Layout and Visualization

- Main Window
- Views
  - Schedule view
  - Resources view
  - Diary view
  - Events view
  - Events report view
- Favorite Displays
- Input editors
- Duration bar
- Time Scale
- Couleur

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Permanent link: https://www.visual-planning.com/doc/en/5-gestion_de_l_affichage/start

Last update: 2013/10/07 14:34
Main Screen

DEFINITION

The VISUAL PLANNING Main Screen provides access to all features of the tool. It is according to user rights.

LIST OF THE WINDOW ELEMENTS

Quick Access Toolbar

The Quick Access bar is located on the left top of the screen.

It allows to access to different usual functions in term of appearance and functioning.

cf. Quick Access Toolbar
Menu bar

The **Menu bar** can be seen in the **Main Screen**.

Horizontally oriented, it breaks down into sub menus containing blocks.

The visibility of the blocks depends on the element previously selected and on the users' rights.

These blocks disappear when the user's rights forbid their use.

The elements of the blocks are gray-colored when they are incongruous.

cf. Menu bar

Windows

The windows which can be moved, handled in the planner are:

1. Customizable **views** allow you to see resources and events in several ways:
   - **Schedule view**
   - **Diary view**
   - **Resource view**
   - **Event view**
   - **Event reports view**
2. The management window for **Global settings**
3. The management window for **Icon album**

The layout of these windows are very customizable. (cf. **Layout view**)

Other windows exist in the tool but are visible only on user action:

- Warning, **constraint** and information messages.
- Event, resource and link windows
- **Tooltip**

Status Bar

Located under the schedule, this bar shows:

- the name of the favorite display
- the name of the group of the user,
- the installed modules
- the number of connected users
- the current date and time
Favorite display

This is the name of the Favorite display.

Group

By positioning the cursor on the group icon, a tooltip comes up with the installed groups. An orange lock shows the appartenance to a group.

If the user is using the “admin” login or if he is connected as a planner administrator, there is no orange lock. No permission are applied.

Modules

By positioning the cursor on the module icon, a tooltip comes up with the installed modules.

- If the planning meets the requirements of the module, its name is black.
- If the planning does not meet the requirements of the module, its name is red.

Users

Double clic on the blue icon about the connected users.

A new window appears with all the connected users and their characteristics.
Contextual menus

When you **Right click on an item in the main screen**, a context menu appears.

This menu allows quick access to actions permitted by this object.
cf. Context menus

main, screen, display
Quick access bar

DEFINITION

The Quick Access bar is located on the left top of the screen.

It allows to access to different usual functions in term of appearance and functioning.

LIST OF THE FUNCTIONS

This menu allows to access to the following functionalities:

Refresh

This button allows to refresh eventual updates from other users.

cf. Refresh

Undo / Redo

These buttons allows to undo / redo the modifications that were done by an user during a VISUAL PLANNING session.

cf. Undo / Redo

Favorite displays
This button allows to access to all the favorite displays that the user can see, by a single click.

**Preference**

![Preference Settings](image)

**Show / Hide the Menu bar**

It allows to open or close the visualization of the Menu bar.

**Hide all views**

This functionality allows to close all the opened views.

**Language**

It concerns the language of the interface. It can be chosen between the following languages:

- Default
- Français
- English-US
- English-UK
- Deutsch
- Español
- Italiano
**Skin**

It concerns the color of the interface. It can be chosen between the following skins:

<table>
<thead>
<tr>
<th>Skin</th>
<th>Skin</th>
<th>Skin</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dark Office</td>
<td>Nebula</td>
<td>Nebula</td>
</tr>
<tr>
<td>Silver Office</td>
<td>NebulaBrickWall</td>
<td>NebulaBrickWall</td>
</tr>
<tr>
<td>Blue Office</td>
<td>Sahara</td>
<td>Sahara</td>
</tr>
<tr>
<td>Business</td>
<td>MistSilver</td>
<td>MistSilver</td>
</tr>
<tr>
<td>Creme</td>
<td>AquaSilver</td>
<td>AquaSilver</td>
</tr>
<tr>
<td>Moderate</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

This property is saved in favorite display

cf. color

**Show / Hide the Menu bar**
This functionality allows to run VISUAL PLANNING in windowed mode.

Showing the Menu bar will load the following interface:

Hiding the Menu bar will load the following interface:

To enable this functionality VISUAL PLANNING must be relaunched.

**Refresh delay**

This is the automatic time for updating window:

It can be:

- 1 minute
- 2 minutes
- 5 minutes
- 10 minutes
- 15 minutes
- 30 minutes
- 1 heure

This delay functions in addition to the manual refreshment.

**Change password**

This functionality allows to change the password of the connected user.

By choosing Change password, the following window comes up:
The user should fill the fields with the previous and the new password.

**About VISUAL PLANNING**

This menu displays the properties of the session and allow to view the Client log display.

The following window comes up:

This window contains two tabs:

- Settings
• Additional modules

It also contains three buttons and a checkbox:

• Show log
• Send log ...
• Check for update
• Check for an update on startup

cf. Client log display and build

Settings tab

![About VisualPlanning...](https://i.imgur.com/3Q5Q5Q5.png)

• This tab display the following informations:
  • Serial number and Build
  • Location of the installation of VISUAL PLANNING
  • Type of database
  • Version of Java
  • Information system and memory
  • Windows Session
  • Login VISUAL PLANNING

Additional modules tab
This tab is convenient only for version ENTERPRISE

This tab display the list of installed modules. For each module, there are:

- The module name,
- The Build number of this module,
- The license number of this module,
- Validate the planner and functional prerequisites for this module.

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View

DEFINITION

A view is a representation of the datas of VISUAL PLANNING.

Five types of view are available:

- The **Schedule view**. It allows to view the resources of a dimension and their events on a horizontal schedule.
- The **Diary view** allows to view the events of one or several resources as a diary.
- The **Events view** allows to view the events as a list of events or tasks.
- The **Resources view** allows a visual representation of resources. It is offently used as a rack of resources to assign on the planner.
- The **Events reports view** allows to view the result of an Events report.

CHARACTERISTICS

According to the type, a view stocks:

- The height of the lines (Schedule view);
- The width of the resources columns (Schedule view);
- The width of the Time scale columns;
- The time scale (Schedule view, Diary view);
- The wording of the duration bar, the tooltips (Schedule view);
- Different options of the Schedule view (Weekends, non working days, night hours, ...);
- The filters;
- ...

USE

c.f. General overview of the user interface

Layout of the views

The views are a part of the dashboard called **Favorite display**.

It can be positioned as wanted in **Main Screen**.
cf. Layout of the views

Printing a view

It is possible to print a view with all its features.

cf. Print a view

Synchronization of the views

Several views can be synchronized together according to criteria of:

- filter
- date
- scale

The synchronization of the views works by setting characteristics on which the view will depend on the other views. A “slave” view must be defined.

On two views, to run this synchronization in both directions, the synchronization must be set in each view.

Exemple:

To define that a view A is synchronised on the filters means that:

If the filters applied on another view B are modified, the, these new filters are applied on the view A too.

Synchronization settings

- Resources view: Synchronization tab,
- Diary view: Synchronization tab,
- Events view: Synchronization tab,
- Schedule view: Synchronization tab.

view, display
Schedule view

DEFINITION

The schedule view represents the planner of a group of resources which belongs to a given dimension on a horizontal planner grid.

There are other types of views. cf. View

SETTINGS

cf. Settings of a View

LIST OF DISPLAY SETTINGS

cf. Display settings of a Schedule View

USE

cf. General overview of the user interface
cf. Use a Schedule View
view, display, planner, event, schedule, resource
Settings of a View

This document is valid for the following types of views:

- Schedule view
- Resources view
- Events view
- Diary view

For the Events report view: cf. Events report view

Create a view

To create a view, you can either go to Global settings, either to Predefined views, both in the Settings tab.

Global settings panel is only available for the administrator of the planner.

There are several possibilities of creating a view:

- Go to Global Settings > Right-click on a Dimension > Create a view > Choose the type

- Or go to Global Settings > Right-click on Predefined views > Create a view > Choose the type
- Or go to Global Settings > Right-click on Predefined views > Duplicate existing view
- Or in Settings menu > Predefined views > Create a view > Choose the type

The entry points are described in this page: General overview of the user interface

The following window appears:
Fill in the features below, then click on the **OK** button to create the view.

These features are:

**Dimension**

Select the dimension which contains the resources that will lead the view.

**Name**

Give a name to the view. It is required.

**Description**

Give a description to the view. It is optional.
Modify a view

To modify a view, change any Display settings of the view.

Then, it is convenient to save the modifications made. You can save it:

**Case 1 : Predefined views**

This menu is available for all users who have the right to edit favorite displays.

In addition, the view must be selected before recording.

Go to the menu Settings > Predefined views > Save button

The following window comes up:

This window allows you to change:
**Case 2 : Global Settings**

Global settings panel is only available for the administrator of the planner.

Go to the Settings menu > Global settings > Predefined view

The following window appears:
Then:

- Click on **OK** to validate your changes;
- Or Click on **Restore** to restore the display settings prior to the modifications made.

**Delete a view**

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

To delete a view, there are two possibilities.

**Case 1 : Predefined views**

This menu is available for all users who have the right to edit favorite displays.

In addition, the view must be selected before recording.

**Go to the Global settings > Predefined views > Right-Click on the view > Delete.**
The following message appears:

Then:

- Click on **Yes** to definitely delete the view;
- Click on **No** to maintain the view.

**Case 2 : Global settings**

The global settings panel is only available by the administrator of the planner.

