Resource and Event
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Chapter I. Resource

1. DEFINITION

A resource is the basic element used by VISUAL PLANNING in the construction of the schedule. Resources are data, contained by dimensions.

From a professional point of view, resources may be:

- human resources (administrators, employees, sub-contractors),
- information resources (information and IT, etc.),
- hardware resources (equipment, tools, buildings, rooms, etc.),
- financial resources (budgets, etc.).

With VISUAL PLANNING, resources can also be:

- tasks/assignments, projects, phases,
- absences,
- states.

Any entity which can be scheduled is potentially a dimension and therefore a resource.

Resources can be displayed in a number of views.

2. CONFIGURATION

The existence of a resource assumes that its dimension already exists.

The configuration of a resource is that of its associated dimension, notably in terms of its headings.

3. USE

A resource belongs to a single dimension.

Creating a resource

There are several methods of creating a resource:

- Creating a new resource: Right-click on a resource > Add. In this case, certain parameters are pre-completed: those of the dimension associated with the new resource.
■ Duplicate a resource: **Right-click on a resource > Duplicate.** This second method provides the characteristics of the new resource, pre-completed using those of the resource duplicated.

■ Creating a new resource by assignment: See **Assignment.**

### Heading tab

The first tab allows the user to enter the resource headings:

![Employee heading tab screenshot]

### Parameters tab

The second tab is used to (re)define the other event parameters:
Amongst these characteristics (by default: those of the dimension) one can find:

**Hourly calendar**
Define the **hourly calendar** for the future resource.

**Daily calendar**
Define the **daily calendar** for the future resource.

**Color**
The color of the resource is used to identify the resource itself and/or its events, in the various display views.

**Icon**
The **icon** for this resource can also be seen in the various display views.

**Creation rules**
Define the **Creation rules** of future events for this resource.
It is possible to choose not to associate any creation rules with the resource.
In this case, the creation of events is not possible from this resource using the drag and drop method.

**Complete modification of a resource**

To modify a resource, **right click on a resource > Modify** or **Click on a resource + Ctrl E**.

The window showing the resource properties then opens:

![Resource properties window](image)

Modify the characteristics, then click on the **Validate** button (See [Creating a resource](Creating+a+resource)).

It is also possible to carry out a **complete modification of multiple resources at the same time**.

To achieve this, select several resources simultaneously: click on each resource to be selected whilst holding down the CTRL key.

Then **right click on one of the resources selected > Modify**.

The following window appears: with **a header in brackets, giving the number of resources selected** (in this example 3):
The greyed out headings are those with a **different value**, depending on the resource.

Those headings **not greyed out** are those with a **common value for all resources in the selection**.

It is possible to modify these two types of heading.

The modification of a heading will have an impact on the value of this heading within all other resources selected.

**Modifying the value of a resource**

To modify the value of a single heading of a resource, **right click on the resource > Modify the value**. The resource editing window will then open.

Modify the characteristic then press **Validate**.

The modifications to a value in a heading of the resource are based upon the type of heading modified.

In the same manner as for the complete modification of a resource, it is possible to select multiple resources at the same time (CTRL + Left click) and modify the value of a single heading by **clicking on the header of the heading > Enter a common value**.

The number of resources selected will appear in brackets in the header of the popup.
Modifying the calendar for a resource

Using Drag and Drop

In the Schedule View it is possible to modify the calendar for a resource, by dragging and dropping a type of period onto the resource schedule.

To carry out this type of modification, you must have access to the Global Settings panel.

Via the resource properties window

To achieve this, simply right click on the resource > Modify > Settings Tab.

Then:
choose another category from the list,

or modify the associated calendar using the button:

This action will modify the calendar (and potentially the events) for all resources attached to this calendar.

or you can even create a customized calendar using the button: . This calendar is unique to the resource.

Using the context sensitive menu

Hourly calendar

Right click on the resource > Assign calendar > Hourly.

The following window opens:

![Changing hourly calendar window]

It is then possible to select and apply an hourly calendar:

- to the whole schedule, by ticking the box Replace the current calendar (equivalent action of the button above)
This action will modify the hourly calendar (and potentially the events) for all resources attached to this calendar.

