



**akuiteo**  
BUSINESS SOFTWARE

General Guide

# AKUITEO PROJECT

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# 1 Preface

## 1.1 REVISIONS

<b>Revision 5</b>	Published in May 2022 <ul style="list-style-type: none"><li>• <b>Allow on...</b> fields now hidden if the PLG_HORODATE management rule is active (see <a href="#">Description of a scheduled item's form (p. 33)</a>).</li></ul>
<b>Revision 4</b>	Published in February 2022 <ul style="list-style-type: none"><li>• Details about the <a href="#">PLG_TACE management rule (p. 10)</a>'s calculation.</li></ul>
<b>Revision 3</b>	Published in December 2021 <ul style="list-style-type: none"><li>• Added PLG_LNK_CLB_AFF_TACH control for the partitioning by project and by employee (see <a href="#">Other management rules linked to Project (p. 12)</a>).</li><li>• Added DMF 250116 to automatically link an employee as a project's resource when creating a scheduled item (see <a href="#">Validating or canceling validation of scheduled items (p. 40)</a>).</li></ul>
<b>Revision 2</b>	Published in June 2021 <ul style="list-style-type: none"><li>• Updated sub-chapter <a href="#">Selecting scheduled items (p. 39)</a> with the cumulative duration of selected scheduled items.</li></ul>
<b>Revision 1</b>	Published in May 2021 First publication.

## 1.2 HELP DESK

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To share your feedback or contact the help desk, feel free to visit our website page:





<https://www.akuiteo.fr/akuiteo.clients/>

## 2 What is Project?

Project is an online portal designed for planners, to help them manage their teams' schedules. Without opening the Application Desktop, planners can:

- fill in employees' schedules, based on ongoing projects,
- monitor employees' estimated occupancy rate,
- schedule a project based on its deadlines,
- anticipate workload escalation within the year.

Project has four menus:

- The  **Schedule** menu, that helps schedule from a list of employees or projects, in a monthly, yearly or 4-month calendar.
- The  **Calendar** menu, that helps schedule employees in a weekly calendar, with a timestamped view. This menu is conditioned by the PLG\_HORODATE management rule.
- The  **Estimated workload** menu, that helps visualize the scheduled workload set up on the tasks of the projects displayed in a yearly calendar, to therefore prevent workload escalation within the year for schedules allocated to employees and generic resources. Scheduling cannot be accessed from this view.
- The  **Favorites** menu, that helps quickly access the favorites of the connected user. This menu contains all the favorites that can be quickly accessed from all Project's screens.

### Important

Project is compatible with the following browsers: Chrome, Safari, Firefox and Microsoft Edge Chromium.

## 3 Accessing Project

### 3.1 LOGGING IN

- 1 In a web browser, enter the following type of address to access Akuiteo's Launcher:  
*https://domainname/servername/apps/launcher/*.


#### Example

<https://www.akuiteo.com/akuiteo/apps/launcher/>

- 2 From the Launcher, click on **Project**.

#### Note

To access Project from the Launcher, the link to the application must have been configured from the Administration console.

- 3 In the login window, fill in the **Login** and the **Password**. If needed, click on  to show the password.
- 4 Click on **Log in**.  
↳ Project 's home page opens.

### 3.2 CHANGING THE LANGUAGE

To change the interface's language, click on the connected user's picture in the header then click on the flag for the desired language. The interface is automatically changed in the selected language.

### 3.3 CHANGING THE THEME

To change the color theme of the interface, click on the connected user's picture in the header, then click on the Dark or Light theme. The interface automatically displays the selected theme.

### 3.4 LOGGING IN AS A SECONDARY USER

If secondary users are linked to the account of the connected user, it is possible to log in to the Project portal as a secondary user.

- 1 Log into the portal as a main user.
- 2 Click on the connected user's picture in the header, then click on **Secondary users**.  
↳ A list containing the codes of the main and secondary users is displayed. The code of the connected user is shaded.

**3** Click on the code of the secondary user of your choice.

↳ Project is updated automatically and you are now connected with the account of the selected user. The favorites displayed and the filters and rights applied are those of the selected secondary user.

#### Note

If the main user account is not linked to any secondary users, the **Secondary users** option is not displayed.

## 3.5 LOGGING OUT

To log out from the portal, click on the connected user's picture in the header, then click on **Logout**.



# 4 Setting up Project

## 4.1 ACCESS RIGHTS

The following DMFs are required to use some features in the Project portal:

Code	Domain	Module	Position
25****	PROJECT	*	*
2501**	PROJECT	SCHEDULES	*
250101	PROJECT	SCHEDULES	VIEW
250102	PROJECT	SCHEDULES	NEW
250103	PROJECT	SCHEDULES	RESCHEDULE
250104	PROJECT	SCHEDULES	DISSOCIATE SCHEDULED ITEM
250105	PROJECT	SCHEDULES	REALLOCATE TO EMPLOYEE
250106	PROJECT	SCHEDULES	MODIFY UNDONE ALLOCATION
250107	PROJECT	SCHEDULES	MODIFY ALLOCATION'S DONE INDICATOR
250108	PROJECT	SCHEDULES	MODIFY DONE ALLOCATION
250109	PROJECT	SCHEDULES	MODIFIED LINKED ORDER
250110	PROJECT	SCHEDULES	DELETE UNVALIDATED SCHEDULE
250111	PROJECT	SCHEDULES	DELETE VALIDATED SCHEDULE
250112	PROJECT	SCHEDULES	PRINT
250113	PROJECT	SCHEDULES	SHOW LABELS FOR LEAVE PROJECTS
250114	PROJECT	SCHEDULES	VALIDATE
250115	PROJECT	SCHEDULES	PUBLISH
250116	PROJECT	SCHEDULES	LINK EMPLOYEE TO PROJECT / PROJECT TASK

## 4.2 MANAGEMENT RULES

The following management rules are applied on the Project's portal. These rules must be set up from the Application Desktop, in the setup menu **General Setup > Special parameters > Management rules**.

## 4.2.1 PLG\_TACE management rule

### Important

The **PLG\_TACE** management rule must be activated and set up, to show the **Scheduled rate** display option in the **Employee** view of the calendar.

The **PLG\_TACE** management rule enables you to establish calculation rules for employees' occupancy rate excluding holidays (Scheduled rate) in Project.

Calculating the scheduled rate is done as follows:

- *Scheduled hours of the employee / (Number of worked days of the employee - Total number of days scheduled for items validated on leave projects)*

<i>Scheduled hours of the employee</i>	<p>An employee's scheduled hours is the total sum of that employee's daily occupancy rates.</p> <p>By default, only internal and external projects are taken into account when calculating an employee's scheduled hours. However:</p> <ul style="list-style-type: none"><li>• The codes of the internal projects / phases / sub-phases filled in <b>Employee scheduled hours: Exclude the following internal projects / phases / sub-phases codes</b> are not taken into account when calculating an employee's scheduled hours. If the <i>*INTERNE*</i> code is indicated in this field, then all internal projects are excluded from the scheduled hours.</li><li>• The codes of the leave projects / phases / sub-phases filled in <b>Employees scheduled hours: Include the following leave projects / phases / sub-phases codes</b> are taken into account when calculating an employee's scheduled hours.</li></ul>
<i>Number of worked days of the employee</i>	<p>This number of worked days includes:</p> <ul style="list-style-type: none"><li>• national holidays in the employee company's calendar,</li><li>• the employee's standard week, only if the <b>Yes</b> option is checked for the <b>Employee worked days</b>,</li><li>• the number of working days in a month, only if the <b>No</b> option is checked for the <b>Employee worked days</b>.</li></ul> <div><p><b>Important</b></p><p>If <b>No</b> is checked for the <b>Employee worked days</b>, then you should exclude the employee's part-time projects from the <b>Employee leaves</b>.</p><p>If national holidays are generated by leave projects, then you should exclude these projects from the <b>Employee leaves</b>.</p></div>
<i>Total number of days scheduled for items validated on leave projects</i>	<p>Scheduled items validated on leave projects group together all leave projects.</p> <div><p><b>Note</b></p><p>The validation is only need for leave projects of the <b>Leaves with Request</b> type. To be considered when calculating an employee's worked days, leaves of this type must be validated. The other types of leaves do not need that validation.</p></div>

	<p>For the <b>Employee leaves</b> field:</p> <ul style="list-style-type: none"> <li>• If <b>Yes</b> is checked, then the codes of the projects / phases / sub-phases filled in the <b>Employee leaves</b> field are excluded from the projects taken into account.</li> <li>• If <b>No</b> is checked, only the codes of the projects / phases / sub-phases filled in the <b>Employee leaves</b> field are taken into account.</li> </ul>
--	---

## Example 1

Employee A works 5 days a week.

For a week, employee A's schedule will look as follows:

- 2 days scheduled on external projects
- 1 day scheduled on an internal project
- 1 day scheduled on a medical leave project
- 1 day scheduled on a paid leave project

Calculating the standard Scheduled rate	3 scheduled days / (5 worked days - 2 leave days) = 100%
If the internal project is excluded (code indicated in <b>Employee scheduled hours</b> )	2 scheduled days / (5 worked days - 2 leave days) = 66%
If the number of working days is taken into account (with <b>No</b> checked in <b>Employee worked days</b> )	3 scheduled days [+ 2 leave days included] / (5 worked days - (2 leave days [- 2 leave days excluded])) = 100%
If medical leave projects are excluded (with <b>Yes</b> checked and the code indicated in <b>Employee leaves</b> )	3 scheduled days / (5 worked days - (2 leave days [- 1 leave day excluded])) = 75%

## Example 2

Employee B works at 80% (4 days a week):

- If the **PLG\_TACE** rule takes into account standard weeks, the employee's working hours are divided over 4 days.
- If the **PLG\_TACE** rule takes into account working days, the employee has a day scheduled on a leave project ("part-time" for example) to manage his schedule.

