Notifications and Reporting
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Chapter I. Constraints

1. DEFINITION

A constraint is a warning function applicable to the creation or modification of one or more events. Constraints can be visualized in the form of an error message or indicator.

Those activated are applicable when events are created, moved or modified, to verify that there is no contradiction with other pre-existing events.

Constraints may have an imperative effect (preventing creation or modification), or may just simply trigger a warning message.

*There are three types of constraint:*

- Objective constraints,
- Coherency constraints,
- Time gap constraints.

It is possible to create as many constraints as possible.

Nevertheless, for application performance reasons, it is recommended that a limited number are activated.
Chapter II. Target constraint

1. DEFINITION

The **Target Constraint** is applicable when events are created, moved or modified, to verify that there is no contradiction with other pre-existing events.

The target constraint is used to verify that a quantity is not exceeded for a set of events over a pre-defined period of time. This verification can be carried out on all resources or even, one resource at a time.

The target constraint may be one of three forms:

- The creation or modification of an event is prohibited;
- Warnings, via a message, that the actions undertaken do not remain within the constraint;
- Authentication, via a message, that the user has re-entered their password.

The target constraint is applied using three filters:

- the **selected dimension** filter;
- the **events filter** for triggering the constraint;
- The events filter to verify the constraint.

2. CONFIGURATION

**Creation of a target constraint**

To create a new target constraint, go to **General settings** > **Right click on Constraints** > **Create a target constraint** > **Select the dimension**.

The following window is then enabled:
Specify the characteristics of the constraint, then confirm by clicking on the **Validate** button.

A target constraint has the following characteristics:

**Name**

Give the constraint a name.

**Description**

Give the constraint a description. This data is optional.

If the description is completed, the text in this field is the information displayed if the constraint has not been respected. (See [Constraint not respected](#))

**History**

This represents the creation date and time and the most recent change to the Constraint, together with the login of the user who made the change.

This property is updated automatically.

**Activated**

If this box is checked, the constraint can be activated. (See below [Activation / Deactivation](#))
Specifics

Type of constraint

There are three possible options:

- Warning: in this case, a message will appear to warn of a non-respect of the constraint,
- Prohibition: in this case, an error message will appear to stop the constraint being continually broken,
- Authentication: in this case, a message will appear to invite the user to re-enter his password.

Mark warning

This checkbox, if checked, surrounds the event with a dotted line if the constraint is not respected. Otherwise, the event will be surrounded by a continuous border.

Resource filter

This filter defines the resources to which Constraint applies.

You can:

- select an existing filter,
- or to create a custom filter specific to the constraint (see Customized). To do this, select the comment customized, then click on the button:

For all resources or individually for each resource

State whether the verification of the constraint should be carried out, for:

- all filtered resources, in one attempt;
- or, all resources, individually.

Events filter for triggering

This filter defines the events triggering the verification of the constraint.

You can:

- select an existing filter,
- or create a custom filter specific to the constraint.

Calculation

- Number of events,
- Duration in hours,
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- Duration in days,
- Load in hours,
- Load in days,
- Achievement,
- Valuations,
- Numerical form values.

Events filter for verification

This filter defines the events triggering the verification of the constraint.

You can:

- select an existing filter,
- or create a custom filter specific to the constraint.

Objective not to be exceeded

- fixed value: state a numerical value.
- heading value: state the name of a numerical heading, persistent control total, persistent operation or persistent events value (numerical values only).

Time Period

- At each moment: in this case it is only possible to calculate the number of events (See Calcul)
- Every: in this case you must select the frequency and give a start date for the period.

There are two possibilities for the definition of the reference date:

- The reference date is defined in the configuration of the constraint. In this case the verification is based upon this data and the pre-configured frequency period.

- The reference date is not defined in the configuration of the constraint. In this case, the reference date used for the verification of the constraint is the start date for the event being manipulated (creation/modification).
Modification of a target constraint

To modify a target constraint, simply re-visit the **General settings** and modify the constraint as required. (See [Creation](#))

Modifications made to a constraint will only affect future created or modified events.

Events that existed before this modification will not be changed.

Activation/deactivation

A constraint may exist without being active. It must be activated to function.

