



PlanningPME
Schedule easily

Card n°4: Skills management

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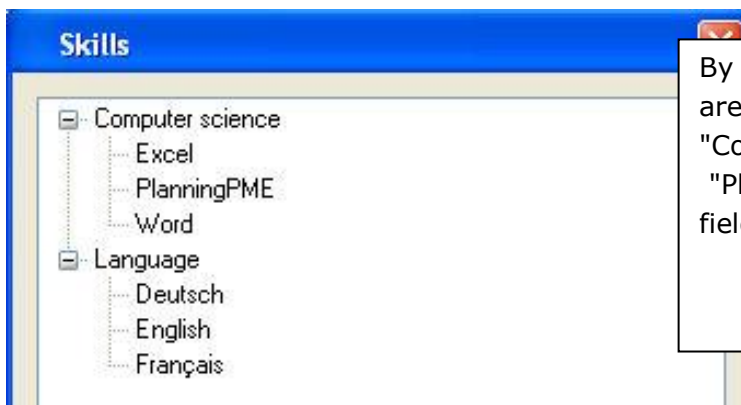
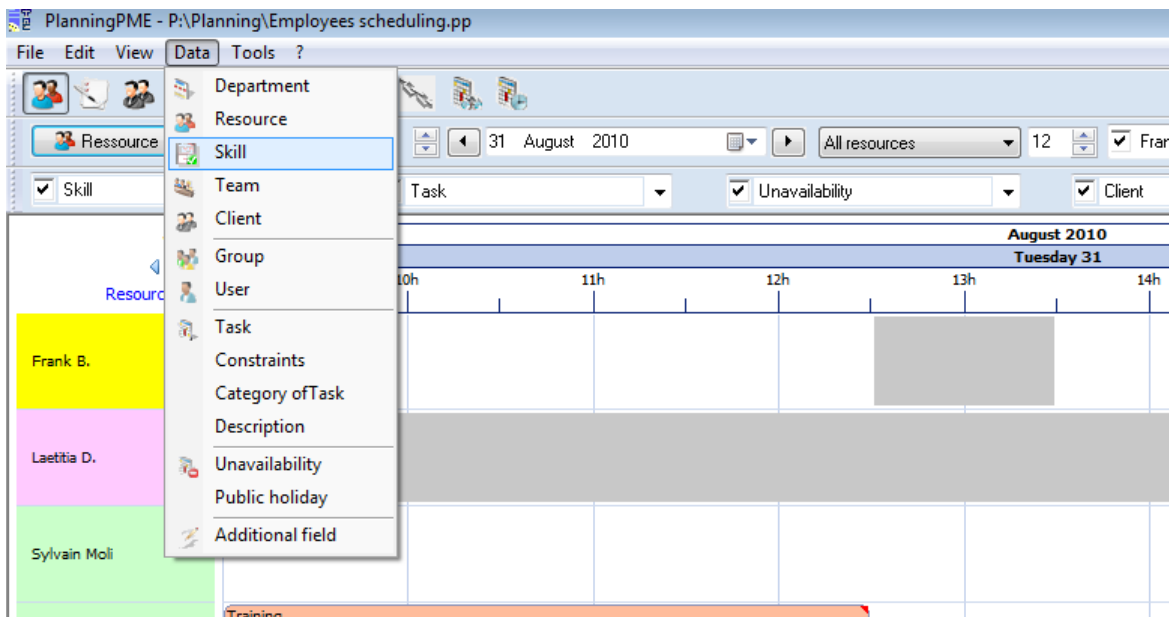
I. Description of this feature

Create and assign skills to your resources and to your tasks depending on your activity.
Affect a task requiring specific skills to resources with those specific skills.
You can look for skilled resources available for a mission.