For a week, employee B's schedule will look as follows:

- 1 day scheduled on an external project
- 1 day scheduled on an internal project
- 1 day scheduled on a medical leave project
- 1 day scheduled on a paid leave project
- *Example \**: an additional day scheduled on a part-time leave project

Calculating the standard Scheduled rate	2 scheduled days / (4 worked days - 2 leave days) = 100%
If the internal project is excluded (code indicated in <b>Employee scheduled hours</b> )	1 scheduled day / (4 worked days - 2 leave days) = 50%
If the number of working days is taken into account (with <b>No</b> checked in <b>Employee worked days</b> )	<i>Example *</i>

	2 scheduled days [+ 3 leave days included] / (5 worked days - (3 leave days [- 3 leave days excluded])) = 100%
If medical leave projects are excluded (with <b>Yes</b> checked and the code indicated in <b>Employee leaves</b> )	2 scheduled days / (4 worked days - (2 leave days [- 1 leave day excluded])) = 66%

## 4.2.2 Other management rules linked to Project

The following management rules are linked or specific to Project:

Rule or control	Description
<b>AFF_ABS_BLOQ</b>	Prohibits schedules entry on leave projects of the <b>Leaves with Request</b> type.
<b>AFF_ABSCAL_BLOQ</b>	Prohibits schedules entry on leave projects of the <b>Calendar absences</b> type.  <b>Note</b> The leave type is defined in the project sheet > <b>Additional information</b> tab > <b>Management data</b> section.
<b>PLG_AUTORISER_LES</b>	Automatically checks the <b>Allow on Saturdays/Sundays/national holidays</b> options when creating a scheduled item.
<b>PLG_CMDCLI</b>	Adds the <b>Order line</b> in a scheduled item's form (only in Project). This field indicates the customer order linked to the item.
<b>PLG_COMMENTAIRE</b>	Makes it mandatory to enter a comment in a scheduled item's form.
<b>PLG_DESCRIPTIF</b>	Adds the <b>Description</b> field in a scheduled item's form.
<b>PLG_HORODATE</b>	Makes it possible to enter timestamped schedules and access the <b>Calendar</b> menu.  <b>Important</b> This management rule affects the way schedules are filled in Project, as well as in the Web Portal and the Application Desktop.  Before activating this rule, contact your Akuiteo project manager.
<b>PLG_LNK_CLB_AFF_TACH</b>	Makes it possible to manage the partitioning by project and by employee: <ul style="list-style-type: none"><li>• When the control is disabled, the standard partitioning is applied and only the employees linked to a project can be allocated as resources in scheduled items.</li><li>• When the control is activated, a scheduled item can be linked to all employees of the company, as well as to multi-company employees.</li></ul> <b>Important</b> The PLG_LNK_CLB_AFF_TACH control only applies to the Project portal, and not the Desktop or the other web portals.
<b>PLG_MASQUER_ABS</b>	Hides leave projects' labels.

## 4.3 CUSTOMIZING THE COLOR OF SCHEDULED ITEMS


Default colors are used on scheduled items to visually differentiate between:

- internal projects,
- external projects,
- leave projects.

However, a user can customize these colors in the Application Desktop, if granted the needed access rights. Colors are set up by company. Therefore, the displayed color code is the one set up for the user's connection company.

### Note

You only need to set up one color per type of project. Additional colors will not be considered.

- 1 From the Application Desktop, open the setup menu **General Setup > Schedules and Timesheets > Scheduled item**.
- 2 Click on  in the action bar to create a color code and fill in the following fields:

Field	Description
Code	Identify the color using a unique code.
Rank #	Add a rank number to the color code.  This rank number is used only if several codes are set up for the same <b>Type</b> . In this case, the code with the smallest number is used.
Label	Enter the label of the color code.
Color	Click on the colored sticker to open the color chart. Choose the desired color or set your own customized color, then click on <b>OK</b> .  <div><b>Important</b>  Information displayed in schedule blocks is written in white. Make sure you use a dark color for your projects to be readable.</div>
Type	From the drop-down list, choose the type of project (internal / external / leave) to associate with the color code.

- 3 Click on .

↳ The color code is created. In Project, the set up color replaces the default color that was used for the scheduled items of the relevant type of project.

### Tip

This color code is displayed at the bottom of the Project's screen.

## 4.4 CUSTOMIZING THE INFORMATION DISPLAYED IN A SCHEDULE BLOCK

The **PLG\_ENTETE\_FICHE** management rule enables you to customize the information displayed in each schedule block, in the **Schedule** menu, as well as in the tooltip displayed when hovering over a block.

When this rule is activated, the information displayed is the one indicated in the rule. If the rule is not activated, only the information displayed by default is available.

Fill in the following parameters in the management rule:

Field	Description
<b>Information to display on a scheduled item (Project view)</b>	Enter the codes of the information you want to display in a schedule block, in <b>Project</b> view.  You can display up to 2 lines.
<b>Information to display when hovering over a scheduled item (Project view)</b>	Enter the codes of the information you want to display in a schedule's tooltip when hovering over a block, in <b>Project</b> view.  You can display up to 7 lines.
<b>Information to display on a scheduled item (Employee view)</b>	Enter the codes of the information you want to display in a schedule block, in <b>Employee</b> view.  You can display up to 2 lines.
<b>Information to display when hovering over a scheduled item (Employee view)</b>	Enter the codes of the information you want to display in a schedule's tooltip when hovering over a block, in <b>Employee</b> view.  You can display up to 7 lines.

The following codes can be used: CODE\_SOCIETE\_AFFAIRE, CODE\_CLIENT, NOM\_APPEL\_CLIENT, CODE\_AFFAIRE, NOM\_APPEL\_AFFAIRE, CODE\_COLLABORATEUR, NOM\_PRENOM\_COLLABORATEUR, CODE\_SOCIETE\_COLLABORATEUR, CODE\_ACTION, LIBELLE\_ACTION, LIBELLE\_TACHE, DUREE, ICONE\_PHOTO\_COLLAB, ICONE\_LOGO\_CLIENT, VISIO

### Notes

Concerning the DUREE code, if the duration of a scheduled item is less than 1 day, the period (morning or afternoon) is also displayed.

The ICONE\_PHOTO\_COLLAB and ICONE\_LOGO\_CLIENT codes enables you to display an employee's picture or a customer's logo, respectively. Only one icon can be added per field. Therefore, you cannot display the picture of an employee and a customer's logo in the same block or tooltip. The displayed icon maintains a fixed position no matter where you add the code in the syntax.

For the syntax:

- If you want to display the information on the same line, use the hyphen "-" to separate the codes.

### Example

You want to display the project's company and code on the same line. You enter the following code in the relevant field: CODE\_SOCIETE\_AFFAIRE-CODE\_AFFAIRE.

In Project, the information will be displayed as follows: Company1 - ProjectB

- If you want to display information on several lines, use the hash symbol "#" to separate the codes.

### Example

Following the first example, you want to add the employee's name on a new line. In the relevant field, you enter the following codes: CODE\_SOCIETE\_AFFAIRE-CODE\_AFFAIRE#NOM\_PRENOM\_COLLABORATEUR.

In Project, the information will be displayed as follows:

Company1 - ProjectB  
John Smith

## 4.5 PREFERENCES

To access the preferences, click on the connected user's picture in the header, then click on **Preferences**. To set up a preference, check/uncheck a box or enter a value, then click on **Save**.

### Schedule

Preference	Description
<b>Displaying tasks to be scheduled</b>	Check this preference to automatically display the tasks to be scheduled pane.  When this box is not checked, tasks to be scheduled are hidden by default.
<b>Employee view by default</b>	Check this preference if you want the <b>Employee</b> view to be displayed when opening the <b>Schedule</b> menu.  When this box is not checked, the <b>Project</b> view is displayed by default.
<b>Show weekends</b>	Check this preference to automatically activate the <b>Weekends</b> display option and display weekends in the calendar.  When this box is not checked, the option is deactivated and weekends are hidden by default.
<b>Expand</b>	Check this preference to automatically activate the <b>Expanded</b> display option and expand all scheduled items.  When this box is not checked, the option is deactivated and scheduled items are collapsed by default.




## Calendar

Preference	Description
<b>Show employees to be scheduled</b>	<p>Check this preference to automatically display the <b>Employee list</b>.</p> <p>When this box is not checked, the employee list is hidden by default.</p>
<b>Start time</b>	<p>Enter a start time to set the working hours to be displayed in the calendar. The start time you enter determines the first hour displayed in the calendar; preceding hours are hidden. The hours preceding the start time remain accessible.</p> <div><b>Example</b> If you enter 11:00 AM as the start time, 11:00 AM is displayed as the first line in the calendar and the preceding lines are hidden.</div>
<b>End time</b>	<p>Enter an end time to set the working hours to be displayed in the calendar. The end time you enter determines the last hour displayed in the calendar; following hours are hidden. The hours following the end time remain accessible.</p> <div><b>Example</b> If you enter 7:00 PM as the end time, 7:00 PM is displayed as the last line in the calendar and lines that follow are hidden.</div>



# 5 Browsing into Project

Project enables access to employees schedules in a yearly, monthly or weekly calendar:

- The  **Schedule** menu displays a monthly, yearly or 4-month calendar. This menu has two views: the **Project** view, that displays all scheduled projects and the **Employee** view, that displays employee schedules.
- The  **Calendar** menu displays a weekly calendar and helps organize employee schedules in a timestamped view.
- The  **Estimated Workload** menu gives a yearly view of the workload per project, to prevent workload escalation within the year.

