



PLANNINGPME

Schedule easily



TARGET SKILLS PlanningPME

Version 4.0.2. – NEW FEATURES

This document describes the new functionalities of version 4.0.2.



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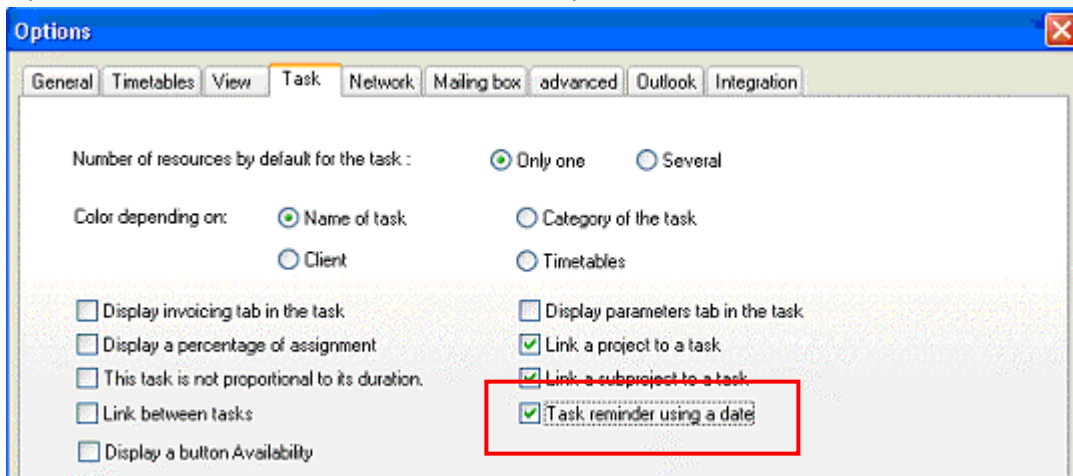
I. Introduction

This document describes all new features in version 4.0.2.
Updating your version 4.0.0. to 4.0.2. will need a conversion of the database.
Do not forget to make a back up of the database before updating the version.
This version is already available for all clients.

NB: The "Task Description" function (See Chapter VI) has been improved! You will need to do the settings again from the menu Data -> Description Task.

II. Task reminder using a date

We can now use a date as a reminder.
Option to activate in the menu Tools -> Options -> Task




Then, when creating a task, we can specify a date and time for the reminder.

Task

General Resources

Project : Project B

Label : Appointment Weak

Client : Customer2 


Resource : Only one Several

Dates

Beginning 17/04/2008 Recurrence

End 17/04/2008 All day

Comments

12:00 02/04/2008 Reminder: 

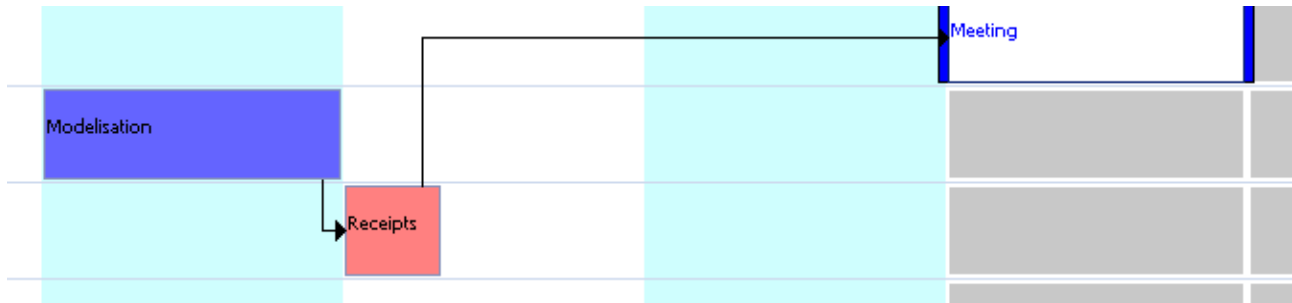
April 2008							
	Mon	Tue	Wed	Thu	Fri	Sat	Sun
14	31	1	2	3	4	5	6
15	7	8	9	10	11	12	13
16	14	15	16	17	18	19	20
17	21	22	23	24	25	26	27
18	28	29	30	1	2	3	4
19	5	6	7	8	9	10	11
Today: 14/04/2008							

OK Cancel Apply

III. Tasks dependencies / links

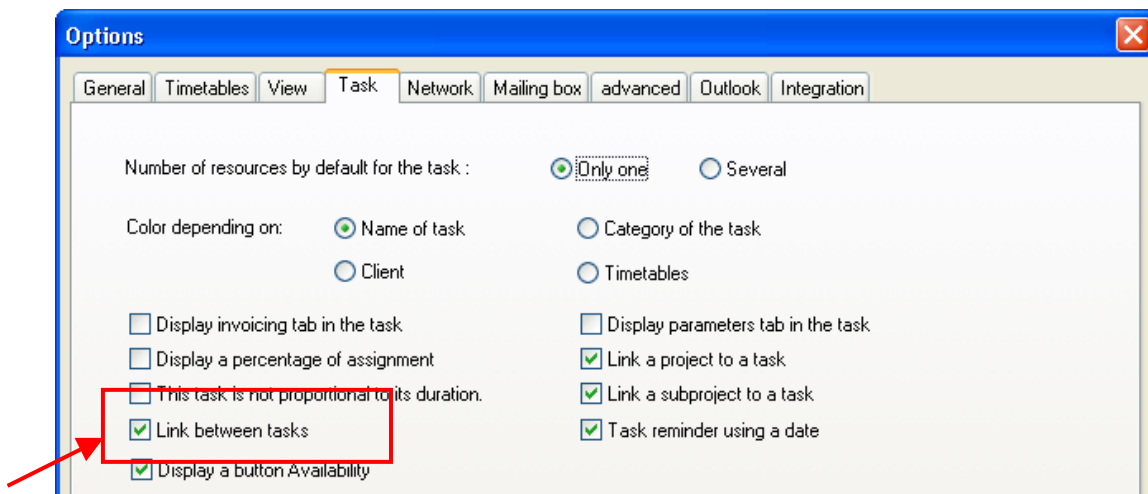
It is now possible to link tasks.

Visualisation on the planning:



III.1. How to activate this option?