- Or, to a restricted period, by selecting the start and end of the period (equivalent action of the button above).

**Daily calendar**

**Right click on the resource > Assign calendar > Daily.**

The following window opens:

![Changing daily calendar](image)

It is then possible to select and apply an daily calendar:

- to the whole schedule, by ticking the box **Replace the current calendar** (equivalent action of the button above)

This action will modify the hourly calendar (and potentially the events) for all resources attached to this calendar.

- Or, to a restricted period, by selecting the start and end of the period (equivalent action of the button above).
Duplication of resources

Duplicate using the menu
To do so, Right-click on the resource to duplicate > Duplicate.
The following message appears:

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:

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.

Importing a resource
It is possible to import one or several resources.
See Importing a resource

Exporting a resource

It is possible to export one or several resources.

See Exporting a resource

Deletion of a resource

The deletion of a resource leads to the deletion of all events using this resource.

To delete a resource, either:

- Right click on the resource > Delete,
- Select the resource + press the DEL button on the keyboard.

The following message appears:

![Warning message]

You can then click on:

- Yes, to confirm the deletion of the resource,
- No, to not delete the resource.

To delete a selection of resources, either:

- Right click on the selected resources > Delete
- Select the resources + press the DEL button on the keyboard.
You can then click on:

■ **Yes**, to confirm the deletion of the resource,
■ **Yes to all**, to confirm the deletion of the whole selection,
■ **No**, to not delete the resource,
■ **Cancel**, to cancel the deletion of the whole selection.

Through the action of deletion, the single resource or selection no longer exists anywhere in the schedule.

This deletion operation can be cancelled by the **Cancel** button or the keyboard shortcut **Ctrl + Z**.

### Displaying events relating to a resource

This operation is carried out by **right clicking on a resource > modify**

The window which opens contains an additional tab “**Events**” which shows the events linked to a resource, in the form of an **Events View**, which can be defined in accordance with:

■ an **Events filter**
■ a **Time period**
It is therefore possible to interact with the events normally, via a right click. (See Pop-up menu)

The display settings for this tab can be accessed by the button and can be saved to a favorite display.

Assignment to another resource

It is possible to assign a resource from one dimension to another resource in another dimension. This functionality is made possible by the Resource Type Headings. This principle is used to link a “principal” resource to a “dependent” resource. It opens up access to the multi-dimensional principles of VISUAL PLANNING. In addition, during the creation of an event via the “principal” resource, the “dependent” resource can automatically be assigned to the event. This is possible only if the box entitled “Associate with events” has been checked during the configuration phase, in the Resource Type Heading.

Sorting resources

It is possible to sort resources within the Planning and Resources Views.
Selecting resources

Selecting 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.

Searching for resources
All users of VISUAL PLANNING may, in addition, carry out searches for one or more resources in the planning view and resources view.

See Search

Resource filter
It is possible to create named resource filters or to apply selection filters.
Resource forum

You can add a discussion forum to each resource for a dimension.

See Forum
Chapter II. Event

1. DEFINITION

An event is a colored rectangle, positioned on the schedule.

The schedule is a fine mesh, to represent a moment in time or a time element.

It must include:

- one or more resources,
- a start date/time,
- an end date/time,
- a duration,
- a load,
- a progress status,
- a log history.

It may potentially contain:

- a form,
- one or more valuation items.

Events may have individual hierarchical priorities.

In the Schedule, Gantt Events and Diary views, the visual representation of an event is called the Duration bar.

An event may be worked or not.

2. PROPERTIES OF AN EVENT

The properties for an event can be accessed simply by:

- Right click on an event > Modify
- Or Left click on an event > Ctrl+E.
The window showing the event properties then opens:

- **A type of event** may be:
  - Daily,
  - Half-daily,
  - Hourly.
- A **start date** (in the format dd/mm/yyyy),
- An **end date** (same format as the start date/time),
- A **duration**, the difference between the start and end dates for the event. (See Duration)
- The “**Works**” checkbox is used to define whether the event is actually **work or not**.