Go to the menu **Settings > Global settings > Predefined views > Right-click on the view you want to delete > Delete.**

The following message appears:
Then:

- Click on **Yes** to definitely delete the view;
- Click on **No** to maintain the view.

`view, display, settings`
Resources view

DEFINITION

A Resources view is a view that allows to visualize a group of resources that belong to the same dimension.

This type of view can be considered as a “Rack” of resources usable to create events on another view.

The resources view can be displayed in several modes:

- Details Mode
- Icons Mode
- List Mode
- Table Mode

SETTINGS

cf. Settings of a View

LIST OF DISPLAY SETTINGS

cf. Display settings of a Resources View

USE

cf. General overview of the user interface

cf. Use a Schedule View
view, display, resources
Display settings of a Resources View

This page lists all the settings to display a Events view.

The parameters of the other views are available on the following pages:

- Display settings of a Schedule View
- Display settings of an Events View
- Display settings of a Diary View
- Display settings of an Events Report View

Access

There are two possibilities to configure the display settings of a Resources view:

- Go in the Global settings > Click on Predefined view > Choose the view > Display settings
- Right-click on the button which is located in the heading of the view.

In both case, a window appears.
Modify the settings, then click on **OK** to confirm.

There are three tab :

- **Resources tab**
- **Printing tab**
- **Synchronization tab**

### Resources tab

This tab allows you to define the display format of the view.

### Display mode

There are four display modes for the resources view:

- Details,
- Icon,
• List,
• Table.

### Position

This list allows to align the resources:

- vertically
- or horizontally

The table mode does not have this feature.

### Font

It is possible to choose a font for visualizing the resources.
Ascending sort

Check this box allows to sort the resources in alphabetical order.

Uncheck this box allows to sort the resources in reverse alphabetical order.

Sort by

It is necessary to choose a heading according to those in the dimension of this resources view.

In table mode, this symbol appears on the header of the sorted heading.

Main heading

The main heading is the one that identify the resource.

The table mode does not have this feature.

Group by

It can be useful to group the resources by a category.

This category is defined by one of the headings of the dimension.

The table mode does not have this feature.

Display short names

This functionality exists only in table mode view.
When resource type headings exist, and this case is checked, the name of the reference dimension for the headings is hidden. When not checked, the name of the reference dimension of the resource type headings is shown in the table.

**Description headings**

The description headings are only useful in details mode and in table mode. The details mode allows to view several headings in the form of a description of the resource.

The headings are chosen among:

- the headings of the dimension,
- the headings of the dimensions linked to the resource via resource type headings,
- the resource settings (hourly, daily calendars, events creation rule),
- the resource historical attributes,
- Forum attributes (date last post and user last post).

The button allows to open the following window:
Then, choose in the left window the headings to be displayed using the crossing arrows:

It is also possible to sort the headings via the sorting arrows:

The table mode does not have this feature.

**Separator**

If there are several headings for the description, one or several characters can be used to separate the headings.

The table mode does not have this feature.
Sort the default editor

This check box concerns the Default resources input editor. It allows sorting the headings in the editor:

- if unchecked, the headings are sorted according to the settings of the dimension (i.e. Global settings),
- if checked, the headings are sorted according to the display settings of the view, for visible headings and then according to the settings of the dimension, for non-visible headings.

For more information on the “Resources input editor”, see Layout and Visualization > Resources Input Editor.

Background color

It is possible to add a background color to the resources.

This color may be:

- the color of the resource,
- or the color of a depending resource, in case of a Resource heading,
- or the color of a heading with a Threshold (control column or operation heading),
- or the color of a event value heading.

Warning

You can only choose a persistent heading.

Visual

This list allows to display the symbol of the resources by the colors or by the icons.

The table mode does not have this feature.

Display totals

In a table mode, it is possible to display totals for the resources' headings, for all numerical, control column and operation type headings.
Only the table mode has this feature.

**Show icons**

In a table mode, it is possible to show the icons of the resources.

Only the table mode has this feature.

**Show lines numbers**

In a table mode, it is possible to show the line numbers of the resources.

Only the table mode has this feature.

**Printing tab**

![Printing tab image]

In the printing tab, you can specify which resources are included in the print and adjust the settings for specific resources.
This tab allows to define the printing settings for the view. (c.f. Print a view)

**Adjusting**

It permits to adjust the print to the page, the height, the width.

The height of rows is adjusted to the maximum height of the existing rows.

Only table mode allows adjustment. This concerns:

- Event view, Table mode
- Resource view, Table mode
- Event report view, Table mode

**Footer**

It permits to define the page footer of the print:

![Footer example](image)

The following buttons allow to define predefined informations:

- ![Page number](image)
- ![Number of pages](image)
- ![Date of printing](image)
- ![Time of printing](image)
- ![Name of the planner](image)
- ![Name of the view](image)
- ![Name of the user](image)
- ![Name of the group](image)

It is also possible to directly fill a specific text by entering directly into the desired zone
Header

It permits to define the page header of the print:

![Edition window]

The following buttons allow to define predefined informations:

- ![Page number]
- ![Number of pages]
- ![Date of printing]
- ![Time of printing]
- ![Name of the planner]
- ![Name of the view]
- ![Name of the user]
- ![Name of the group]

It is also possible to directly fill a specific text by entering directly into the desired zone

Page Settings

The following window appears where you can define the default **page setting** for the selected view.
In this window, you specify the characteristics of the layout.

This definition of the page settings can be saved as a favorite display.

It should then click on **OK** to confirm.

**Show logo**

Check this box allows to display the logo at the top left in the print result.

**Select logo**

The logo is an image file that can be displayed in the print result.

This image is unique for all the planning.

Click on [...] to browse the folders and select an image file.
Synchronization tab

Resources filters

It is possible to synchronize the Resources filter according to the filters of the other views.

cf. Synchronization of the views

1) the filters of the same dimension
**Events view**

**DEFINITION**

An *Events view* is a list that recapitulates all the events of one or several resources.

It is a vertical list where the events are chronologically or anti-chronologically sorted. It is like a “tasks list”.

This list of events can be seen in two manners:

- In the properties of a resource: *Events tab*
- In a dedicated view : The Events view that is treated here

![Events view](image)

**SETTINGS**

cf. *Settings of a View*

**LIST OF DISPLAY SETTINGS**

cf. *Display settings of an Events View*
USE

c.f. General overview of the user interface

c.f. Use an Events View

view, display, list, event
Display settings of an Events View

This page lists all the settings to display an Events view.

The parameters of the other views are available on the following pages:

- Display settings of a Schedule View
- Display settings of a Resources View
- Display settings of a Diary View
- Display settings of an Events Report View

Access

There are two possibilities to configure the display settings of an Events view:

- Go in the Global settings > Click on Predefined view > Choose the view > Display settings:

  - **Right-click** on the button which is located in the heading of the view.

In both case, a window with three tabs appears.

Events list tab
The settings that are taking into account are:

**Display mode**

An Events view can be in the form of:

- **Details**
- **Table**
**Period**

Define the period on which will be displayed the events:

- Free
- Day
- Week
- Month
- Year

**Display planner**

This checkbox display a planning:

Two news tabs also appear in the display settings:

- Schedule
- Event

This option is useful only with the table mode.
Dimensions colors

One or more dimensions can determine the color of the events.

The button allows to open the following window:

Then, choose in the left window the wordings that must appear in the pop-ups and slide them into the right via the passing arrows.

The color of the dimensions on the event can be sorted via the arrows of sort

Display short name

This check box gives the option of showing or not showing the dimensions' headings for the displayed headings.
Dimensions icons

The icons can represent one or more resources of the dimensions.

The button allows to open the following window:

![Dimensions icons window]

Then choose in in the left window the wordings that must appear in the pop-ups and slide them into the right via the passing arrows.

![Passing arrows]

The informations of the dimensions on the duration bar can be sorted via the arrows of sort

![Sort arrows]

Labels

One or several headings can be seen for each event.

The button allows to open the following window:
Then choose in the left window the labels that must appear in the tooltips and slide them into the right via the passing arrows.

The labels of the dimensions can be sorted via the arrows of sort.

**Fonts**

By clicking the [...] button, the window for defining the font comes up:
You can choose:

- a font
- style (bold, italic)
- a size

**Schedule tab**

This tab is displayed only with **table** mode and if **Display planner** is checked.

This tab is dedicated to set the features of the schedule grid:
Daily calendar

It consists in choosing among the existing daily calendars the one which will define the background colour of the planning grid. It is also possible to create a new daily calendar by clicking on this button:

This calendar is not necessarily the calendar of one or more resources of the view.

Hourly calendar

It consists in choosing among the existing hourly calendars the one which will define the background
The colour of the planning grid. It is also possible to create a new hourly calendar by clicking on the button:

This calendar is not necessarily the calendar of one or more resources of the view.

**Column width**

The numeric value that is seized here corresponds to the width (in pixels) of each column of the planner grid.

**Font**

By clicking the [...] button, the window for defining the font comes up:

![Pick a font](image)

You can choose:

- a font
- style (bold, italic)
- a size

**Set to the current date**

Check this box to set the favorite display opens to the current date.
Time scale

Select the time scale of the view.

Scroll

It is possible to define the scrolling method of the view when the scrolling arrows are used.

The different possibilities are:

- Free: the schedule acts as a perpetual and continuous strip,
- Day: the schedule is only visible day by day. The view always represents a whole day.
- Week: the schedule is visible week by week. The view always represents a whole week.
- Month: the schedule is visible month by month. The view always represents a whole month.
- Year: the schedule is visible year by year. The view always represents a whole year.

Display hourly calendars

This check box allows to choose if the hourly calendars must be seen or not.