## Important

User partitioning is applied on the Project portal. When a user is limited to one or more companies, divisions, entities, projects or customers, the projects and employees displayed will be filtered accordingly.

Each scheduled item displayed in the calendar appears in a block. Schedules can be displayed in three ways:

- Through filters applied to projects, resources and scheduled items, in order to target all schedules displayed in the calendar. No scheduled item is displayed by default when accessing a view without selecting a filter. Filters should always be applied in order to display the relevant scheduled items.
- Through display options, that help differentiate between targeted scheduled items, by adding indicators or displaying / hiding some information.
- Through categorizing options accessible from the **Schedule** and **Estimated workload** menus, that help filter the list of displayed resources.

The filters, display options and categories are saved as the user switches from a view to another, even if the displayed timeline differs. As such, the user maintains the same display options and context. However, display options that are not available in a view may not be saved.

## Example

From the **Schedule** menu, the **Scheduled rate** will be displayed in any monthly or yearly calendar when the user is in **Employee** view. However, due to incompatibilities, that option will not be displayed in the 4-month view when the user displays the **Calendar** menu in Project view.

The timeline displayed on the calendar is also saved. Once selected, the timeline remains unchanged even if the user changes the menu, the view, filters, or even if a favorite is applied.

## 5.1 WHAT ARE THE DISPLAYED RESOURCES?

What are the projects displayed in **Project** view or in the **Estimated workload** menu?

When the user is in **Project** view or in the **Estimated workload** menu, ongoing projects are displayed based on the selected timeline (and applied filters).

An ongoing project is a project with a state code for which the **Schedule** option is checked (**General setup > Project > Project status code**).

The setup for the **Schedule** line in **General setup > Project > Locking of project, phases and sub-phases** is also taken into account:

- The project will not be displayed if the **Operational start date** option is checked and the production is scheduled to end before the displayed timeline
- The project will not be displayed if the **Operational end date** option is checked and the production is scheduled to end before the displayed timeline
- The project will not be displayed if the **Administrative closure** option is checked and the project is already closed

A project will be displayed in **Project** view if its start date falls within the selected month. In this case, days preceding the project's start date are shaded. Similarly, a project will be displayed if its end date falls within the month displayed in the calendar. In this case, the days following the project's end date are shaded.

The project time spans are also displayed in the **Estimated workload** menu. The months preceding the project's start date and coming after the end date are shaded.

Who are the employees displayed in **Employee** view or in the **Calendar** menu?

When the user is in **Employee** view or in the **Calendar** menu, a list of active employees will be displayed based on the selected timeline (and applied filters).

An employee will not be displayed if:

- the arrival date in the company comes after the displayed timeline,
- the exit date from the company comes before the displayed timeline.

In the resource list, the **Multi-compagny assignment** label is added below the name of an employee assigned to several companies. As such, the planner can see all the scheduled tasks of a multi-companies employee (depending on how user partitioning was done).



How are private projects managed?

If scheduled items are linked to private projects or to projects the planner cannot access:

- The said items will not be displayed in **Project** view or in the **Estimated workload** menu.
- The said items will be displayed in **Employee** view or in the **Calendar** menu, but with no detailed information. The item and its duration will be displayed, but with no details on the project to which the item is linked. No action can be carried out.

## 5.2 BROWSING INTO THE **SCHEDULE** MENU

The **Schedule** menu helps the planner create scheduled items in a monthly, yearly or 4-month view. The **Schedule** menu can be accessed:

- by clicking on the  **Schedule** menu on the left side of the screen, to access the home page without any filters applied,
- from the  **Favorites** menu on the left side of the screen, by clicking on a favorite that was saved from the **Schedule**.

Two view modes are available from the **Schedule** menu:

- The **Project** view, that displays the list of ongoing projects and associated schedules.
- The **Employee** view, that displays the list of active employees and their schedules.

Click on the **Project** or **Employee** view up at the top right of the Project screen, depending on your needs. The lines displayed in the calendar and the available display options will vary depending on the selected view.



### 5.2.1 Choosing the timeline

#### Note

The displayed timeline is saved when the user changes the view, the filters, etc.

Regardless of the selected view, the displayed timeline can be:

- A monthly view, to display all the days (grouped per weeks) of the selected month. Click on **TIMELINE MONTH** at the top right of the calendar, to access the monthly view.
- A yearly view, to display all the months of the selected year. Click on **TIMELINE YEAR** at the top right of the calendar, to access the yearly view.
- A 4-month view, to display a global view of an employee / a project's schedule over a period of 4 months. To access this view, right-click on an employee or project in the first column of the calendar and select **Open 4-month view**.

Click on  and  in the calendar's header, to move from one month or year to the other. You can also click on the timeline displayed on the calendar's header (in **red**), to display a calendar and choose a timeline. When the user is in 4-month view, the selected month marks the beginning of the timeline.

### 5.2.2 Accessing a project's detailed view

In **Project** view, click on a project in the first column of the calendar to have a detailed view of that project.

#### Note

In **Employee** view, this detailed view represents the use of a Project-related filter, with the corresponding project only.

This detailed view shows all active employees on the selected timeline, that have at least one scheduled item linked to this project. All the scheduled items of the employees are displayed, but only the schedules linked to the project are highlighted; the other schedules are shaded to help the user visually differentiate them.

In a project's detailed view, the tasks to be scheduled only display the tasks linked to the selected project.

### 5.2.3 Accessing an employee's detailed view

In **Employee** view, click on an employee in the first column of the calendar to access the monthly detailed view of that employee.

#### Note

In **Project** view, this detailed view represents the use of an Employee-related filter, with the corresponding employee only.

This detailed view shows all the projects that are linked to scheduled items allocated to the selected employee, and for which the selected timeline is included in the current timeline of the project. All the scheduled items of the projects are displayed. However, schedules allocated to the employee are highlighted and those allocated to other employees are shaded to help visually differentiate them.




In an employee's detailed view, the tasks to be scheduled only display the ongoing tasks for the displayed projects.

## 5.3 BROWSING THROUGH THE **CALENDAR** MENU

#### Important

The **PLG\_HORODATE** management rule must be activated from the Application Desktop to display the **Calendar** menu.


The **Calendar** menu helps the planner schedule with more precise time slots in a weekly calendar. The **Calendar** menu can be accessed:

- by clicking on the  **Calendar** menu on the left side of the screen, to access the home page without any filters applied,
- from the  **Favorites** menu on the left side of the screen, by clicking on a favorite that was saved from the **Calendar**,
- from the  **Schedule** menu in **Employee** view only, by right-clicking on a resource and selecting **Open calendar**. The relevant employee will be automatically selected as a filter.

### 5.3.1 Choosing the timeline

#### Note

The displayed timeline is saved when the user changes the menu, the filters, etc.

Click on  and  in the calendar's header to move from one week to the other. You can also click on the displayed week in the calendar's header (in **red**), to display a calendar of weeks (grouped per month) and choose a specific week.

### 5.3.2 Managing the employee list

The **Calendar** menu displays the weekly calendar of the employees selected in the **Employee list**. The employees available in this list depend on the applied filters, the same way as for the list of employees in the **Employee** view of the **Schedule** menu.




To display the list of employees, activate the **Employee list** pane at the top right of the **Calendar** menu. From this list:

- select an employee to display the associated scheduled items,
- unselect an employee to hide the associated scheduled items.

By default, the first 10 employees that correspond to the filters applied are checked. You can select or unselect up to 30 employees, making sure the schedule remains readable.

Specific colors are randomly assigned to employees in order to differentiate them. Once assigned to an employee, the color remains unchanged. This color is used both in employees' checkboxes in the **Employee list** and for the colored schedule blocks. Therefore, the various colors assigned help differentiate between employees' schedules.

From the **Employee list**:

- Search for one or more employees by entering the first three letters of their name in the search field . The list automatically displays the relevant employees.
- Select or unselect up to 30 employees in the displayed list.
- Click on  or  to sort the list in alphabetical order or the reverse. The sorting is applied on the employee's last name.

### 5.3.3 Managing the timestamped calendar

Time slots are displayed in the **Calendar** based on:

- The time preferences set by each user. The start and the end time for the calendar display are defined by user preferences. The time slots preceding the start time or following the end time are not displayed in the calendar. If the user does not set preferences, the start time of the calendar will correspond to the earliest start time of the displayed employees' standard weeks.

#### Reference

For more information about preferences, refer to [Preferences \(p. 15\)](#).




- The employees' standard week. The time slots preceding the start time and following the end time set within the standard week are shaded. If the employees displayed in the calendar have different standard weeks, the earliest start time and the latest end time will be taken into account. Time slots are shaded for informational purposes only; schedules can therefore be added on a shaded slot.

Scheduled items set for a full day or for several days are displayed in the **Calendar**'s header, on the relevant day(s).

Schedule blocks of several hours (for items that are not scheduled for a full day) are displayed in the **Calendar** at the relevant time slots.

## 5.4 BROWSING THROUGH THE **ESTIMATED WORKLOAD** MENU



The **Estimated workload** menu provides access to a workload schedule, with the same filters applied than in the **Project** view of the **Schedule** menu. This menu helps visualize scheduled tasks in a yearly calendar, to prevent workload escalation within the year. The **Estimated workload** menu can be accessed:

- by clicking on the  **Estimated workload** menu on the left side of the screen, to access the home page without any filters applied,
- from the  **Favorites** menu on the left side of the screen, by clicking on a favorite that was saved from the **Estimated workload** menu.
- from the  **Schedule** menu in **Project** view only, by right-clicking on a resource and choosing **Open estimated workload**. As such, the relevant project is automatically selected in the filters.

