Editing data
Table of Contents

I. Achievement ................................................................................................................................... 1
  1. DEFINITION .................................................................................................................................. 1
  2. CONFIGURATION ........................................................................................................................... 1
  3. USE ................................................................................................................................................ 1
     Visualization ..................................................................................................................................... 1
     Direct modification from within the view .......................................................................................... 2
     Modification by editing events ......................................................................................................... 2
     Use by other functionalities .............................................................................................................. 3

II. Assignment .................................................................................................................................... 4
  1. DEFINITION ................................................................................................................................... 4
  2. ASSIGNMENT TO ANOTHER RESOURCE ......................................................................................... 4
  3. ASSIGNING AN EVENT, DEPENDING ON AVAILABILITY .................................................................. 5
  4. ASSIGNING AN EVENT, DEPENDING ON DISTANCE ........................................................................ 7
     Compute distances ........................................................................................................................... 8
     Localization period .......................................................................................................................... 8
  5. AUTOMATIC ASSIGNMENT ............................................................................................................ 9

III. Automatic filter .......................................................................................................................... 10
  1. DEFINITION ................................................................................................................................... 10
  2. CONFIGURATION ........................................................................................................................... 10
  3. USE ................................................................................................................................................ 10

IV. Availability .................................................................................................................................. 11
  1. DEFINITION ................................................................................................................................... 11

V. Calendar ....................................................................................................................................... 12
  1. DEFINITION ................................................................................................................................... 12
  2. USE ................................................................................................................................................ 12
     Handling ......................................................................................................................................... 12
     Use by other functionalities .............................................................................................................. 13

VI. Color ....................................................................................................................................... 14
  1. DEFINITION ................................................................................................................................... 14

VII. Compressing events .................................................................................................................. 15
  1. DEFINITION ................................................................................................................................... 15
  2. USE ................................................................................................................................................ 15

VIII. Customized .............................................................................................................................. 17
  1. DEFINITION ................................................................................................................................... 17
  2. USE ................................................................................................................................................ 17
     Customized resource filter .............................................................................................................. 17
     Customized events filter ................................................................................................................ 17
     Customized calendar ........................................................................................................................ 18
     Customized time period .................................................................................................................. 18

IX. Customized filter ......................................................................................................................... 19

STILOG IST, all rights reserved
## Use

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Configuration</td>
<td>30</td>
</tr>
<tr>
<td>3. Use</td>
<td>37</td>
</tr>
</tbody>
</table>

## Duplication

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Duplication of events</td>
<td>21</td>
</tr>
<tr>
<td>3. Duplication of resources</td>
<td>22</td>
</tr>
</tbody>
</table>

## Duration

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Use</td>
<td>25</td>
</tr>
<tr>
<td>4. Impact on other functionalities</td>
<td>25</td>
</tr>
<tr>
<td>5. Calculations for events durations</td>
<td>26</td>
</tr>
<tr>
<td>6. Conversion of days into hours</td>
<td>29</td>
</tr>
</tbody>
</table>

## Resource Filter

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Configuration</td>
<td>30</td>
</tr>
<tr>
<td>3. Use</td>
<td>37</td>
</tr>
<tr>
<td>4. Use by other functionalities</td>
<td>37</td>
</tr>
</tbody>
</table>

## Events Filter

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>2. Configuration</td>
<td>39</td>
</tr>
<tr>
<td>3. Use</td>
<td>47</td>
</tr>
<tr>
<td>4. Use by other functionalities</td>
<td>47</td>
</tr>
</tbody>
</table>

## Filter

<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>3. Use</td>
<td>47</td>
</tr>
<tr>
<td>4. Use by other functionalities</td>
<td>47</td>
</tr>
</tbody>
</table>
XXI. Pop-up menu ........................................................................................................................... 74
   1. DEFINITION .................................................................................................................................... 74
   2. RESOURCES VIEW ........................................................................................................................ 74
   Pop-up menu for the header of the view ..................................................................................... 74
   Pop-up menu for resources ........................................................................................................ 75
   3. SCHEDULE VIEW ............................................................................................................................ 76
   Pop-up menu of the heading headers ......................................................................................... 76
   Pop-up menu for resources ........................................................................................................ 78
   Pop-up menu for events ............................................................................................................... 79
   Context-sensitive menu for the header of the schedule view .................................................... 80
   Pop-up planning menu ............................................................................................................... 81
   Pop-up menu for links ................................................................................................................ 82
   4. DIARY VIEW ................................................................................................................................... 83
   Pop-up menu for the header of the view ..................................................................................... 83
   Pop-up menu for events ............................................................................................................... 84
   Pop-up diary menu .................................................................................................................... 85
   5. EVENTS VIEW .................................................................................................................................. 87
   Pop-up menu for the view ........................................................................................................... 87
   Pop-up menu for events ............................................................................................................... 87
   Pop-up menu for the heading header ......................................................................................... 89
   6. GANTT EVENTS VIEW ................................................................................................................ 90
   Pop-up menu for the header of the view ..................................................................................... 90
   Pop-up menu of the column headers ....................................................................................... 91
   Pop-up menu for events ............................................................................................................... 92
   Pop-up menu for the header of the planning view .................................................................... 93
   7. KANBAN EVENTS VIEW .............................................................................................................. 94
   Pop-up menu for the header of the view ..................................................................................... 94
   Pop-up menu for events ............................................................................................................... 95
   8. EVENTS MAP VIEW ..................................................................................................................... 96
   Pop-up menu for the header of the view ..................................................................................... 96
   Pop-up menu for events ............................................................................................................... 97
   Context-sensitive menus of the events zone ........................................................................... 98
   9. EVENTS REPORT VIEW ............................................................................................................. 99
   Pop-up menu for the view ........................................................................................................... 99
XXII. Private ........................................................................................................................................... 100
   1. DEFINITION .................................................................................................................................... 100
XXIII. Refresh ........................................................................................................................................ 101
   1. DEFINITION .................................................................................................................................... 101
   2. USE .................................................................................................................................................. 101
   Manual refresh .......................................................................................................................... 101
   Automatic refresh ..................................................................................................................... 101
   Common update delay ............................................................................................................... 102
XXIV. Repeating an event ........................................................................................................................................ 103
   1. Horizontal repeating of events ................................................................................................................ 103
      Every .................................................................................................................................................... 103
      Worked ............................................................................................................................................... 104
      Same day ........................................................................................................................................... 104
      Repeat until ..................................................................................................................................... 104
      Number of repetitions .................................................................................................................... 104
      Parameters ....................................................................................................................................... 104
      Worked events .................................................................................................................................. 105
   2. Vertical repeating of events ................................................................................................................ 105
      Repeating group ............................................................................................................................. 106
      Repeating a note, a formula, valuation items .................................................................................. 106
   3. Repeating events from a selection .................................................................................................. 106
      Parameters ....................................................................................................................................... 107
      Selecting resources ....................................................................................................................... 108

XXV. Searches .................................................................................................................................................. 109
   1. DEFINITION ..................................................................................................................................... 109
   2. USE .................................................................................................................................................. 109
      “Search” function .......................................................................................................................... 109
      Quick, “full text” search ................................................................................................................. 110

XXVI. Selection ............................................................................................................................................... 112
   1. DEFINITION ..................................................................................................................................... 112
   2. RESOURCES .................................................................................................................................... 112
      Selecting a resource ....................................................................................................................... 112
      Selecting multiple resources ........................................................................................................ 112
      Resource selection window ........................................................................................................... 112
   3. EVENTS ............................................................................................................................................ 113
      Selecting an event .......................................................................................................................... 113
      Selecting multiple events .............................................................................................................. 113
   4. LINKS .............................................................................................................................................. 114
      Selecting a link ................................................................................................................................ 114
      Selecting multiple links ................................................................................................................ 114

XXVII. Shifting ............................................................................................................................................... 115
   1. DEFINITION ..................................................................................................................................... 115
   2. USE .................................................................................................................................................. 115
      Drag and Drop ............................................................................................................................... 115
      Properties of the event .................................................................................................................. 115
      Shift ................................................................................................................................................ 115

XXVIII. Sort .................................................................................................................................................. 118
   1. DEFINITION ..................................................................................................................................... 118
   2. USE .................................................................................................................................................. 118
      Data sorting in table mode ............................................................................................................. 118
      Saving ............................................................................................................................................. 119
<table>
<thead>
<tr>
<th>Section</th>
<th>Page</th>
</tr>
</thead>
<tbody>
<tr>
<td>Sorting elements in a list</td>
<td>119</td>
</tr>
<tr>
<td>XXIX. Undo / Redo</td>
<td>120</td>
</tr>
<tr>
<td>1. DEFINITION</td>
<td>120</td>
</tr>
<tr>
<td>2. USE</td>
<td>120</td>
</tr>
<tr>
<td>Undo</td>
<td>120</td>
</tr>
<tr>
<td>Redo</td>
<td>121</td>
</tr>
<tr>
<td>XXX. Worked</td>
<td>122</td>
</tr>
<tr>
<td>1. DEFINITION</td>
<td>122</td>
</tr>
<tr>
<td>2. USE</td>
<td>122</td>
</tr>
<tr>
<td>The type of period worked</td>
<td>122</td>
</tr>
<tr>
<td>Event worked</td>
<td>122</td>
</tr>
</tbody>
</table>
Chapter I. Achievement

1. DEFINITION

“Achievement” allows you to define the progression of an event.

“Achievement” may be:

- Automatic, based on the current date and time. In this case we assume that events automatically follow the defined progress at the scheduled dates,
- Manual, that is to say, defined by the user. In this case actions undertaken by the user are used to define the progression of the event.

Thus, and dependent on the individual case, various states of progress are possible:

- **Planned**: The event is planned to take place. It is scheduled for the future,
- **Urgent**: The event is late. The status is only used for manual achievements,
- **Ongoing**: The event has started and is progressing normally. In the case of manual operations, this may even be early,
- **Completed**: The event has taken place, it is finished.

2. CONFIGURATION

The achievement process may require configuration, defined using the creation rules.

3. USE

Visualization

The achievement of an event is shown on the duration bar in the Schedule and Diary view or in the Gantt Events view.

The duration bar may show a progress bar.

It is possible to choose the color and positioning of the progress bar (top, center, bottom).

In addition, the color of the urgency status (manual achievement only) may be shown as the color of the progress bar or that of the border of the event.

The configuration of this display is part of the configurations for the view display.
Direct modification from within the view

In a Planning or Agenda view, it is possible to adjust the mode (manual or automatic) as well as the progress percentage, by right clicking on an event > achievement.

![Edit Window](image)

Modification by editing events

By a right-click on an event > Modify the event edit window will appear.

The achievement block has three parameters:

- The “Automatic” checkbox, used to automate the completion of an event,
- A progress bar, determining the percentage of completion. It runs from 0% to 100%,
- The events status which may not be modified, is dependent on several factors.

Automatic achievement

For automatic achievement, the modifications to completion rates do not require user intervention.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Completion percentage</th>
<th>Event status</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>Equal to 0%</td>
<td>Planned</td>
</tr>
<tr>
<td></td>
<td>Between 0% (excluded) and 100%</td>
<td>Ongoing</td>
</tr>
<tr>
<td></td>
<td>Equal to 100%</td>
<td>Completed</td>
</tr>
</tbody>
</table>

It is possible to change from automatic to manual mode by deselecting the Automatic achievement box.

