosing the **customized period type**. (c.f. Customized)

To know more about the time periods: cf. **Time period**

**Free period**

The duration of the free period must be defined:
Value

It is a number that represents the chosen duration in the chosen unity below.

Unit

This duration can be expressed in:

- Days.
- Half-days.
- Hours.
- Minutes.

Working

If this option is activated, the non-working periods will not be counted in the duration.

cf. Working

Search the "Dimension"

This functionality allows to research common resources that have the same free period. These resources contain commonly a period without events of certain type.

Using this function requires the choice of:

- All the events to be handled via two filters: a filter for the resources and a filter for the events.
- The research period.
- The duration of the free period.

The following window will appear:
By clicking on the “OK” button, the research is made.

**Filters**

"Resources" Filters

It limits the free period research only for certain **Resources**.

To do so:

- Select the appropriate filter.
- Modify an existing filter.
- Use a **customized** filter.

cf. **Resources filters**
Events filters

It allows to limit the research of free period to certain Events.

cf. Events filters

Search period

The period of time in which you want to limit the research is defined in this field.

A period which is created only for this free period research is possible by choosing the customized period type. (c.f. Customized)

To know more about the time periods: cf. Time periods

Free period

The duration of the free period must be defined:

Value

It is a number that represents the chosen duration in the chosen unity below.
Unit

This duration can be expressed in:

- Days.
- Half-days.
- Hours.
- Minutes.

Working

If this option is activated, the non-working periods will not be counted in the duration.

Discontinuous

If this option is activated, the research is done even if the free period is not continuous during the period of research.

cf. Working

Control columns, Event reports and Workloads

In the control columns, the Events Report and the workloads, the free period duration can be used to do some calculations.

If so, the calculation is done by choosing as:

- Calculation type: Free period duration (h) or free period duration (d).
- Period type: All, Bank holiday, Non working, Working, or another period type was created.

If the selected period type is All, the calculation is performed only on working time.

Period, free, availability, event, search, filter
Availability

DEFINITION

Availability is a period of time that resources have any events of a given type.

This is a period of time set with a lack of events in a defined filter.

When searching for resource allocation to an event, it is possible to reduce the list of resources that can be assigned according to a criterion of availability.

RELATED NOTIONS

- Free period,
- Available according to a filter,
- Available resources assignment.

availability
Customized

DEFINITION

The concept of customized entity is very useful in VISUAL PLANNING.

You can create for example, entity-specific filters without having to give them a name.

Customized filters can not be seen anywhere outside of the entity to which they are attached.

For example:

A custom filter for a workload is only visible in the setting window of the workload.

USE

List of VISUAL PLANNING entities that use customized items:

Customized Resources filters

- Criterion on dimension of an event filter.
- Criterion on dimension of a resource filter.
- Free period search.
- Target Constraint.
- Coherency Constraint.
- Time gap Constraint.
- Workload.
- Events Report.
- Permission Management.
- Web Calendars Module.

cf. Resources filter

Customized Events filters

- Control Column heading.
- Event value heading.
- Criterion on event filter of an event filter.
- Criterion on event filter of a resources filter.
- Free period search.
- Initiation and verification of a Target constraint.
- Initiation and verification of a Coherency constraint.
- Workload.
- Events Report.
- Permission Management.
- Web Calendars Module.

cf. Events filter

**Customized calendar**

- Assigning a hourly calendar to a resource.
- Assigning a daily calendar to a resource.

cf. Calendars

**Customized Time Period**

- Criterion on event filter of a resources filter.
- Free period search.
- Events Report.

cf. Time period

customized, filter, calendar, period, time
Events Filter

DEFINITION

Events filters allow to filter events of a planner based on criteria:

- All events characteristics: start date, end date, load, valuation.
- All headings that characterize resources of an event.

This is a very important tool in the daily handling of the tool.

Events filter simplifies the visualization and can be used by many features of VISUAL PLANNING.

Events filter is a group of one or several criteria.

