Quick Start Guide
Visual Planning 6 New Features
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Chapter 1. ADMIN CENTER

1.1. Admin Center Dashboard

The Admin Center user interface has been entirely redesigned, giving immediate access to all menus.

Drag&Drop can be used to edit and assign items to each menu.

For instance: assigning a licence to a user by dragging and dropping the licence key onto the user, assigning users to a group through drag and drop, etc.

1.2. Planner Menu

Changes have been made to the planner settings edition window.

It can now be used to:

- Add a custom logo image to each planner through the **planner logo option**
- Add a button on the Visual Planning homepage to give direct access to a planner (in the rich client) through the **Publish Visual Planning Access option**
- Add a button on the Visual Planning homepage to give direct access to a planner (in VPPortal) through the **Publish VPPortal access option**

1.3. Document storage and file navigator

Files attached in Visual Planning can now be stored in a **cloud drive (DropBox or Google Drive)** instead of on the Visual Planning server. To activate storage in the cloud and link Visual Planning to an existing account, an access key generated by DropBox or Google Drive must be entered in the Admin Center.

A new **Document Navigator** option allows administrators to view the list of documents that have been uploaded.

1.4. Connection history
Administrator users can now retrieve which client has been utilized by the users of a planner. To do that, right click on a planner and select **Connection history**, then choose a time period. The following window is displayed:

### 1.5. User avatars

Each user can now be assigned an avatar. To do that, click on **Profile picture** in the user edition window, then select the picture that you wish to associate with this user.

The profile picture will be displayed upon connection. The picture shown is the one of the last user who connected to the planner.
1.6. Log management

Content of the log files can now be viewed directly within the Admin Center. To do that, click on Display server logs to open a list of server logs.

The log of the current day is displayed by default.

An administrator can:

- Display a specific log file by clicking on it;
- Download a log by clicking on the green arrow icon;
- Select one or more log(s) to delete them.

1.7. Import / Export planner settings

Administrator users can now export the configuration and settings of a selected planner, and re-import it elsewhere without impacting data (events and resources). This feature aids at facilitating modification and changes that are performed while the planner is already in use. Structural changes can be performed and validated in a test / pre-production environment, then exported and imported on the live production planner.

To do so, right click on a planner which settings have been modified, then select Planner settings > Export… Modifications are saved in a proprietary Visual Planning format (.vpi).

Once settings have been exported, right click on the planner on which you want to apply the new settings, and select Planner settings > Import…

NOTE As an option, content of dimensions that are considered structuring and forming part of the settings can also be exported and modified through this feature (for instance, a Status dimension). Special attention is recommended, as once the dimension is selected for export, a deleted resource in the exported planner will also be deleted in the target planner, along with all its associated events.
Chapter 2. Rich Client

2.1. Dimensions and Resources

2.1.1. Settings

2.1.1.1. Icons

A new set of icons has been added to version 6. The icon album menu is no longer available, but users can utilize any picture of their choice as an icon by editing the default icon and dragging and dropping an image file onto the drawing area.

The displayed size of icon can be customized in each view, for resources and events. The size options range from 16 to 64px.

2.1.1.2. Color selection

The color selection tool has been modified in version 6.

A default color palette is available by default when assigning a color to a resource or calculation. More color selection options (color wheel, extended palette, hex code) are available when clicking on Choose another color. A color picker allows users to select the color of any element displayed on the screen.

2.1.2. Headings

2.1.2.1. Rich text

A new option has been added in multiline text headings. Ticking the “rich text” checkbox will enable users to format text using colors, bold, bullet lists… The formatting can be displayed in custom editors, e-mail templates, in VPPortal, etc.
2.1.2.2. QR Code

In barcode headings, it is now possible to add a QR Code.

2.1.2.3. Direct in-cell edits of values

Some values can now be edited directly within a cell in a table view. Editable values include single line text, multiline text, numerical and boolean (checkbox) headings.

To edit a value, click once on the cell, then click again so that the cursor shows in the cell.

2.2. Views

2.2.1. Title bars

The title bars of views are now displaying simpler text, with only the view name.

Labels of filters applied to the active view are now displayed in the task bar located on the bottom left of the screen, and will also show as a tooltip when hovering on the title bar.

2.2.2. New event view types

The event view that existed in version 5.3 has been split in several types of views, allowing configuration options to show straight away in the view’s display settings window.

There are now 4 types of event views that can be created:

- Events: this view shows a list of events organized in Table or in Details modes;
- Event Gantt: displays events in a Gantt chart (with a schedule);
- Event Kanban: shows several lists of events dispatched in columns based on a dimension. This dispatch dimension can be:
  - The master dimension of the view: moving an event from a column to another will modify the event;
  - Another dimension: a new event is created each time the event is moved.
• Event map: displays a list of events along with a map on which the events are geolocated:

2.2.3. Quick search "full text"

Users can now perform searches directly on items displayed in a table view (Resource view, Event view). To do so, you may:

• Either click on the magnifying glass icon located on top right of the view
• Or use the CTRL+F shortcut to display the search box.