Manual achievement

For a manual achievement mode, the modifications to completion rates require user interventions.

<table>
<thead>
<tr>
<th>Mode</th>
<th>Completion percentage</th>
<th>Event start date</th>
<th>Event status</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

STILOG IST, all rights reserved
<table>
<thead>
<tr>
<th>Manual</th>
<th>Planned</th>
<th>Ongoing</th>
<th>Urgent</th>
<th>Completed</th>
</tr>
</thead>
<tbody>
<tr>
<td>Equal to 0 % after the current date value (in the future)</td>
<td>Equal to 0 % after the current date value (in the future)</td>
<td>Between 0% (inclusive) and 100% Lower than the current date value (in the past)</td>
<td>Equal to 100%</td>
<td></td>
</tr>
</tbody>
</table>

It is possible to change from manual to automatic mode by selecting the **Automatic achievement** box.

**Use by other functionalities**

This achievement value may be used by other functionalities:

- **Filter**,
- **Events Report**,
- **Control column**,
- **Import of an event** and **export of an event**.
Chapter II. Assignment

1. DEFINITION

The assignment of a resource is its association with an event or another resource.

There are several alternatives:

- the assignment of a resource to another resource,
- the assignment of a resource to an event:
  - depending on availability,
  - depending on distance,
  - automatically.

2. ASSIGNMENT TO ANOTHER RESOURCE

This functionality exists for all resources which have a Resource type heading.

From the properties window for a resource:

- By selecting a “dependent” resource in the list (if the option “load all when opening” has been checked in the dimension).

- By clicking on the selection button for a dependent resource.

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

To do this, the following actions are available:

- **Select** a resource by clicking on it,
- Reduce the number of visible resources by using a filter, taken from the **resource filters** for the dimension in question,
- **Search** for a resource using the **identification headings** for the dimension in question,
- **Add** a new resource,
- Choose to display more **headings**, by **double clicking on the name of the dimension**,

Depending on **user rights**, certain of these actions may not prove possible.

### 3. ASSIGNING AN EVENT, DEPENDING ON AVAILABILITY

This functionality exists for all events.

From the event properties window, by clicking on the resource selection button:

The following window opens:
This window is used to select one or more resources.

To do this, the following actions are available:

- **Select** a resource by clicking on it,
- Select multiple resources using **CTRL+Click** (for a vertical **hierarchy**),
- Reduce the number of visible resources by using a **filter**, taken from the **resource filters** for the dimension in question,
- Display only those resources available, using an events filters, and:
  - the **duration**,
  - or the **load**.
- **Search** for a resource using the identification headings for the dimension in question,
- **Add** a new resource,
- Choose to display more headings, by **double clicking on the name of the dimension**

Depending on user rights, certain of these actions may not prove possible.

- When assigning a resource to multiple events, the available resources shown in this window are those available for the whole period of all selected events,
- For a **control column** type heading, with the option of **clicking on the date**, the event’s start date is used as the pivot point for the calculation of the period.
4. ASSIGNING AN EVENT, DEPENDING ON DISTANCE

This functionality exists for all events as long as the dimensions have a geolocalization type heading.

From the event properties window, by clicking on the resource selection button:

The following window opens:

This window is used to select one or more resources.

To do this, the following actions are available:

- **Select** a resource by left-clicking on it,
- **Select** multiple resources using **CTRL+Click** (for a vertical hierarchy),
- **Reduce** the number of visible resources by using a **filter**, taken from the **resource filters** for the dimension in question,
- **Display** only those resources available, using an events filters, and:
  - the **duration**,
  - or the **load**.
- **Calculate** the distances, by checking the dedicated box, then selecting two geolocalization type headings: See **below**.
- **Choose** the localization period for the resources, checking the appropriate box: See **below**.
- **Search** for a resource using the identification headings for the dimension in question,
- **Add** a new resource,
Choose to display more headings, by double clicking on the name of the dimension

Depending on user rights, certain of these actions may not prove possible.

When assigning a resource to multiple events, the available resources shown in this window are those available for the whole period of all selected events.

For a control column type heading, with the option of clicking on the date, the event’s start date is used as the pivot point for the calculation of the period.

Compute distances

If the compute distances box is checked, a column appears, entitled Distance:

This column is not a distance type heading and is not therefore stored in the database.

It is simply a column to help in the selection of resources.

It is calculated as being the distance between two selected geolocalization type headings.

Localization period

This option is only active if the Computer Distances box is checked.

If the localization box is checked, you must select the period, in number of days or number of hours:
Before,

or Afterwards.

The distance calculation is then completed, depending on the position of the resource within the events that follow (after) or precede (before) the event in question, during the selected period.

For resources without an event within the selected period, we assume that the localization heading for the resource is to be taken into account for the calculation of distance.

Example:

<table>
<thead>
<tr>
<th>Professional meaning</th>
<th>Example of associated configuration</th>
</tr>
</thead>
<tbody>
<tr>
<td>Mr. Durand lives in Lyon</td>
<td>The resource, Mr. Durand, has a geolocalization heading with a value corresponding to Lyon</td>
</tr>
<tr>
<td>Mr. Durand travels to Marseille on Monday</td>
<td>Mr. Durand is involved in an event on Monday, so the “Activities” resource has a geolocalization heading, with a value corresponding to Marseille.</td>
</tr>
<tr>
<td>Mr. Durand has no movements on Tuesday</td>
<td>Mr. Durand has not geolocalized events on Tuesday</td>
</tr>
<tr>
<td>We are looking for someone to travel to Nice on Wednesday</td>
<td>An event is set for Wednesday, on a “Activity” resource, with the geolocalization heading given the value corresponding to Nice.</td>
</tr>
<tr>
<td>How far does Mr. Durand have to travel if he leaves the evening before the event from his home in Lyon?</td>
<td>Assign the distance, with a localization period equal to 0 days</td>
</tr>
<tr>
<td>How far does Mr. Durand have to travel if he leaves the a day before, from his last place of work? (Marseille)</td>
<td>Assign the distance, with a localization period equal to 1 day</td>
</tr>
</tbody>
</table>

5. AUTOMATIC ASSIGNMENT

It is possible to Automatically assign resources to a set of existing events.

Simply define an assignment criterion, made up of a filter and a set of headings.
Chapter III. Automatic filter

1. DEFINITION

An **automatic filter** is a filter, which is generated automatically for certain types of heading. Automatic filters are accessible from the Menu Bar.

2. CONFIGURATION

This functionality is used during the configuration of the heading itself.

Only those headings with a finite range of values, meeting the criteria of this type of filter.

The types of heading possible are therefore:

- **Unique Choice List heading**.
- **Resource type heading**.
- **Boolean type Heading**.

3. USE

The use of these automatic filters involves launching them.

This can be done from the menu bar or the context-sensitive menu.

It is possible to select resources by clicking on (Choose) if the heading is a resource-type heading.
Chapter IV. Availability

1. DEFINITION

Availability is a time period, during which one or more resources have no event of a given type. It is a period for a defined duration, with the absence of any event meeting a given filter. When searching for a resource to assign to an event, it is possible to reduce the list of resources that may be assigned using an availability filter.

This notion of availability is used in:

- Free Period,
- Availability defined by Filter,
- Assignment of available resources.
Chapter V. Calendar

1. DEFINITION

An element of the main window, used to choose a date.

2. USE

Handling

The Calendar is therefore visible:

To choose a date, click on the button to the right of the calendar: 📅.

The calendar will then open:

There are several possibilities:

- Choice of year,
- Choice of month,
- Choice of day,
- Choice of today’s date.

The definition of week numbers is defined by the Standard 8601 created by the International Standards Organization (ISO).
This standard defines that the first week of the year is that containing the first Thursday of the year.

Use by other functionalities

The calendar can be found in the following functionalities:

- Schedule view,
- Diary View,
- Gantt Events View,
- Date Hour type of heading.
Chapter VI. Color

1. DEFINITION

VISUAL PLANNING uses numerous colors for multiple functionalities. The majority of the time these colors can be modified using a color pallet.

The colors using the pallet are:

- Resource color,
- Highlighting color,
- event background color,
- event border color (outline):
  - selection,
    - urgent,
    - completed.
- progress bar color:
  - urgency,
  - completed.

Icon pixel color,

hourly and daily calendar color.
Chapter VII. Compressing events

1. DEFINITION

Compression allows the user to position a selection of events one behind another, without a free space between them, or with a fixed time between events.

The pivot event is that on which the right click is applied.

The compression order is based upon the start date, then if this is equal, the creation date.

2. USE

Select events to be compressed.

Then, right-click on the events > Compress, taking time to select the pivot event (right-click on it).

The following screen appears:
Select the time interval to be inserted between each event and click on **Validate**.

The events are compressed in this order, by start date then, if equal, by creation date.

During multiple uses of the functionality, the last parameters chosen are preserved by default.
Chapter VIII. Customized

1. DEFINITION

The notion of a customized entity is very useful to VISUAL PLANNING. We can therefore create, for example, filters unique to the entity, without having to name them. Customized filters are not visible from outside the entity to which they are attached.

E.g.: A customized filter for a workload is only visible from within the configuration window for this workload.

2. USE

Customized resource filter

- Dimensional criterion for events filter,
- Dimensional criterion for resource filter,
- Search for common free period,
- Target constraint,
- Coherency constraint,
- Time gap constraint,
- workload,
- Events Report,
- Rights management,
- Web-agenda publication module.

See Customized filter

Customized events filter

- Control total type heading,
- Events value type heading,
- Events filter-based criterion for events filter,
- Events filter-based criterion for resource filter,
- Search for common free period,
- Triggering and verification of a target constraint,
- Triggering and verification of a coherency constraint,
- Triggering and verification of a time gap constraint,
- Workload,
- Events Report,
- Rights management,
- Web-agenda publication module.

See **Customized filter**

**Customized calendar**

- Assignment of a resource to an hourly calendar,
- Assignment of a resource to a daily calendar.

See **Calendars**

**Customized time period**

- Events filter-based criterion for resource filter,
- Search for common free period,
- Events Report.

See **Time Period**
Chapter IX. Customized filter

1. DEFINITION

Within some of the functionalities provided by VISUAL PLANNING, it is possible to create filters without having to use the Parameters > Filters tab. These filters are called “customized filters”

The customized filter can be either a resource or an events filter. The filtering criteria used are the same as those for the named filters.

Customized filters are only visible and can only be used within the functionality within which they were created. However, it is possible to name these filters and then re-use them throughout VISUAL PLANNING.

For example, take the events report.

An events report is based on a dimension, it is possible to filter the resources in this dimension using a customized filter. To do this, simply choose “customized” from the drop-down list.

The following window opens. You must defined the filter criteria as you do for named filters.
2. RENAMING A CUSTOMIZED FILTER

Once the criteria have been defined, a filter may remain customized, or may be renamed. To do this, click on “customized” and two buttons will appear. Click on the left hand button.

Name the filter then click on Validate.
Chapter X. Duplication

1. DEFINITION

The duplication function allows the user to repeat or copy and paste one or more pieces of date in the planning.