SETTINGS

Create an Events Filter

To create an Events Filter, go to the Global Settings panel, Filters > Events Filters > Right click > Create Filters > Dimension:

The lower part is activated:
It necessary to specify the characteristics of the filter and click on the OK button.

These characteristics are the following:

**Name**

This is the filter's name.

**Description**

This is an optional description which can provide information on the usefulness of the filter.

**Private**

This box allows, if it is checked, to set the filter as private.

**History**

This is the date, the last modification hour and the last login who made the last modification.

This property is updated automatically.

**Setting only**

This box, if checked, makes this filter hidden in filter menus.
Filter's criteria

By clicking on the right button, the criteria's filter window opens:

To build the filter, the following operations are necessary:

Add a criterion

You can add one or more criteria to filter, by clicking on Add:

cf. Types of criteria and groups

Add a group of criteria
It is possible to create a group of criteria by two methods:

- Click on the **Add button** > **Add a group of conditions**.
- Select several criteria, then click on the button **Group**.

cf. **Groups of criteria**

**Delete a criterion or a group**

To remove a criterion or a group, click on **Delete**.

Deleting a group deletes all its components criteria.
Duplicate an Events Filter

Through the Global Settings panel, it is possible to duplicate a filter: **Filters > dimensions' filter > Dimension > Right-click on the filter > Duplicate**.

The lower part of the window is then activated where criteria have to be modified (cf. **Create an events filter**).

Modify an Events Filter

The modification of a filter is done in the Global Settings panel: **Click on Filters > Events Filters > Dimension of the filter > Select the filter to modify**.

Then the lower part is activated where it is necessary to modify criteria. (cf. **Create an Events Filter**)

Delete an Events Filter

Before you delete a filter, it is huge suggested to check that it is not used by any other function (another filter, an event report, a constraint ...).

To delete a filter, go into **Global Settings > Filters > Select the filter > Right-click > Delete**:

The following window will appear:
Two options:

- Confirm the deletion with the button **Yes**.
- Cancel the deletion with the button **No**.

Deleting a filter is irreversible.

**Types of criteria and groups**

There are several different types of criteria that can be joined in groups.

**Criteria on event**

In this case, the criterion is based on the **query mode** with the triplet: “Data / Condition / Value”.

| Data   | Condition | Value |
It is possible to set the Value with the global variables of the user:

- $USERNAME
- $GROUPNAME

It is also possible to filter the days of the week using two attributes:

- Start date.
- End date.

Criteria on dimension 's heading

In this case, the criterion is based on the query mode with the triplet: “Heading / Condition / Value”.

VISUAL PLANNING 5.3 DOCUMENTATION - https://www.visual-planning.com/doc/
The dimension to filter should be primary selected.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>equals to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn’t contain</td>
<td></td>
</tr>
<tr>
<td></td>
<td>begin with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn’t begin with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn’t end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>

Choose a dimension heading: Enter a value or check the box “To ask” or depending on a dimension's or form's heading.

It is possible to set the Value with the global variables of the user:

- $USERNAME
- $GROUPNAME

**Criteria on dimension**

In that case, the criterion is based on the dimension's resources.

Two options are possible: the **selection mode** and the **combined filter mode**.

<table>
<thead>
<tr>
<th>Selection</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Selection</td>
<td>is included in</td>
<td>choose the resources by holding down the <strong>CTRL</strong> key on the keyboard</td>
</tr>
<tr>
<td>Selection</td>
<td>is not included in</td>
<td>or check the box “To ask” or depending on a dimension's or form's heading</td>
</tr>
</tbody>
</table>
Combined filter

- is in the filter
- is not in the filter

select an existing filter
or create a customized resources filter
or check the box “To ask”

Criteria on history

In this case, the criterion is based on the query mode with the triplet: “Data / Condition / Value”.

