Deltek People Planner 4.7

Fundamentals Guide

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Contents

Overview

This guide describes the functionalities of the two main views in People Planner, the Project Managers Gantt chart (PG) and the Resources Gantt chart (RG).

Although this guide covers much of the People Planner functionality, there are functional areas that this guide does not describe. In addition, some of the functionality that this guide describes is only available if the event or resource does not have its origin in Maconomy.

For the purposes of this guide, the term *control* refers to elements of the user interface that you can operate to control what you see or what should happen. This includes the following:

- Buttons
- Input fields
- Check boxes
- Radio buttons
- Date pickers
- Dropdowns

For a list of all of the controls, see Controls in the PG and Controls in the RG for the description of a specific control from the appropriate list.

Terms and Abbreviations

The following table defines some of the central terms used in People Planner.

Term	Definition
Account	An account is where the numbers go. For example, there is an account that holds all of the allocated hours (that is, the planning), an account for time registrations, an account for budgeted man hours, and so on.
Actuals	This is a type of account that holds “actual values,” as opposed to “planning values,” for example, time registrations, as opposed to the planning values of bookings.
Allocation	This is also known as a “booking” or “man hour entry,” when a resource has been assigned to work on an event for a specified number of hours. **Note:** Beginning with Release 3.8.4, People Planner supports amount lines. For amount lines any allocations/bookings are assumed to be monetary amounts, rather than hours.
Assignment	An assignment is a link between a resource and an event. An assignment can be created from either the PG or the RG. In the PG, you select a task and assign a resource on it; in the RG, you select a resource and assign it to an event. The sub-grids in the PG and RG are two ways of showing the same assignments, with the catch that each shows only those assignments that belong to the selected event or resource. The Assignment Gantt chart (AG) shows all assignments.

Term	Definition
	The actual number of hours on an assignment need not have been specified (see *Allocation*).
Booking	See *Allocation*.
Capacity	The capacity indicates how many hours the resource can be booked for. It is determined by the calendars.
Cell	In the PG and RG, this is the term for the input fields in a Gantt where a user enters the hours of a booking.
Control	These are the elements of the graphical user interface (GUI) that users can operate to control what they see or what happens on the screen. Controls include buttons, radio buttons, check boxes, date pickers, dropdowns, input fields, and so on.
Diagram	A commonly used term for the bottom-rightmost part of a Gantt chart, such as the PG and RG. The Diagram part is sometimes also called the Gantt because it is the location where the Gantt bars are displayed. See also *Header* and *Grid*.
ERP	Enterprise Resource Planning. This usually refers to the Maconomy product.
Event	This is a shared term for project, subproject, task, summary, milestone, and absence. Many of the People Planner functions do not distinguish among the kinds of events.
Gantt	See *Diagram*.
Grid	A commonly used term for the bottom-leftmost part of a Gantt chart, such as the PG and RG. See also *Header* and *Diagram*.
Header	A commonly used term for the top-most part of a Gantt chart, such as the PG and RG. See also *Grid* and *Diagram*.
Load	The sum of all bookings is the load. It is usually compared to the capacity.
Perspective	This is a saved setup that focuses on enabling a user to perform some task, such as building up a project by adding events, assigning resources, and allocating them. A perspective consists of one or more customized views.
PG	Project Manager Gantt chart. As the name indicates, this chart is intended for a project planner's point of view.
Resource	Resources can be individuals, budgets, teams, locations, and so on. Resources are used for planning; they can be assigned on events and can be allocated for some hours. Most resources are of the Kind "Individual," which is an employee.

Term	Definition
RG	Resources Gantt chart. As the name indicates, this chart is intended for a resources manager’s point of view.
User	A person who can log in to People Planner. Users are usually resources, and the other way around, but that is not a requirement.
View	A view is a window that focuses on a certain set of capabilities. The views are the fundamental building blocks of the People Planner GUI. Users normally do not see the views, but instead are presented with a setup where one or more views are combined, configured, and then saved as a perspective.
WBS	Work Breakdown Structure. This refers to the hierarchical tree structure where a project is built up by events.

Gantt Charts

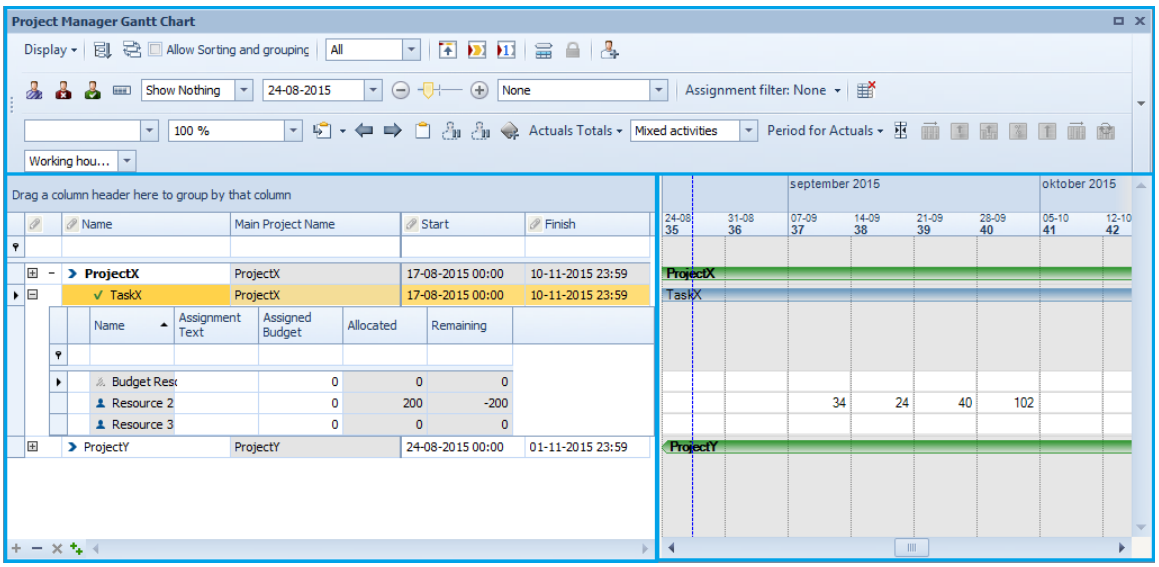
Almost all functionality in People Planner involves one or both of the two main Gantt charts:

- Project Manager Gantt chart (PG)
- Resources Gantt chart (RG)

These two charts are each divided into three parts:

- **Header**.
- **Grid** to the left.
- **Diagram** to the right; this often shows a Gantt chart.

The following figure shows the Header, Grid, and Diagram parts of the PG.



- The Header is where the controls are. Some of the controls act on the Grid, and some act on the Diagram.
- The Diagram is where you do planning, such as booking a resource for a number of hours in a given period.
- The Grid has a single main grid. For each line in that grid, there is a sub-grid:
  - The main grid shows events (the PG) or resources (the RG).
  - The sub-grids, sometimes also called the assignment sub-grids, show the assignments.
  - Both the main grid and the sub-grids have columns, which display information about the events and resources.

Both the PG and RG are called Gantt charts because the Diagram can show Gantt bars. This is obvious for the PG, but even though it is not the default for the RG, it is supported there as well. See Show Activities / Show Bookings.

Configuring Gantt Charts

You can configure all three parts of the Gantt charts. The purpose of this is typically to remove controls that are not being used, or to add columns and accounts to display wanted information.

> **Note:** The figures in this guide usually show the default setups of views—that is, how they look before they are configured. This appearance is not the way that most users experience them; most users experience views that have been configured and saved as perspectives.

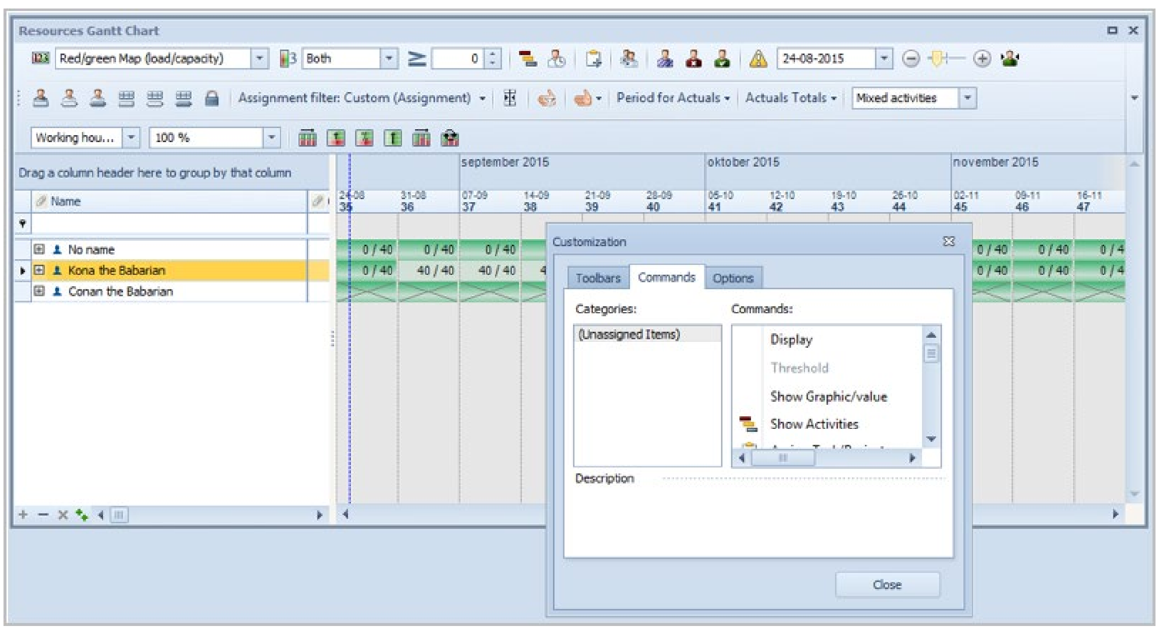
Configure the Header

You can configure the Header in several ways:

- Rearrange controls.
- Remove controls.
- Add controls.
- Set a control to a specific value, and then perhaps disable or remove that control so that users cannot change its value.

To configure the PG or RG Header part:

1. Right-click on the Header part and choose **Customize …** from the shortcut menu that appears. The Customization dialog opens.



2. Do **any** of the following, as appropriate:
   - Drag a control to a different location.
   - Drag a control “off” the header to remove it.
   - Drag a control from the **Commands** tab of the Customization dialog onto the Header part of the PG or RG to add it to the Header part.

3. Click **Close** when you are done.

Configure the Grid

You can configure the Grid part—both the main grid and its assignment grids—in several ways:

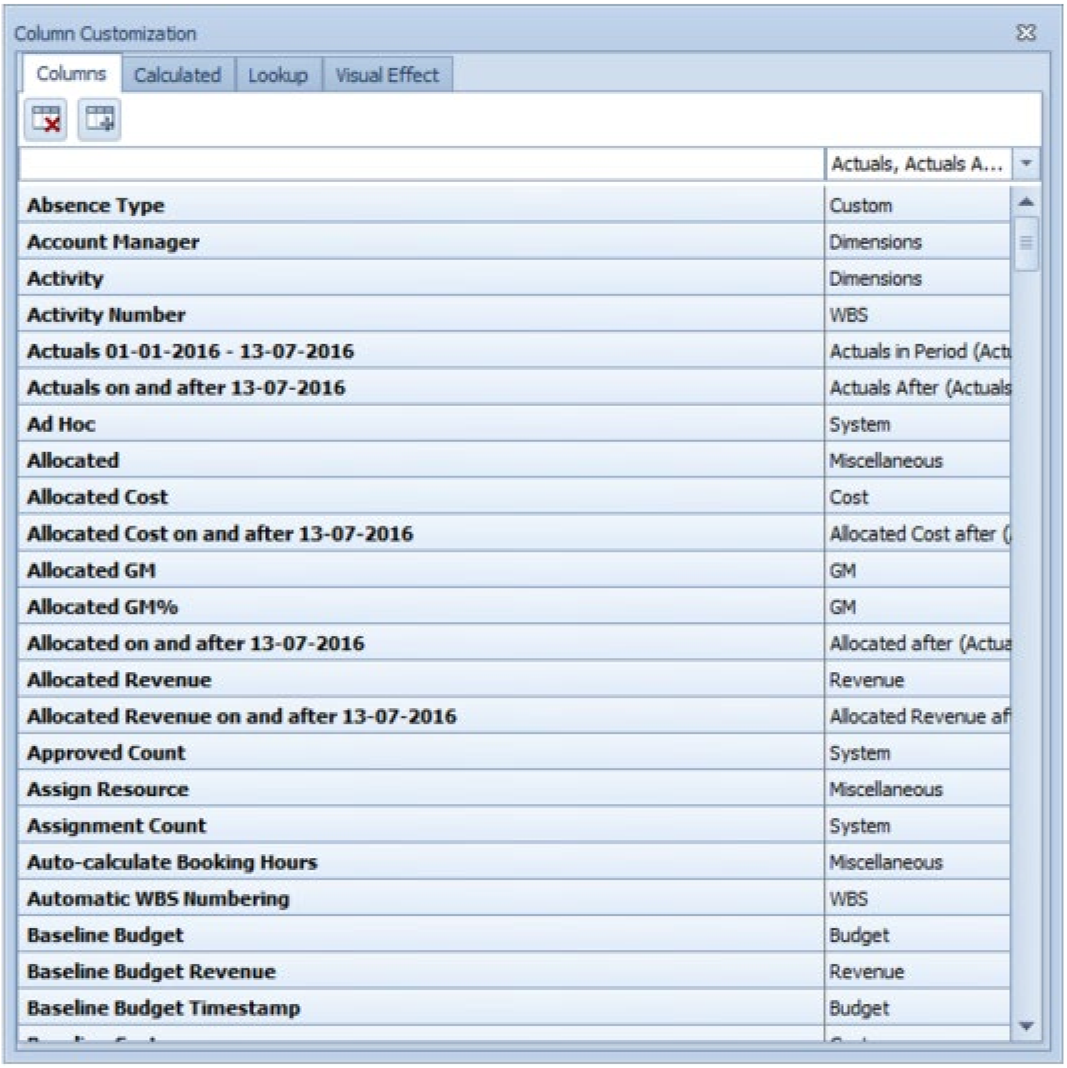
- Rearrange columns.
- Remove columns.
- Add columns.
- Define and add new columns.
- Group entries on one or more columns.

To rearrange columns:

» Click and hold on a column header and drag it to another location.

To add a new column:

1. Right-click anywhere on the line of the column headers. This opens the shortcut menu.
2. Choose **Column Chooser** from the shortcut menu. The **Column Customization** dialog opens. This dialog enables you to choose from the following:
   - **Columns** — These are People Planner's predefined columns.
   - **Calculated** — Use these to define new columns that should be calculated according to some formula.
   - **Lookup** — These are for columns that are not covered elsewhere.
   - **Visual Effect** — These are used to highlight the values in columns depending on criteria that you define.

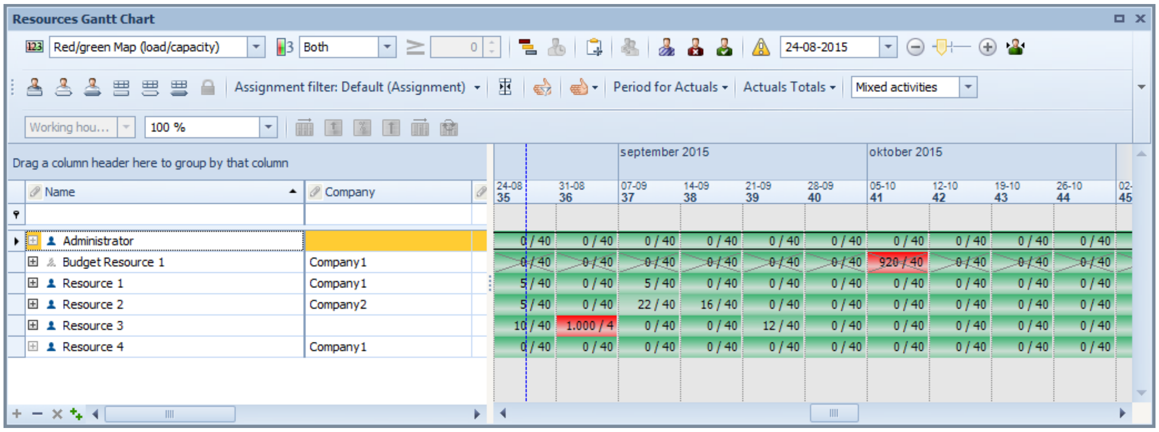


3. Add columns by dragging them from the dialog onto the header line, or by double-clicking the column in the Column Chooser dialog.

For an example of a calculated column, see Columns that Depend on the Period for Actuals.

Group Within Columns

You can group the PG and RG on columns; that is, all events/resources that have the same value in the column are bundled together in a group. The following figure shows resources that belong to Company 1 or Company 2, or the company is unspecified.

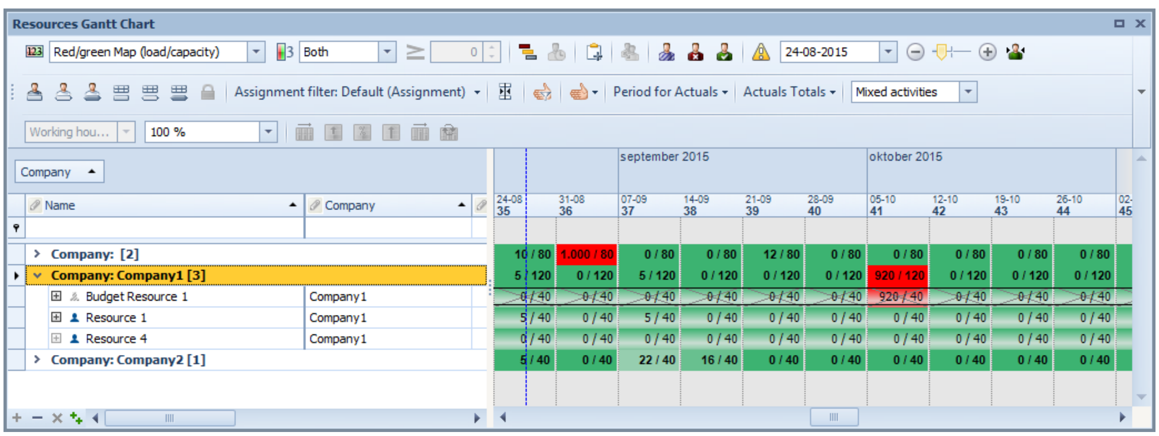


To group on a column:

» Click on a column header and drag it onto the **Drag a column header here** area and release it.

> **Tip:** To group on more than one column, drag each column, one by one, onto the grouping area.

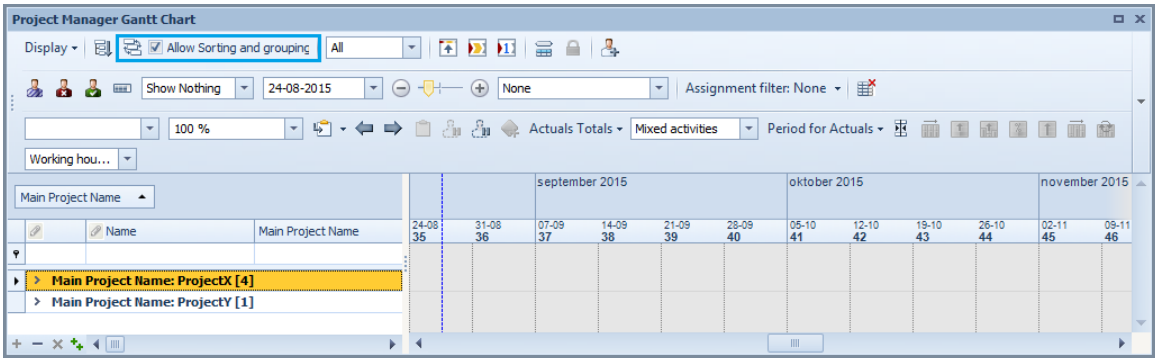
The following figure shows grouping on the Company column. The numbers in the [ ] brackets indicate the number of elements in the group.



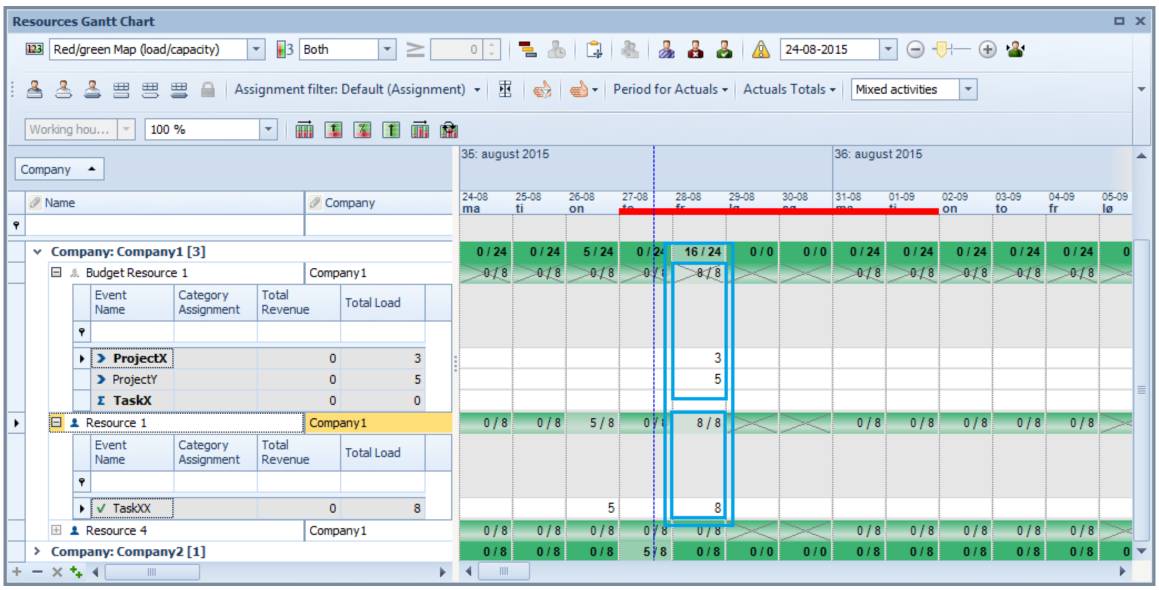
You can expand and collapse a group by clicking the small **>** button.

> **Note:** You can group in both the PG and the RG. However, in the PG you must select the Allow Sorting and Grouping check box

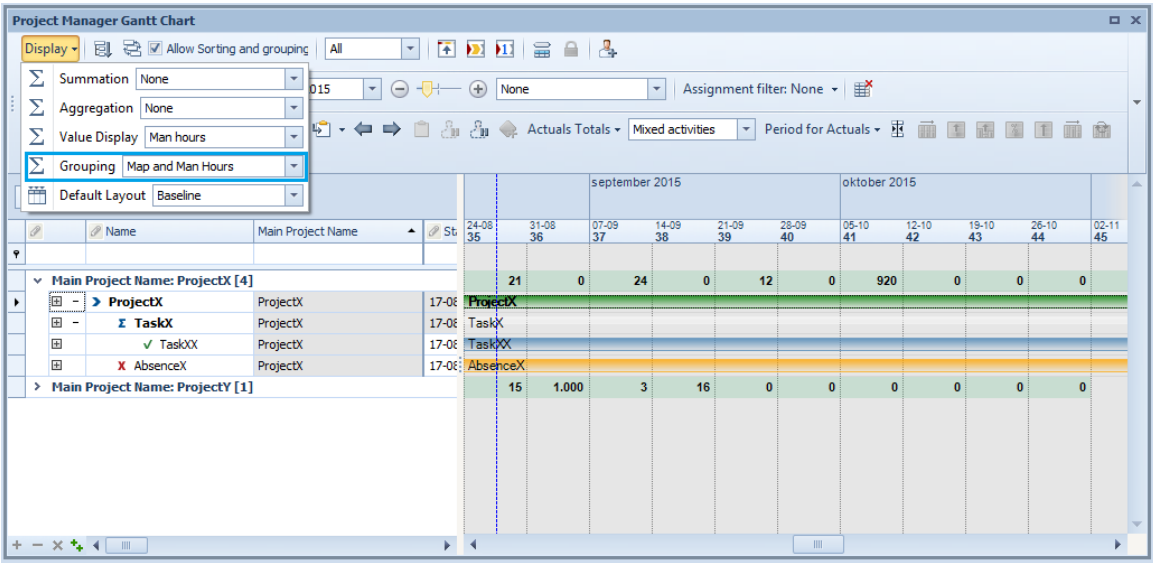
The following example shows the use of the **Allow Sorting and Grouping** check box in the PG.



In the RG, each grouping line displays the sum of all of the bookings that are included in the group. The following figure shows the summation of groupings on the resource level and on the group level.



For the PG, the behavior of the grouping lines is determined by the setting **Display » Grouping**.



Configure the Diagram

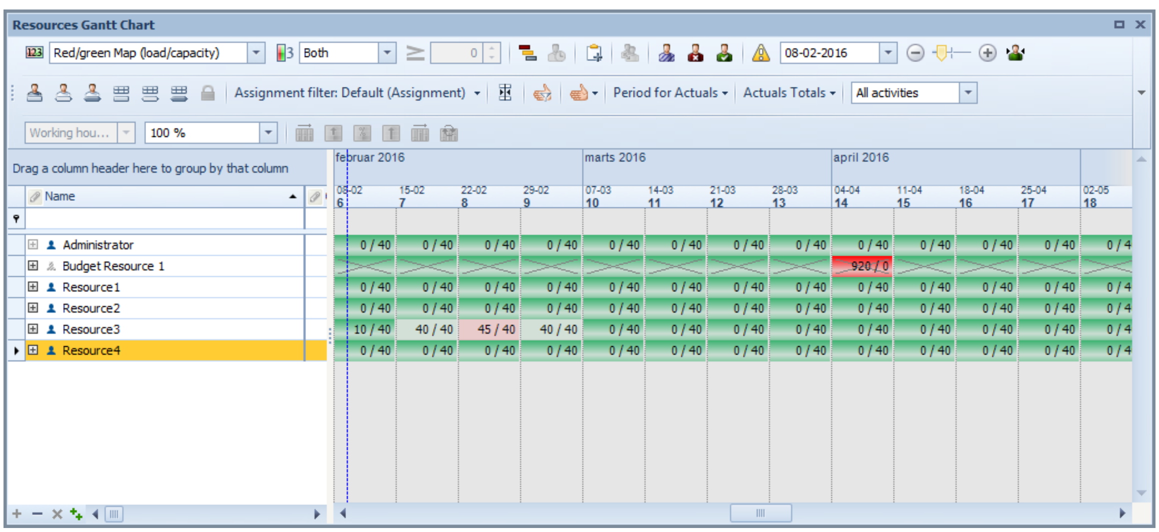
You can configure the Diagram part in several ways:

- Set up which accounts it should display. It can show up to four accounts side-by-side.
- Set up the color scheme.

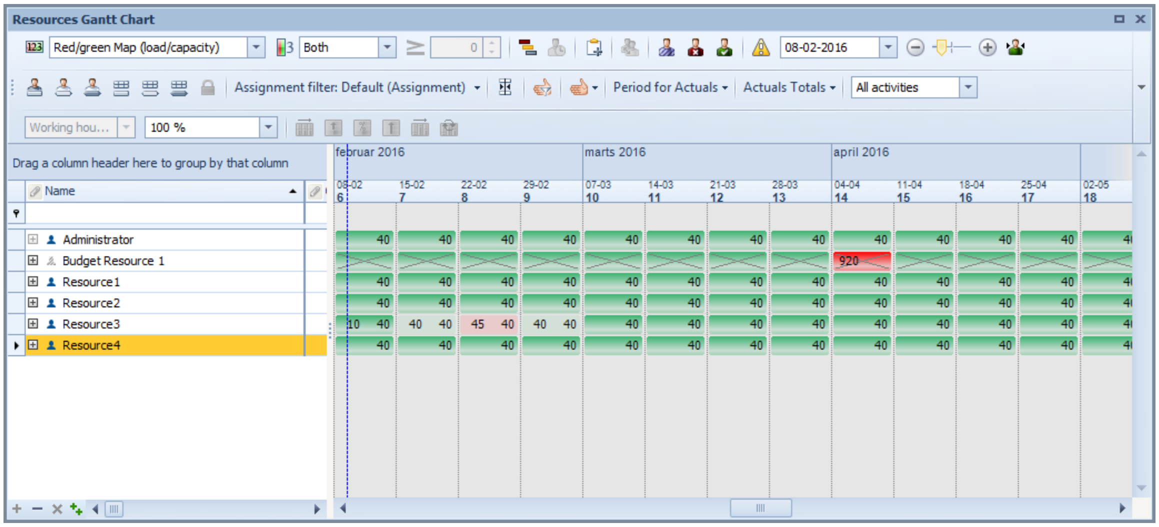
For a description of how to configure which accounts to display, see Accounts.

Use a Less Compact RG

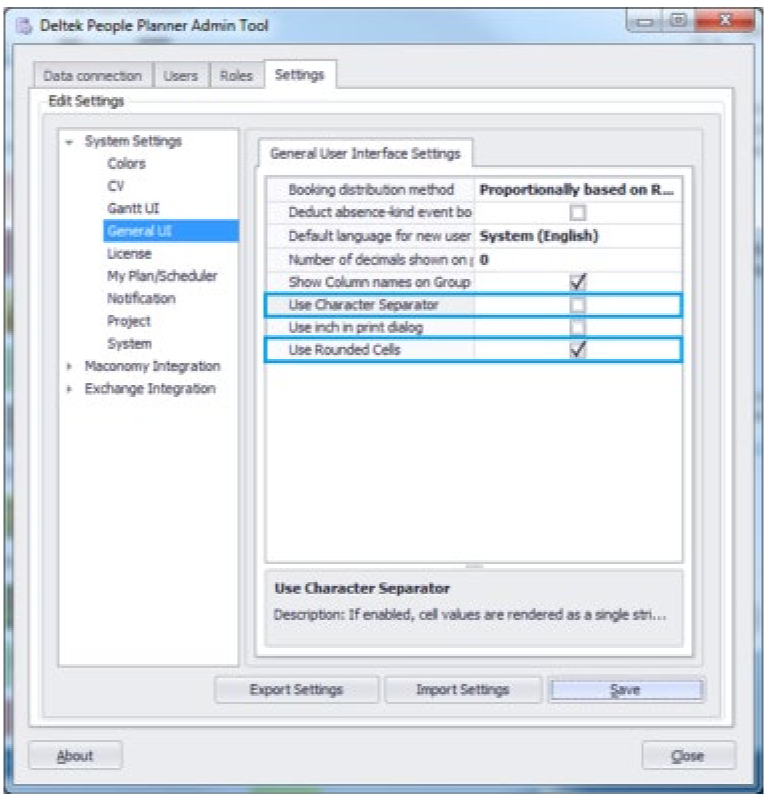
The traditional appearance of the RG has always been compact, as the following figure illustrates.



However, beginning with People Planner 3.6, you can change this to a “lighter” version; the following figure shows an example.



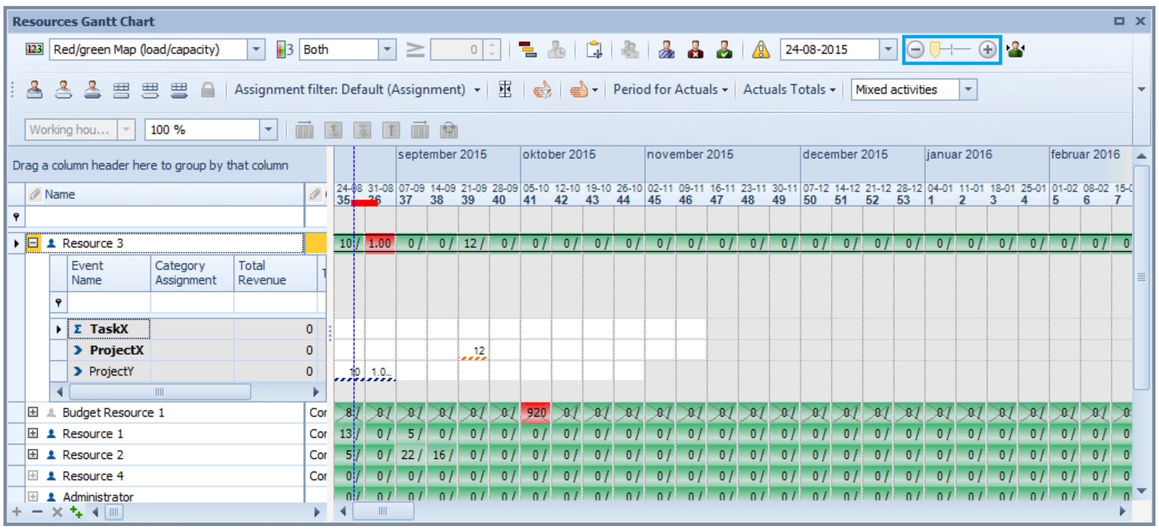
Two settings that were added in People Planner 3.6 enable you to choose this lighter version. You can select these settings in the People Planner Admin Tool, as the following figure shows.



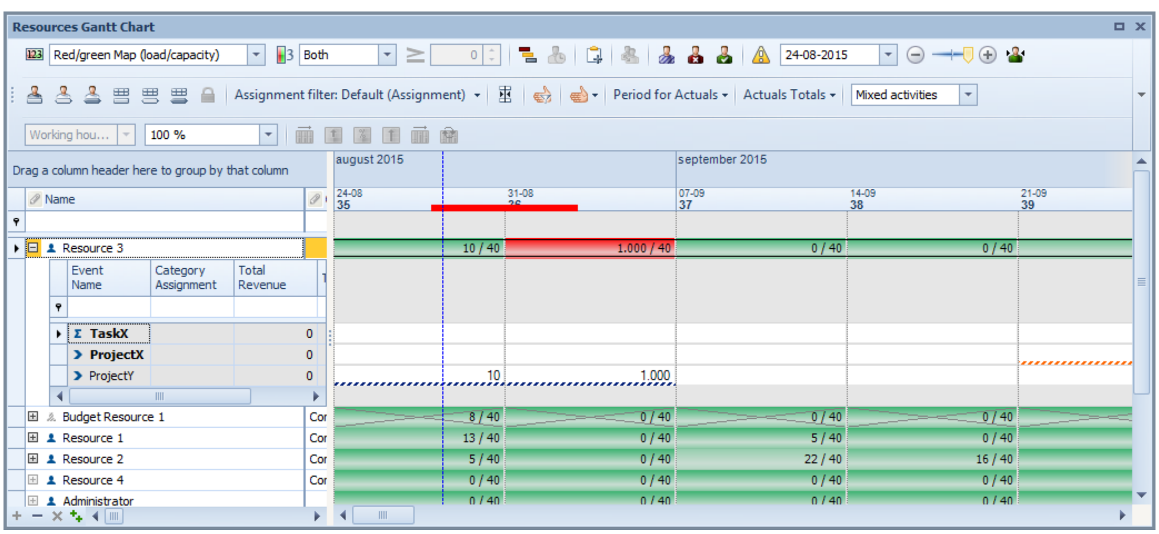
Setting	Description
Use Character Separator	The RG can show up to four accounts at the same time. A "/" character is used by default to separate the account numbers. Select this check box to use the / character as the separator. Deselect this check box to use a space as the separator.
Use Rounded Cells	Select this check box to round the corners of individual cells and add a bit of spacing between them.

Zoom Timescale

This control determines how much space the cells should take up. The following figure shows an example that is zoomed all the way out.



The following is an example that is zoomed all the way in.



You can use this control to ensure that:

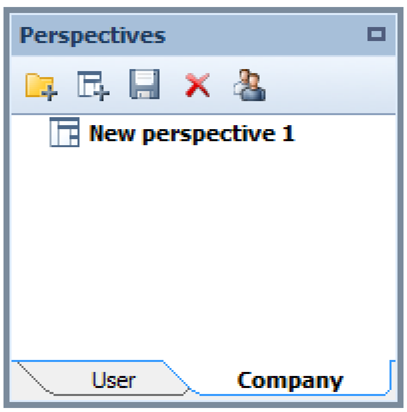
- Numbers are not cut off, and
- Too much space is not used on showing blank space.

Save a Customized View as a Perspective

When you customize a view, you can save the new layout as a perspective. You can even save a setup that contains several views as a perspective.

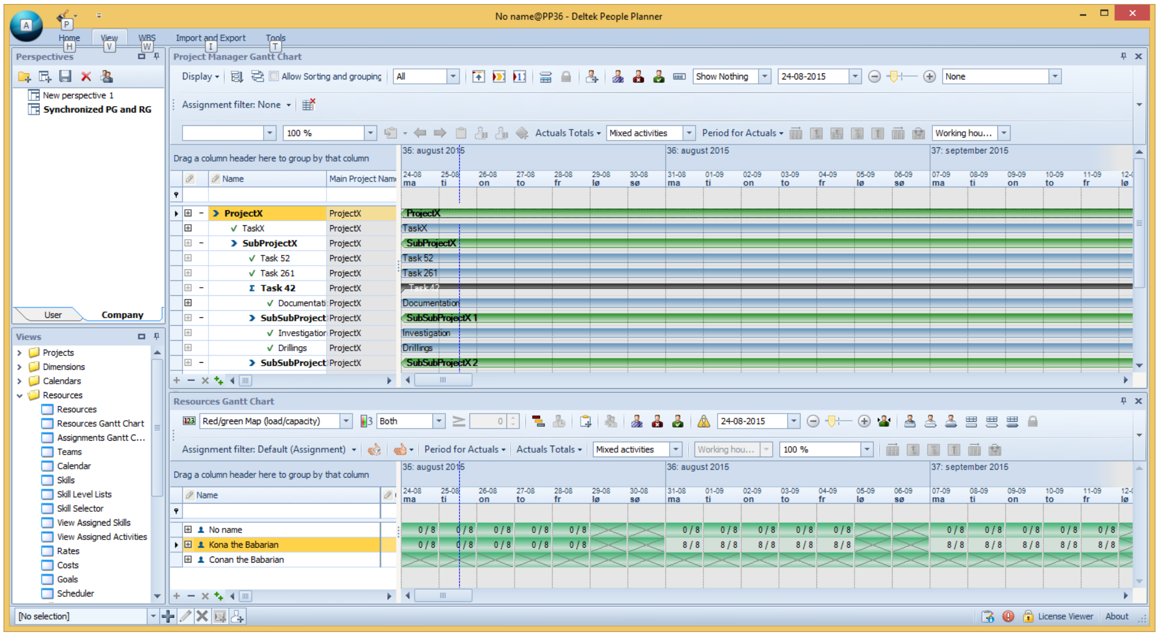
There are two groups of perspectives, **User** and **Company**. The only difference is whether a perspective is intended for the user alone, or it is shared with other users in the company. For Company perspectives, you can also specify which user roles can see the perspective.

Often users do not have access to the individual views, and can only access them through the system's saved perspectives.



The following figure shows a perspective where:

- Both the PG and RG have been added.
- They have been docked, the PG over the RG.
- For both the PG and the RG, the **Synchronize Panes** button has been clicked and then removed (see Synchronize Panes).
- Both the PG and the RG have been set to show the Day view.

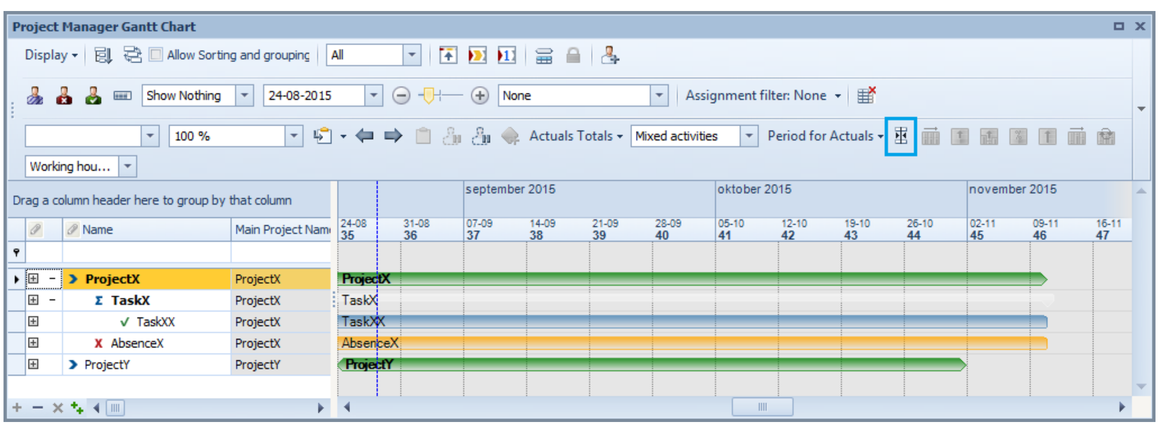


Thus, this figure shows the synchronized PG and RG. See also Main Display Views; main display views can be considered a lightweight form of perspectives.

Synchronize Panes

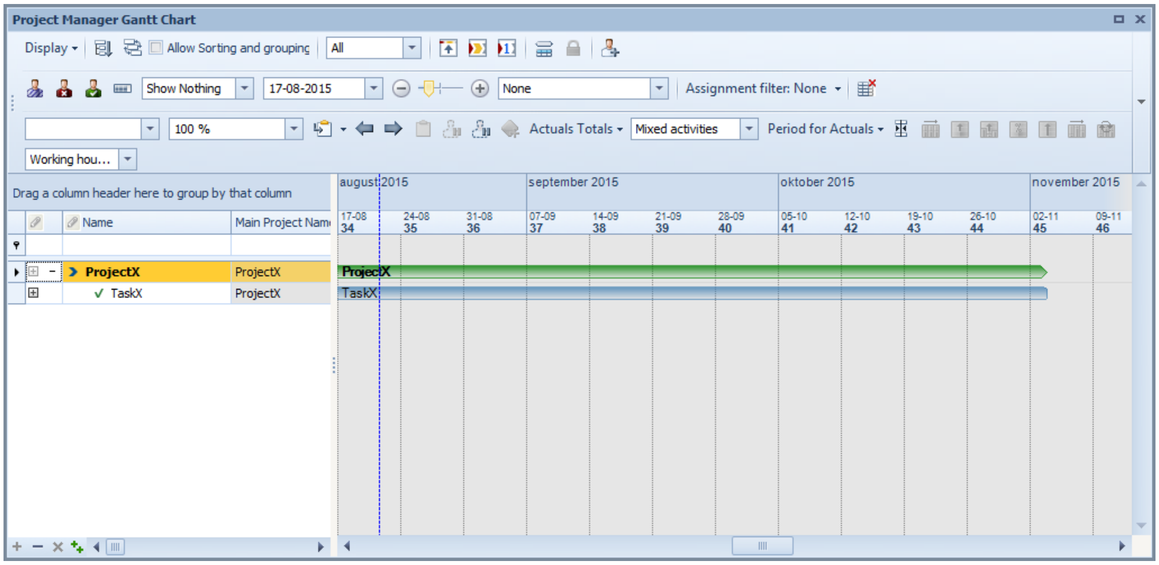
When a perspective contains both a PG and a RG, it is useful to coordinate them so that scrolling on the timeline in one of the Gantt charts automatically causes the other Gantt chart to scroll. You do this by clicking the **Synchronize Panes** button in each of the Gantt charts. That button is highlighted by the blue box in the following figure.

Once you have clicked this button, the Gantt chart for the view will scroll when the counterpart Gantt scrolls. To ensure mutual synchronization, be sure to select the button in both views. (Note that the preceding figure shows an example of a synchronized PG and RG.)



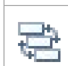
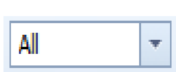
Controls in the Project Manager Gantt Chart

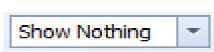
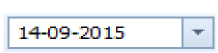
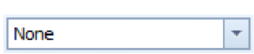
In the following figure, the controls in the Header of the Project Manager Gantt (PG) chart are arranged in four rows, but this arrangement depends on your screen resolution.



Default Controls

The following table lists the controls that are displayed by default. Note that the row numbers in this table refer to the rows in which these controls are grouped in the preceding figure; however, you can arrange these controls in any way that suits you.

Icon	Control	Options	For More Information
Row 1			
	Display	▪ Summation ▪ Aggregation ▪ Value Display ▪ Grouping ▪ Default Layout	Display Settings
	Sort by WBS		Sort by WBS.
	Allow Sorting and Grouping		Grouping
	Show Level		Show Level

Icon	Control	Options	For More Information
	Display Main Project and Its Subprojects		Filter Projects
	Display Selected Project including Subprojects		Filter Projects
	Display Selected Project Excluding Subprojects		Filter Projects
	View Only Projects Related to Selected Assignments		View Only Projects Related to Selected Assignments
	Lock View		Lock View (PG)
	Assign Resource		Assign a Resource to an Existing Event (PG)
Row 2			
	Show Only Tentative		Filter by Approval Status
	Show Only Declined		Filter by Approval Status
	Show Only Approved		Filter by Approval Status
	Show Progress		Show Progress
	Show Resource Names		Show Resource Names
	Navigation Date		Navigation Date
	Zoom Timescale		Zoom Timescale
	Display (Main Display)		Main Display Views of the PG
	Assignment Filter		Filter Assignments
	Settle Close Projects		Open and Closed Projects
Row 3			

Icon	Control	Options	For More Information
	Main Display View		Main Display Views of the PG
100 %	Select Probability Setting		Assign Probability to a Project
	Insert Child Task	• Insert Child Task • Insert Child Milestone • Insert Child Absence	
	Outdent		Move Events
	Indent		Move Events
	Insert Task		Add Event as a Sibling
	Insert Absence		Add Event as a Sibling
	Insert Child Absence		Add Event as a Child
	Insert Milestone		Add Event as a Sibling
	Actuals Totals		Actuals Total
Mixed activities	Activities Types		Activity Types
	Period for Actuals		Set the Period for Actuals
	Synchronize Panes		Synchronize Panes
	Even Allocation		Allocate Hours Evenly
	Book Available Capacity		Allocations (Bookings)
	Book Budget Hours on Available Capacity		Allocations (Bookings)
	Book Full Capacity %		Allocations (Bookings)
	Book Full Capacity		Allocations (Bookings)

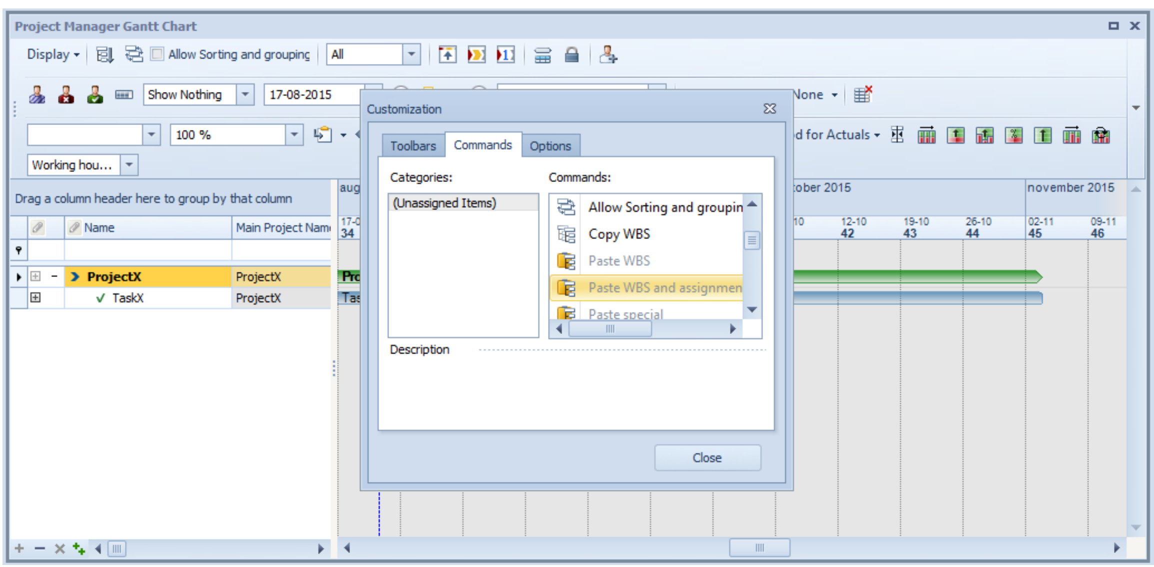
Icon	Control	Options	For More Information
	Book First Available Capacity		[Allocations (Bookings)]
	Book Recurring		[Allocations (Bookings)]
Row 4			
Working hou…	Man Hours (Accounts)		Accounts

Controls That Are Not Shown by Default

Not all of the available controls are shown by default. The following table lists the additional controls that are not shown by default. You can add them by performing the following procedure.

To access controls that are not shown by default:

1. Right-click on the Header in the PG. The shortcut menu opens.
2. Choose **Customize** from the shortcut menu. The **Customize** dialog opens.



3. Do **any** of the following:
   - Drag new controls into the Header.
   - Drag existing controls—that is, rearrange them and/or remove them.
4. Click **Close** when you are done.

You can add any of the following controls.

Icon	Control	For More Information
	Add To-Do	To-Do's
	Copy	Cut/Copy and Paste Allocations
	Copy Assignments	Copy Assignments and Allocations
	Copy Special	Copy Assignments and Allocations and Copy WBS, Assignments, and Allocations
	Copy WBS	Copy WBS, Assignments, and Allocations
	Cut	Cut/Copy and Paste Allocations.
	Find Resource	Find a Resource
	Paste	Cut/Copy and Paste Allocations
	Paste Assignments and Allocations	Copy Assignments and Allocations
	Paste Special	Copy Assignments and Allocations and Copy WBS, Assignments, and Allocations
	Paste WBS	Copy WBS, Assignments, and Allocations
	Paste WBS and Assignments	Copy WBS, Assignments, and Allocations
	Paste WBS, Assignments, and Allocations	Copy WBS, Assignments, and Allocationss
	Show Information	Show Information

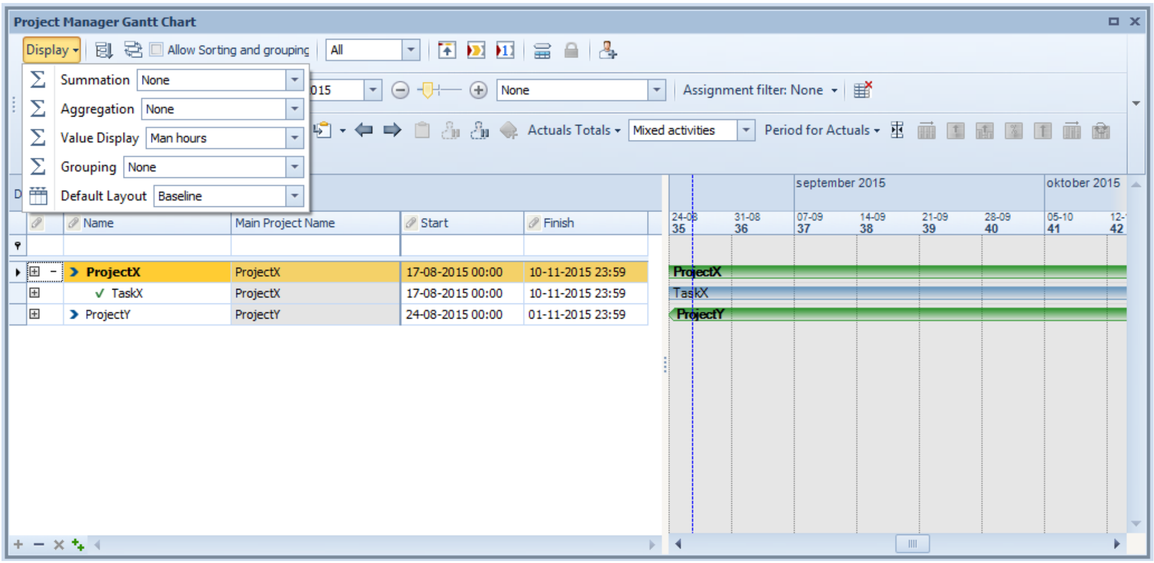
Display Settings

Summation

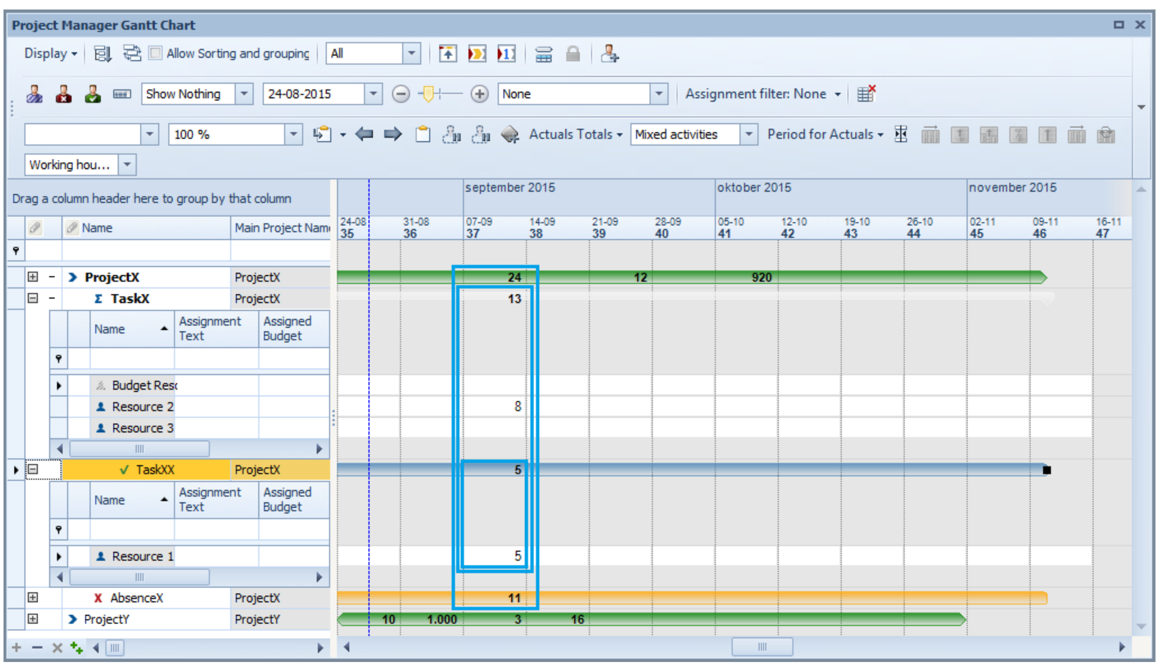
Summation controls how bookings are summed up and displayed directly on the Gantt-bars. Summation can have the following values:

- **None** — Only the event name is shown. This is the default.
- **Direct Only** — Only bookings directly on assignments on the event should be summed on the Gantt bar.