You can duplicate:

- An event (See duplication of events below),
- A resource (See duplication of resources below).

2. Duplication of events

Copy and Paste a selection of events

After having made a selection of one or more events, it is possible to duplicate them.

This duplication may be carried out on other resources, at other dates, within the same view or into a different view.

To do this:

1. Right click on the selected events > Copy,
2. Then click at the point desired > Paste.

It is also possible to use keyboard shortcuts:

1. After selecting one or more events: Ctrl + C,
2. Click at the point desired > Ctrl + V.

Duplicate a selection of events

After having made a selection of one or more events, it is possible to duplicate them.

To do this:

1. Right click on the selected events > Duplicate,
2. This will open an events editing window. Click on Validate.

Duplicate using drag and drop

It is possible to duplicate an event easily by holding down the SHIFT key then dragging and dropping the event onto another date or resource.
This functionality only exists in the planning view.

3. Duplication of resources

Duplicate using the menu

To do so, Right-click on the resource to duplicate > Duplicate.

The following message appears:

![Question](Question.png)

Define whether the events in the initial resource should be duplicated or not.

Depending on the response:

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

Duplicate using drag and drop

Do to this, drag and drop a resource onto another resource.

The following message appears:

![Question](Question.png)

Define whether the events in the initial resource should be duplicated or not.

Depending on the response:

- **Yes**: The resource is duplicated, with its events,
- No: The resource is duplicated, without its events.
Chapter XI. Duration

1. DEFINITION

The duration is used to quantify the time and associate it with a number and unit.

Depending on the type of entities treated within VISUAL PLANNING, the duration units may be:

- The day,
- The Half-day,
- The Hour,
- The Minute.

The primary duration used by VISUAL PLANNING is that of the event which is based upon the difference between:

- Event end date/time,
- and event start date/time.

This duration may be totaled, converted, and used, by a number of functionalities.

The maximum duration of an event is 20000 days.

2. CONFIGURATION

The configuration involves initializing the duration of an event.

Creation rules

The creation rules are used as the origin of the event duration.

This property is managed by the duration, by default, of the creation rules, which may be:

- Either undefined,
- Or based on a heading,
- Or a fixed value,
- Or the result of an operation involving two headings,
- Or, based upon the resource calendar.

The creation rules also determine whether the event is worked or not. This is a critical factor in understanding the date/time of the end of the event, as a function of its duration, or, on the other hand, to understand the duration of an event as a function of its end date/time (For Events Imports).
Calendars

The hourly and daily calendars are another determining parameter for the duration of an event, if it is worked.

In fact, the periods marked as not worked in the hourly and daily calendars are not included in the duration of an event said to be worked.

Example:

The event follows a daily calendar, with Saturdays and Sundays not worked.

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

- Event worked: 2 Days,
- Event not worked: 4 Days.

3. USE

The duration of an event is used by numerous other functionalities in VISUAL PLANNING.

Impact on other functionalities

Load

The load of an event can be determined as a function of the duration, in the event that the load type is:

- Automatic,
- in days, by day,
- in hours by day,
- in hours by hour,
- As a percentage.

Example:

An event, with a duration of 2 days, has a load of 2 days per day.

The value of the load is therefore 4 days.

Valuation items

The valuation variable for an event is determined from the duration, if the time unit for the valuation item is:
the day,
- the hour,
- the load, in days (if the type of load is variable with the duration),
- the load, in hours (if the type of load is variable with the duration),
- Depending on the type of event.

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

An event, with a duration of 2 days, has a valuation variable with a value of 2.

The total value of the valuation item is therefore 4.

**Example 2:** The time unit for the valuation item is **the load, in days**.

An event, with a duration of 2 days, has a load of 2 days per day.

The value of the load is therefore 4 days.

This event has a valuation variable with a value of 2.

The total value of the valuation item is therefore 8.

**Calculations for events durations**

**Control total type section**

A **Control Total** type heading is used to produce a total of the durations of multiple events.

This duration can be:

- **Duration of events (h):** The total of the duration for events converted into hours. If the events are in hours, this is simply the total of the durations of these events.
- **Duration of events (d):** The total of the duration for events converted into days. If the events are in days, this is simply the total of the durations of these events.
- **Achieved duration (h):** The total of the completed duration of events, converted into hours.
- **Achieved duration (d):** The total of the completed duration of events, converted into days.
- **Duration of free periods (h):** These are the free periods in the planning, converted into hours.
- **Duration of free periods (d):** These are the free periods in the planning, converted into days.
- **Occupation duration (h):** The period during which the resource is occupied, in hours. This duration is calculated using the coverage, or not, of the free periods, and may not exceed the total of the latter.
- **Occupation duration (d):** The period during which the resource is occupied, in days. This duration is calculated using the coverage, or not, of the free periods, and may not exceed the total of the latter.
See conversion of days into hours

Example:

A resource with a daily calendar, when only Saturdays and Sundays are not worked. In addition it has an hourly calendar, with 8 hours worked per day.

Within this resource an event exists during the week. It starts on the Monday and ends the next Thursday. This event is completed to a level of 50%.

The duration, in days, of the event is therefore 4 days. The duration, in hours, is 32 hours.

Its completed duration in days is therefore 2 days. Its completed duration in hours is therefore 16 hours.

The duration of the free periods in days during the week, is 1 day. The duration of the free periods in hours, is 8 hours.

load

A workload is used to provide a total of the durations of multiple events for the whole of a time period.

Each of these periods is linked to the time scale on a planning view, which is used to visualize the load.

This duration can be:

- Duration of events (h): The total of the duration for events converted into hours. If the events are in hours, this is simply the total of the durations of these events.
- Duration of events (d): The total of the duration for events converted into days. If the events are in days, this is simply the total of the durations of these events.
- Occupation duration (h): The period during which the resource is occupied, in hours. This duration is calculated using the coverage, or not, of the free periods, and may not exceed the total of the latter.
- Occupation duration (d): The period during which the resource is occupied, in days. This duration is calculated using the coverage, or not, of the free periods, and may not exceed the total of the latter.
- Duration of free periods (h): These are the free periods in the planning, converted into hours.
- Duration of free periods (d): These are the free periods in the planning, converted into days.
Example:

An event starts on the Monday and ends the next Tuesday.

A load, calculating the duration in days, is shown on the daily time scale.

The value of the load is equal to 1 day on Monday and 1 day on Tuesday.

See conversion of days into hours

Events Report

An events report is used to produce a total of the durations of multiple events.

This duration can be:

■ Duration of events (h): The total of the duration for events converted into hours. If the events are in hours, this is simply the total of the durations of these events.

■ Duration of events (d): The total of the duration for events converted into days. If the events are in days, this is simply the total of the durations of these events.

■ Achieved duration (h): The total of the completed duration of events, converted into hours.

■ Achieved duration (d): The total of the completed duration of events, converted into days.

■ Duration of free periods (h): These are the free periods in the planning, converted into hours.

■ Duration of free periods (d): These are the free periods in the planning, converted into days.

See conversion of days into hours

Events values heading

An events value type heading is used to assign the duration of an event to a resource.

This duration can be:

■ Duration in hours: This is the duration of the event, if in an hourly format; or a conversion into hours if it is daily format.

■ Duration in days: This is the duration of the event, if in an daily format; or a conversion into days if it is hourly format.
See conversion of days into hours

Operation type heading.

An operations type heading, in duration mode, is used to calculate a duration as being the difference between two dates, sourced from two headings, of the type:

- Date/hour,
- or event value.

Example:

This heading is used to establish a calculated duration as being the difference between the end date of an event and the start date of another.

Conversion of days into hours

A duration may be converted into a number of hours or a number of days.

Example:

A daily-counted event lasts 3 days, the calendar for the event indicates that each day lasts 8 hours.

The conversion into days, of the daily duration of this event, returns the value of 24 hours.
Chapter XII. Resource filter

1. DEFINITION

An resource filter is used to filter resources in a dimension, based upon numerous criteria.

This is a very important tool in the day-to-day use of the tool.

A filter for resources simplifies the display, and can be used by numerous functionalities within VISUAL PLANNING.

The resource filters are an assembly of one or more different types of criteria.

2. CONFIGURATION

Creating a Resource Filter

Access to the creation of an resource filter is from the General settings panel, then by Filters > Resource Filters > Right Click > Create filter > Dimension.

The corresponding part is then enabled.
Specify the characteristics for the filter, then confirm by clicking on the **Validate** button.

These characteristics are as follows:

**Name**

Give this filter a name.

**Description**

The description is used to give information as to the utility of the filter. This data is optional.

**Private**

Check this box to define the filter as being private.

**History**

This represents the creation date and time and the most recent change to the filter, together with the login of the user who performed these actions.

This property is updated automatically.

**Setting only**

If checked, this box renders the filter invisible within the filtering menus.

**Filter criteria**

Define the criteria for the filter at this point.

Construct the filter using the following operations:
Editing data

Addition of a criterion

It is possible to add one or more criteria to the filter, by clicking on **Add**:

![Add button](image)

See [Description of type of criteria and groups](#)

Addition of a criterion group

It is possible to create a criteria group using two separate methods:

- **Click on the Add button > Condition group,**
- **Select one or more criteria then click on Group:**

![Group button](image)

See [Description of type of criteria and groups](#)

Deleting criteria or a group

To delete a criterion or group, select it then click on **Delete**.

The deletion of a group involves the deletion of all component criteria.

Duplicating a Resource Filter

The duplication of a filter is via the General settings panel, then **Filters > Dimension Filters > Dimension > Right click on filter > Duplicate**
The corresponding part then opens, where you should modify the criteria as required. (See Creating a Resource Filter)

Modifying a Resource Filter

The modification of a filter is carried out using General Settings > Click on Filters > Dimension Filter > Dimension housing the filters > Select the filter to modify.

The corresponding (lower) part then opens, where you should modify the criteria as required. (See Creating a Resource Filter)

Deleting a resource filter

Before deleting a filter it is recommended that you check that it is not used by another functionality (another filter, events report, constraint, hierarchy, etc.).

To delete a filter, go to General settings > Filters > Select a filter > Right-click > Delete.

A confirmation window will then appear.

There are two possible options:

- Validate the deletion using the YES button,
- Cancel the deletion using the NO button.

*Deletion of a filter is definitive.*

Description of type of criteria and groups

There are a number of different criteria which can be assembled into groups.

**Dimension heading criterion**

In this case, the criteria is based upon the **request mode**, using the triplet: Heading/Condition/Value.
### Editing data

<table>
<thead>
<tr>
<th>Heading</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't contain</td>
<td></td>
</tr>
<tr>
<td></td>
<td>starts with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't start with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ends with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td>Enter a value or check the box “on request” or, dependent on the heading</td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>

Select a dimension heading

In addition, the conditions vary with the type of heading.

Global user variables can be used to define the value field:

- $USERNAME
- $GROUPNAME

### Dimension criterion

In this case, the criteria is based upon the resources for the chosen dimension.

There are two possible modes, **selection mode** and **combined filter mode**:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selection</strong></td>
<td>is included in</td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
</tr>
</tbody>
</table>

Select the resources, holding the CTRL key down
Editing data

<table>
<thead>
<tr>
<th>Combined filter</th>
<th>is in the filter</th>
<th>Select an existing resource filter or create a customized resource filter</th>
</tr>
</thead>
<tbody>
<tr>
<td>is not in the filter</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

In both modes, it is possible to check the box “on request”. If this box is checked, a data entry window will open for the triggering of a filter.