<table>
<thead>
<tr>
<th>Data</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Creation date Modification date Created by Modified by</td>
<td>Equals to</td>
<td>Enter a value or check the box “To ask” or depending on a dimension's or form's heading</td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>begins with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ends with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>

It is possible to set the Value with the global variables of the user:

- $USERNAME
- $GROUPNAME

Criteria on form
In this case, the criterion is based on the query mode with the triplet: “Form heading / Condition / Value”.

The form to filter should be primary selected.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a form's heading</td>
<td>equals to</td>
<td>Enter a value or check the box “To ask” or depending on a dimension's heading or a form's heading</td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>begin with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>

It is possible to set the Value with the global variables of the user:

- $USERNAME
- $GROUPNAME

Events filters criteria

This is a combined filter.

Two types of criteria:

- **Is in the filter.**
- **Is not in the filter.**
Then choose an associated events filter or create a new customized one.

Groups of criteria

There are two possibilities:

- **Verify all criteria**: only events that respect all criteria will be considered in the result of the filter. This option consists in an intersection of the criteria.

- **Verify at least one criteria**: once an event satisfies at least one of the criteria, it will be taken into account in the result of the filter. This option is a common criteria.

USE

Launch Events Filter

cf. Launch a filter

Use by other features

The event filters can be used by many functionalities of VISUAL PLANNING:

- Events filters criterion.
- Events report.
- Constraints.
- Workload.
- Control columns.
- Events value headings.

Filter, event
Private

DEFINITION

The **private** feature is available for:

- Favorite display.
- Events report.
- Resources filter and events filter.

This feature is linked to an user profile and allows him to save parameters for his only private use. Other users cannot have access to the private favorites displays, the private events reports, the private resources filters and the private events filters of another user.

If the check box **private** is marked for one of the cases above, it appears in italics:
Only the super administrator can have access to the private favourite displays, the private events reports, the private resources filters and the private events filters of all users. He can visualize these private elements and identify them with a specific italic naming: *private name~user name*.

Example: *privateresourcefilter~user1*

*private, admin*
Working

**DEFINITION**

The Working concept is available everywhere in VISUAL PLANNING. It defines as a “layer” on the planner grid.

It is used by events, by Period types of calendars.

**USE**

**Working Period type**

A working period type is used to position calendar or worked events, it is also possible to specify the value of a coefficient for each period worked. This factor will be taken in the Valuation items.

cf. *Period type*

**Working Event**

A working event can only be positioned over a working period type.

In most cases, the events must be worked.

cf. *Event*

event
Selection filter

**DEFINITION**

This feature allows to filter certain selected resources or events, without creating a named filter. It is an help facility in handling data of VISUAL PLANNING.

**USE**

In a Schedule view

Right-Click on a selection of resources > Filter the selection:

Right-Click on a selection of events > Filter the 'Dimension' of selection:
In a Resources view

Right-Click on a selection of resources > Filter the selection:
Filter, selection

From: https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION

Permanent link: https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/filtre_de_selection

Last update: 2016/03/07 16:59
Sort

DEFINITION

The sort function allows to order the elements of a table of resources or events into a certain organization.

It is mainly the resources into a schedule view or a resources view, but also events in the case of an events view.

USE

Sort the resources in a table mode

In a schedule view, a resources view (table mode) or an events view, sort a persistent heading is displayed via the $\downarrow$ symbol which represents a sorting in the heading.

This Sort is an alphabetical sorting for a text heading and a numerical sort for a numerical heading. For a single choice list, the sort order will follow the order of the definition of the values. (cf. Sorting of elements of a list).

The opposite symbol $\uparrow$ represents an anti-alphabetical sort for a text heading or a decreasing sort for a numerical heading.

So, all the persistent headings, the calendars and the creation rules can be sorted.

Notice that the headings order is very important for the sorting result.

To sort:

- Right-Click on the header of a heading > Sort.
- Double-Click on the right part of the header of a heading.

Backup
A sort type can be registered into a **favorite display**.