### 5.4.1 Choosing the timeline

#### Note

The displayed timeline is saved when the user changes the menu, the filters, etc.

Click on  and  in the calendar's header to switch from a year to another. You can also click on the year displayed in the calendar's header (in **red**) to display a calendar of years and choose a specific year.

### 5.4.2 Managing schedules workload

By default, the **Estimated workload** menu is categorized as Project / Phase / Sub-phase / Task. This categorization can be modified, for example to delete a categorization level that is not used.

All the projects resulting from applied filters are displayed as resources in the first column of the calendar. Information about each task load is displayed below the task's label, in the first column of the calendar. This is a yearly calendar where all the months of the selected year are displayed.

Each task with a load has a monthly scheduled item. This item is only displayed in the calendar if there is at least one scheduled item for this task on the relevant month. The total duration (in days) of the relevant schedules is displayed on the monthly scheduled item. Hover over the item to display further information about the scheduled tasks: date, duration and allocated employee.

### Example

In February, 2 days are scheduled for the *Software evolutions* task on the *Customer A – SaaS / evolutions* project.

From the **Estimated workload** menu, a scheduled item linked to this task is displayed for the month of February. This item shows a duration of 2 days. By hovering over that item, the number of days scheduled for this month is displayed as well as the allocated employees.

The scheduled items allocated to generic resources have a specific color, to differentiate scheduled tasks from tasks to be scheduled.

Click on a monthly block to open the relevant project in 4-month view and schedule items on that month and the 3 following months.

## 5.5 FILTERING SCHEDULED ITEMS

To display scheduled items in the **Schedule**, **Calendar** and **Estimated workload** menus, you have to use filters: if no filter is selected, no scheduled item is displayed.

There are two types of filters:

- **Full filters:** scheduled items that do not match a full filter are displayed in the calendar but shaded; a color border helps identify the type of item.
- **Resource filters:** resources that do not match a resource filter are not displayed; both the employees or the projects are hidden.

The values available for the following filters depend on the type of partitioning applied to the planner: company, division, entity, project, customer.

The type of filters available vary depending on the context:

- From the **Employee** view in the **Schedule** menu and from the **Calendar** menu, filters help filter the way employees and their scheduled tasks are displayed.
- From the **Project** view in the **Schedule** menu and from the **Estimated workload** menu, filters help filter the way projects and associated tasks are displayed.


Filters are combined with a logical AND. However, if you enter several values for the same filter, these filters are combined with a logical OR.

### Example

In **Project** view, you enter two Employee-related filters, with John Smith and Mary Carter as values, and a Customer-related filter with Customer A as the value.

The calendar will therefore display all the projects linked to Customer A and the tasks scheduled *either* for John Smith *or* for Mary Carter.

To apply those filters:

- 1 Click on  in the filters area, at the top of the Project screen, and select the type of filter you want to apply.

↳ The type of filter is selected. The filter's icon is displayed on the left of the filters area and the name of the filter field shows **Filter by Type of filter**.

- 2 Enter at least three letters in the filter's field, to open the list of values relevant to your search, then select the filter you want to apply.

#### Tip

Press F2 in the filter's field to directly open the list of all the values available for the selected filter.

↳ The selected value is applied as a filter and the calendar is automatically updated.

- 3 Repeat this action for as many filters as needed.

#### Note

When using the Additional skills filter, the various levels of additional skills are displayed in brackets.

## 5.6 MANAGING HOW SCHEDULED ITEMS ARE DISPLAYED

The calendar of the different menus displays ongoing scheduled items that match the filters applied and the timeline selected.

An ongoing scheduled item is an item linked with:

- a phase with a state code where the **Schedule** option is checked (**General setup > Project > Phases status code**)
- a sub-phase with a state code where the **Schedule** option is checked (**General setup > Project > Sub-phases status code**)

From the **Schedule** menu, each scheduled item is represented by a colored block in the calendar. The color varies depending on the project in order to differentiate between external, internal and leave projects. The caption associated with the color code is displayed at the bottom of the calendar. If the display option **Quotation schedules** is activated, schedules generated from a customer quotation are displayed in a white background.

#### Reference

For more information on how to customize colors assigned to scheduled items, refer to [Customizing the color of scheduled items \(p. 13\)](#).

Each block displays specific information. To show further information, hover over a schedule block to display more details in a tooltip. You can also click on a schedule block to open a form, on the right of the screen, with comprehensive information on the scheduled item.



## Reference

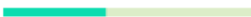


The information displayed by default can be customized. For more information, refer to [Customizing the information displayed in a schedule block \(p. 14\)](#).



### 5.6.1 Using display options

Display options are used to highlight some scheduled items or modify the way items are displayed in the calendar. These options are found above the calendar.

Click on an option to activate or disable it. Disabled options are shaded.

Display options of the **Schedule** menu

Display option	Description
<b>Validated items</b>	When this option is activated, validated scheduled items are displayed as shaded and transparent, to highlight the scheduled items that are not yet validated.
<b>Done items</b>	When this option is activated, scheduled items which have already been done are displayed with the ✓ icon added at the top left of the schedule block.
<b>Scheduled rate</b> (in <b>Employee</b> view only and not available in the 4-month view)	<div><b>Important</b> To show the <b>Scheduled rate</b> display option, the <b>PLG_TACE</b> management rule must be activated and set up.</div> <div><b>Reference</b> For more information on the <b>PLG_TACE</b> management rule, refer to <a href="#">Management rules (p. 9)</a>.</div> <p>When this option is activated, the scheduled rate excluding holidays is displayed (in percentage) in the first column of the calendar, below the name of each employee.</p> <p>The calculation rules of the scheduled rate are set up in the management rule. For the timeline, the calculation is based on the 1st day of the month until the last one.</p> <p>The following color code is used:</p> <p> <b>41 %</b> when an employee scheduled rate stands below 100%, meaning the employee still has empty time slots.</p> <p> <b>100 %</b> when the employee has been scheduled for the entire displayed timeline.</p> <p> <b>110 %</b> when the employee scheduled rate exceeds 100%, meaning the employee is over-scheduled.</p> <p>Hover over the scheduled rate indicator to display, in a tooltip, the number of scheduled days, validated leaves and worked days used to calculate the scheduled rate.</p>

Display option	Description
<b>Quotation schedules</b>	<p>When this option is activated, scheduled items generated from customer quotations are displayed in the calendar. Quotation schedules are displayed in a white background and their color code differs from the one used for schedules.</p> <p>When a quotation becomes an invoice, all the schedules linked to it are now considered as standard scheduled items.</p> <div> <p><b>Note</b></p> <p>Until they are validated, quotation schedules are not taken into account when calculating an employee's workload, occupancy and scheduled rates.</p> </div>
<b>Under/Over-scheduled days</b>	<p>When this option is activated, an icon appears at the bottom right of the box allocated to a day, to display:</p> <ul style="list-style-type: none"> <li>under-scheduled days, with the icon ;</li> <li>over-scheduled days, with the icon .</li> </ul> <p>This icon is displayed on days that have scheduled items (validated or not, done or not) which duration does not cover a full day.</p>
<b>Expanded</b>	<p>When this option is activated, all the schedule blocks of a day are displayed. As a result, the line height will vary depending on the number of items scheduled for a day.</p> <p>When this option is disabled, only one schedule block is displayed if several items are scheduled for the same day:</p> <ul style="list-style-type: none"> <li>either the main item (that is the item with the longest duration),</li> <li>or the item that was recently created when all scheduled items have the same duration.</li> </ul> <p>Additional items are displayed in a <b>+X</b> format. Click on <b>+X</b> to open a pop-up window that will display all the scheduled items for the selected day.</p>
<b>Weekends</b>	<p>When this option is activated, the days of the weekend are displayed in the calendar.</p> <p>When this option is disabled, the calendar runs from Monday to Friday.</p>

## Display options in the **Calendar** menu

Display option	Description
<b>Validated items</b>	When this option is activated, validated scheduled items are displayed as shaded and transparent, to highlight the scheduled items that are not yet validated.
<b>Weekends</b>	<p>When this option is activated, the days of the weekend are displayed in the calendar.</p> <p>When this option is disabled, the calendar runs from Monday to Friday.</p>

## 5.6.2 Adding a project to the calendar

It is possible to add a project to the list of projects displayed in the calendar, when you are in **Project** view in the **Schedule** menu, or from the **Estimated workload** menu. It can be:

- a project that does not correspond to applied filters,
- from an employee's detailed view, a project that does not have a scheduled item allocated to this employee.

- 1 Click on **Add project** at the bottom left of the calendar.
- 2 In the **Project** field, enter the code or the name of the desired project, or open the drop-down list to display all available projects.
- 3 Choose a project and click on **Validate**.

↳ The selected project is added to the calendar, including all its scheduled items.

You can therefore add scheduled items to a specific project or, from an employee's detailed view, allocate scheduled items to a project which is not linked to that employee.

### Note

Added projects will not be saved if you refresh the page. Allocate an employee to the added project if you want it to be displayed in that employee's detailed view the next time you access it.

## 5.6.3 Adding an employee to the calendar

It is possible to add an employee to the list of employees displayed in the calendar, when you are in **Employee** view in the **Schedule** menu, or from the **Calendar** menu. It can be:

- an employee that does not correspond to applied filters,
- from a project's detailed view, an employee who does not have a scheduled item on that project.