Non working days

This check box, if it is checked, allows to display the days that are defined as non working into the type of period.

Night hours

This check box allows to display or not the night hours.

These night hours are determined by the start hour and the end hour that are defined below.

Vertical grid

This check box allows to show or not the vertical grid on the planner.
Display weeks

This check box allows to display or not the weeks in front of the date on the planner. This option is useful when the time scale is in days or more.

Start hour

It is the first hour of the day on the planner.

This start hour is useful when the Display the night hours option is inactivated.

This start hour has no association with the hourly calendars.

End hour

It is the last hour of the day on the planner.

This end hour is useful when the Display the night hours option is inactivated.

This end hour has no association with the hourly calendars.

Background color

It is possible to choose the background color of the view.

This color concerns the days and the hours which have a non-coloured type of period.

This choice also applies on the background color of the resources if nothing is specified.

Display links

This check box allows to determine if the links between events must be displayed in the view or not.

Most of these properties are also availables in the Menu Bar or with *Right click on the schedule header*.
Events tab

This tab is displayed only with table mode and if Display planner is checked.

This tab consists in the settings of the duration bar:

![Configuration - Event view Dimension 1](image)

The settings are:

**Dimension for border color**

https://www.visual-planning.com/doc/ Printed on 2017/11/10 10:44
This list allows to choose the resources of the dimension that will define the boarder color of the duration bar on the schedule.

The button allows to edit a dimension in order to modify his colour.

**Border thickness**

It is possible to specify the border thickness by modifying the numeric value of this thickness.

**Dimensions for background color**

The background color of the duration bar can be:

- default color
- plain if only one dimension is chosen
- multicoloured if several dimensions are chosen

The button allows to open the following window:
Then, choose in the left window the wordings that must appear in the pop-ups and slide them into the right via the passing arrows.

The color of the dimensions on the duration bar can be sorted via the arrows of sort.

**Fixed height**

Check this box to give to all the events the same height than the row.

**Font**

By clicking the [...] button, the window for defining the font comes up:
You can choose:

- a font
- style (bold, italic)
- a size

**Text on duration bars**

To access to the choice of the datas, **Click on [...] in front of Text on Duration bars**. All the datas that are in VISUAL PLANNING appear in the window.

The drop down list allows to filter by type the available entities.
To add an entity, **Select the entity** in the left part, and slide it into the right part via the passing arrows.

It is also possible to sort the datas on the duration bar via the arrows of **sort**.

**On one line**

This check box allows to define if the wording must be displayed:

- On one line: the check box is checked
- All the labels on the same line: the check box is unchecked

**Separator**

When all texts are on the same line, a separator is required.
Display titles

This check box allows to display the name of the texts on the duration bar, if it is checked.

Position

The position of the texts compared with the duration bar can be choosed.

The possible choices are:

- Left,
- Right,
- Center,
- External. In this case, the texts are visible outside the duration bar, on the right.

Always visible

Check this box to display the icon even if the duration bar is smaller than the icon.

Position of icons

One or more icons can be displayed on the duration bar.

These icons can be aligned:

- on the left
- or on the right of the duration bar

Dimensions of icons

One or more dimensions can be chosen to display the icons of the events.

The window:
Then, choose in the left window the wordings that must appear in the pop-ups and slide them into the right via the passing arrows.

The icon of the dimensions on the duration bar can be sorted via the arrows of sort.

**Display the Progress bar**

To display the progress state on the duration bar, check this box.

**Progress color**
By a **right-click on the color**, the color of the progress bar can be modified.

The **colour pallet** is then opened.

**Position of the bar**

This choice list allows to define the position of the progress bar on the duration bar.

The choices are:

- High
- Center
- Low

**Urgent color**

![Urgent color image]

The Urgent color represents the urgence state of the event.

It is visible:

- as the color of the progress bar
- or as the edge color

It is only useful if the **realisation** of the events is manually done. Indeed, the automatic realisation mode has no urgent event.

The color of the urgence state can be modified via a **right-click on the color**.

The **colour pallet** is then opened.

**Tooltips as duration bars**

It is possible to display the same informations on the duration bar and in the **tooltips**.

By **unchecking** this box, the informations that are posted in the pop-ups can be different from those which are on the duration bar.

**Texts of tooltips**
If the previous box is unchecked, it is possible to modify the texts of the tooltips.

The button allows to open the following window:

![Properties edition window]

Then, choose into the left window the entities to display in the tooltips by sliding them from the left to the right via the passing arrows.

The texts in the tooltips can be sorted via the arrows of sorting.

Printing tab

Printing a view works in a similar manner to the concept of WYSIWYG.¹
The printing parameters of this view is:

**Adjusting**

It permits to adjust the print to the page, the height, the width.
The height of rows is adjusted to the maximum height of the existing rows.

Only table mode allows adjustment.

**Footer**

It permits to define the page footer of the print:

![Footer edit](image)

The following buttons allow to define predefined informations:

- Page number : &[Page]
- Number of pages : &[Pages]
- Date of printing : &[Date]
- Time of printing : &[Hour]
- Name of the planner : &[Planning]
- Name of the view : &[View]
- Name of the user : &[User]
- Name of the group : &[Group]

It is also possible to directly fill a specific text by entering directly into the desired zone

**Header**

The header parameters are the same than the **footer**.

![Header edit](image)
**Page setting**

It permits to set the page setting of the printing document:

![Page Setup dialog box](image)

In this window, you specify the characteristics of the layout and in particular:

- The paper size (A4,A3...)
- The printing source
- The paper orientation (portrait ou paysage)
- The margins

It should then click on OK to confirm.

**Show logo**

Check this box allows to display the logo at the top left in the print result.

**Select logo**

The logo is an image file that can be displayed in the print result.

Click on [...] to browse the folders and select an image file.
You can reach your icon file and click the open button.

**Synchronization tab**

The synchronization of a view consists in defining the different features that will be dependent on the other views.
Different options are possible:

**Events and Resources filters**

Choose the filters that must be synchronized with the filters of the other views.

This choice can be done for each existing type of filter.

1) **What you see is what you get**
Display settings of a Schedule View

This page lists all the settings to display a Events view.

The parameters of the other views are available on the following pages:

- Display settings of a Resources View
- Display settings of an Events View
- Display settings of a Diary View
- Display settings of an Events Report View

Access

To configure the display settings of a Schedule view:

- Go in the Global settings > Click on Predefined view > Choose the view > Display settings:
- **Right-click** on the button which is located in the heading of the view.

In both case, a window appears.

**Events tab**

This tab consists in the settings of the duration bar.
The settings are:

**Dimension for border color**

This list allows to choose the resources of the dimension that will define the border color of the
duration bar.

The button allows to edit a dimension in order to modify his colour.

**Border thickness**

It is possible to specify the border thickness by modifying the numeric value of this thickness.

**Dimensions for background color**

The background color of the duration bar can be:

- plain if only one dimension is chosen
- multicoloured if several dimensions are chosen

The button allows to open the following window:
Fixed height

Check this box to give to all the events the same height than the row.

Font

By clicking the [...] button, the window for defining the font comes up:
You can choose:

- a font
- style (bold, italic)
- a size

**Text on duration bars**

To access to the choice of the datas, **Click on [...] in front of Text on Duration bars**. All the datas that are in VISUAL PLANNING appear in the window. The drop down list allows to filter by type the available entities.

To add an entity, **Select the entity** in the left part, and slide it into the right part via the passing arrows.

It is also possible to sort the datas on the duration bar via the arrows of **sort**.
On one line

This check box allows to define if the wording must be displayed:

- On one line: the check box is checked
- All the labels on the same line: the check box is unchecked

Separator

When all texts are on the same line, a separator is required.

Display titles

This check box allows to display the name of the texts on the duration bar, if it is checked.

Position

The position of the texts compared with the duration bar can be choosed.

The possible choices are:

- Left,
- Right,
- Center,
- External. In this case, the texts are visible outside the duration bar, on the right.

Always visible

Check this box to display the icon even if the duration bar is smaller than the icon.

Position of icons

One or more icons can be displayed on the duration bar.

These icons can be aligned:

- on the left
- or on the right of the duration bar
Dimensions of icons

One or more dimensions can be chosen to display the icons of the events.

The window:

To do so, just slide them from the left to the right via the arrows:

Linked Event Filter

It is possible to display the linked events of dependant dimensions.

The choice of an event filter allows to select the events to display from the selected dimensions of the resource's headings of the dimension of the view.

The possible choices are :

• (All),
Display extra events

To display extra events, it is necessary to choose the resource's headings belonging to the active schedule view.

Display the Progress bar

To display the progress state on the duration bar, check this box.

Progress color

By a right-click on the color, the color of the progress bar can be modified.

The colour pallet is then opened.

Position of the bar

This choice list allows to define the position of the progress bar on the duration bar.

The choices are:

- High
- Center
- Low

Urgent color
The Urgent color represents the urgence state of the event.

It is visible:

- as the color of the progress bar
- or as the edge color

It is only useful if the realisation of the events is manually done. Indeed, the automatic realisation mode has no urgent event.

The color of the urgence state can be modified via a right-click on the color.

The colour pallet is then opened.

### Tooltips as duration bars

It is possible to display the same informations on the duration bar and in the tooltips.

By unchecking this box, the informations that are posted in the pop-ups can be different from those which are on the duration bar.

### Texts of tooltips

If the previous box is unchecked, it is possible to modify the texts of the tooltips.

The ➕ button allows to open the following window:

```
Then, choose into the left window the entities to display in the tooltips by sliding them from the left to the right via the passing arrows.
```
The informations of the datas on the duration bar can be sorted via the arrows of sorting.