**Sorting of elements of a list**

When the heading is a single or multiple choice type, when defining the calendars or defining the settings of VISUAL PLANNING, it is possible to do a manual sort of the elements of the list via the following blue arrows:

![Blue arrows](image)

It is sometimes possible to automatically sort the elements of a list via the **Sort** button.

data, sort, display
Superposition of events

DEFINITION

A superposition is shown in a schedule view when several events overlap on the same row of the schedule.

USE

Open / Close a superposition

A superposition is seen on the schedule by the arrow on the left of the resource that have this superposition.

By clicking on this green arrow, the superposition is:

- Closed - the events are overlayed:

  ![Closed superposition example]

- Opened - the resource is expended until all the events of the superposition are visible:

  ![Opened superposition example]

Open / Close all the superpositions

The «main» arrow in the left part of the top of the rows allows to open or close all the superpositions.
via only one operation:

![Diagram of employees](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/recouvrement_d_evenements)

NB: The position of this «main» arrow is memorized in the favorite displays.

**Forbid the superpositions**

Finally, it is possible to forbid or to restrict the superpositions by creating **Constraints**. cf. Constraint Event, superposition
Achievement

DEFINITION

Achievement sets the status of an event.

Achievement can be:

- Automatic according to the current date/time. In this case, we consider that the events follow automatically their progress as forecasted.
- Manual, that is defined by the user. In this case, an action made by the user specifies the progress of the event.

Thus, and as appropriate, there are different possible statuses:

- **Planned**: the event will take place. It is set in the future.
- **Urgent**: the event is late. This status exists only in the case of a manual achievement.
- **Ongoing**: the event is started, it follows its normal course. In the case of a manual art, it may even be ahead.
- **Completed**: The event took place, it is finished.

SETTINGS

The achievement may require a setting that is defined through the creation rules.

USE

Visualization

Achievement of an event is displayed on the duration bar in a schedule view or a diary view.

The duration bar can contain a progress bar:

![Progress Bar Example]

You can choose the color and position of the progress bar (Top, Center, Bottom).
In addition, the color of the urgent case (manual art only) may be visible as the color of progress bar or as a color on the event.

All these characteristics are chosen in the displays settings of the view.

**Direct modification in a view**

In a Schedule view or a diary view, it is possible to change the mode (manual or automatic) and the percentage of achievement, with a **Right click on an event > achievement**:

![Modification par l'édition d'événements](image)

The achievement block contains three parameters:

- Check box **Automatic** allows to automate the achievement of the event.
- Progress bar determines the percentage of **achievement**. It runs from 0% to 100%.
- State of the event is not modified and depends on several factors (cf. below).

**Automatic achievement**

In the case of an automatic achievement, modification of the achievement is done without user intervention.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Percentage of realization</th>
<th>Progress state</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>equals to 0%</td>
<td>Planned</td>
</tr>
<tr>
<td></td>
<td>between 0% (excluded) and 100%</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td>equals to 100%</td>
<td>Completed</td>
</tr>
</tbody>
</table>
It is possible to switch from automatic to manual achievement by unchecking the Automatic Achievement.

**Manuel Achievement**

In the case of a manual achievement, modification of the achievement is done with user intervention.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Percentage of realization</th>
<th>Start date of the event</th>
<th>Progress state</th>
</tr>
</thead>
<tbody>
<tr>
<td>Manual</td>
<td>equals to 0 %</td>
<td>superior to the current date (in the future)</td>
<td>Planned</td>
</tr>
<tr>
<td></td>
<td>equals to 0 %</td>
<td>superior to the current date (in the future)</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td>between 0% (included) and 100%</td>
<td>inferior to the current date (in the past)</td>
<td>Urgent</td>
</tr>
<tr>
<td></td>
<td>equals to 100 %</td>
<td></td>
<td>Completed</td>
</tr>
</tbody>
</table>

It is possible to switch from manual to automatic achievement by checking the Automatic Achievement.

**Related Concepts**

Achievement can be used by others features:

- Filter.
- Events report.
- Control column heading.
- Import events and export events.

achievement, event
Load

DEFINITION

This is one of the event properties. An event can be a different 100% occupancy.