Items in the table are filtered in real time based on the text string entered in the search box.

2.3. Events

2.3.1. Repeat an event with children events

A parent event containing one or more children events can now be repeated along with all the events it contained.

To do so, right click on the parent event and select Repeat > Horizontally, Vertically or On selection. Select a repeat frequency and other repeat options, then click OK.

2.3.2. Load in days per hour

A new type of load called Days per hour as been added to load options. When selecting this type of load, hours will be converted in days. This feature allows a greater flexibility in managing use cases where the hourly time span on which a resource can be scheduled is greater than the maximum hours that the resource should work in a day.
For instance, a production plant may be running 24 hours a day, but the normal duration of a workday for shift workers is 8 hours. In order to know how the workload of a shift worker compares to a workday, the load can be configured as **Days per hour** and set at 0.125. The load of a 4-hour shift will then show as 0.5 day, or 1 full day for an 8-hour shift, etc.

### 2.3.3. Changes to the resource assignment window

The resource assignment window has been modified to adjust filter menus and make options selected more readable.

![Resource Assignment Window](image)

### 2.3.4. Filter children events based on parent event

In a vertical hierarchy, children events can now be filtered based on properties of the parent event. A new menu item called “Parent event filter” is available in the criteria options of event filters.

![Filter Children Events](image)

Once the criteria are added, an event filter containing criteria to retrieve the parent event can be selected.

![Parent Filter Example](image)
2.4. Event reports

2.4.1. JavaFX

Graphical representations displayed in event reports are now utilizing a new library called JavaFX, allowing enhanced visualization of data.

2.4.2. Accrue values

An option allowing to accumulate values has been added to event reports. When activated, results of each calculation in the report will be summed with previous columns. This option is only available if data is grouped using a time period or a dimension.

2.4.3. Area and stacked area charts

In addition to charts already available, two new types of charts have been added: area and stacked area.

Figure 2.1. Area chart

Figure 2.2. Stacked area chart
2.4.4. URL export

Event reports can now be downloaded without being connected to Visual Planning, using a unique URL. To enable the URL export, the checkbox **Call by URL** needs to be ticked.

Authentication can be added to the URL export, so that a login and a password are required when accessing the URL before the event report starts downloading.

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2.5. Miscellaneous

2.5.1. Weather information

Weather information is now displayed in two locations in the rich client:

- In the preference bar: Weather is computed based on the local IP addressing of the client workstation
- In Event map views: Weather is shown based on the geolocation of a displayed resource. To view the weather info, click on the geolocation heading of the resource to display the map.

Weather is provided for 4 consecutive days.
2.5.2. Updated homepage

The home page of the Visual Planning index has been redesigned. Options now allow admin users to:

- Customize the homepage title
- Customize the description and content of the homepage
- Modify the name and icon that allows access to the rich client
- Hide buttons that allows access to the rich client or the admin center
- Add a button with direct access to one or more planners from the rich client (the selected planner will automatically load upon launch)
- Add a button with direct access to one or more planners in VPPortal (users will login straight into the selected planner)

![Updated homepage](image)

2.5.3. Export targeting several imports

A resource or event export can now target several import contexts. Each of the imports listed will trigger when the export is launched, and will receive data from the same export.

To do so, the import contexts to target have to be listed in the path of the export target.

For instance, in an export context defined for the Staff dimension, the path contains the names of the import contexts that will be triggered by the export: "IMPORT=Import Jobs, Import Milestones". In this scenario, when the Staff export is launched, data exported will be used as a source to run the job import, then the milestone import.
Chapter 3. VPPortal

3.1. Display resources and events using HTML

Resources and events can now be displayed using an HTML formatting. This is similar to HTML formatting in views of the rich client. To allow HTML formatting, the VPPortal context must be in Details mode.

3.2. Custom editors

Customized input editors can now be created for events and resources in VPPortal.

In each VPPortal context, an editor can be selected manually to apply to all events and resources displayed in the context. Alternatively, the Automated option will let the system display various editors based on filter criteria defined in each editor.

3.3. Children events
Children events can now be listed within the editor of their parent event. This allows VPPortal users to create, modify or delete children events when editing the parent.

3.4. Event reports

Event reports can now be displayed in VPPortal in a new « event report » context. One or more event reports can be associated in the VPPortal context. For each report added, a display mode (table, bar chart, pie chart, etc.) needs to be selected.
3.5. Workloads

Workloads can now be displayed in VPPortal. To do so, create a schedule context in VPPortal, then select one or more workloads to display along with a display mode in the settings window.
Chapter 4. File storage options

4.1. Definition

By default, Visual Planning stores all files uploaded through attachment headings in the Documents folder of the Visual Planning server.