- **Bottom/Up** — Bookings on assignment on the event, as well as bookings on all child events, should be summed on the Gantt bar.



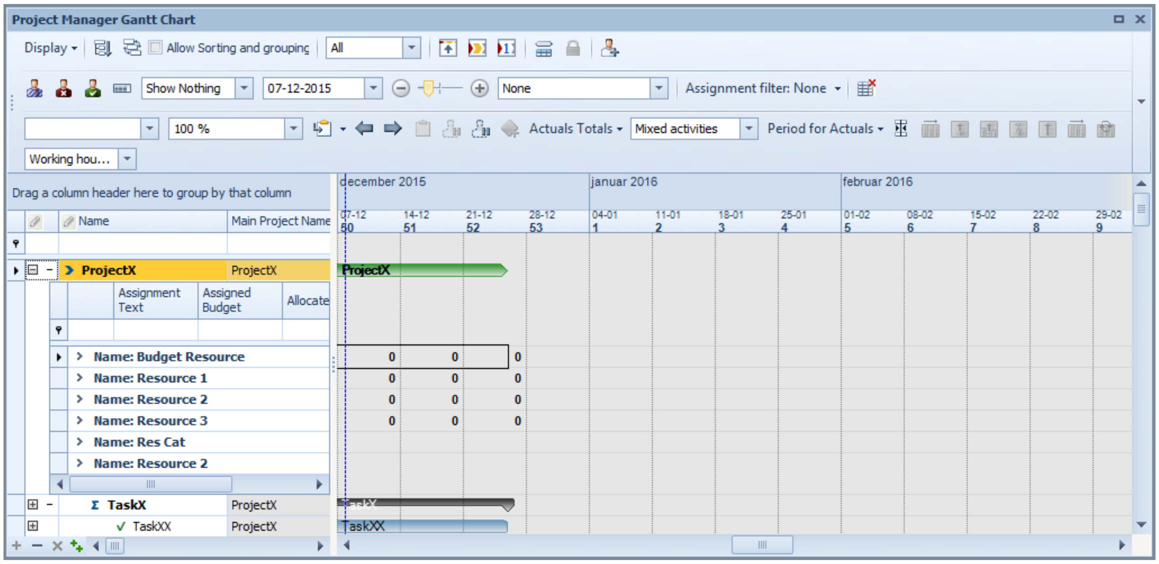
The following is an example of Summation Bottom/Up.



Aggregation

Aggregation determines where assignments are to be displayed. Aggregation has two possible values:

- **None** — Assignments are only shown directly on the events that they belong to.
- **Bottom/Up** — Assignments are shown on all parent events, as well.



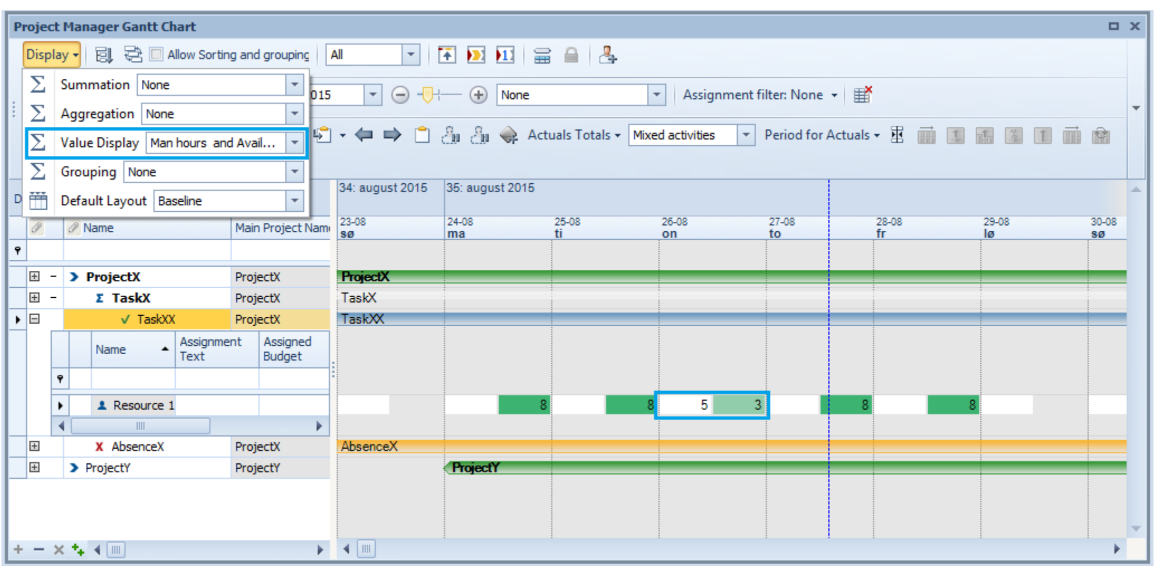
The second option is intended for use when you are only interested in seeing the top levels of a project. For example, you could use it with the Level control (see Show Level).

Value Display

Value Display can have the following values:

- **Man Hours** — This is the default.
- **Man Hours and Available Capacity**

The following shows that available capacity is calculated as total capacity minus the load.



Grouping

Grouping determines what is displayed on the grouping lines in the PG.

Default Layout

Default Layout is a short list of some default setups of columns.

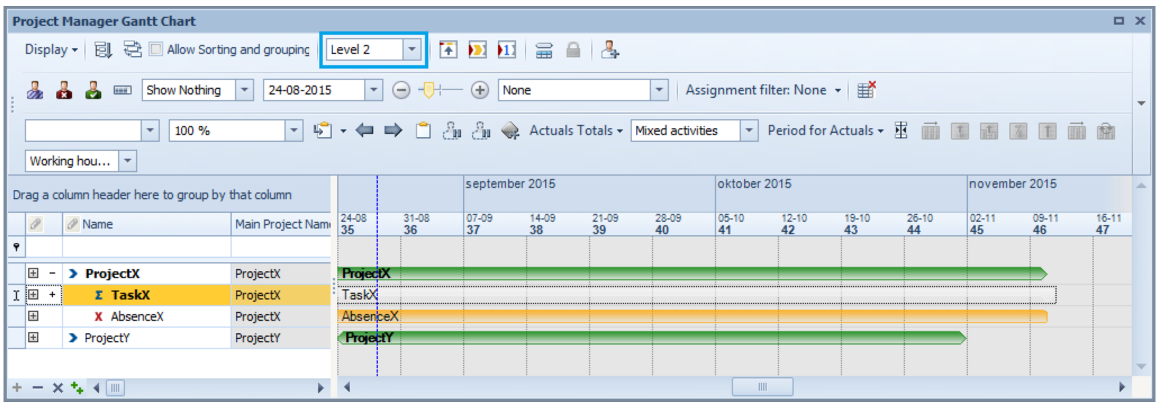
Sort by WBS

Click this button to order the projects and events according to their WBS numbers. See WBS Numbering.

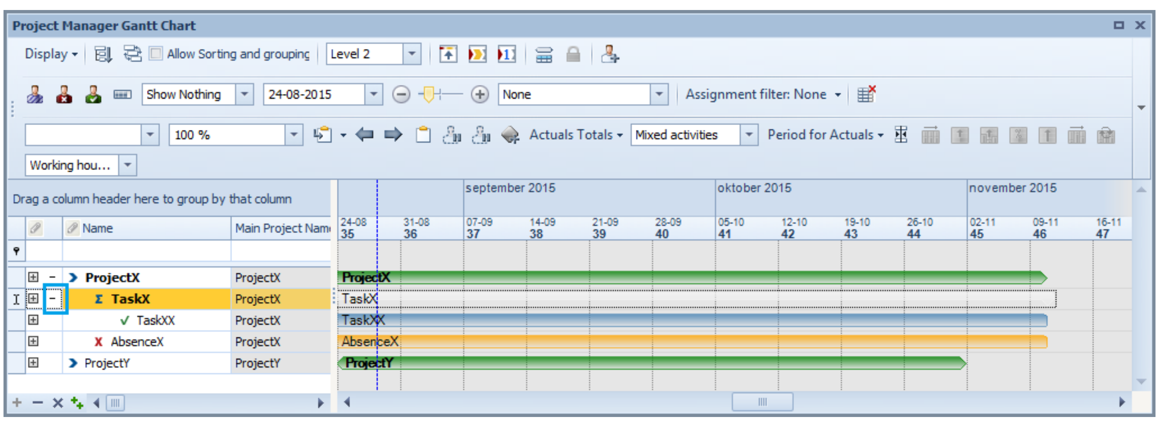
The need for this “master sort” was of more interest in the past, when sorting on individual columns could result in a rather jumbled ordering of events in the PG.

Show Level

This control collapses the WBS to a certain level for a better overview, as shown in the following example of the WBS collapsed to level 2.

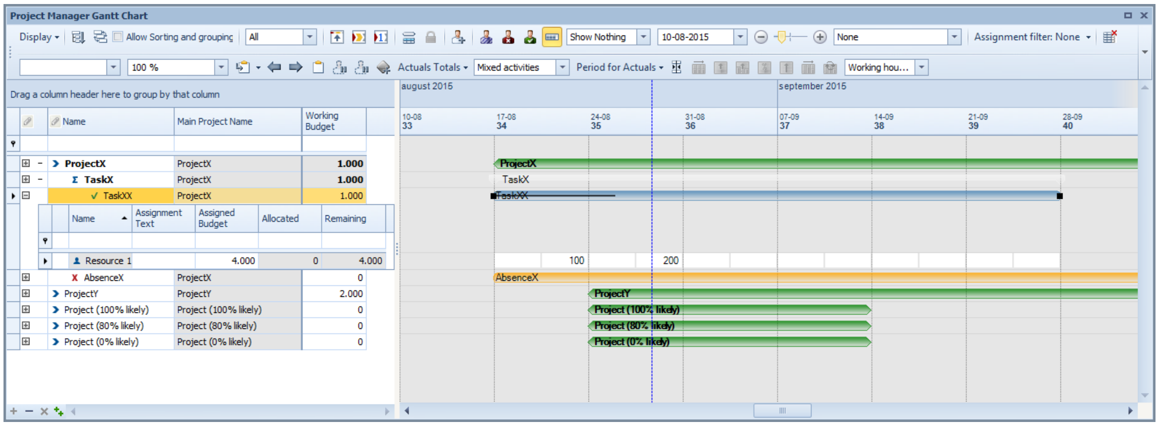


You can expand or collapse the WBS of individual events by clicking the small **+** / **–** button in the first column of the PG, highlighted by the blue box in the following example.



Show Progress

Click the **Show Progress** button to display a bar down the middle of the Gantt bar. The following example shows progress of not quite 30% in TaskXX.



Requirements:

- The task must have a budget; that is, Working Budget must have a value of more than 0 hours.
- There must be actuals, such as time registrations, on the task.

The progress is calculated as the actuals in the “period until now,” compared to the budgeted hours. The progress is indicated with a thin line the length of the Gantt bar. The length of the line represents a percentage; that is, 100% progress is indicated with a line the full length of the Gantt bar.

The progress can be directly compared to the blue date line; if the progress line lags behind the date line, the project is lagging behind.

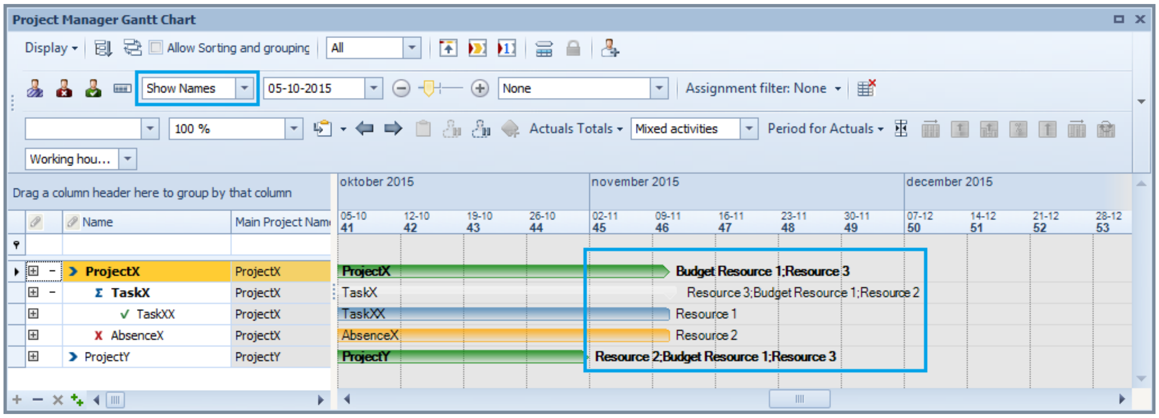
Note that only the time registrations in the Period of Actuals (see Period for Actuals) are included in the calculation.

Show Resource Names

This control is a drop-down list that has the following values:

- Show Nothing
- Show Names
- Show Initials

This control determines whether the assigned resources should be listed at the end of the Gantt bar. This control is highlighted by a blue box in the following example.

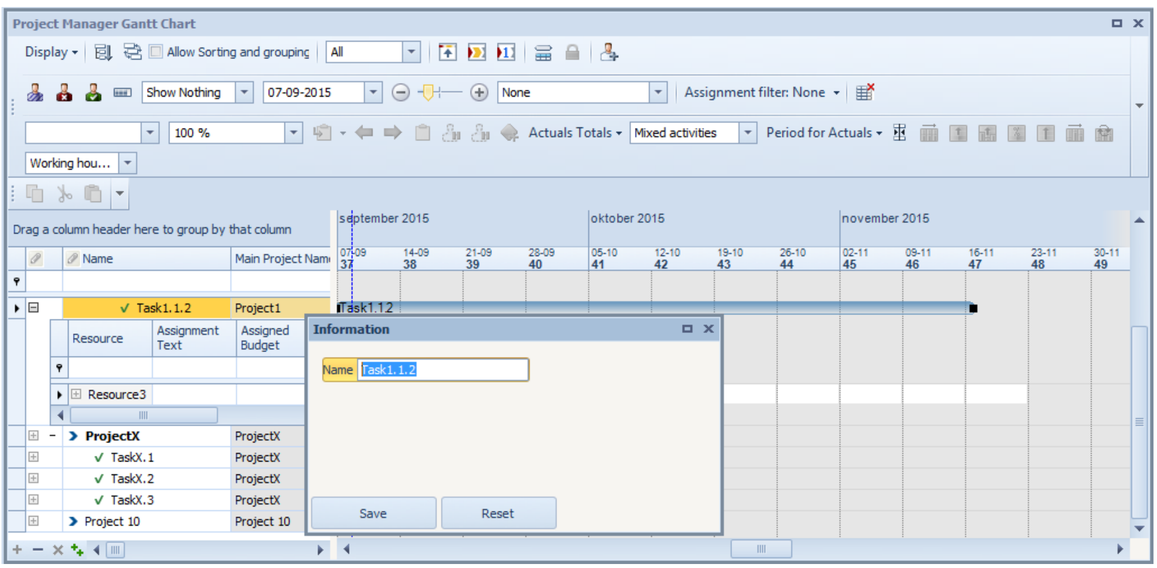


Show Information

The **Show Information** control displays a small window with information about an event.

To use the Show Information control:

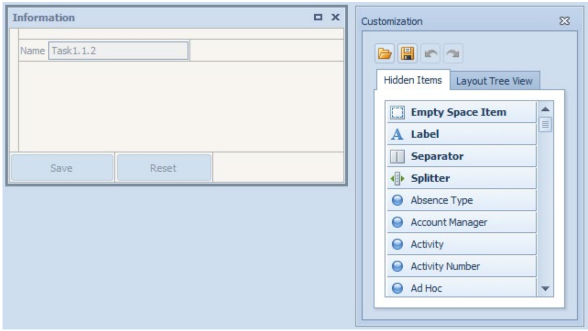
1. Right-click on the event to access the shortcut menu.
2. Choose **Show Information** from the shortcut menu.



By default, the Show Information view simply shows the basic information about the event. However, you can configure it, and when saved as a part of a perspective, it retains that configuration.

To configure the Show Information view:

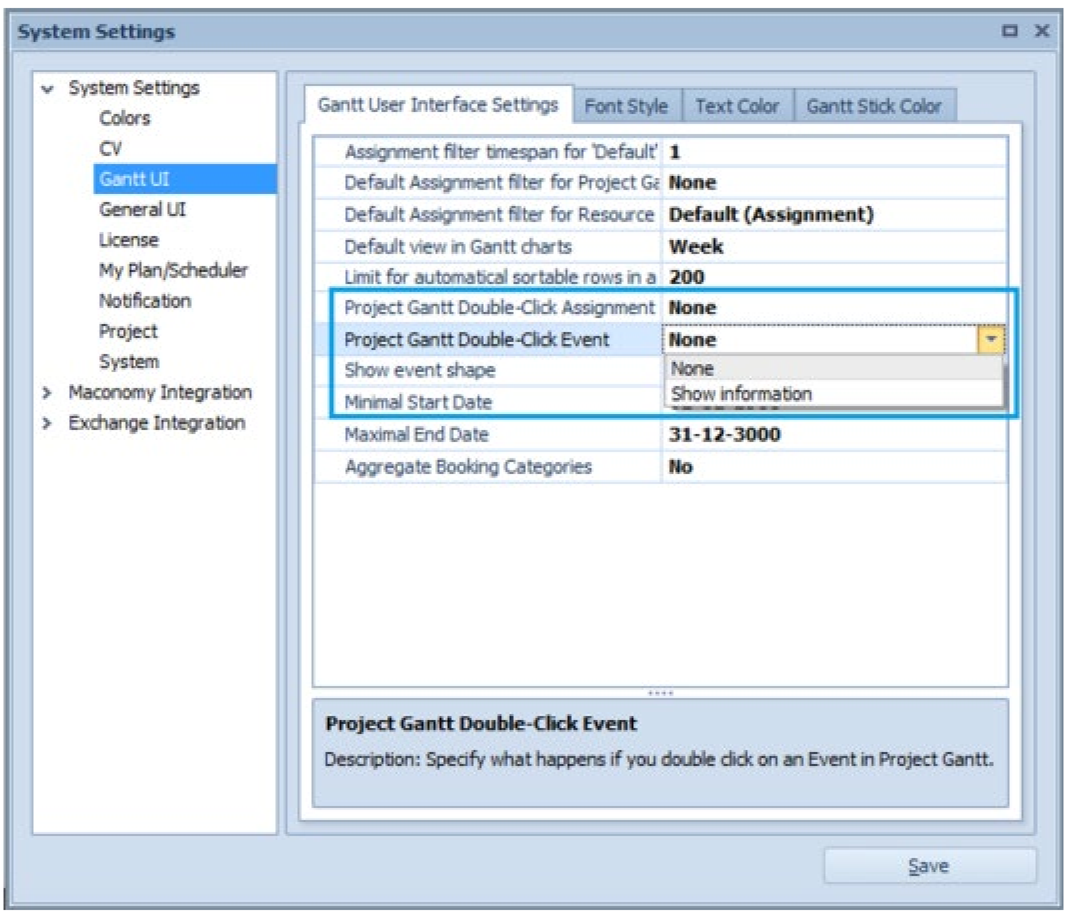
1. Right-click on the **Show Information view** to access the shortcut menu.
2. Choose **Customize Layout**. The following dialog opens.



3. Drag the controls that you want onto the Information view.
4. Close the Customization view.
5. Close the Information view.
6. Save the PG as part of a perspective.

Configuring When to Show Information

In older versions of People Planner, you could open the Show Information view by double-clicking the event. Because some users found this to be annoying if it happened accidentally, this has changed so that you can configure this from the System Settings, as the following figure shows.



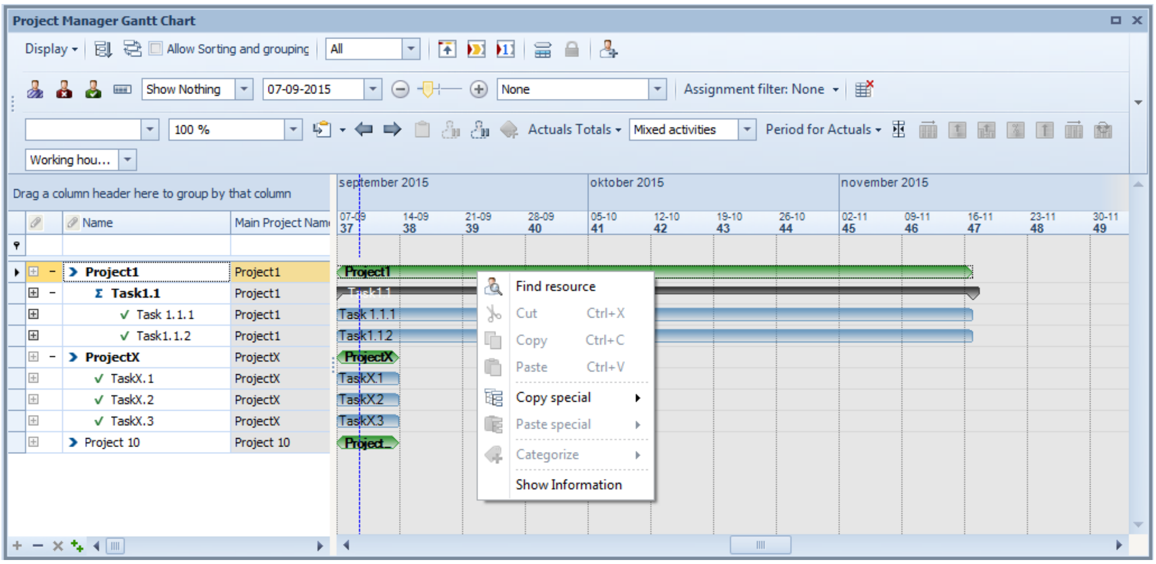
Shortcut Menus in the PG

Some functionality is also available through the various shortcut menus in the PG. Right-click an event, assignment, cell, and so on, to display its shortcut menu.

In future releases of People Planner, plans are to replicate more functionality in the shortcut menus, where they are closer to the data that they involve.

Event Shortcut Menu

The following figure shows an example of the event shortcut menu.

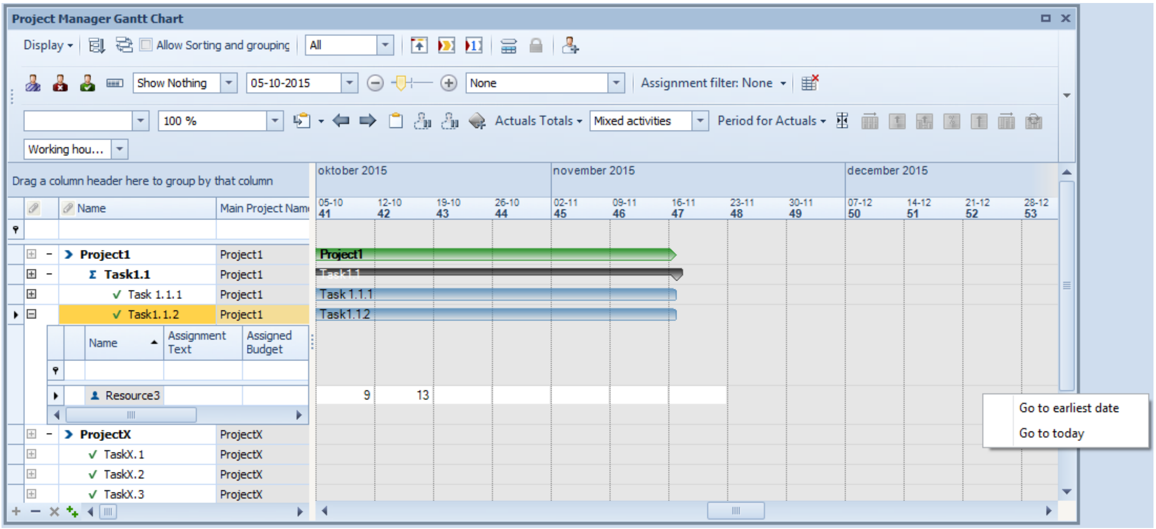


This shortcut menu provides the following options.

Icon	Control	For More Information
	Find Resource	Find a Resource
	Cut	Cut/Copy and Paste Allocations
	Copy	Cut/Copy and Paste Allocations
	Paste	Cut/Copy and Paste Allocations
	Copy Special	Copy Assignments and Allocations and Copy WBS, Assignments, and Allocations
	Paste Special	Copy Assignments and Allocations and Copy WBS, Assignments, and Allocations
	Categorize	Booking Categories
	Show Information	Show Information

Assignment Shortcut Menu (Outside of Active Period)

Right-click an assignment outside of its active period to display a navigation shortcut menu, as the following figure shows.

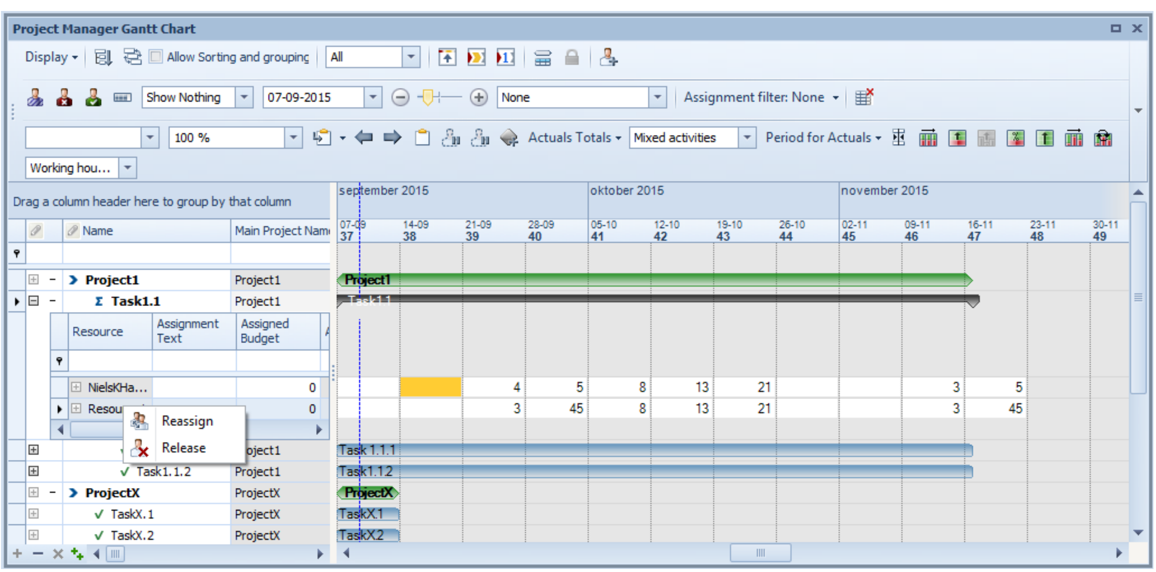


This shortcut menu provides the following options.

Control	For More Information
Go to Earliest Date	Go to Earliest Date
Go to Today	Go to Today

Assignment Shortcut Menu (Inside of Active Period)

Right-click an assignment in the grid part to display a shortcut menu, as the following figure shows.

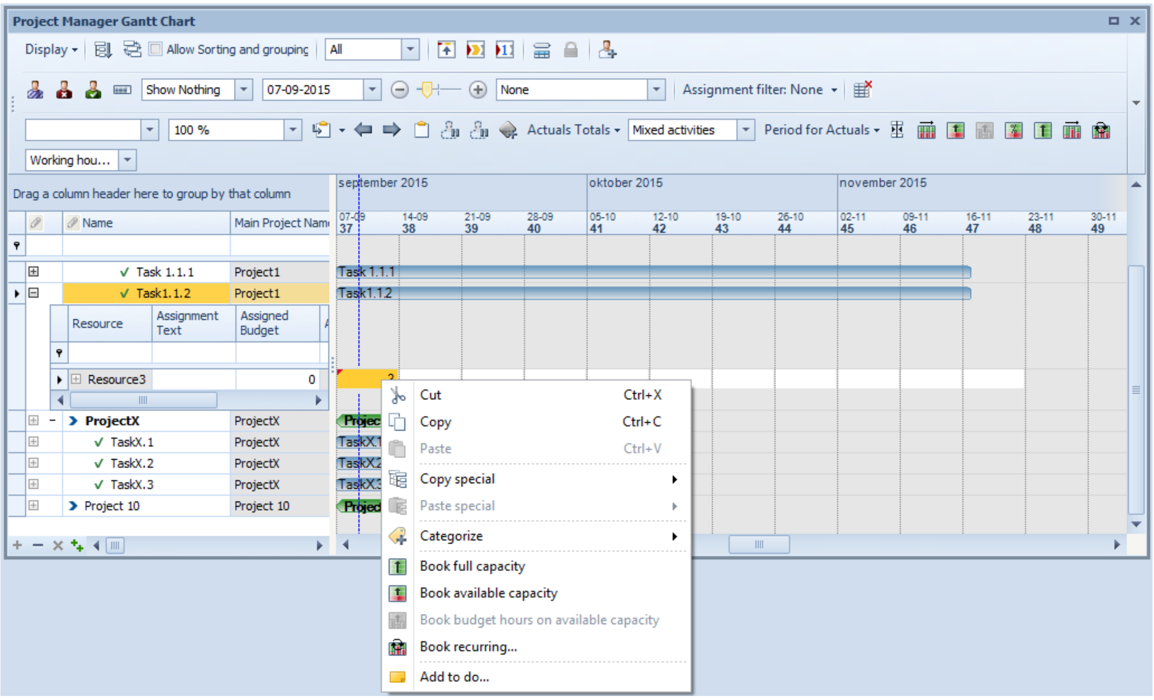


This shortcut menu provides the following options.

Icon	Control	For More Information
	Reassign	Reassign an Event from One Resource to Another
	Release	Release a Resource from an Event

Cell Shortcut Menu

Right-click a cell to display its shortcut menu, as the following figure shows.



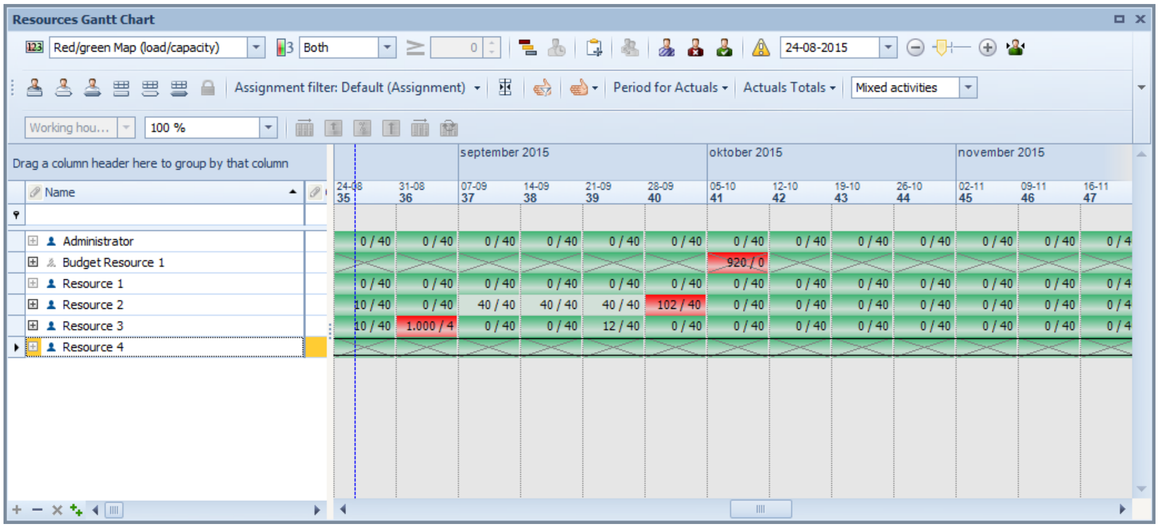
This shortcut menu provides the following options.

Icon	Control	For More Information
	Cut	Cut/Copy and Paste Allocations
	Copy	Cut/Copy and Paste Allocations
	Paste	Cut/Copy and Paste Allocations
	Copy Special	Copy Assignments and Allocations and Copy WBS, Assignments, and Allocations
	Paste Special	Copy Assignments and Allocations and Copy WBS, Assignments, and Allocations

Icon	Control	For More Information
	Categorize	Booking Categories
	Book Full Capacity	Book Full Capacity
	Book Available Capacity	Book Remaining Available Capacity
	Book Budget Hours on Available Capacity	Book Budgeted Hours on Available Capacity
	Book Recurring	Book Recurring
	Add To-Do	To-Do's

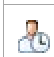
Controls in the Resource Gantt Chart

The controls are at the top of the Resource Gantt (RG) chart. In the following figure, they are arranged in three rows, but this arrangement depends on your screen resolution.

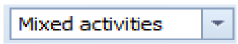


Default Controls

The following table lists the controls that are displayed by default. Note that the row numbers in this table refer to the rows in which these controls are grouped in the preceding figure; however, you can arrange these controls in any way that suits you.

Icon	Control	For More Information
Row 1		
	Display (Main Display)	Main Display Views of the RG
	Show Graphic/Value	Show Graphic/Value
	Threshold	Threshold
	Show Activities	Show Activities/Show Bookings
	Show Bookings	Show Activities/Show Bookings
	Assign Task/Project	Assign a Resource on an Existing Event (RG)
	Reassign Other Resource	Reassign an Event from One Resource to Another
	Show Only Tentative	Filter Assignments

Icon	Control	For More Information
	Show Only Declined	Filter Assignments
	Show Only Approved	Filter Assignments
	Show Overlap	Show Overlap
	Navigation Date	Navigation Date
	Zoom Timescale	Zoom Timescale
	Show Availability	Show Availability
Row 2		
	View Only Resources Assigned to Selected Events	View Only Resources Assigned to Selected …
	View Only Resources Assigned to Selected Projects	View Only Resources Assigned to Selected …
	View Only Resources Assigned to Selected Projects and Subprojects	View Only Resources Assigned to Selected …
	View Only Assignments for Selected Events	View Only Assignments for Selected …
	View Only Assignments for Selected Projects	View Only Assignments for Selected …
	View Only Assignments for Selected Projects and SubProjects	View Only Assignments for Selected …
	Lock View	Lock View (RG)
	Assignment Filter	Filter Assignments
	Synchronize Panes	Synchronize Panes
	Matching Skills	Assign Skills to Resources
	Show Skills	Assign Skills to Resources
	Period for Actuals	Set the Period for Actuals

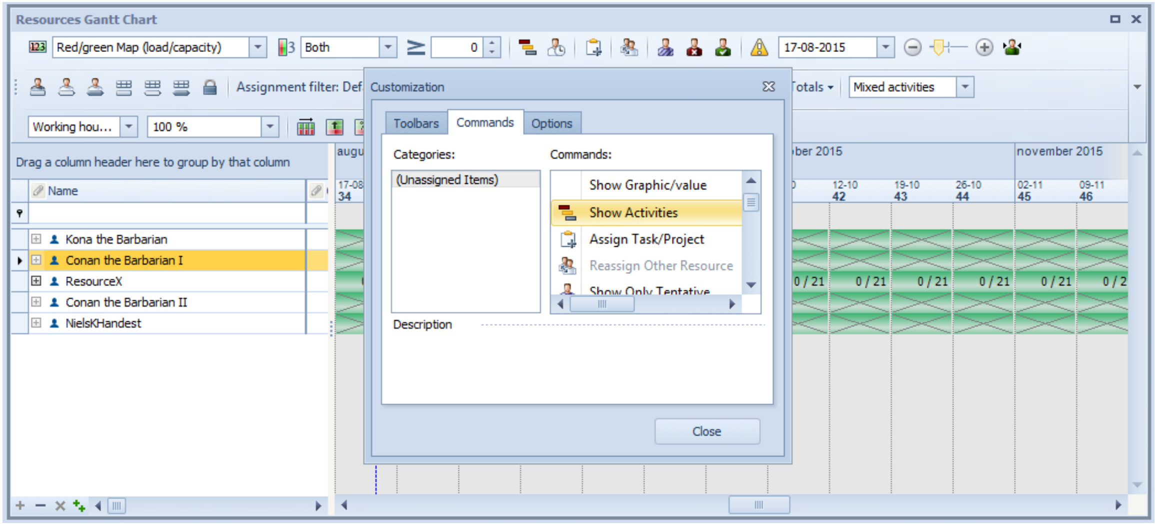
Icon	Control	For More Information
	Actual Totals	Actuals Total
	Activity Types	Activity Types
	Period for Actuals	Set the Period for Actuals
Row 3		
	Accounts	Accounts
	Select Probability Setting	Assign Probability to a Project
	Even Allocation	Allocations (Bookings)
	Book Available Capacity	Allocations (Bookings)
	Book Full Capacity %	Allocations (Bookings)
	Book Full Capacity	Allocations (Bookings)
	Book First Available Capacity	Allocations (Bookings)
	Book Recurring	Allocations (Bookings)

Controls That Are Not Shown by Default

Not all of the available controls are shown by default. The following table lists the additional controls that are not shown by default. You can add them by performing the following procedure.

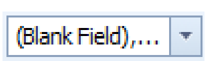
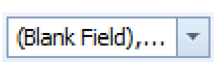
To access controls that are not shown by default:

1. Right-click on the Header in the RG. The shortcut menu opens.
2. Choose **Customize** from the shortcut menu. The **Customize** dialog opens.



3. Do **either** of the following:
   - Drag new controls into the Header.
   - Drag existing controls—that is, rearrange them and/or remove them.
4. Click **Close** when you are done.

You can add any of the following controls.

Icon	Control	For More Information
	Project Status Filter	Project Status, Type, and Group
	Project Type Filter	Project Status, Type, and Group
	Project Group Filter	Project Status, Type, and Group
	Summarize Only Filtered Resources	Sum when Filtering
	Copy	Cut/Copy and Paste Allocations
	Cut	Cut/Copy and Paste Allocations
	Paste	Cut/Copy and Paste Allocations
	Add To-Do	To-Do's
	Approve Bookings	Approval Workflow for Bookings

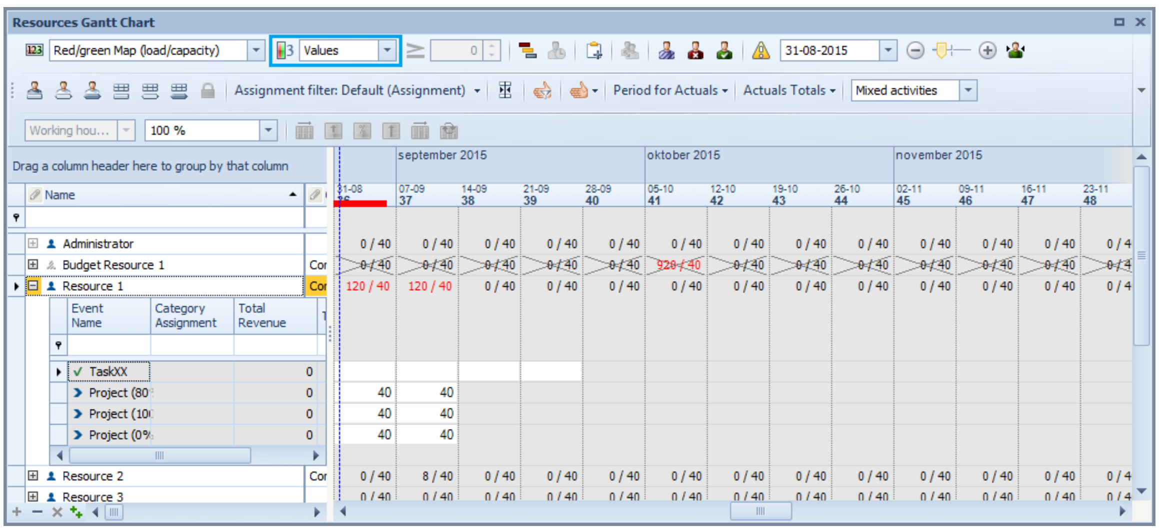
Icon	Control	For More Information
	Decline Bookings	Approval Workflow for Bookings

Show Graphic/Value

This control determines whether the Diagram part should show color coding and/or the values of the bookings. It is a drop-down list that can have these possible values:

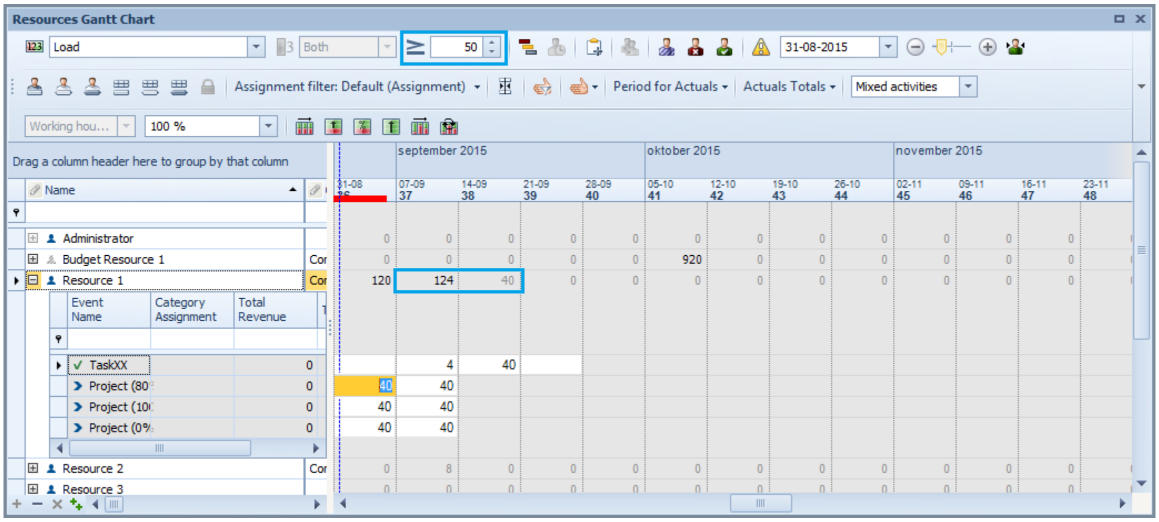
- Graphical
- Values
- Both

In the following example, the RG shows only the values, and none of the color coding (graphical elements).



Threshold

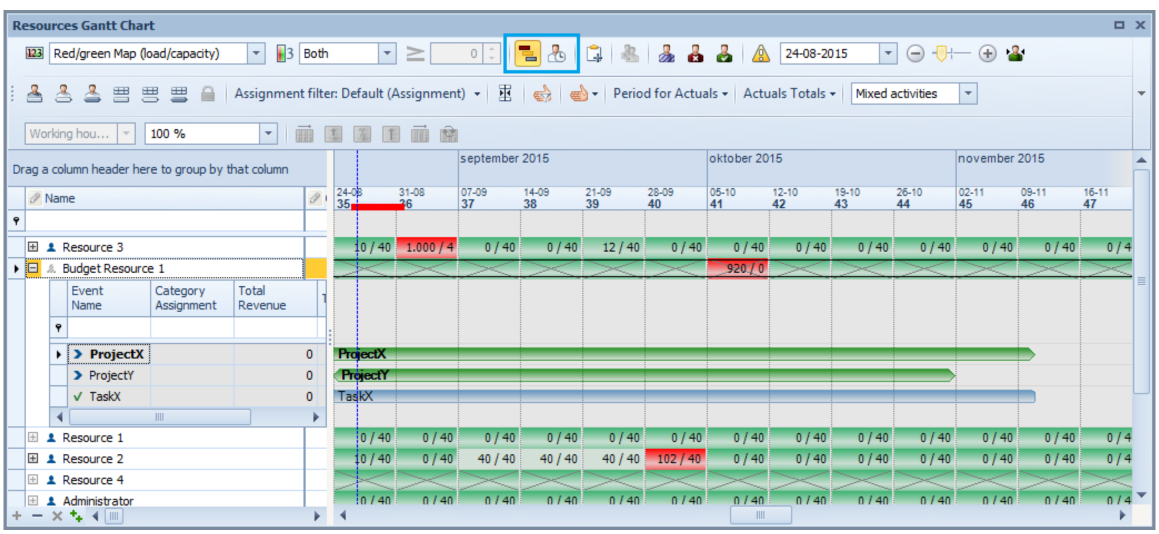
With this control, the numbers in the RG are displayed in bold if they are over the selected threshold value. In the following example, values that are equal to or over 50 hours are shown in bold.



The **Threshold** control is only enabled when the RG is displaying a single account.

Show Activities/Show Bookings

Usually the RG shows the booking cells. Click the **Show Activities** button to show the Gantt bars instead.

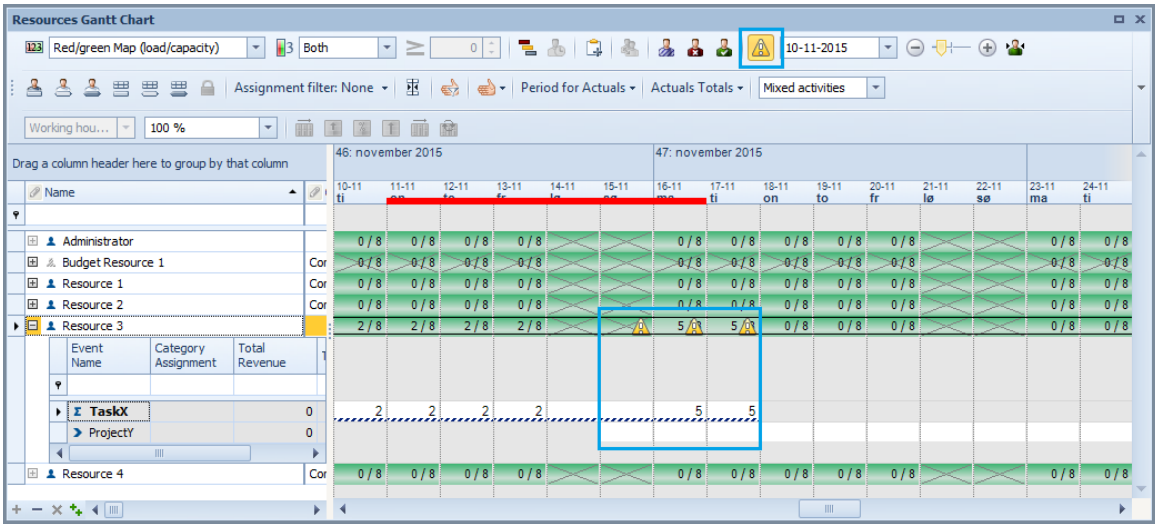


When you click the **Show Activities** button, the **Show Bookings** button is enabled. Click the **Show Bookings** button to display the numbers of the bookings superimposed on top of the Gantt bar instead of showing the Event name.

Show Overlap

This control highlights whether a resource has overlapping assignments.

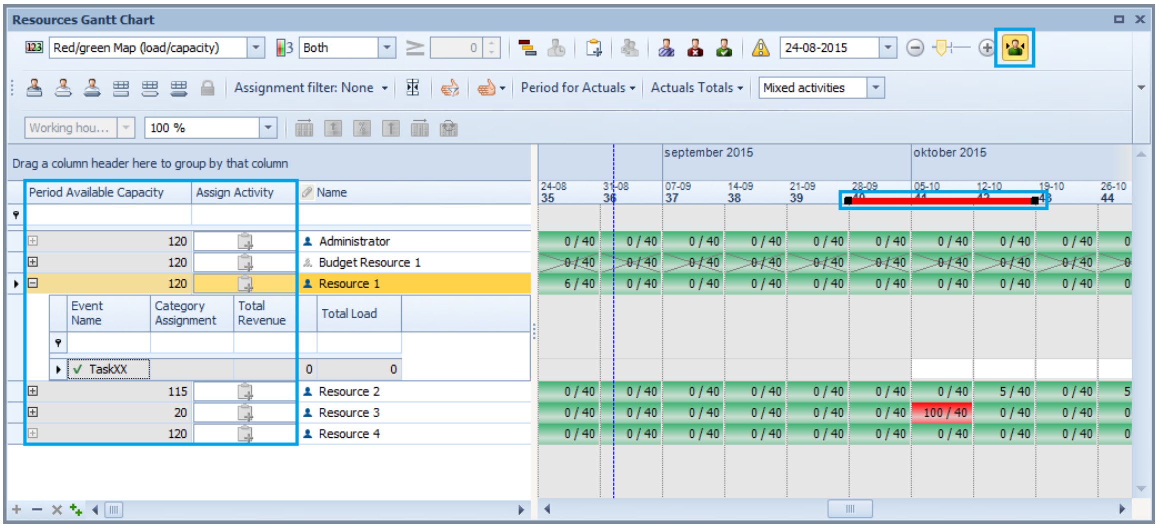
If a resource is assigned to two or more tasks on the same project, it is not considered overlapping. However, it is overlapping if the resource is assigned on tasks on different projects. The following example shows that Resource 3 has overlapping assignments on TaskX and ProjectY.



Show Availability

Click the **Show Availability** button to:

- Add two columns: **Period Available Capacity** and **Assign Activity**. The Assign Activity column is only useful when the RG is paired with a PG. In that case you can select an event in the PG and then click the button in the column to assign the resource to the event.
- Add a red bar in the timescale of the Diagram part to represent the timescale. Two handles appear when you click the bar, and you can use them to resize the period. The Period Available Capacity column is then updated with the available capacity for that period.



In this example, a period of 3 weeks is selected for a total of 120 hours. Resource 3 has already been booked for 100 hours in this period, thus the available capacity is 20.

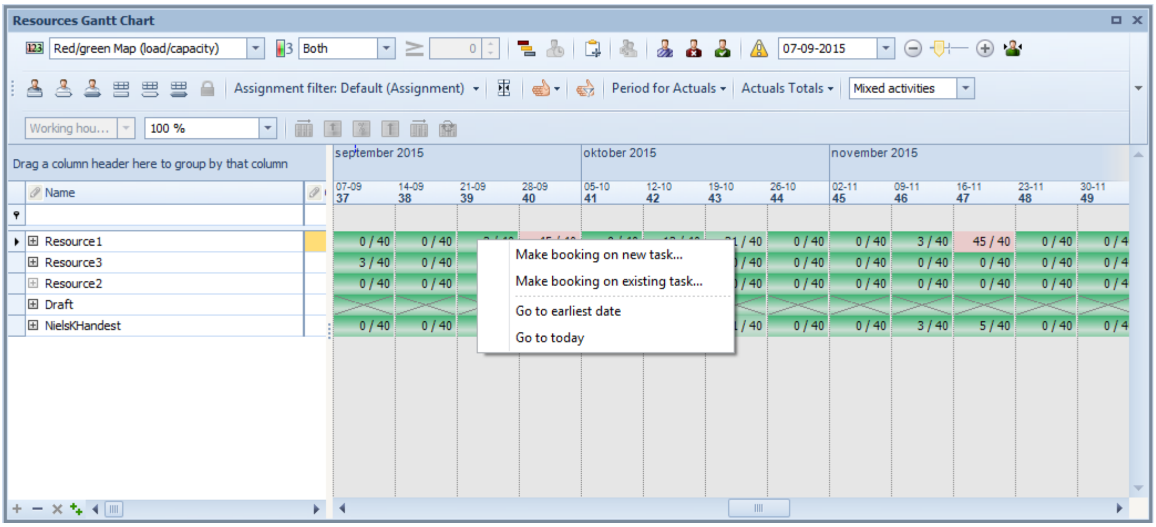
Shortcut Menus in the RG

Some functionality is also available through the various shortcut menus in the RG. Right-click a resource, assignment, or cell to display its shortcut menu.

Plans are to replicate more functionality in the shortcut menus, where they are closer to the data that they involve.

Resource Shortcut Menu

Right-click a resource in the Diagram part to display its shortcut menu, as the following figure shows.