To see whether a constraint has been activated, go to **General settings**.

- An active constraint is preceded by the symbol 🙅
- An inactive constraint is preceded by the symbol 🙅

To activate an inactive constraint there are two possibilities:

- **Right-click on the constraint > Activate**,  
- Select the constraint then **click on the Activate box**.

To deactivate an active constraint there are two possibilities:

- **Right-click on the constraint > Deactivate**,  
- Select the constraint then **click (deselect) the Activate box**.

Deleting a target constraint

To delete a target constraint, **right click on the target constraint > remove**.

The deletion of a target constraint does not modify the planning data.

### 3. USE

If activated, and if the event created or modified is included by the triggering filter, the target constraint may or may not be respected.

Constraint respected

In this case no message will be displayed. The action for the creation, modification or movement of the event will continue normally.
Constraint not respected

In this case a message will be displayed. This message differs, depending on whether the situation merits a warning or a prohibition.

**Warning**

The following interrogation message appears:

![Question]

Answer the question: **Would you like to continue?**

- Either by clicking on the **Yes** button. In this case, the creation or modification will continue, despite the constraint. The event is however **marked**.
- Or, by clicking on the **Yes to all** button. In this case, the creation or modification will continue, despite the constraint. The event is however **marked**.
- Or, by clicking on the **No** button. In this case the action of creation, modification or movement is not completed.

**Prohibition**

The following error message appears:

![Error]

You must then click the OK button. The action of creation, modification or movement is not completed.

**Authentication**

The following message appears:
Enter the password and click on OK to validate the event. Click on **Cancel** to cancel the creation/modification of the event.

**Event marking**

If a warning type constraint is triggered and the user chooses to ignore it by clicking on **Yes** or **Yes to All**, the event is created or modified with specific markings.

The marking is only active if the **Mark Warning** box is checked.

This marking can be found later using various methods:

- The border of the duration bar,
- The event info-bubble,
- The description of the duration bar,
- The event filters.

**More detail:**

**The border of the duration bar**

In the border of the event. If the constraint has not been verified, the marking around the edge is dotted.

**The event tooltip**

Within the **tooltip**, it is possible to display the name of an unverified constraint:
The description in the duration bar

Within the duration bar description, it is possible to display the name of an unverified constraint:

Events filter

Events filters are used for unverified constraints, to identify events with markings of these types.
Chapter III. Coherency constraint

1. DEFINITION

The Coherency Constraint is applicable when events are created, moved or modified, to verify that there is no contradiction with other pre-existing events.

The Coherency Constraint is used to verify whether an event is coherent with other, pre-existing events.

The Coherency constraint may be in one of three forms:

- The creation or modification of an event is prohibited;
- Warnings, via a message, that the actions undertaken do not remain within the constraint;
- Authentication, via a message, that the user has re-entered their password.

The Coherency constraint is applied using three filters:

- the selected dimension filter;
- the events filter for triggering the constraint;
- The events filter to verify the constraint.

2. CONFIGURATION

Creating a Coherency Constraint

To create a new Coherency constraint, go to General settings > Right click on Constraints > Create a coherency constraint > Select the dimension.

The following window is then enabled:
Specify the characteristics of the constraint, then confirm by clicking on the **Validate** button.

A coherency constraint has the following characteristics:

**Name**

Give the constraint a name.

**Description**

Give the constraint a description. This data is optional.

If the description is completed, the text in this field is the information displayed if the constraint has not been respected. (See **Constraint not respected**)

**History**

This represents the creation date and time and the most recent change to the Constraint, together with the login of the user who made the change.

This property is updated automatically.

**Activated**

If this box is checked, the constraint can be activated. (See below **Activation / Deactivation**)

---

**Coherency constraint**

**General**

- **Name**: Coherency constraint Employee
- **Description**: 

**History**

- Created by admin: 3/7/2019 3:03 PM
- Modified by admin: 3/7/2019 3:03 PM

**Activated**: [ ]

**Specific**

- **Constraint**: Warning
- **Mark warning**: [ ]
- **Dimension**: Employee
- **of the filter**: [ ]

**Condition**

- **Triggered for the events of the filter**: [ ]
- **Verify that they belong to the filter**: [ ]

**OK**  **Restore**
Specifics

Type of constraint

There are three possible options:

- **Warning**: in this case, a message will appear to warn of a non-respect of the constraint,
- **Prohibition**: in this case, an error message will appear to stop the constraint being continually broken,
- **Authentication**: in this case, a message will appear to invite the user to re-enter his password.

