



PlanningPME

Schedule easily



TARGET SKILLS PlanningPME

10-steps User Guide

Discover the desktop application PlanningPME easily thanks to this 10 steps user guide.



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Schedule easily: Follow, collaborate, coordinate and manage on real time your activity and your resources with PlanningPME.

PlanningPME is attuned to the needs of small and large companies alike whatever their activity. It is suitable for a variety of business situations. You can share the schedule and everyone will have access to the information on real time.

It enables companies to manage scheduling easily and provides an accurate global view of human and physical resources in real-time in just one click.

Discover step by step our scheduling software with this memento. Step by step, learn using PlanningPME !

Some features

- **Organize** your activity
- **Share** the schedule on the **network**
- Schedule your meetings and appointments
- Manage Days Off and vacation
- Drag-and drop
- Copy / Paste

Download trial version

The trial version is available on our Web site.

It is limited to 30 uses and 200 tasks creation. The trial version is protected against hacking: you are not allowed to delete tasks in the trial Version.

You can download our software clicking on the following link:

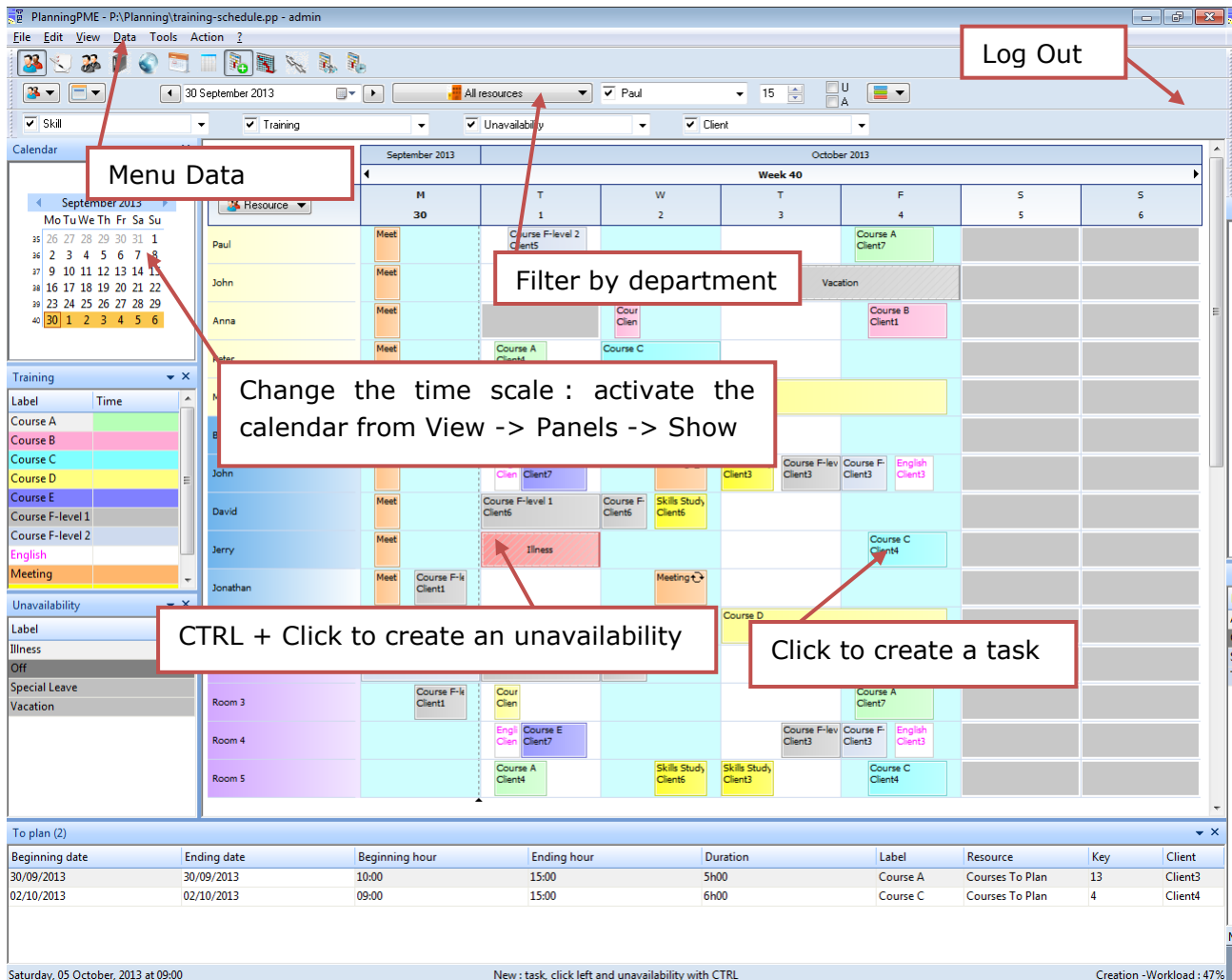
http://www.planningpme.com/InfosTelechargements.asp?FTP_FILE=PlanningPME.exe