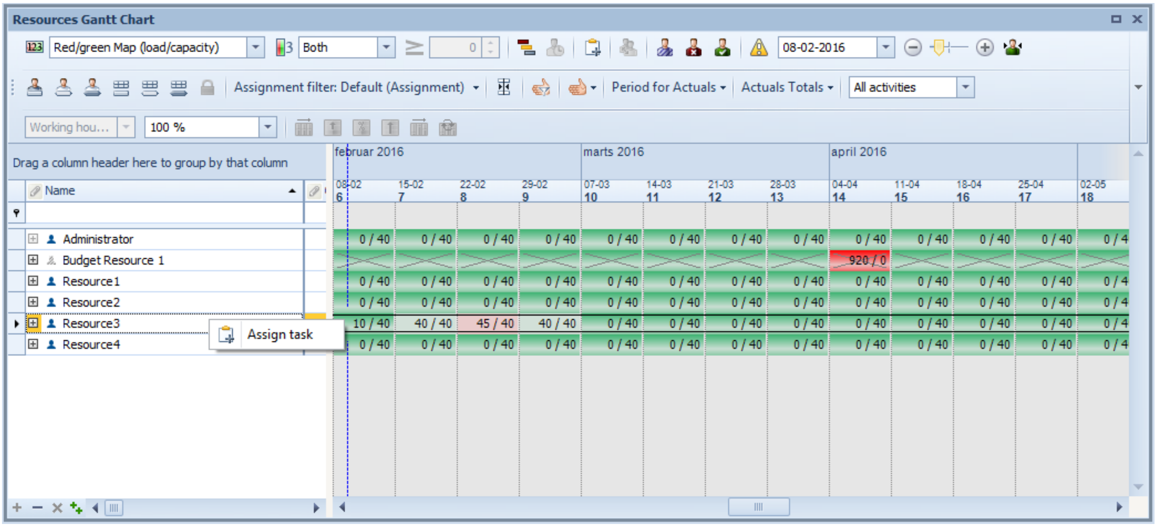


This shortcut menu provides the following options.

Control	For More Information
Make Booking on New Task	Assign a Resource to a New Event
Make Booking on Existing Task	Assign a Resource on an Existing Event (RG)
Go to Earliest Date	Go to Earliest Date
Go to Today	Go to Today

Assignment Shortcut Menu (Grid)

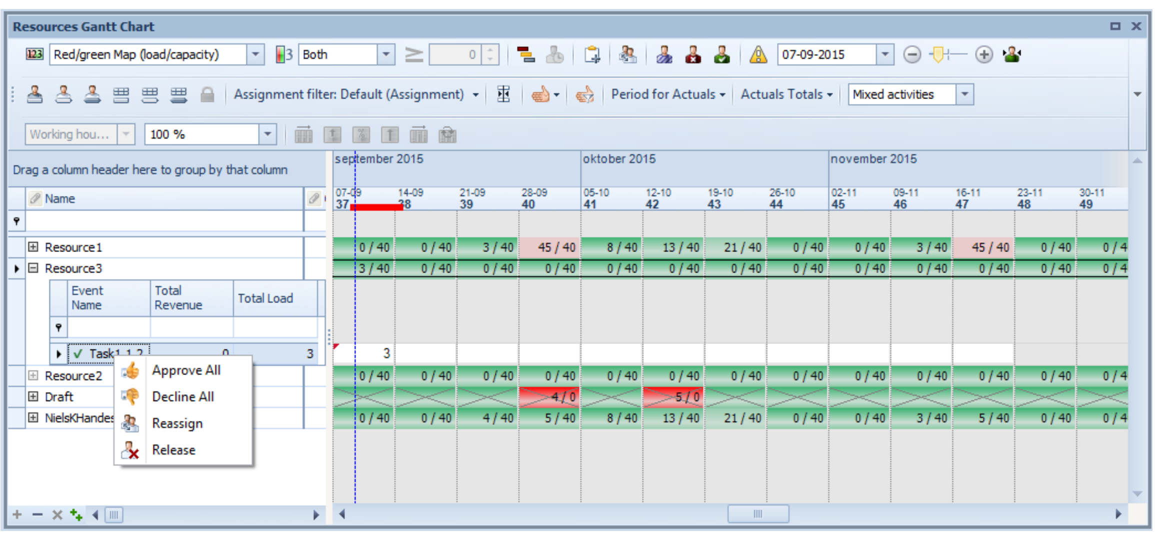
Right-click a resource in the Grid part to display its shortcut menu. The following figure shows this.



Icon	Control	For More Information
	Assign Task	Assign a Resource to a New Event (RG)

Assignment Shortcut Menu (Sub-Grid)

Right-click an assignment in the Grid part to display its shortcut menu, as the following figure shows.

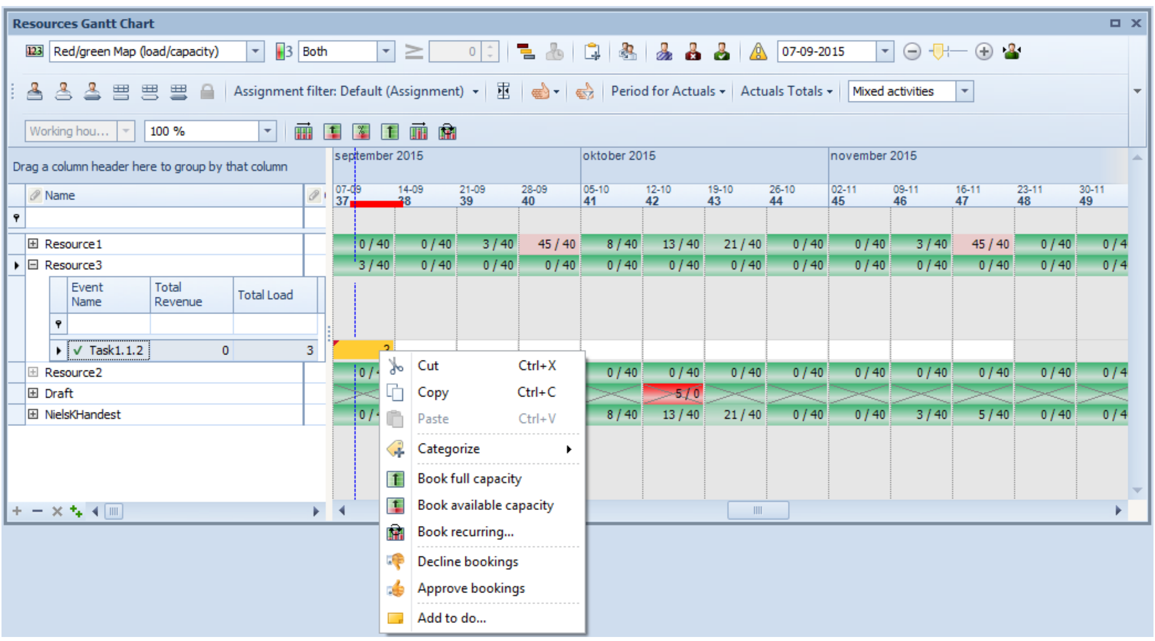


This shortcut menu provides the following options.

Icon	Control	For More Information
	Approve All	Approve and Decline Bookings
	Decline All	Approve and Decline Bookings
	Reassign	Reassign an Event from One Resource to Another
	Release	Release a Resource from an Event

Cell Shortcut Menu

Right-click a cell in the Diagram part to display its shortcut menu, as the following figure shows.



This shortcut menu provides the following options.

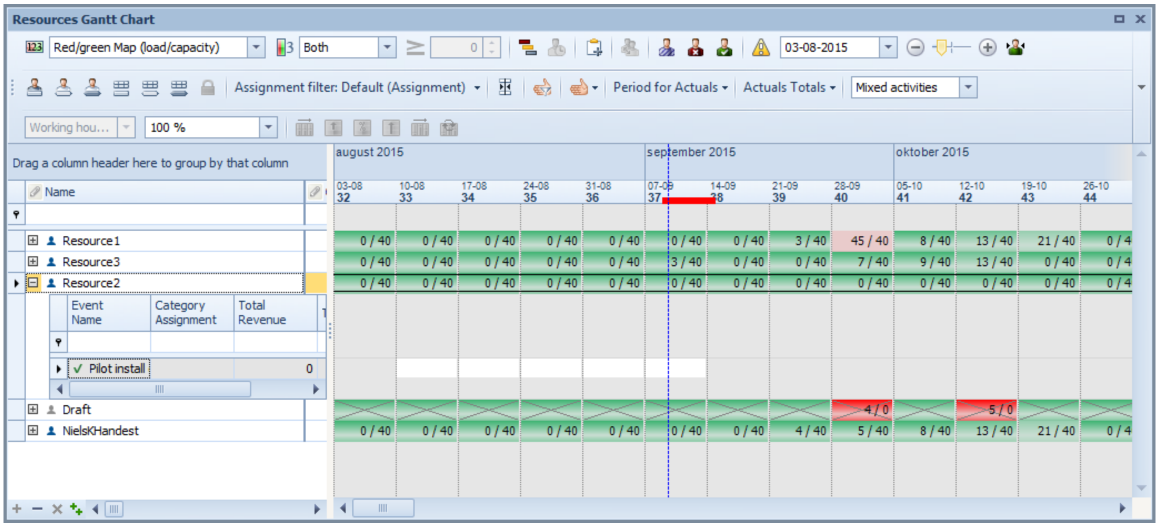
Icon	Control	For More Information
	Cut	Cut/Copy and Paste Allocations
	Copy	Cut/Copy and Paste Allocations
	Paste	Cut/Copy and Paste Allocations
	Categorize	Booking Categories

Icon	Control	For More Information
	Book Full Capacity	Book Full Capacity
	Book Available Capacity	Book First Available Capacity
	Book Recurring	Book Recurring
	Decline Bookings	Approve and Decline Bookings
	Approve Bookings	Approve and Decline Bookings
	Add To-Do	To-Do’s

Navigating to a Date in the PG and RG Charts

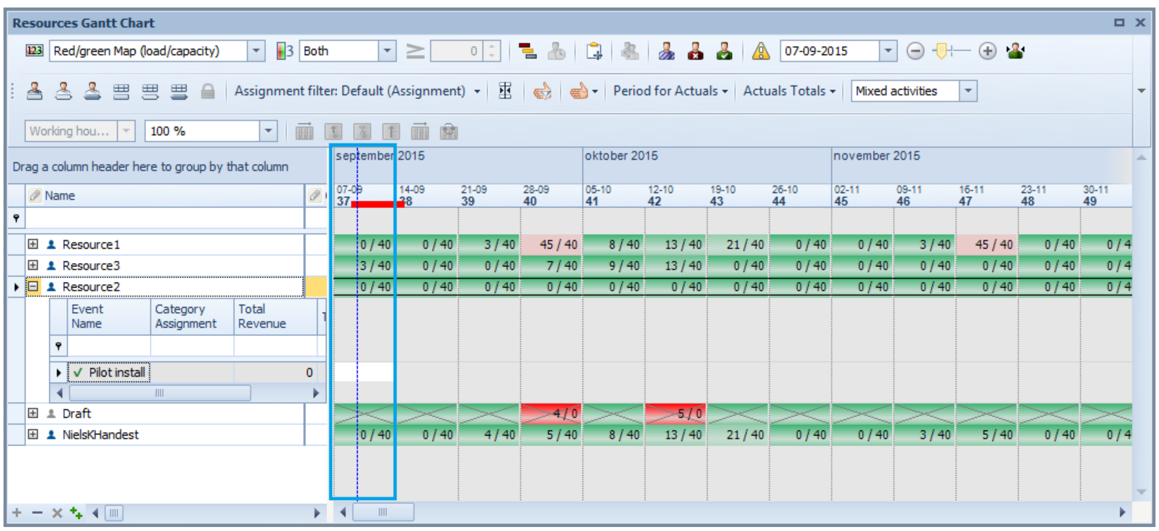
Go to Earliest Date

This Diagram shortcut menu function scrolls the PG or RG to display the start of the assignment at the left edge of the visible period. In the following example in the RG, Go to Earliest Date was used on the “Pilot install W0” task, and then scrolled one period more to the left.



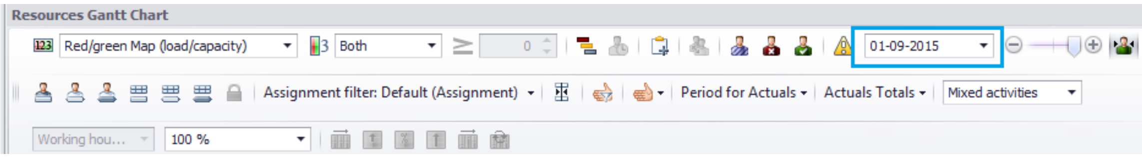
Go to Today

This Diagram shortcut menu function scrolls to today’s date; the vertical blue dashed line is placed at the very left in the visible period.



Navigation Date

Use the **Navigation Date** control to go to a specific date. This control is highlighted by a blue box in the following example.

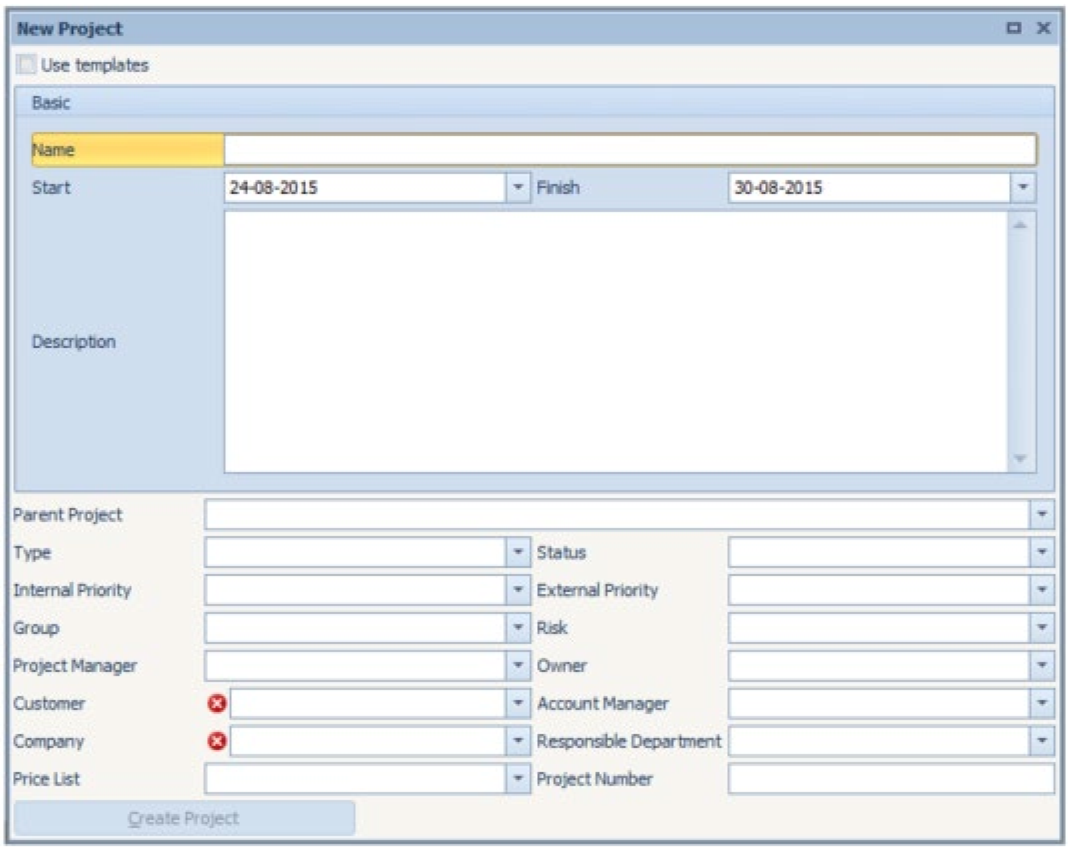


Projects

Create a Project

Use the **New Project** view to create a project. The following figure shows an example of this view.

> **Tip:** You can simplify project creation by using a template that prepopulates a new project with information from the project from which the template was created. See Create a Project from a Project Template.
>
> See Create and Edit Project Templates for more information about project templates.



To create a project:

1. Click **Views » Projects » New Project**.
2. Select the **Use templates** check box if you want to create the project based on a template (optional).

   The New Project view expands, and you can select the template to use. See Create a Project from a Project Template for the remaining steps to perform. See Create and Edit Project Templates for more information about project templates.
3. Enter a name for the project in the **Name** field.
4. Edit the dates in the **Start** and **Finish** fields as appropriate.

> **Note:** By default, the **Customer** and **Company** fields are required to have values. However, you can configure this to make them optional.

5. Choose a customer from the drop-down list for the **Customer** field.
6. Choose a company from the drop-down list for the **Company** field.
7. Click **Create Project**.

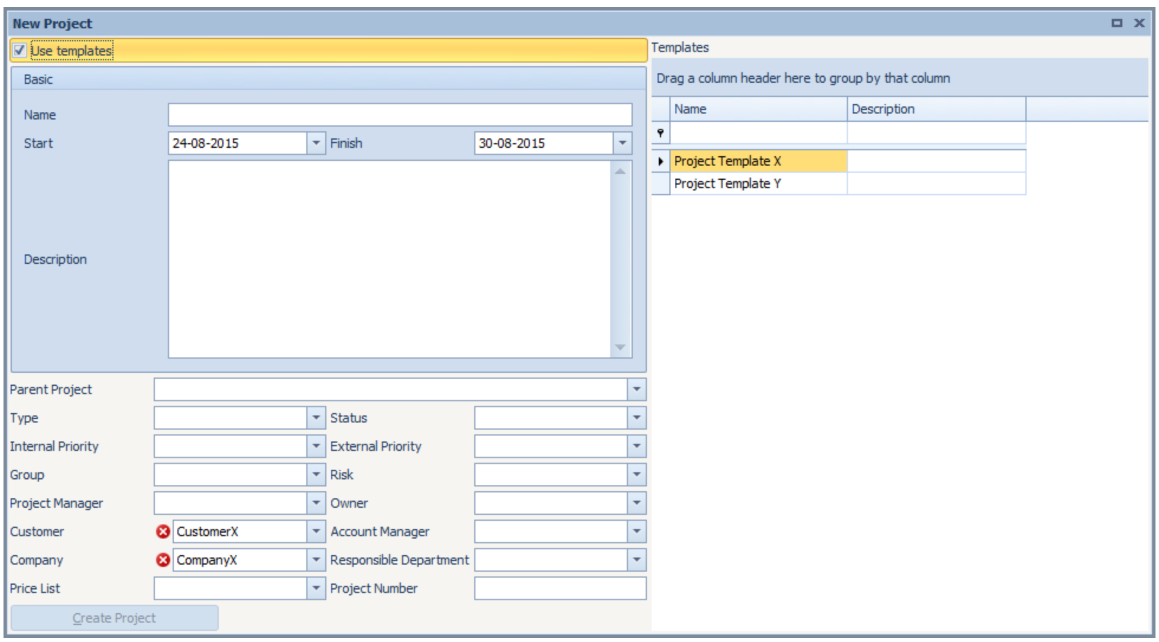
Create a Project from a Project Template

When you use a template to create a project, the new project looks like the original project from which the template was created, with all of the tasks already added, and all of the resources assigned to them, but with no bookings yet.

To create a project from a template:

1. Click **Views » Projects » New Project**.
2. Select the **Use templates** check box.

   The New Project view expands, as shown in the following figure.



3. Enter a name for the project in the **Name** field.
4. Choose the template from which you want to create the project from the **Templates** pane in the right side of the window.

   The template populates values in various fields in the New Project view.
5. Check the values in those fields and ensure that all mandatory fields such as **Customer** and **Company** contain values.
6. Click **Create Project**.

Create and Edit Project Templates

You can use project templates to save time in creating projects. You create a template from an existing project. When you apply that template as you create a project, the new project looks just like the project from which the template was created, with all of the tasks already created, with the resources assigned to the tasks, but with no bookings yet. See Create a Project from a Project Template for more information.

Create a Project Template

To create a project template:

1. Open the Project Managers Gantt chart.
2. Select the project.
3. Click **Ribbon » WBS » Create New Project Template**.
4. Give the template a name and save it.

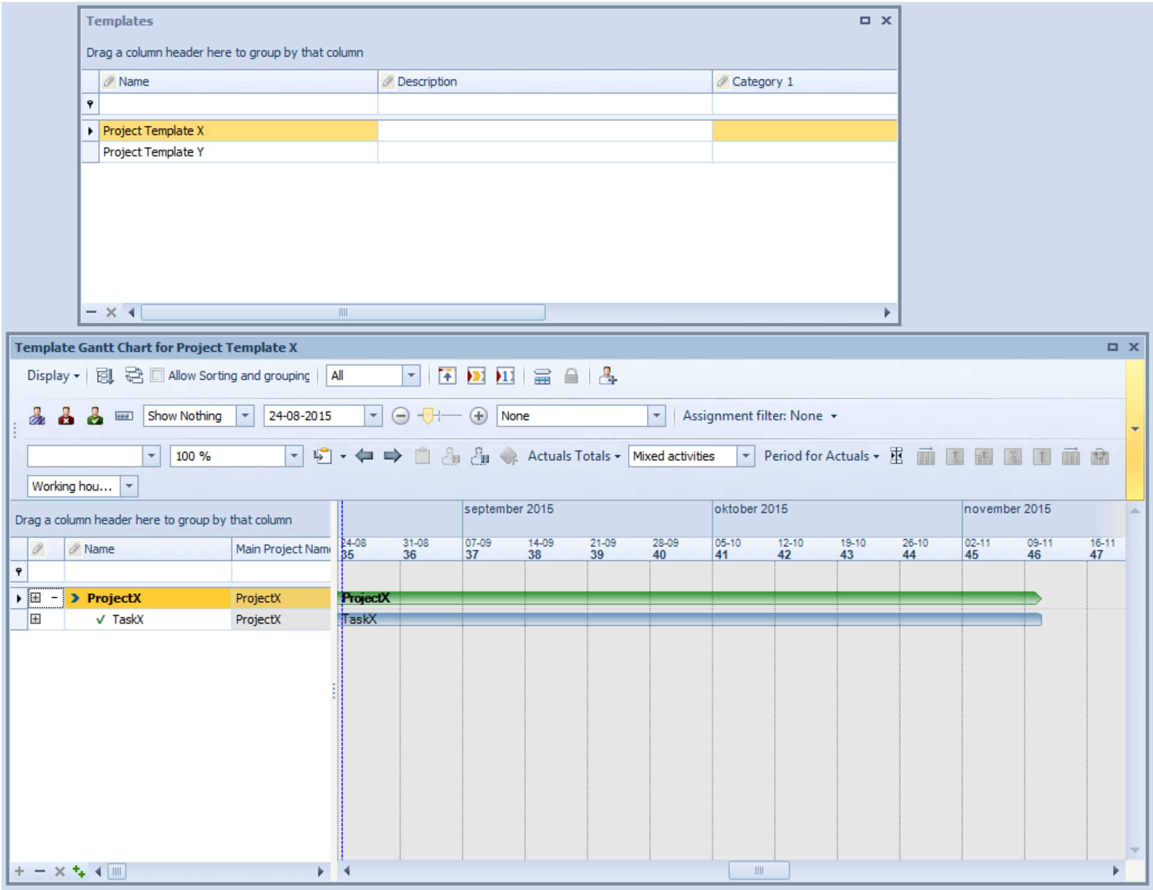
The original project is not changed in any way.

Edit a Project Template

To edit a project template:

1. Open **Views » Templates » Templates**.
2. Select the template to edit.
3. Open **Views » Templates » Template Gantt Chart for Project**.

   The Template Gantt Chart opens, showing a single project (the template); it looks exactly like the Project Manager Gantt (PG) chart. You edit the template project in exactly the same way as you edit a normal project. People Planner saves your edits automatically; there is no undo option.



The Template Gantt Chart for Project view is very similar to the Project Managers Gantt chart.

Create a Subproject

To create a subproject from the New Project view:

1. Choose a project from the drop-down list for the **Parent Project** field.

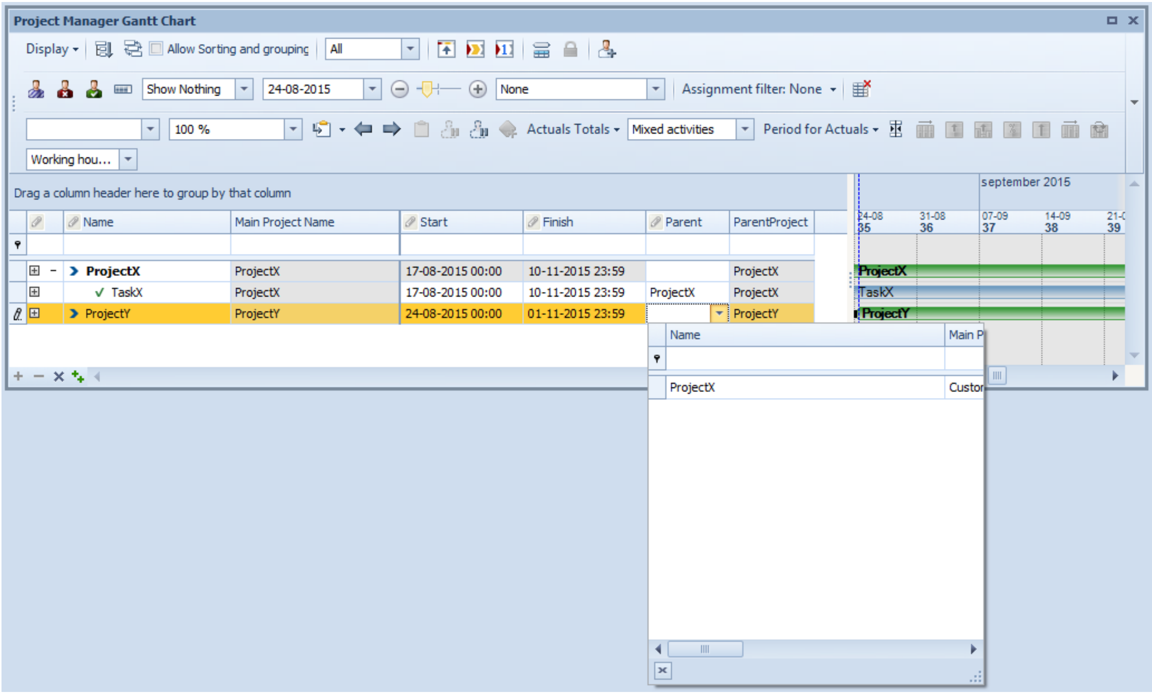
   This parent becomes the parent of the new project.

2. Perform the same steps as for creating a project. See Create a Project.

The following is an alternative method for creating a subproject.

To create a subproject using the PG:

1. Open the PG.
2. Add the Parent columns. See Configure the Grid for information about adding columns.
3. Choose the new parent project from the drop-down list for the **ParentProject** field.



People Planner saves your edits automatically; thus, you do not need to explicitly save your changes. If you want to save the PG with the columns that you added, you can save it as a perspective.

Events

WBS Numbering

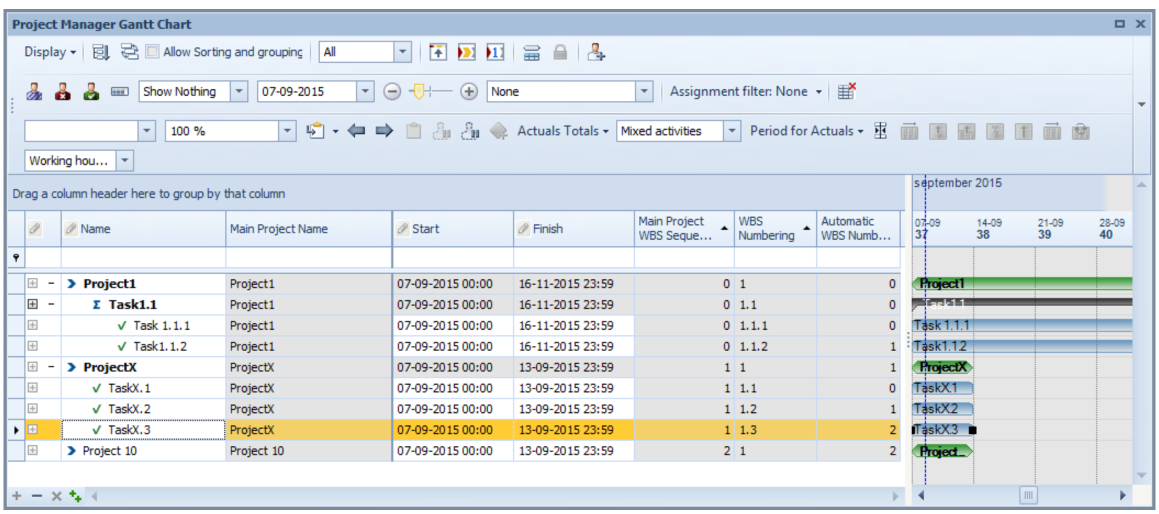
The WBS—Work Breakdown Structure—is the hierarchical tree structure of a project.

You can import a project into People Planner from Maconomy (or another ERP system or file), or you can create it directly in People Planner.

The WBS is made up of three parts.

Part	Description
Main Project WBS Sequence	This number is increased by 1 for each new main project.
WBS Numbering	This number reflects the project's event hierarchy. If the project was imported from Maconomy, this number reflects the WBS numbers in Maconomy.
Automatic WBS Numbering	When there is more than a single event on the same level (siblings), this number is increased by 1 for each sibling event.

Together, the Main Project WBS Sequence and the WBS Numbering values combine into a unique number for each event. The following figure shows an example (this example was not imported from Maconomy).



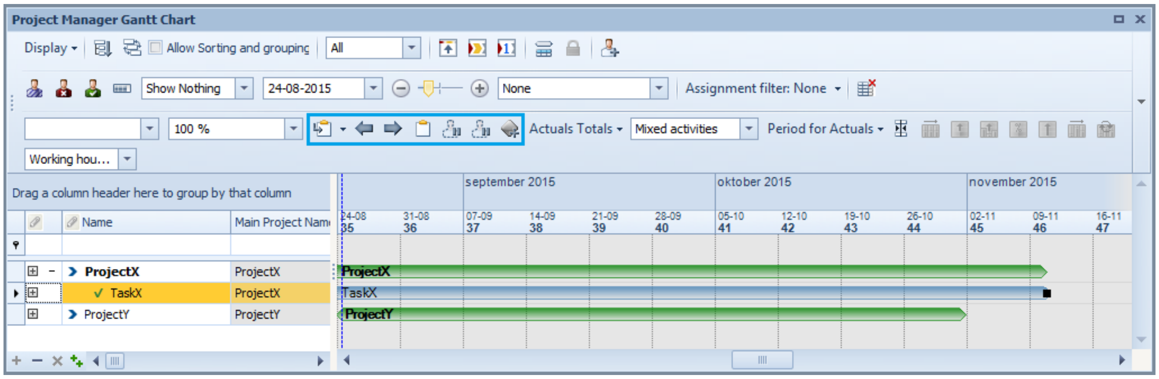
Add Events

"Event" is the shared term for project, subproject, task, summary, milestone, and absence.

- Projects and subprojects are of the same event kind; the only difference is that the subproject has a parent project.
- Tasks and summaries are interchangeable. A task automatically becomes a summary when it has children.

- An absence behaves like the tasks, but it is used for registering vacation, sick time, leave, and so on.
- A milestone has a duration of 0 days and cannot be used for a booking.

Bookings on projects, tasks, summaries, and absences are summarized as “load.”



There are two methods for adding new events to the WBS:

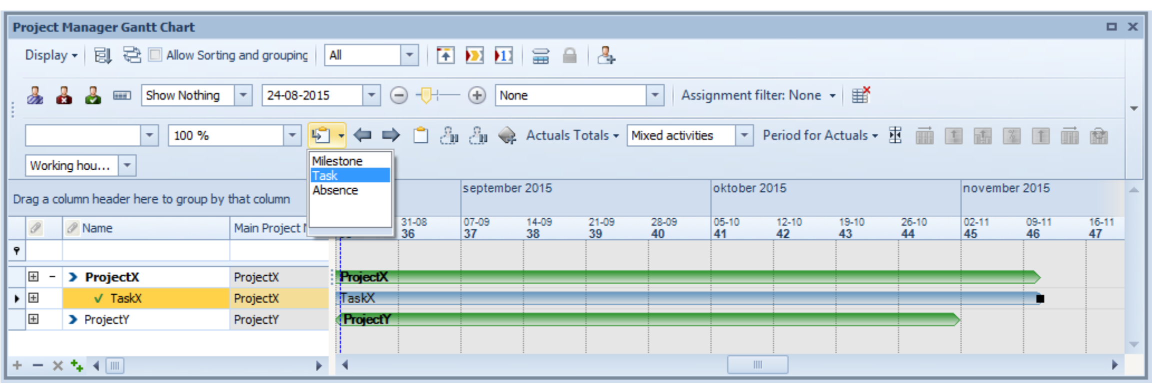
- Add the event as a child to an existing event.
- Add the event as a sibling to an existing event.

Add Event as a Child

To add the event as a child:

1. Open the PG.
2. Select the current event.
3. Click the **Insert Child Task** button.

You can change this button to insert milestones and absences by clicking the small dropdown just to the right of the button and choosing **Milestone** or **Absence**, as shown in the following figure.



Be default, there is also an **Insert Child Absence** button on the PG, as well as buttons for inserting tasks, absences, and milestones. To simplify the GUI, most of these buttons should be removed when the PG is configured and saved as a perspective.

Add Event as a Sibling

To add the event as a sibling:

1. Open the PG.
2. Select the current event.
3. Click the appropriate **Insert Task**, **Insert Absence**, or **Insert Milestone** button.

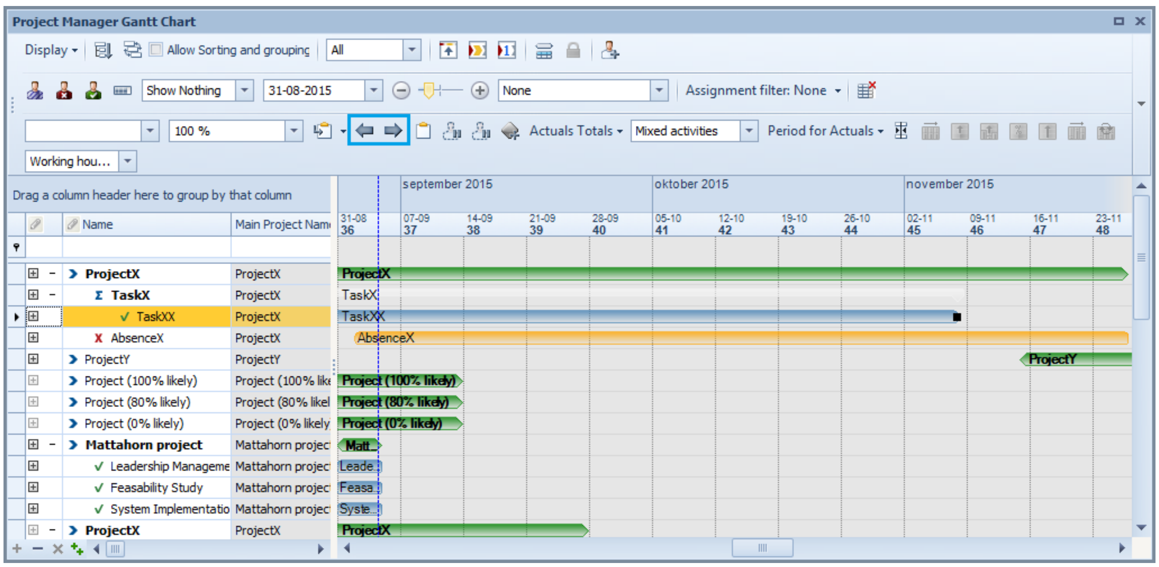
The **Insert Milestone** button is not added to the PG by default.

Move Events

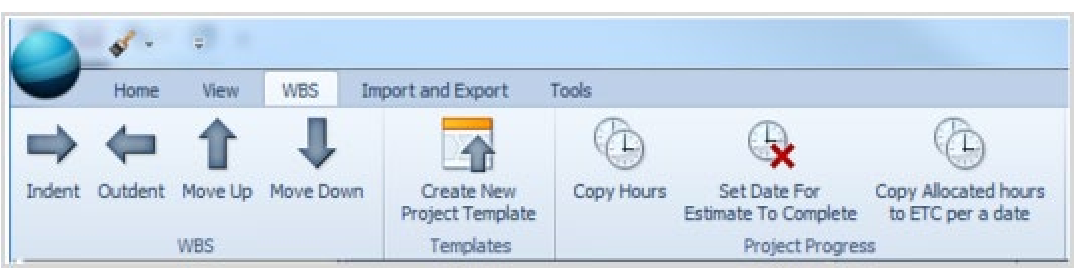
To move events, you indent or outdent them.

- Indenting an event turns it into a child of the event that is just above it in the hierarchy. You can only do this if the two events are on the same hierarchical level initially.
- Outdenting an event turns it into a sibling of its parent event. You can only do this if the outdent does not move the event to the outmost hierarchical level.

The buttons for doing this are included in the PG, as highlighted in the following figure.



You can also move events up and down. You can find the buttons to do this via **Ribbon » WBS**, as shown in the following figure.



- Moving an event up places it before the event that is just above it. You can only do this if the event is not already the first child of its parent.

- Moving an event down places it below the event that is just under it. You can only do this if the event is not already the last child of its parent.

> **Note:** These buttons are only displayed if the specific action is available. For example, if you have selected an event whose origin is “Maconomy,” the **Indent** and **Outdent** buttons are not displayed.

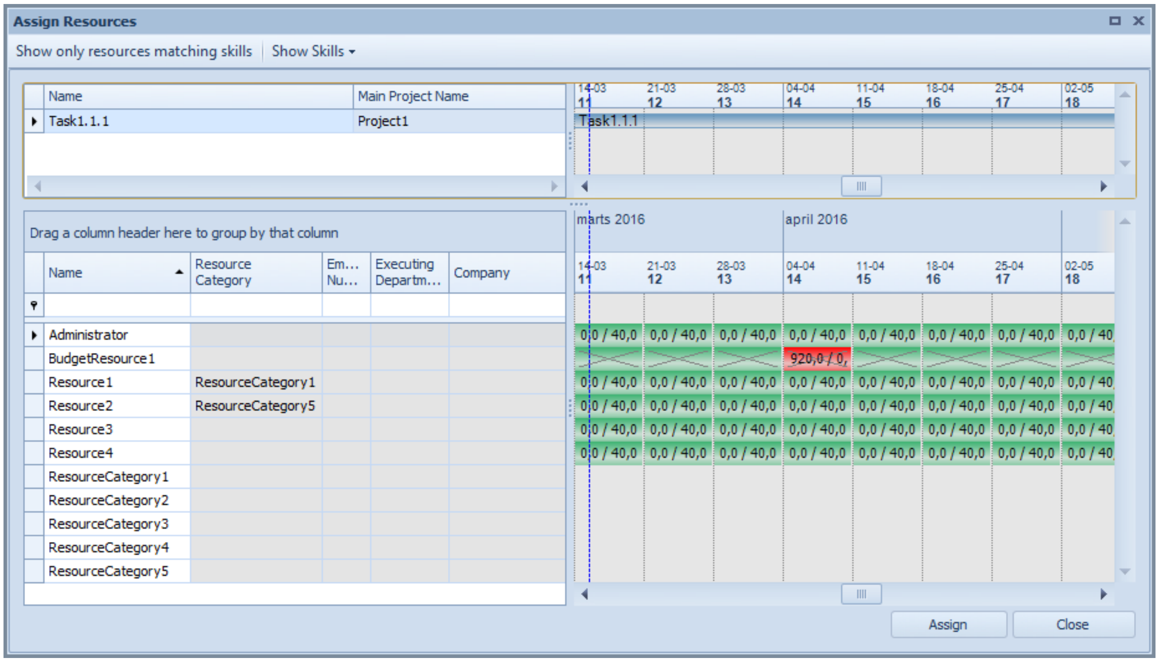
Assign Resources

People Planner provides several methods for assigning resources to events. The most frequently used methods are described in the following subsections.

Assign a Resource to an Existing Event

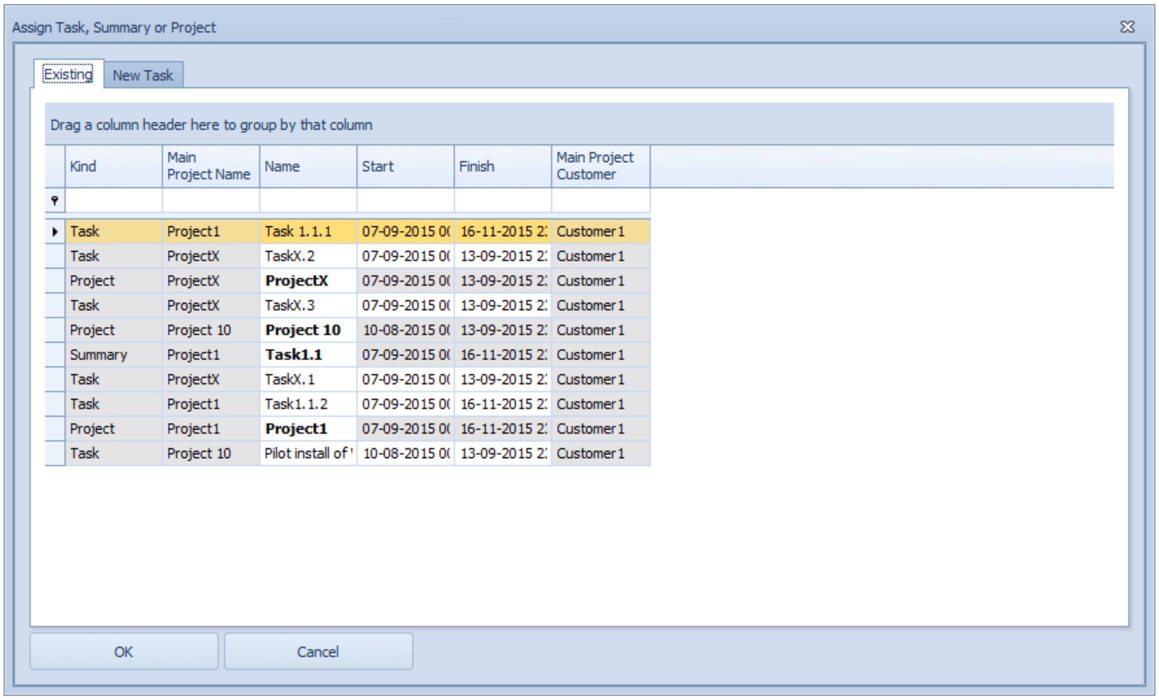
To assign a resource to an event from the PG:

1. Open the PG.
2. Select the event.
3. Click the **Assign Resource** button or use the shortcut menu.
4. Use the **Assign Resources** view to select one or more resources. The following figure shows the example of assigning a resource to Task 1.1.1.



To assign a resource to an event from the RG:

1. Open the RG.
2. Select the resource.
3. Click the **Assign Task/Project** button or use the shortcut menu.
4. Use the Assign Task, Summary or Project view to select the task. The following figure shows an example of assigning the resource to an event.



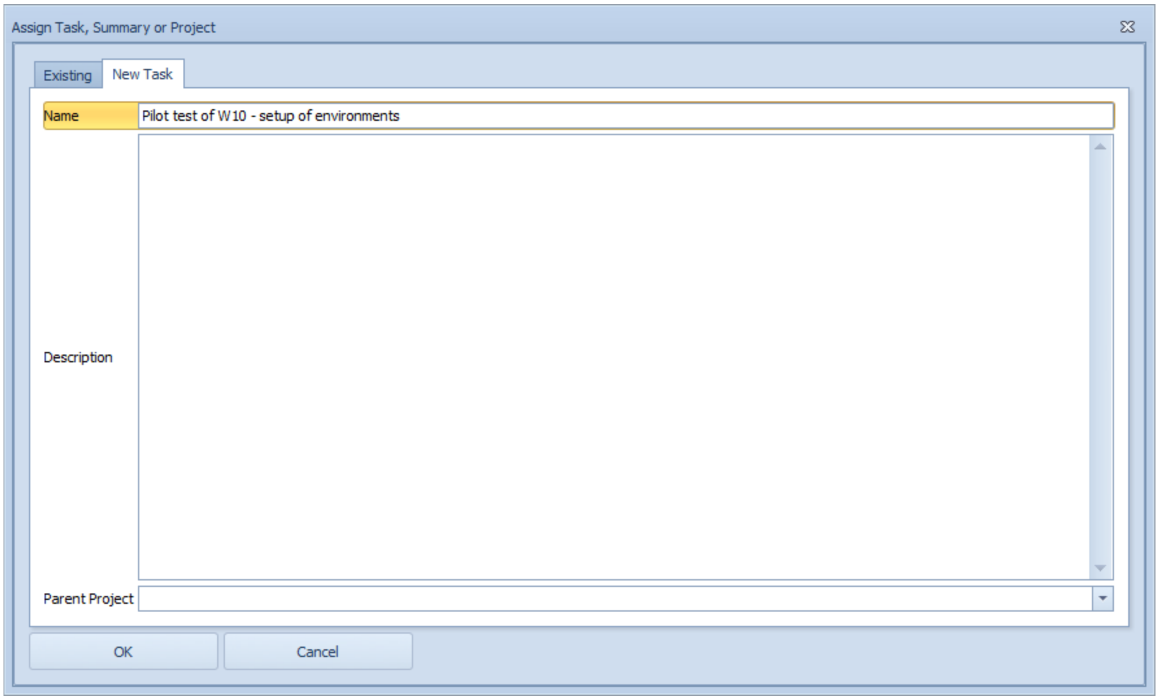
Assign a Resource to a New Event (RG)

In the RG, the **Assign Task/Project** button provides the option to create a task and assign the resource to that task.

To assign a resource to a new event:

1. Open the RG.
2. Select the resource.
3. Click the **Assign Task/Project** button or use the right-click shortcut menu.
4. In the **Assign Task, Summary or Project** view, click the **New Task** tab.
5. Give the task a name, and select the project on which it belongs.

   The following figure shows an example of creating a task and assigning a resource to that task.



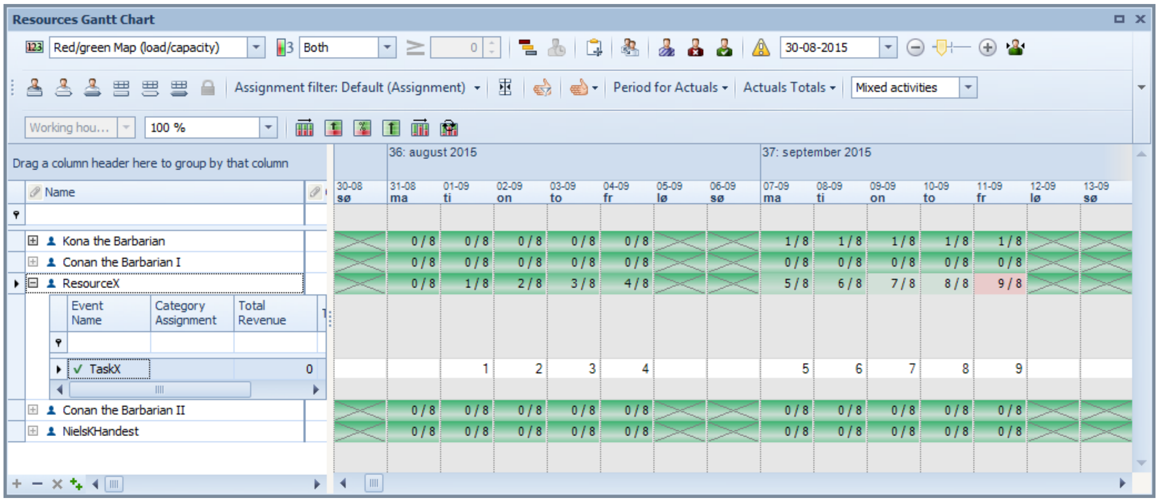
Unassign a Resource from an Event

To unassign (release) a resource from a task in the PG/RG:

1. Open the PG/RG.
2. Select the event/resource.
3. Expand the assignments sub-grid.
4. Select the assignment.
5. Do **one** of the following:
    - Press the **Delete** key on your keyboard.
    - Right-click on the assignment and choose **Release** from the shortcut menu.

Reassign an Event from One Resource to Another

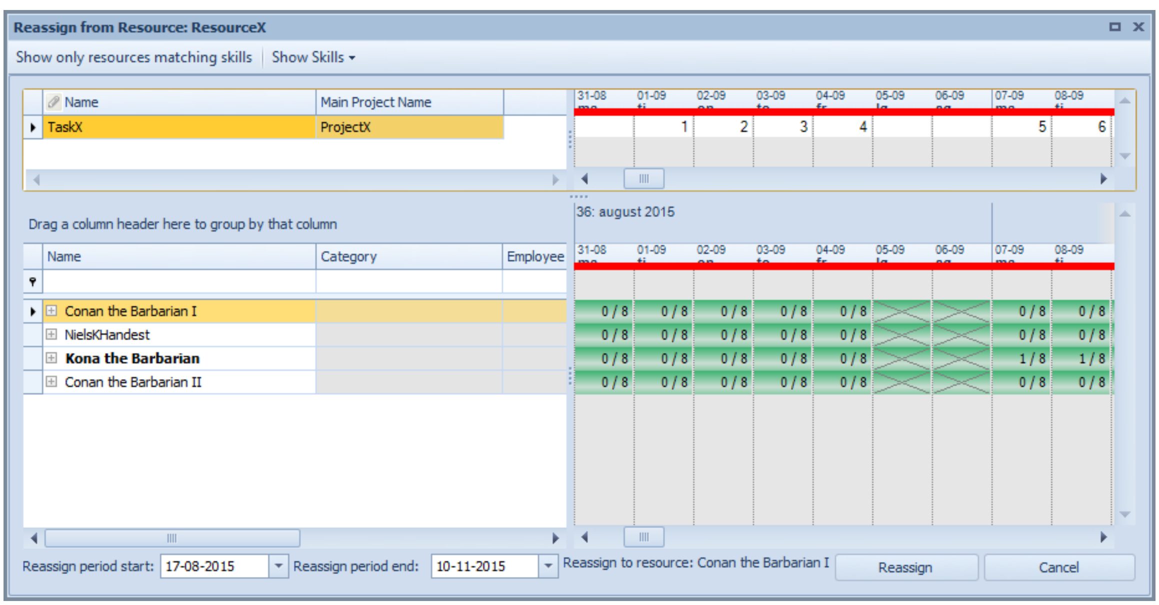
You might need to reassign tasks from one resource to another. For example, a resource might leave the company, so you need to assign his or her tasks to someone else.



To reassign an event from one resource to another in the PG/RG:

1. Open the PG/RG.
2. Select the task/resource.
3. Expand the assignments sub-grid.
4. Select the assignment.
5. Right-click on the assignment and choose **Reassign** from the shortcut menu.

   In the RG, you can do the same thing by clicking the **Reassign Other Resource** button. This opens the **Reassign from Resource** dialog, as shown in the following figure.

6. Select the resource to which the task should be reassigned.

Unless you want all of the bookings to be moved to the new resource, you must indicate which ones should be left on the original resource, and which ones should be moved to the new resource. You do this by performing **either** of the options in the following step.

> **Note:** < By default, all bookings are moved to the new resource unless you specify otherwise by editing the reassign period start and end.

7. Do **one** of the following to select the bookings to be moved versus those that should be left on the original resource:
   - Edit the two fields **Reassign period start** and **Reassign period end**.
   - Drag in the two ends of the red bar that is shown.

   For example, if you set the reassign period to September 1, 2015 – September 4, 2015, only the bookings on these four days are reassigned to the new resource. The other bookings are not touched.

   Alternatively, you can resize the red bar to reflect the reassign period.

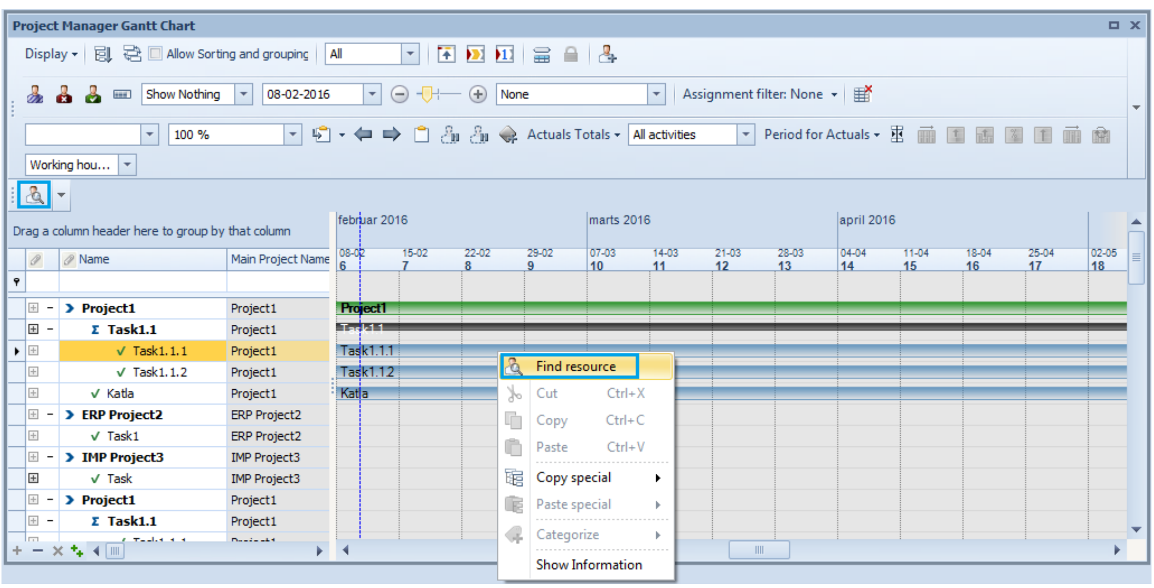
   If a resource name is displayed in bold, that resource is already assigned to the task.
8. Click the **Reassign** button.