In Visual Planning 6, administrator users can now personalize the file storage location, and store files:

- In another folder of the Visual Planning server
- In a DropBox account
- In a Google Drive account

This configuration is performed in the Admin Center will be applied to all attachment headings that are in "upload" mode, for all planners, and all headings will store files in the same storage location.

If you have previously used attachment headings to store files on the Visual Planning server, those files will not be automatically transferred to your new storage space. The file transfer will need to be performed manually by an administrator to allow users to access those files. Planner users will no longer be able to access files that remain in the previous storage location.

This feature is only available in Visual Planning Enterprise.

4.2. Configuration

The storage location can be configured in the Admin Center. In the task bar, click on File storage settings and select the storage location you want to use.

4.2.1. File system

When selected, the file system option will upload files to a folder on the Visual Planning server.

Click on File storage settings > File system, then enter the storage path for your files on the Visual Planning server in the prompt.
4.2.2. DropBox

In order to store files in DropBox, Visual Planning requires an access token that can be obtained through a DropBox account.

4.2.2.1. Steps to complete on DropBox

To create a DropBox account, an e-mail address is required.

4.2.2.1.1. Register on DropBox

To register a new account, go to https://www.dropbox.com/register.

You may register with a Google account, or using any e-mail address.

- For a Google account (Gmail), select register for free with Google
- For another type of account, fill in the form fields (First and Last Name, E-mail, Password), tick the box to accept terms and conditions, then click on register.

4.2.2.1.2. Download DropBox

This step is optional. The following message appears:

Downloading DropBox is not mandatory if you only need to connect it with Visual Planning file storage. It enables users to synchronize DropBox contents with a local directory.

Select continue or quit depending on your preference. In both cases, registration is complete after this step.

4.2.2.1.3. Create an app

Once you have an account, navigate to the following URL: https://www.dropbox.com/developers/apps/create.

If you just created the account, you will need to verify your e-mail address. Click on Send email for verification.
In the e-mail received, select **Validate your e-mail address**.

The following page appears:

Choose an API.

Choose the type of access that the application will have on your DropBox.

Enter a name for the application, for instance **STILOG**

Check the box to agree to API terms and conditions.

Then click on **Create app**:

**4.2.2.1.4. Generate an Access Token**

Once the app is created, the following page appears. Under **Generate Access Token**, click on **Generate**.
The access token generated should look as follows:

![Generated access token]

4Y2zmsuN9A5DgjP1pmvFQCRGy6sQUceSNlytnmvGQNntUwaZWRE98R

Make sure to save the access token in a secure location.

### 4.2.2.2. Steps to complete on VISUAL PLANNING

Go back to Visual Planning and connect to the Admin Center, then click on **File Storage settings > DropBox**.

Copy and paste the DropBox access token that you generated.

Your Visual Planning file storage is now linked to your DropBox account, and files uploaded in Visual Planning will be saved in DropBox.

### 4.2.3. Google Drive

In order to link file storage to a Google Drive, Visual Planning requires an access token that can be obtained through a Google account (for instance, a gmail address).

#### 4.2.3.1. Steps to complete on Google Drive
4.2.3.1.1. Connect to a Google account (Gmail)

Log in an existing Google account (Gmail) at https://accounts.google.com.

Navigate to the following URL: https://console.developers.google.com/project. A page shows a list of projects. It may be empty if you have never used Google APIs. Click on Create project.

Enter a project name of your choice, and modify the ID if needed, then click on Create.

4.2.3.1.2. Create a project

4.2.3.1.3. Create a client ID

The following window appears, and the name of your project is shown a drop-down menu in the top left corner. If your project doesn’t show, click on the list to select it. Then in the API & Services menu, select Credentials.
The **Credentials** panel appears. Click on the **OAuth consent screen** tab, then enter a name of your choice under **Product name shown to users** and click on **Save**.

This brings you back to the **Credentials** tab. Click on **Create credentials > OAuth client ID**.
Select Other, then enter a **client ID** of your choice (free text), then click on **Create**. A prompt appears showing a client ID and a secret code, click **OK** to close it.

The credentials panel now shows the client that we just created. Click on the **download icon** on the right (descending arrow) to download a « .json » file. The file is downloaded in your default download folder for the web browser.

Make sure to save this file in a secure location.

4.2.3.1.4. Enable the Google Drive API

In the **API & Services** menu, select **Library**, and enter « Drive » in the search bar to retrieve the **Google Drive API**.

Click on the **Google Drive API tile**, then select **Enable**.
4.2.3.2. Steps to complete on Visual Planning

Go back to Visual Planning and connect to the Admin Center, then click on File Storage settings > Google Drive.

Copy and paste the content of the "json" file that you downloaded access token that you generated (the file can be opened with the notepad or a text editor).

Your Visual Planning file storage is now linked to your Google Drive account, and files uploaded in Visual Planning will be saved in Google Drive.