Mark warning

This checkbox, if checked, surrounds the event with a dotted line if the constraint is not respected. Otherwise, the event will be surrounded by a continuous border.

Resource filter

This filter defines the resources to which Constraint applies.

You can:

- select an existing filter,
- or to create a custom filter specific to the constraint (see [Customized](#)). To do this, select the comment [customized](#), then click on the button: ✍️

Events filter for triggering

This filter defines the events triggering the verification of the constraint.

You can:

- select an existing filter,
- or create a custom filter specific to the constraint.

Events filter for verification

This filter defines the events triggering the verification of the constraint.

You can:

- select an existing filter,
- or create a custom filter specific to the constraint.

Modifying a coherency constraint

To modify a coherency constraint, simply re-visit the **General settings** and modify the constraint as required. (See [Creation](#))

Modifications made to a constraint will only affect future created or modified events.
Events that existed before this modification will not be changed.

**Activation/deactivation**

A constraint may exist without being active. It must be activated to function.

To see whether a constraint has been activated, go to **General settings**.

- An active constraint is preceded by the symbol 🎉
- An inactive constraint is preceded by the symbol 🧵

To activate an inactive constraint there are two possibilities:

- **Right-click on the constraint > Activate**,  
- Select the constraint then **click on the Activate box**.

To deactivate an active constraint there are two possibilities:

- **Right-click on the constraint > Deactivate**,  
- Select the constraint then **click (deselect) the Activate box**.

**Deleting a coherency constraint**

To delete a coherency constraint, **right click on the coherency constraint > remove**.

The deletion of a coherency constraint does not modify the planning data.

### 3. USE

If activated, and if the event created or modified is included by the triggering filter, the coherency constraint may or may not be respected.

**Constraint respected**

In this case no message will be displayed. The action for the creation, modification or movement of the event will continue normally.

**Constraint not respected**

In this case a message will be displayed. This message differs, depending on whether the situation merits a warning or a prohibition.

**Warning**

The following message appears:
Answer the question: **Would you like to continue?**

- Either by clicking on the *Yes* button. In this case, the creation or modification will continue, despite the constraint. The event is however **marked**,
- Or, by clicking on the *Yes to all* button. In this case, the creation or modification will continue, despite the constraint. The event is however **marked**,  
- Or, by clicking on the *No* button. In this case the action of creation, modification or movement is not completed.

**Prohibition**

The following message appears:

You must then click the OK button. The action of creation, modification or movement is not completed.

**Authentication**

The following message appears:
Enter the password and click on OK to validate the event. Click on Cancel to cancel the creation/modification of the event.

**Event marking**

If a warning type constraint is triggered and the user chooses to ignore it by clicking on Yes or Yes to All, the event is created or modified with specific markings.

The marking is only active if the Mark Warning box is checked.

This marking can be found later using various methods

- The border of the duration bar,
- The event info-bubble,
- The description of the duration bar,
- the event filters.

More detail:

**The border of the duration bar**

In the border of the event. If the constraint has not been verified, the marking around the edge is dotted.

**The event tooltip**

Within the tooltip, it is possible to display the name of an unverified constraint:

**The description in the duration bar**

Within the duration bar description, it is possible to display the name of an unverified constraint:

**Events filter**

Events filters are used for unverified constraints, to identify events with markings of these types.
Chapter IV. Time gap constraint

1. DEFINITION

The Time gap constraint is applicable when an event is created, moved or modified, to verify that there is no contradiction with other pre-existing events.

The time gap constraint is used to verify that a time gap is respected for a set of events over a pre-defined period of time. This verification can be carried out on all resources or even, one resource at a time.

The time gap constraint may be one of three forms:

- The creation or modification of an event is prohibited;
- Warnings, via a message, that the actions undertaken do not remain within the constraint;
- Authentication, via a message, that the user has re-entered their password.