Labels sorting

It is possible to sort the events of a resource according to one or several selected heading(s).

<table>
<thead>
<tr>
<th>Sorting</th>
<th>Ascending sort</th>
<th>Labels sorting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>[✓]</td>
<td></td>
</tr>
</tbody>
</table>

Ascending sort

Once checked, this check box determines an ascending sort of the events. If not checked, the events is in a descending order.

Schedule tab

This tab is dedicated to set the features of the schedule grid.
Daily calendar

It consists in choosing among the existing daily calendars the one which will define the background colour of the planning grid. It is also possible to create a new daily calendar by clicking on this button:

This calendar is not necessarily the calendar of one or more resources of the view.

Hourly calendar

It consists in choosing among the existing hourly calendars the one which will define the background
colour of the planning grid. It is also possible to create a new hourly calendar by clicking on the button:

This calendar is not necessarily the calendar of one or more resources of the view.

**Column width**

The numeric value that is seized here corresponds to the width (in pixels) of each column of the planner grid.

**Font**

By clicking the [...] button, the window for defining the font comes up:

![Pick a font](image)

You can choose:

- a font
- style (bold, italic)
- a size

**Set to the current date**

Check this box to set the favorite display opens to the current date.
**Time scale**

Select the *time scale* of the view.

**Scroll**

It is possible to define the scrolling method of the view when the scrolling arrows are used.

The different possibilities are:

- Free: the schedule acts as a perpetual and continuous strip,
- Day: the schedule is only visible day by day. The view always represents a whole day.
- Week: the schedule is visible week by week. The view always represents a whole week.
- Month: the schedule is visible month by month. The view always represents a whole month.
- Year: the schedule is visible year by year. The view always represents a whole year.

**Display hourly calendars**

This check box allows to choose if the hourly calendars must be seen or not.

**Non working days**

This check box, if it is checked, allows to display the days that are defined as *non working* into the *type of period*.

**Night hours**

This check box allows to display or not the night hours.

These night hours are determined by the start hour and the end hour that are defined below.

**Vertical grid**

This check box allows to show or not the vertical grid on the planner.
Display weeks

This check box allows to display or not the weeks in front of the date on the planner. This option is useful when the time scale is in days or more.

Start hour

It is the first hour of the day on the planner.

This start hour is useful when the Display the night hours option is inactivated.

This start hour has no association with the hourly calendars.

Period

Each schedule view is circumscribe by a start date and an end date.

Choose the Time Period that defines the left and right limits of planner.

It can be fixed or variable borders according to the current date.

No events located outside this period can be visible in the view.

End hour

It is the last hour of the day on the planner.

This end hour is useful when the Display the night hours option is inactivated.

This end hour has no association with the hourly calendars.

Background color

It is possible to choose the background color of the view.

This color concerns the days and the hours which have a non-coloured type of period.

This choice also applies on the background color of the resources if nothing is specified.
Display links

This check box allows to determine if the links between events must be displayed in the view or not.

Only lines with events

In a schedule view with a non-free scroll, once checking this check box, the user will visualize only the resources having at least one event in the chosen period.

Most of these properties are also available in the Menu Bar or with *Right click on the schedule header*.

Printing tab
This tab define display settings of the view. (cf. Print a view)

**Number of periods per page**

It is the **Number of periods per page** which will be displayed.

**Time by page**

It is the **period type** that will be used (hour, day, week, month,...).
Restrict to events

When checked, the check box allows the limitation of the printing to only the period containing events. The period of time not containing events will not be printed. E.g. if the period to be printed is one year, but the events cover only a part of the year, only that part will be printed.

Period

It is the period of data printing.

Footer

It permits to define the page footer of the print:

The following buttons allow to define predefined informations:

- Page number
- Number of pages
- Date of printing
- Time of printing
- Name of the planner
- Name of the view
- Name of the user
- Name of the group

It is also possible to directly fill a specific text by entering directly into the desired zone

Header

It permits to define the page header of the print:
The following buttons allow to define predefined informations:

- Page number
- Number of pages
- Date of printing
- Time of printing
- Name of the planner
- Name of the view
- Name of the user
- Name of the group

It is also possible to directly fill a specific text by entering directly into the desired zone

**Page break on heading**

It permits to print row by row thanks to the resources heading sort.

**Page settings**

The following window appears where you can define the default page setting:
In this window, you specify the characteristics of the layout.

This definition of the page settings can be saved as a favorite display.

It should then click on **OK** to confirm.

**Show logo**

Check this box allows to display the logo at the top left in the print result.

**Select logo**

The logo is an image file that can be displayed in the print result.

This image is unique for all the planning.

Click on [...] to browse the folders and select an image file.
Resources rows tab

All headings

This check box allows to display or not the headings of the resources.

Headings
If the previous box is unchecked, choose the headings to be displayed. The list also contains the history attributes of the resources.

The headings are chosen among:

- the headings of the dimension,
- the headings of the dimensions linked to the resource via resource type headings,
- the resource settings (hourly, daily calendars, events creation rule),
- the resource historical attributes,
- Forum attributes (date last post and user last post).

The button allows to open the following window:

Then, choose in the left window the headings to be displayed using the crossing arrows:

It is also possible to sort the headings via the sorting arrows:
**Ascending sort**

This check box allows to:

- do an ascending sort on the headings, if checked.
- do a decreasing sort on the headings, if unchecked.

**Sort the default editor**

This check box concerns the Default resources imput editor. It allows sorting the headings in the editor:

- if unchecked, the headings are sorted according to the settings of the dimension (i.e. Global settings),
- if checked, the headings are sorted according to the display settings of the view, for visible headings and then according to the settings of the dimension, for non-visible headings.

For more information on the “Resources imput editor”, see Layout and Visualization > Resources imput editor.

**Background color**

It is possible to add a background color to the resources.

This color may be:

- the color of the resource,
- or the color of a depending resource, in case of a Resource heading,
- or the color of a heading with a Threshold (control column or operation heading),
- or the color of a event value heading.

**Warning**

You can only choose a persistent heading.

**Font**

By clicking the [...] button, the window for defining the font comes up:
You can choose:

- a font
- style (bold, italic)
- a size

**Display icons**

This check box allows to display or not the icons of the resources.

**Display rows numbers**

This check box allows to choose if the lines numbers of the resources must be displayed in the left of the planner or not.

**Display short names**

This check box gives the option of showing or not showing the dimensions' headings for the resources displayed headings.
Most of these properties are also availables in the menu affichage or with *Right click on the schedule header*.

**Workloads tab**

![Workloads Tab](image)

The workloads are potentially visible in the planner view.

The following features can be defined:
Display total

If this box is checked, an additional workload is shown that is the sum of visible workloads.

Display workloads

The check box *Display workloads* allows to choose if the workloads must be added to the view or not.

Workloads

*It consists in defining the workloads to be displayed or not.*

Synchronization tab
The synchronization of the view consists in defining the features which will be dependent on the other views.

The following possibilities are:

**Date**

This check box allows to synchronize the planner date with the date of the other views.

The date of the planner is the date of the small calendar of the view.
Time scale

This check box allows to synchronize the time scale of the view with the time scale of the other views.

Filters

It consists in choosing the filters which will be synchronized with the filters of the other views.

This choice can be done for each type of existing filter.

view, display, planner, event, schedule, resource
Display settings of a Diary View

This page lists all the settings to display a Events view.

The parameters of the other views are available on the following pages:

- Display settings of a Schedule View
- Display settings of a Resources View
- Display settings of an Events View
- Display settings of an Events Report View

Access

There are two possibilities to configure the display settings of a diary view:

- Go in the Global settings > Click on Predefined view > Choose the view > Display settings:

  ![View](View.png)

  - Right-click on the button which is located in the heading of the view.

In both case, a window with four tabs appears:

- Diary tab
- Events tab
- Printing tab
- Synchronization tab
Diary tab

This tab is dedicated to the settings of the planner grid.

![Configuration - Dimension 1](image)

The settings that are taking into account are:

**Daily calendar**

Choose, among the existing daily calendars, the one which will lead the background colour of the diary grid.

This calendar is not necessarily the calendar of the resources on the view.
**Hourly calendar**

Choose, among the existing hourly calendars, the one which will lead the background colour of the diary grid. It is also possible to create a new calendar by clicking on the button. This calendar is not necessarily the calendar of the resources on the view.

**Font**

The font of the header can be modified in this field.

**Display mode**

The Diary view has always the days horizontally and the hours vertically.

There are three display modes of the Diary view. These modes allow to refine the signification of the column of the view:

- **Daily** Mode, (the view contains only one column, the column of the treated day)
- **Weekly** Mode, (the view contains seven columns corresponding to the days of a week - monday to sunday)
- or **Finely worked week** Mode, (the view contains five columns corresponding to the finely worked days of a week - monday to friday)

Within a monthly Diary view, maximum three duration bar are displayed. The effect is a superposition of events.

**Display hourly calendars**

This checkbox allows to choose if the hourly calendars must be visible or not.

**Non working hours**

This checkbox, if checked, allows to show the hours of which the type of period is non working.

**Start Hour**
It is the first hour of the day displayed in the planner.

This start hour is useful when the **Non working hours** option is deactivated.

This start hour has no link with hourly calendars.

**End Hour**

It is the last hour of the day displayed in the planner.

This end hour is useful when the **Non working hours** option is deactivated.

This end hour has no link with hourly calendars.

**Background color**

It is possible to choose the background colour of the view.

This colour is applied to the days and hours which belong to the period type without any colour.

**Events tab**

This tab is dedicated to the **duration bar** settings.
The settings that are taken into account in the duration bar display are the listed below.