► Manage easily skills of your resources

II. How to set up skills ?

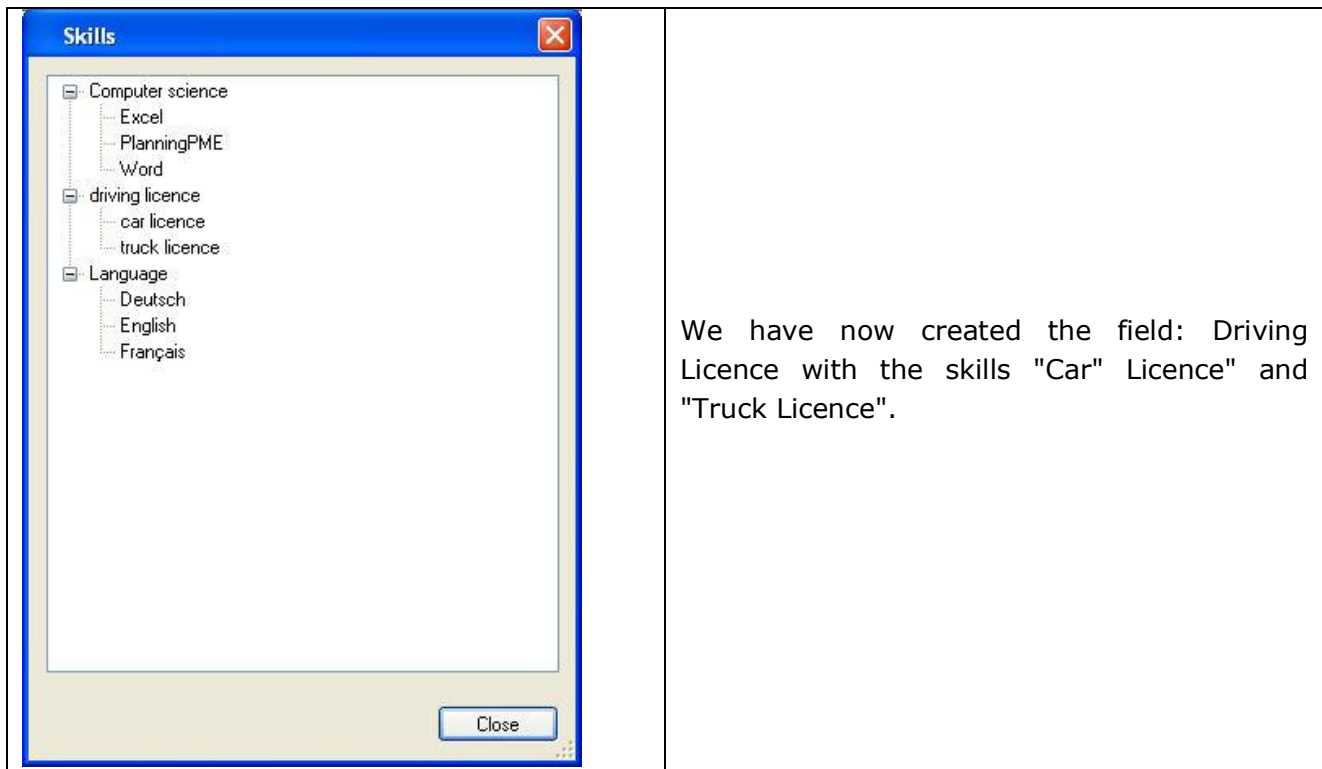
First, create specific skills to your sector and/or profession
From PlanningPME, Go to the menu "Data" -> "Skill"



By default, two fields with three skills each are registered on the database.
"Computer science" is a field.
"PlanningPME" is a skill belonging to the field "Computer science"



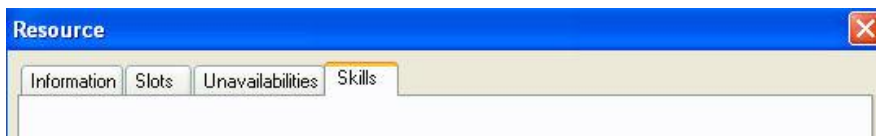
	<p>To create a field, put your mouse on a blank space of the window.</p> <p>Click on the right button of the mouse. Then choose "Add a field".</p>
	<p>Type a name to your field. Then "save".</p>
	<p>The field "Driving licence" has just been created.</p> <p>To create a skill: Select the field where you want to add your skill Then "right click" with your mouse and select "Add a skill"</p>
	<p>Type a label. Then "save".</p>



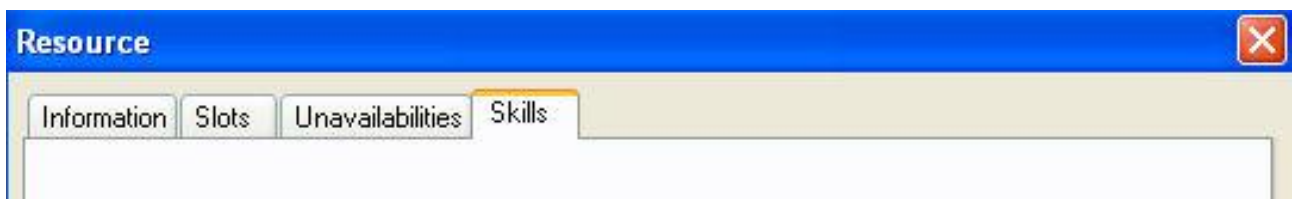
Following the same process, you can create as many fields and skills as wanted.