The target constraint is applied using three filters:

- the selected dimension filter;
- the events filter for triggering the constraint;
- The events filter to verify the constraint.

2. CONFIGURATION

Creating a new time gap constraint

To create a new time gap constraint, go to General settings > Right click on Constraints > Create a time gap constraint > Select the dimension

The following window is then enabled:
Specify the characteristics of the constraint, then confirm by clicking on the **Validate** button.

A Time Gap Constraint has the following characteristics:

**Name**

Give the constraint a name.

**Description**

Give the constraint a description. This data is optional.

If the description is completed, the text in this field is the information displayed if the constraint has not been respected. (See **Constraint not respected**)

**History**

This represents the creation date and time and the most recent change to the Constraint, together with the login of the user who made the change.

This property is updated automatically.

**Activated**

If this box is checked, the constraint can be activated. (See below **Activation / Deactivation**)

Specifics

Type of constraint
There are three possible options:

- Warning: in this case, a message will appear to warn of a non-respect of the constraint;
- Prohibition: in this case, an error message will appear to stop the constraint being continually broken;
- Authentication: in this case, a message will appear to invite the user to re-enter his password.

Mark warning
This checkbox, if checked, surrounds the event with a dotted line if the constraint is not respected. Otherwise, the event will be surrounded by a continuous border.

Resource filter
This filter defines the resources to which Constraint applies.
You can:

- select an existing filter,
- or to create a custom filter specific to the constraint (see Customized). To do this, select the comment customized, then click on the button:

For all resources or individually for each resource

State whether the verification of the constraint should be carried out, for:

- for all filtered resources in a single operation,
- or, all resources, individually.

Events filter for triggering
This filter defines the events triggering the verification of the constraint.
You can:

- select an existing filter,
- or create a custom filter specific to the constraint.

Time gap

■ Day,
• Hour.

Events filter for verification
This filter defines the events triggering the verification of the constraint.
You can:
• select an existing filter,
• or create a custom filter specific to the constraint.

Minimum value to be respected
• fixed value: state a numerical value.
• heading value: state the name of a numerical heading, persistent control total, persistent operation or persistent events value (numerical values only).

Modifying a time gap constraint
To modify a time gap constraint, simply re-visit the General settings and modify the constraint as required. (See Creation)
Modifications made to a constraint will only affect future created or modified events.
Events that existed before this modification will not be changed.

Activation/deactivation
A constraint may exist without being active. It must be activated to function.
To see whether a constraint has been activated, go to General settings.

• An active constraint is preceded by the symbol 🦜
• An inactive constraint is preceded by the symbol 🦝

To activate an inactive constraint there are two possibilities:
• Right-click on the constraint > Activate,
• Select the constraint then click on the Activate box.
To deactivate an active constraint there are two possibilities:
• Right-click on the constraint > Deactivate,
• Select the constraint then click (deselect) the Activate box.
Deleting a time gap constraint

To delete a time gap constraint, right click on the time gap constraint > remove

The deletion of a time gap constrain does not modify the planning data.

3. USE

If activated, and if the event created or modified is included by the triggering filter, the time gap constraint may or may not be respected.

Constraint respected

In this case no message will be displayed. The action for the creation, modification or movement of the event will continue normally.

Constraint not respected

In this case a message will be displayed. This message differs, depending on whether the situation merits a warning or a prohibition.

Warning

The following interrogation message appears:

Answer the question: **Would you like to continue?**

- Either by clicking on the Yes button. In this case, the creation or modification will continue, despite the constraint. The event is however marked.
- Or, by clicking on the Yes to all button. In this case, the creation or modification will continue, despite the constraints being ignored. The event is however marked.
- Or, by clicking on the No button. In this case the action of creation or modification operation is not completed.

Prohibition

The following error message appears:
You must then click the OK button. The action of creation or modification is not completed.

**Authentication**

The following message appears:

Enter the password and click on OK to validate the event. Click on **Cancel** to cancel the creation/ modification of the event.

**Event marking**

If a warning type constraint is triggered and the user chooses to ignore it by clicking on **Yes** or **Yes to All**, the event is created or modified with specific markings.