**Dimension for border color**

This list allows to choose the dimension which will lead the border color of the duration bars.
Border thickness

The border thickness can be specified by modifying the numeric value of the thickness.

Dimension for background color

The background color of the duration bar can be:

- united if only one dimension is chosen for the color
- multicoloured if several dimensions are chosen for the color.

The button opens the following window:
Fixed height

Check this box to give to all events the same height.

Font

By clicking on the left button, the setting window of the font is opened.

Text on duration bars

To choose the entities to be displayed, Click on [...] on the Text on duration bars field. All the entities of VISUAL PLANNING are listed in the window that appears.

The drop down list allows to filter by type the available entities.
To add an entity, **Select the entity** in the left part and move it to the right part via the passing arrows.

It is possible to sort the datas on the duration bar via the **sort** arrows.

Only one label would be displayed in duration bar even if many properties are selected.

**Display titles**

This checkbox, if checked, allows to display the titles of the wording on the duration bar.

**Position**

It is possible to choose the position of the texts relative to the duration bar.

The different choices are:
• Left,
• Right,
• Center,
• Extern. In this case, the texts are visible outside the duration bar, on its right.

**Always visible**

Check this box to display the icon even if the duration bar is smaller than the icon.

**Position of icons**

One or more icons can be displayed on the duration bar.

These icons can be placed:

• on the **left**
• or on the **right** of the duration bar.

**Dimensions of icons**

One or more dimensions can be chosen to carry the event icons.

The button opens the following window:
To do so, just drag&drop from the left to the right via the following arrows:

![Drag & drop arrows](image)

**Linked Event Filter**

It is possible to display the linked events of dependant dimensions.

The choice of an event filter allows to select the events to display from the selected dimensions of the resource's headings of the dimension of the view.

The possible choices are:

- (All),
- Customized,
- Select a public event filter,
- Select a private event filter.

**Display extra events**

To display extra events, it is necessary to choose the resource's headings belonging to the active diary view.
Display the progress bar

To show the progress on the duration bar, check this case.

Progress color

The color of the progress bar can be chosen by a **Left-click on the color**.

The **colour pallet** is then opened.

Urgent Color

The Urgent color represents the Urgency state of the event.

It is visible:

- in the progress bar color
- or in the border color

It is only useful when the **realisation** is a manual action. Indeed, the automatic realisation does not qualify an event as urgent.

The color of Urgency can be changed by a **Left-click on the color**.

The **colour pallet** is then opened.

Labels sorting

It is possible to sort the events of a resource according to one or several selected heading(s).

<table>
<thead>
<tr>
<th>Sorting</th>
<th>Ascending sort</th>
<th>Labels sorting</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td>[...]</td>
</tr>
</tbody>
</table>
**Ascending sort**

Once checked, this check box determines an ascending sort of the events. If not checked, the events is in a descending order.

**Tooltips as duration bars**

The informations on the duration bar can be different from those in the tooltips, by uncheking this box.

**Text of tooltips**

If the previous box is unchecked, the texts of the tooltips can be modified.

The button opens the following window:

![Properties edition window](image)

Choose in the left window the text to display in the tooltips by moving them form the left to the right via the passing arrows.

The datas can be sorted on the duration bar via the sort arrows.
Printing tab

This tab allows to define the printing settings for the view. (c.f. Print a view)

Adjusting

It permits to adjust the print to the page, the height, the width.
The height of rows is adjusted to the maximum height of the existing rows.

Only table mode allows adjustment. This concerns:

- Event view, Table mode
- Resource view, Table mode
- Event report view, Table mode

**Footer**

It permits to define the page footer of the print:

The following buttons allow to define predefined informations:

- : Page number
- : Number of pages
- : Date of printing
- : Time of printing
- : Name of the planner
- : Name of the view
- : Name of the user
- : Name of the group

It is also possible to directly fill a specific text by entering directly into the desired zone

**Header**

It permits to define the page header of the print:
The following buttons allow to define predefined informations:

- ![page number](Image)
- ![number of pages](Image)
- ![date of printing](Image)
- ![time of printing](Image)
- ![name of the planner](Image)
- ![name of the view](Image)
- ![name of the user](Image)
- ![name of the group](Image)

It is also possible to directly fill a specific text by entering directly into the desired zone

**Page Settings**

The following window appears where you can define the default page setting for the selected view.
In this window, you specify the characteristics of the layout.

This definition of the page settings can be saved as a favorite display.

It should then click on **OK** to confirm.

### Show logo

Check this box allows to display the logo at the top left in the print result.

### Select logo

The logo is an image file that can be displayed in the print result.

This image is unique for all the planning.

Click on [...] to browse the folders and select an image file.
Synchronization tab

The synchronization of a view consists in defining the characteristics which will be dependent on the other views.

- **Date**: this checkbox allows to synchronize the date of the diary with the date of the other views.
- **Filters**: this option allows to synchronize different events, resources filters to the Diary view
Display settings of an Events Report View

This page lists all the settings to display an Events report view.

The parameters of the other views are available on the following pages:

- Display settings of a Schedule View
- Display settings of a Resources View
- Display settings of an Events View
- Display settings of a Diary View

Access

To configure the Display settings of an Events report view, there are two possibilities:

- Global settings > Predefined views > Choose the view > Display settings:

  ![Event report view configuration](https://www.visual-planning.com/doc/)

  * Right-click on the button in the top right of the view.

  The following window appears:

**Events report tab**
Then, the following features can be modified:

**Automatic calculation**

This checkbox, if checked, allows to view, in real time, the impact of the changes that are done in the planner on the events report.

If this checkbox is unchecked, the refreshment of the view depends on the automatical updating of VISUAL PLANNING.

**Warning:** This feature can significantly impact the performance of the application.

**Events report**

An **Events report** is required in this view.

The events report must have been created before. If not, it is possible to create a new one via the button.
Display type

The display type defines a display in form of a table, a chart, a histogram, an area as in the following examples:

Table

2D Histogram

3D Histogram
3D Pie chart

- You can focus on all the histogramme display with Left click-slided to the low.
- You can come back to the original display with Left click-slided to the top.

**Display value labels**

In histogramme displays, if checked, this checkbox allow visualizing the values of the report calculations, directly on or on top of the report bars.

If this checkbox is unchecked, we visualize the histogramme but without the values.

**Printing tab**
This tab allows to define the printing settings for the view. (c.f. Print a view)

**Adjusting**

It permits to adjust the print to the page, the height, the width.

The height of rows is adjusted to the maximum height of the existing rows.

Only table mode allows adjustment. This concerns:

- Event view, Table mode
- Resource view, Table mode
- Event report view, Table mode

**Footer**

It permits to define the page footer of the print:
The following buttons allow to define predefined informations:

- ![page number](page.png): Page number
- ![number of pages](number.png): Number of pages
- ![date of printing](date.png): Date of printing
- ![time of printing](time.png): Time of printing
- ![name of the planner](planner.png): Name of the planner
- ![name of the view](view.png): Name of the view
- ![name of the user](user.png): Name of the user
- ![name of the group](group.png): Name of the group

It is also possible to directly fill a specific text by entering directly into the desired zone

**Header**

It permits to define the page header of the print:

The following buttons allow to define predefined informations:

- ![page number](page.png): Page number
- ![number of pages](number.png): Number of pages
- ![date of printing](date.png): Date of printing
- ![time of printing](time.png): Time of printing
- ![name of the planner](planner.png): Name of the planner
- ![name of the view](view.png): Name of the view
- ![name of the user](user.png): Name of the user
- ![name of the group](group.png): Name of the group
It is also possible to directly fill a specific text by entering directly into the desired zone.

**Page Settings**

The following window appears where you can define the default page setting for the selected view.

In this window, you specify the characteristics of the layout.

This definition of the page settings can be saved as a favorite display.

It should then click on **OK** to confirm.

**Show logo**

Check this box allows to display the logo at the top left in the print result.

**Select logo**

The logo is an image file that can be displayed in the print result.
This image is unique for all the planning.

Click on [...] to browse the folders and select an image file.
Events report view

DEFINITION

The **Events report view** allows to view an **Events Report** as a table or as a graphic in order to analyze the datas that are in the planner.

As the other views, it can be register in a **Favorite display**.

SETTINGS

Functional prerequisites

Before creating an Events report view, an **Events Report** must be created.

Create an Events report view

To create an Events report view, go to **Global settings** > **Right-Click on a dimension** > **Create a view** > **Events report**

The following window appears:
Set the following features below. Then, click on the **OK** button to create the view.

**Dimension**

Select the dimension of the resources of the view.

**Name**

It is the name of the view. It is required.

**Description**

It is an optional description of the view.

The **Events report view** window appears:
Modify an Events report view

To modify a view, change any Display settings of the view.

Then, it is convenient to save the modifications made. You can save it:

Case 1: Predefined views

This menu is available for all users who have the right to edit favorite displays.

In addition, the view must be selected before recording.

Go to the menu Settings > Predefined views > Save button

The following window appears:
This window allows you to change:

- The **Name** of the view;
- The **Description**.

cf. Create a view

Then:

- Click on **OK** to save the modifications;
- Or Click on **Cancel** to cancel the changes made.

**Case 2 : Global Settings**

Global settings panel is only available for the administrator of the planner.

*Go to the Settings menu > Global settings > Predefined view*
The following window appears:

![View window](image)

Then:

- Click on **OK** to validate your changes;
- Or Click on **Restore** to restore the display settings prior to the modifications made.

### Delete an Events report view

### Delete a view

The modification of this **entity** involves an important change in the planner's architecture. It is a powerful act of setting which should not be made without consideration. (cf. precautions to take when modifying the settings)
To delete a view, there are two possibilities.