Find Resource

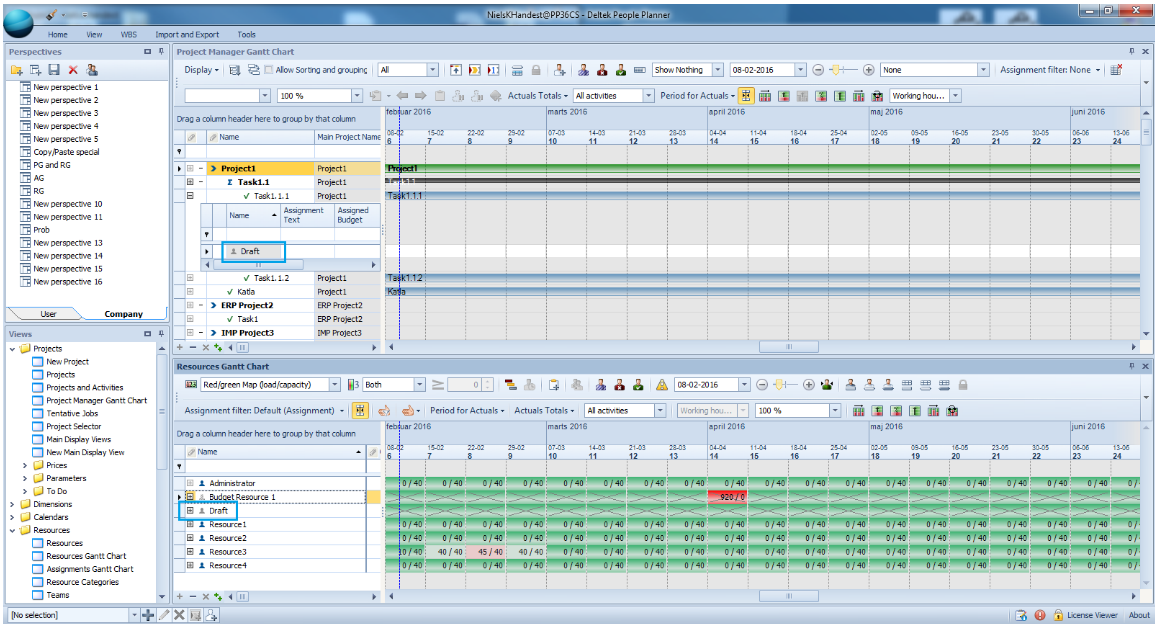
The **Find Resource** functionality is available:

- As a control that you can add to the PG.
- In the shortcut menu that opens when you right-click on a Gantt bar in the PG.

The **Find resource** shortcut menu option is highlighted by a blue box in the following figure.



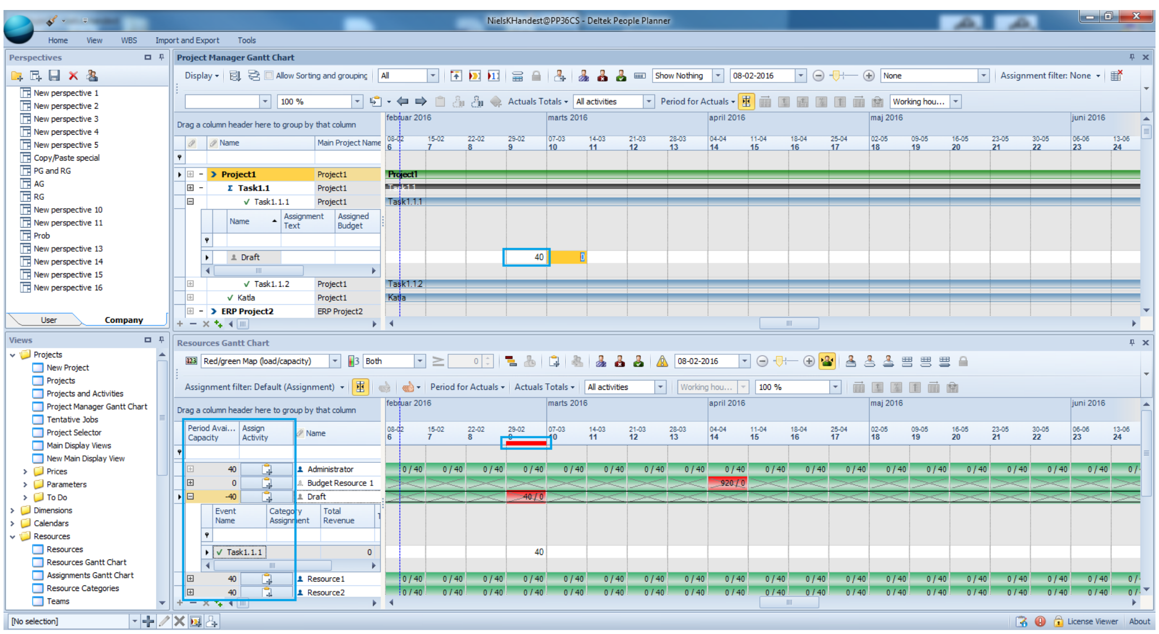
This functionality is disabled until you select a resource. This functionality is therefore often used with a PG combined with an RG. The following example shows the special draft resource.



When you use Find Resource in this way—with a PG combined with an RG—the following happens:

1. A special draft resource is created.
2. The draft resource is assigned to the event.

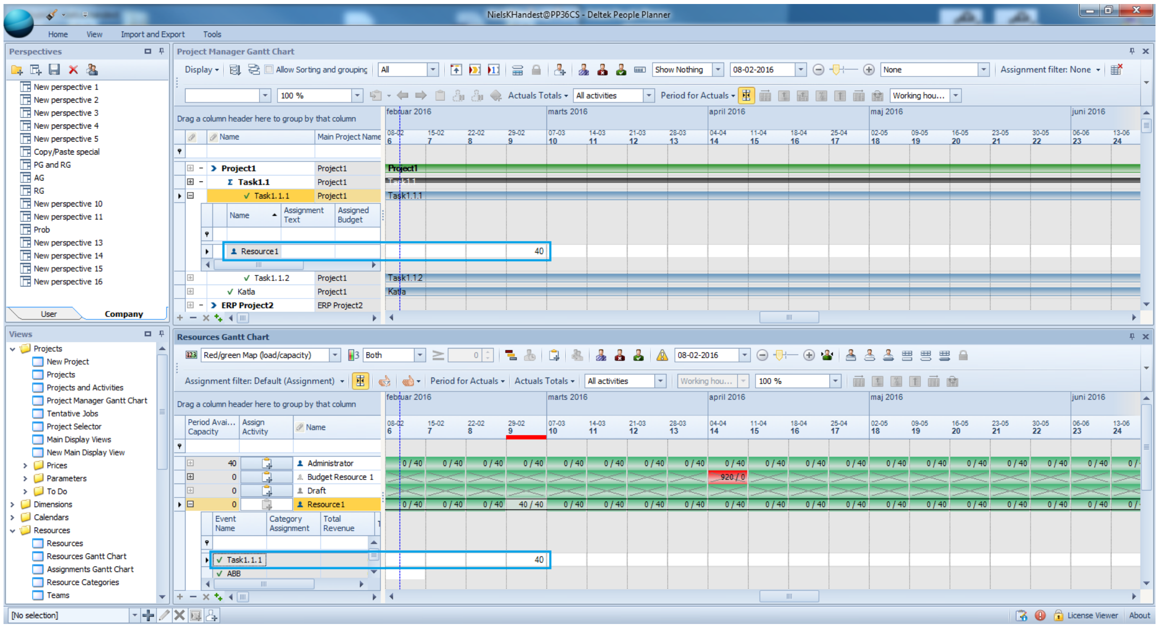
When the draft resource is used for planning—that is, bookings are made on it—two columns, **Period Available Capacity** and **Assign Activity**, are added to the RG.



The Period Available Capacity column shows the available capacity for each resource in the selected period. The period is indicated by a red bar in the timeline in the RG. You can modify the duration of the period by clicking this bar and dragging the ends of it.

The booking of the draft resource indicates how many hours are needed, and the Period Available Capacity indicates how many hours the individual resource has available. When you have found a resource to replace the placeholder draft resource, click the **Assign Activity** button.

In the following figure, Resource1 was chosen.

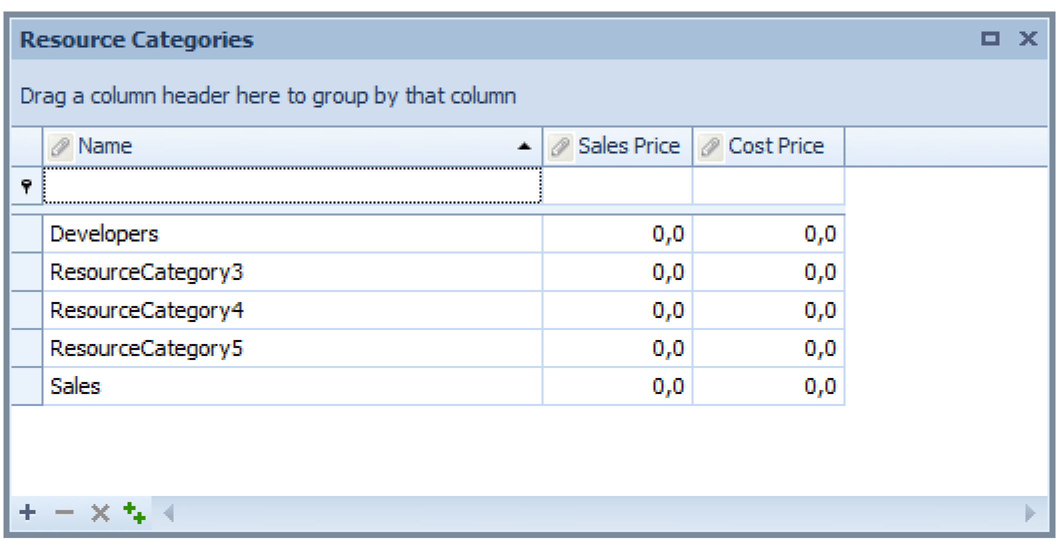


When you click the **Assign Activity** button, Resource1 is reassigned to the task instead of the draft resource. In addition the planned hours are moved to Resource1.

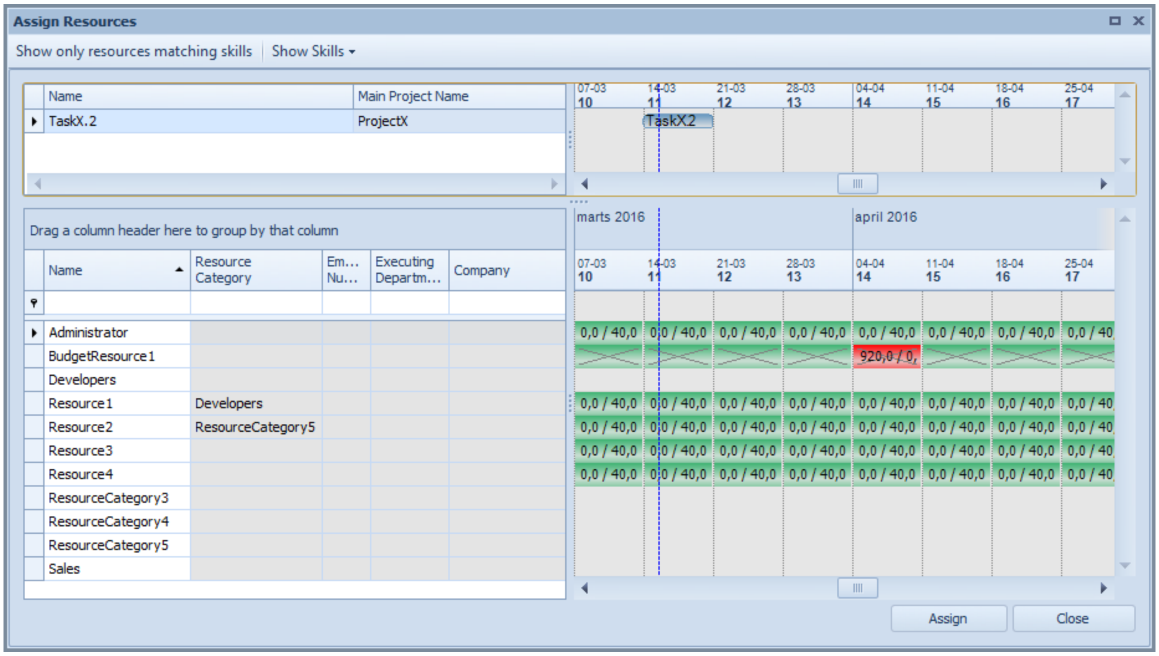
Assign a Resource Category

Beginning with People Planner 3.6 you can assign a resource category to an event.

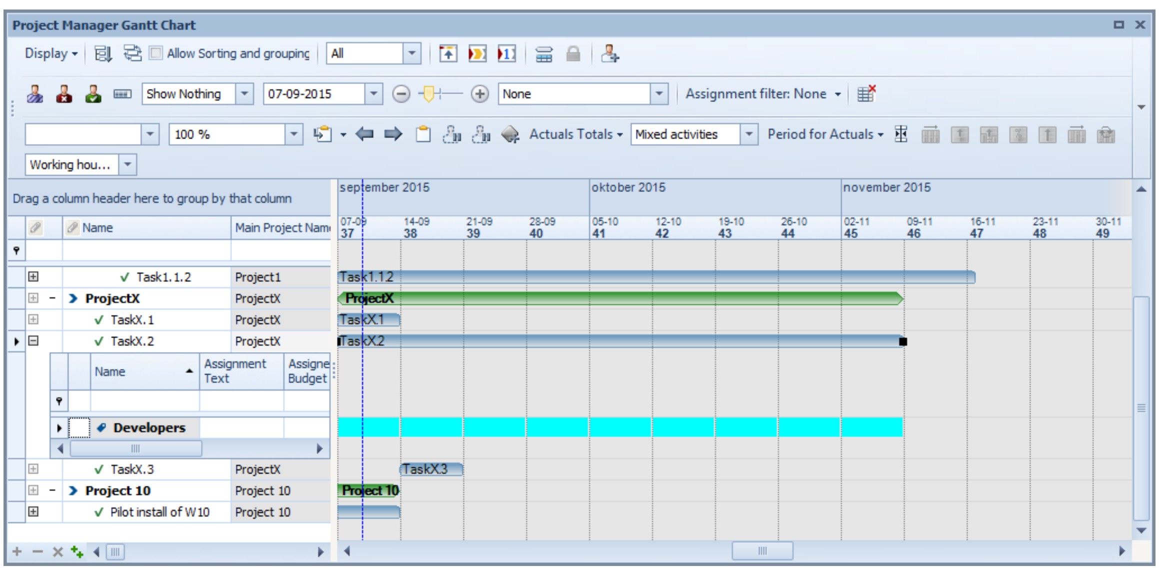
Resource categories are usually imported from an ERP system, such as Maconomy, but you can create them directly in People Planner in the Resource Category view, which you access via **Views » Resources » Resource Categories**. The following figure shows an example of this view.



You assign a resource category to a task in the same way as for a resource (see Assign a Resource to an Existing Event). The resource categories are listed with the resources. The following figure shows an example of assigning a resource category on TaskX.2; the view shows both resources and resource categories.



In the PG, the assignment looks like any other assignment, except that you cannot make bookings; the cells are read-only.



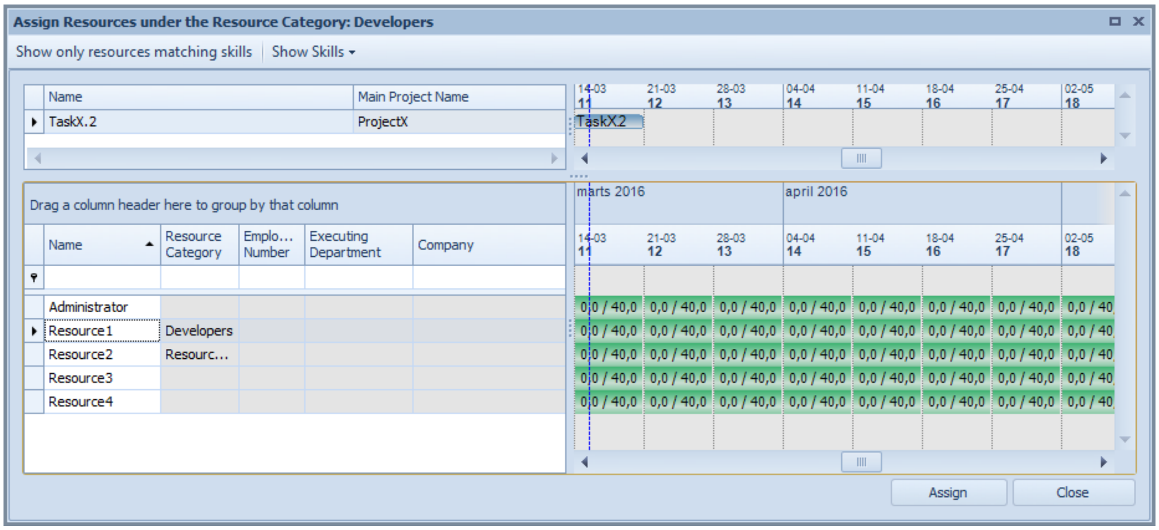
Sub-Assign Resource

You can use a resource category assignment as the basis for assigning one or more resources.

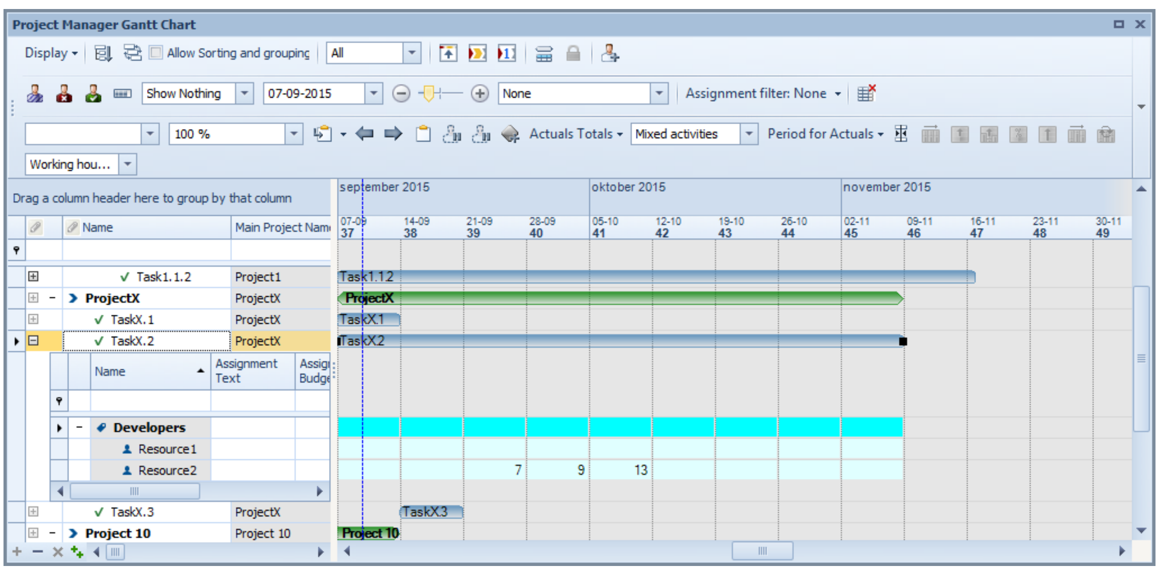
To assign a resource under a category:

1. Select the resource category assignment.
2. Do **one** of the following:
   - Click the **Assign Resource** button.
   - Right-click on the assignment and choose **Assign** from the shortcut menu.
3. Select one or more resources from the **Assign/Release Resources …** view.

   The following figure shows an example of assigning a resource to the Developer assignment category. The view shows resources, but no resource categories, because you cannot assign categories under categories.



The following figure shows two sub-assignments under a resource category assignment.

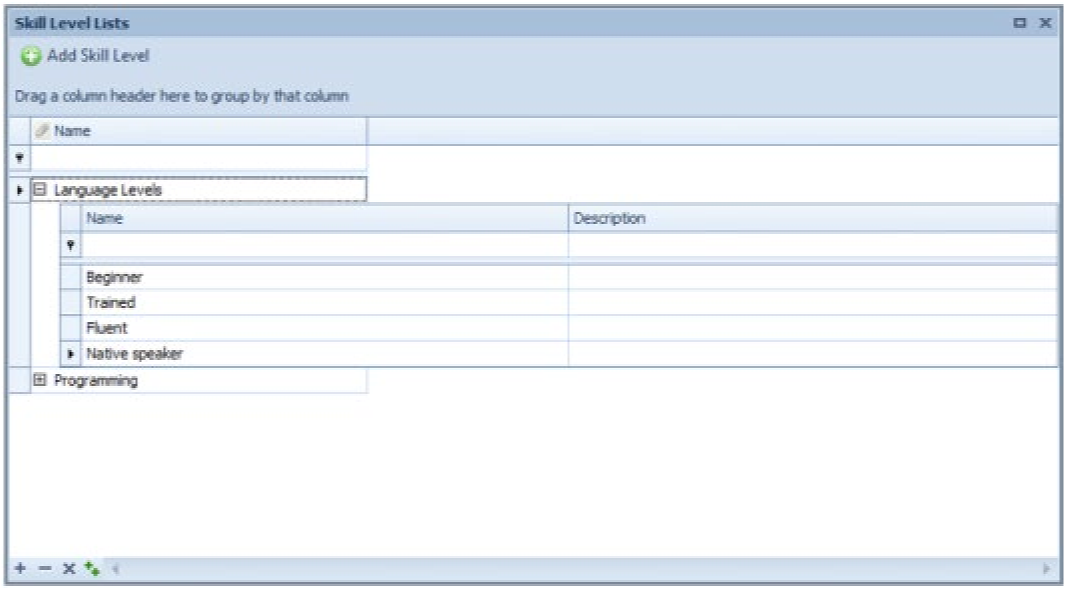


Such assignments have all of the same functionality as normal assignments; for example, you can do bookings on them.

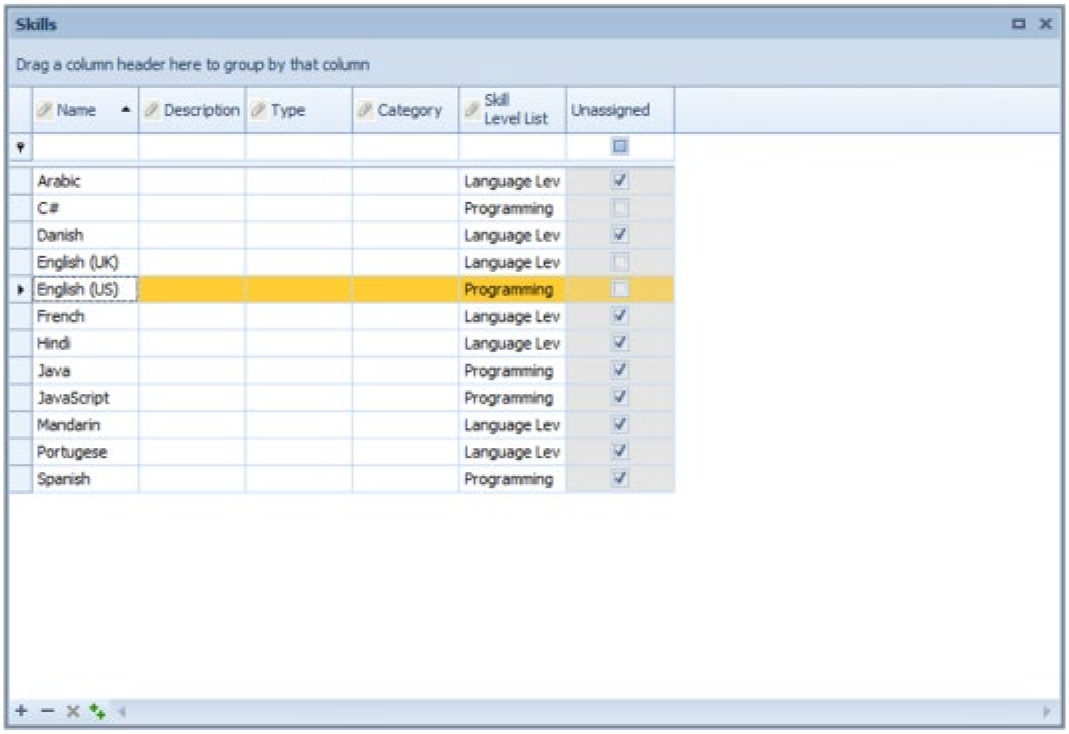
Work with Skills

You can assign skills to resources, and you can use the skills as a filter option when looking for the right resource to assign to an event.

You can group skills in groups of similar types of skills, such as languages. Each such group shares a Skill Level List with steps for how proficient a resource can be. For example, it can indicate whether a resource speaks any language at the possible levels Beginner, Trained, Fluent, and Native Language. The following is an example Skill Level List.

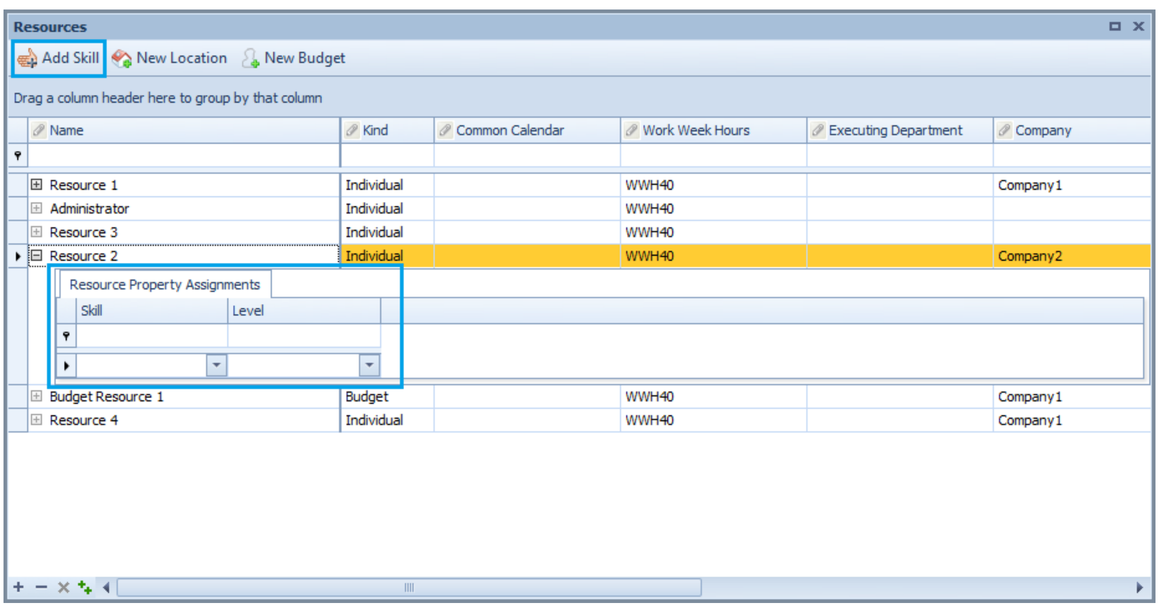


You then define an actual skill, such as English, by its name and which Skill Level List it uses, as the following example shows.



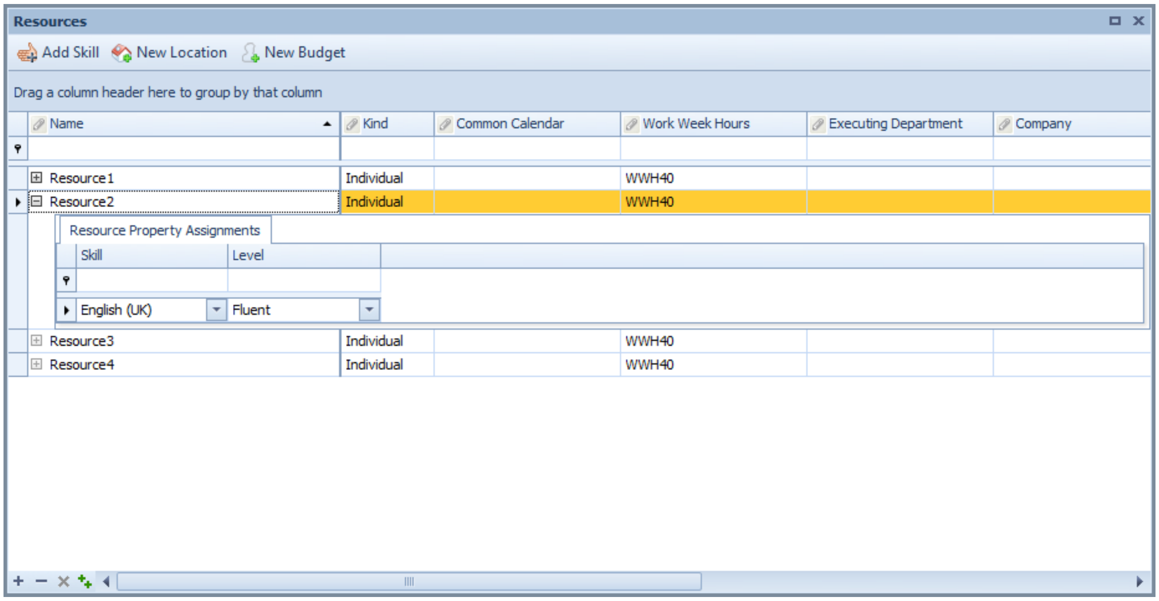
To assign a skill to a resource:

1. Open **Views » Resources » Resources**.
2. Select the resource.
3. Click the **Add Skill** button. The following dialog opens.



4. Choose the skill.
5. Choose the level, which is one of the possible values from the **Skill Level List**.

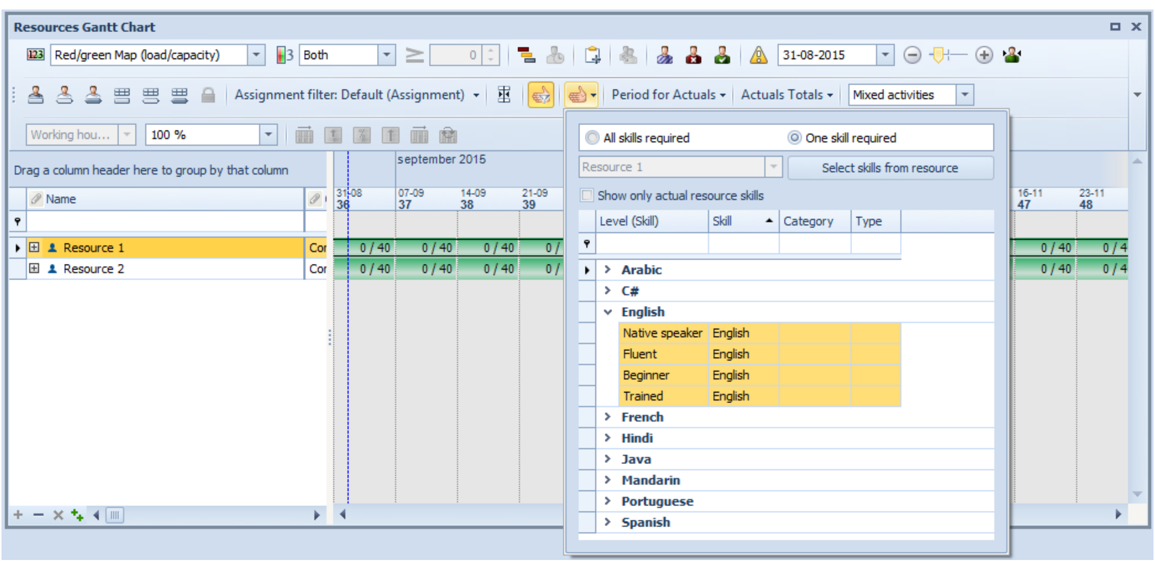
The following figure illustrates the process of adding a skill to a resource, choosing a skill and a level.



In the RG, you can use the **Show Skills** and **Matching Skills** buttons to filter the RG on skills.

The **Show Skills** button displays a dialog where you can select a skill. You can either select the skill generally, or select a level specifically.

When you select a skill the dialog box closes, but the **Matching Skills** button remains selected. When you click this button, the resources that are displayed are filtered according to whether they have the selected skill and level. The following shows an example of filtering the RG on a skill.



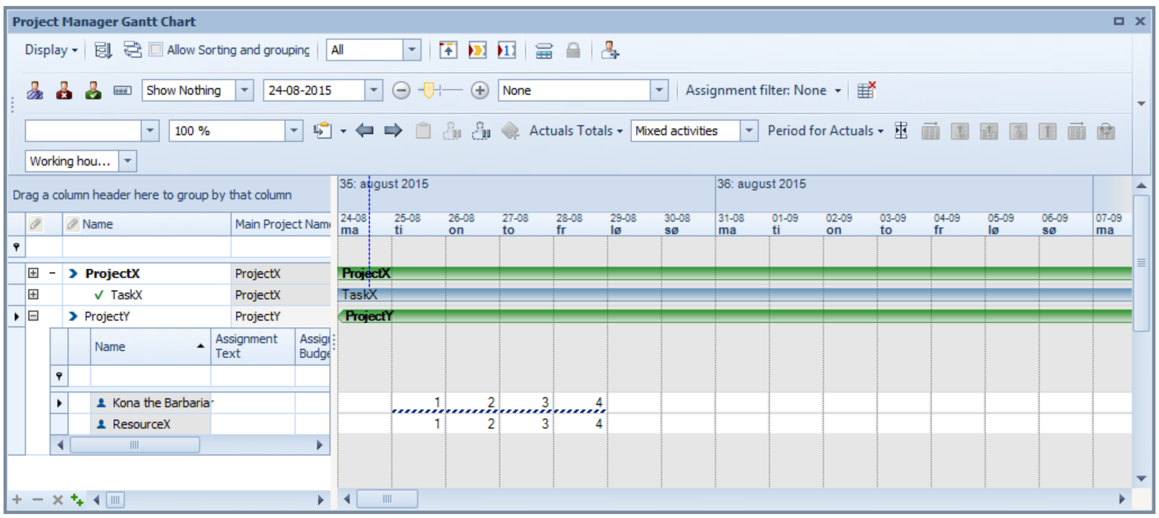
Allocations

> **Note:** Remember that the terms *allocation* and *booking* refer to the same thing: when a resource has been assigned to work on an event for a specified number of hours.

Create an Allocation

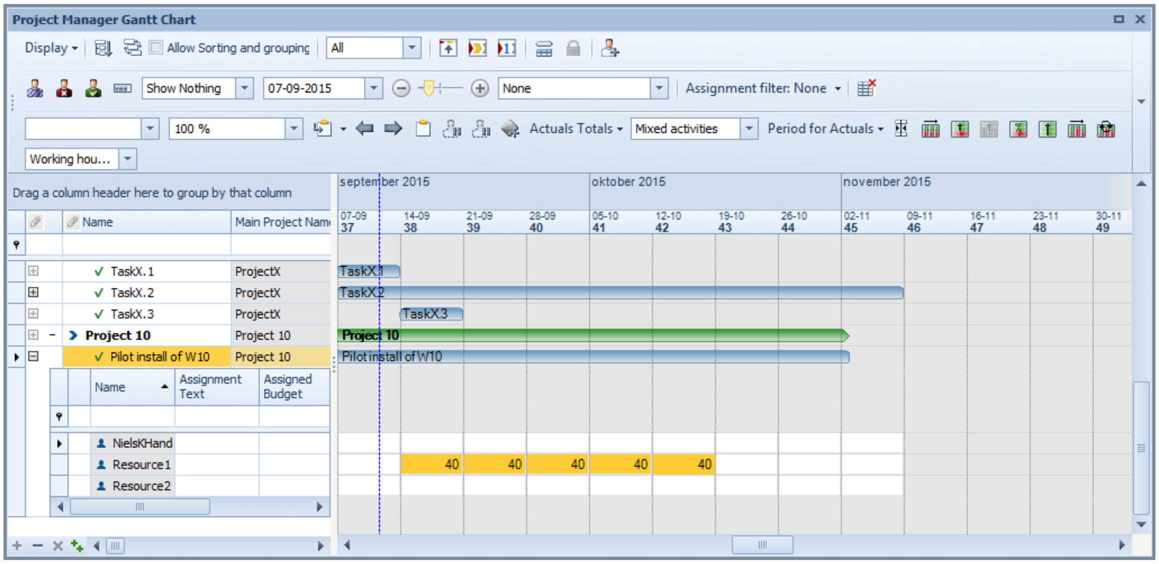
To create an allocation:

1. Access the PG.
2. Locate the resource that you want to allocate.
3. Enter the number of hours that you want to allocate in the appropriate cell and press the **Enter** key on your keyboard.



> **Tip:** If several cells should have the same value, select all of the cells, enter the value, and press **Enter** to submit it.

The following figure shows an example of booking 5 weeks for 40 hours each.



When dashed underlining appears, it means that the resource has been configured for tentative bookings. See Approval Workflow for Bookings.

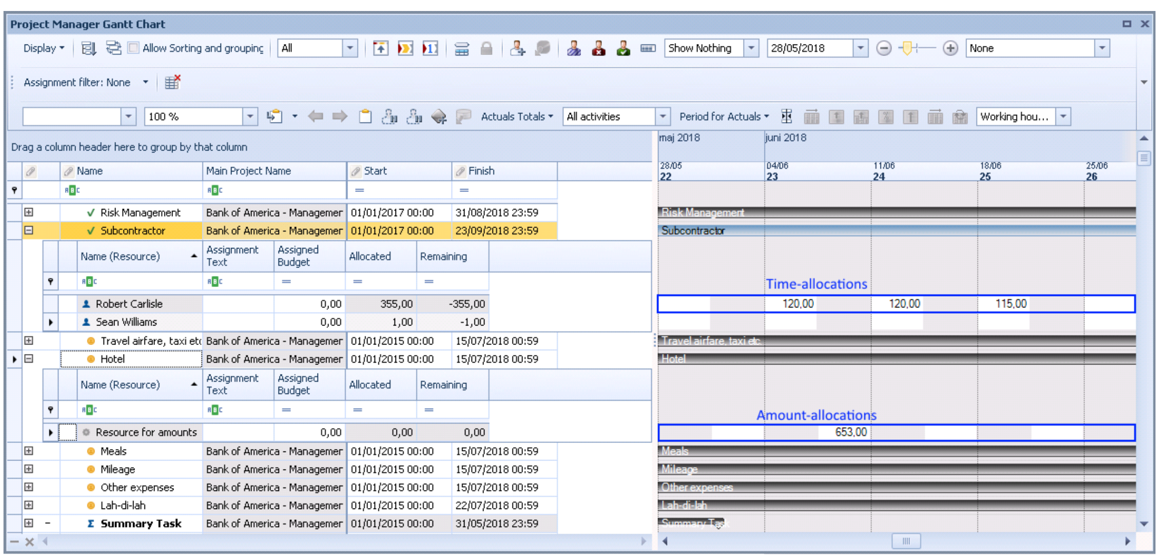
Create an Amount Allocation

People Planner 3.8.4 introduced amount lines, and with them amount allocations. Allocations are considered to be a timespan, normally in hours. In contrast to time lines, which consist of a quantity of hours, amount allocations are an amount, usually a monetary amount.

Amount allocations are performed in exactly the same way that normal allocations are performed. However, they are subject to some restrictions:

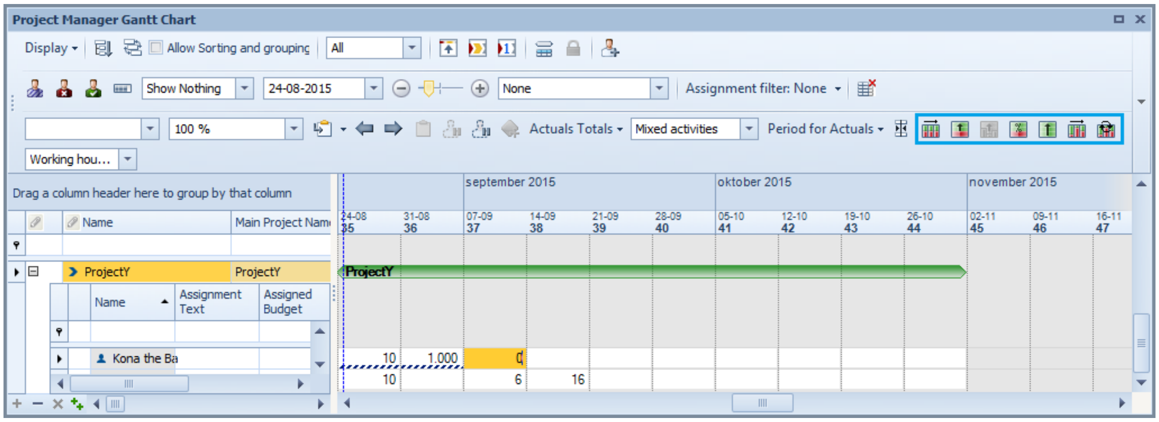
- You must add the Amount Line Account to the PG or RG.
- You can only make amount allocations on the special (generic) Resource for Amounts resource.

In the following example, both of the accounts Working Hours for resources and Amount Line Account have been added to the PG.



Smart Allocation

The following figure shows the buttons that you use for smart allocation, highlighted by the blue box.



Allocate Hours Evenly

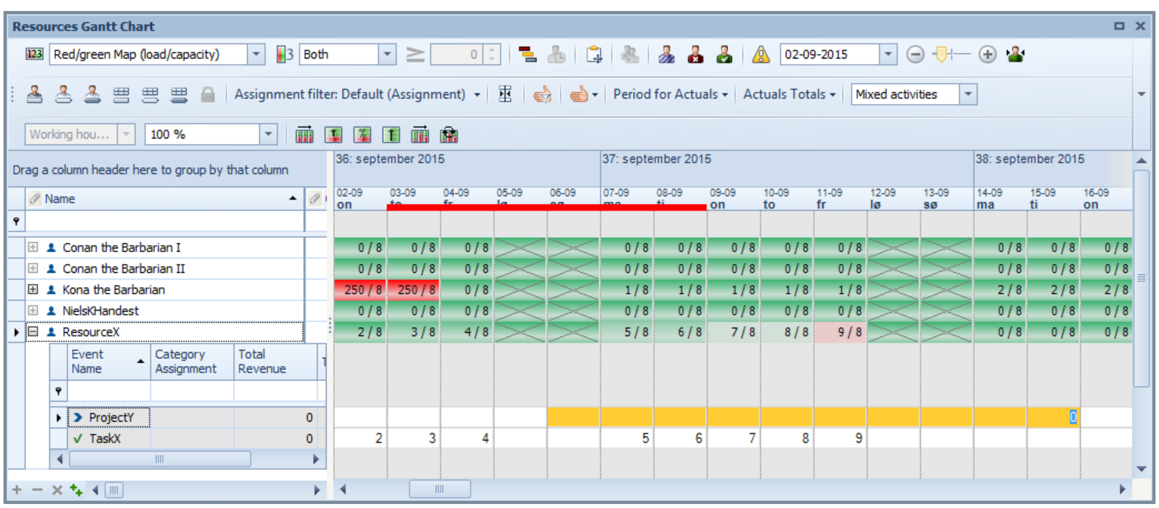
Use the **Even Allocation** button to spread the amount of the allocation equally over the selected cells. For example, if you select 3 cells and enter the value 100 hours, those 100 hours are distributed as 33.3 hours in each cell.

To allocate hours equally over selected cells:

1. Open the PG/RG.
2. Select the cells that should be booked.
3. Click the **Even Allocation** button. The **Even Allocation** dialog opens.
4. Enter the value, and click the **Ok** button.

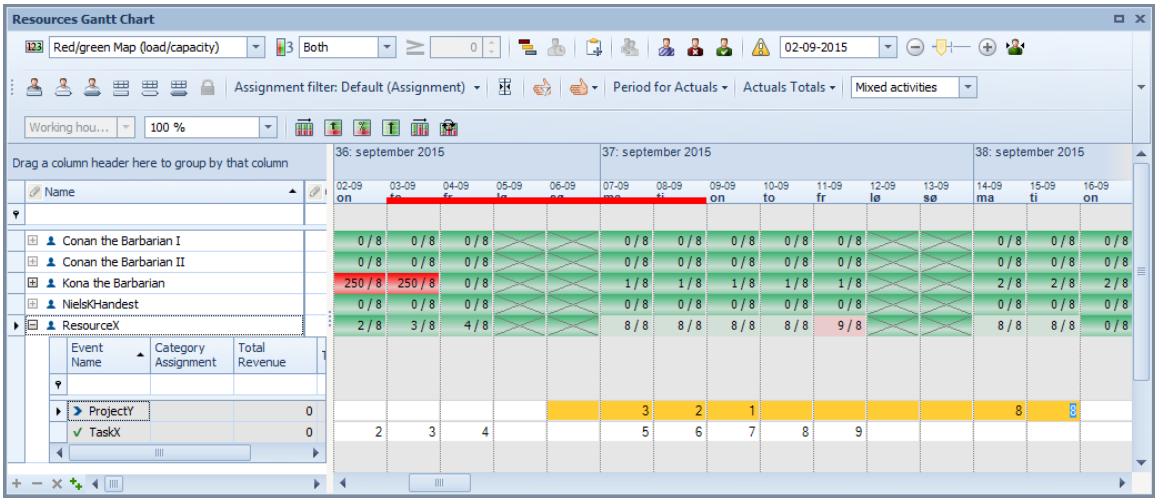
Book Available Capacity

Use the **Book Available Capacity** button to book the remaining available capacity of the resource.



To book a resource's available capacity:

1. Open the PG/RG.
2. Select the cells that should be booked.
3. Click the **Book Available Capacity** button.



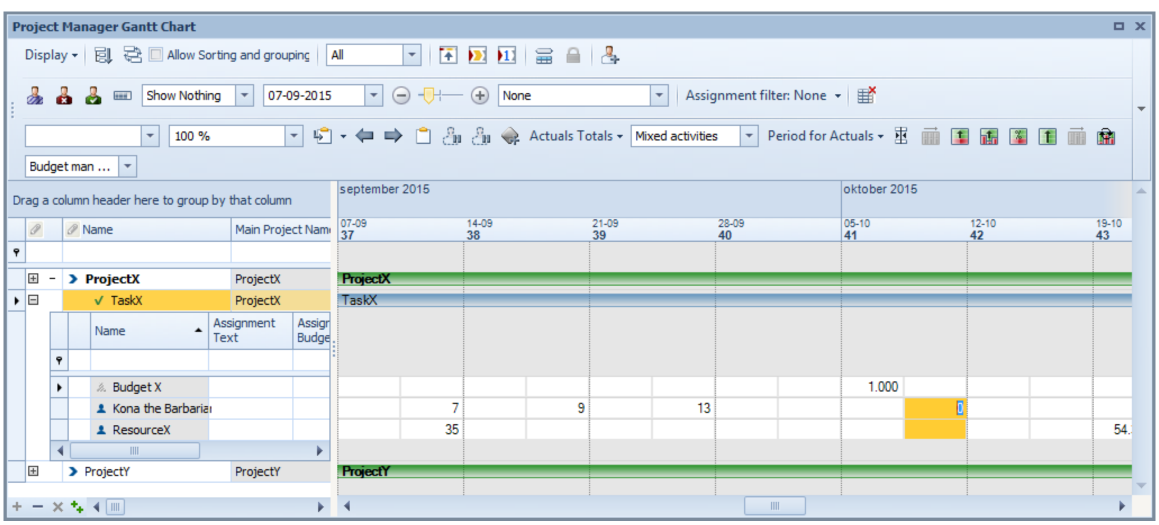
Book Budget Hours on Available Capacity

Use the **Book Budget Hours on Available Capacity** button to distribute the hours from a budget as bookings. This button is only available in the PG.

The following are prerequisites:

- A budget resource, that is, a resource with Kind = Budget, has been assigned to the event.
- The Budget Man Hours account has been added to the PG.
- There are hours allocated on the budget.

The following example shows 1000 hours allocated on the budget (Budget Man Hours account).

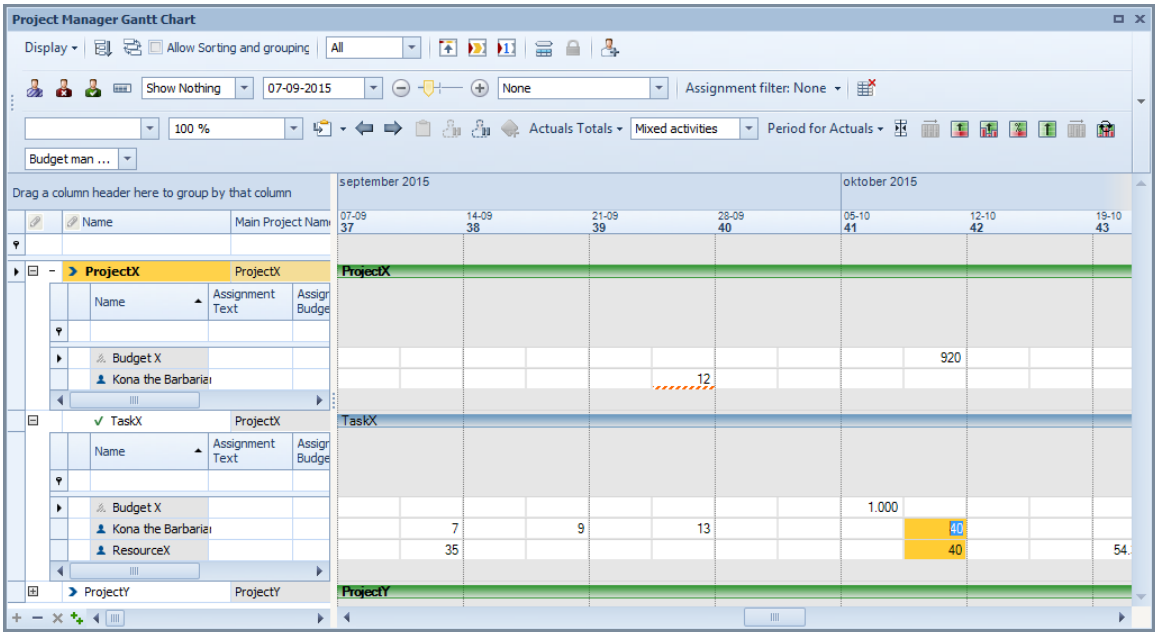


To book budget hours on available capacity:

1. Open the PG.
2. Select the cells where the budget should be allocated.
3. Click the **Book Budget Hours on Available Capacity** button.

   In the following figure, the budget hours are allocated on TaskX, and the remainder is allocated on ProjectX.

   If the entire budget is not allocated to the selected resources, an assignment for the budget is automatically created on the top project, and the remaining budget is assigned there.



Book Full Capacity %

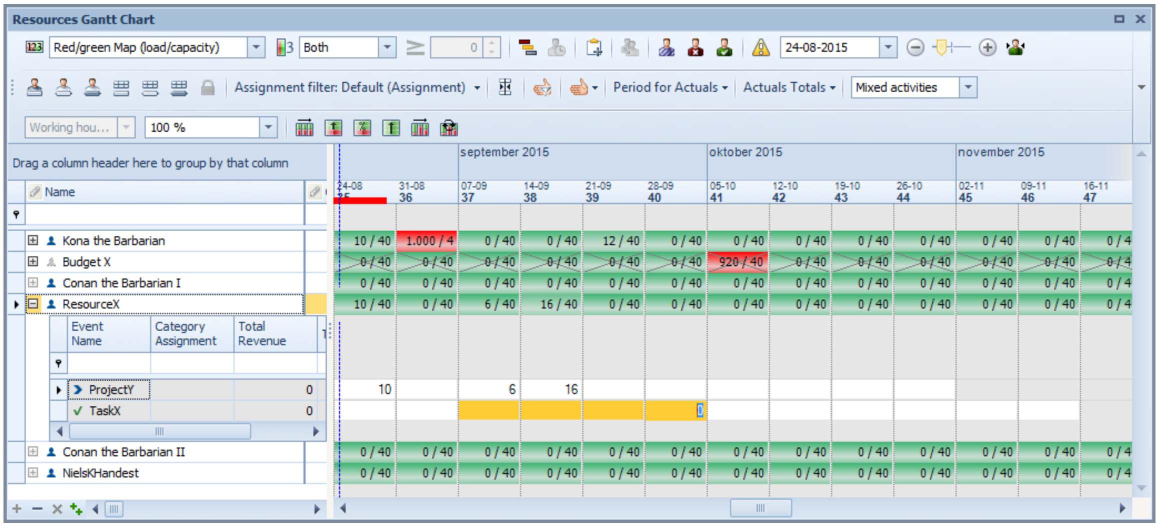
Use the **Book Full Capacity %** button to book a percentage of the full capacity, even if the resource has already been allocated on other events. This can lead to the resource being overbooked.