The marking is only active if the **Mark Warning** box is checked.

This marking can be found later using various methods:

- The border of the duration bar,
- The event info-bubble,
- The description of the duration bar,
- The event filters.

More detail:

**The border of the duration bar**

In the border of the event. If the constraint has not been verified, the marking around the edge is dotted.
The event tooltip

Within the **tooltip**, it is possible to display the name of an unverified constraint:

The description in the duration bar

Within the **duration bar** description, it is possible to display the name of an unverified constraint:

Events filter

Events filters are used for unverified constraints, to identify events with markings of these types.
Chapter V. Workload

1. DEFINITION

A workload is used to totalize, period by period, for a selected set of resources and criteria, certain numerical values for events, attached to these resources.

Within a workload, a comparison can be made of:

■ the load represented by the quantity of work to undertake. It may be:
  ▪ a number of scheduled events,
  ▪ their duration,
  ▪ their load,
  ▪ their valuation,
  ▪ or numerical values taken from their forms.

■ the objective representing the availability or capacity of resources used for this work. It may be:
  ▪ a number of scheduled events,
  ▪ their duration,
  ▪ their load,
  ▪ their valuation,
  ▪ or numerical values taken from their formulas,
  ▪ and finally, the duration of the free periods relating to resources.

The ratio between load and capacity for a workload may be attached to specific colors depending on the values for a particular period.

This latter notion may be considered to resemble the notion of a threshold for control totals.

2. CONFIGURATION

Creation of a workload

To create a workload, go to General settings > Right click on workload > Create an workload for > Select the dimension.

The following window is then enabled:
Specify the characteristics of the workload, then confirm by clicking on the Validate button.

The characteristics of a workload are as follows:

**Name**

Give the workload a name.

**Description**

Give the workload a description. This data is optional.

This description appears in a tooltip when one uses mouse over on the workload title bar.

**History**

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

This property is updated automatically.
Calculation type

The type of calculation used, for all filtered resources, for all events covered by a filter, is chosen from the following:

**Number of events**

The calculation is based upon the Value 1 for each event.

**Duration of events (h)**

This is a conversion, in hours, of the durations of all events the calculation is based upon.

In this case, the user must define the type of period for the calculation.

**Duration of events (d)**

This is a conversion, in days, of the durations of all events the calculation is based upon.

In this case, the user must define the type of period for the calculation.

**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.

**Free period duration (h)**

A conversion, in hours, of the duration of the free periods.

The user must define the type of period for the calculation.

If the type of period chosen has the value *All*, the calculation is only carried out using the periods actually worked.

**Free period duration (d)**

A conversion, in days, of the duration of the free periods.

The user must define the type of period for the calculation.

If the type of period chosen has the value *All*, the calculation is only carried out using the periods actually worked.
load in hours
The total of the load, in hours, for events included in the resource called by the events filter.

load in days
The total of the load, in days, for events included in the resource called by the events filter.

Free load (h)
The calendar duration, in hours, minus the load of the events concerned.

Free load (d)
The calendar duration, in days, minus the load of the events concerned.

Valuations
The total valuation of all selected valuation items. By choosing this type of calculation, the following information must be defined:
- the valuation items to be taken into account,
- the unit of calculation.

Form values
These are the sums of the values of the numerical headings of the selected forms.

To get these figures, select form headings by clicking on the button 🖊.
A window opens. Select the form headings to be totaled by ticking the appropriate lines then click on validate.

Cumulative values
If this box is checked, the workload will provide cumulative values.

Accumulation start date
Set the start date for cumulative values.

Display format
- Integers: Select the value 0.
- Decimals: Select the value 0.00.
- Integer percentage: Select the value 0%.
Decimal percentage: Select the value 0.00%.

Setting thresholds
The thresholds are used to give a color to each level, in order to reach a given load.

Right-clicking brings up the following window:

You must then specify:

■ a percentage for each specified threshold,
■ a color, when the threshold value is reached,
■ another color when the threshold value is exceeded.

One line per resource in a dimension
If this box is checked, it is possible to display the load with a single line of results per resource.
Events filter
This involves an events filter, linked to the workload.
Therefore you must select an existing filter or create a customized events filter.
Only events captured by the filter will be taken into account by the workload calculation.