**History criterion**

In this case, the criteria is based upon the **request mode**, using the triplet: Data/Condition/Value.

<table>
<thead>
<tr>
<th>Criteria</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created on /</td>
<td>equal to</td>
<td>Enter a value or a heading, or check the “on request” box</td>
</tr>
<tr>
<td>Modified on</td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>

| Created by /     | equal to                       |                                            |
| Modified by      | contains                       |                                            |
|                  | not equal to                   |                                            |
|                  | starts with                    |                                            |
|                  | ends with                      |                                            |
|                  | greater than                   |                                            |
|                  | less than                      |                                            |
|                  | greater or equal to            |                                            |
|                  | less than or equal to          |                                            |
|                  | doesn't start with             |                                            |
Global user variables can be used to define the value field:

- $USERNAME
- $GROUPNAME

Events filter criterion

This criteria filters resources as a function of whether or not certain types of events are present and attached to these resources.

All the events can be defined by an existing events filter. This is a combined filter.

<table>
<thead>
<tr>
<th>Type</th>
<th>Events filter</th>
<th>Report for the period</th>
<th>Period</th>
</tr>
</thead>
<tbody>
<tr>
<td>Does not contain an event or contains at least one event from the events filter</td>
<td>Select an existing filter or create a customized filter</td>
<td>Intersect the period Covers the period Included in the period Starts in the period Ends in the period</td>
<td>Choose an existing time period or create customized time period, or even check the “on request” box</td>
</tr>
</tbody>
</table>

If the “on request” box is checked, the period is to be defined by the user when the filter is applied.

Group Criterion
Two options are available for the treatment of criteria contained within the group:

- **Verify all criteria**: Only those resources which meet all criteria will be taken into account for the results of the filter. This option involves an intersection of criteria.
- **Verify at least one criteria**: Once a resource meets at least one criterion, it will be taken into account for the results of the filter. This option involves a union of criteria.

**“On request” checkbox**

**Without variable**

If the on request checkbox is selected, a window will open for the triggering of a filter.

```
Criterion headings - HR

<table>
<thead>
<tr>
<th>Name</th>
<th>equal to</th>
<th>To ask</th>
</tr>
</thead>
</table>

```

**With variable**

Alongside the checkbox a new edit button appears and can be activated. Its activation shows up a dialogue box, which can be used to enter the name of the variable for the criterion in question.

```
MY_VARIABLE
```

This named variable can be used in the definition of an import or export context, called up by URL. Each variable takes the value written into the URL, used to refine the range of the filter applied.

See [URL for Exports and Imports](#).

### 3. USE

**USE**

**Triggering a filter**

A filter is triggered by the menu bar at the top of the screen.

The results of an applied filter can be seen directly in the view being used.

**Use by other functionalities**

The resource filters can be used by:
- Other resource filters of the same dimension,
- Events filter,
- Control total heading,
- Events values type heading,
- workload,
- Events Report.
Chapter XIII. Events filter

1. DEFINITION

An events filter is used to filter events in a planning, based upon criteria involving:

- The characteristics of the event: start date, end date, load, etc.
- All headings for the resources within the event.

This is a very important tool in the day-to-day use of the tool.

A filter for events simplifies the display, and can be used by numerous functionalities within VISUAL PLANNING.

The events filters are an assembly of one or more different types of criteria.

2. CONFIGURATION

Creating an events filter

Access to the creation of an events filter is from the General settings panel, then by Filters > Events Filters > Right Click > Create events filter.

The corresponding part is then enabled.
Specify the characteristics for the filter, then confirm by clicking on the **Validate** button.

These characteristics are as follows:

**Name**
Give the filter a name.

**Description**
The description is used to give information as to the utility of the filter. This data is optional.

**Private**
Check this box to define the filter as being private.

**History**
This represents the creation date and time and the most recent change to the filter, together with the login of the user who performed these actions.

This property is updated automatically.

**Setting only**
If checked, this box renders the filter invisible within the filtering menus.

**Filter criteria**
Define the criteria for the filter at this point.

Construct the filter using the following operations:

**Addition of a criterion**
It is possible to add one or more criteria to the filter, by clicking on **Add**:
Editing data

Addition of a criterion group

It is possible to create a criteria group using two separate methods:

- **Click on the Add button > Condition group,**
- **Select one or more criteria then click on Group.**

It is possible to separate certain criteria by selecting them then clicking on **Degroup.**

Deleting criteria or a group

To delete a criterion or group, select it then click on **Delete.**

The deletion of a group involves the deletion of all component criteria.

Duplicating an events filter

To duplicate a filter, go to **General Settings > Filters > Events Filters > Right click on the filter > Duplicate.**
The corresponding part then opens, where you should modify the criteria as required. (See Creating an events filter)

Modifying an events filter

To duplicate a filter, go to General Settings > Filters > Events Filters > Select the filter to modify. The corresponding part then opens, where you should modify the criteria as required. (See Creating an events filter)

Deleting an events filter

Before deleting a filter it is recommended that you check that it is not used by another functionality (another filter, events report, constraint, etc.).

To delete a filter, go to General settings > Filters > Select a filter > Right-click > Delete. A confirmation window will then appear.

![Confirmation window](image)

There are two possible options:

- Validate the deletion using the YES button,
- Cancel the deletion using the NO button.

Deletion of a filter is definitive.

Description of type of criteria and groups

There are a number of different criteria which can be assembled into groups.

**Event criterion**
Editing data

In this case, the criteria is based upon the **request mode**, using the triplet: Data/Condition/Value.

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

- Start date,
- End date.

**Dimension heading criterion**

In this case, the criteria is based upon the **request mode**, using the triplet: Dimension heading/Condition/Value.

First choose the dimension to apply the filter to.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Select a dimension heading</td>
<td>equal to</td>
<td>Enter a value or check the box “on request” or, dependent on the dimension heading or formula</td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't contain</td>
<td></td>
</tr>
<tr>
<td></td>
<td>starts with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't start with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ends with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>
Global user variables can be used to define the value field:

- $USERNAME
- $GROUPNAME

**Dimension criterion**

In this case, the criteria is based upon the resources for the chosen dimension.

There are two possible modes, **selection mode** and **combined filter mode**:

<table>
<thead>
<tr>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td><strong>Selection</strong></td>
<td>is in, is not in</td>
</tr>
<tr>
<td></td>
<td>Select the resources, holding the CTRL key down, or “on request”, or, based upon the heading</td>
</tr>
<tr>
<td><strong>Combined filter</strong></td>
<td>is in the filter, is not in the filter</td>
</tr>
<tr>
<td></td>
<td>Select an existing resource filter or create a customized resource filter, or check the “on request” box.</td>
</tr>
</tbody>
</table>

**History criterion**

In this case, the criteria is based upon the **request mode**, using the triplet: Data/Condition/Value.

<table>
<thead>
<tr>
<th>Data</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Created on, modified on, created by modification on</td>
<td>equal to</td>
<td>Enter a value or check the box “on request” or, dependent on the dimension heading or formula.</td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ends with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>
Global user variables can be used to define the value field:

- $USERNAME
- $GROUPNAME

**Formula criterion**

In this case, the criteria is based upon the **request mode**, using the triplet: Formula heading/Condition/Value.

First choose the formula to apply the filter to.

<table>
<thead>
<tr>
<th>Heading</th>
<th>Condition</th>
<th>Value</th>
</tr>
</thead>
<tbody>
<tr>
<td>Choose a formula heading</td>
<td>equal to</td>
<td>Enter a value or check the box “on request” or, dependent on the dimension heading or formula.</td>
</tr>
<tr>
<td></td>
<td>not equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>contains</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't contain</td>
<td></td>
</tr>
<tr>
<td></td>
<td>starts with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't start with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>ends with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>doesn't end with</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than</td>
<td></td>
</tr>
<tr>
<td></td>
<td>greater or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>less than or equal to</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is included in</td>
<td></td>
</tr>
<tr>
<td></td>
<td>is not included in</td>
<td></td>
</tr>
</tbody>
</table>
Events filter criterion

This is a combined filter.

There are two types of criteria:

- is in the filter,
- is not in the filter.

Then choose the associated events filter or create a customized events filter.

Parent filter criterion

A filter applied to a parent event. Checks that the parent event is included in this filter.

There are two types of criteria:

- is in the filter,
- is not in the filter.

Then choose the associated events filter or create a customized events filter.

Group Criterion

Two options are available for the treatment of criteria contained within the group:

- **Verify all criteria**: Only those events which meet all criteria will be taken into account for the results of the filter. This option involves an intersection of criteria.
- **Verify at least one criteria**: Once an event meets at least one criterion, it will be taken into account for the results of the filter. This option involves a union of criteria.

“On request” checkbox

Without variable

If the on request checkbox is selected, a window will open for the triggering of a filter.

With variable

Alongside the checkbox a new edit button appears and can be activated. Its activation shows up a dialogue box, which can be used to enter the name of the variable for the criterion in question.
This named variable can be used in the definition of an import or export context, called up by URL. Each variable takes the value written into the URL, used to refine the range of the filter applied.

See URL for Exports and Imports

3. USE

Triggering a filter

A filter is triggered by the menu bar at the top of the screen.

The results of an applied filter can be seen directly in the view being used.

Use by other functionalities

The events filters can be used by a number of VISUAL PLANNING functionalities.

These include:

- The events filters themselves,
- The resource filters,
- The event reports,
- The constraints,
- The workloads,
- The control total type headings,
- The events values type headings.
Chapter XIV. Filter

1. DEFINITION

A **filter** is a request, used to search for data using defined criteria.

The user can filter resources or events.

The general principle of a filter (resource or event) is as follows:

- A set of requests, grouped in “grouped conditions”,
- Each request includes:
  - A characteristic of a resource or event,
  - An operator,
  - A value (potentially “to be requested”).
- All the conditions for a group respecting the INTERSECTION or UNION of the group.
- We can group (or de-group) the grouped conditions together.

2. FILTER TYPES

**Named filter**

There are two types of named filter:

- **Resource filter**,
- **Events filter**.

Named filters can be re-used by other functionalities:

- Views,
- Favorite displays,
- Control totals,
- Events values,
- Workloads,
- Events reports,
- Constraints,
- Workflows,
- Import, export and publication,
- Rights management,
- Free periods.

**Combined filter**

Filters may be combined. Therefore one filter can be defined as the condition of another filter.

A resource filter can be used as the criteria for:

- a resource filter,
- an events filter.

**Selection filters**

**DEFINITION**

This functionality allows you to filter certain selected resources or events, without creating a named filter.

This makes it easier to handle VISUAL PLANNING data.

**USE**

**In the planning view**

**Right click on a selection of resources > Filter the selection.**

![Image of filter selection]

**Right click on a selection of events > Filter the resources for the selection.**
In events view, Gantt events view, Kanban events view

Right click on a selection of events > Filter the selection.
In resource view

Right click on a selection of resources > Filter the selection.
DEFINITION

An **automatic filter** is a filter, which is generated automatically for certain types of heading. Automatic filters are accessible from the Menu Bar.