The maximum duration of an event is 20000 days.

**COMPLETION BLOCK**

A progress bar determines the percentage of **completion**. It runs from 0% to 100%.

The “**Automatic**” checkbox is used to automate the **completion** of an event.

Depending on whether completion is using automatic or manual mode, the event status may be:

<table>
<thead>
<tr>
<th>Mode</th>
<th>Event status</th>
<th>Completion percentage</th>
<th>Event start date</th>
</tr>
</thead>
<tbody>
<tr>
<td>Automatic</td>
<td>Planned</td>
<td>Equal to 0%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Ongoing</td>
<td>Between 0% (excluded) and 100%</td>
<td></td>
</tr>
<tr>
<td></td>
<td>Completed</td>
<td>Equal to 100%</td>
<td></td>
</tr>
<tr>
<td>Manual</td>
<td>Planned</td>
<td>Equal to 0 %</td>
<td>Greater than the current date value (in the future)</td>
</tr>
<tr>
<td></td>
<td>Ongoing</td>
<td>Equal to 0 %</td>
<td>Greater than the current date value (in the future)</td>
</tr>
<tr>
<td></td>
<td>Urgent</td>
<td>Between 0% (inclusive) and 100%</td>
<td>Lower than the current date value (in the past)</td>
</tr>
<tr>
<td></td>
<td>Completed</td>
<td>Equal to 100%</td>
<td></td>
</tr>
</tbody>
</table>

**RESOURCES BLOCK**

[Client: Capital, Employee: Jim, Location: NY USA, Order: Service: Product Support/Implementation, Status: Accepted]
The list of **resources** is visible and modifiable. The visible **resources**, belong to the existing dimension in the [hierarchy of events](#), as per the configuration for the event.

Each resource is represented by:
- an icon,
- a color,
- a text, corresponding to the identification headings, divided by a separator.

**LOAD BLOCK**

```
 Load

 Type: In hours  Value: 0 h 0 mn
 In hours: 0  In days: 0
```

Each event is associated with a **load**.

This **load** requires the choice of a **type of load**, which may be:
- Automatic,
- In days per day,
- In hours per day,
- In hours per hour,
- In days per hour,
- In days,
- In hours,
- As a percentage.

There are three values for each event:
- **Value**: The value, using the types defined above,
- **In hours**: The conversion of the load, into hours,
- **In days**: The conversion of the load, into days.

**FORM BLOCK**
This list lets you choose a form to be associated with an event.

If a form is selected, a tab, bearing its name, will appear in the event properties window.

This tab will allow the user to see and modify the values of the headings of a form associated with the event.

This tab will not appear if the event does not contain a form.

**VALUATION BLOCK**

This tab will allow the user to see and modify the values of the valuation items associated with the event.

It is possible to **add** a new line, to **delete** one or to modify an existing line.

It is useful to refer to **valuation items** for a better understanding of the following information.

For each valuation item, the following characteristics are shown:

**Name**

The name of the valuation item is shown in the left hand column.

**Unit of Time**

The unit of time determines the method for calculating valuations.

This unit can be:

- the day,
- the hour,
- the load, in days,
- the load, in hours,
- or, calculated for the type of event.
Fixed value
The fixed value for a valuation item is a value associated directly with the existence of a given event.

Value per unit
The variable value per unit is a value which allows the total to vary proportionally in relation to the load or duration of the event (See Unit of time above)

Coefficient
The coefficient is that of the valuation item.

Total (base)
This value is calculated from the values defined above.

Total (global)
This total is the global value for the valuation item. It is the result of a multiplication of the total (base) by the global conversion coefficient.

Total valuation
This final total is the total of all valuation items assigned to the event.

NOTE BLOCK
A note for an event allows the user to add comments in the form of multi-line text fields.

LOGGING BLOCK
These properties cannot be modified.

The log of the event, recorded:
- Event creation date,
The ID (login details) of the user creating the event,
- The date of the last modification to the event,
- The ID (login details) of the user carrying out this modification.

