



PlanningPME
Schedule easily

General set up of the software

I. Description

The parameters you chose while doing the set up of the schedule with the wizard can be modified at any time.

- Open days of the company
- Open hours of the company
- Insertion of your logo
- Assign one task per resource at the same time
- Forbid the creation or modification of tasks before a certain day

Moreover, a lexicon on chapter III will help you understand the terms used in the software.

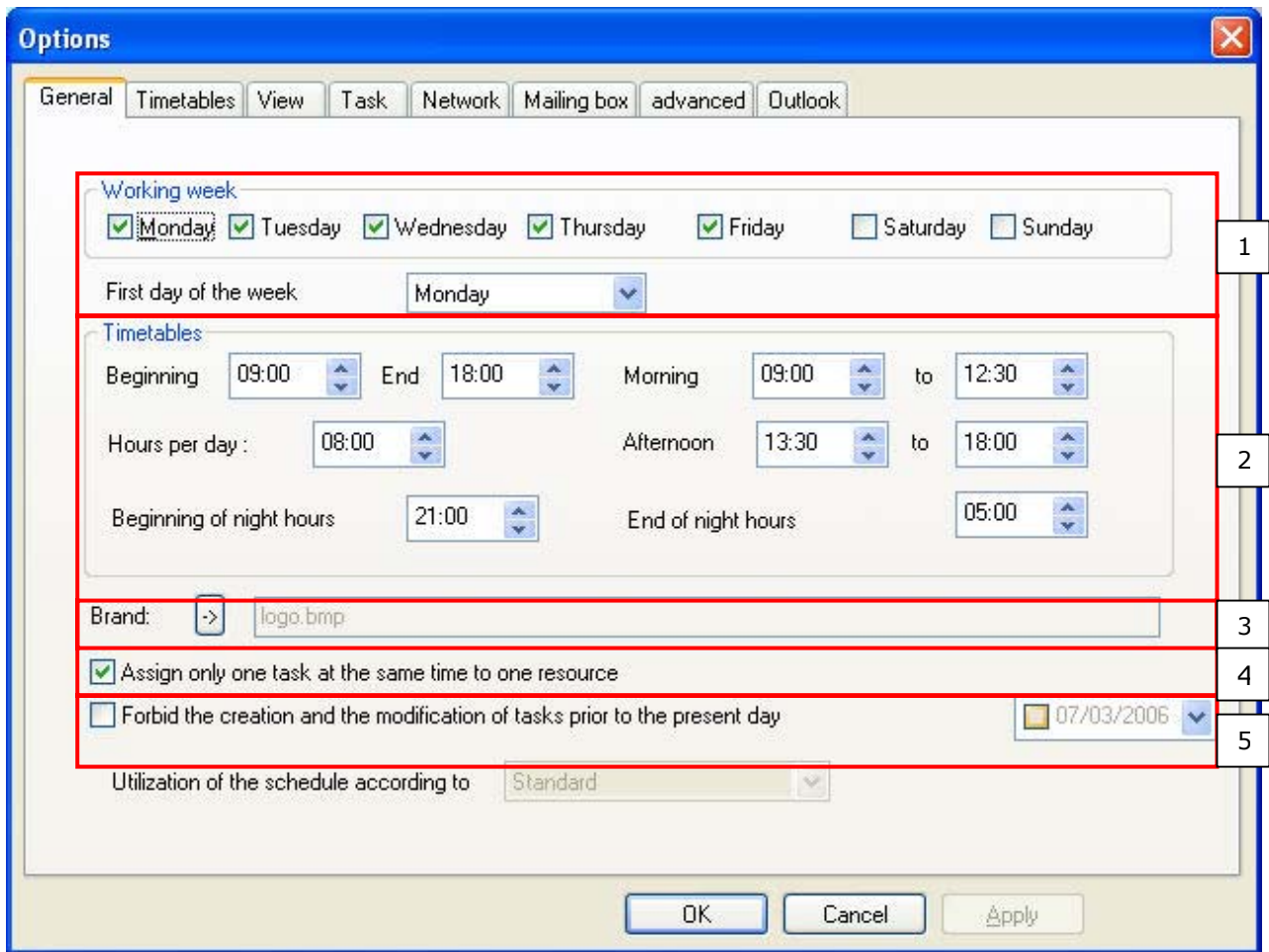
During your first use, we advise you to read this 10-steps user guide :
http://www.planningpme.com/ftp/PlanningPME-10_first_steps.pdf

II. How to change those parameters?

From PlanningPME, go to the menu « Tools » -> « Options »

The screenshot shows the PlanningPME software interface. The title bar reads "PlanningPME - C:\Program Files\Target Skills\PlanningPME\PlanningPME.pp". The menu bar includes "File", "Edit", "View", "Data", and "Tools". The toolbar contains various icons and a "Weekly" dropdown menu. The main area displays a weekly schedule grid for March 2006, Week 10. The grid has columns for days: T (7), W (8), T (9), and F (10). Resources are listed on the left: George (yellow), Laure (orange), and Human resource 3 (purple). A yellow "Appointment" task is visible on Friday, March 10th.