CONFIGURATION

This functionality is used during the configuration of the heading itself. Only those headings with a finite range of values, meeting the criteria of this type of filter. The types of heading possible are therefore:

- **Unique Choice List heading**,
- **Resource type heading**,
- **Boolean type Heading**.

USE

The use of these automatic filters involves launching them. This can be done from the menu bar or the context-sensitive menu.
It is possible to select resources by clicking on (Choose) if the heading is a resource-type heading.

3. USE

Triggering a filter

A filter is triggered by the menu bar at the top of the screen.

The results of an applied filter can be seen directly in the view being used.
Chapter XV. Free Period

1. DEFINITION

A Free period is a period free of events.

The Free Period Search detailed here includes two functionalities:

- A search for a Common Free Period for multiple resources, available only via the Schedule View. This is broken down into the following phases:
  1. filtering of resources with an event-free period of a certain type.
  2. position the planning view on the first free period common to these resources.

- The search for resources common to a given free period, available in Planning View and Resources View. The planning for resources resulting from a search contains an event-free period of a certain type.

In addition, the Duration of a Free Period may be calculated:

- for a Control Total column,
- for data to be calculated in an Events Report,
- to define the load and/or the objective for a workload.

2. USE

The configuration window for the free periods can be found in the Filter tab under the main menu:

The Filters > Free periods menu is used for two free period search functions:

Common free period

This functionality positions the user over a Planning View, at the start of the first free period common to a number of resources. These resources are defined by a filter.

A free period on a line of the Planning View is therefore a time period during which there are no events.
To use this functionality, you must choose:

- All events to be dealt with, using two filters: a resource filter in the chosen dimension and an events filter,
- The search period,
- The duration of the free period,

Determine the parameters then click on Validate to start the search.

**Filters**

```
Filter 'Staff': (All)
Events filter: (Current filter)
```

**“Dimension” filter**

This can be used to restrict the search for free periods to certain resources in the Dimension required. Simply:

- select an appropriate filter,
- to modify one,
- or even, to use a customized filter.

**Events filter**

This can be used to detail the free period as a function of the events defined by this filter.
Search period

You must here give the associated time period, which can be used to restrict a search.

If you choose a customized period, it is possible to create a period linked solely to this search for a free period.

The duration of the free period

The duration of the free period must, finally, be defined:

Value

This is a number representing the duration, in one of the units chosen below.

Unit

This duration may be expressed in:

- Day,
- Half-day,
- Hour,
Minute.

Worked
If this box is checked, those periods not worked are not counted in the duration and do not divide an existing free period.

Search dimensions
This functionality is used to search for resources common to a single free period. These contain an event-free period of a certain type.

To use this functionality, you must choose:
- All events to be dealt with, using two filters: a resource filter in the chosen dimension and an events filter,
- The search period,
- The duration of the free period,

Determine the parameters then click on Validate to start the search.

Filters

Resource filter
This can be used to restrict the search for free periods to certain resources in the Dimension required.
Simply:

■ select an appropriate filter,
■ to modify one,
■ or even, to use a customized filter.

Events filter

This can be used to detail the **free period** as a function of the **events** defined by this **filter**.

Search period

You must here give the associated **time period**, which can be used to restrict a search.

If you choose a **customized period**, it is possible to create a period linked solely to this search for a **free period**.

The duration of the free period

The duration of the free period must, finally, be defined:
Value
This is a number representing the duration, in one of the units chosen below.

Unit
This duration may be expressed in
- Day,
- Half-day,
- Hour,
- Minute.

Worked
If this box is checked, those periods not worked are not counted in the duration and do not divide an existing free period.

Discontinuous
This box, if checked, allows a search to be launched even if the free period is not continuous across the search period.

On duration or load
If the discontinuous box is checked, it is possible to choose whether the period being searched must be calculated based upon duration or load.

Control Total, Events Reports and load Plans
In the Control Totals, Events Reports and load Plans the durations of the free periods may be used as a basis for calculations.

In this case, the calculations are defined by:
- Calculation type: duration of free period (h) or duration of free period (d),
- Period type: All, public holidays, not worked, worked, or any other type of period created.

If the type of period chosen is *All* the calculation can only be calculated for periods worked.
Chapter XVI. Go to

1. DEFINITION

The Go To function is used to position the display over a resource, based upon the value of a heading. We distinguish:

- the positioning of the view, for a resource,
- the positioning of the planning at the start or end date of an event. (See Search)

This function is possible in the following views:

- Schedule View to go to a resource or an event,
- Resource View to go to a resource or an event,
- Events View, Gantt Events View, Kanban Events View to go to an event.

2. USE

Go to a resource

This is only possible for persistent headings.

This functionality is accessible by:

- Right click on a heading > Go to
- Right click on the view header > Go to

The following window appears:

![Go to window]

The select the various characteristics for the request, click on the Validate button to trigger the functionality.

**Heading**

This list shows all the headings for the dimension onto which the positioning can be carried out.
Editing data

**Condition**

Select a condition from the list of possibilities, depending on the type of heading:

- equal to,
- not equal to,
- contains,
- doesn't contain,
- starts with,
- doesn't start with,
- ends with,
- doesn't end with,
- greater than,
- less than,
- greater than or equal to,
- less than or equal to,
- is included in,
- is not included in.

**Value**

Enter the value for the search from the same type of heading.

**Go to an event**

This functionality is used to position the visible planning view at the start or end date of a given event.

It can be used:

- on an Events View,
- or, in the events tab of the properties window for a resource.

It can be accessed by **right clicking on an event > Go to > Start date or End date.**
The window closes and the planning is reset to the start date or end date of the event.
Chapter XVII. Highlight

1. DEFINITION

This functionality is accessible from the pop up menu, for a planning view, it is used to grey out all events not meeting the requirements of a given filter in order to improve the visibility of those that do.

For example, leave visible all those events belonging to a given project but grey out all events from other projects.

2. USE

From a Schedule View, the user should right click on the planning > highlight.

Then choose an Events Filter.

The events that do not meet the requirements of a selected filter are then shown in grey, thus highlighting those that do respect the filter.
To cancel this highlighting, simply re-run the function with the filter “All” or re-start the Favorite Display.
Chapter XVIII. Link

1. DEFINITION

A link is a directional relationship between two events, represented by a colored arrow. The first event is the master event, the second is the slave event.

Depending on the programmed behavior for the link, and its elasticity, any movements of the master event may lead to a movement of the slave event, alternatively it may trigger a warning on the incoherency of the movement.

Movements involving the slave event may be prevented, or a warning may be triggered for the incoherency of the movement.

2. CONFIGURATION

Creation of a link

The creation of a link is subject to user rights. If the user does not have the right to modify one of the events referenced by the link to be created, it will be impossible to actually create the link.

To create a link:

- Either: Drag the link from one event to another: Alt + Left click on an event, the release onto the slave event, after holding the left click down.
- Either: Select the whole chain, then Edit menu > Link blocks > Link events.

Double-click on the link created. The following window appears:

The default settings (behavior and Link mode) are those of the last link created, even if that took place during a previous VISUAL PLANNING session.
Link type

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

Behavior

- **Adjustment**: A movement of the master event will move the slave event.
- **Warning**: All movements are possible, but the link will change color if the time limit is no longer respected.
- **Constraint**: A movement of the master or slave events which does not respect the pre-defined time limits will trigger an error message.

Link mode

- **Strict time limit**: the spacing between the two events is equal to the defined time limit.
- **Minimum time limit**: the spacing between the two events is greater than or equal to the defined time limit.
- **Maximum time limit**: the spacing between the two events is less than or equal to the defined time limit.

Type limit type

- **Daily**: the limit is expressed as a number of days.
- **Hourly**: the limit is expressed in hours/minutes.

Delay

Select the limit value (positive or negative).

This value may be:

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

Modification to a link

The modification of a link is subject to user rights. If the user does not have the right to modify one of the events referenced by the link to be modified, it will be impossible to actually modify the link.
To modify the characteristics of a link:

- **Double-click on the link,**
- or **Right-click on the link > Modify.**

To modify the link mode:

- **Right click on the link > Link mode > Strict time limit or Minimum time limit.**

### Deleting a link

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

The deletion of a link is achieved by:

- Selecting the link the pressing the **DEL** key,
- **Right click on the link > Delete.**

### 3. USE

#### Visualization

The links are only visible in **Schedule View.**

It is possible to choose to either display or hide the links on a planning view via the menu **Display > Planning Block > See links.**

The screen shots below are taken for End-Start type links:

**Strict time limit**

The graphical representation, in planning view, of a link with a **Strict time limit link mode**, is as follows.

- **Adjustment mode or Warning mode respected**

![Adjustment mode or Warning mode respected](image)

- **Warning mode not respected**

![Warning mode not respected](image)
Minimum and Maximum time limits

The graphical representation, in planning view, of a link with a Minimum time limit link mode, is as follows:

- Adjustment mode or Warning mode respected

- Warning mode not respected

Respect links

This functionality is used to ensure that the gap between events is modified to meet the time limits. To activate for a link or link chain, right-click on the link or selected links > Link mode > Respect links.

Link information popup

By mousing over the link, a popup is shown:

```markdown
Links between events
- Link mode: Strict delay
- Delay type: Hourly
- Delay: 8h00
- Valid time: 0h00

Event from 8/10/2018 8:00 AM to 8/15/2018 6:00 PM

Clients-Zip: 20003
Tasks-Activity: Maintenance
Task Status-Status: Completed / To be invoiced
Order Status-Order Status: Yes

Event from 8/17/2018 8:00 AM to 8/23/2018 6:00 PM

Clients-Zip: 20910
Tasks-Activity: Review
Task Status-Status: Scheduled
Order Status-Order Status: Not received
```

Error message

If it is impossible to displace an event due to the links, the following message appears:
The links between events prevent the change.
Chapter XIX. Load

1. DEFINITION

This is one the characteristics of an event.

An event may represent a load of less than 100% of the time.

We can therefore distinguish:

- The period the task is carried out: generally represented by the duration
- The effective quantity of work to be produced: load

For example, the load may represent:

- a number of days/men,
- a number of parts/hour.

2. CONFIGURATION

The configuration involves initializing the load for an event.

The rules of creation

The rules of creation are used as the origin of the event load. This property is governed by the default load, which may be:

- Either undefined,
- Or based on a heading,
- Or a fixed value,
- Or the result of a calculation between two headings.

This property is also governed by the type of load, which may be:

- Either undefined,
- Or based on a heading,
- Or a value.

3. USE

The load can be used in a number of functionalities:
- load
- Control column Heading
- Events values heading
- Events Report
- Filter
Chapter XX. Overlap of events

1. DEFINITION

In the planning view, when several events overlap a single planning line, we speak of an overlap of events.

2. USE

Opening/closing an overlap

The existence of an overlap of resources is highlighted by the appearance of a small arrow, to the left of the resource.

By clicking on this arrow the overlap is:

- either closed: the events are superimposed,

- or opened: the resource is expanded as far as necessary so that all overlapping events are visible.

Opening/closing all overlaps

The “master” arrow to the top left of the lines allows the user to open or close all overlaps in a single operation.
NB: The position of this “master” arrow is logged in the Favorites display.