- 1 Click on **Add employee** at the bottom left of the calendar.
- 2 In the **Employee** field, enter the code or the name of the desired employee, or open the drop-down list to display the list of all available employees.
- 3 Choose an employee and click on **Validate**.

↳ The selected employee is added to the calendar, including all his/her scheduled items.

You can therefore add scheduled items to a specific employee or, from a project's detailed view, allocate scheduled items to an employee who was not already associated with that project.

### Note

Added employees will not be saved if you refresh the page. Allocate a task to the added employee if you want that employee to be displayed in the selected project's detailed view the next time you access it.

## 5.7 CATEGORIZING SCHEDULED ITEMS

Categorizing helps organize and filter projects per categories in **Project** view, or employees in **Employees** view.

The levels of categorization available are limited to a maximum of 4 and they vary depending on the selected category. If you choose **Employee** in **Category 1**, then only one level of categorization will be available. However, you can also categorize by selecting **Main skill > Service > Manager > Category 1**, and you will have 4 levels of categorization.

The categories available vary depending on the menus:

- From **Project** view in the **Schedule** menu and from the **Estimated workload** menu, categories have common items such as the company or the entity, and items specific to projects (customer, project category, etc.).
- From **Employee** view in the **Schedule** menu and from the **Calendar** menu, categories display common items and items specific to employees (manager, service, etc.).

- 1 Click on **CATEGORY** in the calendar's header.
- 2 Choose **Category 1** from the drop-down list.
- 3 Depending on the category that was previously selected, enter **Category 2**, **Category 3** and **Category 4**.
- 4 Click on **Validate**.

↳ The items displayed on the first column of the calendar are grouped based on selected categories, and categories are sorted in alphabetical order.

### Examples

From the **Project** view, if you choose the **Customer** category, projects will be grouped per customer (sorted in alphabetical order) as follows: Customer A and its projects > Customer B and its projects > etc.

From the **Employee** view, if you choose the **Service** then **Manager** categories:

- Employees will be grouped per service (sorted in alphabetical order) as follows: Sales and the employees of that service > R&D and the employees of that service > Help Desk > etc.
- The employees of each service are grouped per manager (sorted in alphabetical order). In the R&D Service: Manager A and his/her employees > Manager B and his/her employees > etc.

# 6 Managing scheduled items

Project enables the planner to enter scheduled items (in a calendar) in order to have a global view of tasks scheduled on each project, and check employees' workload. When planning a specific project, the scheduled item indicates the time that the employee allocated to the schedule will need to perform the said task.

The planner can undertake all necessary actions from the Project's portal: create new scheduled items or create items from tasks to be scheduled, modify in few clicks all information related to those items in case of any changes, export schedules or edit them in a different format, or delete some items.

The planner can manage each scheduled item individually, or select several items to schedule group actions.

## Important

Scheduled items can be managed from the **Schedule** and **Calendar** menus only. They cannot be managed from the **Estimated workload** menu.

Each scheduled item is displayed as a block in the Project's calendar. Scheduled items are displayed in the calendar based on the selected view and timeline, but mostly on the filters applied and the display options activated.

## Reference

For more information about the calendar, refer to [Browsing into Project \(p. 17\)](#).

## 6.1 CREATING A SCHEDULED ITEM

A scheduled item can be created:

- [From an empty scheduled item \(p. 30\)](#) ;
- [From tasks to be scheduled \(p. 31\)](#), to retrieve the information entered on a project and schedule a task;
- [By duplicating an already existing scheduled item \(p. 31\)](#).

## Notes

Before creating a new scheduled item, you must choose the view, the timeline and the filters to apply. For more information, refer to [Browsing into Project \(p. 17\)](#).

When creating a scheduled item, the time slots are retrieved from the employee's standard week. If the schedule is created on a day that is not worked in the standard week, the time slots from the following worked day will be used.

## 6.1.1 From an empty scheduled item

- 1 From the **Schedule** menu, right-click on a day in the calendar to select the line linked to the project or the employee of your choice. To create a scheduled item for a resource on the current day, right-click directly on the desired resource in the first column of the calendar.

From the **Calendar** menu, right-click on the desired time and day in the calendar.

- 2 Click on **Create**.

↳ The scheduled item's creation form opens on the right side of the screen.

### Tip

Click on the day of your choice and press **CTRL + I** to open the form.

- 3 From the form's list, select the task you want to associate with that schedule. Depending on how the item was created, the list displays as follows: customer(s), project(s), phase(s) and sub-phase(s).
  - If the item was created from the **Project** view in the **Schedule** menu, the list only displays the selected project, its phases and sub-phases.
  - If you create the item from the **Employee** view in the **Schedule** menu or from the **Calendar** menu, the list displays all the customers, projects, etc. that are available. In this case, in the search field, enter the first three letters of the name or code of the customer, project, phase or sub-phase you are looking for, to filter the results to display.

### Note

The projects, phases, sub-phases and tasks available to the planner depend on the level of partitioning that was applied. If the planner is limited to one or more companies, divisions, entities, projects or customers, the available assignments will be filtered accordingly.

↳ Information about the selected assignment is entered in the relevant fields in the creation form.

- 4 Fill in the required fields to create the scheduled item. Depending on how the item was created, some fields can be pre-filled (with the date or the name of the employee, for example).

### Reference

For more information about the fields of a scheduled item, refer to [Description of a scheduled item's form](#) (p. 33).

- 5 Click on **Save**.

↳ The scheduled item is created and directly displayed in the calendar.

## 6.1.2 From tasks to be scheduled



Activate the **Tasks to be scheduled** option — at the top right of the **Schedule** and **Calendar** menus — to display the tasks to be scheduled pane based on the selected view, timeline and filters.

This task pane displays all the tasks in progress which duration to be scheduled is greater than 0.

### Reference


For more information about the tasks to be scheduled, refer to [Managing tasks to be scheduled](#) (p. 44).

A task to be scheduled can be directly added to the schedule to create a new scheduled item bearing the same information as the task to be scheduled.

- 1 Select the task to be scheduled in the tasks to be scheduled pane. Select the view you want to display in the calendar.
- 2 From the pane, click on , on the left side of the task to be scheduled, then drag and drop the task into the desired spot in the calendar.  
 The creation form of the scheduled item opens on the right side of the screen, automatically displaying all the information entered when creating the task to be scheduled.
- 3 Fill in the required fields to create the scheduled item.

### Reference

For more information about the fields of a scheduled item, refer to [Description of a scheduled item's form](#) (p. 33).

- 4 Click on **Save**.  
 The scheduled item is created and directly displayed in the calendar.

## 6.1.3 By duplicating an already existing scheduled item

### Important

Days not worked are not taken into account during the duplication. An item can be duplicated on a national holiday, for example.

A new scheduled item can be quickly created by duplicating an already existing scheduled item.

- 1 From the **Schedule** and **Calendar** menus, right-click on a scheduled item in the calendar, then click on **Duplicate**. To duplicate several items, select them all and right-click on the selection. Then, click on **Duplicate all**.
- 2 In the duplication window, fill in the following fields:

Field	Description
Duplicate... <b>At a specific date</b>	<p>Select <b>At a specific date</b> to duplicate the scheduled item at a specific <b>Date</b>.</p> <p>If you have selected several items, you can choose:</p> <ul style="list-style-type: none"> <li>• <b>All items on</b>, to duplicate all the selected items on the same day, specified in the <b>Date</b> field.</li> <li>• <b>First item starting on</b>, to duplicate the first item (in chronological order) of the selection at the specified <b>Date</b>. The other items will be duplicated identically to the selection.</li> </ul> <div> <p><b>Example</b></p> <p>You have selected 2 scheduled items, one scheduled on a Monday and the other one scheduled on a Wednesday. You duplicate these items by selecting the following options: <b>At a specific date</b> and <b>First item starting on</b>. In the <b>Date</b> field, you enter Tuesday the 27th. The first scheduled item will be duplicated on Tuesday the 27th and the second one on Thursday the 29th.</p> </div>
Duplicate... <b>With a recurrence</b>	<p>Select <b>With a recurrence</b> if you want the duplicated scheduled item to be repeated based on a recurrence (year, quarter, month, week or day) and the number of times set up by the user.</p> <p>To do so, enter the <b>Number of repetitions</b> and choose the type of recurrence in the drop-down list of the <b>Type of recurrence</b> field.</p> <div> <p><b>Example</b></p> <p>You duplicate an item scheduled on October 5, 2020. You choose <b>With a recurrence</b> and enter 2 and <i>Year(s)</i> in the <b>Number of repetitions</b> and <b>Type of recurrence</b> fields, respectively. The scheduled item is therefore duplicated on October 5, 2021 and October 5, 2022.</p> </div> <p>If you have selected several items on several different days, then the range between the selected items will be kept during the duplication.</p>
Duplicate... <b>With a range of recurrence</b>	<p>Select <b>With a range of recurrence</b> if you want the duplicated scheduled item to be repeated based on a range of recurrence until a given date, or based on a number of repetitions set up by the user.</p> <p>To do so, fill in the following fields:</p> <ul style="list-style-type: none"> <li>• <b>Number of occurrences</b> - Enter the number of occurrences.</li> <li>• <b>Type of recurrence</b> - Choose the type of recurrence in the drop-down list.</li> <li>• <b>Until</b> - Choose the end date after which the duplication has to stop.</li> <li>• <b>Or... times</b> - Instead of entering an end date, you can set a number of repetitions.</li> </ul>



Field	Description
	<p><b>Example</b></p> <p>You duplicate an item scheduled on October 5, 2020. When duplicating, you select <b>With a range of recurrence</b>. You enter 2 as the number of occurrences and choose <i>Day(s)</i> as the type of recurrence, until Monday, October 26 (3 weeks later). The scheduled item is therefore duplicated every two days until Monday, October 26.</p> <p>However, if instead of entering Monday, October 26 as the date, you enter 10 in the <b>Or... times</b> field, the scheduled item is therefore duplicated every two days, 10 times.</p> <p>If you have selected several items on several different days, then the range between the selected items will be kept during the duplication.</p>
<b>Item status</b>	<p>Select:</p> <ul style="list-style-type: none"> <li>• <b>Keep status</b>, if you want to keep the validated or not validated status of original items during the duplication.</li> <li>• <b>Validated</b>, to apply the validated status to all the duplicated items (<b>Validated</b> box checked).</li> <li>• <b>Not validated</b>, to apply the not validated status to all the duplicated items (<b>Validated</b> box not checked).</li> </ul>
<b>Select one or more employees</b>	<p>Enter at least three letters of the code or name of an employee to display the list of relevant employees, then select the employee of your choice. You can add as many employees as you want. The duplicated items will be therefore allocated to the selected employee(s).</p>

### 3 Click on **Duplicate**.

↳ The selected scheduled items are duplicated and directly displayed in the calendar. Both the duplicated and the original items share the same information, except for the start date, the employee and the validated status.

