General introduction
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Chapter I. Why use VISUAL PLANNING

Dashboard, decision making support tool...

Originally, VISUAL PLANNING was based upon wall paintings, therefore it still has a “manual” feel to the presentation and management of events.

*But today, it goes much further!*

VISUAL PLANNING meets the requirements of businesses for scheduling and operational management. Used by working groups to manage and oversee, in real time, their resources, teams, clients etc. It is therefore an essential “dashboard” of your enterprise.

More than just a wall calendar, or a personal productivity program, VISUAL PLANNING is a tool to support decision making, employing the following characteristics, reunited in an exceptional format:

1. UNIVERSALITY

VISUAL PLANNING IS TOTALLY CONFIGURABLE. It has been chosen by thousands of enterprises across a wide range of enterprises of different sizes.

You can simultaneously handle your teams, clients, projects and resources, as you need them.

2. FACILITY OF USE ON A DAY TO DAY BASIS

The graphical user interface provides an immediate overview of the information.

Its icons, its drag and drop facility, combine to render use of the software intuitive and easy for all.

Despite the sheer number of functions, VISUAL PLANNING, once configured, is mainly used by simply sliding icons around with your mouse, and calling up favorite displays which are in direct relationship with the requirement being handled, by clicking a list.

VISUAL PLANNING is used on a daily basis by personnel with no IT training or experience.

3. COLLABORATIVE WORK

All users (both local and remote) connected to a VISUAL PLANNING server can simultaneously view or modify the same, shared schedule.

The management functions and user rights are used to define and restrict the access rights for each user of the various schedules, both in terms of reading (confidentiality) and writing (security).

4. DECISION MAKING SUPPORT

The filters, defined in accordance with your criteria, are called up by a single click: you can therefore research the resources with the characteristics and availability for the required task.
You can also valorize the tasks using multiple criteria of choice, calculate, in real time, costs, income and labor costs, in order to control budgets, invoicing elements, time spent, vacation time, weekly working time, etc.

The analysis functions can be used to display all sorts of cross table, analyzing the activities, then printing them out and making the most of these tables.

Indicators (control totals) displayed on the schedule, allowing you to measure, instantaneously, the consequence of your schedule.

A schedule for each resource is also available with a single click:

For example, if you schedule the assignment of personnel to a worksite, you can simultaneously show the scheduling for the personnel and the progress of the worksite.

Links between events and constraints increase the power and operational safety of VISUAL PLANNING.

5. MULTIPLE OPERATING SYSTEMS

VISUAL PLANNING can be used on all Windows based Operating Systems (XP or superior) and all compatible networks, including LINUX platforms.

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

The VISUAL PLANNING range includes two versions: ONE and ENTERPRISE.

To find out more, log onto the site https://www.visual-planning.com.
Chapter II. Basic concepts and definitions

Here are the basic elements and the terminology used in the menus and in the help for VISUAL PLANNING.

1. MAIN WINDOW

The Main Window of VISUAL PLANNING is presented in the following manner:

See Main window

2. Resources

VISUAL PLANNING resources represent the entities requiring scheduling.

Dependent on the configuration applied, these may be personnel, equipment, clients, worksites, projects, rooms, etc.

See Resource

3. Headings

These resources are sub-divided into columns, which we call headings in Visual Planning.
General introduction

These headings are defined during the initial configuration, which provides information on each resource.

For example:

- For personnel, one could configure one heading for the name, others for the role, department, telephone number, registration no., etc.
- For equipment, depending on requirements the headings could include the ID, weight, capacity, localization, etc.

See Heading

4. Schedule

The schedule is a time grid, onto which are positioned events.

The most simple way to visualize this is horizontally, using the Planning view.

In the Schedule View, to the right of the resources is the corresponding schedule.

The events are shown on the grille, by icons and/or horizontal, colored bars.

Columns are representative of time intervals.

The user can select the most appropriate time scale: one column per hour, or per day, week, etc.

5. Calendars

Certain dates will appear greyed out on the schedule, these are non-working periods, defined using configurable calendars.

Multiple calendars may be defined:

- daily calendars indicating non-working days (weekends and possible holidays);
- hourly calendars indicating time periods not worked (in 5 minute slices).

See Calendars

6. Events

Rectangles are used to represent the scheduled events.

Events are the central entities of VISUAL PLANNING: the majority of information available from the schedule is related to events.

Each event can be displayed on the schedule using a colored bar with a duration. The display may potentially include one or more icons.