We can segregate:

- The implementation period of the task generally represented by the duration.
- The current amount of work to do: load.

For example, the load may be:

- A number of days per people.
- A number of pieces per hour.

SETTINGS

The settings are to initialize the load of an event.

Events creation rules

Events creation rules are managing default event load.

The default load drives the creation. It can be:

- Undefined.
- According to the heading.
- Fixed value.
- The result of an operation between two headings.

The type of load drives the creation too. It can be:

- Undefined.
- According to the heading.
- Fixed value.
USE

The load can be used in several features:

- Workloads.
- Control column heading.
- Event value heading.
- Events report.
- Filter.

load, event
Autofilter

**DEFINITION**

An **Autofilter** is a filter which is automatically generated on certain heading types.

The automatic filters are reachable via the **menu bar** in a **schedule view**, among the other filters of the dimension on the view.

**SETTINGS**

The implementation of this functionality occurs when setting the heading.

Only the headings having a closed list of values answer to this type of filter.

The types of headings which are possible are:

- Single choice list heading.
- Resource heading.
- Boolean heading.

**USE**

The use automatic filters user must apply them to the specific view.

It can be done in the **menu bar** or from the **context menu**.
Context menu

Context menu is a menu that appears by right-clicking on a resource, an event, or the date. This menu is different depending on the view and used according to where was done the right click.

Some elements of these menus are grayed out depending on previous actions taken by the user.

EVENTS VIEW

Context menu on event

This menu is accessible by right-clicking on an event.
- Modify : c.f. Event
- Duplicate : c.f. Duplicate
- Add event: c.f. Add event
- Shift : c.f. Shift an event
- Repeat : c.f. Repeat an event
- Assign a resource : c.f. Assign a resource
- Achievement : c.f. Achievement
- Go to : c.f. Go to
- Copy/Cut : c.f. Copy/Cut an event
- Delete : c.f. Delete an event
- Print : c.f. Print
- Export events : c.f. Export Events
- Import events : c.f. Import Events
- Mail merge : c.f. Mail merge
- Send an email : c.f. Mail
- View location : c.f. GeoLocation
- View routing : c.f. GeoLocation
Context menu on heading

This menu is accessible by right-clicking on headings header.

- Sort: cf. Sort
- Fit width: Adjust the width of the column or all depending on the number of characters
- Header height: Adjust the height of the column: twice, third or forth the normal size
- Filter resources: Resources filter
- Use AutoFilters: cf. Autofilter
- Filter events: cf. Events Filter
- Choose period: cf. Time period
- Filter resources from others dimensions: cf. Resources filter
- View all: it displays all the events
- Print: cf. Print
- Modify display settings: cf. Events view

Context menu on view

This menu is accessible by right-clicking on view header.
• Filter resources : cf. Resources filter
• Use AutoFilter : cf. Autofilter
• Filter events : cf. Events Filter
• Choose period : cf. Time period
• Filter resources from others dimensions : cf. Resources filter
• View all : it displays all the events
• Print : cf. Print
• Modify display settings : cf. Events view

RESOURCES VIEW

Context menu on resource

This menu is accessible by right-clicking on a resource.
• Modify: cf. Event
• Modify the value: table view resources, you can change the field value for the resource that was selected
• Changing hourly calendar: Assign or modify the hourly calendar
• Changing daily calendar: Assign or modify the daily calendar
• Fill free periods: for a selected period, it is possible to fill the periods without events. To do this, the following window opens:

Then, select:

1. The period where the events should be created
2. The events filter to launch
3. The hierarchy describing the events to create
4. If the creation of events should be done **per free period** or **per unit in the free period**.

- Add: cf. [Create a Ressource](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)
- Delete: cf. [Delete an event](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)
- Filter the Selection: c.f. [Selection filter](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)
- Import resources: cf. [Import Resources](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)
- Send an email: cf. [Mail](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)

### Context menu on headings

This menu is accessible by right-clicking on a resource.