Prevention of overlaps

Finally, it is possible to prevent or restrict overlaps, creating Constraints for this purpose.
Chapter XXI. Pop-up menu

1. DEFINITION

A pop-up menu is a menu that appears after right clicking on a resource, an event, or even a date. This menu changes dependent on the view displayed and the element you right-click on. Certain elements within these menus may be greyed out, depending on previous actions taken by the user.

2. RESOURCES VIEW

Pop-up menu for the header of the view

This menu can be found by right-clicking on the header of the heading or dimension.

- Add: Add a new resource,
- Search: Search for a resource using the value of one of its headings,
- Go to: Position the line over a given resource (See Go to),
- Adjust width: Change the width of the heading or all headings,
- Sort: Sort headings using a specific heading. This option is only available in Table mode,
- Header height: used to increase header heights by multiplying them by 2, 3 or 4,
- Mode: used to change the display mode (tree or list),
- Existing resource filters for the corresponding dimension: See Resource filter,
Editing data

- Automatic filters: See Automatic filter,
- View all: Used to display all resources,
- Search free periods: See Free Period,
- Print: See Print,
- Display settings: modify the display settings for the view.

Pop-up menu for resources

This menu can be seen by right-clicking on a resource.

- Modify: The modification may be made using the editor (default) or a pre-configured and selected resource editor,
- Modify the value: in a tabular resource view, used to modify the value of the heading of any selected resources,
- Forum: gives access to the resource forum,
- Assign a calendar: used to display an hourly or daily calendar,
- Complete free periods: for a given free period, it is possible to fill any free periods not containing events. To do this, the following screen is displayed:
Then, simply select:

1. The time period into which the events are to be fitted,
2. The events filters to be applied,
3. The hierarchy to be used in the creation of the events,
4. If the insertion of events is to be completed using **Per free period** or **per unit in free period**.

- Print: See [Print](#),
- Add: Add a new resource,
- Duplicate: Duplicate a resource,
- Deletion: Delete the selected resource(s),
- Filter the selection: Used to filter the view of the selected resources,
- Filter events: Used to filter the events for the selected resources,
- Resources export: Use to trigger a resource export context,
- Import resources: Used to trigger a resource import context,
- Send mail: Used to send an e-mail or PDF planning for a resource,
- Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See [Geolocalization](#).

### 3. SCHEDULE VIEW

**Pop-up menu of the heading headers**

This menu can be found by right-clicking on the header of the heading or dimension.
- Add: Add a new resource,
- Search: Search for a resource using the value of one of its headings,
- Go to: Position the line over a given resource (See Go to),
- Adjust width: Change the width of the heading or all headings,
- Sort: Sort headings using a specific heading,
- Header height: used to increase header heights by multiplying them by 2, 3 or 4,
- Mode: used to change the display mode (tree or list),
- Existing resource filters for the corresponding dimension: See Resource filter,
- Automatic filters: See Automatic filter,
- View all: Used to display all resources,
- Search free periods: See Free Period,
- Enter a common value: activated if a heading is clicked upon and used to enter the same value across all resources for the selected heading,
- Display settings: modify the display settings for the view.
Pop-up menu for resources

This menu can be seen by right-clicking on a resource.

- **Modify**: The modification may be made using the editor *(default)* or a pre-configured and selected resource editor,
- **Modify the value**: used to modify the value of the heading of any selected resources,
- **Forum**: gives access to the resource forum,
- **Assign a calendar**: used to display an hourly or daily calendar,
- **Complete free periods**: for a given free period, it is possible to fill any free periods not containing events,
- **Add**: Add a new resource,
- **Duplicate**: Duplicate a resource,
- **Deletion**: Delete the selected resource(s),
- **Filter the selection**: Used to filter the view of the selected resources,
- **Filter events**: Used to [filter the events](#) for the selected resources,
- **Resources export**: Use to trigger a resource export context,
- **Import resources**: Used to trigger a resource import context,
- **Send mail**: Used to send an e-mail or PDF planning for a resource,
Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.

Pop-up menu for events

This menu can be seen by right-clicking on an event.

- Modify: The modification may be made using the editor (default) or a selected events editor,
- Duplicate: Duplicate an event,
- Shift: Shift an event: See Shifting,
- Divide: used to divide an event into 2. The duration of each event will depend on where the mouse is positioned,
- Repeat: used to repeat an event: See Repeat an event
- Compress: used to compress events: See Compress an event
- Assign a resource from one dimension to an event,
- Automatic achievement and achievement: used to modify the achievement measurement of to modify the completion percentage for the event,
- Respect links: used to modify the events so as to ensure that they respect the parameters of the links,
- Extend the selection horizontally/vertically: used to select events horizontally or vertically,
- Select events 'hierarchy': it is possible to select events of the same level, or child event, if they exist in vertical hierarchies.
- Select related events: used to select the events linked to a selected event,
- Filter the resources for the selection: used to filter resources from other dimensions used in the creation of the event,
- Copy/Cut/Paste: used to copy/cut and/or paste an event,
- Deletion: Delete the selected event(s),
- Print: See Print,
- Export Events: Use to trigger an event export context,
- Import events: Used to trigger an event import context,
- Merge: used to automatically merge the event using a created context: See Merge
- Send mail: Send a mail using the created context,
- Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.
- Send SMS: used to transmit an SMS using the context created: See Send SMS

**Context sensitive menu for the header of the schedule view**

This menu can be found by right-clicking on the header of the planning.
■ Scale: used to modify the scale of the planning period,
■ Scroll: used to modify the scroll method used on the planning: continuous, day, week, month or year,
■ See days not worked: used to display/hide non-working days,
■ See night time hours: used to limit (or not) the planning views to the limitations of a working day,
■ Display week: displays the week numbers on the planning,
■ Events filters: See Events filter,
■ Filters of the resources for a dimension: See Resource filter,
■ See all: used to display all the events,
■ Common free period: used to show common free periods,
■ Print: See Print,
■ Display settings: modify the display settings for the view.

**Pop-up planning menu**

This menu can be seen by right-clicking on the planning.
- Copy/Cut/Paste: used to copy/cut and/or paste an event,
- Add an event: Add a new event to the planning,
- Events filters: See Events filter,
- Dimensions filter: See Resource filter,
- See all: used to display all the events,
- Highlight: used to highlight certain elements by greying out others: See Highlight,
- Common free period: used to show common free periods,
- Print: See Print,
- Display settings: modify the display settings for the view.

Pop-up menu for links

This menu is accessible by right clicking on a link between events.
■ Modify: used to modify the parameters of a link,
■ Link mode: used to modify the link mode,
■ Respect links: used to respect links,
■ Delete: used to delete links.

4. DIARY VIEW

Pop-up menu for the header of the view

This menu can be found by right-clicking on the header of the diary.
■ Mode: used to modify the display mode: monthly, weekly, working week, daily,
■ Scale: used to modify the time scale for the view (not active in the Monthly mode),
■ See nighttime hours: used to restrict (or not) the diary view to the limitation of showing the working day (not active in the Monthly mode),
■ Filters of the resources for a dimension: See Resource filter,
■ Automatic filters: See Automatic filter,
■ See all: used to display all resources,
■ Events filters: See Events filter,
■ Filter resources from other dimensions: See Resource filter,
■ See all: used to display all the events,
■ Print: See Print,
■ Display settings: modify the display settings for the view.

Pop-up menu for events

This menu can be seen by right-clicking on an event.
Modify: The modification may be made using the editor (default) or a selected events editor,
Duplicate: Duplicate an event,
Shift: Shift an event: See Shifting,
Divide: used to divide an event into 2. The duration of each event will depend on where the mouse is positioned,
Repeat: used to repeat an event: See Repeat an event
Compress: used to compress events: See Compress an event
Assign a resource from one dimension to an event,
Automatic achievement and achievement: used to modify the achievement measurement of to modify the completion percentage for the event,
Select events 'hierarchy': it is possible to select events of the same level, or child event, if they exist in vertical hierarchies.
Copy/Cut/Paste: used to copy/cut and/or paste an event,
Deletion: Delete the selected event(s),
Print: See Print,
Export Events, Use to trigger an event export context,
Import events: Used to trigger an event import context,
Merge: used to automatically merge the event using a created context: See Merge
Send mail: Send a mail using the created context,
Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.
Send SMS: used to transmit an SMS using the context created: See Send SMS

Pop-up diary menu

This menu can be seen by right-clicking on the diary.
- Copy/Cut/Paste: used to copy/cut and/or paste an event,
- Filters of the resources for a dimension: See Resource filter,
- Automatic filters: See Automatic filter,
- See all: used to display all resources,
- Events filters: See Events filter,
- Filter resources from other dimensions: See Resource filter,
- See all: used to display all the events,
- Print: See Print,
- Display settings: modify the display settings for the view.
5. EVENTS VIEW

Pop-up menu for the view

This menu can be found by right-clicking on the header of the view.

- Filters of the resources for a dimension: See Resource filter,
- Automatic filters: See Automatic filter,
- See all: used to display all resources,
- Events filters: See Events filter,
- Choice of period: see Time period,
- Filter resources from other dimensions: See Resource filter,
- See all: used to display all the events,
- Print: See Print,
- Display settings: modify the display settings for the view.

Pop-up menu for events

This menu can be seen by right-clicking on an event.
Modify: The modification may be made using the editor (default) or a selected events editor,

Duplicate: Duplicate an event,

Add an event: Add a new event,

Shift: Shift an event: See Shifting,

Divide: used to divide an event into 2. The duration of each event will depend on where the mouse is positioned,

Repeat: used to repeat an event: See Repeat an event

Assign a resource from one dimension to an event,

Automatic achievement and achievement: used to modify the achievement measurement of to modify the completion percentage for the event,

Go to: Position the line over a given event (See Go to),

Filter the selection: used to filter the view using the selected events
Select events 'hierarchy': it is possible to select events of the same level, or child event, if they exist in vertical hierarchies.

- Copy/Cut/Paste: used to copy/cut and/or paste an event,
- Deletion: Delete the selected event(s),
- Compress: used to compress events: See Compress an event
- Print: See Print,
- Export Events, Use to trigger an event export context,
- Import events: Used to trigger an event import context,
- Merge: used to automatically merge the event using a created context: See Merge
- Send mail: Send a mail using the created context,
- Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.
- Send SMS: used to transmit an SMS using the context created: See Send SMS

Pop-up menu for the heading header

This menu can be found by right-clicking on the heading header.
■ Search: Search for an event using the value of one of its attributes,
■ Sort: Sort events using a displayed attribute,
■ Adjust width: Adjust the column width
■ Header height: used to increase header heights by multiplying them by 2, 3 or 4,
■ Mode: used to change the display mode for events (tree or list),
■ Existing resource filters for the corresponding dimension: See Resource filter,
■ Automatic filters: See Automatic filter,
■ Events filters: See Events filter,
■ See all: used to display all resources for a dimension,
■ Choice of period: see Time period,
■ Filter resources from other dimensions: See Resource filter,
■ See all: used to display all resources for a dimension,
■ Print: See Print,
■ Display settings: modify the display settings for the view.

6. GANTT EVENTS VIEW

Pop-up menu for the header of the view

This menu can be found by right-clicking on the header of the view.