III. How to assign skills to your resources ?

You can assign skills to your resources in just some clicks. Here is the way to proceed: Open the card of a resource and go to the tab "Skills".

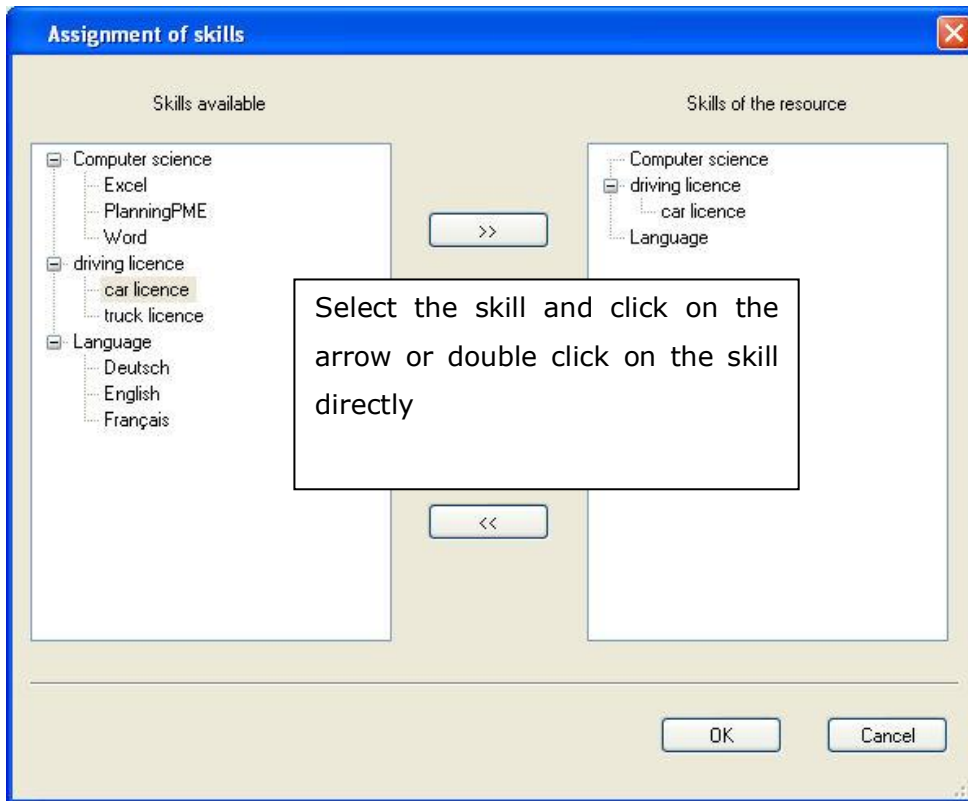


Click on the button "Assign skills" at the bottom of this window.



NB : Clicking on the double arrow, all the skills are assigned to the resource. For a human resource without particular skills, you can assign all the skills by default. So, while creating multi-resources tasks, you will not have any skills adequation problems.

You have assigned a skill Car licence to your resource.

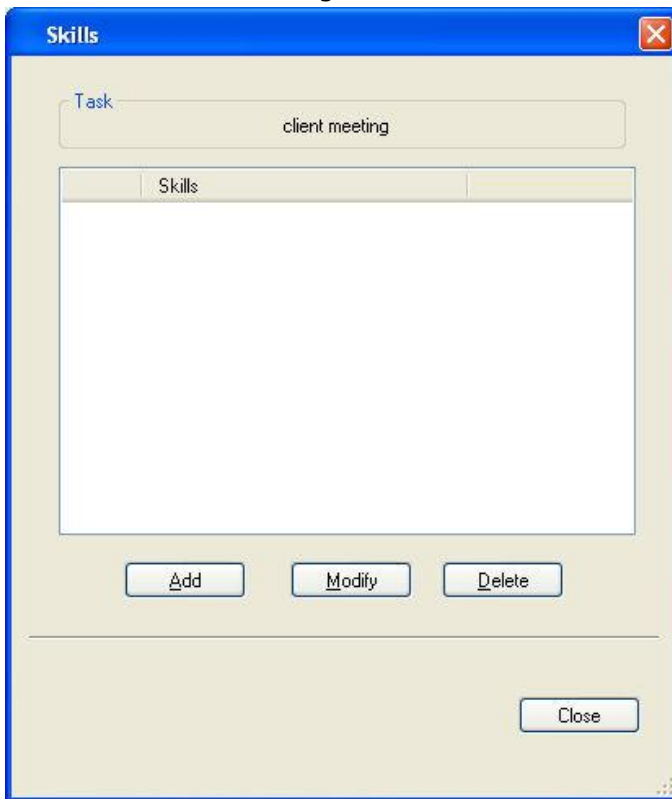


This resource now has the skill "Car licence".