Resource filter
This involves a resource filter, linked to the workload.
Therefore you must select a resource filter with the dimension associated with the workload.
This is used to create a personalized filter.
Only resources captured by the filter will be taken into account by the workload calculation.

Objective - Definition
It is possible to define a load objective target by clicking on the right hand button.

Automatic calculation: box checked
The calculation for the workload is automatic.

Value
The calculation may be based on:
- number of events,
- duration of events (in Hours),
- duration of events (in Days),
- occupational duration (in Hours),
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- occupational duration (in Days),
- duration of free periods (in Hours),
- duration of free periods (in Days),
- load (in Hours),
- load (in Days),
- free load (in Hours),
- free load, (in Days),
- valuations,
- formula values.

**Events filter**

This involves an events filter, linked to the workload. Therefore you must select an existing filter or create a personalized events filter. Only events captured by the filter will be taken into account by the workload calculation.

**Resource filter**

This involves a resource filter, linked to the workload. Therefore you must select a resource filter with the dimension associated with the workload. This is used to create a personalized filter. Only resources captured by the filter will be taken into account by the workload calculation.

**Automatic calculation: box not checked**

The load calculation is completed using a fixed objective.

![Automatic calculation](image)
Fixed objective

Used to enter the fixed load objective.

Modification of a workload

To modify a coherence limit, simply re-visit the General settings and modify the workload as required. (See Creation)

In the window that appears click on the characteristics to modify.

- Press Validate to accept the changes,
- or Reset to ignore the modifications and go back to the initial configuration.

Deleting a workload

To delete a workload, right-click on the workload > Delete.

In the window that is displayed, click on:

- Yes to confirm the deletion,
- or No to prevent the deletion.

3. USE

The load plans are only visible in Schedule View.

Display settings

To display the workload, click on the button for display settings, then on the workload tab.
The following characteristics can be given:

**Display total**  
This box is used to display an additional load that computes the total of visible workloads.

**Display workloads**  
This checkbox is used to display the load plans.

**Load plans**  
Select the workload(s) to display in the view.

**Right-clicking** brings up the following window:

To add a workload, **select the workload** in the left-hand part, then drag it to the right-hand part using the arrows.
You can also sort appearance of the workload using the sorting arrows.

Display/hide load plans

Within the planning view it is possible to display or hide load plans rapidly using the menu Display > Planning block - show/hide load plans.

Choosing a display

There are several different ways of displaying a workload. These are:

- Value,
- Target,
- Target - Value,
- Value - Target,
- Percentage,
- Histogram.

There are two entries for display types:

- Right click on the workload > Display > Select required display

- From the menu Display > Display block > Choose required display
Exporting workloads

It is possible to export the results of the workloads.

To do this, **right-click on the workload > Export workloads**.

- **CSV file**,
- **Excel file**.

**Type: CSV**

If the export file is a CSV file, the attributes to be defined are:

**Separator**

- semicolon,
Full stop, Space, Comma, Tab, Vertical Bar.

**Encoding**
- Default (System encoding),
- UTF8,
- Windows-1252 (Windows).

**Type: Excel**
If the export file is an EXCEL file, the attribute to be defined is the **Worksheet**.

**Path**
Define the path to the destination file.

**Period**
Define the data export file.

**Data tooltip for workloads**
- By passing the mouse over the heading of the workload, a tooltip will appear, corresponding to the description:

  ![Employee Workload](image1)

- By passing the mouse over a cell in the workload, a tooltip will appear:

  ![Employee Workload](image2)

**VPPORTAL display**
It is possible to display the load plans in a Planning context within **VPPORTAL**.
Chapter VI. Events Report

1. DEFINITION

An events report is the primary table used for the analysis of data within the planner. Its highly complex configuration provides the opportunity to use all the information contained within the planner, based upon the criteria chosen for a given instant.

As with the filters, several different events reports can be saved and recalled.

The result will be shown in a dedicated display view.

One can easily export an events report using an Excel format or a CSV file.