On this page:

- Fill in the form
- Check it
- Then, you will have access to the links to download PlanningPME and to the installation code.

Once the software installed, the wizard will help you to set up PlanningPME

Overview



The screenshot displays the PlanningPME software interface. At the top, there is a menu bar with options like File, Edit, View, Data, Tools, and Action. Below the menu bar, there are several dropdown menus and filters, including 'All resources' and 'Paul'. A 'Log Out' button is located in the top right corner. The main area is a calendar view showing a grid of days from September 30 to October 6, 2013. The calendar is populated with various tasks and unavailability blocks, each labeled with a resource name and a task name. For example, 'Paul' has a 'Meet' task on September 30, and 'John' has a 'Meet' task on September 31. There are also unavailability blocks for 'Illness' and 'Vacation'. A 'Menu Data' box points to the left sidebar, which contains a list of resources and their associated tasks. A 'Filter by department' box points to the 'All resources' dropdown. A 'Change the time scale : activate the calendar from View -> Panels -> Show' box points to the 'View' menu. A 'CTRL + Click to create an unavailability' box points to a red 'Illness' block. A 'Click to create a task' box points to a blue 'Course C' block. At the bottom of the interface, there is a 'To plan (2)' table with columns for 'Beginning date', 'Ending date', 'Beginning hour', 'Ending hour', 'Duration', 'Label', 'Resource', 'Key', and 'Client'. The table contains two rows of data. The status bar at the very bottom shows the current date and time, and some system information.

Vocabulary used in the software

Human resource: A human resource is a physical person: an employee, technician, teacher,...

Material resource: A material resource can be several things: a room, a car, a computer, or any material you need to manage.

What is a task?

A task is a mission, a work to do by a human or material resource. A task is represented by a colored rectangle on the schedule. A task can be: an appointment, room booking, training, or anything specific to your activity.

What is an unavailability?

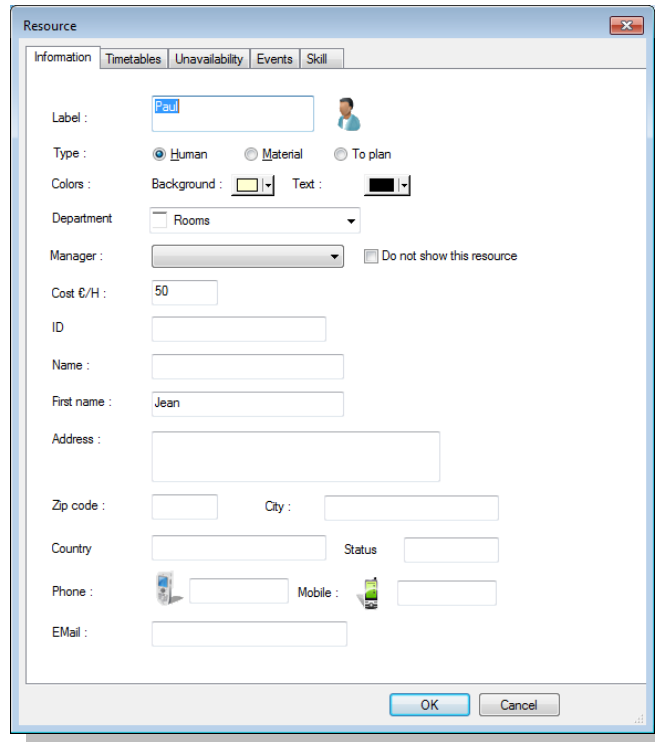
An unavailability is a day off, a period when the resource is not available. An unavailability can be: holidays, days off, illness,...

What is a department?