**Case 1 : Predefined views**

This menu is available for all users who have the right to edit favorite displays.

In addition, the view must be selected before recording.

**Go to the Global settings > Predefined views > Right-Click on the view > Delete.**

The following message appears:

Then:

- Click on **Yes** to **definitely** delete the view;
- Click on **No** to maintain the view.

**Case 2 : Global settings**

The global settings panel is only available by the administrator of the planner.

Go to the menu **Settings > Global settings > Predefined views > Right-click on the view you want to delete > Delete.**
The following message appears:

Warning! This view will not be visible to favorites Displaying of its users.

Then:

- Click on **Yes** to definitely delete the view;
- Click on **No** to maintain the view.

**LIST OF DISPLAY SETTINGS**

cf. Display settings of an Events Report View

**USE**

cf. General overview of the user interface
cf. Use an Events Report View

view, display, report, event
Favorite display

DEFINITION

A favorite display is a “snapshot” of the main window of VISUAL PLANNING. It is generally associated to a usage scenario of the tool.

This is one of the most important features for end users of VISUAL PLANNING. Thanks to favorites displays, users quickly find their favorite dashboard.

A favorite display consists mainly of Views.

These are duplicates of existing views.

A favorite display stores:

- The views that are used with their location and characteristics,
- The filters that are applied.

cf. view

To optimize communication between employees on the tool, it is advisable to provide to the users a library of public favorite displays, each corresponding to a need of the planning.

It is also possible to allow users to create their own private favorite displays.

USE

Create a favorite display

To create a favorite display, Display tab > Favorite displays > button
The following window appears:

Then, fill in the following characteristics:

**Name**

Give a **Name** to this favorite display.

**Category**
Associate this favorite display with a Category if needed.

If the category exists, select it. If not, type the name of the new category.

This option is available only if it is a public favorite display.

**Private**

Specify if it is public or private.

If the box is unchecked, the favorite display will be a public one and will be visible by everyone, if they have the rights to see it in the permissions.

**Start display**

This box, if checked, allows to directly launch this favorite display when opening the planner.

If this box is checked for two or more favorite displays, the first of the list will be launched.

**Description**

Give a Description to the favorite display. It is optional.

Then, confirm the creation by clicking on the OK button.

Another way is to use the following keyboard shortcut:

- Ctrl + Shift + S : Save a new favorite display

**Save a favorite display**

To save a Favorite display, Display tab > Favorite displays > button.
Another way is to use the following keyboard shortcut:

- **Ctrl + S**: Save the current favorite display

### Select a favorite display

To select a **Favorite display**, **Display Menu > Favorite display >** button.

Then, select the name of the requested Favorite display:

### Delete a favorite display

To delete a **Favorite display**, **Display Menu > Favorite displays >** button.

A confirmation window appears:
Click on **Yes** button to definitely delete the favorite display.

Deleting a favorite display is irreversible.

display, favorite
Use an Events Report View

Header of a Events report view

The header of a view has several important features:

- The name of the view
- The name of the events report displayed
- The name of the resource filter applied
- The name of the events filter applied
- Time period

Layout of an Events report view

The Events report view fits in the Main Screen as the other views.

c.f Layout of the views

Display type of an Events report view

When an Events report view is selected, the default display is the Table display.

It is then possible to modify the display in 2 ways.
Display tab > Events report Menu

To re-edit the Events report, Click on the button.

To change the display type, choose between the suggested options: in Table, in Histograms, in Areas.

Print an events report view

As for others views, you can print the Events report view.

cf. Printing

Favorite display

As the other views, an Events report view can be register in a Favorite display.
Layout of the views

DEFINITION

Layout of the views allows to organize and order presentation of favorite display. The views can be moved

- On the left hand side of the display
- On the right hand side of the display
- At the bottom of the display
- At the top of the display
- As a Tab

It is also possible to pin a view.

USE

Move a view

- Click on the title bar of the view and hold down.
- Drag the view within the favorite display zone, a grey zone gives you a preview of the position of the view. The size will adapt automatically.
- Release the mouse button.

Here is an example of the action.
**Tab a view**

- Drag a view in the center of another view, a grey zone gives you a preview of the position of the view.
- Release the mouse button.
- The size will adapt automatically.

When a series of Tab views is displayed a magnifier appears on the left hand side of the views.

Select a view et and press CTRL + ← → to switch between views.

**Pin a view**

Clicking on the pin button hides the view, it does not close it. The view is still in the display and possibly reduced on the right hand side or the at the bottom of the favorite display depending on the initial position of the view. Here is an example of how to move a view in the display.
Duration bar

DEFINITION

A Duration bar is the graphic representation of an event.

The duration bar allows to display some events characteristics or some resources characteristics.

- a text that with one or several datas,
- one or several colors,
- an achievement,
- one or several icons,
- a tooltip,
- one or several events-sons.

SETTINGS

The Duration bar display can be set in:

- a schedule view
- or a diary view

USE

Schedule view

The Duration bar can be used in a schedule view.
Diary view

The Duration bar can be used in a diary view.

Handling

- Create
- Extend / shorten
- Move
- Delete

Print

When printing, the duration bar characteristics are preserved.

event, display
 Tooltip

 DEFINITION

A tooltip is displayed when the mouse is slid on a duration bar, an event, a link, ...

 EVENTS TOOLTIPS

 Features

• Contents: All the features of the events
• A feature per line (there is no display on a single line)
• The name of the features (“Title”) are always displayed
• The first line concerns the beginning and the end days / hours of the events
• The titles of the headings are represented like this: “Dimension Name - Heading Name”

 Use

Change the contents:

Right-Click > Configuration:

• Tooltip > As duration bars + Duration bar > Duration bar text
• Tooltips > Tooltips text

cf. Events tooltips

 LINKS TOOLTIPS

 cf. Links tooltips
WORKLOADS TOOLTIPS

Tooltip on the cells of the workloads

To every workload is associated a tooltip. The tooltip displays:

- The Value
- The Target
- The percentage
- The calculation Target - Value
- The calculation Value - Target

cf. Workload

HEADINGS TOOLTIPS

Tooltips on the names of the headings.

This is really useful when the names of the headings are too long.

cf. Schedule view, Events view, Resources view

RESOURCES TOOLTIPS

Tooltips on the names of the resources.
This is really useful when the names of the resources are too long.

**LINES TOOLTIPS**

Tooltips on the lines of the resources.

This is really useful when the names and the values of the headings are too long.

cf. Schedule view, Events view, Resources view
display, tooltip, event, link

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https://www.visual-planning.com/doc/en/5-gestion_de_l_affichage/infobulle

Last update: 2013/08/22 14:39
Diary view

DEFINITION

The Diary view allows to view the events schedule not horizontally but in the form of a Diary.

A Diary view can be:

- per day.
- per week.
- per finely worked week, i.e. without non working days.

SETTINOS

cf. Settings of a View

LIST OF DISPLAY SETTINGS

cf. Display settings of a Diary View

USE
c.f. General overview of the user interface

c.f. Use a Diary View

view, display, diary, event
Use a Diary View

Header of a Diary View

The header of a Diary view has several important features:

- The name of the view,
- The name of the resources filter that is active,
- The name of the events filter.

Create an event in a diary view

As for the schedule view and the events view, it is possible to create an event in a diary view.

This requires:

- Either make a Double-click on the view
- Either make a Drag and drop from another view.

<note important> If the display mode is not the month, then every event created in a diary view is hourly.

This applies even if the event creation rule is defined with a daily type. </note>

Diary view layout

The Diary view fits in the Main window as the other views.

c.f Layout of the views

Print a diary view

As for other views, it is possible to print a diary view.

cf. Printing

Favorite display

As the other views, a Diary view can be register in a favorite display.
Color palette

DEFINITION

The **Color palette** is a tool for selecting a color in VISUAL PLANNING.

USE

VISUAL PLANNING has many accesses to the color palette (c.f. Related Concepts)

For example, in the properties window of resources, there is a color as below:

![Color selection interface](image)

The color can be changed with the right buttons

Several methods are possible to choose color:

- Wheel mode
- Cursors mode
- Palette mode
- Faces mode
- Pencils mode
- Xoetrope mode

Wheel mode
Cursors mode
The cursor types are:

- Cursor grayscale
- Cursor RVB (Red Green, Blue)
- Cursor CMJN (Cyan, Magenta, Yellow, Black)
- Cursor TSL (Hue, Saturation, Brightness)
- Cursor HTML (Red, Green, Blue). The HTML code is shown. Example #FFFFFF for white.

**Palette Mode**

The range of possible types are:

- Apple
- Pencils
- Web Safe Colors
Faces Mode
Pencils Mode
Xoetrope Mode
Related Concepts

The color palette is used to define the colors of the following elements:

- Color Resource
- Highlight color (cf. Schedule view, Diary view, Resources view)
- Background color of the Event (cf. Schedule view, Diary view, Resources view)
- Outline of the event
  - selection
  - urgent
  - made
- color of the progress bar barre d'avancement
  - emergency
  - made
- pixel color of the Icon

palette, color, display
Time scale

DEFINITION

The Time scale is the finesse of the temporal representation of the view.

This scale can be considered as a tool that allows to do:

- a front zoom (short-term capture case),
- a back zoom (long-term capture case).

The finesse can be different according to the view that is used.