We are going to describe 5 points of the general tab:



Point 1 : Working week

Select the opens days of the company and the first day of the week.

Not worked days will appear greyed out on the schedule.

NB : The slot of the resource will be priority on the general set up. See card 1.

Point 2 : Hours

Select the beginning and end hours of the day then click on "OK".

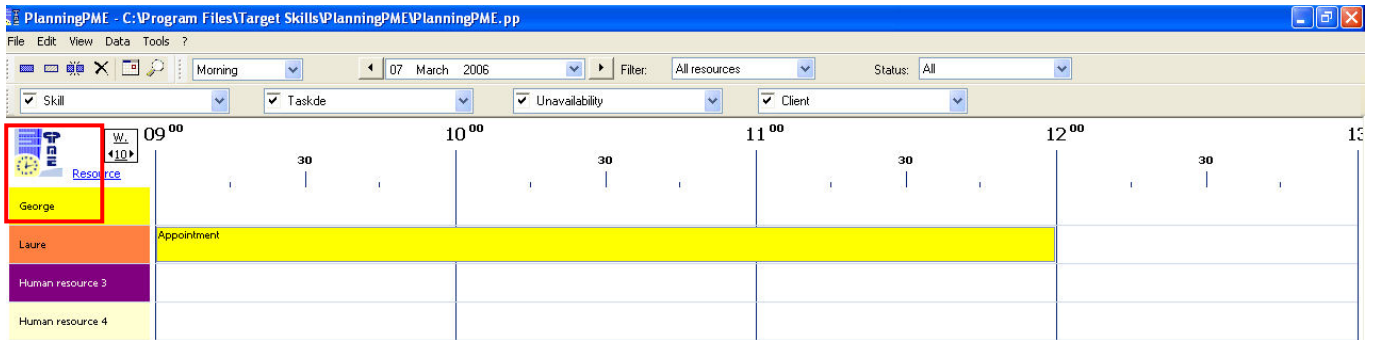
On a daily view, the entire day will take into account the hours entered.

As well, the views "Morning" and "Afternoon" will take into account the hours mentioned.

Point 3 : Logo

You can insert your logo on the left top side of the schedule

This file must be on a format Bitmap, dimensions 45*45



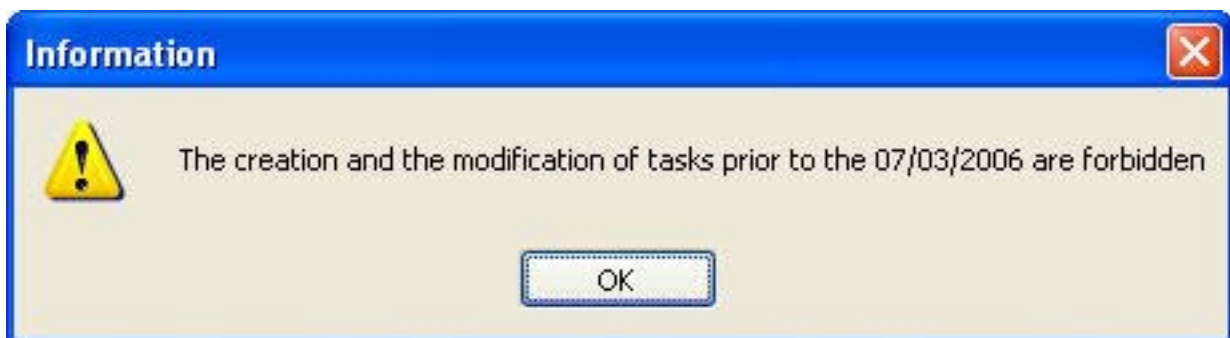
Point 4: Assign only one task at the same time to a resource

Ticking on this box, you will avoid booking conflicts. An alert message will inform that the resource X is already occupied the day Y:



Point 5 : Forbid creation and modification of tasks prior to the current date

Ticking on this box, you can choose to forbid any changing of tasks prior to the present date or another given date. A message will inform you that the creation of tasks is forbidden:



III. Lexicon of the software

→ **What is a human resource?**



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

→ **What is a 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 coloured 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 : hollidays, days off, illness,...

→ **What is a resource "to plan"?**

The resource "To plan" is a post-it. Each task assigned to a resource "To plan" **will appear on the schedule whatever the visualization mode** (daily, weekly...) **and the date.**

→ **What is a department?**

A department is a group of human and/or material resources

A department can be a technical, sales service in a company.

Then, you will filter the schedule by department in order to display the resources of a department on your screen.

www.planningpme.com