#### Tip

To quickly duplicate items, use the shortcuts *CTRL + C*, to copy a scheduled item and *CTRL + V*, to paste it in the spot of your choice. If you have selected several items, then the range between those items will be kept during the duplication (taking into account working days).

## 6.2 DESCRIPTION OF A SCHEDULED ITEM'S FORM

A scheduled item's form contains all information needed to schedule a task in a project, manage its duration and its assignment.

Click on a scheduled item in the calendar to display its detailed form.

#### Tip

Click on the form's header, then drag and drop the form to move it to another position, if you want to see the tasks to be scheduled pane at the same time for example.

The form is divided into two parts:

- the first part provides [Information about a scheduled item \(p. 34\)](#)
- the second part provides [Information about the task \(p. 38\)](#).

## 6.2.1 Information about a scheduled item

Field	Description
<b>Start date / End date</b>	<p>The start date and time of the scheduled item.</p> <p>If the PLG_HORODATE management rule is activated and you are using the timestamped calendar, the <b>End date</b> field is also displayed. In this case, enter the scheduled item's end date and time.</p> <p>If you instead schedule using a start and end time, then the actual time between the start date and time and the end date and time will be counted.</p>
<b>Duration</b>	<div> <div>Note</div> <p>If the PLG_HORODATE management rule is activated, then this field is for informational purposes only and cannot be modified.</p> </div> <p>The duration in days of the scheduled item. You can enter the duration using 2 decimals (for example, 1/4 day = 0.25).</p> <p>The schedule's duration includes all the days not worked set up for the company.</p> <div> <div>Example</div> <p>You create a schedule with a 4-day duration, starting on Monday. On the selected week, Wednesday happens to be a national holiday. Two schedule blocks will be added: a first block of two days (from Monday to Tuesday) and a second block of two days (from Thursday to Friday).</p> </div> <p>However, it is possible to schedule items on the days not worked indicated in the standard week of the employee allocated to the selected schedule.</p> <p>The workload is counted based on that duration.</p> <div> <div>Example</div> <p>You add a 1 hour (0.14 day)-duration schedule on a day with a workload of 07:42. The remaining time to be scheduled for a one-day task would therefore stand at 0.86.</p> </div>
<b>Full day</b>	<div> <div>Note</div> <p>This field is only displayed if the PLG_HORODATE management rule is activated.</p> </div> <p>Check the <b>Full day</b> option if you want the item to be scheduled in full days. In this case, you can enter the item's start and end dates but you cannot modify the time, as it is displayed for information purposes only.</p> <p>In this case:</p>

Field	Description
	<ul style="list-style-type: none"> <li>Check <b>Ends at noon</b> if you want to schedule an item that ends at noon for more than one day.</li> <li>Check <b>Starts on the afternoon</b> if you want to schedule an item that starts on early afternoon for more than one day.</li> </ul> <div> <p><b>Examples</b></p> <p>You want to schedule an item on Monday 25: you schedule it from the 25th to the 25th and check <b>Full day</b>. The item created is scheduled for 1 day.</p> <p>You want to schedule 2 days and a half, from Monday 25 to Wednesday 27: you schedule it from the 25th to the 27th and check <b>Full day</b>.</p> <ul style="list-style-type: none"> <li>If you check <b>Ends at noon</b>, the item will be scheduled from Monday morning to Wednesday noon. The item created is scheduled for 2 days and a half.</li> <li>If you check <b>Starts on the afternoon</b>, the item will be scheduled from Monday afternoon to Wednesday evening. The item created is scheduled for 2 days and a half.</li> <li>If you check both <b>Starts on the afternoon</b> and <b>Ends at noon</b>, the item will be scheduled from Monday early afternoon to Wednesday noon. In this case, the item is created is scheduled for 2 days.</li> </ul> </div> <p>Items scheduled on full days are displayed in the calendar's header, in the <b>Calendar</b> menu.</p>
<b>Location</b>	The location of the scheduled item. It is a free-form field that is used for informational purposes only.
<b>Employee</b>	<p>The employee allocated to the scheduled item.</p> <p>Enter at least three letters of the code or name of an employee to display the list of relevant employees, then select the employee of your choice.</p> <div> <p><b>Note</b></p> <p>The employee list contains the name of all the employees allocated to the same company as the project linked to the scheduled item, as well as multi-company employees. This list also takes into account all the restrictions applied both on the project and the task.</p> </div>
<b>Online meeting</b>	<p>When this box is checked, the scheduled item is expected to hold online, via a video conferencing tool.</p> <p>This option enables you to transfer an online meeting to an Outlook calendar with the PlanningExchange batch.</p> <div> <p><b>Reference</b></p> <p>For more information about the PlanningExchange batch, refer to the <i>Advanced Setup Guide</i>.</p> </div>
<b>Comment</b>	<p>A comment on the scheduled item.</p> <p>This field must be filled when the PLG_COMMENTAIRE management rule is activated.</p>

Field	Description
<b>Description</b>	<p>The description of the scheduled item.</p> <p>This field is only displayed if the PLG_DESCRIPTOR management rule is activated.</p>
<b>Action</b>	<p>The action associated with the scheduled item. Actions displayed in the drop-down list vary depending on the schedule's project.</p> <p>If the selected project is linked to a single action code, then that code is automatically filled in.</p>
<b>Order line</b>	<p>The order lines associated with the schedule's project.</p> <p>This field is only displayed if the PLG_CMDCLI management rule is activated.</p>
<b>Validated</b>	<p>When this box is checked, the scheduled item is considered as validated. The item is considered as not validated when the box is not checked.</p> <p>This box cannot be checked or unchecked manually. To validate a scheduled item, refer to <a href="#">Validating or canceling validation of scheduled items (p. 40)</a>.</p>
<b>Done</b>	<p>When this box is checked, the scheduled item is considered as done. When this box is not checked, the item is considered as not done.</p> <p>This box can be manually checked, or checked using the <b>Mark as done</b> option. For more information, refer to <a href="#">Marking a scheduled item as done or to be done (p. 40)</a>.</p> <div> <p><b>Note</b></p> <p>A schedule marked as done cannot be transferred into timesheets.</p> </div>
<b>Period</b>	<p>Enables you to identify whether the item is scheduled for the <b>Morning</b>, the <b>Afternoon</b> or the full <b>Day</b>.</p>
<b>Quarter of day</b>	<div> <p><b>Note</b></p> <p>This field is not displayed if the PLG_HORODATE management rule is activated.</p> </div> <p>Click on the quarter of day of your choice to automatically modify the item's start time.</p> <p>Quarters of day are established based on the standard week of the employee allocated to the schedule.</p> <div> <p><b>Example</b></p> <p>The employee allocated to the schedule has a standard week of 7 working hours per day, from 9:00 AM to 12:30 AM and from 1:30 PM to 5:00 PM. For a scheduled item:</p> <ul style="list-style-type: none"> <li>• 1st quarter = the start time will be 9:00 AM</li> <li>• 2nd quarter = the start time will be 10:45 AM</li> <li>• 3rd quarter = the start time will be 1:30 PM</li> <li>• 4th quarter = the start time will be 3:15 PM</li> </ul> </div>

Field	Description
	<p><b>Note</b></p> <p>If the PLG_8EME_JRNEE management rule is activated, then only the eight quarters of day are displayed.</p>
<b>Allow on Saturdays</b>	<p><b>Note</b></p> <p>These fields are hidden if the PLG_HORODATE management rule is active.</p> <p>This option enables you to indicate whether the days not worked of an employee must be taken into account or not, when scheduling standby duties for example.</p>
<b>Allow on Sundays</b>	<p><b>Example</b></p> <p>You create a scheduled item with a 10 day-duration, setting Monday, October 5 as the start date. You check <b>Allow on Saturdays</b> and leave the <b>Allow on Sundays</b> option unchecked.</p> <p>The newly-created item will therefore be scheduled from Monday, October 5 to Wednesday, October 14.</p>
<b>Allow on national holidays</b>	
<b>Tags</b>	<p>The PLG_AUTORISER_LES management rule can be used to automatically check these options when creating a scheduled item.</p> <p>In a timestamped schedule, these options are automatically checked and set as default options when the <b>Full day</b> option is not checked.</p> <p>Enter the first letter of the tag you are looking for to open the list of relevant tags, then click on the tag to add it to the scheduled item. Only the tags from the <b>Schedule</b> type are displayed in the list. You can add as many tags as necessary.</p> <p><b>Tip</b></p> <p>Press <i>F2</i> to open the list of all the tags available for scheduled items.</p> <p>To create a new tag right away:</p> <ol style="list-style-type: none"> <li>1 In the <b>Tags</b> field, enter the label of the new tag and press the <i>Tab</i> key, or click on another field.</li> <li>2 Fill in the required fields in the <b>New tag</b> window that displays.</li> </ol> <p><b>Reference</b></p> <p>For more information about tags and fields to fill, refer to the <i>Advanced setup</i> Guide.</p> <ol style="list-style-type: none"> <li>3 Click on <b>Save</b>.</li> </ol> <p>➞ The tag is created and automatically added to the scheduled item. Tags are also displayed as colored icons in the schedule block. More information about those tags can</p>

Field	Description
	<p>be found in each item's tooltip.</p> <p>To modify a tag, click on the tag in a schedule's form, make all necessary modification and click on <b>Save</b>.</p>
<b>Project</b>	<p>Displays the name of the <b>Customer</b> and the assignment associated with the scheduled item.</p> <div> <p><b>Note</b></p> <p>If the project is a leave project, users who do not have the DMF 250113 cannot access the project's detailed information.</p> </div>

## 6.2.2 Information about the task


### Note

It is possible to schedule on a task, even if the remaining time to be scheduled is less than or equals 0.