Book Full Capacity

Use the **Book Full Capacity** button to book the full capacity, even if the resource has already been allocated on other events. This can lead to the resource being overbooked.

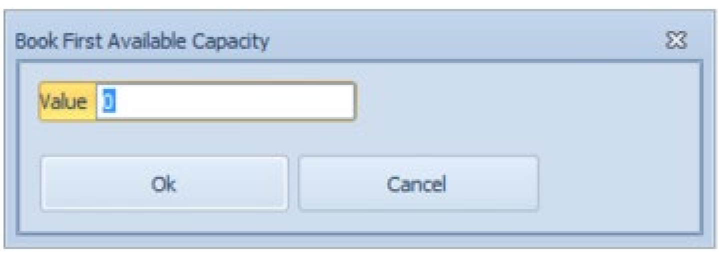
Book First Available Capacity

Use the **Book First Available Capacity** button to book the remaining capacity, beginning with the first selected cell, and continuing with the next cells until the required amount of hours have been met. This can lead to the resource being overbooked. The following figure shows how things look before you use the **Book First Available Capacity** button.



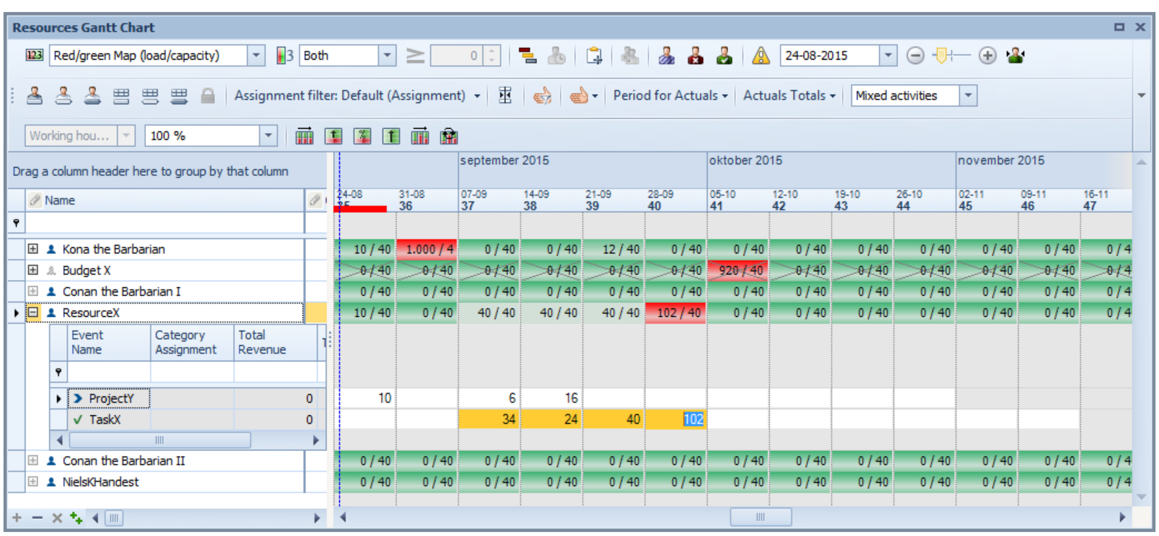
To book the first available capacity:

1. Open the PG/RG.
2. Select the cells that should be allocated for.
3. Click the **Book First Available Capacity** button. The **Book First Available Capacity** dialog opens.



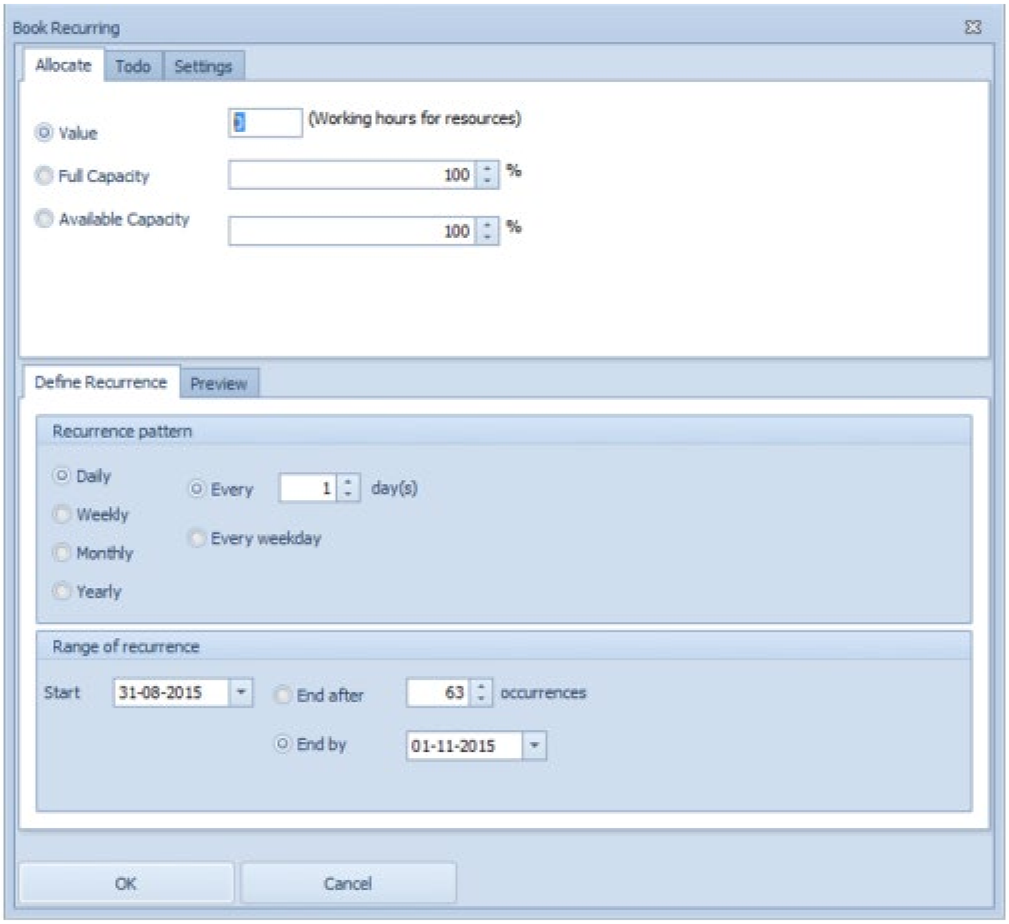
4. Enter the number of hours and click the **Ok** button.

   The following figure shows 200 hours booked, and the remainder allocated in the last cell.



Book Recurring

Use the **Book Recurring** button to create bookings that repeat themselves. When you click the **Book Recurring** button, the following dialog opens.



Approval Workflow for Bookings

Note: Remember that the terms *allocation* and *booking* refer to the same thing: when a resource has been assigned to work on an event for a specified number of hours.

You can configure individual resources to require approval of their bookings. Such bookings are termed "tentative bookings," and are indicated with blue dashed underlining.

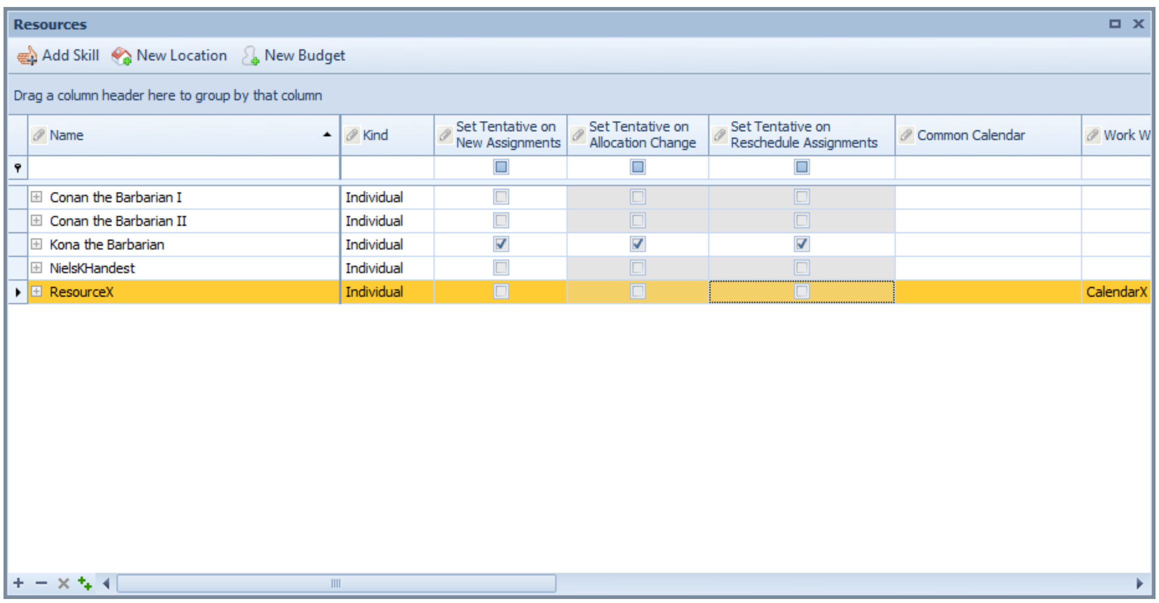
Settings

There are three check boxes for controlling this:

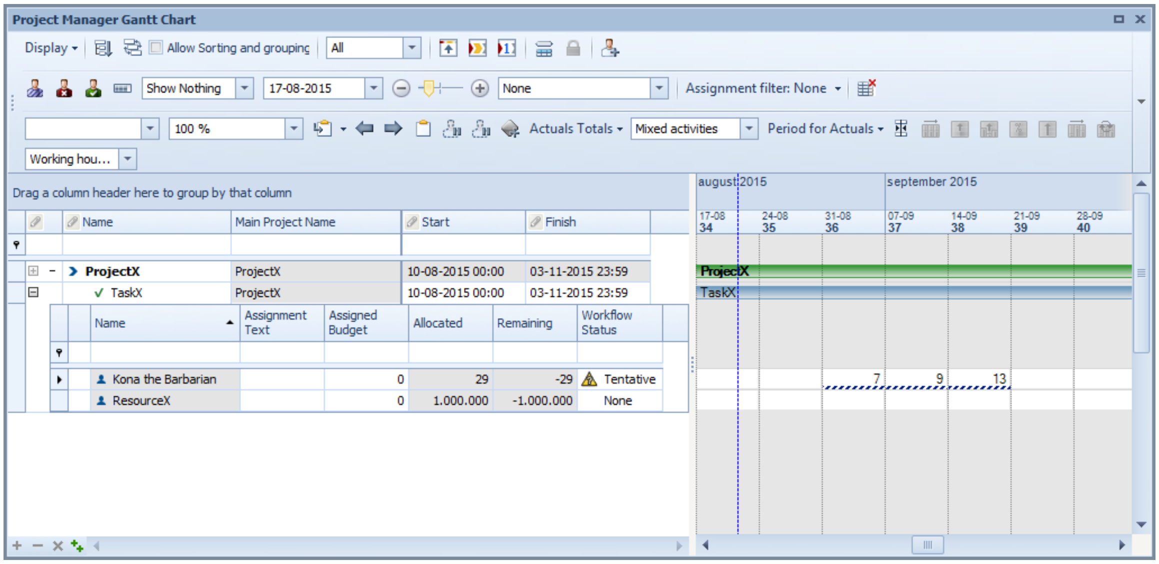
- **Set Tentative on New Assignments**
- **Set Tentative on Allocation Change**
- **Set Tentative on Reschedule Change**

The last two are disabled until the first is checked.

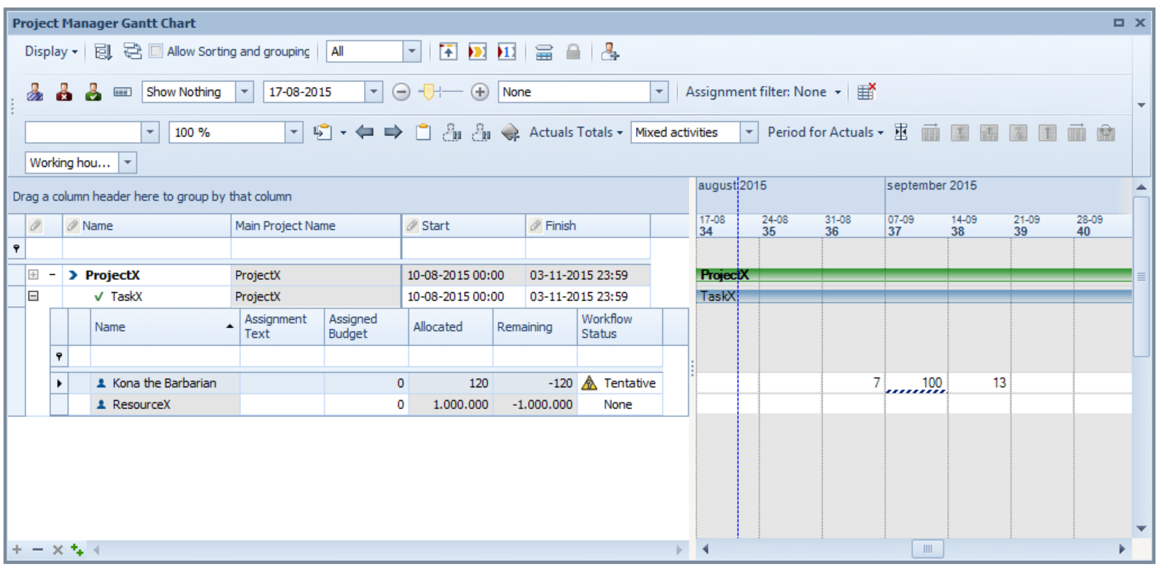
You can access these settings via **Views » Resources » Resources**.



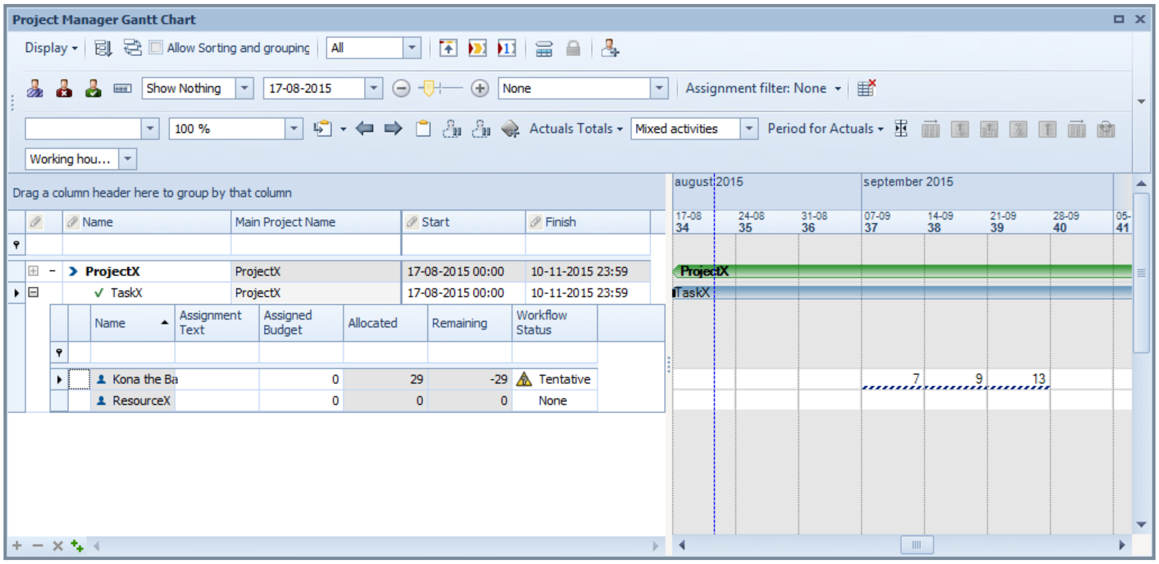
When **Set Tentative on New Assignments** is selected, all new bookings are marked as being tentative.



When **Set Tentative on Allocation Change** is selected, any changes to previously approved bookings are marked as tentative. The following figure shows a tentative booking for 100 hours.



When **Set Tentative on Reschedule Change** is selected, any previously approved bookings that are moved to another date are marked as tentative. As the following figure shows, the previously approved hours have been moved one week toward the future, and they are marked as tentative.



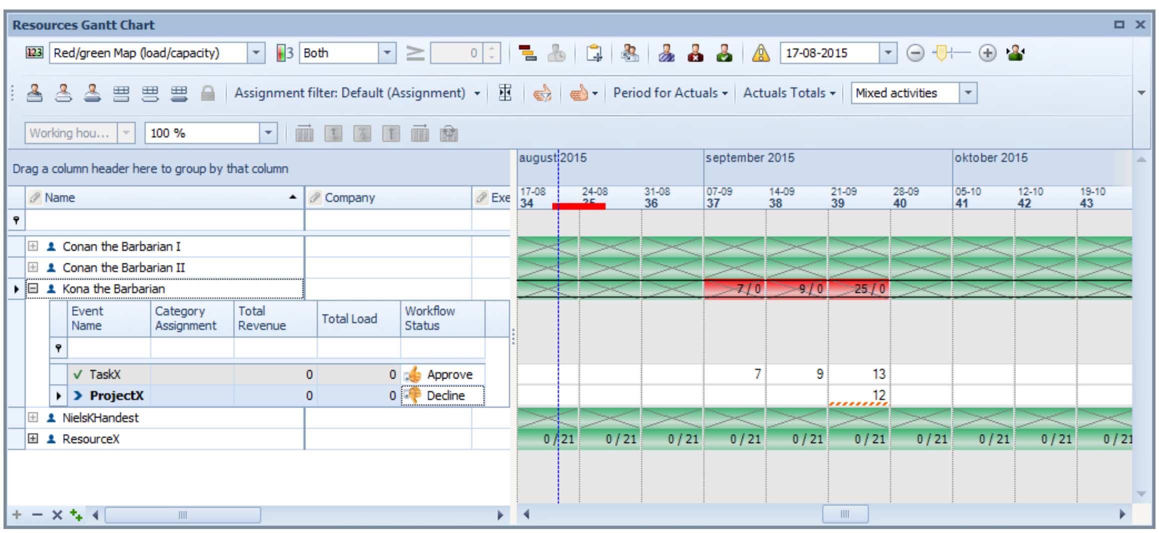
Approve and Decline Bookings

There are three ways to approve or decline bookings.

- Use the **Workflow Status** column.
- Right-click on a booking and use the shortcut menu.
- Select one or more assignments, right-click, and use the shortcut menu.

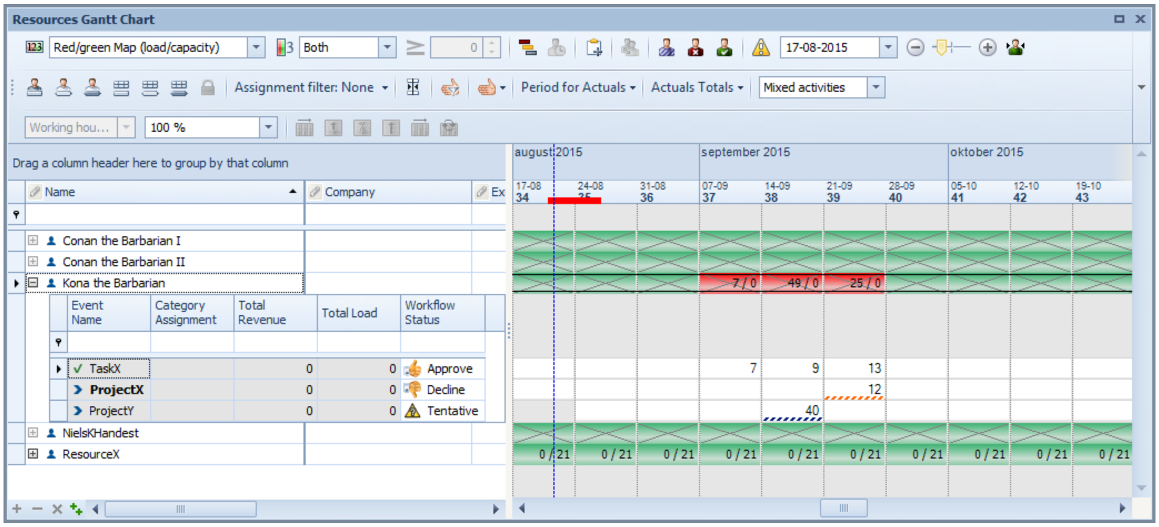
The last two methods are only supported in the RG. The first is available in both the PG and RG.

For approved bookings, the blue dashed underlining is removed. For declined bookings, the blue dashed underlining becomes an orange dashed underlining, as shown in the following figure.



Filter by Workflow Status

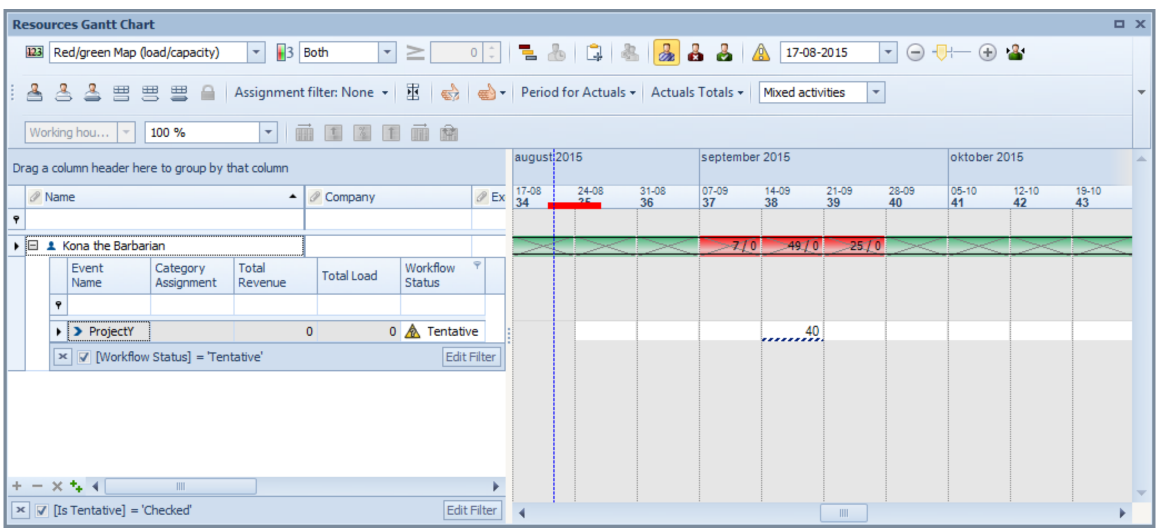
Assignments have the status Approved, Declined, or Tentative, depending on the last action on one of the bookings on the assignment. The value is shown in the **Workflow Status** column.



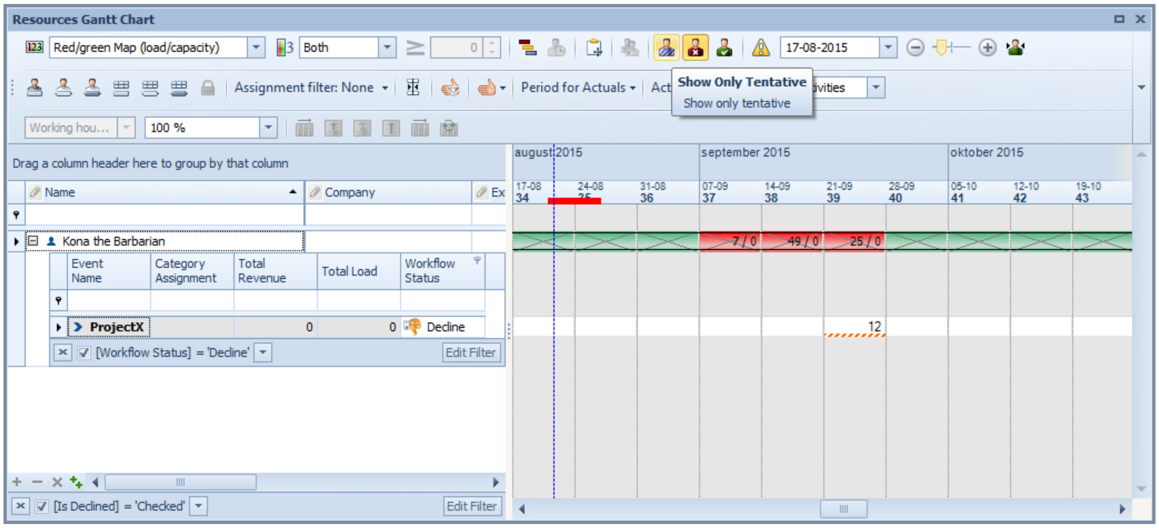
Both the PG and the RG have three filters that determine which assignment lines should be shown. They are mutually exclusive; that is, only one of them can be selected at a time.

- **Show Only Tentative**
- **Show Only Declined**
- **Show Only Approved**

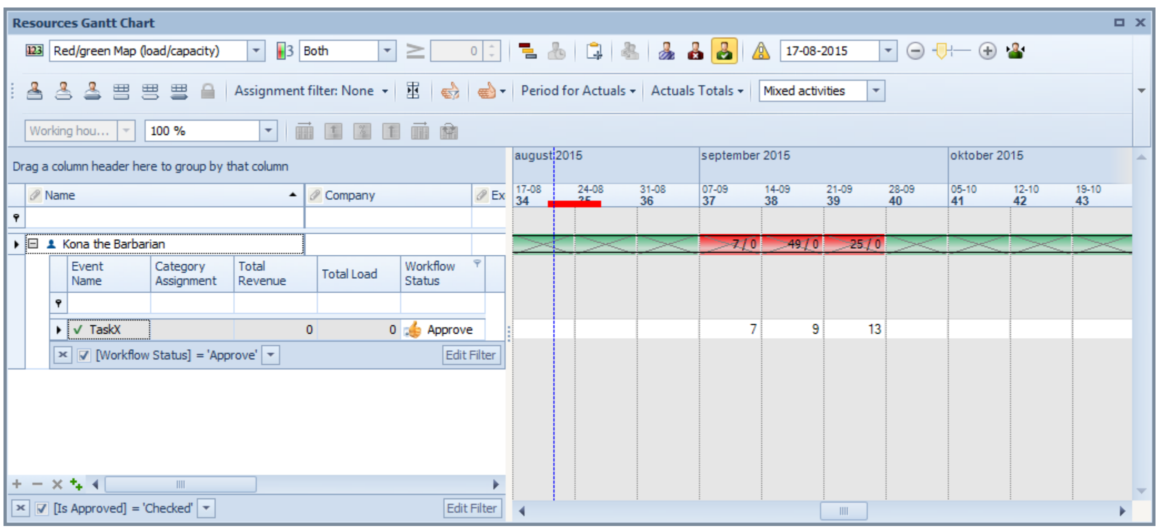
The following is an example of using the **Show Only Tentative** assignments filter.



The following is an example of using the **Show Only Declined** assignments filter.



The following is an example of using the Show Only Approved assignments filter.



See also Sum when Filtering.

Data Limitations

As the name implies, the purpose of a data limitation is to limit on the amount of data that is displayed in a view. There are several uses for this, as the following table illustrates.

Area	Problem	Solution
Security	Not all users are allowed to see all data. For example, legislation often dictates that absence due to illness may not be visible to just anyone.	The administrator can define one or more System Data Limitations that limit the data that is displayed. The data limitations can then be applied either to a role or directly to a user.
Usability	If a view displays all of the data, it can be difficult for a user to locate the data that he or she is currently working with.	A user can create one or more User Data Limitations that restrict the data that is displayed to only the data that he or she finds useful. Alternatively, the administrator can create one or more Public Data Limitations for users to choose from.
Performance	If a view must load a lot of data, this can result in long load times.	By limiting the amount of data that must be loaded, you reduce the network traffic, and the view loads faster.
Memory	There may simply be too much data for the view to display; that is, the application runs out of memory before the view has opened.	By limiting the amount of data that must be loaded, the view takes up less memory.

Although People Planner does not directly use these terms, it is useful to divide data limitations into two types, depending on their scope:

- **Global Data Limitations** — Data limitations that act on all views that the user opens.
- **View Data Limitations** — Data limitations that are tied to specific views; that is, each data limitation is tied to a specific view.

The following table describes the three types of Global Data Limitations.

Data Limitation	Description
User Data Limitation	The users themselves create this type of data limitation. The purpose is usually to block out the data that is not currently relevant to the task at hand. A user can have one or more User Data Limitations from which he or she can choose. The user can also choose not to apply any data limitation, to display all of the data.
System Data Limitation	The administrator defines this type of data limitation. The purpose is to limit the data that users are allowed to see.

Data Limitation	Description
	The users cannot choose between the System Data Limitations, and they cannot choose not to apply them.
Public Data Limitation	This type of data limitation is a mix of the other two types of global data limitations. The administrator creates the Public Data Limitations, but users can choose whether to apply them or not.

The View Data Limitations are applied to the grid part of a view. This can be either the main grid, or in the case of the PG and RG, the assignment sub-grids.

The process of creating a System Data Limitation, a Public Data Limitation, or a User Data Limitation shares many similarities. The following describes how to create User Data Limitations, and the text then moves on to cover the areas where the System and Public Data Limitations differ. After the Global Data Limitations have been covered, the text continues with the View Data Limitations.

User Data Limitations

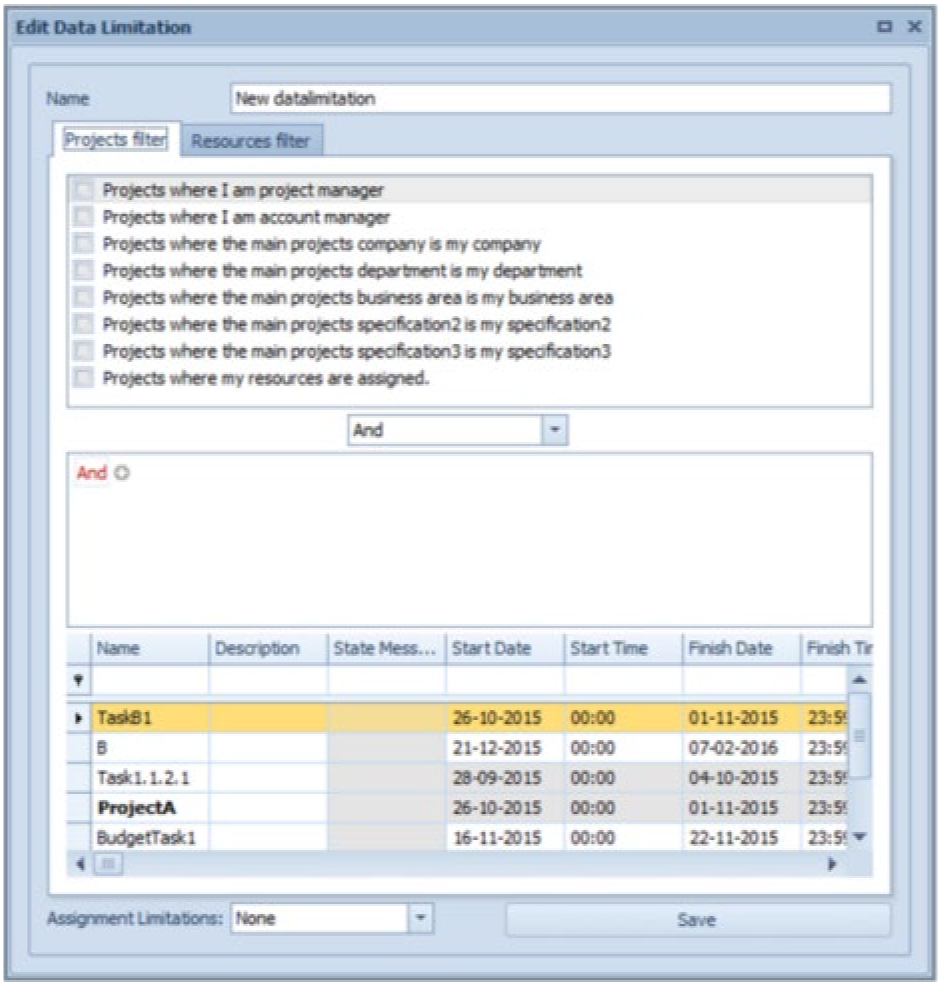
You create a User Data Limitation by clicking the **+** button in the lower-left corner of the People Planner main window.

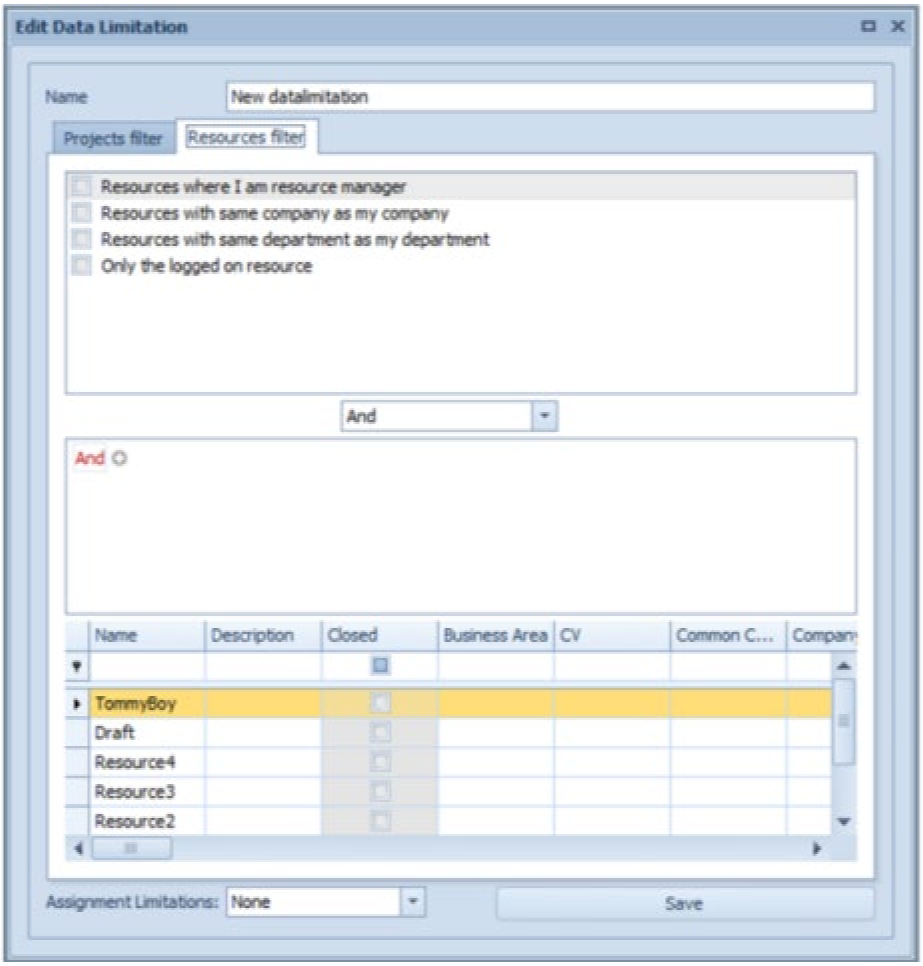
This opens the Edit Data Limitation view. A data limitation has three parts, and you can access them all from this view:

- Projects filter
- Resources filter
- Assignment Limitations filter

The Projects and Resources filters have their own tabs, while the Assignment Limitations dropdown is shared between them. A data limitation can consist of settings in one, two, or all of the three parts.

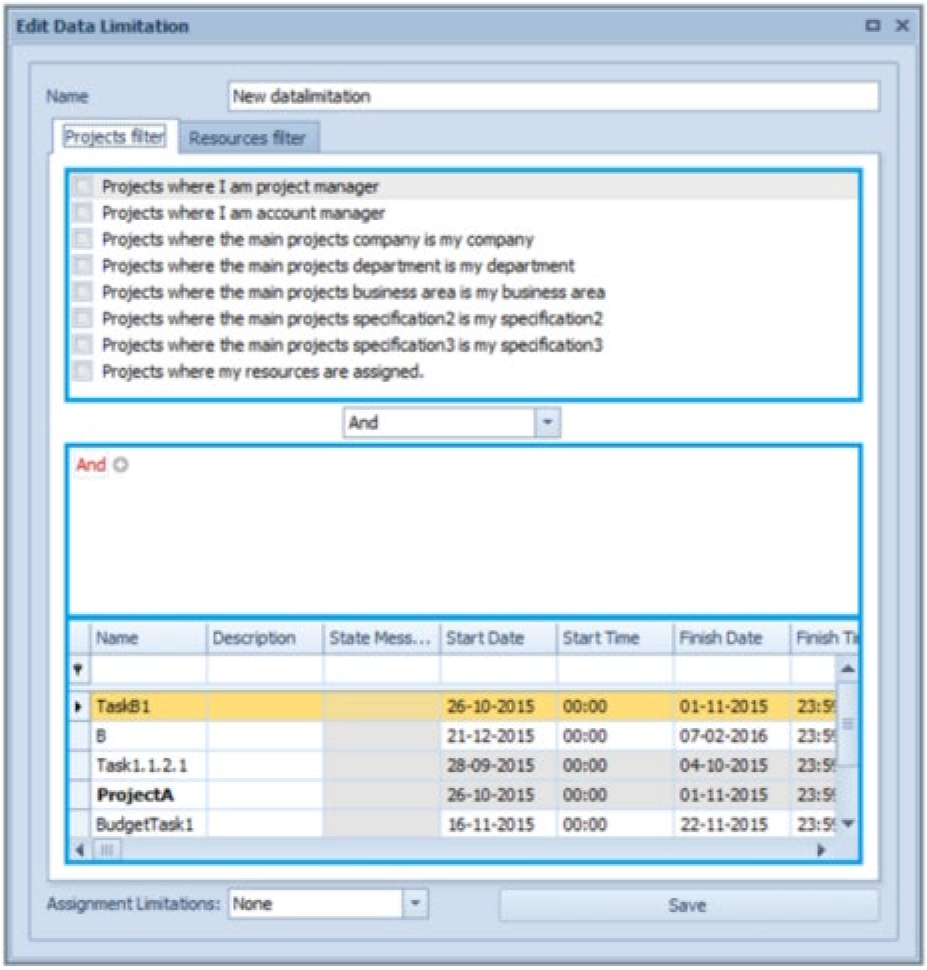
The following two figures show the **Projects filter** tab and the **Resources filter** tab, respectively. You can also see the **Assignment Limitations** drop-down list at the bottom of each figure.





Each tab consists of three parts:

- The upper part provides some specialized filters.
- The middle part provides more generalized filters.
- The grid below those parts acts as a preview of the effect of the data limitation.



Specialized Projects Tab Filters

The specialized Projects tab filters consist of two parts:

- The first part relates to a property of the project that you want to have satisfied
- The second part relates to a property that the logged-in user has.

Expression	Description
Projects where I am project manager	Displays only the projects that have the logged-in user assigned as the Project Manager.
Projects where I am account manager	Displays only the projects that have the logged-in user assigned as the Account Manager.
Projects where the main project’s company is my company	Displays only the projects that are done by the company where the logged-in user works. Projects that are done by another company, such as a subcontractor, are not displayed.

Expression	Description
Projects where the main project's department is my department	Displays only the projects that are done by the responsible department where the logged-in user works.
Projects where the main project's business area is my business area	Displays only the projects that have the same business area as the logged-in user.
Projects where the main project's specification2 is my specification2	Displays only the projects that have the same specification2 area as the logged-in user. You can use the specification2 field for customization.
Projects where the main project's specification3 is my specification3	Displays the same information as for specification2.
Projects where my resources are assigned	Displays only the projects where at least one of the employees of the logged-in user's resources has been assigned.

Specialized Resources Tab Filters

The specialized Resources tab filters consist of two parts:

- The first part relates to a property of the resource that you want to have satisfied.
- The second part relates to a property that the logged-in user has.

Expression	Description
Resources where I am resource manager	Displays only the employees of the logged-in user.
Resources with same company as my company	Displays only the resources who work in the same company as the logged-in user.
Resources with same department as my department	Displays only the resources who work in the same department as the logged-in user.
Only the logged-in resource	Displays only the logged-in user.

Generalized Filters

For the most part, the generalized filters only relate to the project or the resource, and not to the logged-in user.

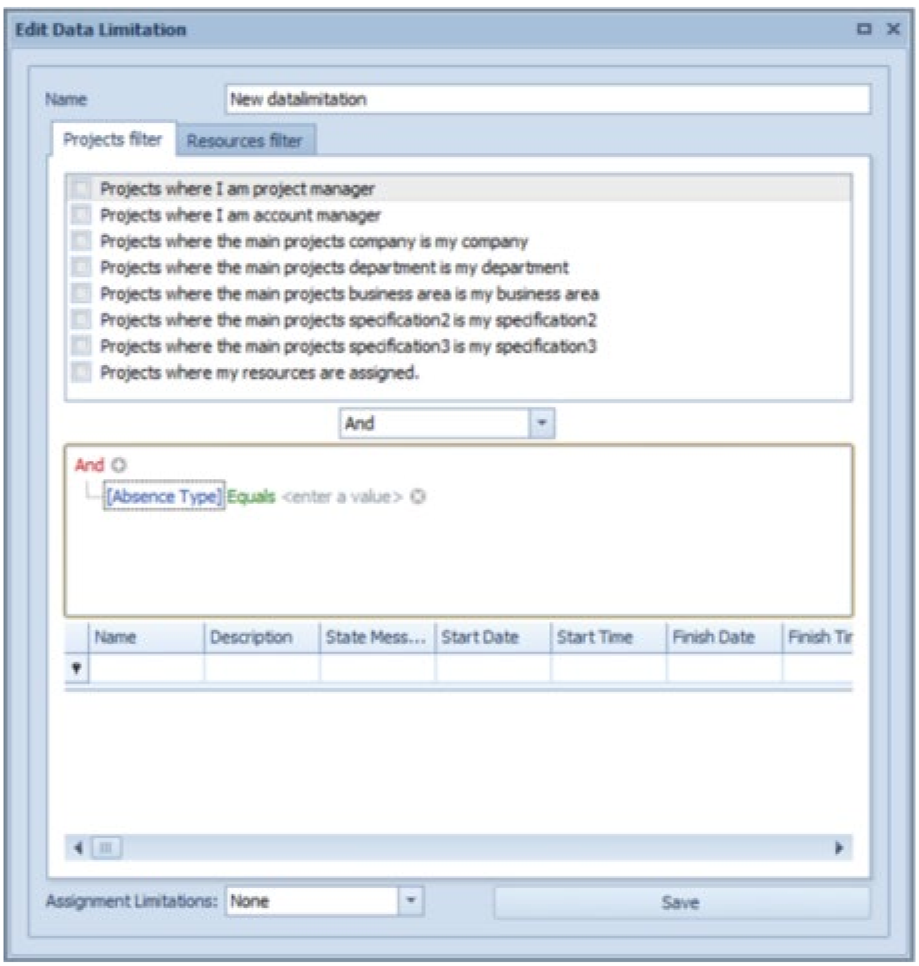
Note: Although the name of the first tab is Projects filter, this part of the data limitation is actually more general in that the generalized filter works on all of the types of events. *Event* is the term used to describe the individual lines in a project: the project, tasks, summaries, absences, and milestones.

For example, a project, “ProjectX,” has a single task named “TaskX.” You then define a generalized filter that allows exactly those events through whose name starts with a “T.” The result of this filter is that the event named “ProjectX” is not displayed, but the event named “TaskX” is displayed.

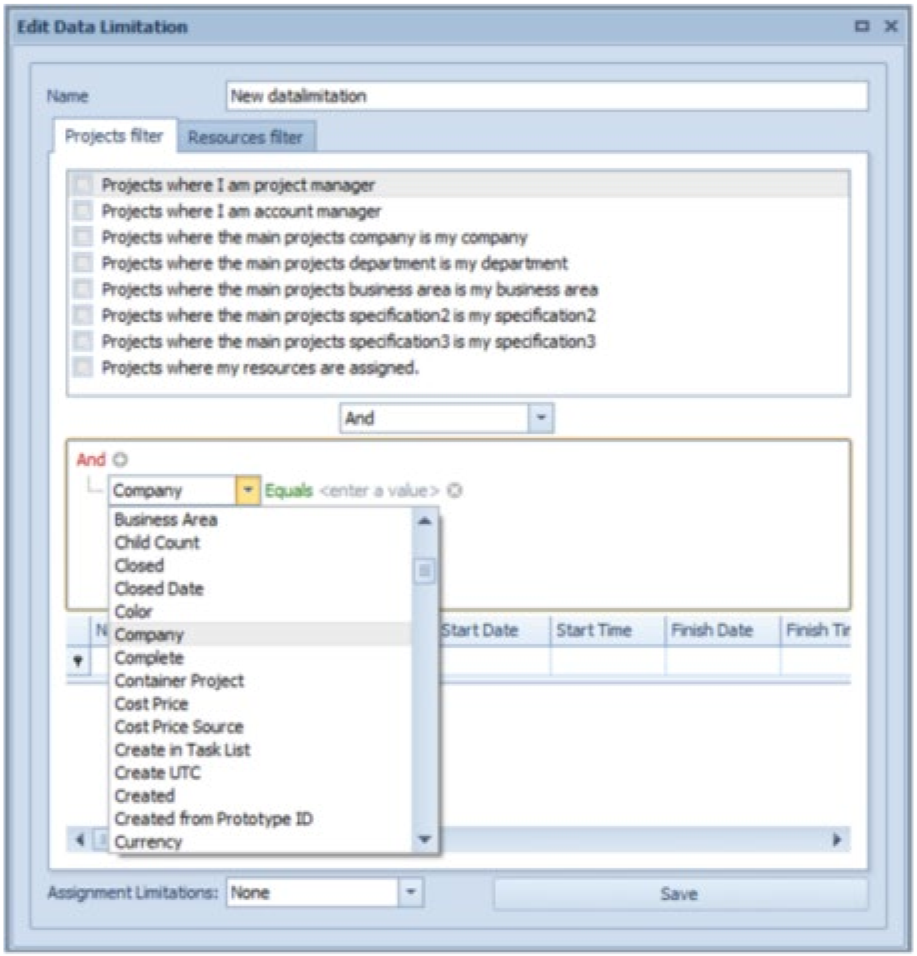
To define a filter:

1. Click the small **+** button.

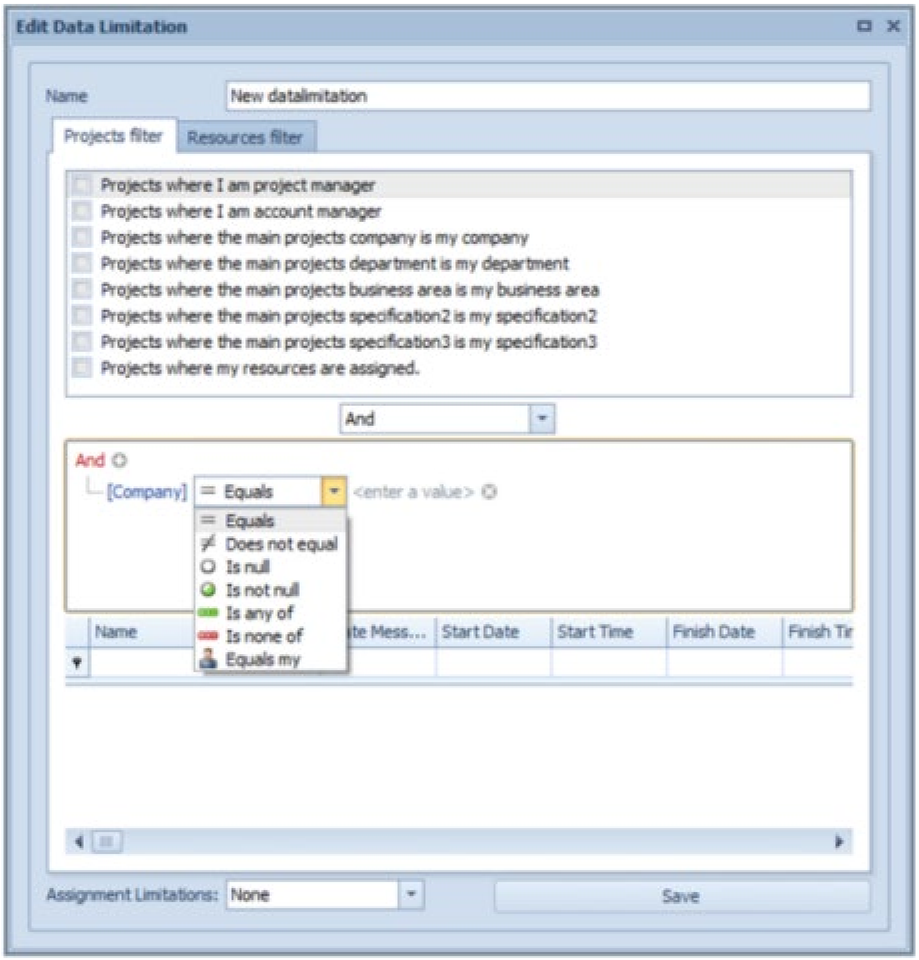
   This adds a line where you can define the conditions. To begin with, it says “Absence Type,” but you can disregard this. This is just the default value, which you can change to something else. The following figure shows an example.



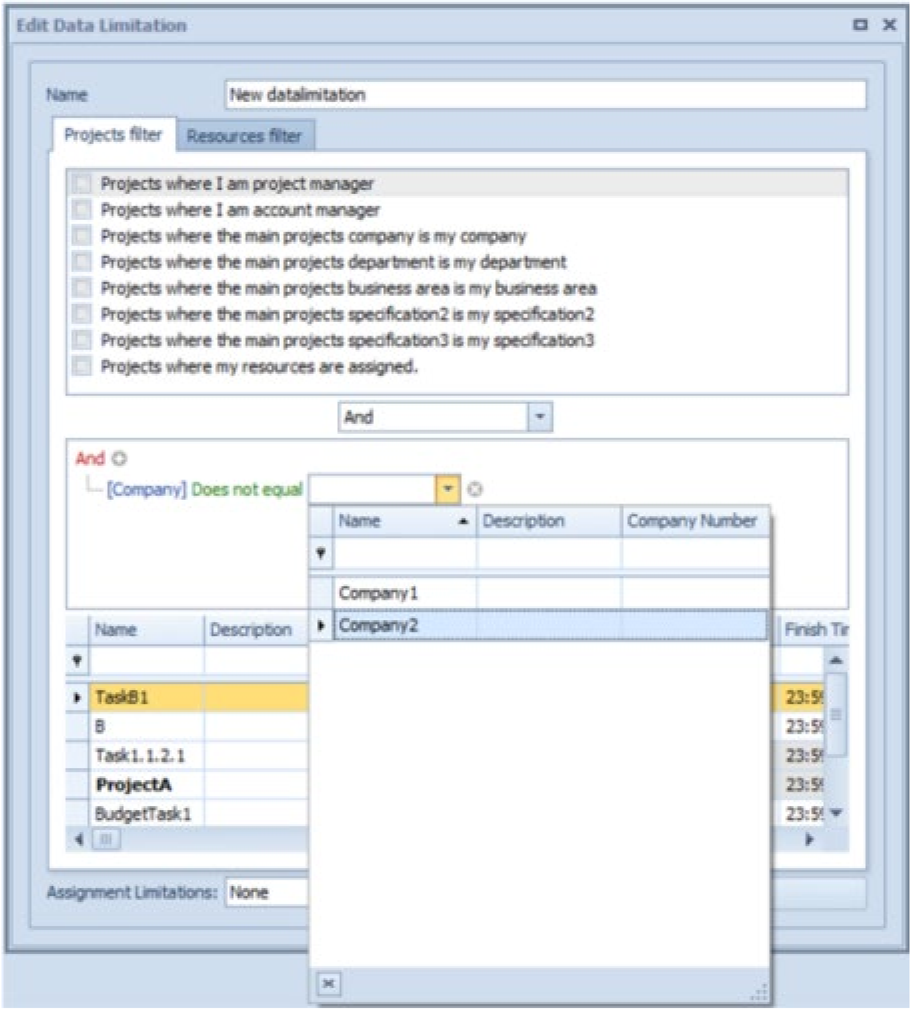
2. Click on the **first field** and select a column, for example, **Company**. The following figure shows an example.



3. Click on the **second field**, and choose a logical operator, for example, **Does not equal**. The following figure shows an example.



4. Click on the **third field** and choose a value. The following figure shows an example where the value Company2 is chosen.



The available logical operators depend on the data type of the column. The columns in People Planner can be of the types described in the following table.