The icons and colors are related to the event resources.
7. Event properties

Each event has a number of properties, visible on the schedule:

- the resource onto which it is positioned, dependent on the view,
- its start and end dates,
- the icon representing one or more of its related resources,
- the color representing one or more of its related resources.

Apart from these characteristics, an event may contain a number of additional properties, which can be defined as needed:

Notes

By double-clicking on an event in the schedule, it is possible to create a linked note, in free-text format (a type of “post-it”).

Forms

If necessary, you can also define forms and link them to events.

A form is a set of fields, predefined during configuration, the contents of which are completed for each event concerned.

See Form

Valorizations

If required, it is possible to define valorization lines (for example: cost, labor charges, etc.).

Each valorization line can be completed, within the event, in order to provide a cumulative total and provide quantitative analyses of the work: total labor charges, costs, receipts, etc.

The valorization lines are defined during the configuration phase and are pre-completed in terms of the creative rules, before being completed from within the events.

Quantitative analyses are detailed in the control functions: totals for control, load plans, events reports.

See Valuation item

8. Management functions

The following functions can assist the user during the scheduling process and provide analyses of the consequences.
They help with:

- choosing useful data (filters),
- analyzing and providing quantitative controls of the consequences of the schedule (total controls, load, events reports),
- creating warning or blocking operations at risk, or forbidden (constraints, links between events, workflows).

**Filters**

Selection filters and named filters can be used to restrict the display, on a schedule, to the data corresponding to criteria laid down by the user. They provide an aid in searching for available and suitable resources.

They can also be used to assure each user only sees the data that directly concerns him or herself, which gives a clearer view of their schedule.

See [Filter](#)

**Control totals**

The control totals can also be configured and show indicators for each resource.

See [Control total type heading](#)

**Workloads**

It is possible to calculate a load and capacity from the scheduling view. These calculations can vary over time, and in accordance with the defined resource.

See [load](#)

**Events reports**

Cross-referenced tables can be produced, displayed, printed or exported, based upon the scheduling data.

These highly flexible tables provide a global or detailed analysis of time spent or valorizations, depending on the criteria you choose.

See [Events Report](#)

**Constraints**

Configurable constraints may be applied to prevent the simultaneous use of certain resource or to limit use (maximum utilization quotas).
Constraints may be used to prevent unauthorized personnel using inappropriate resources. Constrains may be configured as blocking, or simply trigger warning messages.

See Constraint

Link between events

Sometimes, colored arrows link two events together. These links are created using the mouse, and are used to display and manipulate chained events.

These links, between events, can be used to move a cascade of interlinked events together, or, if necessary, to prevent certain movements which could impact on the coherence of the schedule as a whole.

See Link

Workflows

When a change of state is to be checked, for the respect of a particular process, it is possible to set up workflows to verify these changes in state.

This provides the ability to assure respect for a specific workflow, without necessarily having to configure a set of rights and permissions.

See Workflows
Chapter III. Configuration

1. DEFINITION

Each schedule must be configured prior to use.

The configuration for each schedule remains within an installation of VISUAL PLANNING. We can therefore implement a number of different configurations for a single installation.

The configuration include all functions defining the adaption of a schedule to the needs of the users. During the configuration, the primary entities, covered by the schedule, in particular those dimensions concerning Resources, are defined. These may be:

- persons,
- clients,
- equipment,
- tasks,
- projects,
- worksites,
- etc.

These entities, and the headings detailing their structure, are fundamental, permanent elements of the configuration of a schedule.

Other, less fundamental elements are defined during the design of the schedule, or added at a later date:

- Forms,
- Valuation items,
- Events hierarchies,
- Rules for creation,
- Calendars,
- Constraints,
- etc.

The filters, displays and favorites display are used to complete this configuration and to achieve the simplicity needed for day to day use of the tool.

These last functions are of primordial importance ads they provide a non-negligible time saving to the Schedule.

The configuration functions are grouped together under the General Parameters menu.
2. PRECAUTIONS

The operational facility of the VISUAL PLANNING software is immediately visible through the Scheduling Database (principally Events and Resources).

This data is defined in the configuration. This structures the architecture of VISUAL PLANNING, for example, as:

- CRM management,
- Worksite management,
- Project management,
- Management of interventions / Aftersales,
- Fleet management,
- Personnel management,
- Production management,
- etc.

During the initial setup of VISUAL PLANNING, the configuration stage is vital.

Entities relating to the configuration must be handled with care. Their importance must not be ignored.