A department is a group of human and/or material resources. Once departments created, you will be able to filter the schedule by department in order to display specific resources.

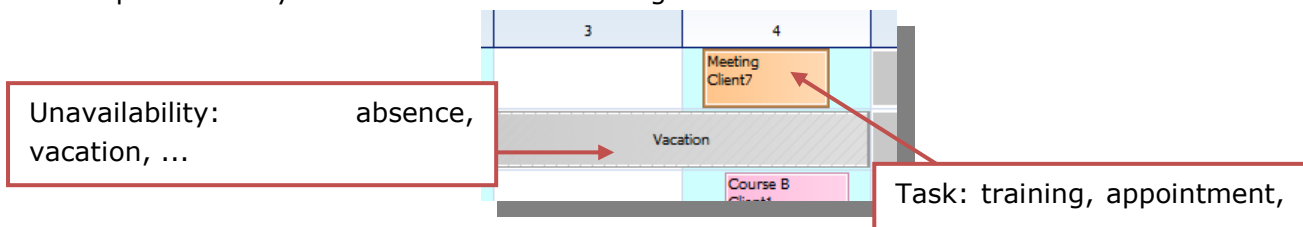
Create your resources and departments

You can create as many resources as needed from the menu **Data -> Resource**.

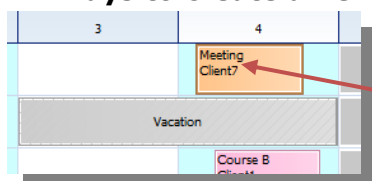


Manage your tasks or unavailabilities on the schedule

On the schedule, a task will be represented by a coloured rectangle and an unavailability will be represented by a hatched coloured rectangle.



Ways to create a new task

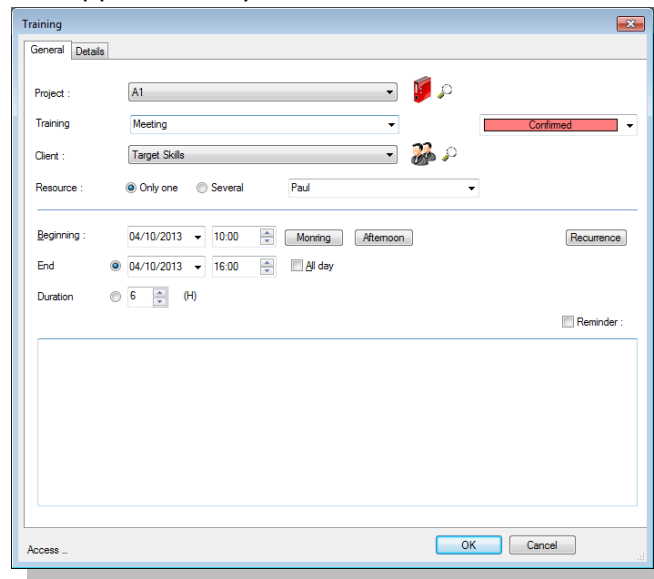


By default, the color is the one you selected for the task label on the menu Data -> Task

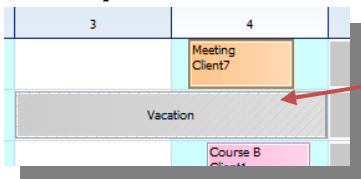
- Draw a rectangle on the schedule with your mouse
- Double click on the planning board

- Right click and select "New Task"
- Click on the menu "Action" - > New Task

Then, the following window appears and you can fill in those different information.