■ Existing resource filters for the corresponding dimension: See Resource filter,
■ Automatic filters: See Automatic filter,
■ View all: Used to display all resources,
■ Events filters: See Events filter,
Editing data

- Choice of period: see Time period,
- Filter resources from other dimensions: See Resource filter,
- See all: used to display all resources for a dimension,
- Print: See Print,
- Display settings: modify the display settings for the view.

Pop-up menu of the column headers

This menu can be found by right-clicking on the event column header.

- Search: Search for an event using the value of one of its attributes,
- Sort: Sort events using a displayed attribute,
- Adjust width: Adjust the column width
- Header height: used to increase header heights by multiplying them by 2, 3 or 4,
- Mode: used to change the display mode for events (tree or list),
- Existing resource filters for the corresponding dimension: See Resource filter,
- Automatic filters: See Automatic filter,
- Events filters: See Events filter,
- See all: used to display all resources for a dimension,
Choice of period: see Time period,
Filter resources from other dimensions: See Resource filter,
See all: used to display all resources for a dimension,
Print: See Print,
Display settings: modify the display settings for the view.

Pop-up menu for events

This menu can be seen by right-clicking on an event.

Modify: The modification may be made using the editor (default) or a selected events editor,
Duplicate: Duplicate an event,
Add an event: Add a new event,
Shift: Shift an event: See Shifting.
- Divide: used to divide an event into 2. The duration of each event will depend on where the mouse is positioned,
- Repeat: used to repeat an event: See Repeat an event
- Assign a resource from one dimension to an event,
- Automatic achievement and achievement: used to modify the achievement measurement of to modify the completion percentage for the event,
- Go to: Position the line over a given event (See Go to),
- Filter the selection: used to filter the view using the selected events
- Select events 'hierarchy': it is possible to select events of the same level, or child event, if they exist in vertical hierarchies.
- Copy/Cut/Paste: used to copy/cut and/or paste an event,
- Deletion: Delete the selected event(s),
- Compress: used to compress events: See Compress an event
- Print: See Print,
- Export Events, Use to trigger an event export context,
- Import events: Used to trigger an event import context,
- Merge: used to automatically merge the event using a created context: See Merge
- Send mail: Send a mail using the created context,
- Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.
- Send SMS: used to transmit an SMS using the context created: See Send SMS

Pop-up menu for the header of the planning view

This menu can be found by right-clicking on the header of the planning.

![Pop-up menu](image)
■ Scale: used to modify the scale of the planning period,
■ Scroll: used to modify the scroll method used on the planning: continuous, day, week, month or year,
■ See days not worked: used to display/hide non-working days,
■ See night time hours: used to limit (or not) the planning views to the limitations of a working day,
■ Display week: displays the week numbers on the planning,
■ Events filters: See Events filter,
■ Highlight: used to highlight certain elements by greying out others: See Highlight,
■ Common free period: used to show common free periods,
■ Print: See Print,
■ Display settings: modify the display settings for the view.

7. KANBAN EVENTS VIEW

Pop-up menu for the header of the view

This menu can be found by right-clicking on the header of the view.

■ Existing resource filters for the corresponding dimension: See Resource filter,
■ Automatic filters: See Automatic filter,
■ View all: Used to display all resources,
■ Events filters: See Events filter,
■ Choice of period: see Time period,
■ Filter resources from other dimensions: See Resource filter,
■ See all: used to display all resources for a dimension,
- Print: See Print,
- Display settings: modify the display settings for the view.

Pop-up menu for events

This menu can be seen by right-clicking on an event.

- Modify: The modification may be made using the editor (default) or a selected events editor,
- Duplicate: Duplicate an event,
- Add an event: Add a new event,
- Shift: Shift an event: See Shifting,
- Divide: used to divide an event into 2. The duration of each event will depend on where the mouse is positioned,
- Repeat: used to repeat an event: See Repeat an event
Assign a resource from one dimension to an event,

Automatic achievement and achievement: used to modify the achievement measurement of to modify the completion percentage for the event,

Go to: Position the line over a given event (See Go to),

Filter the selection: used to filter the view using the selected events

Select events 'hierarchy': it is possible to select events of the same level, or child event, if they exist in vertical hierarchies.

Copy/Cut/Paste: used to copy/cut and/or paste an event,

Deletion: Delete the selected event(s),

Compress: used to compress events: See Compress an event

Print: See Print,

Export Events, Use to trigger an event export context,

Import events: Used to trigger an event import context,

Merge: used to automatically merge the event using a created context: See Merge

Send mail: Send a mail using the created context,

Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.

Send SMS: used to transmit an SMS using the context created: See Send SMS

8. EVENTS MAP VIEW

Pop-up menu for the header of the view

This menu can be found by right-clicking on the header of the view.
■ Existing resource filters for the corresponding dimension: See Resource filter,
■ Automatic filters: See Automatic filter,
■ View all: Used to display all resources,
■ Events filters: See Events filter,
■ Choice of period: see Time period,
■ Filter resources from other dimensions: See Resource filter,
■ See all: used to display all resources for a dimension,
■ Print: See Print,
■ Display settings: modify the display settings for the view.

Pop-up menu for events

This menu can be seen by right-clicking on an event.
- Modify: The modification may be made using the editor (default) or a selected events editor,
- Duplicate: Duplicate an event,
- Add an event: Add a new event,
- Shift: Shift an event: See Shifting,
- Divide: used to divide an event into 2. The duration of each event will depend on where the mouse is positioned,
- Repeat: used to repeat an event: See Repeat an event
- Assign a resource from one dimension to an event,
- Automatic achievement and achievement: used to modify the achievement measurement of to modify the completion percentage for the event,
- Go to: Position the line over a given event (See Go to),
- Filter the selection: used to filter the view using the selected events
- Select events 'hierarchy': it is possible to select events of the same level, or child event, if they exist in vertical hierarchies.
- Copy/Cut/Paste: used to copy/cut and/or paste an event,
- Deletion: Delete the selected event(s),
- Compress: used to compress events: See Compress an event
- Print: See Print,
- Export Events, Use to trigger an event export context,
- Import events: Used to trigger an event import context,
- Merge: used to automatically merge the event using a created context: See Merge
- Send mail: Send a mail using the created context,
- Geolocation: See the GPS position, the track between one GPS position to another, calculate the localization of a resource: See Geolocalization.
- Send SMS: used to transmit an SMS using the context created: See Send SMS

Context-sensitive menus of the events zone

This menu can be displayed by right-clicking on a zone free of events in the right hand side of the events map view.

- Add an event: Add a new event by selecting an existing hierarchy.
9. EVENTS REPORT VIEW

Pop-up menu for the view

This menu can be found by right-clicking on the header of the view.

- **Modify**: used to access the configuration of the **events report**,
- **Events Report**: Used to select the Events Report to display,
- **Display Type**: Used to select the display type for the events report,
- **Resource filter**: used to **filter resources**. This functionality is only active in the events report configuration, the resource filter is the **current filter**,
- **Events filter**: Used to **filter the events**. This functionality is only active in the events report configuration, the events filter is the **current filter**,
- **Choice of period**: see **Time period**. This functionality is only active in the events report configuration, the period selected is the **current filter**,
- **Print**: See **Print**,
- **Export the events report**: used to export the events report to a file or database.
Chapter XXII. Private

1. DEFINITION

The notion **private** is available for:

- **Favorite Displays**
- **Event reports**
- **Resource** and **events filters**

This functionality is related to a user profile, and allows the user to save parameters for a strictly private usage. Other users have no access to favorites displays, events reports and resource/events filters, which have been marked as being private to another user.

When the **private** box is checked for one of the previously mentioned cases, it is displayed in italics:

Only the Super Administrator can have access to the favorites displays, the events reports and the resources/events filters made private by any planning user.

He can see these private elements and identify them using specific nominative information in italics: **Name of private element-user name**

Example: **privatefilter~user1**
Chapter XXIII. Refresh

1. DEFINITION

This deals with refreshing the data displayed by VISUAL PLANNING to take into account any modifications made by other users.

This refresh function only works with the ENTERPRISE version.

This only effects the data. This does not effect:

- display parameters, favorite displays, views, etc.
- structural elements: dimensions, headings, formulas, etc.

2. USE

In VISUAL PLANNING, the modifications to data are saved in real time to the database.

There is therefore no need to save modifications.

Modifications to an event or a resource are saved to the database as the modification is validated.

A user who applies a modification sees this modification directly.

However, they do not see modifications made by other users. This is the purpose of the data refresh function.

This refresh operation may be either manual and / or automatic.

Manual refresh

The rapid access bar has the button 😊.

This button is used to refresh the display according to the various modifications made by other users.

Another method used to refresh the display is the F5 button on the keyboard.

Automatic refresh

It is possible for a user to choose the frequency of the updates on his workstation by clicking on the arrow to the right of the button.

This delay is initially set to 15 minutes.

For a configuration with multiple users, it is recommended not to select too short a delay to prevent saturating the server.
Common update delay

It is possible to define a common refresh delay to be applied to all users of the same server.

This parameter is accessible via the general settings in the Admin Center.
Chapter XXIV. Repeating an event

There are three types of repetition within VISUAL PLANNING:

- Horizontal repeat,
- Vertical repeat,
- Repeat on selection.

1. Horizontal repeating of events

It is possible to repeat, over time, the selection of one or more events. It is also possible to repeat child events.

To do this, right click on a selection of events > Repeat > Horizontally.

The following window opens:

![Horizontal repeat window](image)

Every

Select the repetition period. This period may be in numerical quantities for:

- Year,
- Semester,
- Quarter,
- Month,
- Week,
- Day,
- 1/2 Day,
- 1/3 Day,
- 1/4 Day,
- Hour,
- 1/2 hour,
- 1/4 hour,
- 10 minutes,
- 5 minutes.

**Worked**

If checked the **Worked** box allows the period, defined above, to apply to working days only.

**Same day**

If checked, the **Same Day** box applies repetitions **every month** on the same day of the month.

Example: *Each first Monday of the month*

**Repeat until**

Define the end date for the repetition. In this case there is no need to detail the number of repetitions.

**Number of repetitions**

Define the number of repetitions. In this case there is no need to detail the end date for repetitions.

**Parameters**

**Repeating group**

It is possible to create a repeating group for newly created events.

This functionality allows the user to assign a “grouped” attribute to all events created within this repetition.

From this moment onwards, when editing an event belonging to such a group, a dialogue box asks the logged on user whether the edit should be applied to the selected event only or to all events in the group.

In the case that all events are to be edited, the edit fields for the dates and durations are deleted from the dialogue box. During validation, all modifications are then propagated to all events within the group.
A modification to the duration of an event, by drag and drop methods, only modifies the selected event, even if it is part of a repeating group.

An event belonging to a repeating group cannot be cut, compressed, divided nor repeated.

**Repeating a note, a formula, valuation items**

It is also possible to choose several characteristics which cannot be repeated in newly created events. These characteristics are:

- The note,
- the formula,
- the valuation items.

**Worked events**

For the repetitions of at least one repeating event, you must define the behavior to be accepted by the horizontal repetition.

There are three possible cases when a worked event must be created during an unworked period:

- Non-creation of a repeat event,
- Creation of a repeat event during the closest possible future worked period,
- Creation of a repeat event during the closest possible past worked period.