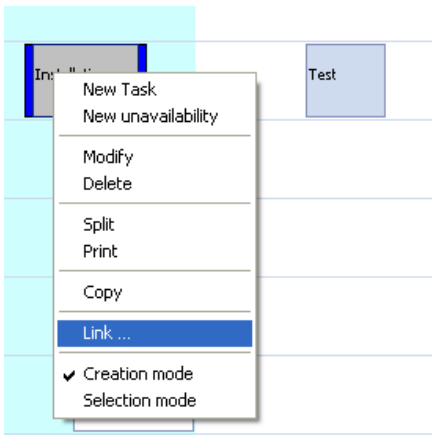
Option to activate in the menu Tools -> Options -> Task



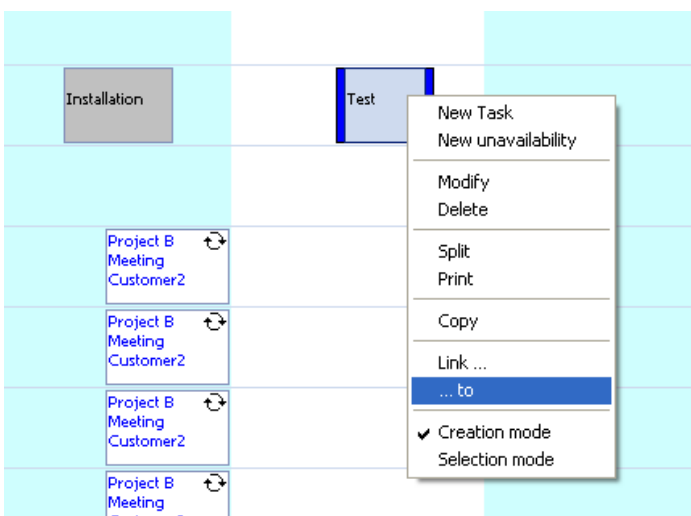
III.2. How to create a link between your tasks?

To link tasks, two possibilities:

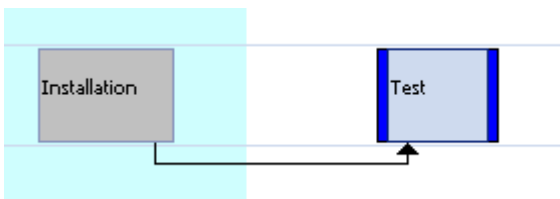
1st possibility - Go to the first task and right click, select Link...



Then, go to the second task and select ...to

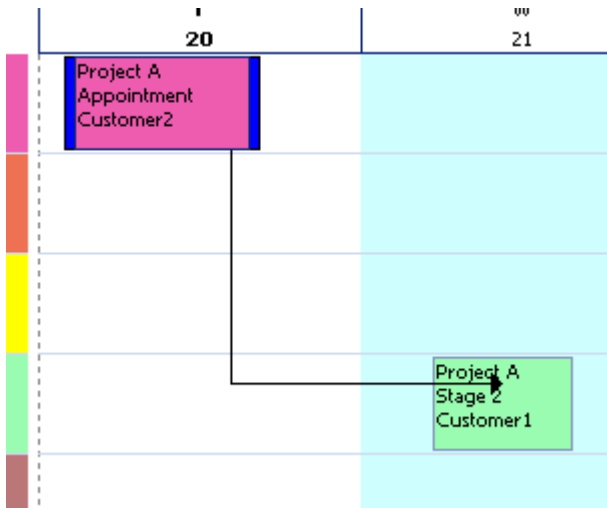


Results:



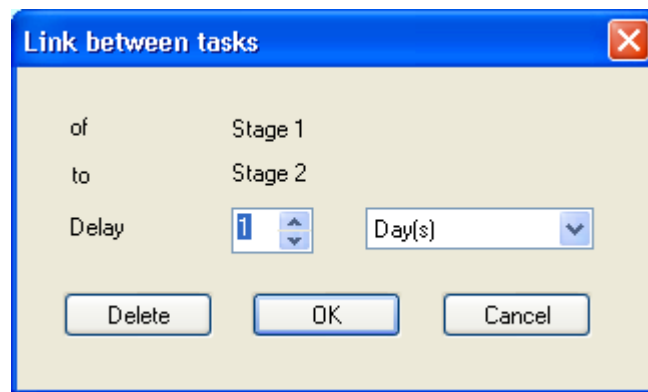
2nd possibility - Select the link icon at the top of the planning: 

Then, click on the first task and then on the second task:

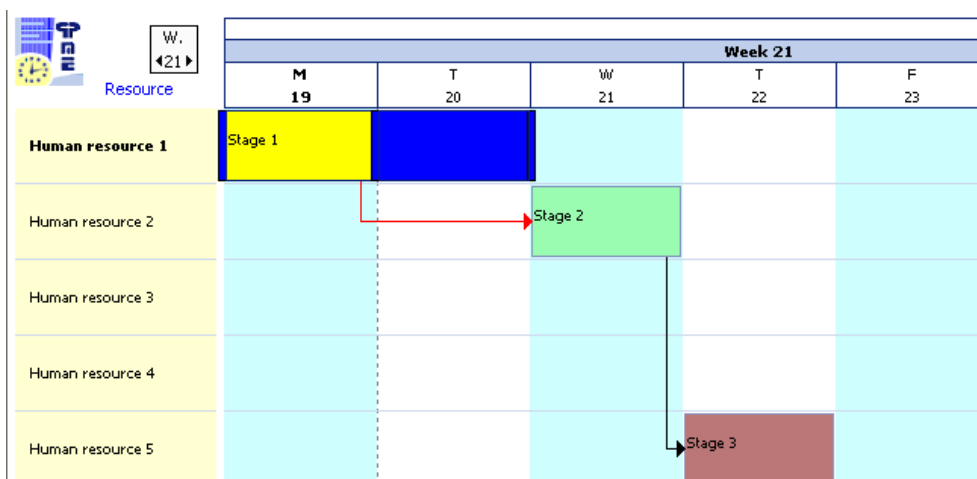


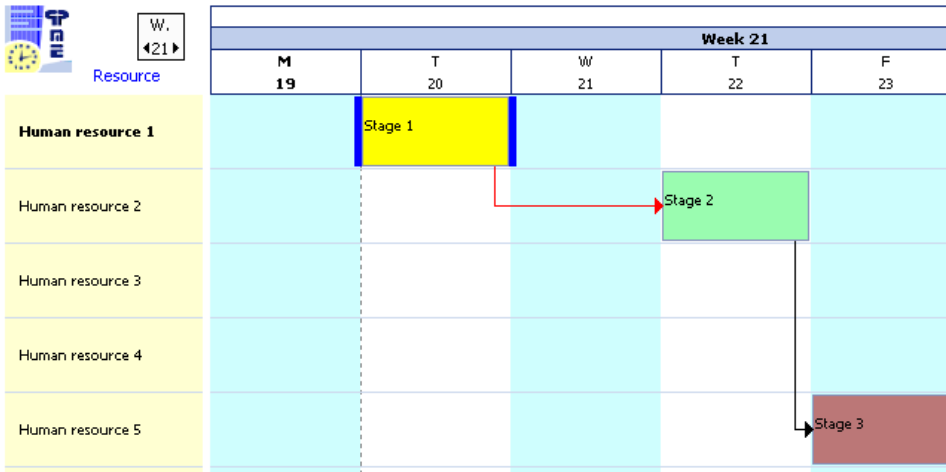
III.2. Define a delay between the tasks

You can also precise a delay between two tasks clicking on the arrow directly:



Then, while shifting the first task, the successive linked tasks will be shifted as well according to this delay:

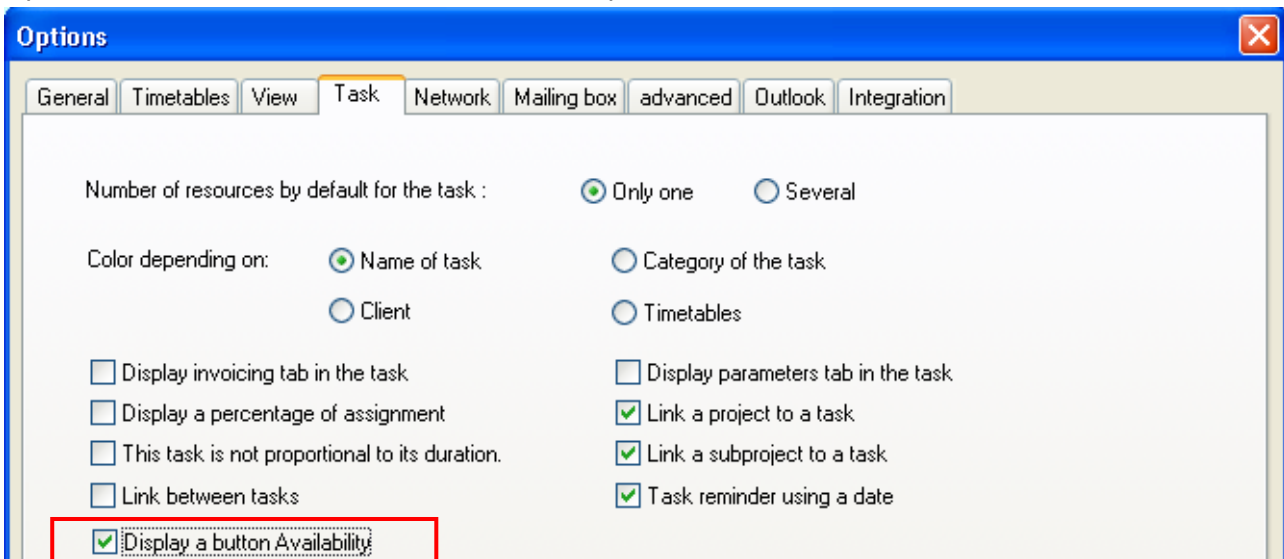




To know more: Read Function Card 18.

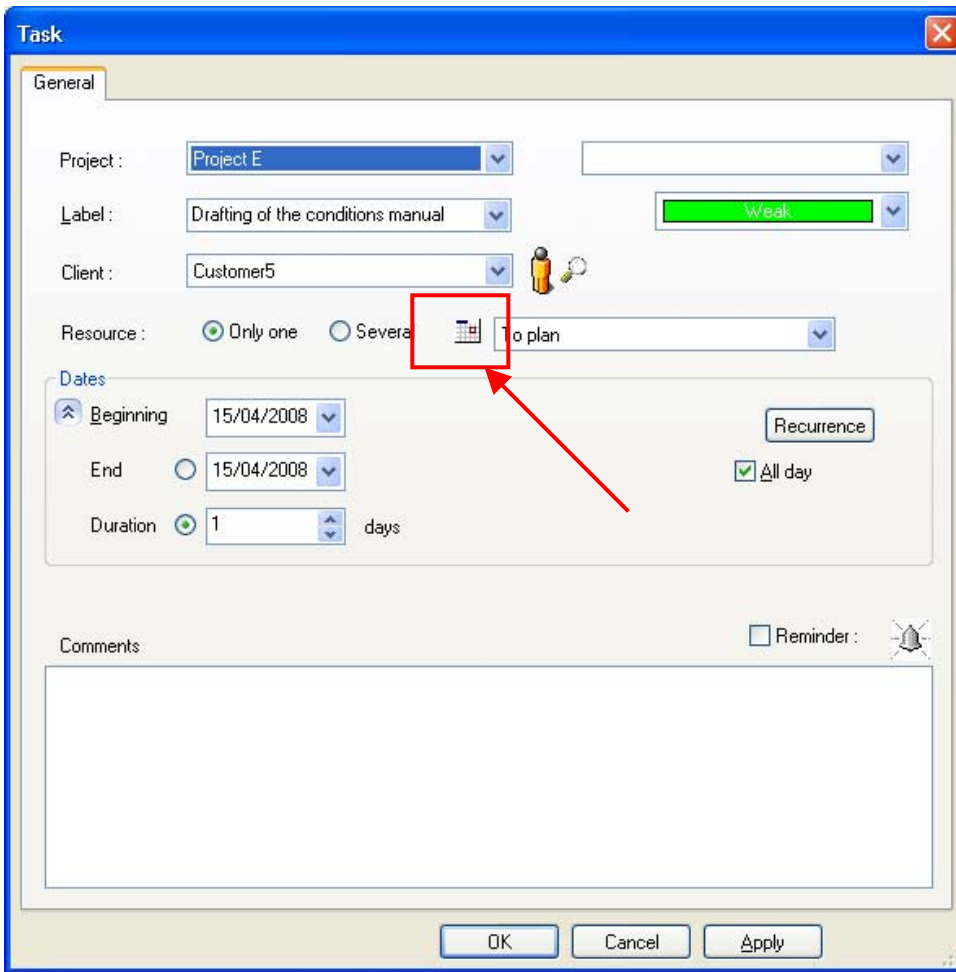
IV. Search for availability from the task window directly

Option to activate from the menu Tools -> Options -> Task



A button is now activated on the Task window:

You can find available resources for this task directly from here:




Task

General

Project : Project E

Label : Drafting of the conditions manual

Client : Customer5

Resource : Only one Several  To plan

Dates

Beginning : 15/04/2008


End : 15/04/2008

Duration : 1 days

Recurrence

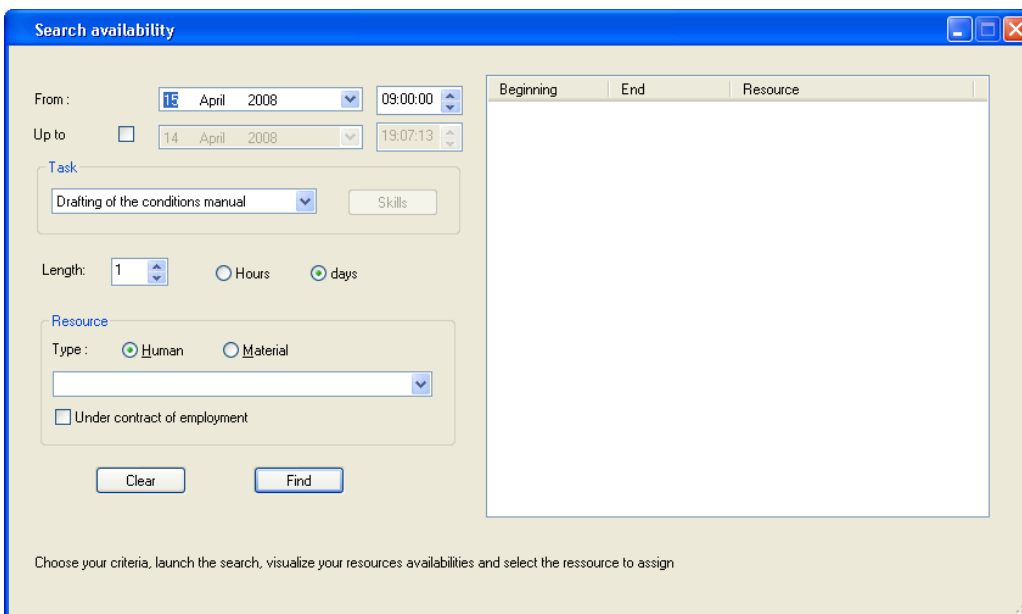
All day

Comments

Reminder : 

OK Cancel Apply

If we click on the button, the search window will appear:



Search availability

From : 15 April 2008 09:00:00

Up to : 14 April 2008 19:07:13

Task

Drafting of the conditions manual Skills

Length : 1 Hours days

Resource

Type : Human Material

Under contract of employment

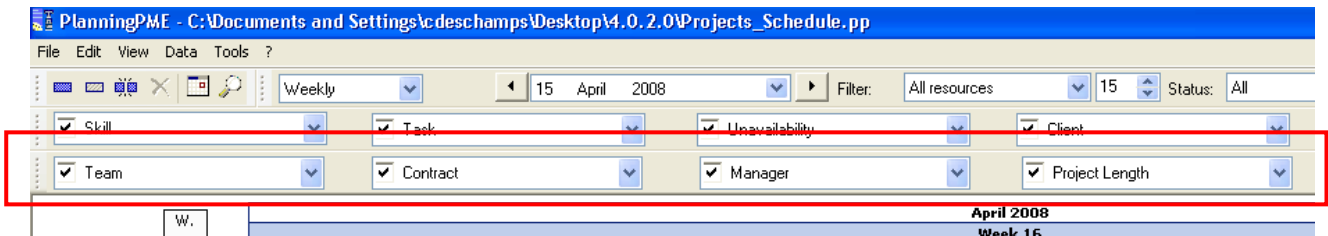
Clear Find

Beginning	End	Resource

Choose your criteria, launch the search, visualize your resources availabilities and select the resource to assign

V. Customized filter bars

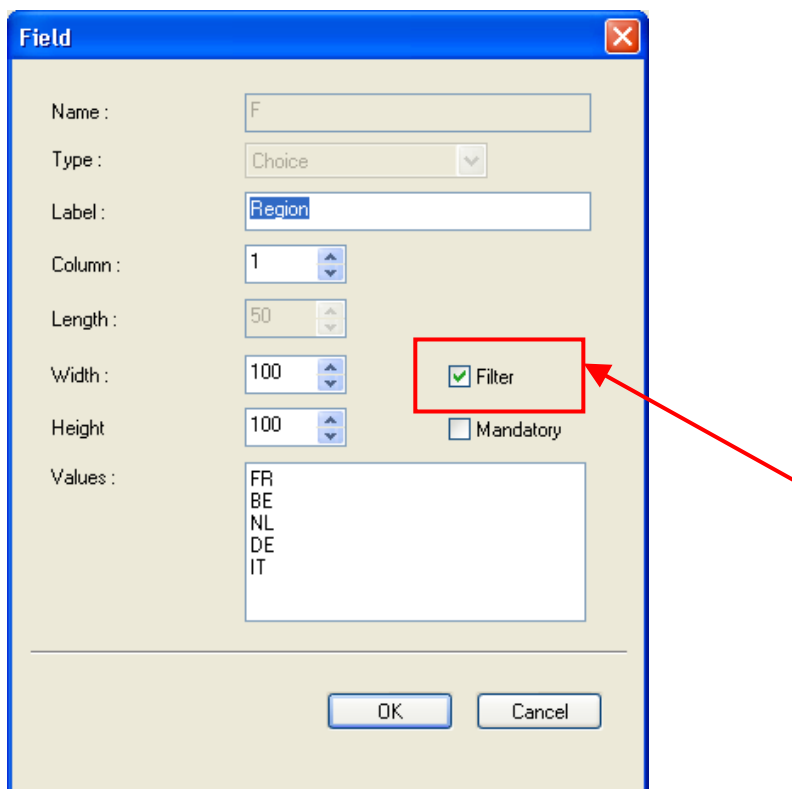
While creating additional fields of the **type "choice"**, you can activate up to 4 additional filters like shown below:

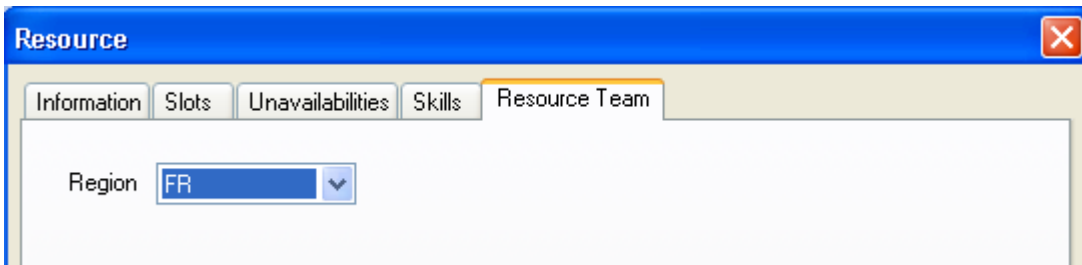


V.1. Additional fields for Human and material resources, clients and projects

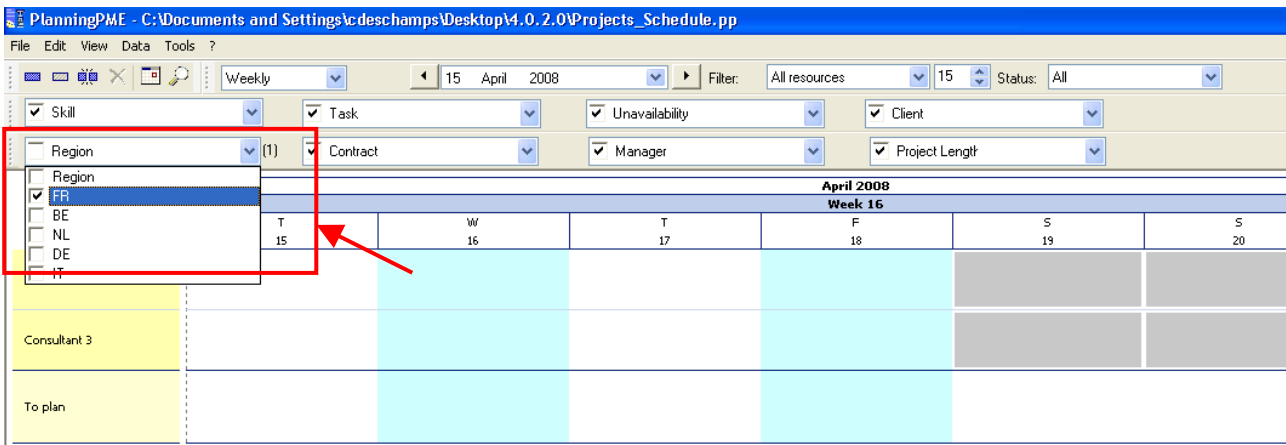
Only resources, clients and/or projects with the field selected will be displayed on the screen on the corresponding view.

For example, we create a field of the type choice named "Region" on the Human resource card. Select "Filter" in order to activate a filter in PlanningPME.



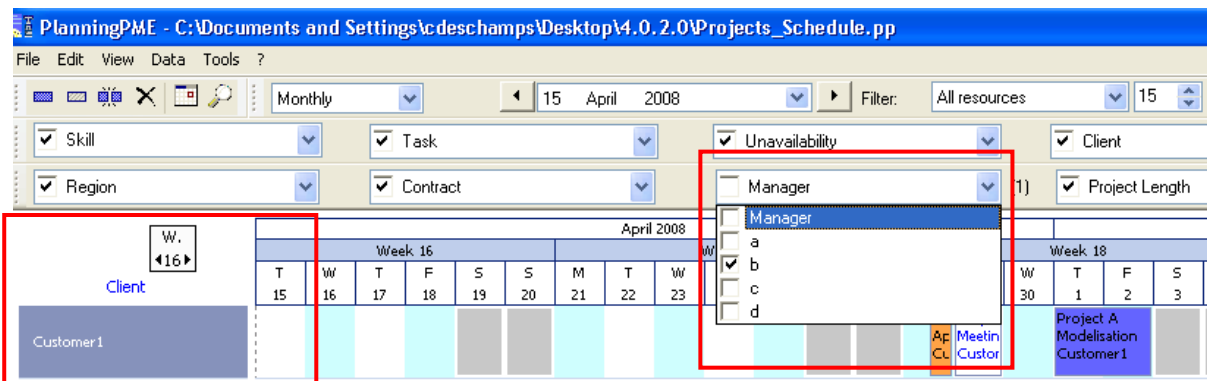


Then, on the planning board, you can filter by this field:



Only resources of region FR are displayed.

With the same principle, on the client view, if you apply a filter of an additional field of the client card, only clients with this criteria will be displayed.

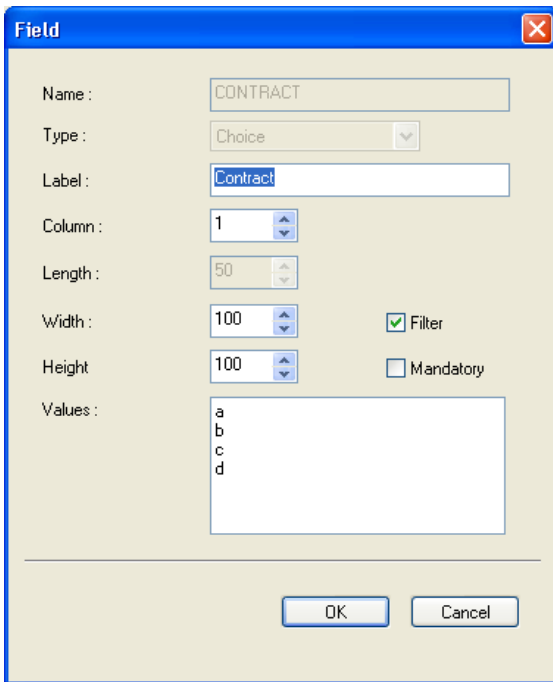


With this new function, we can create family of clients, resources and or projects easily!

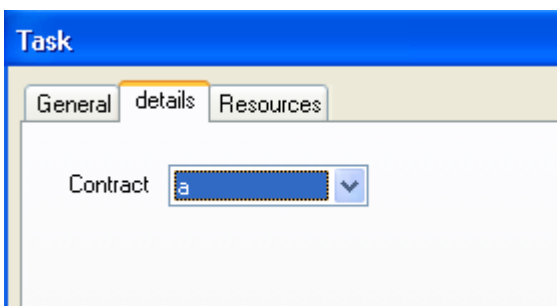
V.2. Additional fields for Tasks

The task on the planning board are now filtered on all the views.

On the example below, we created an additional field named "Contract" on the task window.