Type	Description
Date	A column that contains a date. Examples of this are the columns for Close Date, Start, and Finish.
Numeric	A column that contains a number. Examples of this are the columns Allocated, ERP Probability, and Sales Price.
Flag	A column that contains a check box. Examples of this are the columns Closed, Is Approved, and Unassigned. **Note**: People Planner treats Flag columns as a special case of the Numeric data type, where 0 = is not selected, and 1 = is selected.
Lookup	A column that can only contain values that are defined in a list that is defined somewhere else—usually as one of the Dimensions. Examples of this are the columns Company, Main Project, and Resource Category.

Type	Description
Text	A column that contains text. Examples of this are the columns Local Spec 1, Name, and Project Number.

Depending on the data type, the logical operators that the following table shows are available.

Operator	Data Type				Description	Opposite of
	Date	Numeric	Lookup	Text		
Begins with				X	The text must start with the specified value.	
Contains				X	The specified value must appear somewhere in text.	Does not contain
Does not contain				X	The specified value may not appear anywhere in the text.	Contains
Does not equal	X	X	X	X	The value of the column must be different from the specified value.	Equals
Ends with				X	The text must end with the specified value.	
Equals	X	X	X	X	The value of the columns must be the same as the specified value.	Does not equal
Equals mine			X		The value of the column must be the same value as the value in the specified column of the logged-in user. Example: [Company] Equals mine Company.	
Equals my				X	This operator does the same as the “Equals mine,” but for text columns.	
Is any of	X	X	X	X	The specified value is a list of values, and the value of the column must be in the list.	Is none of
Is between	X	X		X*	The specified value consists of a lower and an upper bound, and the value of the column must be between the two bounds.	Is not between

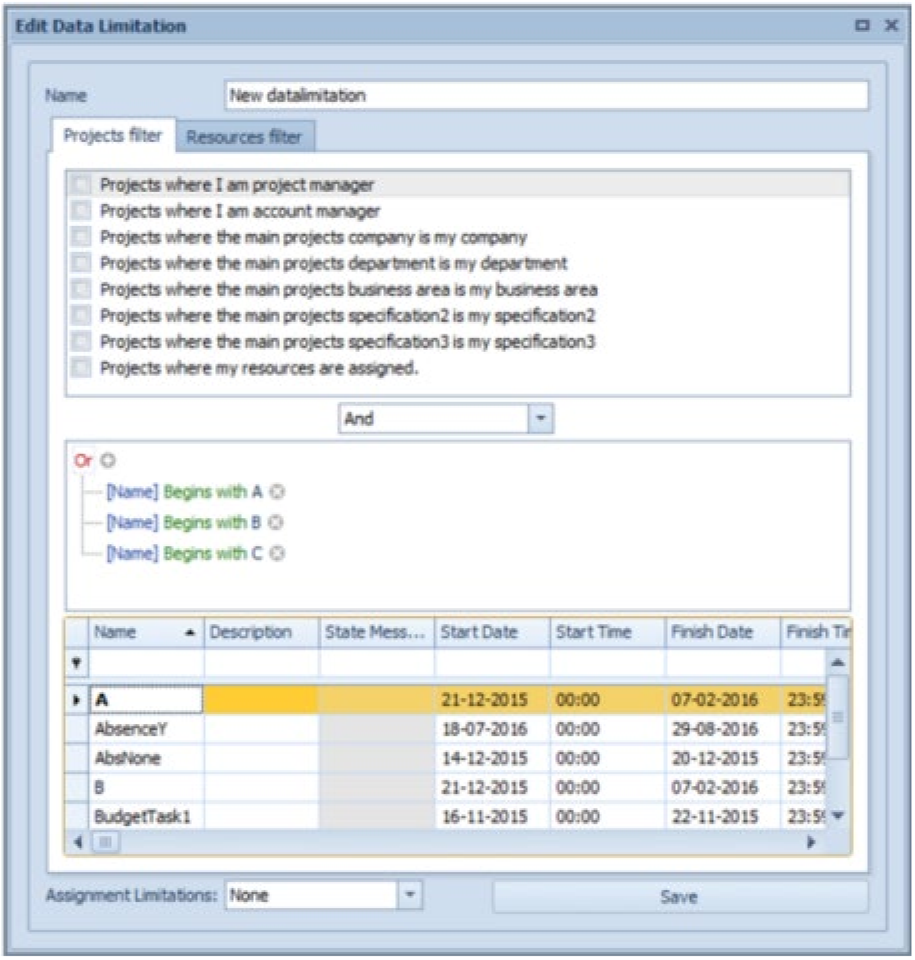
Operator	Data Type				Description	Opposite of
Is beyond this year	X				The date must be in the year after today's year or further into the future.	
Is blank				X	The text must be blank. This is the same as the "Is null" operator.	Is not blank
Is earlier this month	X				The date is in this month and before today's date.	
Is earlier this week	X				The date is in this week and before today's date.	
Is earlier this year	X				The date is in this year and before today's date.	
Is greater than	X	X		X*	The value of the column must be greater than the specified value.	Is less than or equal to
Is greater than or equal to	X	X		X*	The value of the column must be equal to or greater than the specified value.	Is less than
Is last week	X				The date is in the week before today's week.	
Is later this month	X				The date is in this month and after today's date.	
Is later this week	X				The date is in this week and after today's date.	
Is later this year	X				The date is in this year and after today's date.	
Is less than	X	X		X*	The value of the column must be less than the specified value.	Is greater than or equal to
Is less than or equal to	X	X		X*	The value of the column must be less than the specified value.	Is greater than
Is like				X	People Planner supports two wildcards: ▪ '_' : matches exactly 1 character. ▪ '%' : matches 0 to any number of characters. Example: [Name] Is like "_rojec%" means that the text of the column:	Is not like

Operator	Data Type				Description	Opposite of
					1. Must start with any character, then 2. Must continue with the exact text “rojec,” and 3. The finish is not important. Example: the text can be “Project” but not, for example, “Protect.”	
Is next week	X				The date is in the week after today’s week.	
Is none of	X	X	X	X	The specified value is a list of values, and the value of the column must not be in the list.	Is any of
Is not between	X	X		X*	The specified value consists of a lower and an upper bound, and the value of the column must not be between the two bounds.	Is between
Is not blank				X	The text must not be blank. This is the same as the “Is not null” operator.	Is blank
Is not like				X	See the examples for the “Is like” operator.	Is like
Is not null	X	X	X		A value must have been selected in the column. This is the same as the “Is not blank” operator for text columns.	Is null
Is null	X	X	X		A value must not have been selected in the column. This is the same as the “Is blank” operator for text columns.	Is not null
Is prior to this year	X				The date must be in the year before today’s year or further into the past.	
Is today	X				The date must be today’s date.	
Is tomorrow	X				The date must be the day after today’s date.	
Is yesterday	X				The date must be the day before today’s date.	

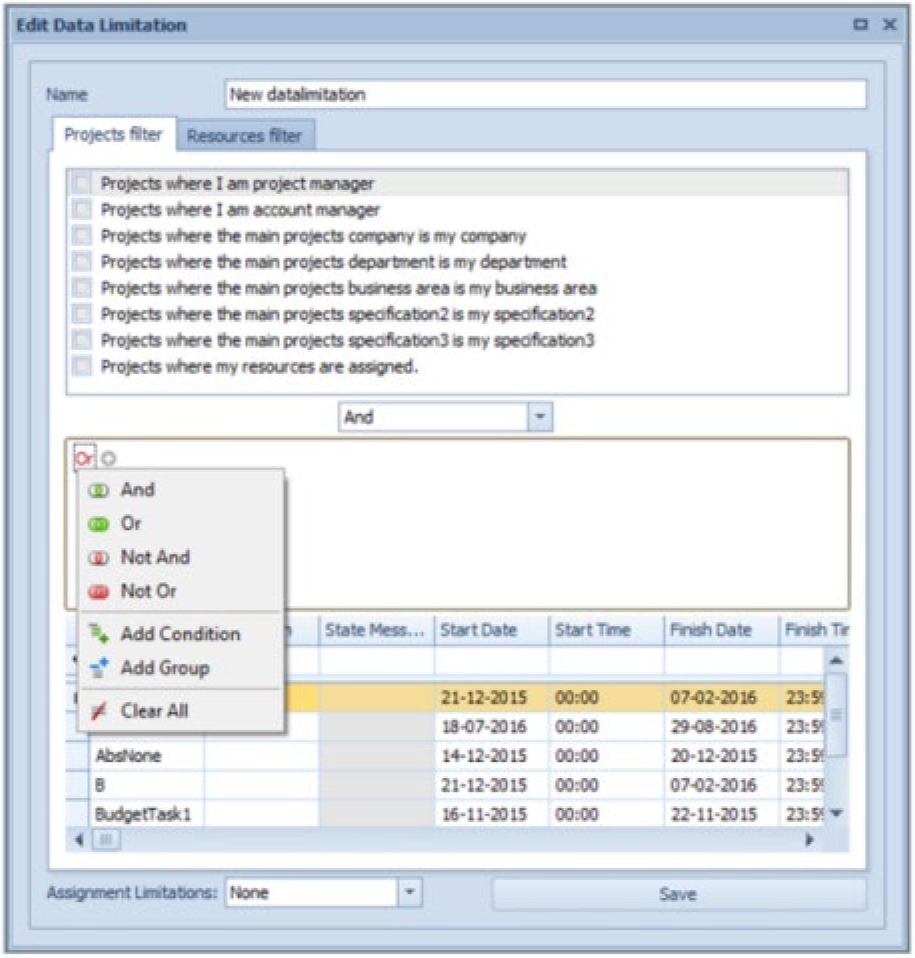
(*) For text-columns, the ordering used is the lexicographical ordering—that is, the order in which the words are sorted in a lexicon.

> **Note:** You can configure SQL Server to be either case-insensitive or case-sensitive—that is, where “a” is considered to be different from “A.” The recommendation is to choose case-insensitive because the alternative will yield counterintuitive results like “A” < “Z” < “a” < z.

You can combine one or more conditions in a data limitation. You add each new condition by clicking the **+** button. The following figure shows an example of three conditions that have been combined.



You may often need to change the root operator—the operator at the top of the list of operators, which defaults to “And”—from “And” to, for example, “Or,” or the data limitation will not let anything through. You can do this by clicking the root operator. This opens a menu where you can select between alternative operators.

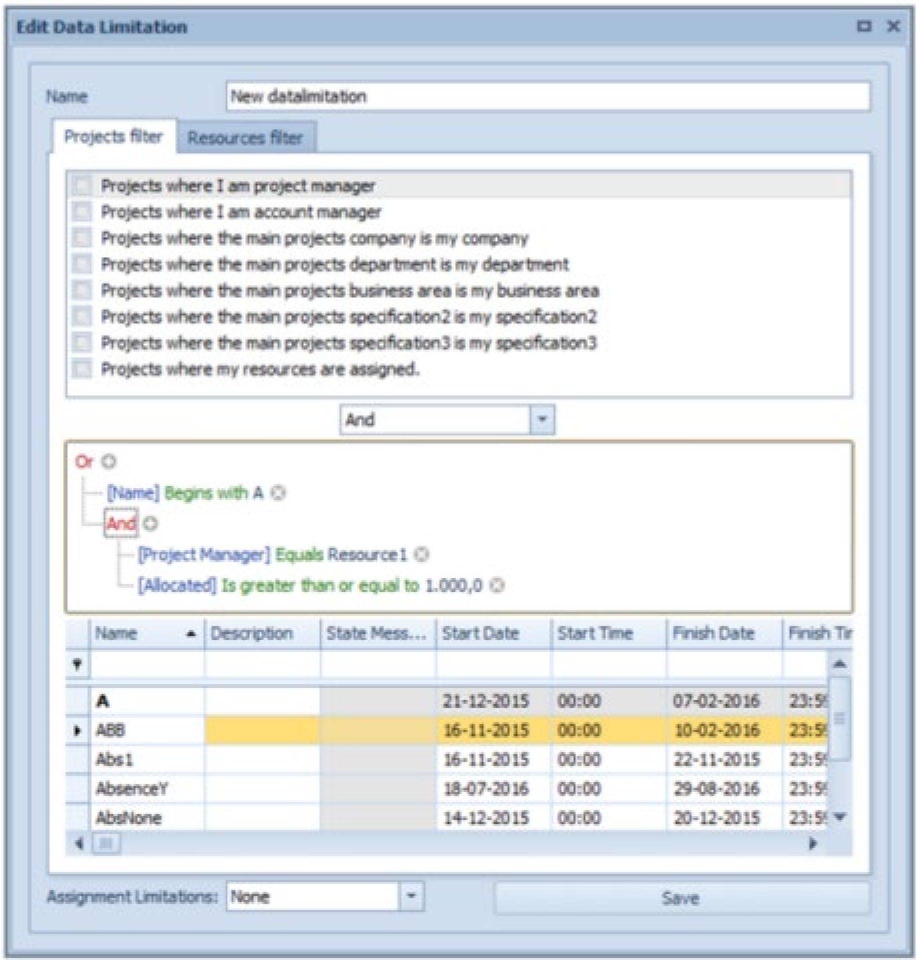


This menu also supports the composition of more complex conditions.

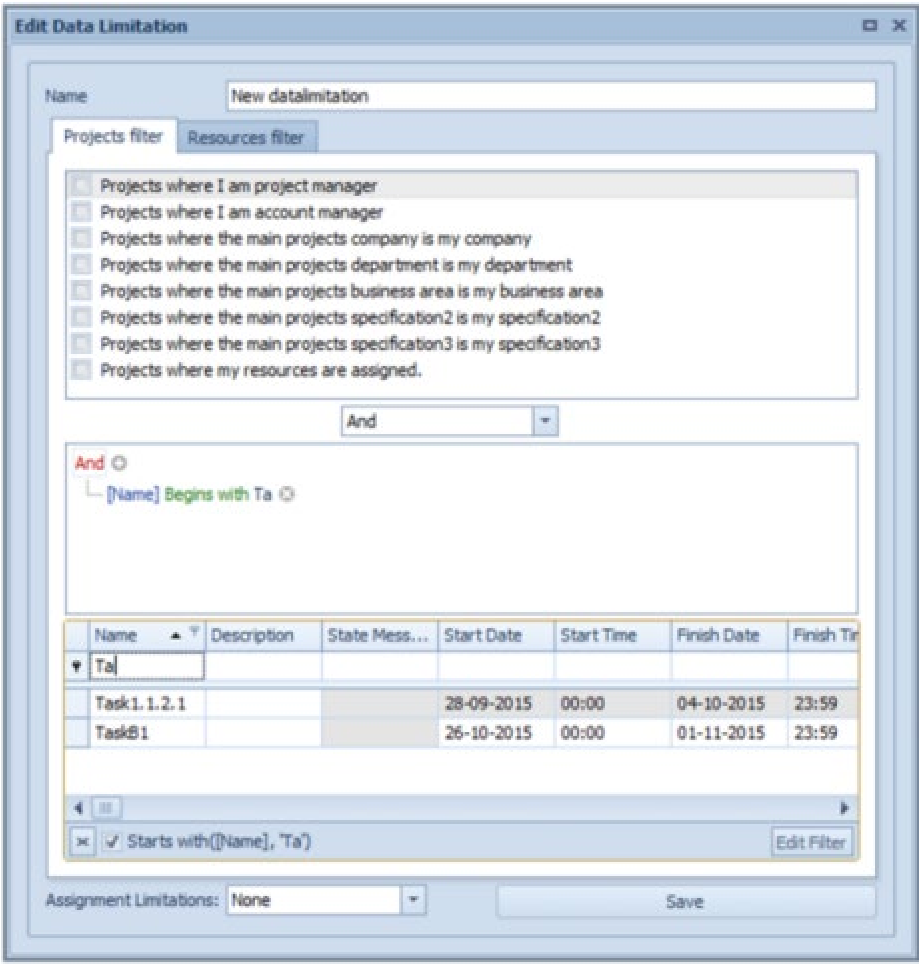
Option	Description
And	All of the conditions must be satisfied.
Or	At least one of the conditions must be satisfied.
Not And	Exactly one of the conditions must be satisfied. If two or more of the conditions happen to be satisfied, the composition condition is not. **Note**: This operator is also known as “Xor.”
Not Or	**None** of the conditions are satisfied.
Add Condition	Adds a new condition; this is exactly the same as clicking the **+** button.
Add Group	You use groups to define more complex conditions that would normally require parentheses.
Clear All	Deletes the conditions from the group.

You can use groups when you need to define more complex conditions. The following example shows a condition that is equal to:

(Name Begins-With “A”) OR (ProjectManager = Resource1 AND AllocatedHours >= 1000)



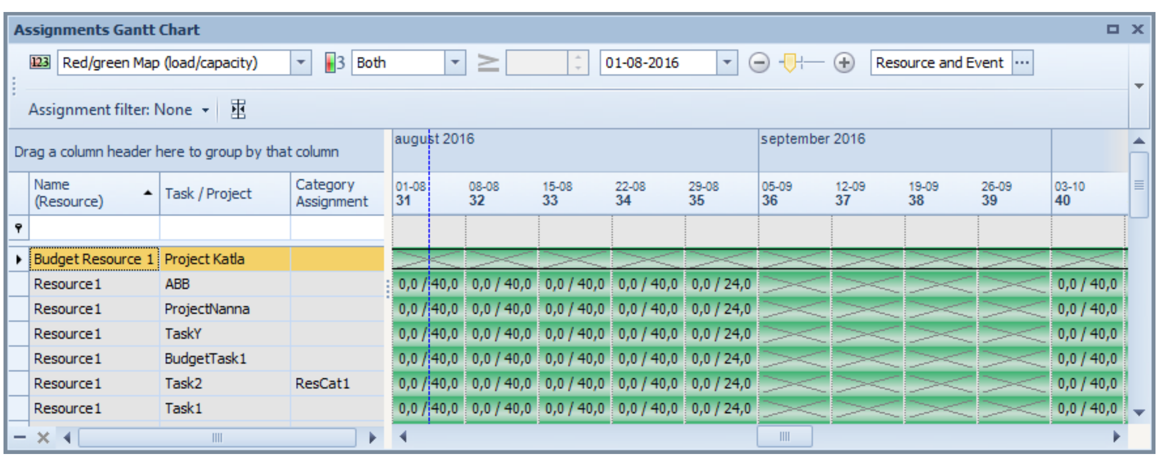
The preview-grid displays the result of the combined conditions, but you can also use it as a tool to assist you in building the condition. If you enter a filter condition somewhere in the filter line of the grid, the corresponding condition is automatically added. The following figure shows an example where the Name column is filtered on “Ta.”



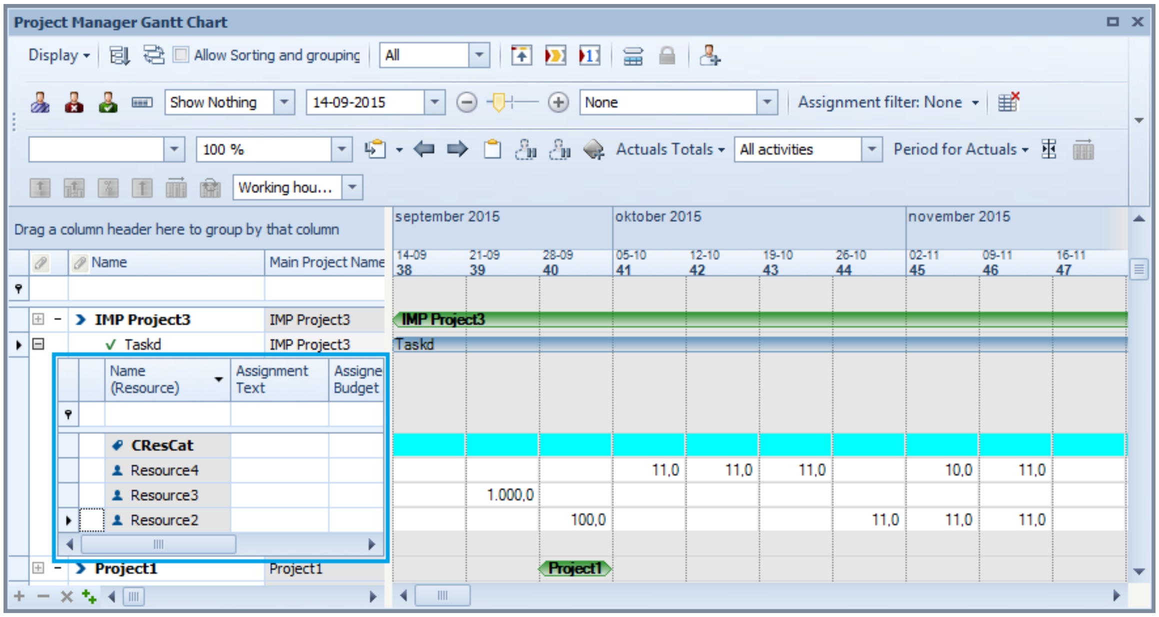
Assignment Limitations Filters

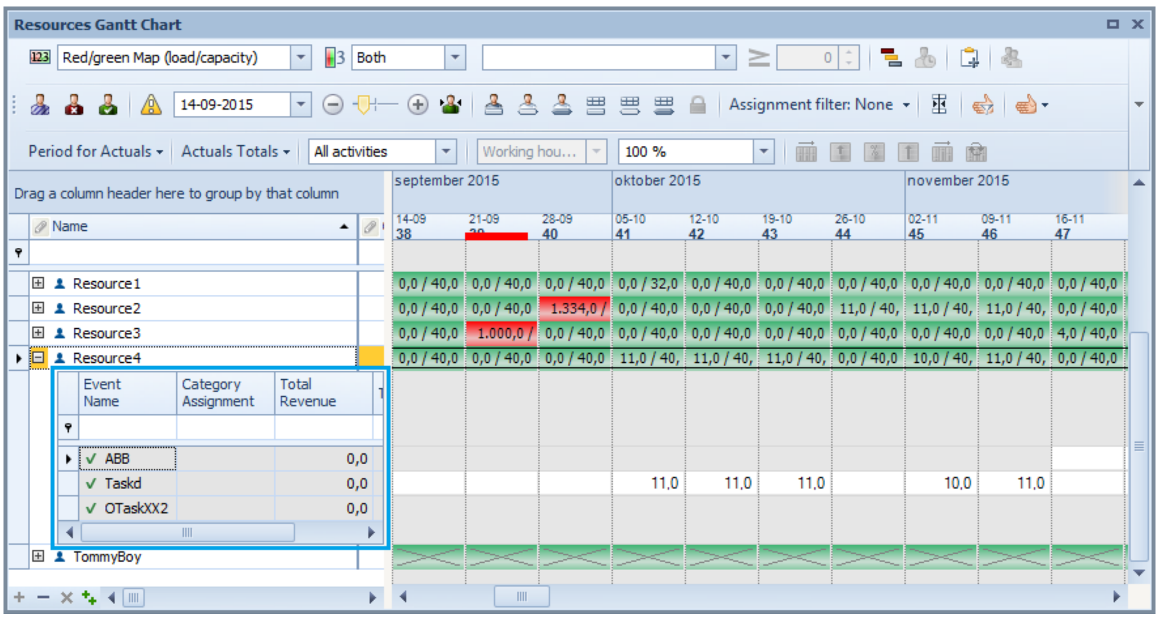
Assignment Limitations filters combine the filtering of the Projects filter with the Resources filter and applies them to assignments. This functionality was introduced with People Planner 3.6.

Assignments can be seen in the People Planner application in various places. The Assignments Gantt Chart is the most obvious of these.



The Project Gantt (PG) and the Resource Manager Gantt (RG) charts also show assignments. However, in those views this is not entirely obvious to users, because what they see is a list of resources and events, respectively.





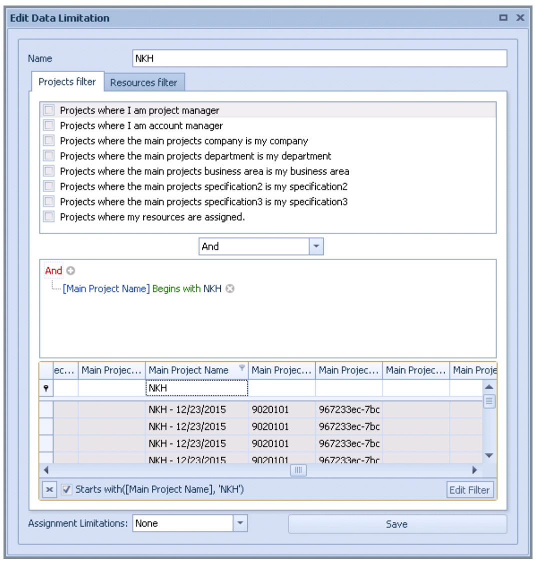
It is important to realize that a data limitation with only an event part or only a resource part does not act directly on assignments.

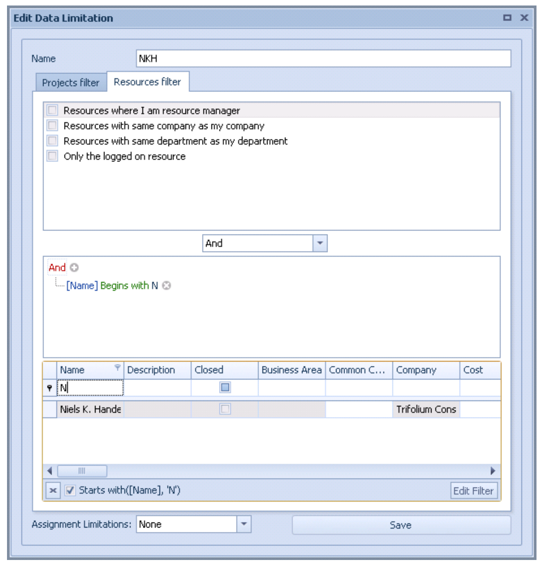
For example: If you have defined a data limitation that filters on, say, events, and that data limitation lets only those events through where the name begins with an “A,” this will not filter the assignment sub-grid in the RG. This will still display events such as “Taskd” or “OTaskXX2,” even though the names of these do not begin with an “A.” This is because the sub-grid is actually showing assignments, not events.

An assignment has both an event and a resource part. Assignment limitations are used to filter the assignments by applying either or both of the Projects filter and the Resources filter on the assignments. You can set the Assignment Limitations part of the data limitation to one of the following options:

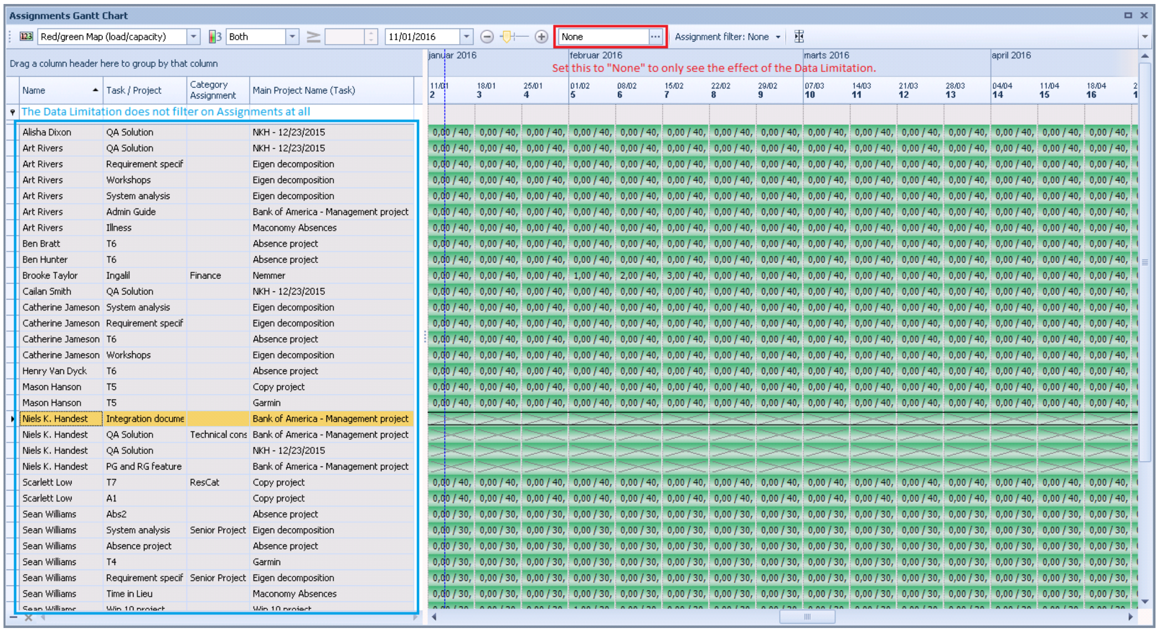
- None
- Resource
- Event
- Resource or event
- Resource and event

For example: Assume that you have defined the following data limitation with both a Projects filter and a Resources filter.



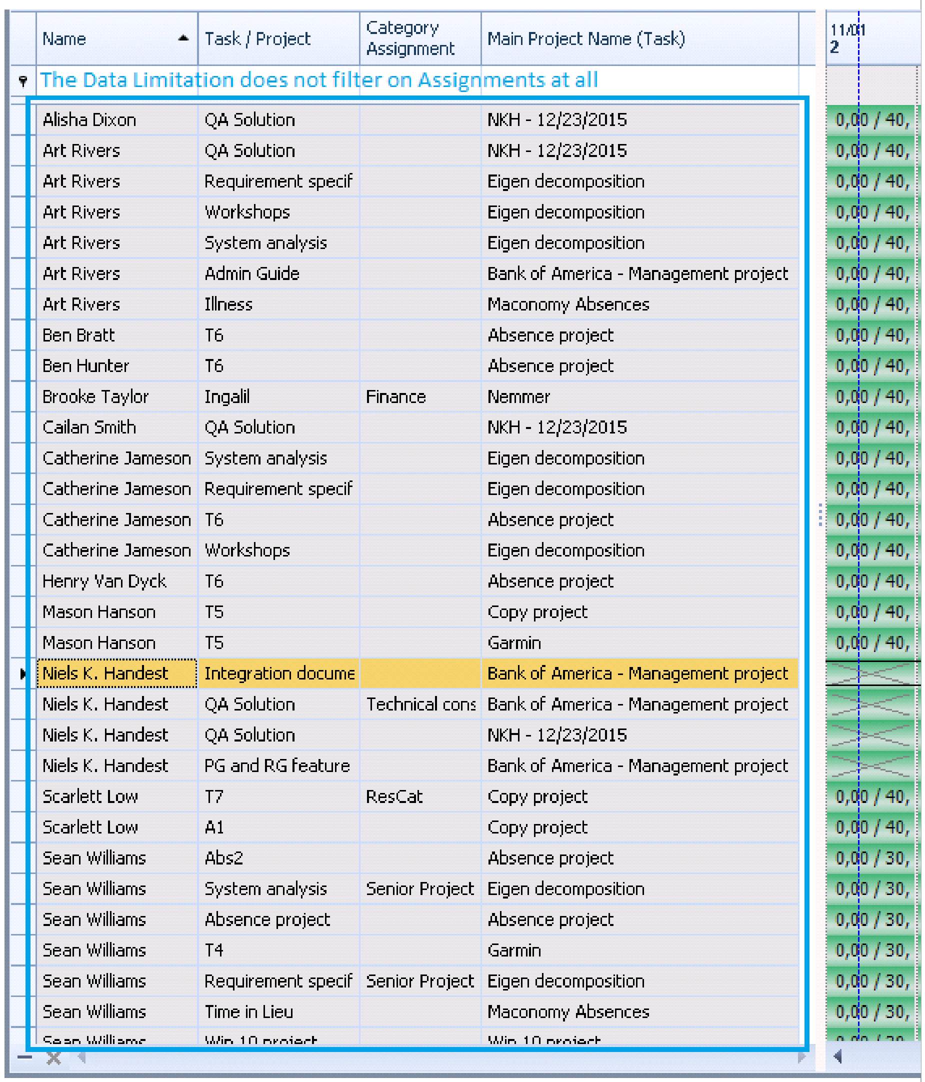


You can then select one of the five options of the Assignment Limitations; the effect is best illustrated using the Assignment Gantt (AG) chart, as the following figure shows.


Assignments Gantt Chart
Red/green Map (load/capacity)
Both
11/01/2016
None
Assignment filter: None
Drag a column header here to group by that column
Set this to "None" to only see the effect of the Data Limitation.
Name
Task / Project
Category Assignment
Main Project Name (Task)
The Data Limitation does not filter on Assignments at all

The following table illustrates the effects of the options of the Assignment Limitations filters part of a data limitation.

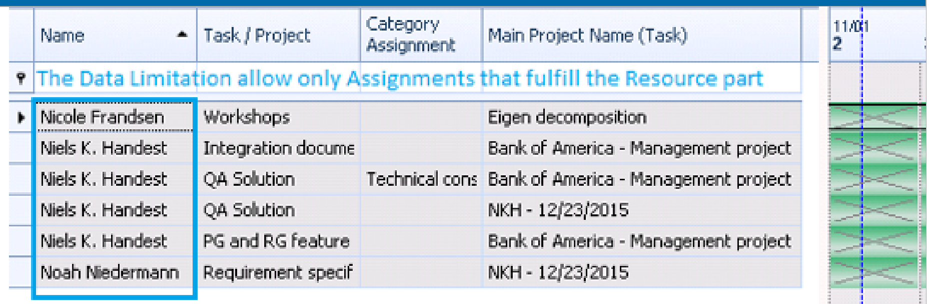
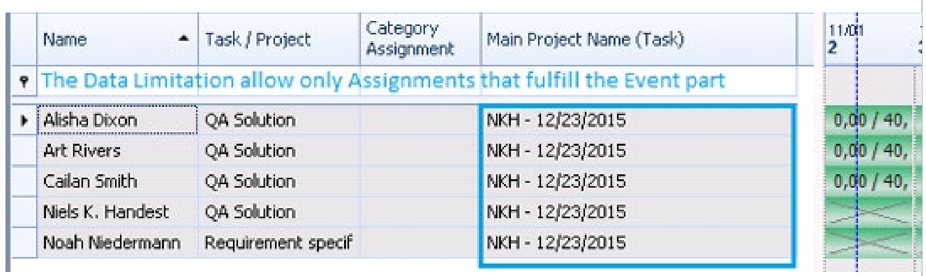
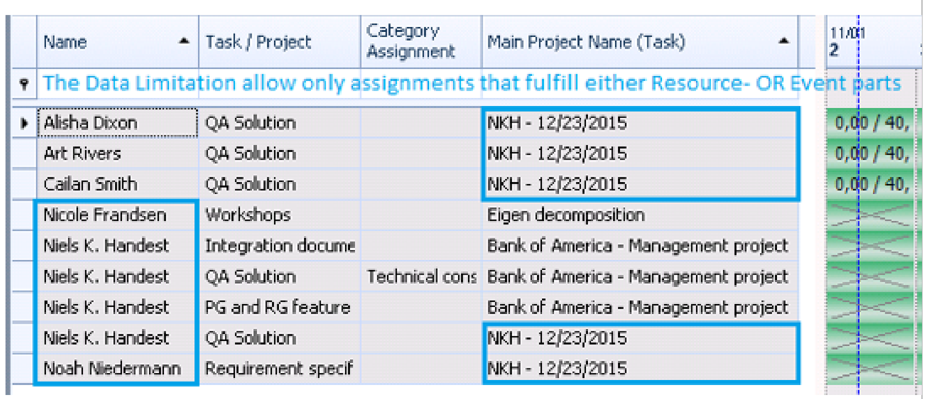
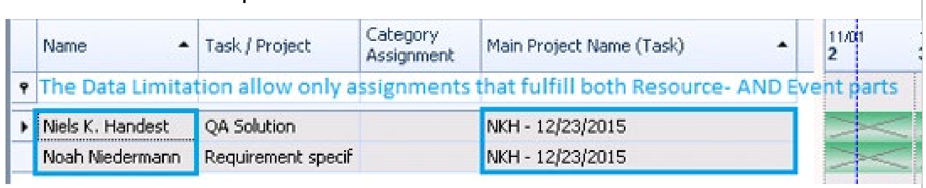
Assignment Limitations	Description
None	The data limitation does not filter on assignments at all. This is the same behavior as prior to People Planner 3.6.



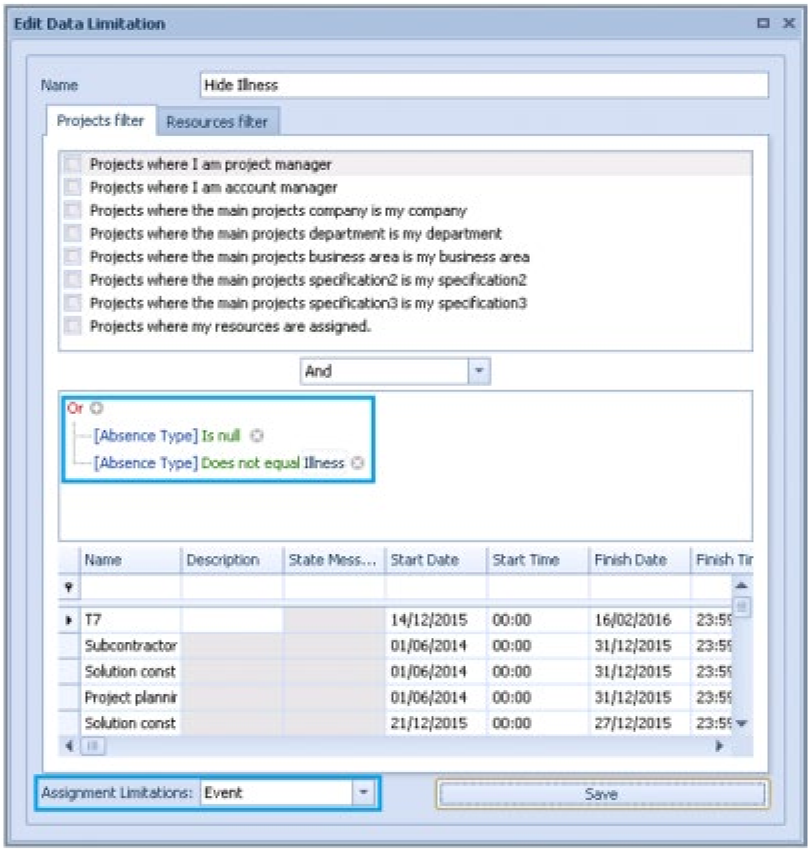
The Data Limitation does not filter on Assignments at all

Name	Task / Project	Category Assignment	Main Project Name (Task)	11/01 2
Alisha Dixon	QA Solution		NKH - 12/23/2015	0,00 / 40,
Art Rivers	QA Solution		NKH - 12/23/2015	0,00 / 40,
Art Rivers	Requirement specif		Eigen decomposition	0,00 / 40,
Art Rivers	Workshops		Eigen decomposition	0,00 / 40,
Art Rivers	System analysis		Eigen decomposition	0,00 / 40,
Art Rivers	Admin Guide		Bank of America - Management project	0,00 / 40,
Art Rivers	Illness		Maconomy Absences	0,00 / 40,
Ben Bratt	T6		Absence project	0,00 / 40,
Ben Hunter	T6		Absence project	0,00 / 40,
Brooke Taylor	Ingalil	Finance	Nemmer	0,00 / 40,
Cailan Smith	QA Solution		NKH - 12/23/2015	0,00 / 40,
Catherine Jameson	System analysis		Eigen decomposition	0,00 / 40,
Catherine Jameson	Requirement specif		Eigen decomposition	0,00 / 40,
Catherine Jameson	T6		Absence project	0,00 / 40,
Catherine Jameson	Workshops		Eigen decomposition	0,00 / 40,
Henry Van Dyck	T6		Absence project	0,00 / 40,
Mason Hanson	T5		Copy project	0,00 / 40,
Mason Hanson	T5		Garmin	0,00 / 40,
Niels K. Handest	Integration docume		Bank of America - Management project	
Niels K. Handest	QA Solution	Technical cons	Bank of America - Management project	
Niels K. Handest	QA Solution		NKH - 12/23/2015	
Niels K. Handest	PG and RG feature		Bank of America - Management project	
Scarlett Low	T7	ResCat	Copy project	0,00 / 40,
Scarlett Low	A1		Copy project	0,00 / 40,
Sean Williams	Abs2		Absence project	0,00 / 30,
Sean Williams	System analysis	Senior Project	Eigen decomposition	0,00 / 30,
Sean Williams	Absence project		Absence project	0,00 / 30,
Sean Williams	T4		Garmin	0,00 / 30,
Sean Williams	Requirement specif	Senior Project	Eigen decomposition	0,00 / 30,
Sean Williams	Time in Lieu		Maconomy Absences	0,00 / 30,
Sean Williams	Win 10 project		Win 10 project	

Assignment Limitations	Description
Resource	The data limitation displays only those assignments that fulfill the resource part.

Assignment Limitations	Description
	
Event	The data limtation displays only those assignments that fullfill the event part. 
Resource or Event	The data limitation displays only those assignments that fulfill either the resource or the event part (or both). 
Resource and Event	The data limitation shows only those assignments that fullfill both the resource and event parts. 

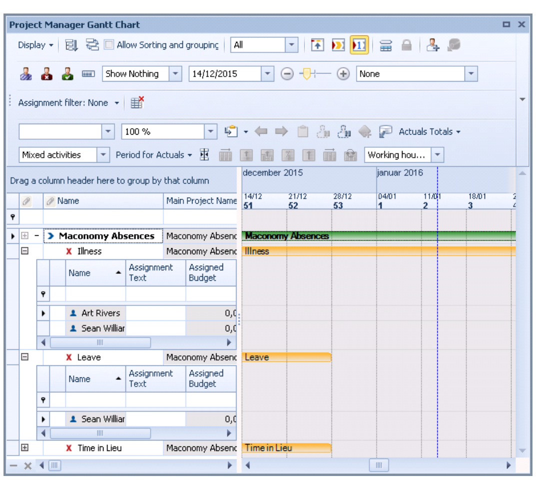
Regulatory requirements for absence management demand that some types of absence may not be generally visible to just anybody—for example, illness. You can achieve this with the following data limitation.

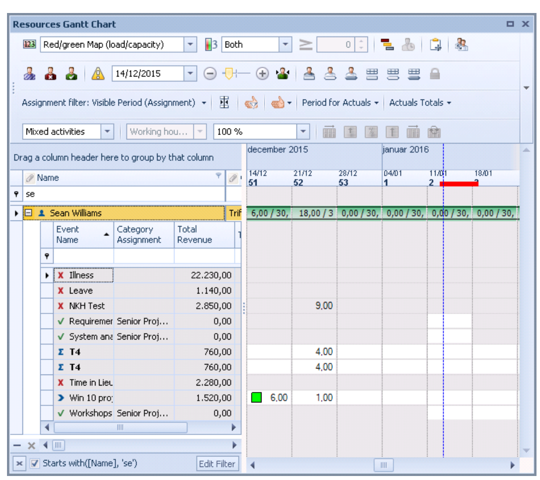


This data limitation does not have a Resources filter component because you are only interested in filtering out absences or assignments on absences.

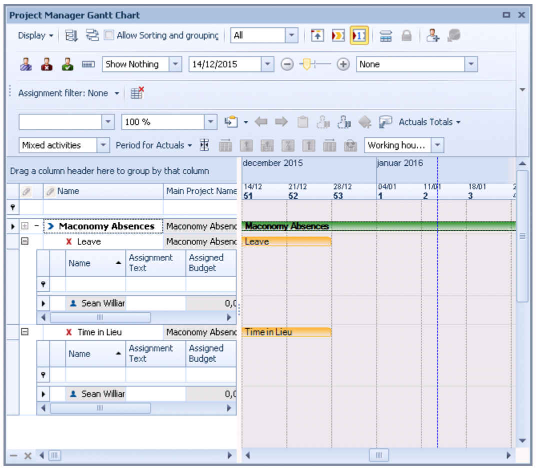
> **Warning:** If you do not add the “Is null” clause, People Planner does not display the events that do not have an absence type at all. That is, it does not display most of the events that make up the projects.

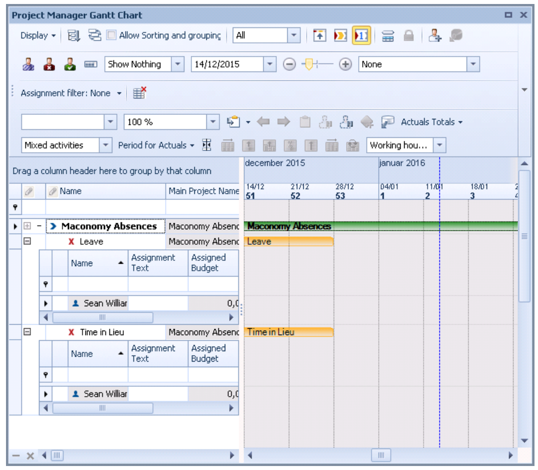
Without the data limitation, you can see the illness absence in the PG and the illness assignments in the sub-grid in the RG.





With the data limitation active, you do not see them.



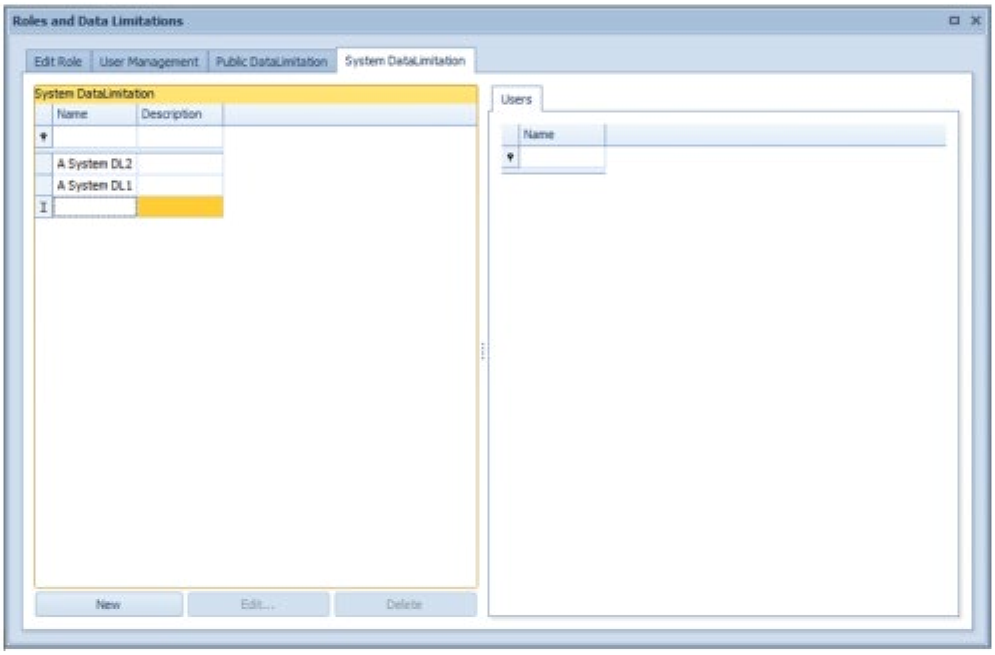


System Data Limitations

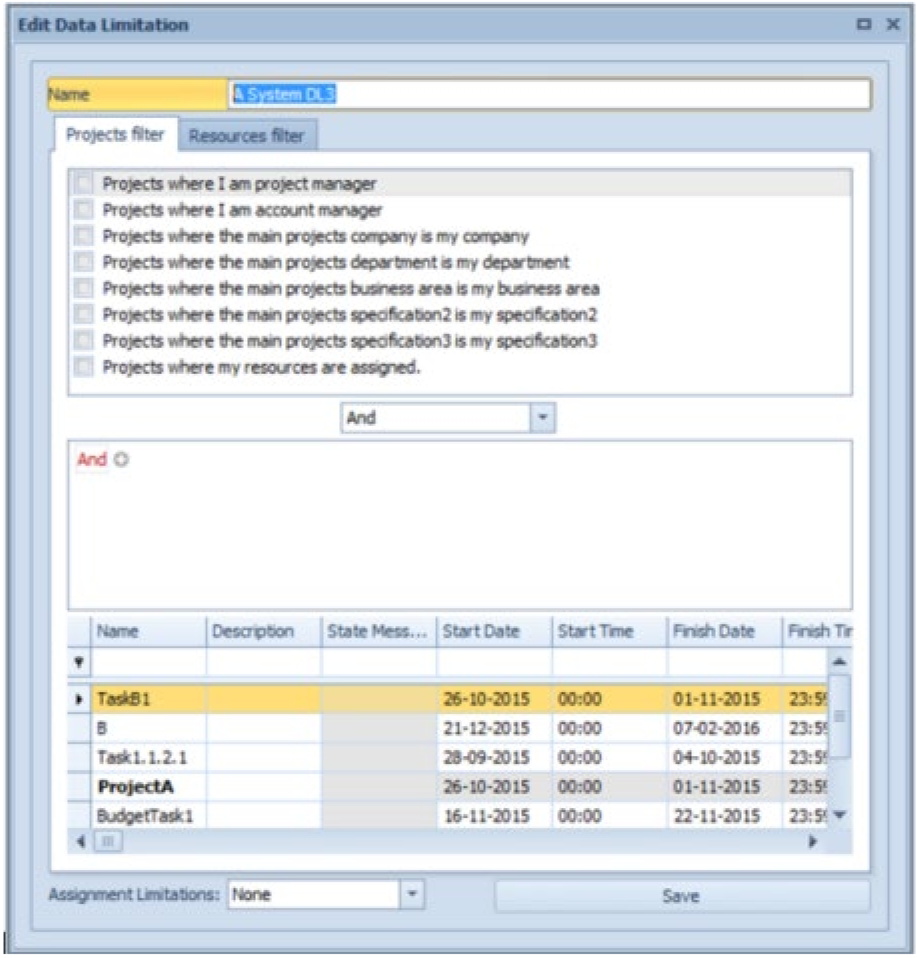
The People Planner administrator creates System Data Limitations. You use them to restrict the data that users are allowed to see.

To create a System Data Limitation:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the **System DataLimitation** tab.



3. Click the **New** button. This adds a row to the list of data limitations.
4. Give the new data limitation a name.
5. Click the **Edit …** button to define the details of the data limitation.

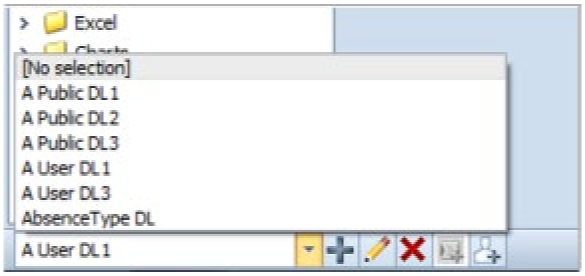


6. Edit the data limitation.
7. Click the **Save** button to save the data limitation.

Public Data Limitations

Whereas a user cannot decide which System Data Limitations to use, Public Data Limitations are treated the same as if the user created them.

A user can select between the personal User Data Limitations and the Public Data Limitations, created by the administrator, in the lower-left corner of the People Planner application's main window.



Note: Users cannot edit or delete Public Data Limitations. Only an administrator can do this.

Roles

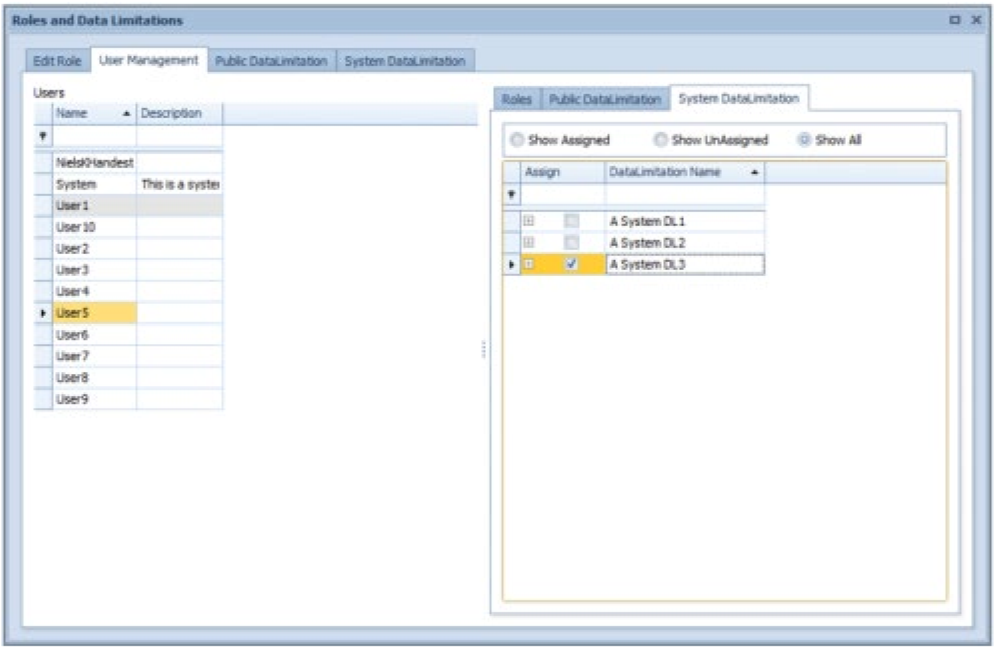
Creating a System or a Public Data Limitation is identical to creating a User Data Limitation. Where they differ is that you can associate these two types of data limitations with users.