SCHEDULE VIEW

- In a Schedule view, the Time scale is represented with the nets of each column of the planner:
  - Year
  - Month
  - Week
  - Day
  - 1/2 day
  - 1/3 day
  - 1/4 day
  - Hour
  - Half-hour
  - Quarter-hour
  - 10 minutes
  - 5 minutes

DIARY VIEW

- In a Diary view, the Time scale can be:
  - in width:
    - the day
    - the finely worked week
    - the week
    - the month
  - in height:
    - Hour
    - Half-hour
• Quarter-hour
• 10 minutes
• 5 minutes

**USE**

**View time scale**

The Time scale can be shown:

- In a **Schedule view**, by the signification of a column of the schedule

**Exemple:**

Day Time scale in a schedule view:

<table>
<thead>
<tr>
<th>Resource</th>
<th>Mon 14</th>
<th>Tue 15</th>
<th>Wed 16</th>
<th>Thu 17</th>
<th>Fri 18</th>
<th>Sat 19</th>
<th>Sun 20</th>
<th>Mon 21</th>
<th>Tue 22</th>
</tr>
</thead>
<tbody>
<tr>
<td>Resource 1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource 2</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Resource 3</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

- In a **Diary view**, by the signification of a line of the diary.

**Exemple:**

Hour Time scale in a diary view:
Modify time scale

In a Schedule view

To modify the Time scale in a Schedule view, there are many possibilities:

- Menu Display > Schedule block > Scale
- Right-Click on an header of the schedule> Scale
- Place the cursor on the header of the schedule and Ctrl + Knurl

In a Diary view

To modify the Time scale of a Diary view, there are many possibilities:

- Menu Display > Diary block > Scale

* Right-Click on an header of the schedule> Scale
- Place the cursor on the header of the schedule and Ctrl + Knurl
Menu Bar

DEFINITION

The **Menu bar** can be seen in the **Main Screen**.

Horizontally oriented, it breaks down into sub menus containing blocks.

The visibility of the blocks depends on the element previously selected and on the users' rights.

These blocks disappear when the user's rights forbid their use.

The elements of the blocks are gray-colored when they are incongruous.

PLANNER MENU

Planner block

- New (cf. Models of planners)
- Open (cf. Open an existing planner)
- Delete : Only with VISUAL PLANNING ONE
  - version **ONE** : delete the current planner.
  - version **ESSENTIAL** or **ENTREPRISE** : see Admin Center (cf. **ADMIN CENTER**)

Printing block
• Print
• PDF
• Preview
• Page setting

c.f. Print

Export Block

• Export Resources
• Export Events
• Export events reports
• Export planner: Only with VISUAL PLANNING ONE
  ○ version ONE:
    ▪ into a file
    ▪ As model
  ○ version ESSENTIAL or ENTREPRISE see Admin Center (cf. ADMIN CENTER)

Import Block

• Import Resources
• Import Events
• Import a planner: Only with VISUAL PLANNING ONE
  ○ version ONE: see Import a planner
  ○ version ESSENTIAL or ENTREPRISE: see Admin Center (cf. ADMIN CENTER)
**Close Block**

Close the program (server version: only the client).

**SETTINGS MENU**

![Settings Menu Diagram](https://www.visual-planning.com/doc/)

**Windows block**

- Global Settings
- Icon album

**Configuration block**

The management of the Global Settings is reachable from this block.

**Predefined views block**
• Select an existing view
• Create a new view
  ○ Events view
  ○ Resources view
  ○ Schedule view
  ○ Diary view
  ○ Events report view
• Delete an existing view
• Save an existing view

**Extra View block**

Only for versions **VISUAL PLANNING ESSENTIAL** and **ENTREPRISE**.

This block allow to display the Chat Rooms from the current planner. (cf. Chatrooms)

**EDITION MENU**

The Edition menu changes according to the entities and views that are selected.

**General Block**
It concerns the data handling functionalities (Resources, Events, Links).

- Modify
- Duplicate (cf. Duplication)
- Delete

**Event Block**

- Cut
- Copy
- Repeat
  - Horizontally
  - Vertically
- Shift
- Assign a resource
- Realisation
  - Auto
  - 0%
  - 25%
  - 50%
  - 75%
  - 100%

cf. Event

**Links Block**

- Link events
• Dissociate events
• Respect links
• Link mode
  ○ Strict delay
  ○ Minimum delay
  ○ Maximum delay

cf. Link

Resources Block

• Add a Resource

DISPLAY MENU

Configuration Block

• Display settings

cf. View

Favorite displays block
• Save as
• Save
• Delete

cf. Favorite display

**Rows block**

This block is shown after a selection on a Schedule view.

• Mode
  o List
  o tree
• Sort

cf. Schedule view

**Mode Block**

This block is shown after a selection on a Resources view.

• Icons
• List
• Details
• Table

cf. Resources view
Visibility Block

This block is shown after a selection on a Resources view.

- Sort
  - Sort
  - Group by
- Visual
  - Icon
  - Color
- Alignment
  - Vertical
  - Horizontal

cf. Resources view

Planner Block

This block is shown after a selection on a Schedule view.

- Scale (cf. Time scale)
- Scroll
  - Free
  - Day
  - Week
  - Month
- Split vertically
- Display the night hours (non working) (cf. Hourly calendar)
- View non working days (cf. Daily calendar)
- Display weeks (from 1/4 day scale)
- View links (cf. Link)
- Display / Hide Workloads

cf. Schedule view
Diary Block

This block is shown after a selection on a Diary view.

- **Mode**
  - Day
  - Week
  - Business week
  - Month
- **Visibility**
  - Scale (cf. Schedule view)
    - Hour
    - Half-hour
    - 15 minutes
    - 10 minutes
    - 5 minutes
  - Display the night hours (non working) (cf. Hourly calendar)

cf. Diary view

Events report block

This block is shown after a selection on an Events reports view.

- **Select an Events report**
- **Display type**
  - Table
  - 2D histogram
  - Stacked 2D histogram
  - 3D histogram
  - Stacked 3D histogram
  - 2D Pie chart
  - 2D Pie chart
Intersect the period: The **Period** is the period on which the events report is applied: c.f. [Time period](#)

**FILTERS MENU**

![FILTERS MENU Image](https://www.visual-planning.com/doc/en/5-gestion_de_l_affichage/barre_de_menu)

**Filter of 'Dimension'**

The filters concern the dimension of the view.

- View all
- 'Dimension'
  - Launch
  - Modify
  - Create
  - Duplicate
  - Delete
- Display the 'Dimension' with at least one visible event
  - According to the period
    - Intersect
    - Cover
    - Included in
    - Start in
    - End in
  - Time period (cf. [Time Period](#))
    - User defined (c.f. [Customized](#))
    - Defined

**Events filters Block**
• View all
• Events filter
  ◦ Launch
  ◦ Modify
  ◦ Create
  ◦ Duplicate
  ◦ Delete

• Filters of the other dimensions (c.f. Resources filter)
  ◦ Launch
  ◦ Modify
  ◦ Create
  ◦ Duplicate
  ◦ Delete

cf. Events filters

**Free period block**

This block is shown after a selection on a Schedule view or on a Resources view.

• Common free period
• Search the 'Dimension'

cf. Free period

menu, display

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https://www.visual-planning.com/doc/en/5-gestion_de_l_affichages/barre_de_menu

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Input editors

DEFINITION

An **Input editor** allows the customization when a creation / modification is done on:

- The resources dimension by dimension,
- The events.

EDITOR OF EVENTS

The **Editor of events** allows to create or modify the events depending on some single customized informations.

cf. Events Input Editor

EDITOR OF RESOURCES

The **Editor of resources** allows to create or modify the resources of the dimensions in fonction of an adapted and customized format.

cf. Resources Input Editor
Events Input Editor

DEFINITION

The Events Editor allows to create or modify the events according to a single and customized layout.

SETTINGS

The setting access is restricted to the users identified as « administrators ».

The way to define a user as an administrator is done in the ADMIN CENTER, menu Planning > Right-Click on the planning > Modify > Administrators users (c.f. Definition of administrators).

Default model

A default input editor model exists. This model is used when any other model corresponds to the selected event.

To see this model, go to the Global settings panel > Input editors > Events input editors > Default.

The lower part of the panel is then opened:

The only modification that can be done on this model concerns the check box Always available. If it is unchecked, this model will be hidden.
Create an events input editor

In the panel **Global settings**, right click on **Input editors > Events input editor > Add a new Input Editor**:

The following windows appears:
It is necessary to specify the following features, then click on **OK** to save the settings of the events editor.

It is also possible to create an **Events Input Editor** by **Settings > Configuration block**. (cf. **Menu Bar**)

This features are:

**Name**

The text field **Name** must be filled. It gives a name to the **Events Input Editor**.

**Description**

The text field **Description** is optional. It gives a description of the **Events Input Editor**.

**History**

It is the date and the hour of the last modification of the editor of events. It shows also the login of the user who has done the last modification.
This feature is modified automatically.

**Activated**

This checkbox determine if the editor of events is activated or not.

It is necessary to leave this box unchecked if we want to unable the **Events Input Editor** temporally.

**Event's filter**

The list allows to filter the events which would be related to the **Events Input Editor**.

(cf. **Events Filter**)

**Editor**

To acces to the editor and set the settings, click on the right part of the line **Editor**:

The following window appears:

The next step is to build the editor using different objects to perform or just to see the characteristics of the event.

These objects are:

**Event's values**

The possible values are the available informations in an edition window of an event.
Select the items among the attributes:

- Start date,
- End date,
- Load (in hours),
- ...

These features are modifiable. (cf. Use)

Resources headings
These values are simply visual and used only for informational purposes. It is not possible to modify them. They correspond to different values of the items of the dimensions. Select the items among the existing headings.

These features are modifiable. (cf. Use)

**Label**

It is possible to insert texts in the editor.