#### Context menu Table mode

![Context menu Table mode](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)

#### Context menu Tree mode

![Context menu Tree mode](https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/menu_contextuel)
**Functions**

- Search : cf. Search
- Go to : cf. Go to
- Fit width : permits to adjust the width of the heading or all headings
- Sort : cf. Sort
- Filter the resources : cf. Ressources filter
- Autofilters : cf. Autofilter
- View all : it displays all the resources
- Search for free period : cf. Free period
- Enter a common value : give the same value in the selected heading for all resources
- Print : cf. Print
- Display settings : cf. Display settings

**SCHEDULE VIEW**

**Context menu on resources**

This menu is accessible by right-clicking on a resource.
Modify: cf. Event
Modify the value: table view resources, you can change the field value for the resource that was selected
Changing hourly calendar: Assign or modify the hourly calendar
Changing daily calendar: Assign or modify the daily calendar
Fill free periods: for a selected period, it is possible to fill the periods without events. To do this, the following window opens:

Then, select:

1. The period where the events should be created
2. The events filter to launch
3. The hierarchy describing the events to create
4. If the creation of events should be done per free period or per unit in the free period.

- Print: cf. Print
- Add: cf. Create a Ressource
- Duplicate: cf. Duplicate
- Delete: cf. Delete an event
- Filter the Selection: c.f. Selection filter
- Filter Events: cf. Events filter
- Export resources: cf. Export Resources
- Import resources: cf. Import Resources
- Send an email: cf. Mail

**Context menu on headings**

This menu is accessible by right-clicking on a resource.

**Context menu table mode**

**Context menu tree mode**
### Functions

- Search : cf. Search
- Go to : cf. Go to
- Fit width : allows to adjust the width of the heading or all headings
- Sort : cf. Sort. This option is only valid in a table mode view.
- Header height : allows to manage the height of the headings' header.
- Filter the resources : cf. Ressources filter
- Autofilters : cf. Autofilter
- Search for free period : cf. Free period
- Enter a common value : ON if you clicked on the heading, give the same value in the selected heading for all resources
- Print : cf. Print
- Display settings : cf. Display settings

### Context menu on events

This menu is accessible by right-clicking on an event.
- Modify : cf. Changing the event properties
- Duplicate : cf. Duplicate
- Shift : cf. Shift an event
- Split : cf. Split an Event
- Repeat : cf. Repeat an Event
- Compact events : c.f. Compact events
- Assign a resource : cf. Assign a ressource
- Achievement : cf. Achievement
- Respect links : cf. Respect the links
- Extend selection horizontally/vertically : cf. Extending selection
- Filter the selection > Dimension: cf. Resources filter
- Select linked events : c.f. Links
- Selection filter : c.f. Ressource Filters
- Copy/Cut/Paste : c.f. Copy/paste an Event
- Delete : c.f. Delete an Event
- Print : c.f. Print
- Send an email : c.f. Mail
Context menu on links

This menu is accessible by right-clicking on a link.

- Modify : cf. Modify a link
- Link mode : cf. Link mode
- Respect links : cf. Respect the links
- Delete : cf. Delete link

Context menu on the header of the schedule

This menu is accessible by right-clicking on the header of the schedule.
• Scale : cf. Time scale
• Scroll : cf. Scroll
• View non-working days : cf. Worked
• Display the night hours : Siplay/hide nights hours according to the defined limit : c.f. Schedule view
• Display weeks : display the week numbers on the schedule
• Filter Events : cf. Events Filter
• Filter Dimensions: cf. Resources filter
• Print : cf. Print
• Display settings : cf. Schedule view

Context menu on schedule

This menu is accessible by right-clicking on the schedule.

• Copy/Cut/Paste : c.f. Copy/Paste an Event
• Add event : c.f. Create event
• Filter Events : c.f. Filter events
• Filter Dimensions : c.f. Filter ressources
• View all : when selected, all events are visible
• Highlight : c.f. Highlight
• Common Free Period : c.f. Free Period
• Print : c.f. Print
• Display settings : c.f. Display settings
DIARY VIEW

Context menu on events

This menu is accessible by right-clicking on a event.