Field	Description
<b>Label</b>	The label of the task to be scheduled.
<b>Total duration</b>	<p>The total duration of a task, which can be different from the scheduled item's duration. This duration refers to the number of days to be scheduled in order to complete the relevant task. When the total duration changes, the duration to be scheduled is automatically updated.</p> <div> <p><b>Note</b></p> <p>The excess is not taken into account when calculating the total duration of the task.</p> </div> <p>To facilitate workload monitoring, detailed information about the duration is displayed in a 3-column table, with the following status:</p> <ul style="list-style-type: none"> <li>• <b>Done</b> - The total duration of completed scheduled items (<b>Done</b> field checked) linked to the task.</li> <li>• <b>Scheduled</b> - The total duration of all the scheduled items of the task.</li> <li>• <b>To be sched.</b> - The number of days to be scheduled after deducting scheduled and done days from the total duration. The excess is taken into account if indicated.</li> </ul> <p>When the total duration is 0, the 3-column table is not displayed. Instead, the <b>No estimated workload</b> label is displayed.</p>
<b>Excess</b>	<p>The number of days exceeded when performing the task.</p> <p>This field displays only if an excess is indicated, and is included in the <b>To be sched.</b> field.</p>
<b>Start</b>	The start date of the task.
<b>Due date</b>	The estimated date at which the task will be completed.

## 6.3 MODIFYING A SCHEDULED ITEM

Click on a scheduled item in the **Schedule** and **Calendar** menus to display its detailed form on the right side of the screen. Make all necessary modification and click on **Save** to update the information.

The fields in the **Task** section are shaded, as you can modify them by clicking on .

### Reference

For more information, refer to [Modifying the tasks to be scheduled \(p. 45\)](#).

You can also modify some information on a scheduled item directly from its contextual menu, which can be accessed by right-clicking on the item. This contextual menu also displays when you select several items to modify a significant number of items at once.

To quickly modify the duration of a scheduled item:

- From the **Schedule** menu, click on the left or right borders of the item in the calendar; hold down the cursor to zoom in / zoom out the block, and release it when the item has the desired duration.
- From the **Calendar** menu, click on the top or bottom borders of the item for items schedules in the timestamped calendar. For items scheduled on full days, click on the left or right borders of the item, in the calendar's header.

## 6.4 SELECTING SCHEDULED ITEMS

If you want to modify a single scheduled item, click on the item in the calendar of the **Schedule** or **Calendar** menus to open its form on the right side of the screen, or right-click on the item to open its contextual menu.

From the **Schedule** and **Calendar** menus:

- To select several scheduled items, select them in the calendar by pressing and holding down the **CTRL** key, then right-click on the selected items to open the contextual menu.
- To select all the scheduled items displayed in the calendar, press **CTRL + A** and right-click on the selected items to open the contextual menu.
- To unselect items, right-click on the selection in the calendar to open the contextual menu, then click on **Unselect all**

From the **Schedule** menu only, if you want to select all the scheduled items linked to an employee or a project (depending on the selected view) for the displayed timeline, right-click on the resource of your choice in the first column of the calendar and click on **Select all items**, then right-click on the selected items to open the contextual menu. From the same menu, the cumulative duration of the selected schedules is displayed in a banner at the bottom of the screen when you select at least two scheduled items.

## 6.5 VALIDATING OR CANCELING VALIDATION OF SCHEDULED ITEMS

Validating one or several scheduled items means that the **Validated** box is checked in the item's form. This box cannot be manually checked in the form.

It is only possible to validate an item if the allocated employee is a resource linked to the project. However, if the planner has the DMF 250116 PROJECT SCHEDULES LINK EMPLOYEE TO PROJECT / PROJECT TASK, the employee is automatically added as a project's resource when creating a scheduled item, and it is therefore possible to validate the item.

- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).
- 2 Click on **Validate** or **Validate all** in case you have selected several items.

↳ The selected scheduled items are validated.

To uncheck the **Validated** box, right-click on the item(s), then click on **Cancel validation** or **Cancel validation for all** in case you have selected several items.

### Note

When displaying the contextual menu for one scheduled item, only one option is available: **Validate** if the item has not yet been validated and **Cancel validation** if the item was already validated.

## 6.6 MARKING A SCHEDULED ITEM AS DONE OR TO BE DONE

Marking one or several scheduled items as done means that the **Done** box is checked in the item's form.

- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).
- 2 Click on **Mark as done** or **Mark all as done** in case you have selected several items.

↳ The selected scheduled items are marked as done.

To uncheck the **Done** box, right-click on the item(s), then click on **Mark as to be done** or **Mark all as to be done** in case you have selected several items.

### Note

When displaying the contextual menu for one scheduled item, only one option is available: **Mark as done** if the item has not yet been done and **Mark as to be done** if the item has already been done.



## 6.7 RESCHEDULING A SCHEDULED ITEM

You can reschedule the date of one or several scheduled items, from the contextual menu. You can also move a scheduled item within the calendar.

If an item is moved to a not worked day and is not allowed on Saturdays, Sundays or national holidays, then that item will be automatically transferred to the next worked day. Similarly, if an item is scheduled for several days, the transfer takes into account days not worked, and the item can be dissociated into several scheduled items, if necessary.

From the contextual menu:

- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).
- 2 Click on **Reschedule** or **Reschedule all** in case you have selected several items.
- 3 Reschedule the item(s) at the date of your choice, then click on **Validate**.  
↳ The selected scheduled items are rescheduled.

By moving a scheduled item within the calendar:

To move a scheduled item, click on the item in the calendar and drag it to the date of your choice:

- From the **Project** view in the **Schedule** menu, an item can be moved to another period.
- From the **Employee** view in the **Schedule** menu, an item can be moved to another period and to another employee (if that employee is displayed in the calendar).
- From the **Calendar** menu, an item can be moved to any date and time.

## 6.8 REALLOCATING A SCHEDULED ITEM

From the contextual menu, you can reallocate one or several scheduled items to another employee. You can also reallocate a scheduled item directly in the calendar.

From the contextual menu:


- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).
- 2 Click on **Reallocate to...** or **Reallocate all to...** in case you have selected several items.
- 3 Enter the name of the employee you want to reallocate to the item(s), then click on **Validate**.  
↳ The selected scheduled items are reallocated.

By moving a scheduled item within the calendar:

From the **Employee** view in the **Schedule** menu, you can reallocate an item to another employee. To do so, check if both employees are displayed in the calendar, then click on the item and move it to the employee and day of your choice.

## 6.9 REASSIGNING A SCHEDULED ITEM

From the contextual menu, you can reassign one or several scheduled items.



- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).
- 2 Click on **Reassign on...** or **Reassign all on...** in case you have selected several items.
- 3 In the search field , enter the first three letters of the name or code of the customer, project, phase or sub-phase you are looking for, to filter the displayed results.
- 4 Select the relevant assignment.  
↳ The selected scheduled items are reassigned.

## 6.10 DISSOCIATING A SCHEDULED ITEM

### Note

The dissociation can only be done from the **Schedule** view.

A scheduled item can be dissociated, meaning it can be split into several scheduled items. For example, the dissociation can be done to change the day scheduled for an item or assign an item to another employee.

- 1 In the calendar, right-click on a scheduled item and click on **Dissociate**.  
↳ A window opens and by default, suggests you dissociate the item into two.
- 2 Click on  or  to enter the number you want your item to be dissociated into, keeping in mind the minimum number is two.
- 3 Modify the duration of each item.

### Important

The total duration of the dissociated items must be equal to the duration of the original scheduled item.

- 4 Click on **Dissociate**.  
↳ Scheduled items are created with their corresponding duration. Dissociated items share the same information as the original item.

## 6.11 EXPORTING SCHEDULED ITEMS


You can export an item or several items in .ics format. This format enables you to import the schedule from Project to another scheduling tool (for example Microsoft Outlook, Google Calendar, Apple calendar, etc.).

- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).

- 2 Click on **Export**.

↳ The selected scheduled items are exported in an .ics file, which is automatically downloaded from your browser.

## 6.12 PRINTING SCHEDULES

- 1 From the **Schedule** and **Calendar** menus, select a timeline and apply all necessary filters to display the scheduled items you want to print.
- 2 Click on  at the top right of the Project's screen.
- 3 Select the printing **Template** in the drop-down list, then choose the printing format.
- 4 Click on **Validate**.