You can either link them directly, or you can define a link with a role as the intermediate:

- User ⇔ System or Public Data Limitation
- User ⇔ Role ⇔ System or Public Data Limitation

To assign a System or Public Data Limitation directly to a user:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the **User Management** tab.
3. Click on the user in the Users list.
4. Click the **System DataLimitation** tab in the right pane.
5. Select the **Show All** radio button.
6. Select the **Assign** check box for the System Data Limitation that you want to assign to the selected user.



Note: You can only assign a single System Data Limitation to a user. If you have already assigned one System Data Limitation to a user, and you then assign another, the first is unassigned. You can assign as many Public Data Limitations to a user as you want.

You are often interested in applying the same set of System or Public Data Limitations to more than one user. For this case, it makes better sense to define a role and assign the data limitations to role, and then assign the role to the users.

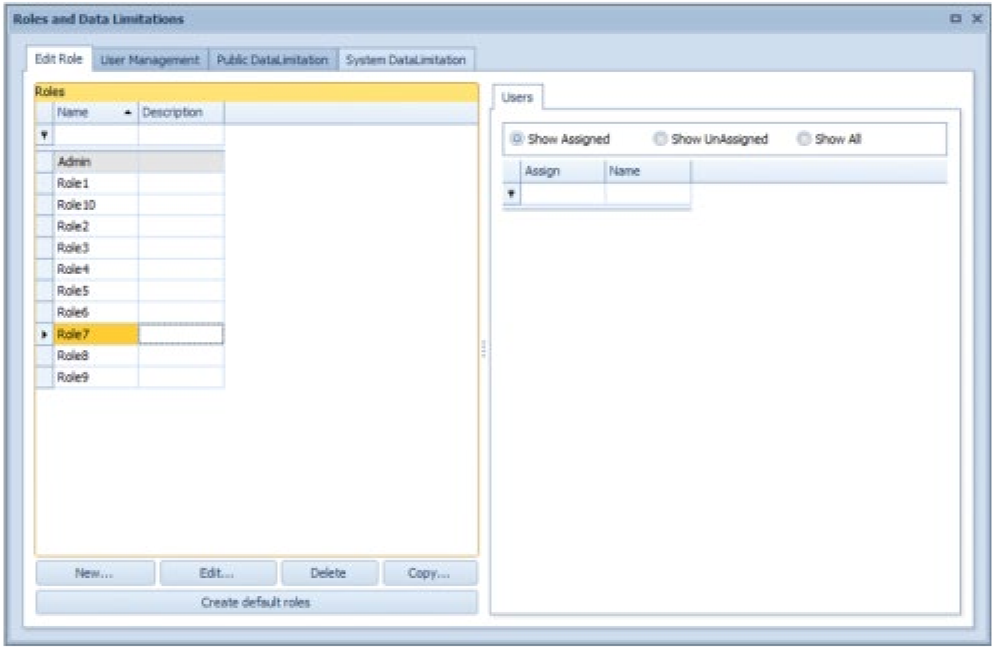
To assign a System or Public Data Limitation indirectly to a user, via a role, requires two steps:

1. Assigning the System or Public Data Limitation to the role.
2. Assigning the user to the role.

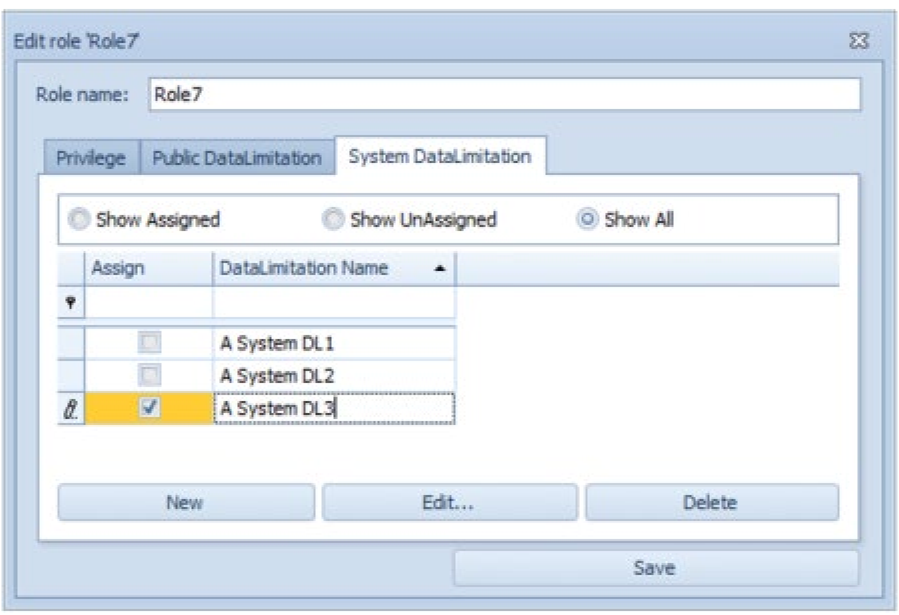
Assigning a System or Public Data Limitation to a role is similar to assigning one to a user.

To assign a System or Public Data Limitation to a role:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the **Edit Role** tab.
3. Click on the role in the **Roles** list.



4. Click the **Edit…** button to open the Edit role view.
5. Click the **System DataLimitation** tab.
6. Select the **Show All** radio button.
7. Select the **Assign** check box for the System Data Limitation that you want to assign to the selected role.



8. Click the **Save** button.

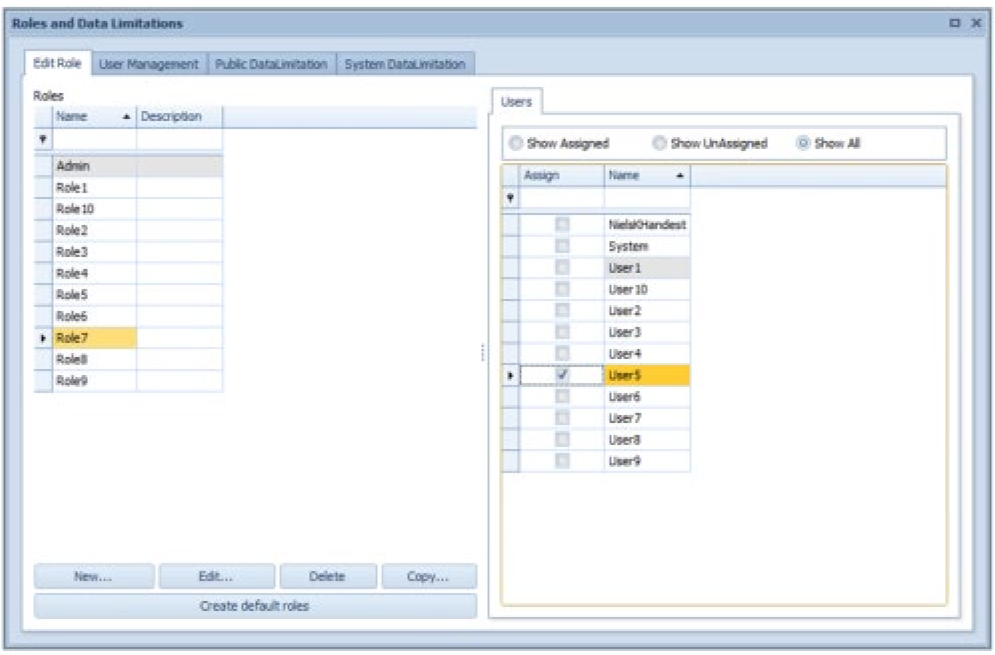
> **Note:** You can only assign a single System Data Limitation to a role. If you have already assigned one System Data Limitation, and you then assign another, the first is unassigned. You can assign as many Public Data Limitations to a role as you want.

> **Note:** You can assign as many roles to a user as you want, and by doing this you can assign more than one System Data Limitation to a user.

The second part of this process is to assign the user to the role, as follows.

To assign a user to a role:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the **Edit Role** tab.
3. Click on the role in the **Roles** list.
4. Select the **Show All** radio button in the **Users** tab in the right pane.
5. Click on the user's name in the **Name** column in the **Users** tab to select the user.
6. Select the **Assign** check box for the user to whom you want to assign the role.



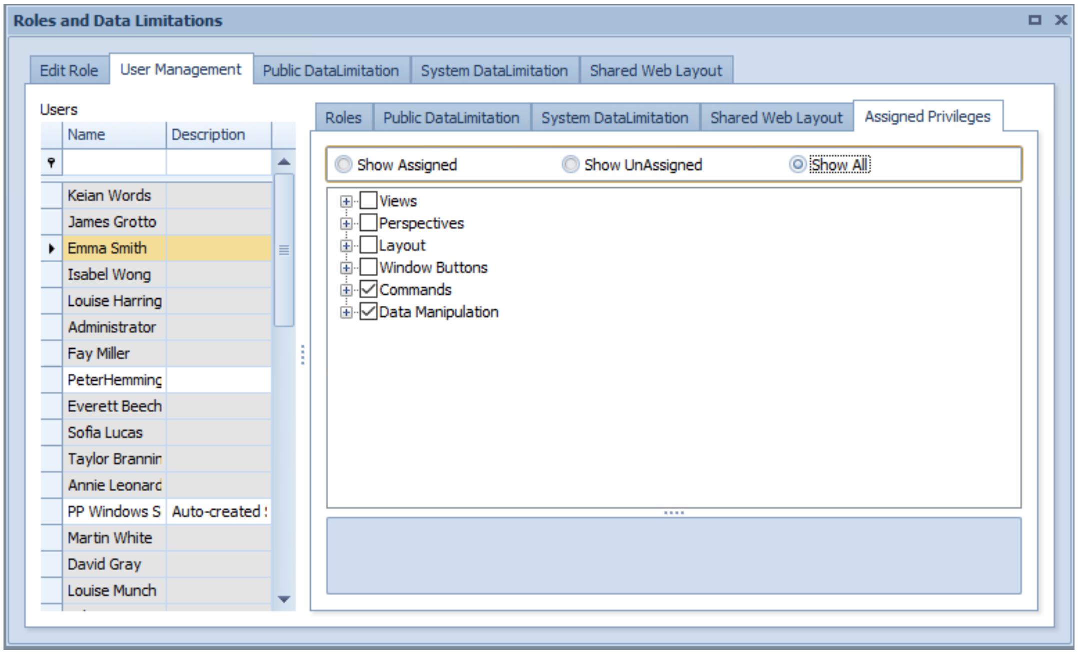
> **Note:** You can also do this via the User Management tab, instead

A user with several roles can have overlapping privileges. You can review each user's privileges in the User Management tab.

To view a user's total privileges:

1. Navigate to **Views » Security » Roles and Data Limitations**.
2. Click the **User Management** tab.

3. Click on the user in the Users list.
4. Click the **Assigned Privileges** tab in the right pane.
5. Select a privilege to display which roles are associated with it.



Note: Information in the Assigned Privileges tab is read-only.

View Data Limitations

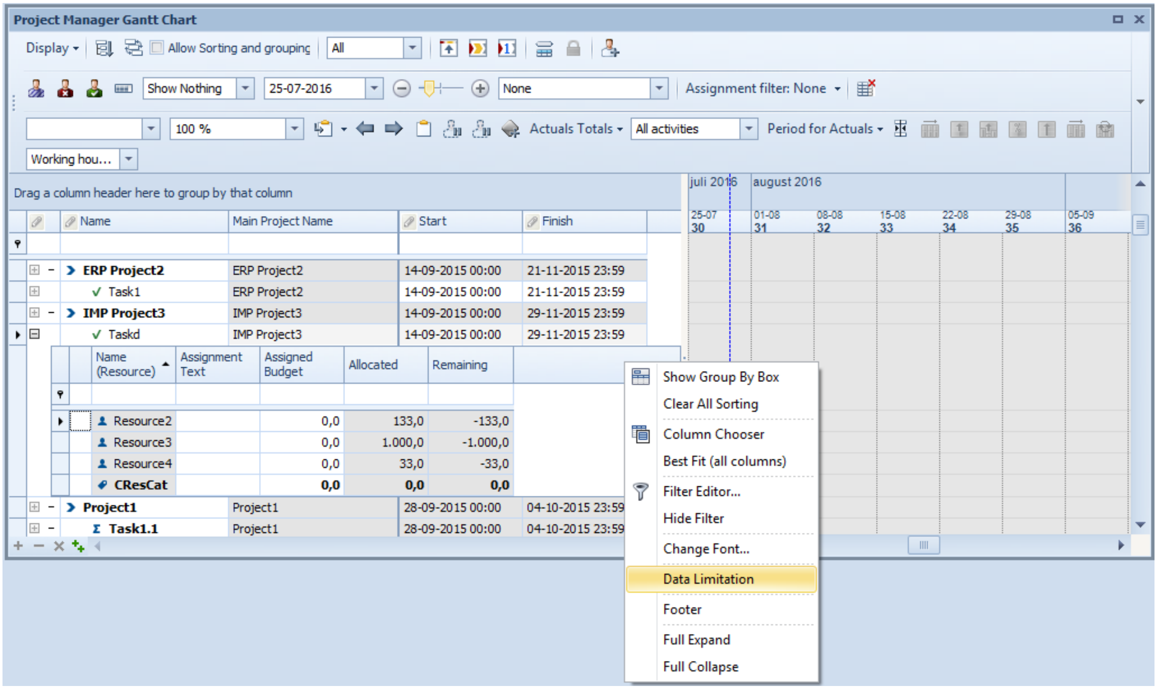
A data limitation is either global or acts on a specific view. A Global Data Limitation acts on all views that the user opens. The three types of data limitations that have been covered so far—User Data Limitations, Public Data Limitations, and System Data Limitations—are all global.

A **View Data Limitation** is one that is associated with a specific view. To tie a View Data Limitation to a specific view, you must:

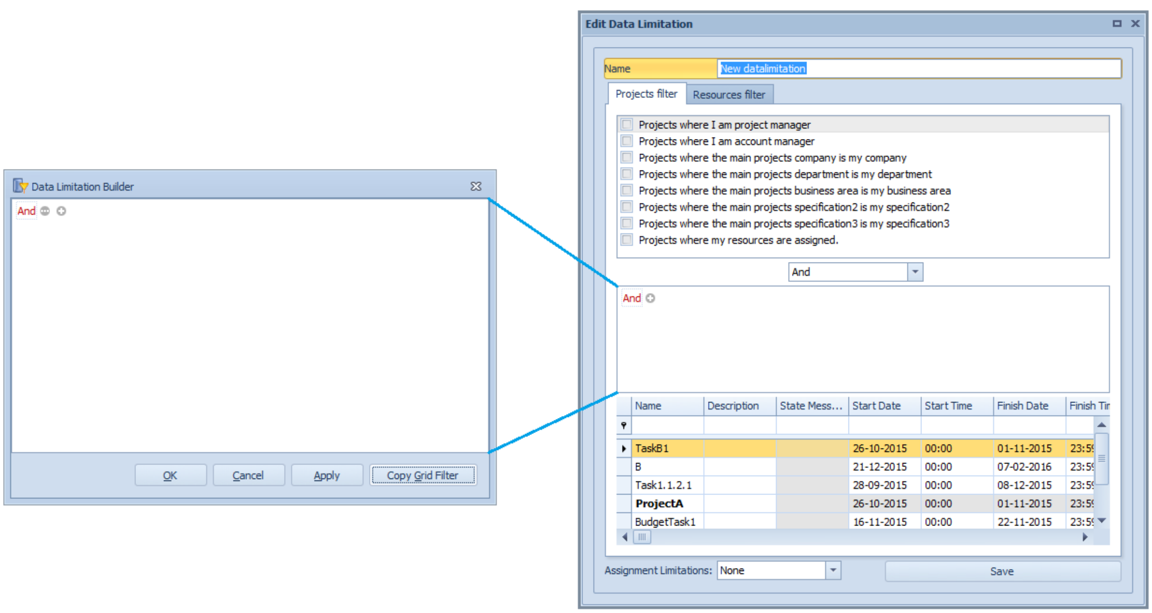
1. Open the view.
2. Add the data limitation to the main grid, or to the sub-grid in case of the PG or the RG.
3. Save the modified view as a perspective.

To add a data limitation to either the main grid or the assignment sub-grid:

1. Right-click on the header of the grid to open the shortcut menu.
2. Click the **Data Limitation** menu item.



The Data Limitation Builder window, used to define a View Data Limitation, looks different from the Edit Data Limitation dialog, which you use to define a Global Data Limitation. The Data Limitation Builder corresponds to the middle part of the more complex Edit Data Limitation dialog, as the following figure shows.



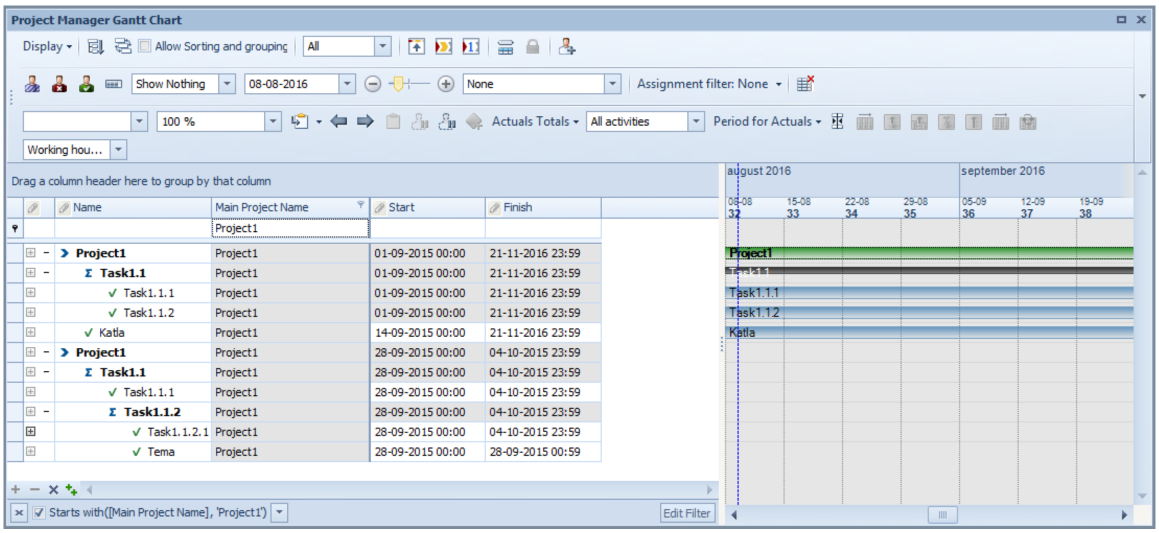
The Data Limitation Builder works in the same way as the generalized filters that are described in User Data Limitations. The main exception is that there is no preview sub-grid.

Create a View Data Limitation from a Grid Filter

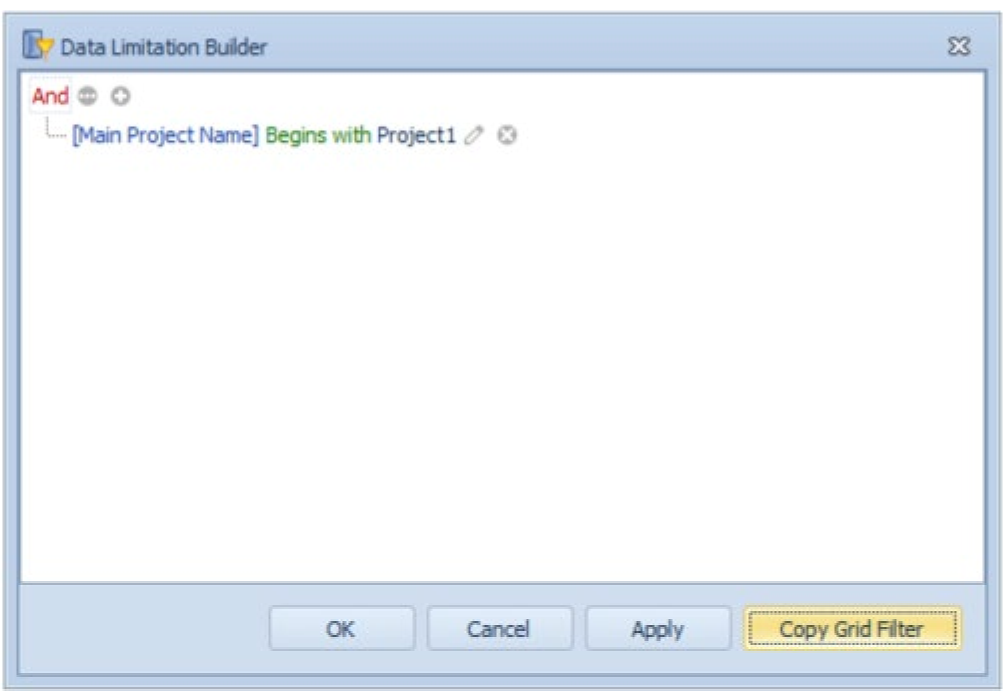
A shortcut to creating a View Data Limitation is to first create a Grid Filter, and then create the View Data Limitation from that filter.

To use a shortcut to create a View Data Limitation:

1. Open the view.
2. Define a Grid Filter.



3. Right-click on the header to open the shortcut menu.
4. Choose **Data Limitation** from the shortcut menu.
5. Click the **Copy Grid Filter** button.



Combining Data Limitations

When a user has more than one function in the company, this is usually reflected by the user being assigned to multiple roles in People Planner. Each role has its own set of privileges and its own set of associated data limitations. It is, therefore, relevant to discuss how data limitations are combined.

A Public Data Limitation is essentially the same as a User Data Limitation, the only difference being that the administrator, not the user, creates it. A user can have a maximum of one User or Public Data Limitation that is active at the same time. In contrast, you can have more than one System Data Limitation active through the roles that the user is assigned to.

This means that there are two possible types of basic combinations to consider:

- A System Data Limitation combined with another System Data Limitation
- A System Data Limitation combined with a User or Public Data Limitation

A System Data Limitation Combined with another System Data Limitation

Rule 1 — System Data Limitations are additive: If one of the System Data Limitations allows a user to see some specific data, that data should be visible, even if the other System Data Limitations do not allow that same user to see that data.

Were it not so, assigning more and more roles to a user would actually result in that user being able to do less and less work because less data would be visible with each new System Data Limitation (SysDL).

	SysDL1	SysDL2	SysDL1 + SysDL2
Allow a user to see some set of data	Yes	Yes	Yes
	Yes	No	Yes
	No	Yes	Yes
	No	No	No

A System Data Limitation Combined with a User or Public Data Limitation

Rule 2 — System Data Limitations overrule User or Public Data Limitations: A User or Public Data Limitation may never give a user rights to see data that a System Data Limitation prevents that user from seeing.

Rule 3 — Public or User Limitations are subtractive: If a User Data Limitation dictates that a user does not want to see some specific set of data, that data should not be visible, even if the System Data Limitation (SysDL) otherwise allows that user to see the data.

	SysDL	UserDL	SysDL + UserDL
Allow a user to see some set of data	Yes	Yes	Yes
	Yes	No	No
	No	Yes	No
	No	No	No

Multiple System Data Limitations Combined with a User Data Limitation

The three rules are trivially expanded to cover cases where there are several System Data Limitations, and they are combined with a single Public or User Data Limitation.

The following table shows the example of three System Data Limitations (SysDL) combined with a Public or User Data Limitation (UserDL). Green indicates where the additive-rule of the System Data Limitations dictates that the specific data should be visible in the Combined Data Limitation. Red indicates where the subtractive rule of Public or User Data Limitation overrules this, and dictates that the data should not be visible after all.

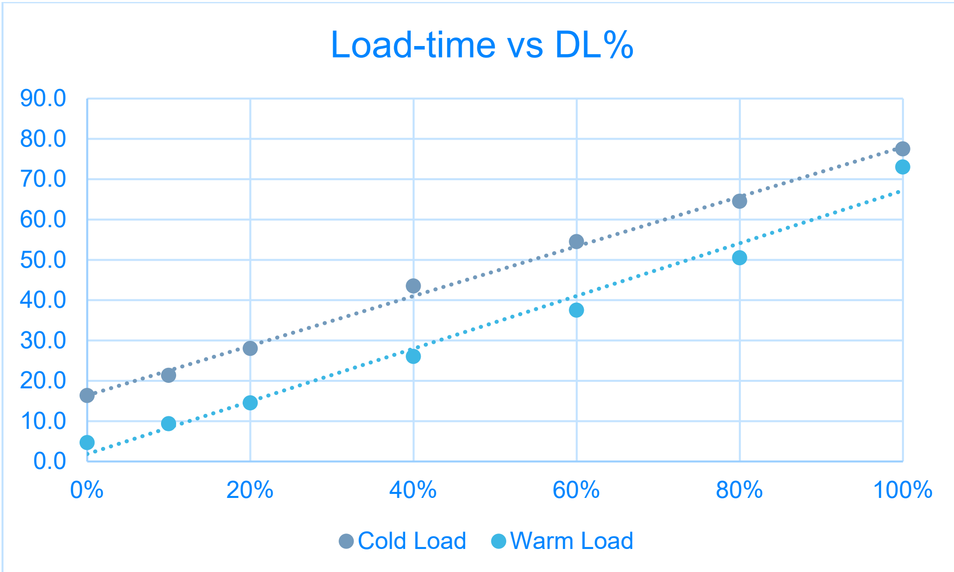
	SysDL1	SysDL2	SysDL3	UserDL1	Combined DL
Allow a user to see some set of data	Yes	Yes	Yes	Yes	Yes
	Yes	Yes	Yes	No	No
	Yes	Yes	No	Yes	Yes

	SysDL1	SysDL2	SysDL3	UserDL1	Combined DL
	Yes	Yes	No	No	No
	Yes	No	Yes	Yes	Yes
	Yes	No	Yes	No	No
	Yes	No	No	Yes	Yes
	Yes	No	No	No	No
	No	Yes	Yes	Yes	Yes
	No	Yes	Yes	No	No
	No	Yes	No	Yes	Yes
	No	Yes	No	No	No
	No	No	Yes	Yes	Yes
	No	No	Yes	No	No
	No	No	No	Yes	No
	No	No	No	No	No

Data Limitations and Performance

One of the uses for a data limitation is to improve People Planner's performance.

It turns out that the effectiveness of a data limitation is directly inversely proportional to how much data it lets through. The following graph is from a case study that was performed with a very large database.



The scenario consisted of opening a perspective with a combined PG and RG and measuring how long this took. The numbers on the y-axis are the load times of the perspective in seconds.

These measurements were then repeated with different data limitations active. The numbers along the x-axis indicate how much data the active data limitation was letting through: 0% meaning that the data limitation was not letting any data through, and 100% meaning that the data limitation let all of the data through.

The two graphs clearly show that there was a linear relationship between how long it took to load the perspective and how much data the data limitation would let through. This relationship is indicated with the dotted trend lines.

The two graphs, Cold Load and Warm Load, refer to the cases where the People Planner application was just started or had been used for a while:

- **Cold Load** — People Planner has just been started. No data is cached yet, either in the memory or in the SQL Server.
- **Warm Load** — People Planner is now running, and the application has had time to cache the current working data in both the memory and in the SQL Server.

The graph for the Cold Load shows that the load time is not zero even if the data limitation hides all of the data. This is because there is always an overhead to starting up.

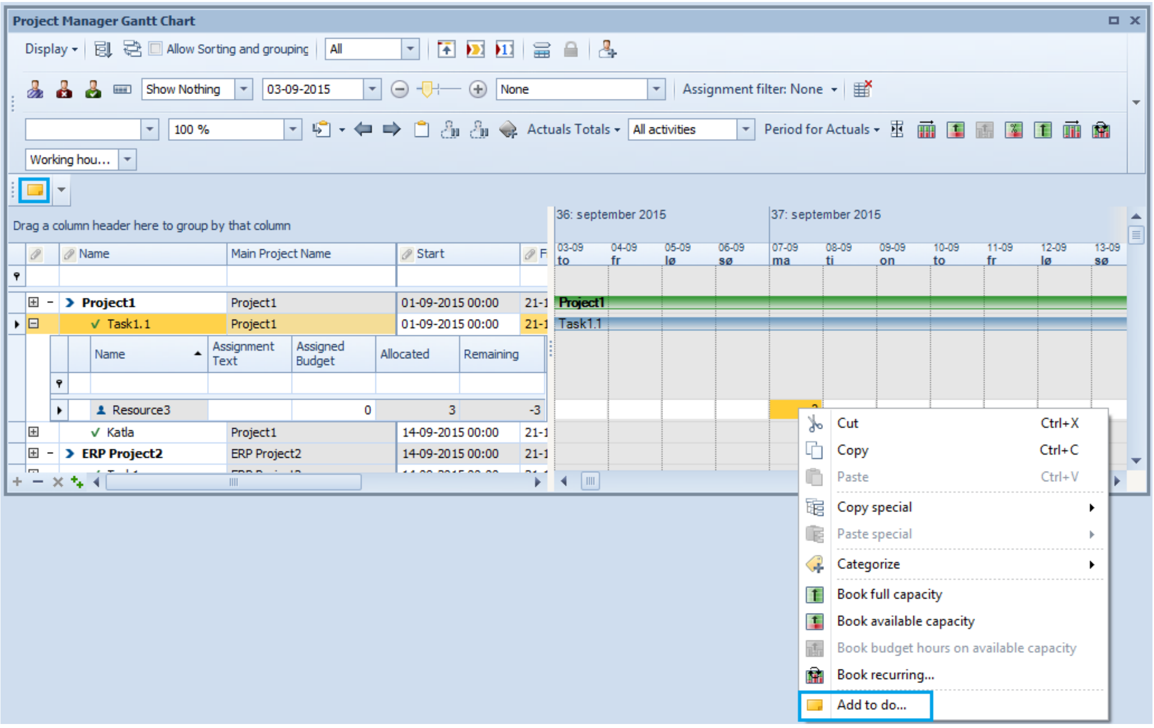
Given the linear nature of the graphs, this suggests a way to estimate how much data a data limitation must filter away to keep the load time below a specified threshold. You can simply measure how much time it takes to load the perspective with a data limitation that lets 0% through and with a data limitation that lets 100% through. Plot the two data points at 0% and 100% respectively, and draw a straight line between them. Use this line to estimate how much data the data limitation should hide for an acceptable load time.

To-Do's

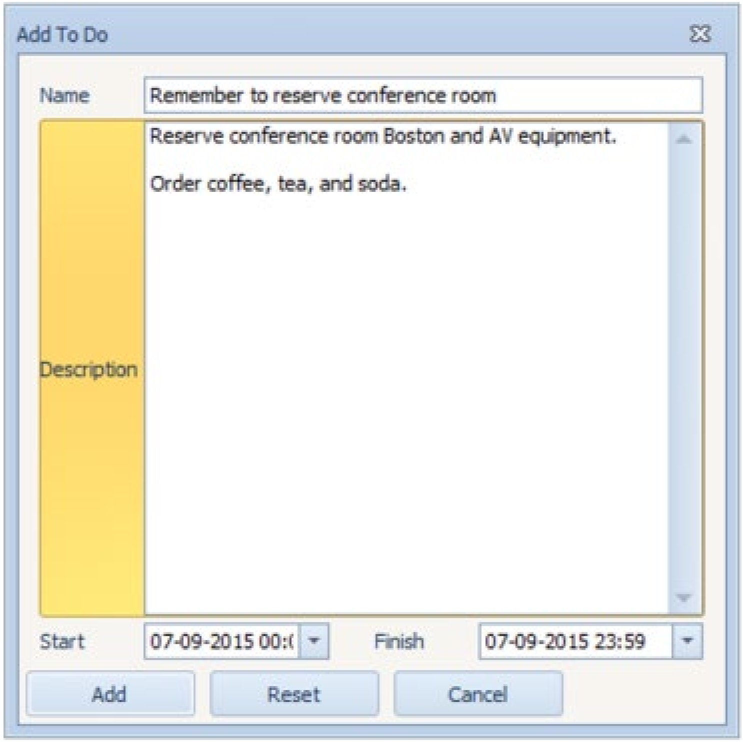
A To-Do can be compared to a small comment on an allocation.

The Add To-Do… functionality is available:

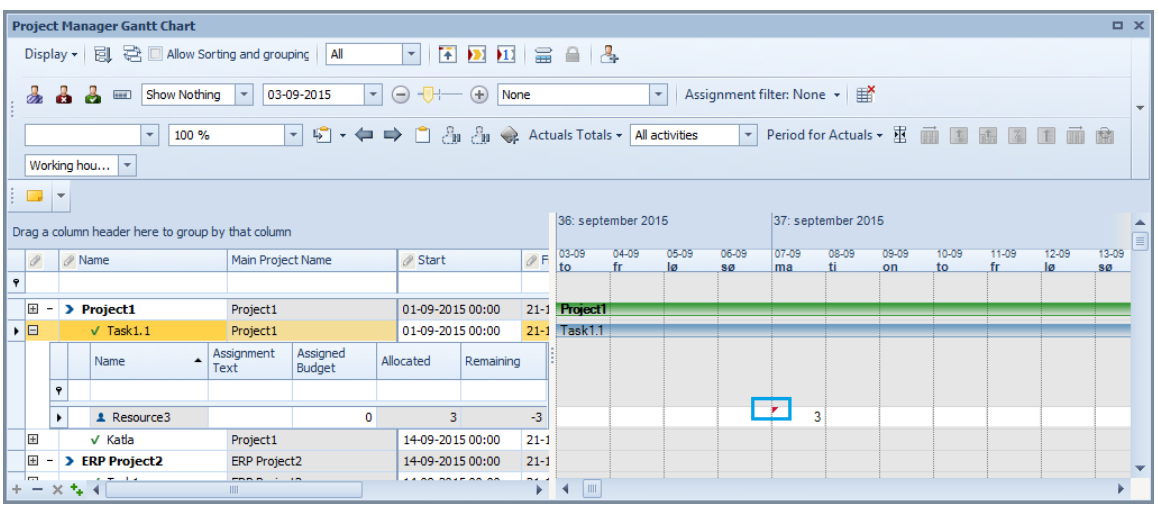
- As a control that you can add to the PG or RG.
- In the shortcut menu that opens when you right-click on a booking.



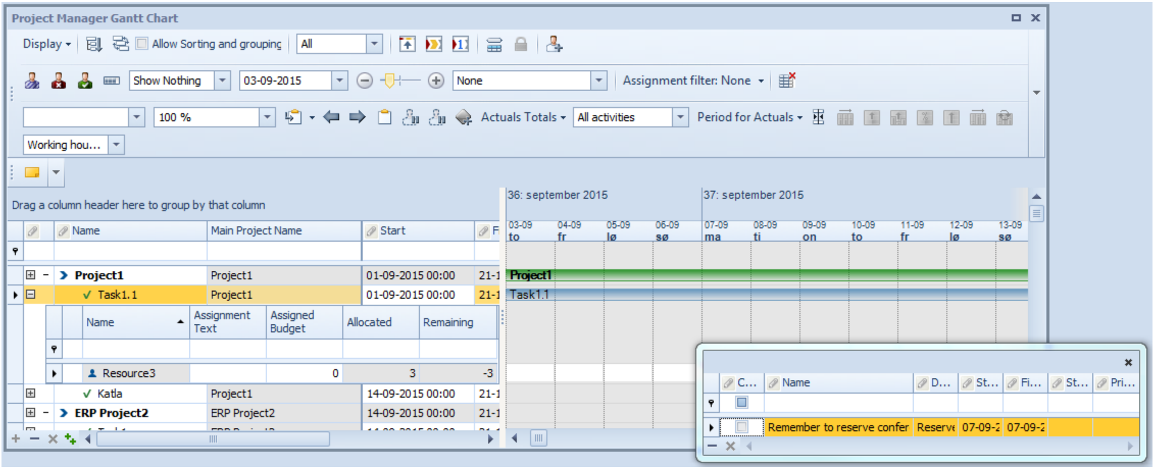
This functionality is only enabled when you have selected a booking; that is, you cannot create a to-do on an empty cell. The to-do is deleted if the booking is deleted. When you choose Add to do… from the right-click menu, the Add To Do dialog enables you to create a to-do. The following figure shows an example.



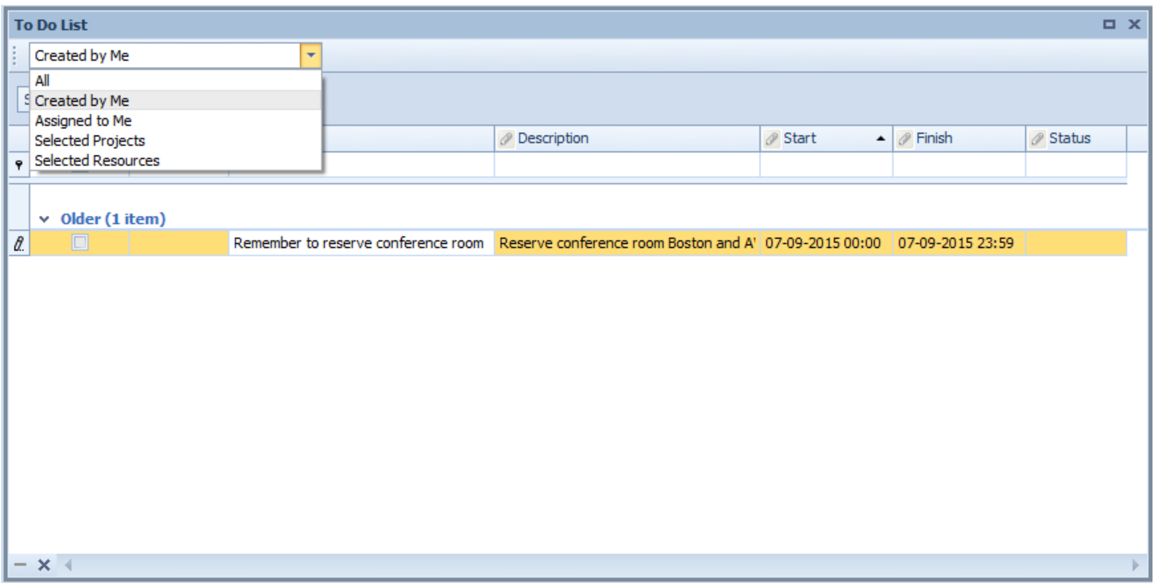
When a to-do has been created, it appears as a small red triangle in the upper-left corner of the booking, as highlighted by the blue box in the following figure.



Hovering the mouse over the to-do opens a small window that displays the details of the to-do, as the following example shows.



In addition to being displayed in the PG or RG, the to-do is also accessible via the To-Do List view, as the following example shows. You access this view via **Views » Projects » To Do » To Do List**.

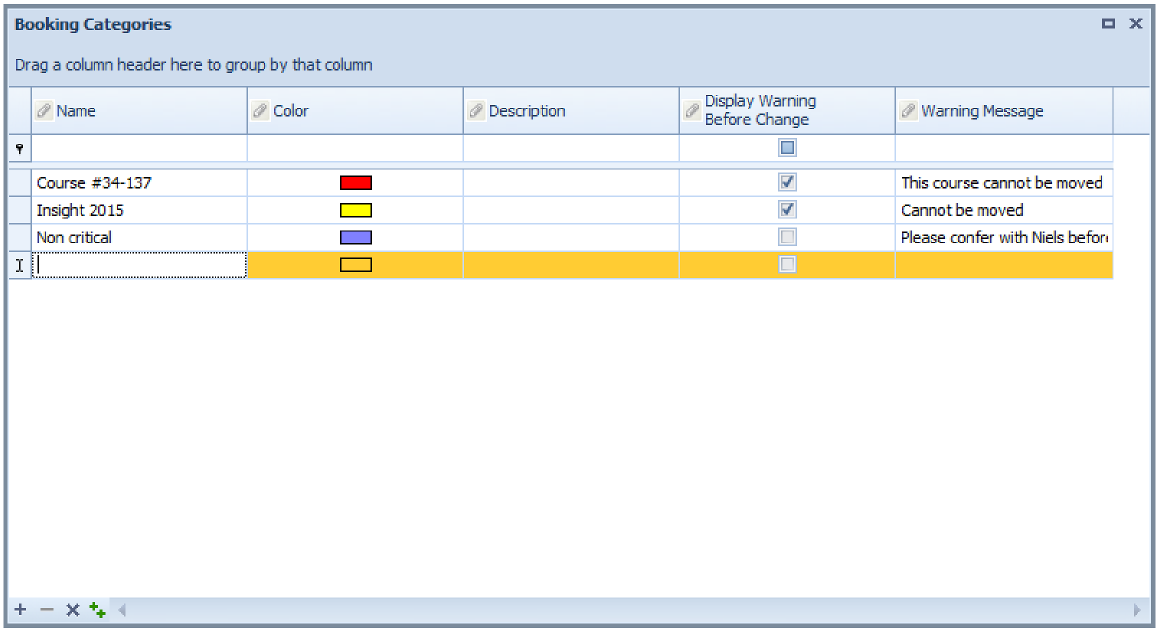


Booking Categories

Booking categories are intended to protect a booking against being changed by someone else.

The booking category does not actively prevent anyone from changing a booking, but it can be configured to issue a warning if someone attempts to do so.

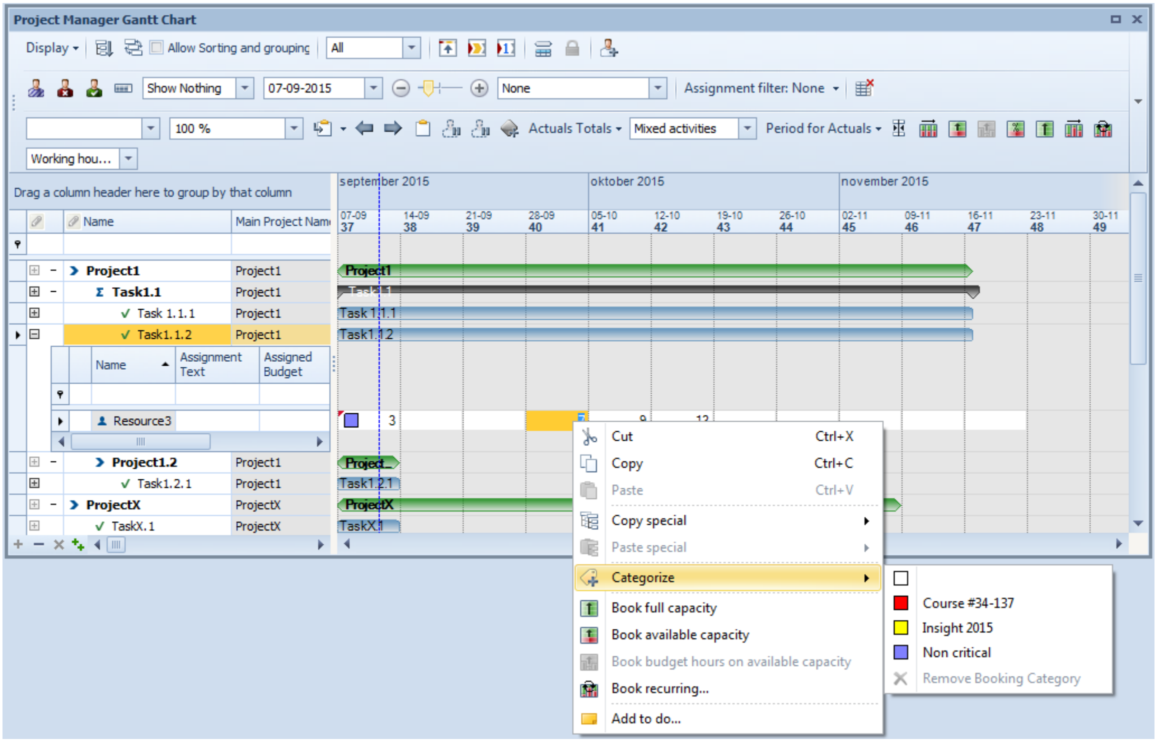
To create a booking category, go to **Views » General » Booking Categories**. The following figure shows an example.



To assign a booking category to a booking:

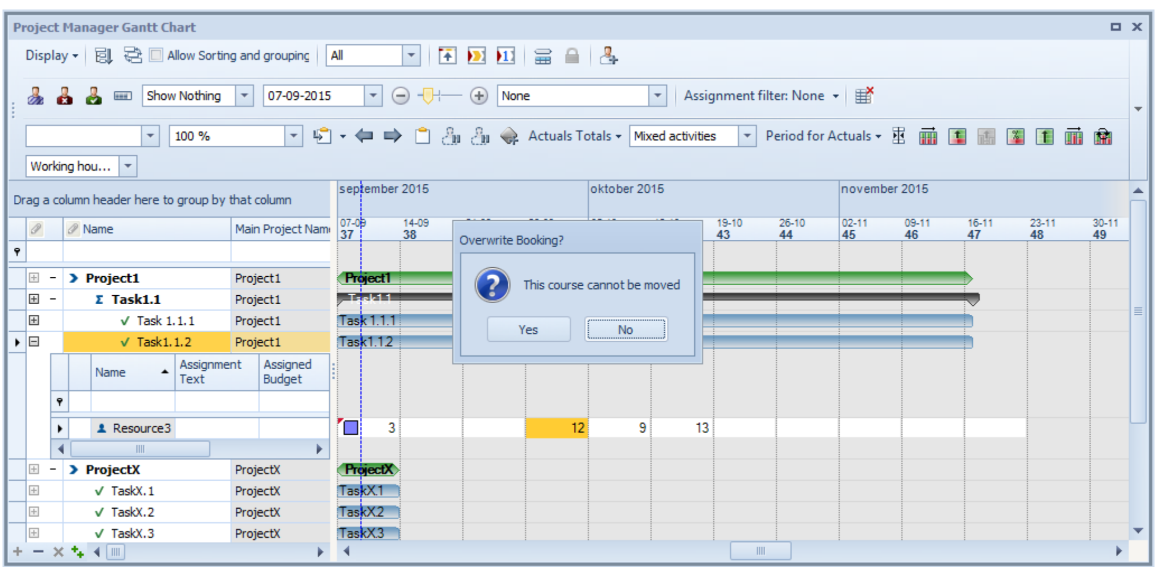
1. Right-click on the booking or bookings to access the shortcut menu, which includes the Categorize option.
2. Select the booking category from the **Categorize** menu option on the shortcut menu.

   The following figure shows an example of assigning a booking category via the Categorize menu.



A booking category appears as a small colored square to the left of the booking. Hovering the mouse over the square displays the description part of the booking category.

When someone tries to change the booking, a warning message is displayed. This also includes attempts to delete or move the booking. The following example shows an attempt to change the value of a booking that has a booking category.



Users can choose to respect the warning or to force the change, preferably after having consulted with the owner of the booking.

Copy and Move Information

People Planner supports various types of copying and pasting.

Drag and Drop Gantt Bars

You can move an entire project by using the mouse to drag and drop the Gantt bar of the project. This moves the project as a whole, including all child events, assignments, and allocations.

You can also drag individual Gantt bars of events in the project. This moves the event as a whole, including any child events, assignments, and allocations. It might also result in the parent event being resized to be consistent with the new start and finish dates of its children.

Cut/Copy and Paste Allocations

> **Tip:** Remember that the terms *allocation* and *booking* refer to the same thing: when a resource has been assigned to work on an event for a specified number of hours.

You can copy or move bookings using the keyboard, mouse, or shortcut menu:

Keyboard

To copy or move a booking using the keyboard:

1. Focus on the booking.
2. Press **Ctrl+C** to copy or **Ctrl+X** to cut the booking.
3. Focus on the new cell.
4. Press **Ctrl+V** to insert the booking in the new cell.

Mouse

To copy or move a booking using the mouse:

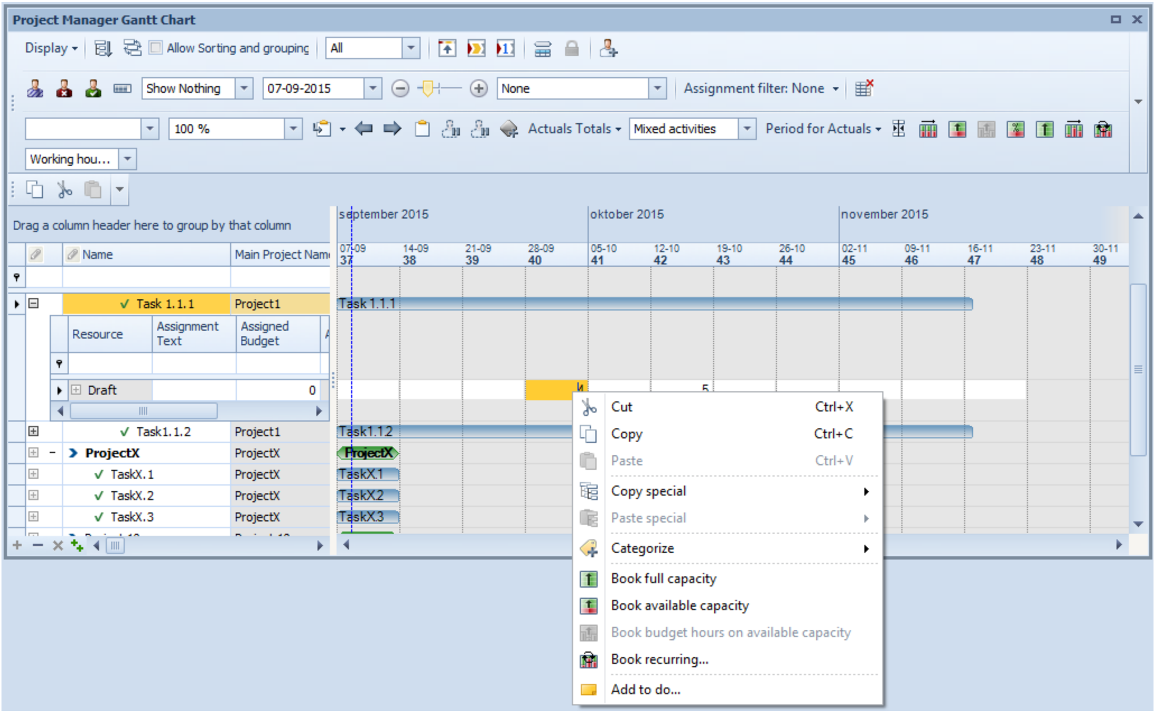
1. Click on the booking.
2. Do **one** of the following:
   - Drag the booking to the new cell to move the booking.
   - Press **Ctrl** while dragging the booking to copy the booking.

Shortcut Menu

To copy or move a booking using the shortcut menu:

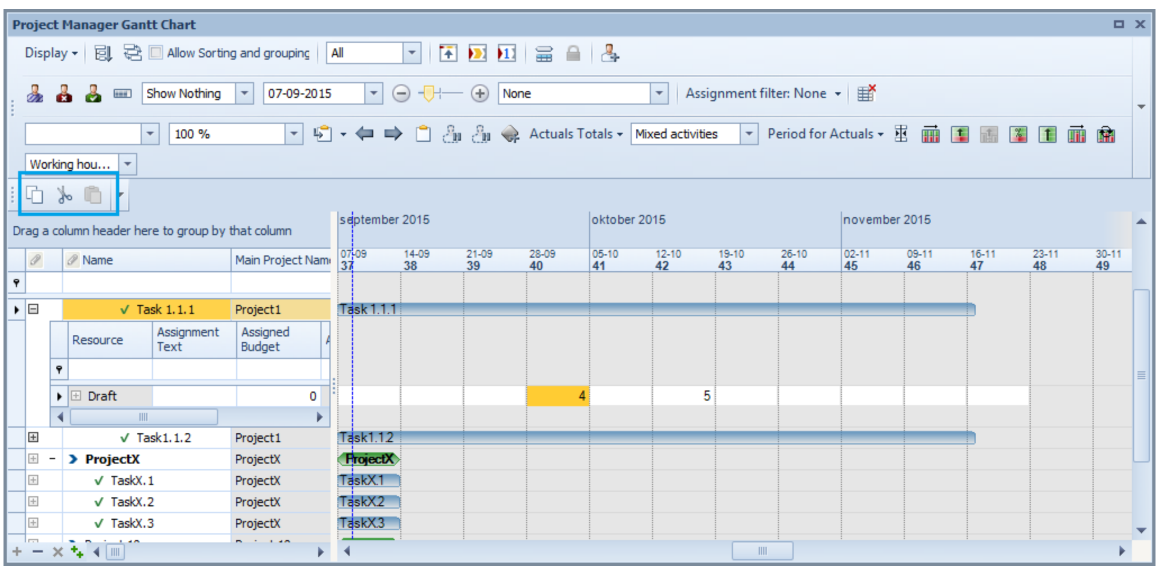
1. Right-click on the booking to open the shortcut menu.
2. Choose **Copy** or **Cut** from the shortcut menu, as appropriate to what you need to do.
3. Right-click in the new cell to open the shortcut menu.
4. Choose **Paste** from the shortcut menu.

The following figure shows the shortcut menu for a cell.



Tip: You can also do copy/cut and paste using the **Copy**, **Cut**, and **Paste** buttons, which you can add to the PG and the RG.

The following figure shows the **Copy**, **Cut**, and **Paste** buttons, respectively.