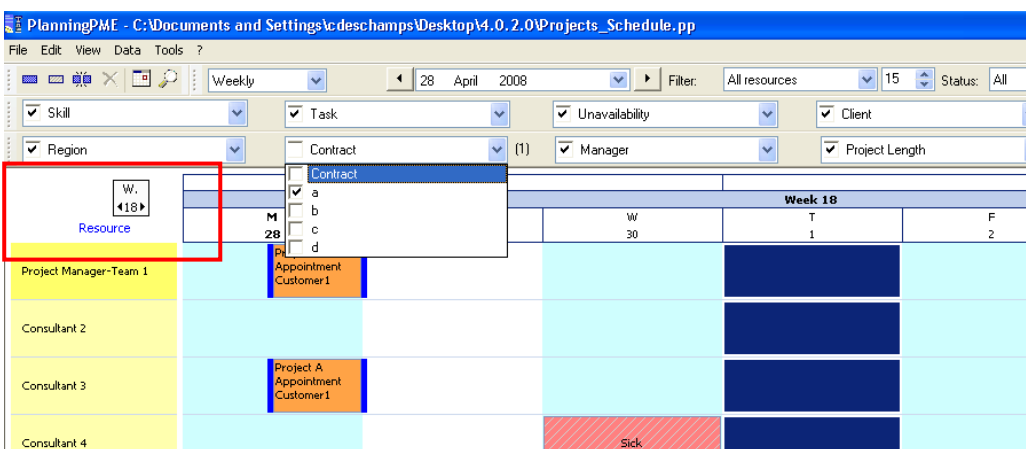


So, while creating a task on the planning board, we can specify a contract:

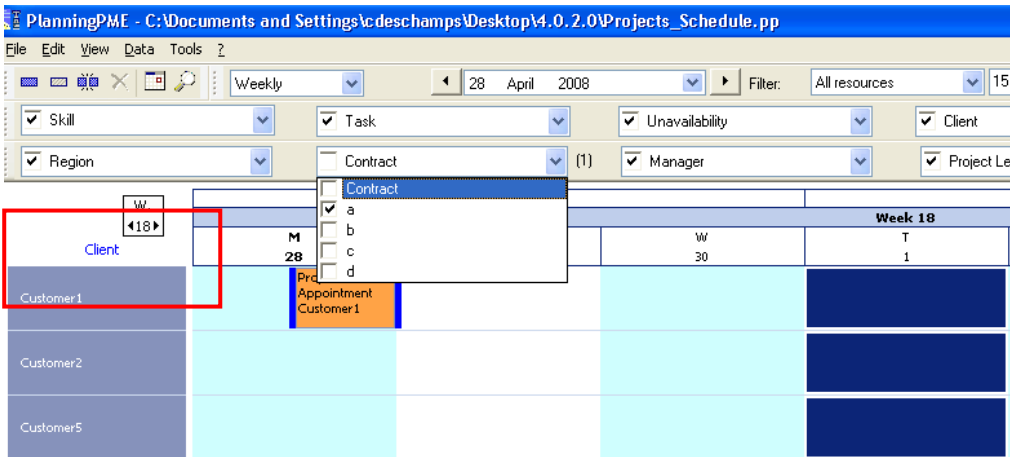


Then, applying this filter on any views, only tasks with the criteria selected are shown:

Results on the resource view:



Results on the client view:

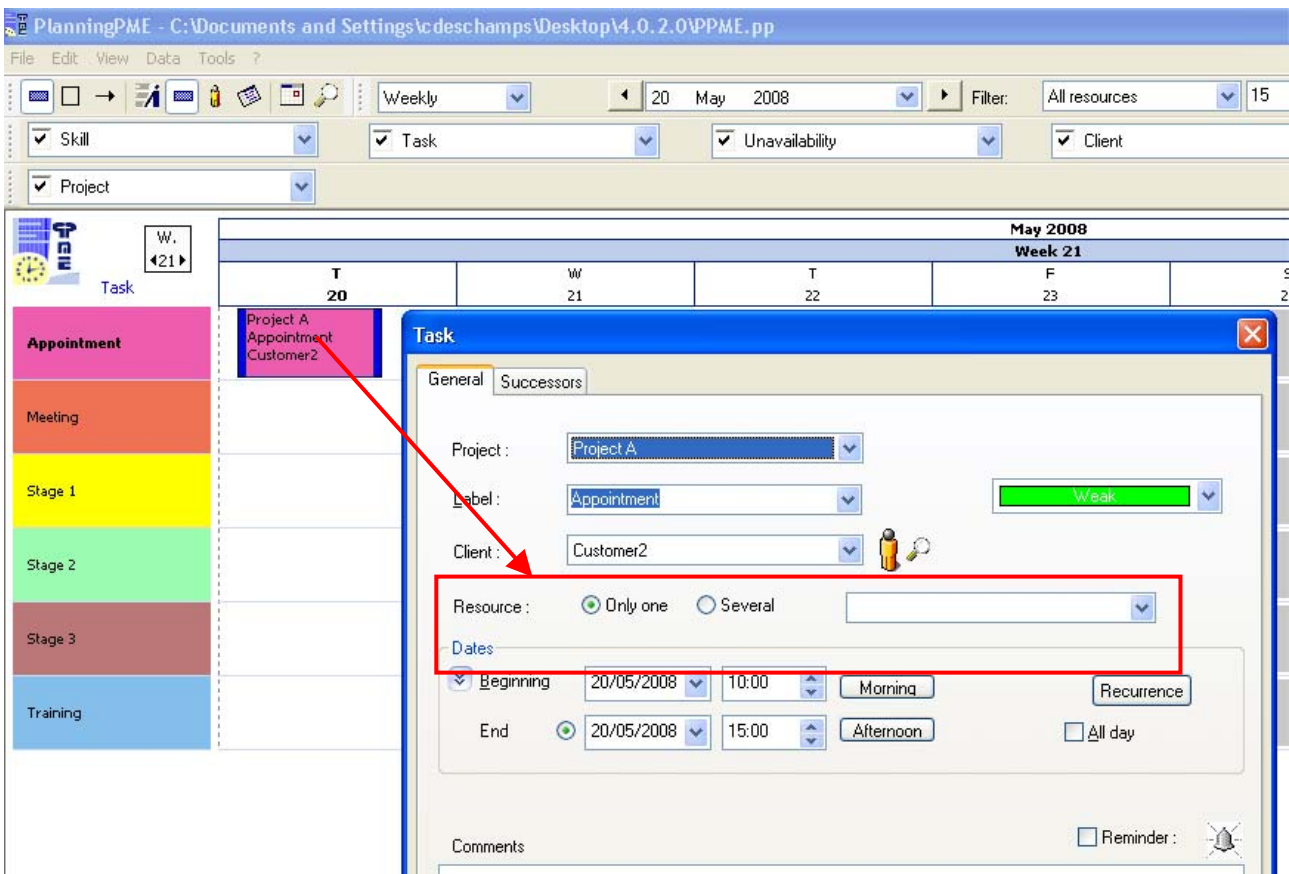


This new function allows you to filter the planning via customized additional fields of the type "Choice".