↳ The schedule is printed and saved on your computer.

## 6.13 PUBLISHING A SCHEDULED ITEM

From the **Schedule** menu, you can publish one or several scheduled items in order to display the relevant schedule in the Customer Portal of the customer linked to the scheduled project.

- 1 From the **Schedule** and **Calendar** menus, open the contextual menu of the selected item(s).
- 2 Click on **Publish** or **Publish all** in case you have selected several items.

↳ The selected scheduled items are published.

To cancel publication, right-click on the item(s) and click on **Cancel publication** or **Cancel publication for all** in case you have selected several items.

### Note

When displaying the contextual menu for one scheduled item, only one option is available: **Publish** the item if it has not yet been published and **Cancel publication** if the item has already been published.

## 6.14 DELETING A SCHEDULED ITEM

### Important

Deleting a scheduled item cannot be reversed.

To delete a scheduled item from the **Schedule** and **Calendar** menus:

- In the calendar, right-click on the item(s), click on **Delete**, then confirm deletion.
- Click on a scheduled item in the calendar to display its form, then click on **Delete** at the bottom of the form.

# 7 Managing tasks to be scheduled

The Project's portal enables you to access the list of tasks to be scheduled based on the selected view, timeline and filters. The list of tasks to be scheduled can be accessed from the **Schedule** and **Calendar** menus.

## Important

The list of tasks to be scheduled can be accessed from the **Schedule** and **Calendar** menus. From the **Estimated workload** menu, the tasks can be displayed if relevant filters are applied.

A task to be scheduled is a task which duration to be scheduled (**To be sched.** field) is greater than 0. If the remaining time to be scheduled of a task is equal to 0, then that task is no longer displayed in the list of tasks to be scheduled.

The tasks to be scheduled help you quickly create new scheduled items by using the same information entered on a task.

## Reference

For more information about creating a schedule from the list of tasks to be scheduled, refer to [Creating a scheduled item \(p. 29\)](#).

## 7.1 DISPLAYING TASKS TO BE SCHEDULED

The tasks to be scheduled are displayed in a pane on the right side of the screen, for the **Schedule** and **Calendar** menus. To display this pane, activate the **Tasks to be scheduled** option at the top of the screen.


The tasks available in this pane vary depending on the selected view, timeline and filters:



- The tasks that are displayed are the ones in progress within the selected timeline.
- From the **Project** view in the **Schedule** menu, the tasks that are available are tasks linked to projects displayed in the calendar as resources. From the detailed view of a project, only the tasks of the selected project are displayed.
- From the **Employee** view in the **Schedule** menu and from the **Calendar** menu, all tasks in progress are displayed, with no filter applied on projects.

Each task to be scheduled has a card that displays that task's label and the remaining time to be scheduled. For each task, a color border replicates the color code that helps differentiate between external, internal and leave projects. Click on a task to display more information.

## 7.2 SORTING AND SEARCHING FOR TASKS TO BE SCHEDULED

You can sort the list of tasks to be scheduled, if necessary and search for one or several specific tasks.

Search for the task(s) of your choice by entering the first three letters of the task(s) in the search field . The list automatically displays the relevant tasks.

In the drop-down list of the **Sort by** field, choose the type of sorting you want to apply. The tasks will then be sorted based on the sorting option that was applied. Click on  to sort the tasks in ascending or alphabetical order, or click on  to sort the tasks in descending or reversed alphabetical order. The sorting order is applied to the groupings.



### Example

You choose to sort the list by *Customer*, in alphabetical order. The tasks are therefore grouped per linked customer, and the names of the customers are sorted in alphabetical order.

## 7.3 MODIFYING THE TASKS TO BE SCHEDULED

The tasks to be scheduled are created from the Application Desktop but can be modified from the Project's portal.

**1** To modify a task:

- From the tasks to be scheduled pane, click on a task to display more information about it, then click on .
- From the form of a scheduled item created from a task, click on  at the top right of the **Task** section.
- From the **Estimated workload** menu, right-click on a task in the first column, then click on **Modify**.

**2** In the window, make all necessary modification in the following fields:

Field	Description
<b>Label</b>	The label of the task to be scheduled.
<b>Total duration</b>	<p>The total duration of the task. This duration refers to the number of days to be scheduled in order to complete the relevant task. When the total duration is modified, the duration to be scheduled is automatically updated.</p> <p>To facilitate workload monitoring, detailed information about the duration is displayed in a 3-row table, with the following status:</p> <ul style="list-style-type: none"><li>• <b>Done</b> - The total duration of completed scheduled items (<b>Done</b> field checked) linked to the task.</li><li>• <b>Scheduled</b> - The total duration of all the scheduled items of the task.</li><li>• <b>To be sched.</b> - The number of days to be scheduled after deducting scheduled and worked days from the total duration. The excess is taken into account if indicated.</li></ul> <p>If the total duration is equal to 0, the workload monitoring table is not displayed.</p>
<b>Excess</b>	<p>The number of days exceeded when performing the task.</p> <p>This field is only displayed if an excess is indicated, and is included in the <b>To be sched.</b> field.</p>

Field	Description
<b>Start</b>	The start date of the task.
<b>Due date</b>	The estimated date at which the task will be completed.

#### Note

The customer and the assignment associated with the task are displayed in the **Project** section and cannot be modified from the task form. However, you can modify the assignment from the scheduled item created from a task.

- 3 Click on **Save** to apply the modification.




## 8 Managing favorites

A favorite enables you to save a set of filters, to reuse them later. A favorite keeps track of applied filters, activated display options and the menu or the view in which the favorite was saved. However, the displayed timeline is not saved with the favorite, as only the timeline that was previously displayed is saved.

### Example




You save your favorite in a 4-month view, from September to December 2020. When displaying this favorite, you select a new timeline — from January to April 2021. If you change the view or display another favorite and then display that favorite again, the last timeline will be used — from January to April 2021.

Favorites can be accessed in two ways:


- From the drop-down list   on the right side of filters. This list can be accessed from all menus in Project, but only favorites specific to a menu are displayed.
- The  **Favorites** menu on the left side of the screen. This menu helps quickly access some favorites. It contains favorites saved in the **Schedule**, **Calendar** and **Estimated workload** menus.

When a favorite is created, the user becomes the owner of that favorite, meaning only that user can modify or delete it. When a user logs into Project, only his favorites are displayed. He cannot access favorites created by other users, unless he receives a link to a favorite.

### 8.1 CREATING A FAVORITE

- 1 Choose a menu and a view, apply the filters and activate the display options of your choice, then click on , on the right side of the filters.
- 2 Enter a **Name** to identify the favorite.
- 3 To customize the icon linked to the favorite, click on  and on the icon of your choice. You can search an icon by entering keywords in *English*.
- 4 Activate the **Favorite added to menu** option, if you want to add this favorite to the  **Favorites** on the left side of the screen.

### Tip

The  **Favorites** menu contains the favorites saved in the **Schedule**, **Calendar** and **Estimated workload** menus in one place. To differentiate between them, make sure you name them differently.

- 5 Activate the **Set as home page** option, if you want this favorite to be displayed when you log into Project.

### Note

Only one favorite can be set as home page. If you create or modify a favorite to set it as home page, whereas another favorite was already used, the **Set as home page** option will be deactivated for this previous favorite.

- 6 Click on **Save**.

↳ The favorite is created. The icon turns green ★ to indicate that a favorite is displayed.

To find this favorite, open the drop-down list ▼ on the right side of filters or click on the ★ **Favorites** menu on the left side of the screen, if you have activated the **Favorite added to menu** option.

### Tip

To unselect a favorite, open the drop-down list ▼ on the right side of filters, then click on the selected favorite.

## 8.2 MODIFYING A FAVORITE

- 1 Select the favorite of your choice.

↳ The icon turns green ★.

- 2 Add new filters or display options, or delete existing filters to modify the favorite.

↳ The icon becomes ★ to indicate that the displayed favorite was modified.

### Note

Filters that were already saved in the favorite are displayed in green. Filters that are added are displayed in blue.

- 3 Click on ★ to modify the **Name**, the icon or the way the favorite is displayed in the ★ **Favorites** menu.

- 4 Click on **Save** to apply the modification.

## 8.3 SHARING A FAVORITE

A user who creates a favorite becomes its owner. The favorite is added to his list of favorites, and only that owner can modify or delete it. The other users will not be able to access the favorite, unless it is shared with them.

To share a favorite, select it, copy the URL in your browser and send it to the employee(s) of your choice.

When those other users get the URL, they can access the favorite as well as its filters and display options. A filter that was shared cannot be modified or deleted by other users. However, a user that






does not own a shared favorite can duplicate it (see [Duplicating a favorite \(p. 49\)](#)), to retrieve its features and create a new favorite.

## 8.4 DUPLICATING A FAVORITE

A favorite can be duplicated to quickly reuse its features:

- When a favorite is modified, the duplication enables you to keep the original favorite while creating the new one.
- When a favorite is shared, the duplication allows the other users to retrieve the features of the original favorite to create their own favorite.

- 1 Choose the favorite you want to duplicate.
- 2 Make all necessary modification (the **Name**, the filters, etc.).
- 3 Click on  or , if you did modify the favorite, then click on **Duplicate**.  
 The favorite is duplicated and the new favorite is directly displayed.

## 8.5 DELETING A FAVORITE

### Important

Deleting a favorite cannot be reversed.

Choose the favorite of your choice, click on , then **Delete** and confirm the deletion.