It is also possible to display a more detailed log if this option has been activated in the configuration of one of the dimensions making up the event. To see the detailed log, simply click on the default event log.

In addition to the properties listed above, the detailed log will show any modifications applied.

3. CONFIGURATION

The configuration of an event is established by the configuration of the other elements making up the schedule.

This covers dimensions, timetables, creation rules, events hierarchies and potentially forms and valuation items.

4. USE

Creating an event

CREATION METHODS

There are several methods for creating an event in VISUAL PLANNING:
Drag and Drop,
Double click on the schedule,
Copy and Paste an existing event,
Copy and Paste one resource onto another,
Vertical repeat,
Horizontal repeat,
Automatically, on creation of a resource.

Drag and Drop

Resource onto schedule or agenda
The drag and drop is used to create an event by sliding one resource on the schedule or agenda onto another resource.

Resource to resource
It is possible to copy and paste events from one resource to another, using the drag and drop method. This functionality allows all events from a Resource 1 to be copied and pasted to a Resource 2.

To do this, drag Resource 1 onto the line of Resource 2, which must have the same dimension and a given scheduling date.

The following window opens:

Three possible options:

- **Yes, from first**: All events from Resource 1 will be pasted into the schedule for Resource 2, the first event will start at the date chosen during the drag and drop.
- **Yes, from last**: All events from Resource 1 will be pasted into the schedule for Resource 2, the last event will end at the date chosen during the drag and drop.
- **No**: No event will be copied.

Double click on the schedule

Double click on the schedule for the chosen resource. The event edit window will open, allowing a new event to be created.
Add a new event

Right click on the schedule for the chosen resource > a context-sensitive menu will be shown > select “Add a new event”.

There are two possibilities:

- The resource is associated with a single hierarchy,
- The resource is associated with multiple hierarchies. You must select a hierarchy.

Duplicate an event

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.

Repeat an event

There are three types of repetition within VISUAL PLANNING:

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

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:
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.

**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:

![Vertical repeat window](image)

**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.

**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:

![Repeat on selection window](image)

**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 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.

Automatically, on creation of a resource

When the automatically create an event box is checked, when addition a new resource an even will automatically be placed, by default, at today’s date.

CREATION PROCESS

Before authorizing the creation of an event, VISUAL PLANNING carries out a number of checks. It checks:

- The resources associated with the event,
- The creation rules,
Resource and Event

- The events hierarchies,
- The permissions,
- The constraints.
- **Inclusion of event resources.** VISUAL PLANNING checks the resources associated with the event:
  - Those used in the drag and drop operation,
  - and resources connected to these via Resource type headings.

**Creation rules**

Then, the creation rules apply as a function of all resources associated.

These creation rules are in addition to, or potentially replace the resources, and give the event different characteristics.

If there is no creation rule of a resource, it is impossible to create an event from this resource by the drag and drop method.

**Event hierarchy**

VISUAL PLANNING checks that there is at least one event hierarchy authorizing the creation of an event from the resources selected. VISUAL PLANNING checks not only the resources used for the drag and drop, but also any related resources, linked by Resource-type headings.

There are three possible options:

- No hierarchy authorizes this association of resources: no event is created,
- One hierarchy authorizes this association of resources: the event is created,
- One hierarchy authorizes the creation of the event using the resources selected but also requires the addition of one or more additional resources: VISUAL PLANNING then requests that you select any additional resources to be added. Once the necessary resources have been assigned to the event, the event is created. The obligatory order of appearance of the dimensions corresponds to the order of the dimensions selected in the hierarchy window.
Permissions

VISUAL PLANNING checks, from the Permissions, that the user is authorized to create this type of event.

There are two possibilities:

- The user is authorized to create the event: an event is created;
- The user is not authorized to create the event: a message is displayed and the event is not created.

Constraints

Finally, VISUAL PLANNING checks whether a constraint must be respected for the event to be created.

There are 4 types of constraint:

- coherence-related constraints,
- objective-related constraints,
- time differential-related constraints,
- threshold-related constraints linked to control total or operational type headings.