VI. Create tasks without selecting any resource

It is now possible to create tasks without specifying a resource on the views other than the resource view.

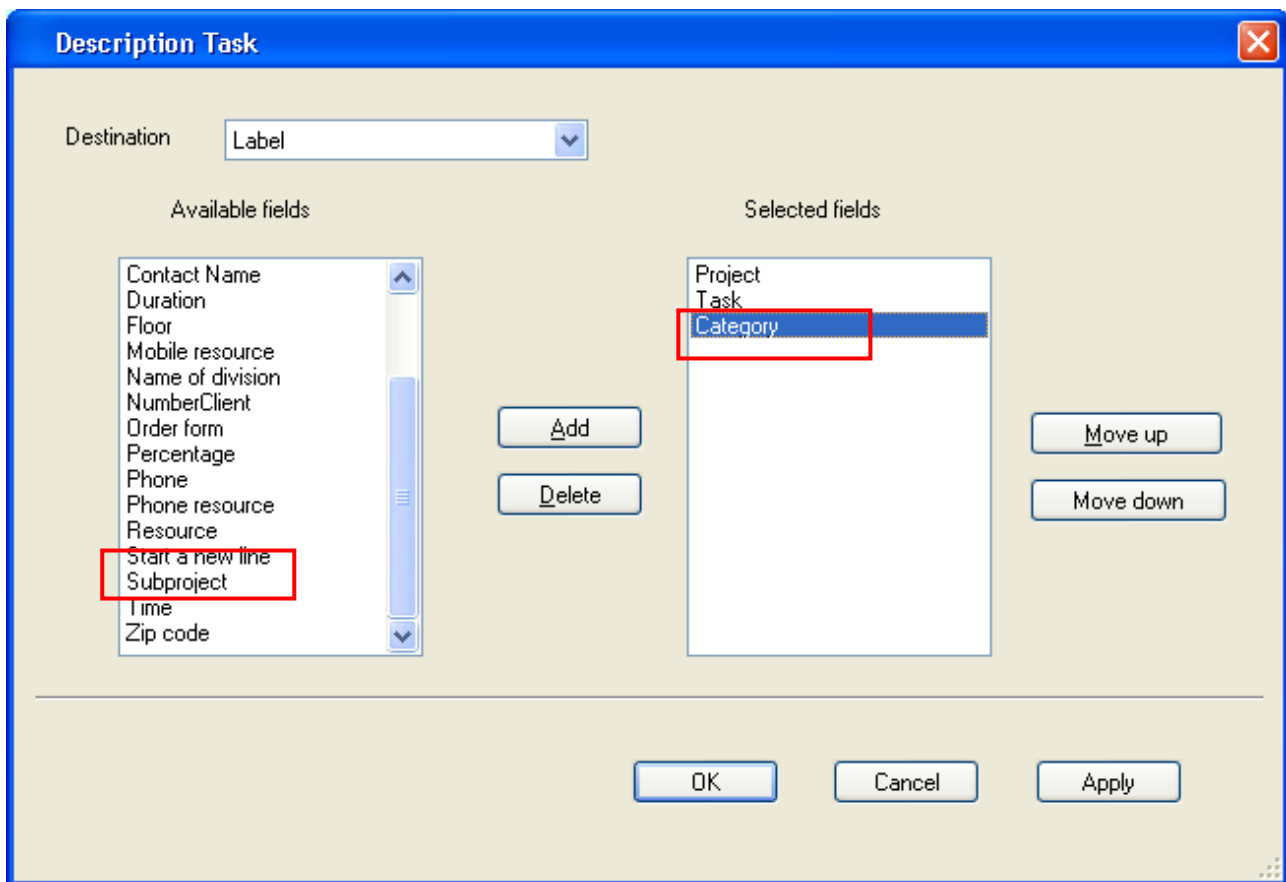
Ex:



VII. Fields category and Subproject available on the task description

From the menu Data -> Description Task, you can now select those fields:

- Category
- Subproject



You can then have them displayed on the planning board:

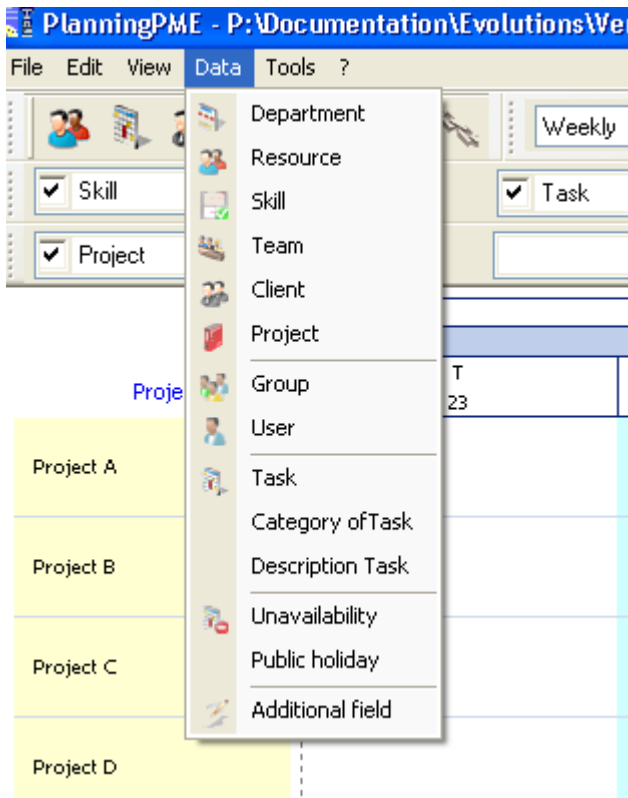


NB: As the "Task Description" function has been improved, you will need to do the settings again from the menu Data -> Description Task.