2. CONFIGURATION

Creating an events report

To create a new events report, go to General settings > Right click on Events Report > Create an events report for > Select the dimension

The following window is then enabled:
Notifications and Reporting

You must define the following characteristics, then click on the **Validate** button to save the events report. These characteristics are:

**Name**

The **Name** text field is obligatory. It is used to give a name to the events report being created.

**Description**

The **Description** text field is optional. It is used to provide a description to an events report.

**Private**

This box determines whether the events report is [private] or otherwise.
History
This represents the creation date and time and the most recent change to the events report, together with the login of the user who implemented the actions.
This characteristic cannot be edited.

Hide empty columns
If this box is checked, columns without events are not displayed.

Hide empty rows
If this box is checked, rows without events are not displayed.

Grouping
The Grouping dropdown list lets the user group data for analysis using a criterion, which may be:

- **None**: this means no grouping is required;
- **Per period**: therefore the user must choose the grouping period from a list (the same one as for time scale);

- **Per dimension**: the user must choose the grouping and the headings of this grouping, with the resources used by it.

Cumulative values
This box, if checked, is used to produce cumulative totals of values given by calculation in data to be calculated.
This function works if a grouping exists.

**Display all values**

This box, if checked, is used to repeat the display of the value for a heading, if this value is identical for several successive lines of events reports.

If this box is not checked only differing values are displayed.

**Display as**

The list of choice of **Display as** is used to display the results calculated:

- Either as a value,
- Or, as a percentage of the total,
- Or, as a percentage of the column,
- Or, as a percentage of the line.

**One event per line**

This box, if checked, is used to repeat the line as many times as there are events.

**Number of subtotals**

The numeric field **Number of subtotals** is used to choose the number of subtotals displayed, as per the analysis and grouping criteria.

Example: the value 1 signifies that only the global total for the data calculated is to be displayed.

**Data for analysis**

The values of the **Data for Analysis** are a list of entities events and headings used for analysis. You must choose at least one.
Data to calculate

The **data to calculate** values are used to choose from the list of existing digital data, which are calculated by the events report.

Right-clicking brings up the following window:
Click on the **Add** button to add a new calculation, **Duplicate** to copy an existing calculation and **Delete** to remove a calculation.

Finally, for each data to calculate, you must define:

**Name**

Give the data to calculate a name.

**Description**

Give the data a description.

**Display**

Check to ensure that the data to calculate is shown in the final result.

**Calculation type**

This type can be:

- Number of events,
- Duration of events (h),
- Duration of events (d),
- Achieved duration (h),
- Achieved duration (d),
- Free period duration (h): only with functionality of [events per line](#),
- Free period duration (d): only with functionality of [events per line](#),
Notifications and Reporting

- Load in hours,
- Load in days,
- Free load (h),
- Free load (d),
- Valuations,
- Form values: choose the numerical values of the form headings using the field entitled Form headings,
- Resources values: choose the numerical values or persistent calculated headings for the resources using the field entitled Resource headings,
- Formula: used to carry out calculations involving the data to be calculated for the events report (right click inside the setup window for the formula to select the data to be calculated) in the Formula field.

It is not possible to use “formula” type data to be calculated within another piece of formula type data to be calculated.

Display format

Select the format for displaying numerical values.

The comma is set by using a full stop in VISUAL PLANNING. The thousand separator is set using a comma “,”:

<table>
<thead>
<tr>
<th>Format</th>
<th>Example</th>
</tr>
</thead>
<tbody>
<tr>
<td>0,000</td>
<td>12 000</td>
</tr>
</tbody>
</table>

Setting thresholds

Set the thresholds using a constant or one of the “data to be calculated”.

The thresholds are only displayed if the grouping has been activities.

Period

Choose a pre-defined period, a personalized or standard period (in this case the users can directly modify the period in the report by right clicking on the events report view).

Example: This Month means From the start of the first day of the current month to the end of last day of the current month.
Notifications and Reporting

Events filter

Chose an existing events filter, a personalized or standard filter (in this case the users can directly modify the filter in the report, by right clicking on the events report view).

Resource filter

The list of 'Dimension' filters is used to apply a resource filter to the dimension selected for the Events Report.

It is also possible to select a standard filter (See Use of standard filters) or a customized resource filter.