There are three possible scenarios:

- There are no constraints applicable to the event: the event is created.
- The event contradicts a constraint and VISUAL PLANNING indicates this information to the user, the following message appears automatically:

  ![Question Window]

  A constraint of this type is known as a “warning constraint” and leaves the choice to the user of whether or not to create an event, despite the constraint not being respected.

- The event contradicts a constraint and VISUAL PLANNING prevents the creation of an event: no event is created.

The following window automatically opens:
A constraint of this type is known as a “blocking constraint”, there is no way for a user to create such an event, despite the prevention of the constraint.

Manipulating an event

Events display
Events can be displayed in a Planning View, an Agenda View, a Gantt Event View, a Kanban Event View or an Events View.

Example:
Displaying an event on a Planning View.

One can also see certain characteristics via the duration bars, notably their duration bars, notably the tooltips, in a planning or agenda view.

It is also possible to see the same events in different views simultaneously.

To facilitate the multi-view display, it is possible to synchronize the characteristics of several views.

Assignment of resources
The modification of the resources for an event triggers the application of the creation rules, as well as the verification that the events hierarchy has been confirmed.

To assign additional resources to an event, either:

- Double-click on the event > Select the resource
- Right click on the event > Modify
- Right click on the event > Assign
■ **Ctrl + Drag and Drop a resource onto an event**

Depending on existing hierarchies, the assignment of a resource to an event may lead to:

■ adding/modifying the resource on the list of resources already assigned to the event. (one resource max. per dimension)
■ or, create a sub-event which possesses all of the resources of its parent as well as this additional resource.

**Modification of the properties of an event**

The modification of the resources for an event triggers the application of the creation rules, as well as the verification that the events hierarchy has been confirmed.

To modify the properties of an event, **right click on an event > Modify**.

**Deleting an event**

To delete an event, either:

■ **Right click on the event > Delete**
■ **Select the event + press the DEL button on the keyboard**

The following message appears:

You can then click on:

■ **Yes**, to confirm the deletion of the event,
■ **No**, to not delete the event.

To delete a selection of events, either:

■ **Right click on the selected events > Delete**
■ **Select the events + press the DEL button on the keyboard**

The following message appears:
You can then click on:

- **Yes**, to confirm the deletion of the event,
- **Yes to all**, to confirm the deletion of the whole selection,
- **No**, to not delete the event,
- **Cancel**, to cancel the deletion of the whole selection.

Through the action of deletion, the event or selection no longer exists anywhere in the schedule.

This deletion operation can be cancelled by the **Cancel** button or the keyboard shortcut **Ctrl + Z**.

**Deletion of events along a single dimension**

It is possible to delete a number of events, along a given dimension, up until a given date.

See [Dimension](#)

**Selection of 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**.

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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.

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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**
Compressing events

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.

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.

**Moving an event**

**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.

**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.

**Sub-dividing an event**

It is possible to sub-divide an event into two separate events, with the same properties
This operation can also be carried out on a selection of events.

Simply **right click on the event selection > Sub-divide**

The sub-division takes place from the left of the cursor’s position.

If the event to be sub-divided has a valuation item with a fixed value, the following window will appear:

![Sub-division window](image)

Click:

- **Yes**, or **Yes to all** (if multiple events have been selected simultaneously) to spread the value of the valuation item, in line with the durations of the resulting sub-divisions;
- **No**, or **No to all** (if multiple events have been selected simultaneously) to keep the initial value for each of the durations of the resulting sub-divisions.

**Searching for events**

All users of VISUAL PLANNING may, in addition, carry out searches for one or more events in the planning view and resources view.

**“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:

![Search window](image)
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.

Events filter

It is possible to create filters for named events or to apply selection filters.

See [Events filter](#) and [Selection filter](#)

Sorting events

It is possible to **sort** events within the events view.

Overlap of events

Two events may be super-positioned over the same resource on the same date. This super-positioning is known as Doubling up.

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.

Links between events

It is possible to create links between events.

Importing events

It is possible to import one or more events.

See Importing events.

Exporting events

It is possible to export one or more events.

See Exporting events.