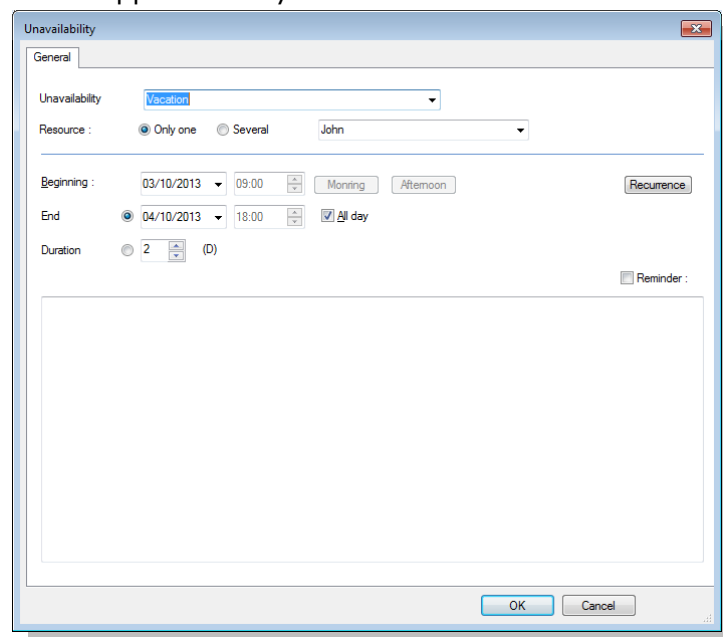
Ways to create an unavailability



By default, the color is the one you selected for the unavailability label on the menu Data -> Unavailability

- Right click and select « New unavailability »
- Draw a rectangle on the schedule with your mouse pressing the key "CTRL"
- Click on the menu "Action" - > New Unavailability

Then, the following window appears and you can fill in those different information.



Copy / Paste

Select the task or unavailabilities, right click and select "Copy". Then paste it via a right click and "Paste".

Create Multi-resources tasks

On the « Task » window, select "Several" resources and the tab « Resources » will appear. Select the resources from the list and save.

Drag and Drop

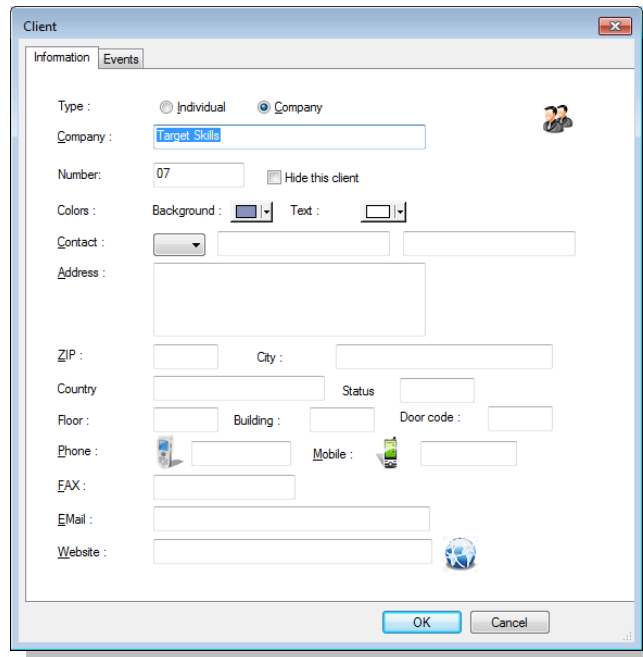
Select the task or unavailability and shift it via a drag and drop directly on another resource and/or on another date.

Manage your clients

You can manage your clients. The number of clients is not limited.

Activation from the menu Tools -> Options -> Data and select "Link a customer with the task".

You now have a new menu "Client" from the menu "Data".



You have several ways to create and modify or delete your clients:

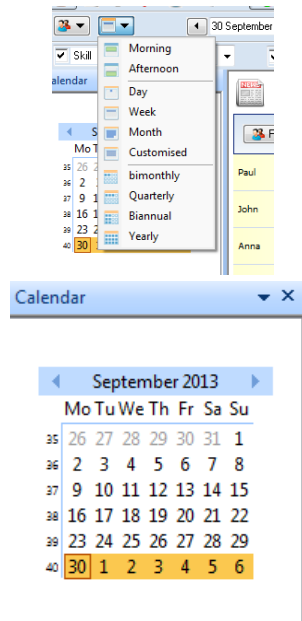
-> from the menu Data -> Client

-> from the icon  within the task window

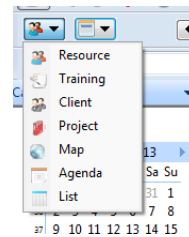
Navigation

Time period displayed

Interactive Calendar to display from the menu View -> Panels -> Show

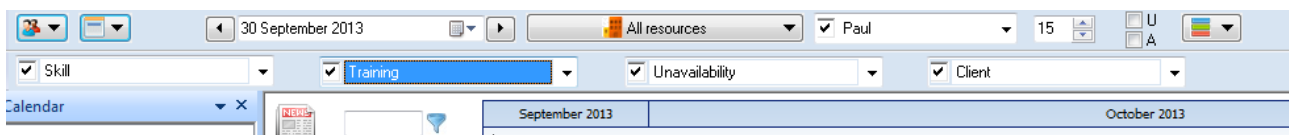


Change the view: Resource, Task, Client, Project from the drop down filter:



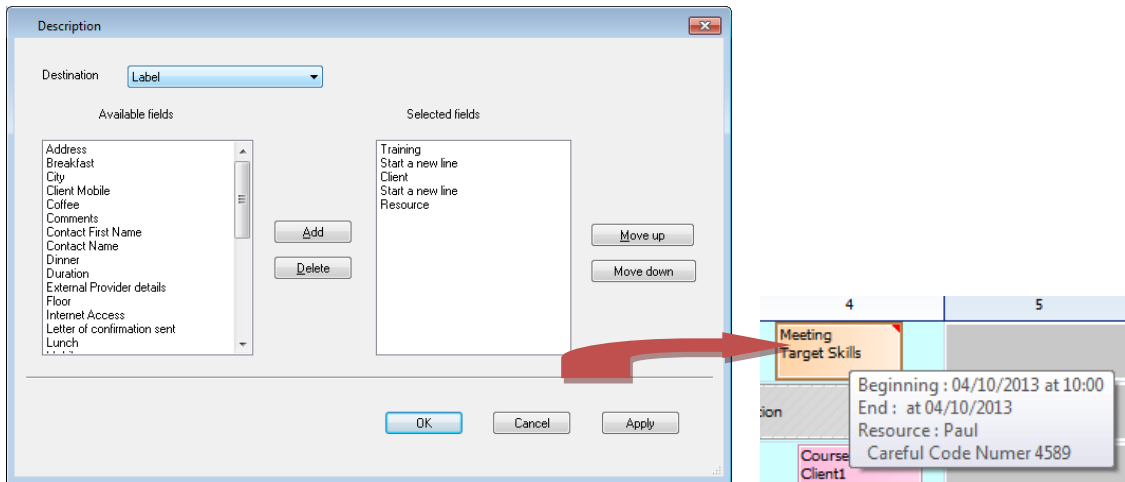
Filter by department, by client etc...

You have drop down filters at the top of the planning board to filter by department, by client etc...



Select fields displayed for the box, the tooltip

You can customise the data displayed on the screen from the menu View -> Description -> Task or Toolti^p



Label: Boxes that represent tasks

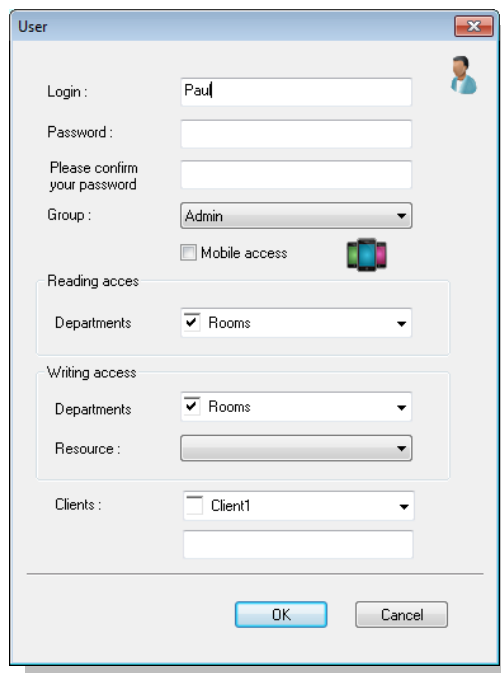
Tooltip: Fields on the yellow tooltip that appear when you put your mouse on a task.

Create users

With a login and a password, each user will have specific access to the planning: access to one or several departments, possibility to add, modify and/or delete tasks, clients etc..

There are two steps to create users rights from the menu Data:

- Create groups with specific rights from Data -> Group
- Create users with specific access from Data -> User



Contact

You are now ready to use the desktop planning application PlanningPME.

To go further, you have the full documentation available from here:

<http://www.planningpme.com/documentation.htm>

We also invite you to visit our website: www.planningpme.com to find out the complete products range.

Moreover, have a look at the complementary modules for an optimal management of your human and material resources.

For any information, do not hesitate to contact our commercial department

 : **+33 1 69 47 10 00**
or your **Target Skills** contact

We thank you for your confidence and wish you a pleasant and effective use of your planning.