- Modify : cf. Change event properties
- Duplicate : cf. Duplicate
- Shift : cf. Shift an Event
- Repeat : cf. Repeat an Event
- Assign a resource of a dimension : c.f. Assign a resource
- Achievement : cf. Achievement
- Copy/Cut/Paste : cf. Copy/Cut an event
- Delete : cf. Delete an Event
- Print : cf. Print
- Send an email : cf. Mail
Context menu on the header

This menu is accessible by right-clicking on the header of the diary.

- Mode : cf. Diary View
- Scale : cf. Time scale
- Display the night hours : Display/hide the night hours according to the limits of the view. cf. Diary View
- Filter the resources : cf. Resources Filter
- Event Filters : cf. Events Filter
- Print : cf. Print
- Display settings : cf. Display settings

Context menu on the diary

This menu is accessible by right-clicking on the header of the diary.
EVENTS REPORT VIEW

Context menu on the header

This menu is accessible by right-clicking on the header of the view.

- Copy/Cut/Paste : cf. Copy/Cut an event
- Events filter : cf. Events Filter
- Resource filter : cf. Resources Filter
- Print : cf. Print
- Display settings : cf. Display settings

- Events report : cf. Event report
- Display Type : cf. Display Type
• Print : cf. Print
• Export events report : cf. Export events report

Menu, context, resource, event, schedule, diary
Highlight

DEFINITION

This feature is accessible from the context menu of a schedule view, allows to tint all events that do not meet a filter to increase the visibility of those who respond.

For example: let visible all events from a project, but tint events from other projects.

USE

From a schedule view, Right click on the schedule > Highlight.

Then, choose an event filter:

Then, the events that do not responds to the filter appear in gray color:
To cancel this highlight, restart it with (All) Filter or relaunch the favorite display.
Customized Filter

**DEFINITION**

In some VISUAL PLANNING features it's possible to create filters straight from the feature without having to do it through the tab “Settings > Filters”. Those filters are called **customized filters**.

A customized filter can be either a **resource filer** or a **events filter**. The criteria used to create customized filters are the same as for the named filters.

Customized filters can only be viewed and used in the feature they were created in. However, it is possible to name those filters so they are available in all VISUAL PLANNING features.

Let's take for example **events reports**.

An events report is based on a dimension, this dimension can be filtered in the event report feature using a customized filter. To filter the dimension using a customized filter choose “Customized” in the drop down list:

![Events report]

The following window opens. You need to define the criteria of this filter:
Once all the criteria are defined, the filter can remain customized or it is possible to named it if needed. To do that, click on “Customized”, two icons appears. Click on the icon on the left:

Name the filter and click on “OK”: 
Customized Filter

Filter 'Dimension 1'

Name: Filter name

Description:

Filter criteria:

Add Group Ungroup Delete Move Up Move Down

Criteria group:

- Verify all criteria

- Verify at least one criteria

Criterion headings - Dimension 1

Heading 1 equal to

To ask:

From: https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION

Permanent link: https://www.visual-planning.com/doc/en/4-manipulation_des_donnees/filtre_personnalise

Last update: 2016/04/18 13:40
Colors

VISUAL PLANNING can use multiple colors for multiple features. Mostly, these colors can be changed through the color palette.

Colors using the color palette

- Color of the resource.
- Color of the highlight (cf. : Schedule view, Diary view, Resources view).
- Background color of the event (cf. : Schedule view, Diary view, Resources view).
- Outline color of the event:
  - Selection.
  - Urgent.
  - Achieved.
- Color of the progress bar:
  - Urgent.
  - Achieved.
- Pixels icon.
- Color of the daily and hourly schedule.

C.f. Color palette

Other editable colors

- Skin of the main screen.

Color

From:
https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION

Permanent link:

Last update: 2016/02/29 12:44