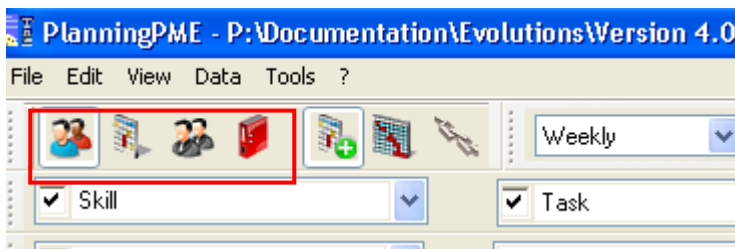
VIII. New user friendly interface

VIII.1. New icons

The interface of PlanningPME is now more user friendly with new icons:



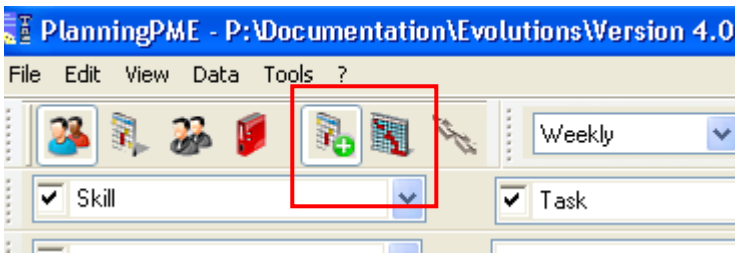
VIII.2. Switch the view easily



You can now switch the view easily with the icons on the left top side of the planning board:

- Resource View
- Task View
- Client View
- Project View

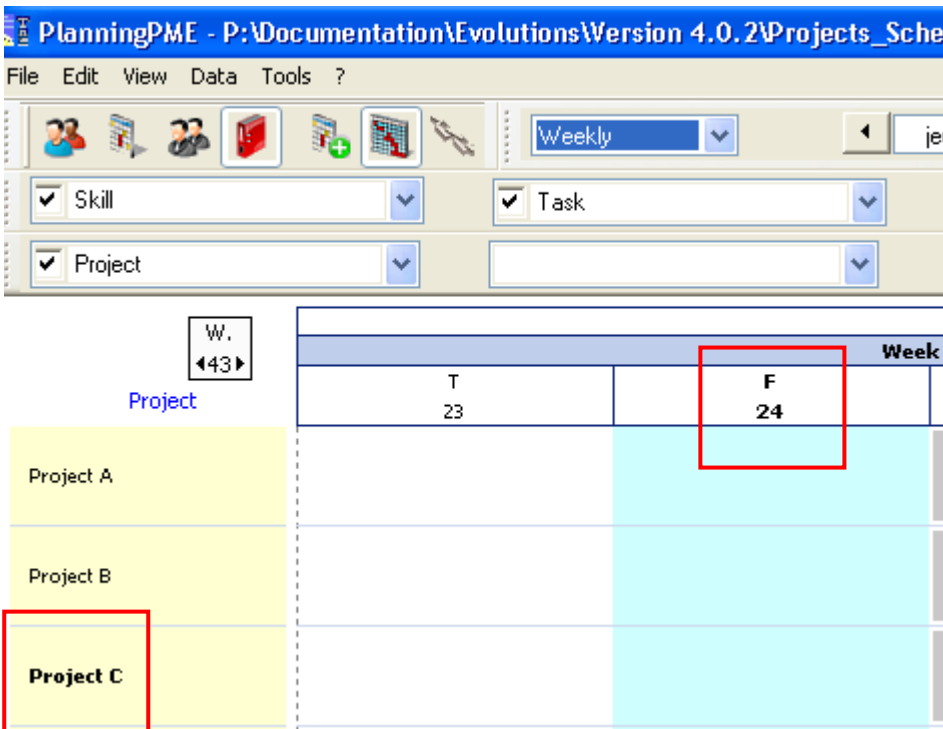
VIII.3. Creation / Selection Mode



Switch from those different modes with the corresponding icons.

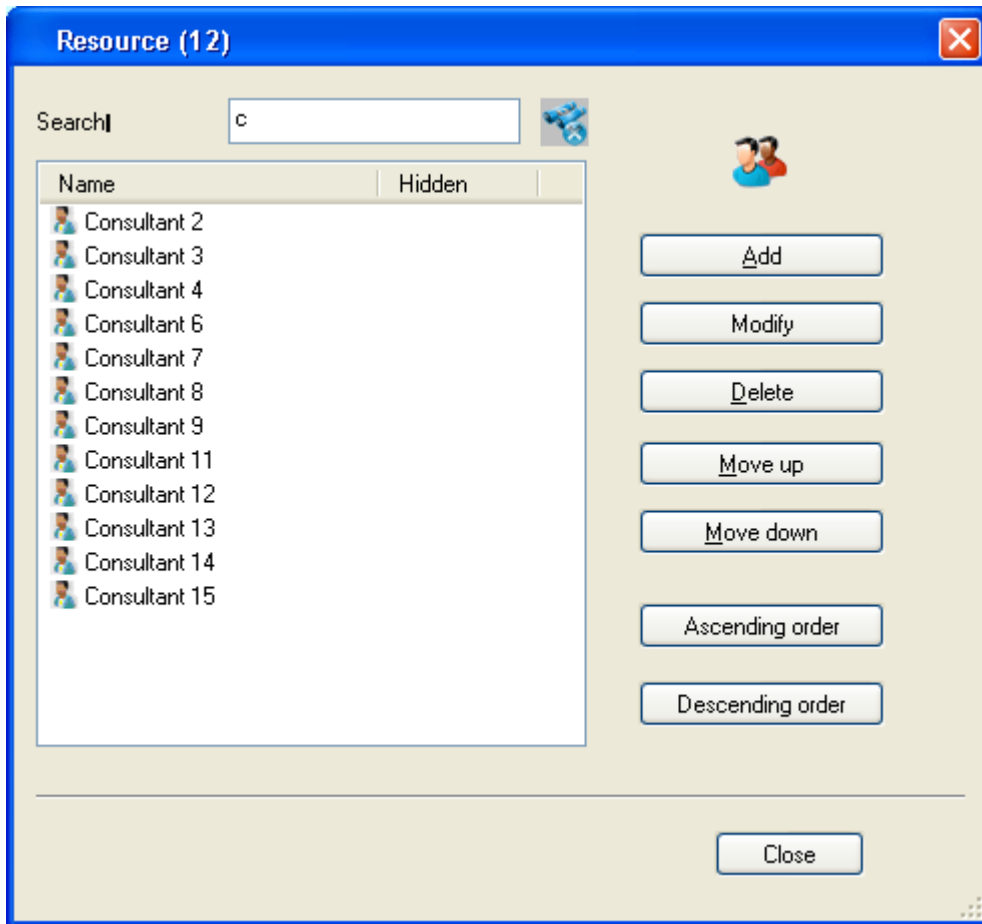
- Creation Mode: To create tasks
- Selection Mode: To shift tasks

VIII.4. Visual selection of the slot



While moving your mouse on the planning board, the different items (Days, Weeks, Months for the time axis and Resource, Client, Project, task for the x-axis) now appear in **BOLD**.

XIX. Search of resources, clients and projects improved from the Data



While typing the first letters of the name of a resource, only resources beginning by those letters appear.

This new function also work on clients and projects.