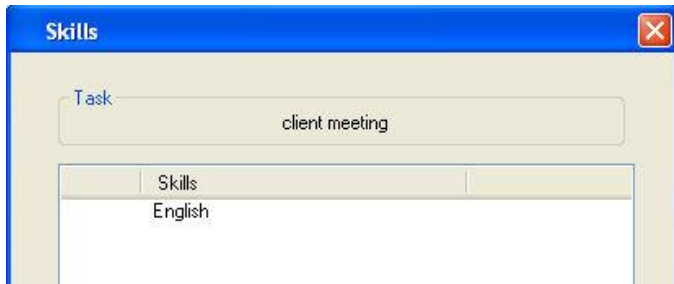
IV. How to affect skills to your tasks ?

From the menu "Data" -> "Task", select the task and assign skills clicking on the button "Skills" or double clicking on the task. The following window appears :



The skills assignment is the same as for resources. Clicking on the button "Add".

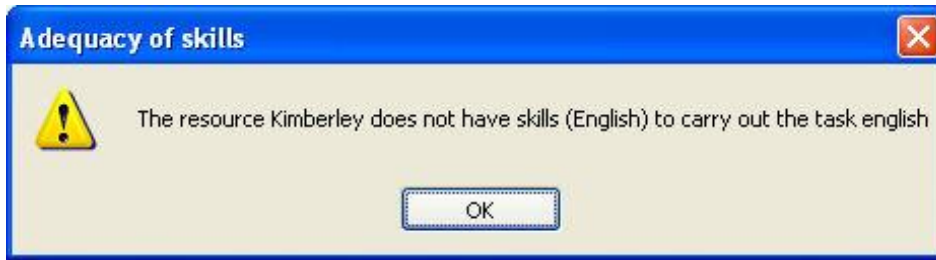
Result : In this example, we assigned the skill "English" to the task "English training".



V. Check for skills adequacy

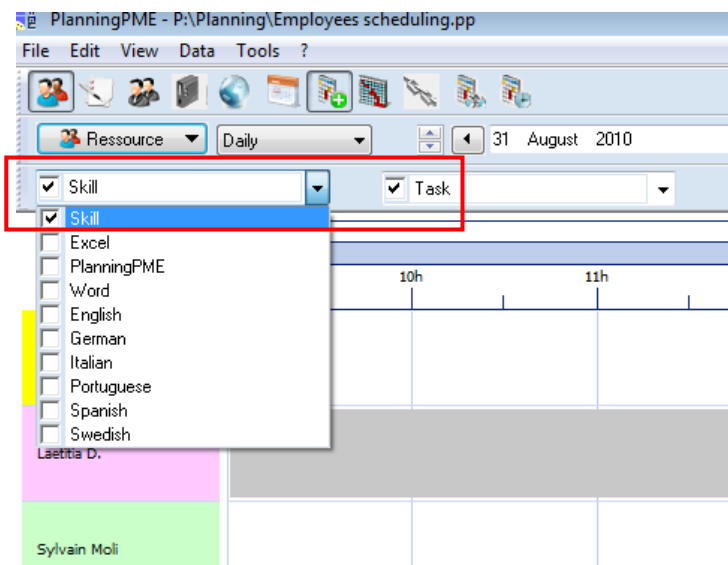
Once your skills assigned to your resources and tasks, the software will check the skills adequation between tasks and resources.

Example : Lest' try to assign the task "English training" to the resource "Paul" who has not got the skills required for this task. The software does not allow this action. The following error message appears:



VI. The filter Skill

To extract from the schedule skilled resources, you can play with the filter "Skill" at the top left side of your screen. See corresponding card.



VII. Search for skilled persons

You have the possibility to search on the whole schedule skilled resources to do a task on a precise date from the menu "Edit" -> "Availability".

See corresponding card:

http://www.planningpme.com/fiches/FC11-Search_for_availabilities_and_other.pdf

<http://www.planningpme.com>