**Functions impacted by configuration modifications**

All entities defining structural elements are impacted:

- Dimensions,
- Headings,
- Forms,
- Valuation items,
- Event creation rules,
- Event hierarchies,
- Time periods,
- Period types,
- Daily calendars,
- Hourly calendars,
- Hourly templates,
- Daily calendar models,
- Workflows.
Functions non impacted by configuration modifications

The life of a schedule does not require regular modifications to the configuration.

All data that can be handled by the VISUAL PLANNING tool is not covered by this warning:

- Events,
- Resources,
- Links.

These entities are maintained in a coherent state by the scheduler in the current cycle of the planning phase.

During the whole of the session a scheduler is connected it is always possible, via the cancel function, to take a step backwards. The stepping backwards only concerns the modification of data, and not the modifications to configurations.

3. SUPPORT SERVICES

The configuration is the most sensitive of the activities, with potentially the most serious implications as to the use of the Scheduling, and therefore the achievement of the objectives of product simplicity and profitability.

This configuration work requires an in-depth understanding of the characteristics of VISUAL PLANNING in order to draw the best results.

A consultancy service may be useful, or even indispensable, in definition the best possible configuration for your requirements.

To find out more about the services we can provide: Contact us on formation@stilog.com
Chapter IV. Multi-user management

1. MULTI-USER MANAGEMENT

VERSION ONE

In Version ONE, a single user is responsible for the schedule.

In this case VISUAL PLANNING is an excellent tool for schedule planning and organization.

This version includes all the functions needed to handle the scheduling of a service: previsions, oversight of activities and delays, reports and analyses are an integral part of the tool, all supported by manual imports and exports of a wide range of data.

In addition, one can create as many schedules as required in order to handle multiple, different activities.

ENTERPRISE VERSION

In its ENTERPRISE VERSION, VISUAL PLANNING allows distribution across a department or the whole enterprise.

It also makes it possible to inform the various departments and those involved of the state of progress of works underway.

In this configuration it is possible to control user rights in terms of the ability to access or modify, using an extremely fine mesh. This configuration also gives the option of using modules and floating licenses.

2. SHARING SCHEDULES IN REAL-TIME

In the ENTERPRISE VERSION, schedules may be consulted and updated by multiple users, simultaneously. Each user can see the modifications made by other users.

Although the database itself is constantly updated (all information created or modified is immediately written to the database), a periodic update is applied to user workstation (the period for each update can be adjusted by the user).

With scheduling updates of this type, each individual user can confidently consult or modify the schedule.

For correct, collective functionality in real time, each action under VISUAL PLANNING is immediately logged in the database. There is no manual back-up or save function.

Is a crash occurs, or a lone interruption or current disconnect, no operations already completed can be lost.
3. ACCESS RIGHT MANAGEMENT

In the ENTERPRISE version, the Admin. Centre can define, for each user or group of users, access rights to be configured for the various schedules, with, for each schedule, the various data functions included.

One can, for example, lock-out certain users from configuration functions and restrict their interventions to the resources and projects for which they are responsible.
Chapter V. Scheduling templates

1. DEFINITION

The scheduling templates are provided during the installation of VISUAL PLANNING. They can be used to create new schedules from an existing configuration.

2. USE

Creation of a new model

See Export as a template

Use of a template to create a schedule

See Creating a new schedule

3. LIST OF TEMPLATES PROVIDED

- Empty schedule,
- Personnel management,
- Worksite management,
- Equipment (fleet) management,
- Project management,
- Interventions/Aftersales management,
- Production management.
Chapter VI. Taking ownership

1. Run VISUAL PLANNING

VISUAL PLANNING ONE

To run VISUAL PLANNING, double click on the shortcut:

![Visual Planning One](image1)

VISUAL PLANNING ENTERPRISE

To start VISUAL PLANNING, open the Intranet/Internet browser.

Then type in the address, which has the following structure: http://nomduserveur/vplanning/

On the page which is then displayed, click on the button corresponding to the client or your VISUAL PLANNING schedule.

![Visual Planning Enterprise](image2)

Insert the correct screenshot

The login window opens:
To login, enter:

- Your **Username**,  
- And **Password**.

Then click on the **OK** button.

See [User Management](#).

### 2. Open an existing schedule

To open a schedule, click on **Planning > Open**.

A window will open, listing the existing schedules:
The window will only show the schedule the user has the right to open.

Select the schedule required and click on the **Validate** button.