These features are modifiable. (cf. Use)

**Children events list**

It is possible to insert an events view which allows to see the children events of the selected event.
Only the children of the immediate lower hierarchy level appear.

**Objects alignment**

It is possible to align with one click all the values added. Once they have been selected it is possible to make alignments.

**To do so, select the objects to align and do the alignment with the following block:**

- Left alignment: The fields are placed at the same height as the one which is the most left.
- Top alignment: The fields are placed at the same height as the one which is the most top.
- Right alignment: The fields are placed at the same height as the one which is most right.
- Bottom alignment: The fields are placed at the same height as the one which is the most down.
- Vertical alignment: The fields are placed vertically and centered.
- Horizontal alignment: The fields are placed horizontally and centered.

**New name**

The objects can be renamed, in order to stick closer to the business terminology. To do so, **double-click on the object** and seize the new name in the window that appears.

**Delete an object**

To delete an object, select it and click on the **X** button.

**selection of several heading**

it is possible to select multiple heading, with selecting the first and last fields with pressing shift

**Context Menu**

It is also possible to add components with a context menu (right click), the position of the mouse cursor set the upper left corner of the added component.
when choosing the components of the event properties or items to add to the entry editor, there is a possibility to select multiple items in one fell swoop by clicking select attributes

By clicking Select attributes, the following window opens:
Modify an events input editor

Go to the Global settings panel > right-click on Events Input editors > choose the right editor. The following window appears:

Modify the characteristics and click on the OK button to validate the modifications.

cf. Create an events input editor.
Delete an events input editor

To delete an events input editor, go to the **Global Settings** panel > **Events input editors** > **Right-Click on the editor** > **Delete**.

Assign to an event creation rule

The **event creation rule** can define the editor which opens every time that an event is created. To do so, precise into the event creation rule which editor must be used.

cf. **Creation rule**

USE

Opening an editor

Using an editor is very simple.

When right-clicking on an event or a group of events, the **menu contextuel** permits:

- If only one model corresponds, it will be set by the **right-click on the event** > **modify**;
- If two or more models correspond, select the right model by the **right-click on the event** > **modify**.

Example:
Printing

It is possible to print an event using an events input editor.

To do this, right click on the event > Print > Preview
Resources Input Editor

DEFINITION

The Resources Input Editor allows to create or modify the resources of the dimensions in function of an adapted and customized format.

SETTINGS

The setting access is restricted to users identified as « administrators ».

The way to define a user as an administrator is done in the ADMIN CENTER, menu Planning > Right-Click on the planning > Modify > Administrators users (c.f. Definition of administrators).

Défaut Modèle

Several defaults resources models exist. There is one per dimension.

This model is used, if no other model exists or if no model corresponds to the selected resource.

To view this model, you must go to the General Settings panel > Input Editors > resources Editors > Default

The bottom panel opens:
The only possible setting for this model is the checkbox **Always available allowing** if unchecked to hide the existence of this model when a model is compatible with the selection of events.

It is advisable not to check this box when testing the application.

It is possible to access the menu of input editors by the panel General Settings> Publishers entry or by setting menu configuration block> Publishers saisiz Right click on Resources Input Editor > Add a new Input Editor for > Select the dimension:

The following window opens:
It is necessary to specify the following features, then click Ok to save the settings of the Resources Input Editor.

It is also possible to create an Resources Input Editor by Settings > Configuration block (Menu Bar)

This features are:

**Name**

The text field Name must be filled. It gives a name to the Resources Input Editor.

**Description**

The text field Description is optional. It gives a description of the Resources Input Editor.

**History**

It is the date and the hour of the last modification of the editor of events. It shows also the login of the user who has done the last modification.
This feature is modified automatically.

**Actived**

This checkbox determine if the **Resources Input Editor** is activated or not.

It is necessary to leave this box uncheckd if we want to unable the **Resources Input Editor** temporally.

**Filtre de ressources**

The list **'Selected Dimension' Filter** allows to filter the resources of the selected dimension when the **Resources Input Editor** has been created.

(cf. [Resources filter](https://www.visual-planning.com/doc/en/5-gestion_de_l_affichage/editeur_de_ressources))

**Editor**

To acces to the editor and set the settings, click on the right part of the line **Editor**:

![Editor](https://www.visual-planning.com/doc/en/5-gestion_de_l_affichage/editeur_de_ressources)

**USE**

The acces to the Events Input Editor is done by an empty window. It is necessary to choose the values that the user should fill or simply see every time he modifies a resource.

**Input values**

**Heading's values**

This are the most common values on the creation of an **Resources Input Editor**. The possible values are the headings of the dimension related to the resource.
Visual Values

Add a label

It is possible to write a text that appears whenever you open the edit window of event where it was placed.

Resources list

This list gives the possibility to show the whole resources (from one or several dimensions) related to the selected resource.

List of children events

This feature allows a portion of the edit window reserved for an event view of the children events from the selected event.
It is showed only the children events of the first lower hierarchi level

**Context Menu**

It is also possible to add components with a context menu (right click), the position of the mouse cursor set the upper left corner of the added component. component when choosing the components of the event properties or items to add to the entry editor, there is a possibility to select multiple items in one fell swoop by clicking select attributes
By clicking Select attributes, the following window opens:

Alignements

It is possible to align with one click all the values added. Once they have been selected it is possible to make alignments following:

- Left alignment: The fields are placed at the same height as that is the leftmost.
- Top alignment: The fields are placed at the same height as that is the topmost.
- Right alignment: The fields are placed at the same height as that which is most right.
- Bottom alignment: Fields are placed at the same height as that is the most down.

selection of several heading

it is possible to select multiple heading, with selecting the first and last fields with pressing shifrt

Printing

it is possible to print one or more resources following an input editor model, Once they have been selected right click → Print
Select Print, Preview or PDF as needed, the following window opens:

![Configuration - Arrêt](image)

At the bottom of the window in the Print field according to the editor, choose the desired editor.
Use an Events View

Header of an Events View

The header of a view has several important features:

- The name of the view
- The name of the filter resource that is active
- The name of the event resource that is active
- The period

Context menu

A user can operate several actions by context menu of a resources 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

cf. Context menu of the event view

Events view Layout

The Events view is laying out into the Main Screen as the other views.

cf. Layout of the views

Event sort

It is possible to sort the event with their visible column in the left part of the event

cf. Sort

Events view printing

As for others views, you can print the events view.

cf. Printing
Favorite display

Like the other views, an Event reports view can be registered into a favorite display.
Use a Schedule View

Header of a resources view

The header of a view has several important features:

- The name of the view
- The name of the resources filter that is active
- The name of the dimension (table mode only)

Tree mode

As for the Schedule view, the resources view is able to display the resources in a tree.

To do this, you must go to the menu Display > Diary > Tree mode

This mode displays the resources so as a tree:
This feature is only available in table mode.

The visualization of nodes allows to combine several resources that have the same value.

By default the number of tree level is 2, when this mode is activated.

It is possible to increase or reduce the number of levels via buttons, located at the bottom left of the view.

In the case of a heading with numeric type, control column or operation, the node value for this column is:

- **Display Format** integer or decimal: the node is equal to the sum of its resources,
- **Display Format** percentage: the node is equal to the average values of its resources.

### Context menu

A user can operate several actions by context menu of a 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**.

- 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
- View location : cf. GeoLocation
- View routing: cf. GeoLocation
- Recompute location : cf. Geolocation heading

**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/)

**Context menu Tree mode**

![Context menu Tree mode](https://www.visual-planning.com/doc/)
### 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
Resources view Layout

The resources view fits into the Main Screen like other views.

cf. Layout of the views

Sort resources

As with others views in table mode, it allows you to sort resources with visibles columns.

cf. Sort

Resource view printing

As with others views, you can print:

- the resources view,
- or resources that make up the view.

cf. Print

Favorite Display

As with others views, a resources view can be stored in a favorite display.
Use a Schedule View

Header of a schedule view

The header of a Schedule view has several important features:

- The name of the view
- The name of the filter resource that is active
- The name of the filter event that is active
- The name of the dimension

Tree mode

As for the Schedule view, the schedule view is able to display the resources in a tree.

To do this, you must go to the menu Display > Rows > Tree mode

This mode displays the resources so as a tree:
The visualization of nodes allows to combine several resources that have the same value.

The **Search** function is also available in the Tree mode. cf : [Search](https://www.visual-planning.com/doc/en/5-gestion_de_l_affichage/vue_planning_utilisation)

By default the number of tree level is 2, when this mode is activated. It is possible to increase or reduce the number of levels via buttons, located at the bottom left of the view.

If disabled then immediate reactivation, the level number is kept.

In the case of a heading with numeric type, control column or operation, the node value for this column is:

- **Display Format** *integer* or *decimal* : the node is equal to the sum of its resources,
- **Display Format** *percentage* : the node is equal to the average values of its resources.

**Context menu**

A user can operate several actions by context menu of a resources view.

**Context menu on resources**

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

- 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 table mode](image)

**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.
Schedule view Layout

The schedule view is laying out into the Main Screen as the other views.

cf. Layout of the views

Move in a schedule view

To navigate through time:

- Use Small calendar
- Use keyboard arrows Left or Right

To browse resources:

- 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 resources
- 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

cf. Context menu
• Use scrollbar
• Use keyboard arrows Up or Down

Resource sort

It is possible to sort the resource with their visible column in the left part of the resources

cf. Sort

Print a schedule view

Like in the others views, you can print the schedule view.

cf. Print a view

Favorite display

Like the other views, an Event reports view can be registered into a Favorite display.

view, display, planner, event, schedule, resource