Export

These parameters must be completed if the export of the events report using a URL call is authorized.

URL "call"

Check this box to activate this parameter.

Activating authentication

Check this box if authentication is required to start the export of the events report.

User ID

Define the ID to be used by the user to call the export URL.

Password

Define the password to be used by the user to call the export URL.

Editing an events report

To edit an existing events report, go to the General settings panel,

Then left click on the events report to be modified

The corresponding section is activated to accept modifications to the events report.

See Creating an events report

Deleting an events report

To delete an existing events report, right click on the events report to be removed > Delete

The following warning message appears:
Then click on **Yes** to confirm the deletion, or **No** to cancel it.

### 3. USE

**Displaying an events report**

**Events Report View**

An events report must be displayed in a dedicated view. It is not possible to see an events report without having created a display view.

See [Events Report View](#)

**Display Type**

An events report may be displayed in the form of:

- a table;
- a histogram;
- a stacked histogram;
- sectors;
- curves;
- areas;
- stacked areas.

**Use of standardized filters**

**Standard filter for resource lines**

When configuring the section **Resource Filter**, for an events report, it is possible to save the current filter. This option allows the use of [resource filters](#) when the events report is shown. In the same way, this also allows the use of [automatic filters](#) for the dimension in question.

To trigger a resource filter, right click on the header of the events report and select the resource filter required.
Standard events filter

When configuring the section **Resource Filter**, for an events report, it is possible to save the current filter. This option allows the use of **events filters** when the events report is shown.

To trigger an events filter, right click on the header of the events report and select the events filter required. The latter is also available via the filter tab on the menu bar.

Favorite display

It is possible to save a favorite display, with includes a specific view of an events report.

To do this, first create an events report view, before saving it to **favorite displays**.

Exporting an events report

The most commonly used method for using the data in events report in an external tool, is to export the events report to an Excel or CSV file.

This export may also be launched via a URL called from outside VISUAL PLANNING. (See **Export**)

See **Export events report**

Copy and Paste to a text editor

In an events report view, it is possible to copy and paste the contents to a text editor or presentation.

To do this, **click on the events report view > Ctrl + C then click on the text editor and Ctrl + V**.

This works with various text editors and all display modes (table, histogram, etc.)

VPPORTAL display

It is possible to display events reports in a Planning context within **VPPORTAL**.
Chapter VII. Thresholds

1. DEFINITION

Thresholds are used to link limit objectives (both high and low) to headings of the type Control Total and Operation.

The defining of a threshold is optional.

2. CONFIGURATION

Setting thresholds

The properties window for headings of the type Control Total and Operation is used to define one or more threshold values.

By clicking with the right hand button:
Notifications and Reporting

The following threshold definition window opens:

The add button is used to create different heading thresholds.
For each threshold the following information can be defined:
Notifications and Reporting

- A value:
  - constant: in this case the value of this constant must be defined,
  - or for a heading whose type is numeric, a control total (persistent) or operations (persistent). This heading may have the same dimension or have a dependent dimension.
- A coefficient, applied to this value,
- A color, when the target value is reached,
- Another color when the target value is exceeded,
- The Target box is checked for a given threshold. This target is used to display a percentage or to calculate the remainder.
- A restriction method:
  - None: no restriction
  - Warning: a warning message will be shown when the threshold is exceeded.
  - Prohibition: an error message will be shown when the threshold is exceeded.

Display remainder

The box Display remainder implies that the heading shows the difference between the objective set by the thresholds and the calculated current value.

If no threshold has been defined, this remainder is not used.

Display as percentage

The Display as percentage box implies that the heading shows the result of the division of the calculated value into the objective as defined by thresholds, multiplied by 100.

If no threshold has been defined, this percentage is not used.

3. USE

Visualization

Thresholds are used to add color to the various display views.

Thus, in the planning and resource views, the headings with thresholds are colored with the threshold color.

In these views, it is no longer possible to fully color the resource using this color.

To do so, click on this button for display settings, then define the background color for the resources.
Use by other functionalities

Thresholds can be used in two types of heading:

■ Control total type heading,
■ Operation type heading.

The load plans also use thresholds, but in a simplified manner.