You can type the first name of the schedule required for faster navigation to the schedule in question.

### 3. Open a recent schedule

It is possible to rapidly open one of the five most recently used schedules.

To do this, use the menu **Planning > click on the double arrow to the bottom of the icon Open > Select the schedule** required.
4. Create a new schedule

New schedules can be created using the Planning > New menu.

The following window opens, containing a list of the schedule templates:

Select the template to use as a basis for the schedule, then click on Validate.

The following window appears:
Now specify:

- The schedule's **Name**,  
- Its **Description**,  

Now validate by clicking on the **OK** button.

See [Scheduling templates](#)
Chapitre VII. General information covering the User Interface

The User Interface for VISUAL PLANNING allows the user to access all of the functions provided by the tool, based on user access rights.

The main window is displayed as follows:

See Main window

1. USING THE MOUSE

Drag and Drop

Shifting graphical objects around the schedule can be done by dragging them around with the mouse (press left hand button to pick up, release to drop)

Example: Create an event, move it, extend it.

See Shifting

Right click

The right hand button on the mouse is exclusively used to display context sensitive pop-up menus.
It can be used on:

- objects (an event or resource),
- an empty zone on the schedule,
- the header of a date column.

See Pop-up menu

Left click

The left hand button on the mouse is used for all other functions:

- Selecting an object,
- Validating an action,
- Running a functionality,
- Moving a graphical element.

Furthermore, VISUAL PLANNING documentation uses the term “click”, without further information, for the description of a “left click”.

See Selection

Double click

The double click is used to give rapid access to certain functionalities.

The majority of the time there is a contextual pop-up menu available for this function.

One exception to this rule: there is no alternative to a double click on the title bar of the Schedule view.

Keyboard-mouse combinations

- **Ctrl + left click**: select multiple objects of the same type (resources, events, items in a list, etc.),
- **Shift + left click**: select a range or a rectangular zone from a previously selected object (this selection is propagated horizontally, vertically or at an angle, if involving events),
- **Shift + drag an event**: duplicates an event and drop the copy as required on the schedule; the initial event remains in its original position,
- **Alt + drag one event onto another**: do not move the event, rather create a link between the original event and the event identified by releasing the mouse button,
- **Ctrl + Drag/Drop a resource onto an event, based upon the hierarchy of events**: either assign the resource to the event, or replace the resources assigned with a selected resource, or even create a subsidiary event,
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- Ctrl + C: Copy a selection,
- Ctrl + X: Cut a selection,
- Ctrl + V: Paste a selection,
- Ctrl + A: Select all events or resources on the display,
- Ctrl + E: Open the properties of the selected resources or events,
- Ctrl + R: Open the edit window to add a new resource,
- Shift + Del: Delete a selection without a warning message,
- Shift + Insert: Paste a selection into a drop-down list,
- Ctrl + Space on a text section: Used to display the list of existing values for the section,
- Two, slow, left clicks on a section of text, multi-line, Boolean, numerical, date/time, barcode, password: used to directly modify the value of a section,
- Alt + Right and Alt + Left or Alt + Scroll wheel on a Schedule view header: modifies the width of columns in the display, without modifying the time scale,
- Ctrl + Scroll wheel on a Schedule View header: modify the time scale of the display,
- F5: Refreshes the display,
- Left and right hand keyboard arrows: Scroll through the schedules and resources to the left or right,
- Ctrl + Drag and Drop a resource onto the schedule for another resource: copy and paste all events from the first resource onto the schedule for the second,
- Ctrl + S: Save current favorite display,
- Ctrl + Shift + S: Save a new favorite display.

2. MULTIPLE SELECTIONS AND OPERATIONS

Numerous functions of VISUAL PLANNING can be applied simultaneously to multiple objects: events, resources of the same size.

To achieve this, carry out a multiple selection using the mouse and the Shift and/or Ctrl keys, then right click on the selected objects and apply the required command.

This is also applicable, in the same manner, to each selected object individually.

3. COMMAND AND INFORMATION BARS

The interface is controlled using the following information and command elements:

Quick Access Bar
This bar, located in the top right of the display, gives access to, notably, the functions used for updates, cancellations and the display appearance.

See [Quick Access Bar](#)

### Menu Bar

Comprises sub-menus containing blocks. Used to provide access to a number of functions.

See [Menu Bar](#)

### Status bar

Located under the schedule, this bar indicates the list of filters applied to the display, the name of the current favorite display, the number of users currently connected to this schedule, the date and time given by the client workstation.