**2. Vertical repeating of events**

In a planning view it is possible to repeat, to other visible resources, a selection of one or more events. To do this, **right click on a selection of events > Repeat > Vertically**.

The following window opens:
Repeating group

It is possible to create a repeating group for newly created events.

This functionality allows the user to assign a “grouped” attribute to all events created within this repetition.

From this moment onwards, when editing an event belonging to such a group, a dialogue box asks the logged on user whether the edit should be applied to the selected event only or to all events in the group.

In any case where all events are modified, the edit field for the resource and principal dimension is deleted from the dialogue box. During validation, all modifications are then propagated to all events within the group.

Modifications to the duration of an event, using the drag and drop method, then modifies all events in the repeating group.

An event belonging to a repeating group cannot be cut, compressed, divided nor repeated.

Repeating a note, a formula, valuation items

It is also possible to choose several characteristics which cannot be repeated in newly created events.

These characteristics are:

- The note,
- the formula,
- the valuation items.

3. Repeating events from a selection

In a planning view, it is possible to repeat, vertically, one or more events, to a selection of resources.

To do this, right click on a selection of events > Repeat > To selection.

The following window opens:
Repeating group

It is possible to create a repeating group for newly created events.

This functionality allows the user to assign a “grouped” attribute to all events created within this repetition.

From this moment onwards, when editing an event belonging to such a group, a dialogue box asks the logged on user whether the edit should be applied to the selected event only or to all events in the group.

In any case where all events are modified, the edit field for the resource and principal dimension is deleted from the dialogue box. During validation, all modifications are then propagated to all events within the group.

Modifications to the duration of an event, using the drag and drop method, then modifies all events in the repeating group.

An event belonging to a repeating group cannot be cut, compressed, divided nor repeated.

Repeating a note, a formula, valuation items

It is also possible to choose several characteristics which cannot be repeated in newly created events.

These characteristics are:

- The note
- the formula,
- the valuation items.
Selecting resources

The resource selection window then opens. Select the resources to which the repetition is to be applied and click on OK to start the repetition.
Chapter XXV. Searches

1. DEFINITION

Searches are used to select:

- Resources, based upon the values of one or more headings: This function is possible in both Planning and Resource Views.
- The events, dependent on the value of one their attributes or dimension heading associated: This function is possible in an Events View.

Identification of resources or events using the “search” function on persistent headings.

We distinguish:

- a search for resources or events using the “search function, which is the objective here,
- a search for resources or events using the “Go to” function,
- a search for free periods,
- a quick, “full text” search.

2. USE

“Search” function

The search for resources or events can be accessed by:

- a simple right click on a heading or attribute > Search,
- a right click on the header of the view > Search,
- or, directly using the Search button in the resource selection window.

The following window appears:

Then choose the different request characteristics, then click on the button:

- Press Apply to start the search, then repeat the search again straight afterwards,
■ **Validate** to start the research but close the window.

**Heading**
This list shows all the headings for the dimension the search can be carried out using.

**Condition**
Select a condition from the list of possibilities, depending on the type of heading:
- equal to,
- not equal to,
- contains,
- doesn't contain,
- starts with,
- doesn't start with,
- ends with,
- doesn't end with,
- greater than,
- less than,
- greater than or equal to,
- less than or equal to,
- is included in,
- is not included in.

**Value**
Enter the value for the search from the same type of heading.

In addition, there are two options:

**Add to visible results**
If this box is checked, the resources found are added to the list of already displayed resources.

**Search visible results only**
If this box is checked, the resources found are chosen from the previously displayed resources. Those not already displayed remain excluded.

**Quick, “full text” search**
It is possible to carry out searches directly on all displayed elements in a tabular view (resource or events views).
To do so:

- either **click on the magnifying glass** at the top of the view, and enter the characters you wish to search for in the window that appears,
- or, use the keyboard shortcut **CTRL+F** to show the search window in the top right of the screen.

The search takes into account the elements contained within the view.

---

The “full text” search function cannot be used on a Planning View.
Chapter XXVI. Selection

1. DEFINITION
The selectable data in VISUAL PLANNING includes resources, events and links.

2. RESOURCES
Selected as a resource
The selection of a resource involves simply clicking on it.

Selecting multiple resources
It may be useful to be able to select multiple resources, in order to be able to then apply a common processing: move them, delete them, modify their properties, etc.

There are various methods available to select multiple resources. They can be combined together.

CTRL + left click
The simplest method is to left click in order to select the first resource, then clicking on the following resources whilst holding the CTRL button on the keyboard down.

Ctrl + A
It is possible to select all resources visible on a display.

This view may be:
- a Planning View,
- or, a Resources View.

To do this, simply select, within this view, the section that contains the resources and press Ctrl + A.

Using filters to make a selection
To modify or delete all resources with a certain characteristic, simply apply a filter displaying only these resources before selecting them all and applying the modification.

Those resources not displayed using the filter are saved from the operation.

Resource selection window
See Assignment
3. EVENTS

Selecting an event

The selection of an event involves simply clicking on it.

Selecting multiple events

It may be useful to be able to select multiple events, in order to be able to then apply a common processing: move them, delete them, modify their properties, etc.

There are various methods available to select multiple resources. They can be combined together.

CTRL + left click

The simplest method is to left click in order to select the first event, then clicking on the following events whilst holding the CTRL button on the keyboard down.

Selecting by rectangle

To do this, left click to select the event in the top left of the rectangle to be selected, then click on the event in the bottom right whilst holding down the shift key.

This selection is restricted to the events rendered visible by any active filters.

Extending a selection

Right click on one of the selected events.

The context-sensitive menu proposes:

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

These extensions to the selection are restricted to the events rendered visible by any active filters.

Ctrl + A

It is possible to select all the events visible on a display.

This view may be:

- a Planning View,
- a Diary View,
- a Gantt Events View,
- or, an Events View.
To do this, simply select, within this view, the section that contains the events and press Ctrl + A.

For Planning Views and Events Views, this selection takes into account all events that respect the filters used by the View and included within the time period defined by the view.

Using filters to make a selection

To modify or delete all events with a certain characteristic, simply apply a filter displaying only these events before selecting them all and applying the modification.

Any events excluded by this filter are saved.

Selecting related events

When using links, it is possible to apply a selection to all events connected by links.

To do this, right-click on an event > Select linked events

4. LINKS

Selecting a link

The selection of a link involves simply clicking on it.

Selecting multiple links

It may be useful to be able to select multiple links, in order to be able to then apply a common processing.

CTRL + left click

The simplest method is to left click in order to select the first link, then clicking on the following links whilst holding the CTRL button on the keyboard down.
Chapter XXVII. Shifting

1. DEFINITION
The shifting of events is used to modify the start date for a selection of events.
This functionality is particularly useful for a shift over a large time scale.

2. USE
After having made a selection of one or more events, it is possible to shift them. There are several methods available to carry out this action.

Drag and Drop
It is possible to achieve this shift using a drop and drag within a planning view.
This type of modification is above all suitable for changes over a short period.
If the event’s resources change during this drag and drop operation, then the creation rules are re-applied.
The movement may not be possible, depending on:
■ hierarchies,
■ constraints,
■ user rights.

Properties of the event
By right-clicking on the event > Properties or even by double-clicking on the event it is possible to modify the start date, which causes the movement of the validation.
For a multiple selection, all the events are positioned at the same start date.
The resource are not modified, and thus the creation rules are not recalculated.
The movement may not be possible, depending on:
■ hierarchies,
■ constraints,
■ user rights.

Shift
Finally, it is possible to carry out this movement operation using a dedicated functionality.
This functionality does not modify the resources, and thus the creation rules are not recalculated. The movement may not be possible, depending on:

- hierarchies,
- constraints,
- user rights.

To use this functionality, **right-click on a selection of events > Shift**

The following window opens:

The shift dropdown list provides two values, allowing two different behaviors:

- To a date,
- On an interval.

**Shift to a date**

Used to move all selected events.

In this case, you must give:

- The start day
- The start time (for hourly events only).

The specified date is the start date for the event, selected by a right click.

**Shift on an interval**

This is used to move all selected events to an identical time interval.

The time gap between events is preserved, unless the calendars need them to be modified.

In this case, you must give:
The direction of the movement:
- forwards,
- backwards.
Number of days,
Number of hours (for hourly events only),
Number of minutes (for hourly events only),
Worked or not.
Chapter XXVIII. Sort

1. DEFINITION

The sorting of data is defined as a method for organizing elements in a resource or events table.

Other sorting operations may be applied during the configuration operation, generally effecting the ordering of values in a single choice drop down list or a multiple choice list.

2. USE

Data sorting in table mode

This functionality involves:

■ the sorting of resources within a Schedule view,
■ the sorting of resources within a Resource view in tabular mode,
■ the sorting of events within an Events view or Gantt events view in tabular mode.

The sorting is alphabetical for text and in increasing order for numerical data.

For a single choice list, the sorting order is based upon the order the values are defined using. (See Sorting elements in a list)

In this case, the sorting of the table can be seen using the small symbol: which represents sorting using the heading with this symbol.

This type of sort is carried out on the heading with the symbol, then in the event of two identical items, the sorting is based upon the heading to the right, and so on.

We can therefore sort using all persistent headings visible on the table, as well as with calendars and creation rules.

It should be noted that the order of headings is very important to the sort results.

The reversed symbol signifies an reverse order alphabetical sort for text, with decreasing numbers for a numerical sort.

To sort, either:

■ Right click on a column heading > Sort,
■ Double click on the right hand side of the column heading.
Saving

A sorting operation of this type can be saved to a favorite display.

Sorting elements in a list

For headings configured as a single or multiple choice list, when defining calendars or, in general, during the configuration of VISUAL PLANNING, you can apply a manual sorting to elements in a list using the following blue arrows:

It is also sometimes possible to automatically sort elements in a list using a Sort button.
Chapter XXIX. Undo / Redo

1. DEFINITION

When using VISUAL PLANNING the user creating a plan may undo any modifications made:

- Modification to resources,
- Modification to events,
- Modification to links,
- or, Modification to calendars.

All modifications in a session can be undone if no structural change (outside the calendar) has been made.

---

This function is available as long as it has not been deactivated in the Admin Center.

---

2. USE

From the rapid access menu bar, access to this function is via buttons:

![Undo/Redo buttons]

**Undo**

Clicking on the arrow \( \leftarrow \rightarrow \) is used to undo the last modification.

The list of modifications that can be undone is accessible by right clicking on the arrow:
You can then choose the number of undo levels to apply.

**Redo**

You can replace the cancelation (undo) using the redo function.

Clicking on the arrow is used to undo the last modification.

The list of undo levels that can be re-established is accessible by right clicking on the arrow:

We can then select the number of modifications to re-establish.
Chapter XXX. Worked

1. DEFINITION

the notion of Worked can be found throughout VISUAL PLANNING. It is used as an “overlay” on the planning grille.

This is used by events, by period types including those applied to calendars.

2. USE

The type of period worked

A type of period worked is used to position worked events or calendars.

It is also possible to define the value of a coefficient for each period worked. This coefficient will be used in valuation items.

See Period type

Event worked

A Worked Event can only be positioned within a Worked Period of Time.

In the majority of cases, events must be worked.

See Event