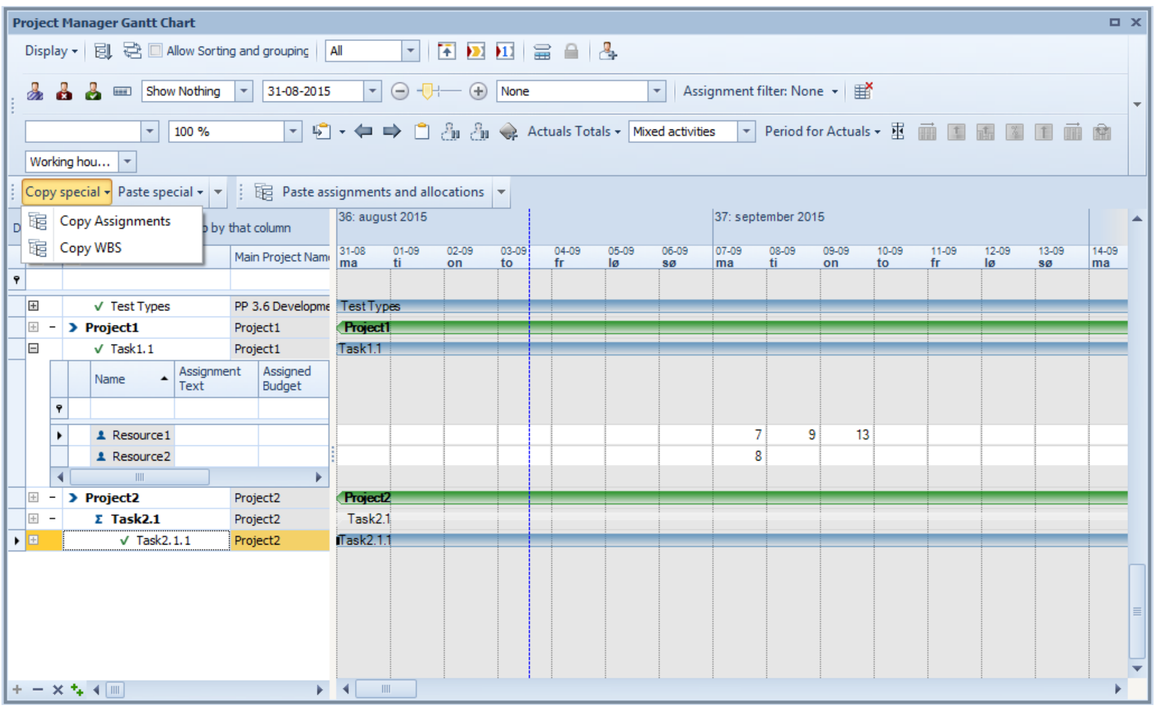
Copy Assignments and Allocations

You can copy assignments and allocations from one event to another.

To do this, you must do **one** of the following:

- Add the two multipurpose **Copy Special** and **Paste Special** controls to the PG.
- Add the single-purpose **Copy Assignments** and **Paste assignments and allocations** controls to the PG.
- Right-click the Gantt bar to open the shortcut menu and select the Copy and Paste menus from there.

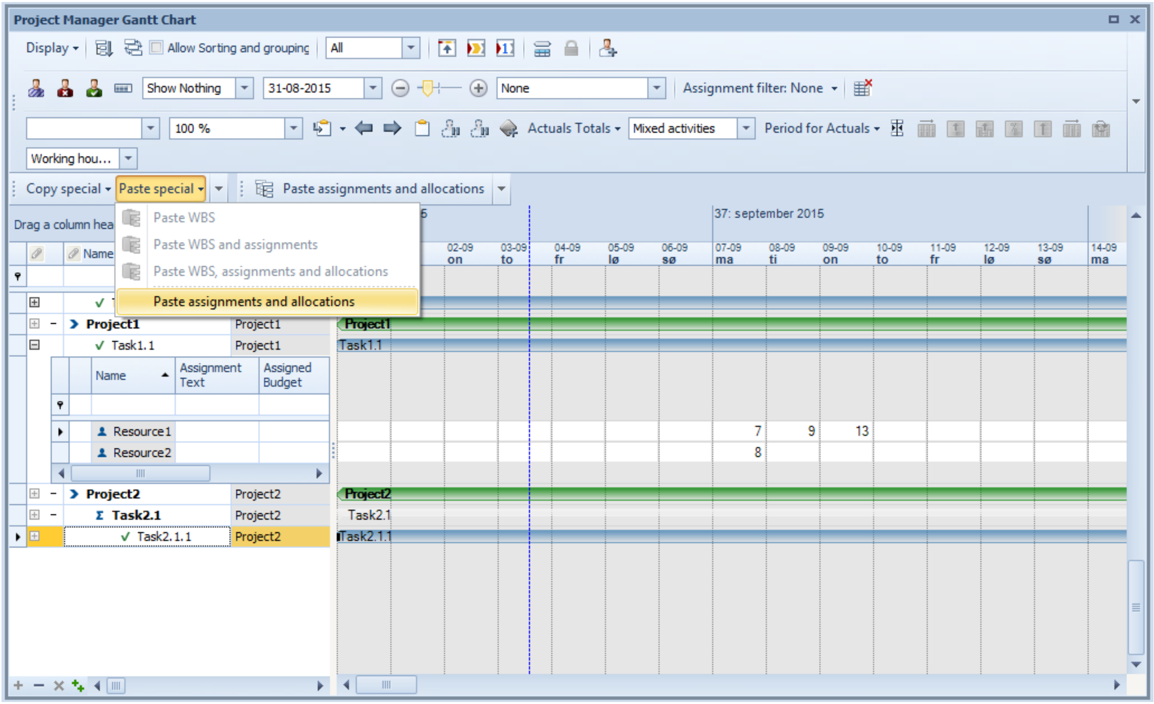
In the following example, the copy and paste controls have been added to the PG.



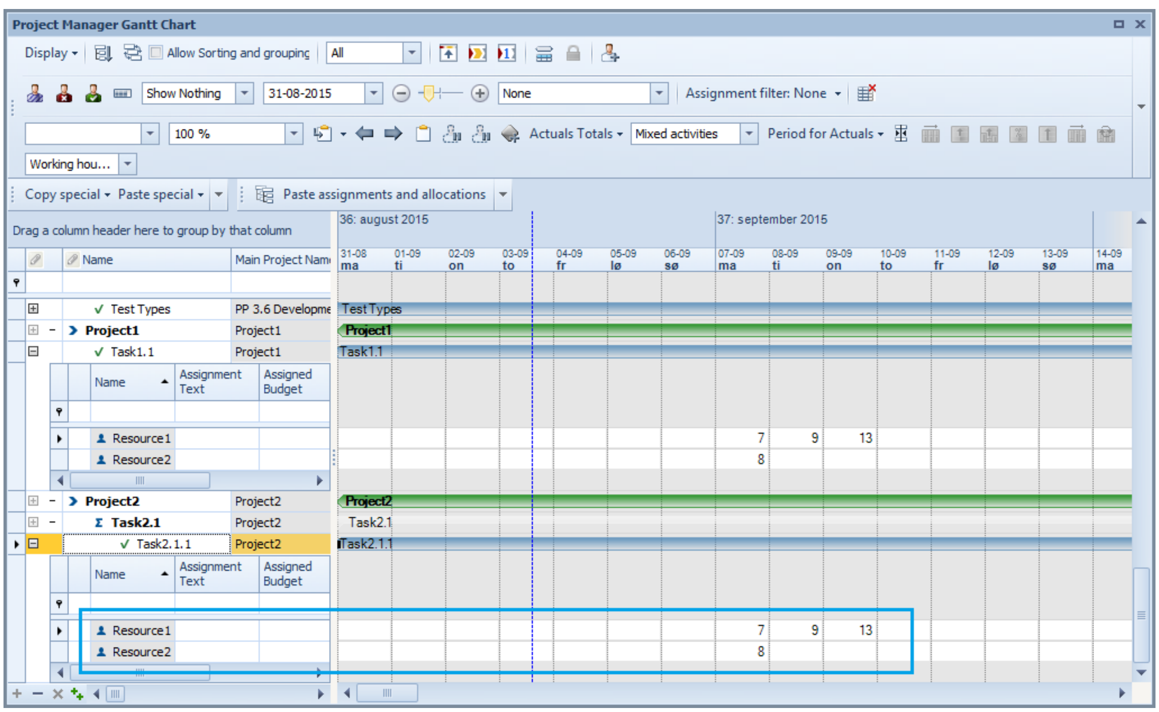
To copy the assignments from one event to another:

1. Highlight the source event.
2. Click **Copy Assignments**.
3. Highlight the target event.
4. Click **Paste Assignments and Allocations**.

The paste menu, shown in the following figure, is only enabled when you have first used the copy menu to select something.



The following example shows the assignments and allocations copied from Task 1.1 to Task 2.1.1.

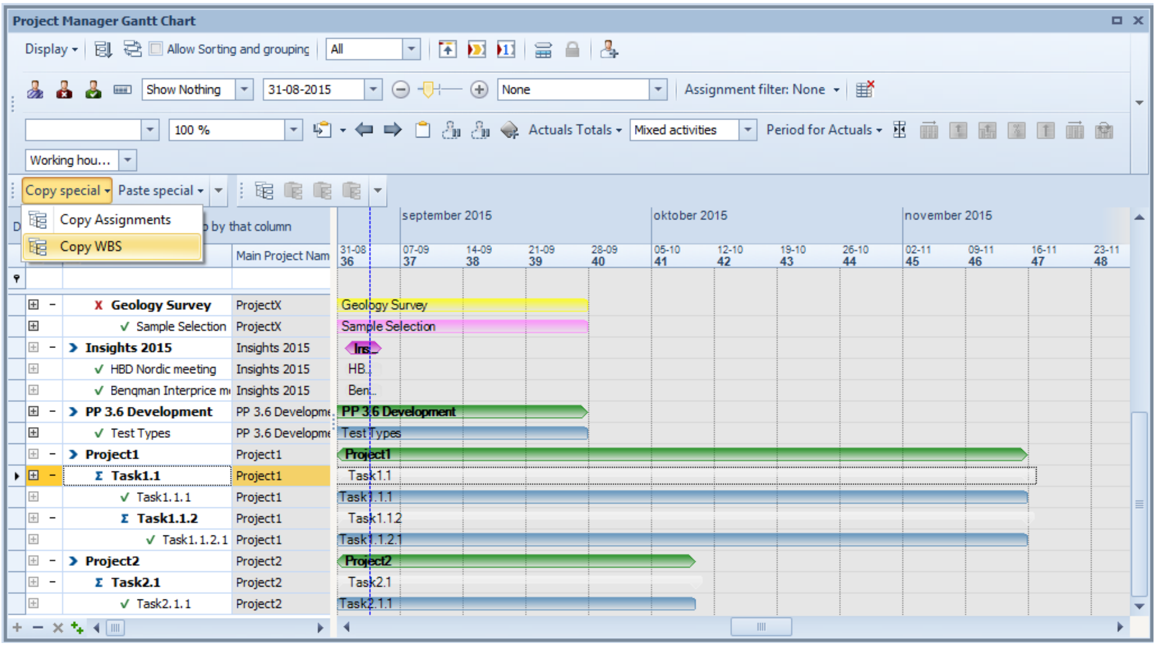


Copy WBS, Assignments, and Allocations

You can copy a WBS from one event to another. To do this, you must do **one** of the following:

- Add the two multipurpose **Copy Special** and **Paste Special** controls to the PG.
- Add the single-purpose **Copy WBS**, **Paste WBS**, **Paste WBS and assignments** control and the **Paste WBS, assignments, and allocations** control to the PG.
- Right-click the Gantt bar to open the shortcut menu, and select the Copy and Paste menus from there.

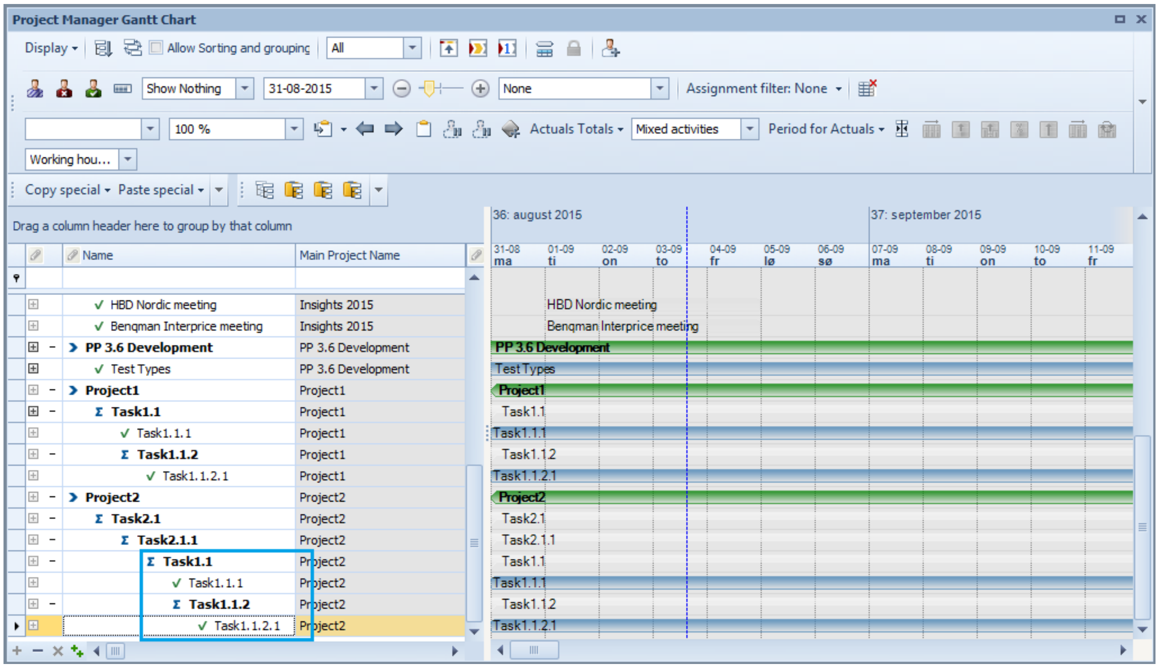
The following example shows the copy and paste controls added to the PG.



To copy the WBS from one event to another:

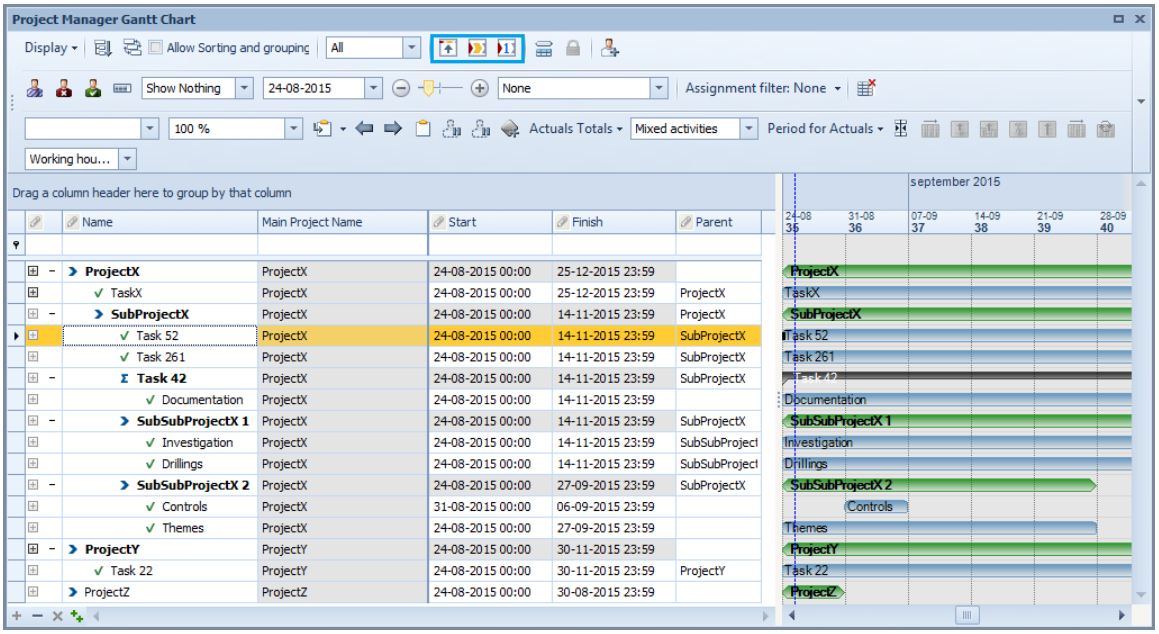
1. Highlight the source event.
2. Click **Copy WBS**.
3. Highlight the target event.
4. Click **Paste WBS**, **Paste WBS and Assignments** or **Paste WBS, Assignments, and Allocations**, depending on how much detail you want to copy.

The following example shows the WBS of Task 1.1 (under Project1) copied to Task2.1.1.


Project Manager Gantt Chart
Display
Allow Sorting and grouping
All
Show Nothing
31-08-2015
None
Assignment filter: None
100 %
Actuals Totals
Mixed activities
Period for Actuals
Working hou...
Copy special
Paste special
Drag a column header here to group by that column
Name
Main Project Name
36: august 2015
37: september 2015
HBD Nordic meeting
Insights 2015
Benqman Interprice meeting
Insights 2015
PP 3.6 Development
PP 3.6 Development
Test Types
PP 3.6 Development
Project1
Project1
Task1.1
Project1
Task1.1.1
Project1
Task1.1.2
Project1
Task1.1.2.1
Project1
Project2
Project2
Task2.1
Project2
Task2.1.1
Project2
Task1.1
Project2
Task1.1.1
Project2
Task1.1.2
Project2
Task1.1.2.1
Project2

Project Filters

When there are many projects in People Planner, you might need to apply filters to determine which projects you see.



The three project filter buttons enable you to do this:

- **Display Main Project and its Subprojects**.
- **Display Selected Project Including Subprojects**.
- **Display Selected Project Excluding Subprojects**.

These three buttons are mutually exclusive, and they are ordered according to how much they filter out.

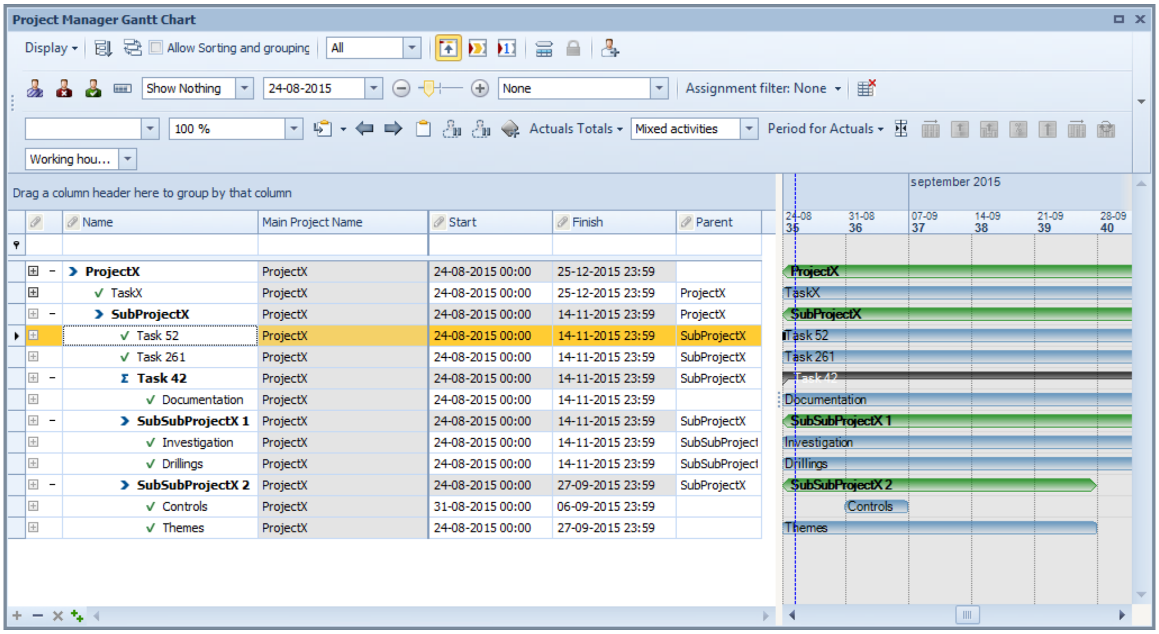
To use a project filter button:

1. Open the PG.
2. Select an event.
3. Click the appropriate filter button.

For another type of project filter, see View Only Projects Related to Selected Assignments.

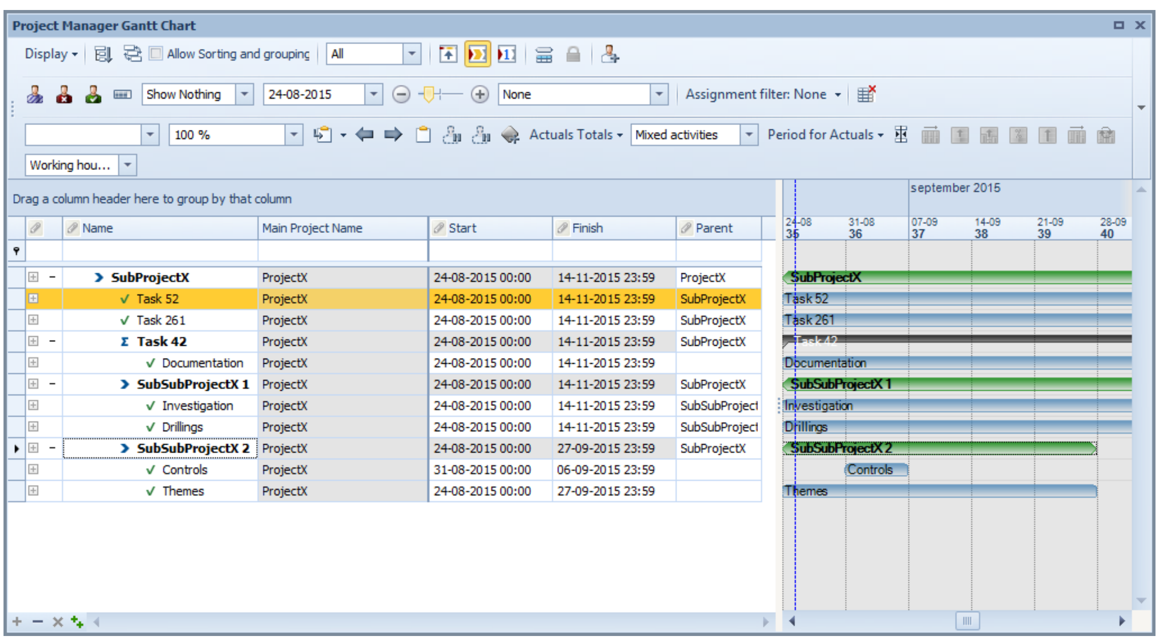
Display Main Project and its Subprojects

This filter shows the project, including the main project and any subprojects of the selected project. All other projects are filtered out.



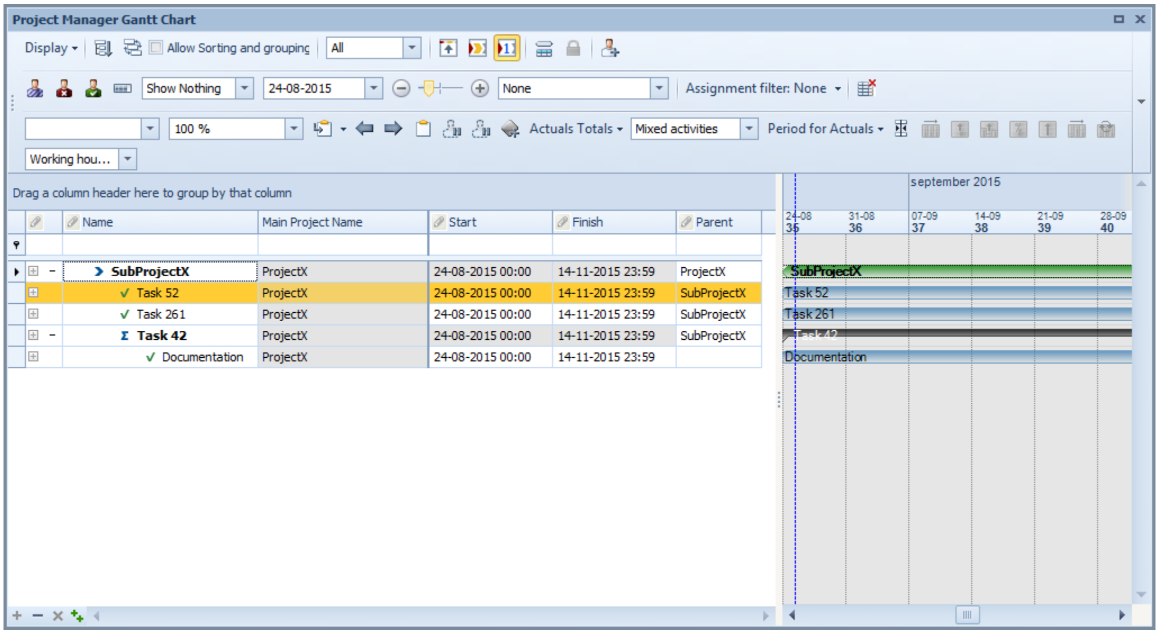
Display Selected Project including Subprojects

This filter shows the project, and any subprojects, of the selected event. It does not show any parent projects. All other projects are filtered out.



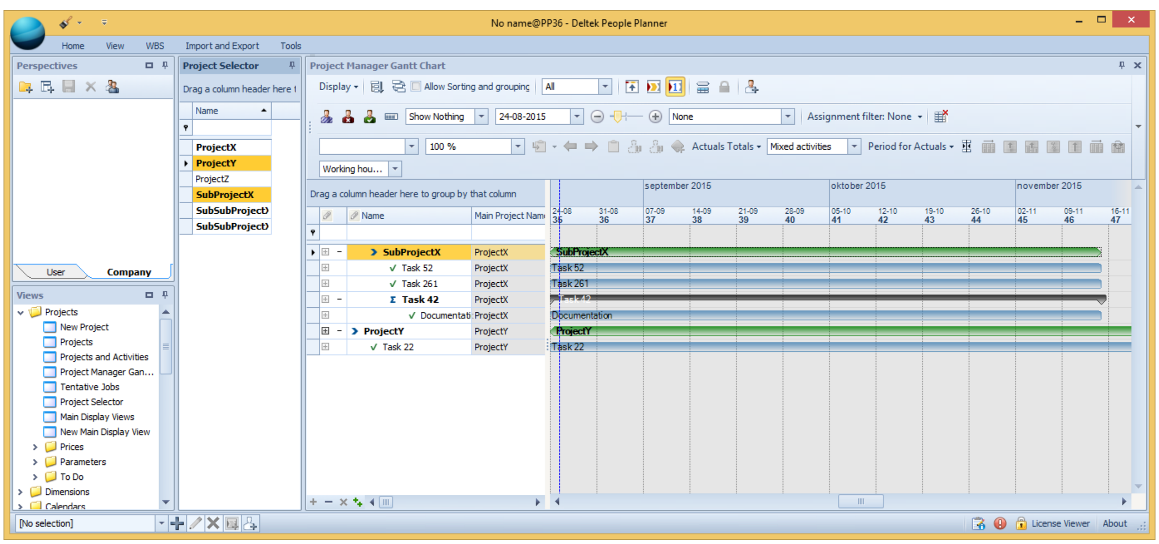
Display Selected Project excluding Subprojects

This filter shows the project of the event. It does not show any parent projects, nor does it show any subprojects. All other projects are filtered out.



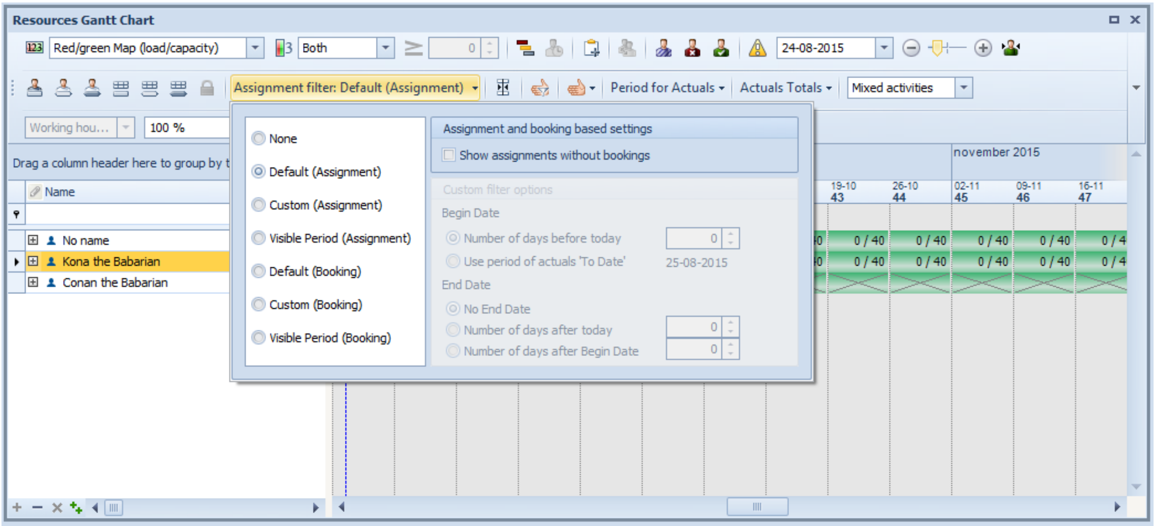
Project Selector

When the PG is combined with the Project Selector view, the project filters can act on more than one project. Thus in this case the selected project refers to those that are selected in the Project Selector and not the PG.



Assignment Filters

Resources are assigned to more and more events as time goes on. The assignment filters filter out those assignments that are no longer relevant—for example, because the project has long since been finished.



These filters can work three basic ways:

- No filtering
- Filter on assignments
- Filter on bookings

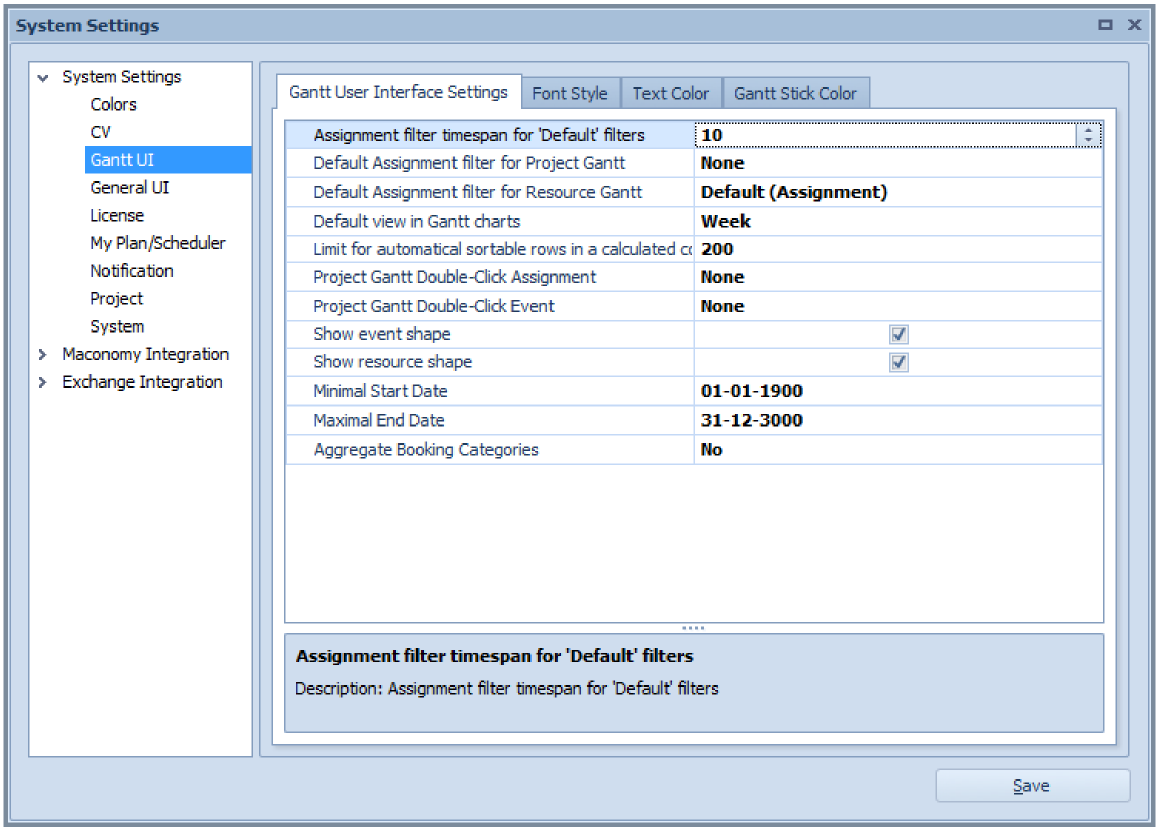
Filtering Period

Each filter has three variations, each of which controls the time span that the filter uses:

- Default
- Custom
- Visible Period

Default Time Span

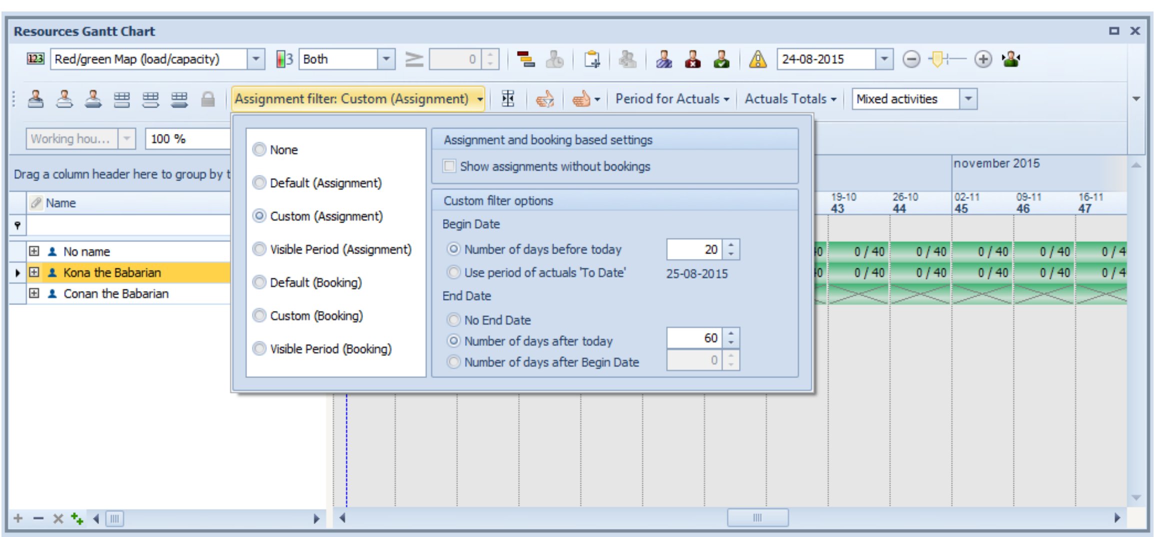
This time span is determined by your System Settings (**Views » System » System Settings**).



In this case, the time span is from 10 days before today's date to 10 days after today's date.

Custom Time Span

You specify this time span when you run the filter.



In this example, the time span is 20 days before today's date to 60 days after today's date.

Another option is for the time span to begin when the Period for Actuals time span ends. The Period for Actuals time span is used to indicate where the planning has been overtaken by time—that is, where it is more accurate to look at actual hours from time registrations instead of planned hours. See Set the Period for Actuals. This means that this variation of the assignment filter starts its time span where the planning begins.

The end date of the time span can either be open-ended, or you can set it to a specified number of days after today's date, or you can set it to a specified number of days after the start of the time span.

Visible Period Time Span

This time span is simply what is currently visible in the PG or RG. When you scroll the visible period, the assignment filter follows.

Filter on Assignments

To determine which assignments to show and which to hide, this filter looks only at the assignments themselves. For the purposes of this filter, it does not matter whether there are any bookings on the assignments.

Filter on Bookings

To determine which assignments to show and which to hide, this filter looks at the bookings on the assignments.

This filter shows exactly those assignments that have bookings in the time span that you specified (Default, Custom, or Visible Period).

Some customers might have assignments that in effect never end; for example, they have set the end date to the year 3000. In this case, the Filter on Bookings filter helps you to see only those assignments that are currently active in the sense that they have planning (bookings) in the relevant time span.

To contrast with the Filter on Assignments filter: Because the existence of bookings implies that the assignment must overlap fully or partially with the time span, this means that all of the assignments are included in the Filter on Assignments filter. That is, the Filter on Bookings filter is more restrictive.

Show Assignments without Bookings

When an event is created, there are no bookings on it. Because of this, the assignment may be filtered out, leaving you to wonder if the event was created at all.

The **Show Assignments without Bookings** check box is intended for use in exactly this scenario. When it is selected, all assignments that do not have any bookings at all are shown. This prevents new events from being filtered out.

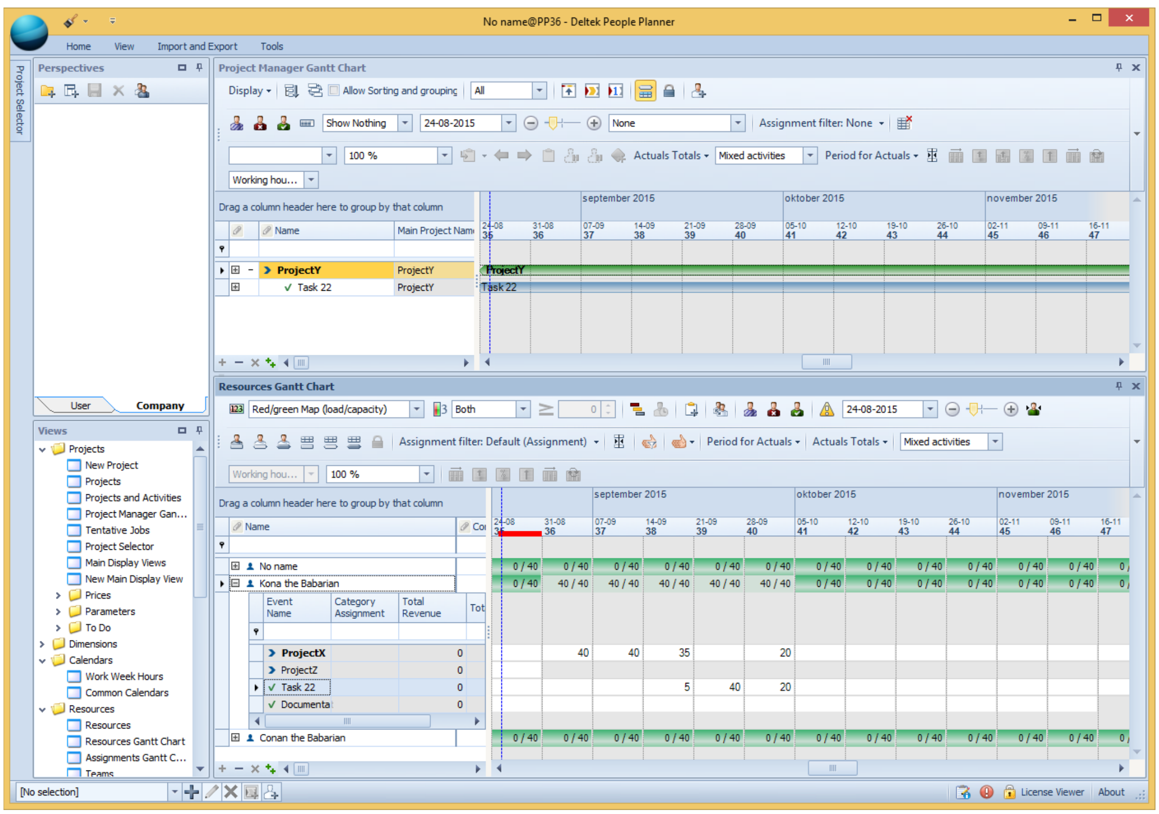
Filter Based on What is Selected

When a PG and RG are combined in a perspective, selecting something in one Gantt chart can be used for filtering in the other.

- In the PG, you can filter the displayed project according to which assignments are currently selected in the RG.
- In the RG, you can filter the displayed resources according to which events are currently selected in the PG.
- In the RG, you can filter the displayed assignments according to which events are currently selected in the PG.

View Only Projects Related to Selected Assignments

Click **View Only Projects Related to Selected Assignments** to filter the projects that are currently shown in the PG, depending on what assignments are selected. This requires that the PG be combined with a view that shows assignments. Most often, this is the RG.



To view only projects related to selected assignments:

1. Open the PG and the RG.
2. In the PG, click the **View Only Projects Related to Selected Assignments** button.
3. In the RG, select an assignment.

Lock View (PG)

When you have found the appropriate project and it is currently shown in the PG, you can lock the PG by clicking the **Lock View** button.

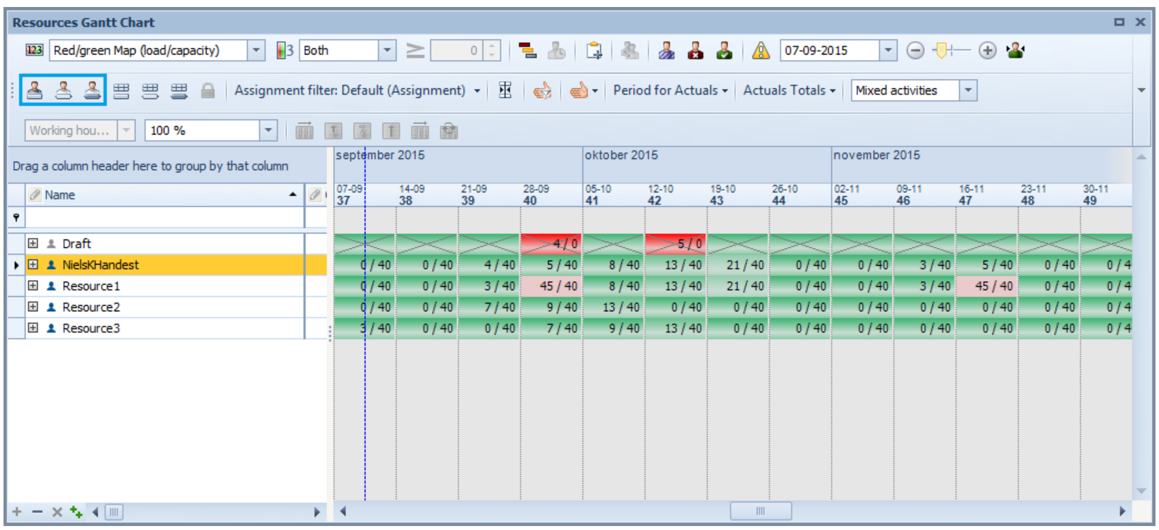
You can then work in the RG by, for example, selecting other assignments, without having to fear that the PG is then updated to show a different project.

View Only Resources Assigned to Selected ...

The RG has a group of three buttons that filter which resources are shown, depending on what events are selected in the PG:

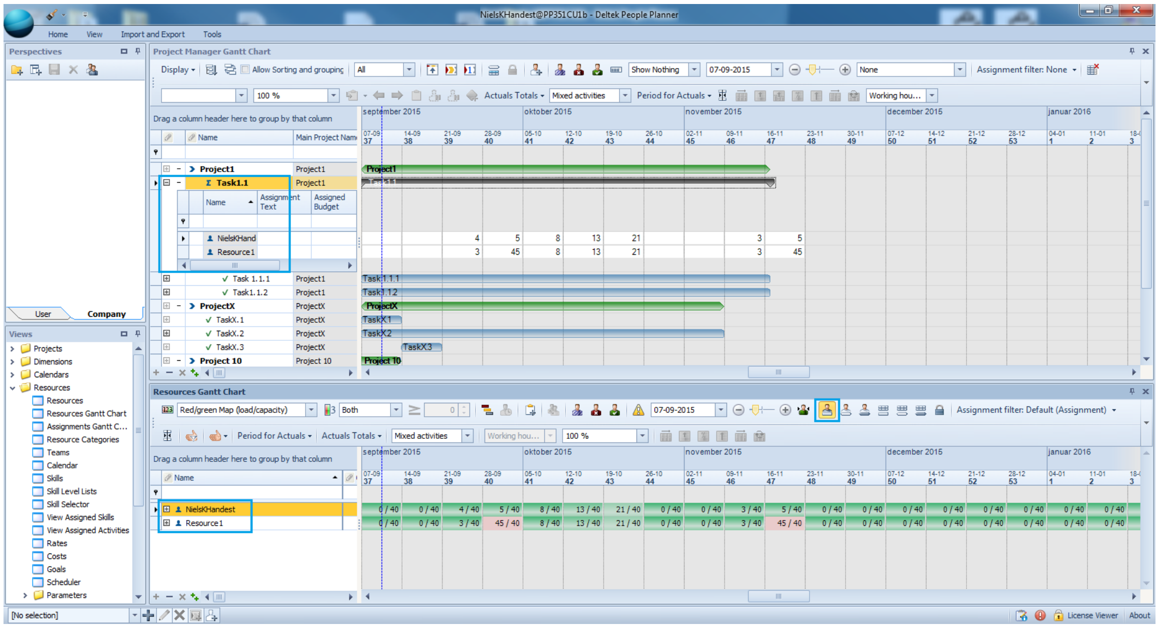
- **View Only Resources Assigned to Selected Events**
- **View Only Resources Assigned to Selected Projects**
- **View Only Resources Assigned to Selected Projects and Subprojects**

These three buttons are mutually exclusive; only one of them can be selected at a time. The following figure shows these three buttons, highlighted by the blue box.



View Only Resources Assigned to Selected Events

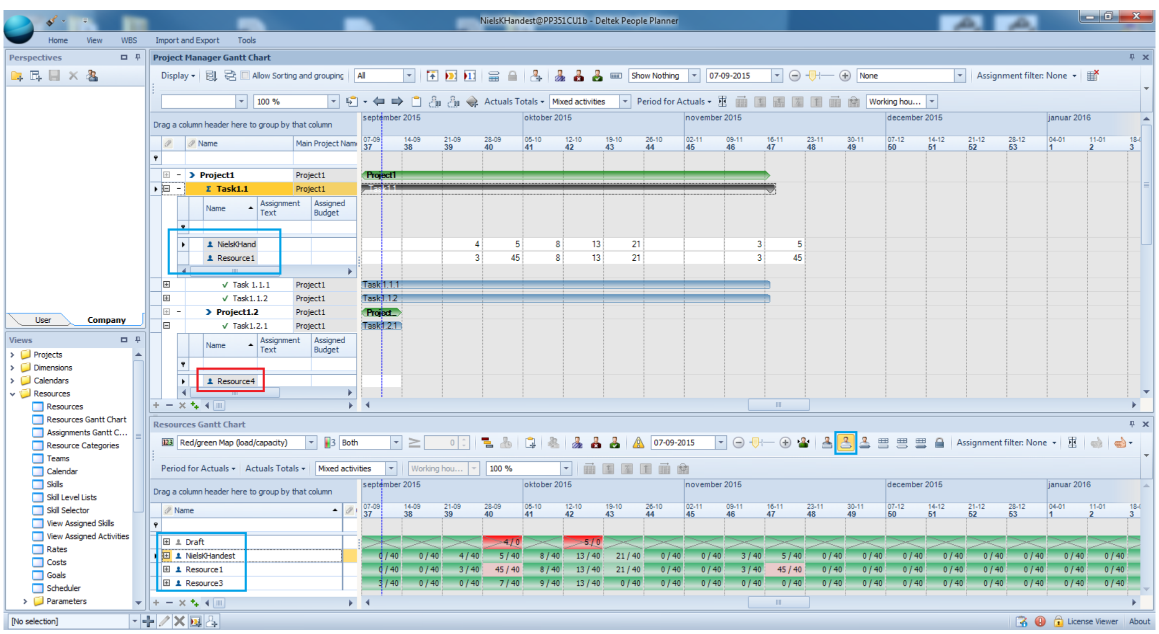
Using this, if you select an event in the PG; the RG then filters to show only the resources that have been assigned directly to that event. You can select more than one event. The following shows an example of viewing only the resources that are assigned to selected events.



View Only Resources Assigned to Selected Projects

Using this, if you select an event in the PG; the RG then filters to show only the resources that have been assigned directly to the project that owns the event. The RG does not show resources that have been assigned to any subprojects, unless of course they are also assigned on the project.

In the following example, Resource4 is not shown in the RG because it is not assigned on the project; it is only assigned on a subproject.



View Only Resources Assigned to Selected Projects and Subprojects

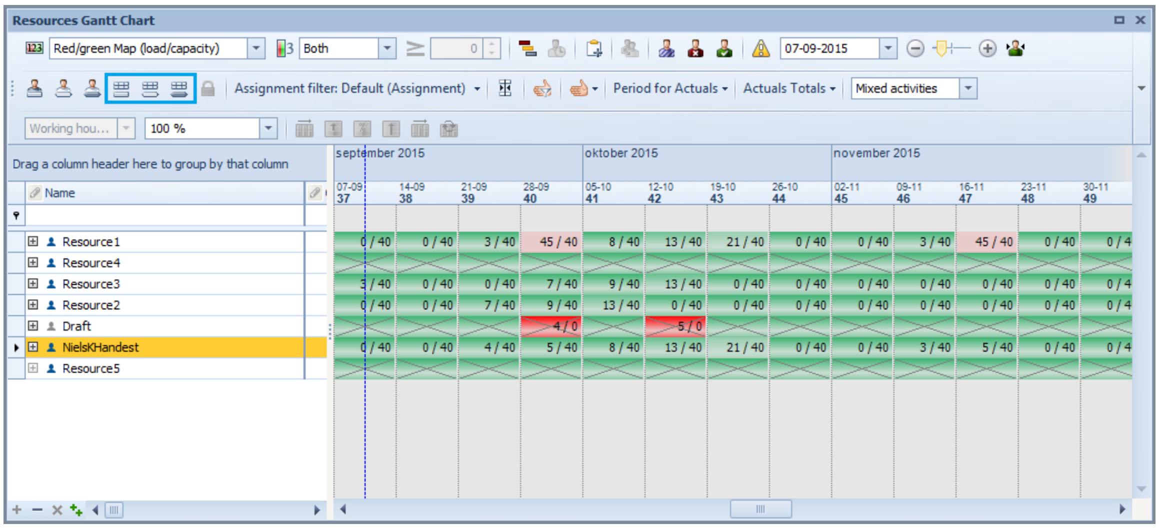
Using this, if you select an event in the PG; the RG then filters to show only the resources that have been assigned directly on the project that owns the event. The RG also shows resources that have been assigned to any subprojects.

View Only Assignments for Selected …

The RG has a group of three buttons that filter which assignments are shown, depending on what events are selected in the PG:

- **View Only Assignments for Selected Events**
- **View Only Assignments for Selected Projects**
- **View Only Assignments for Selected Projects and Subprojects**

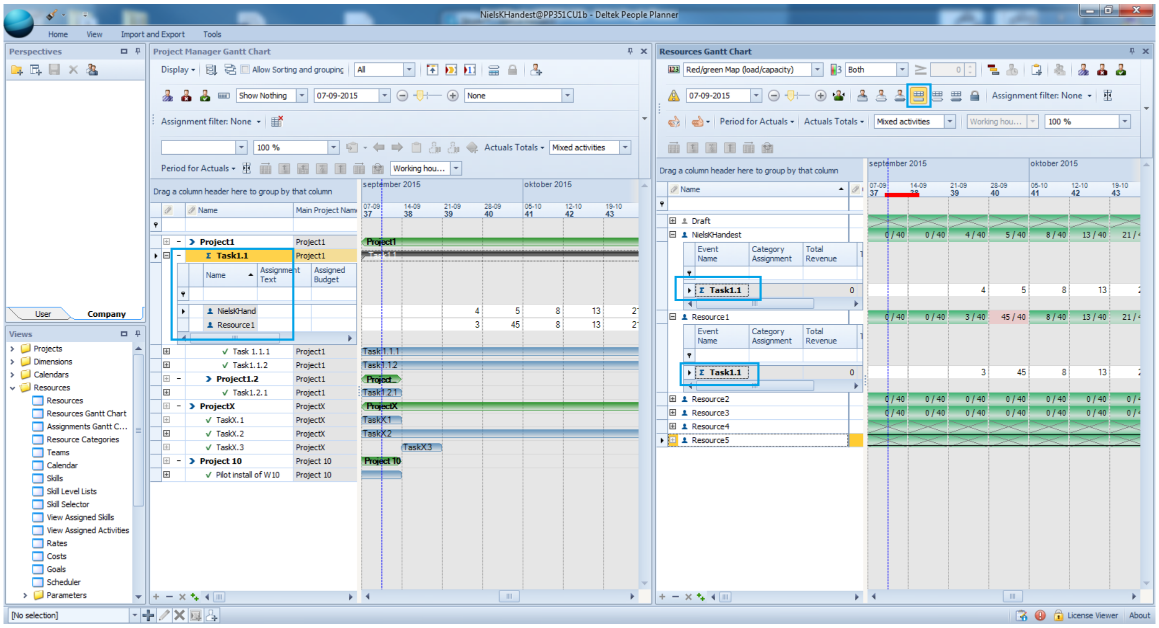
The following example shows the three View Only Assignments for Selected … buttons.



See also Sum when Filtering.

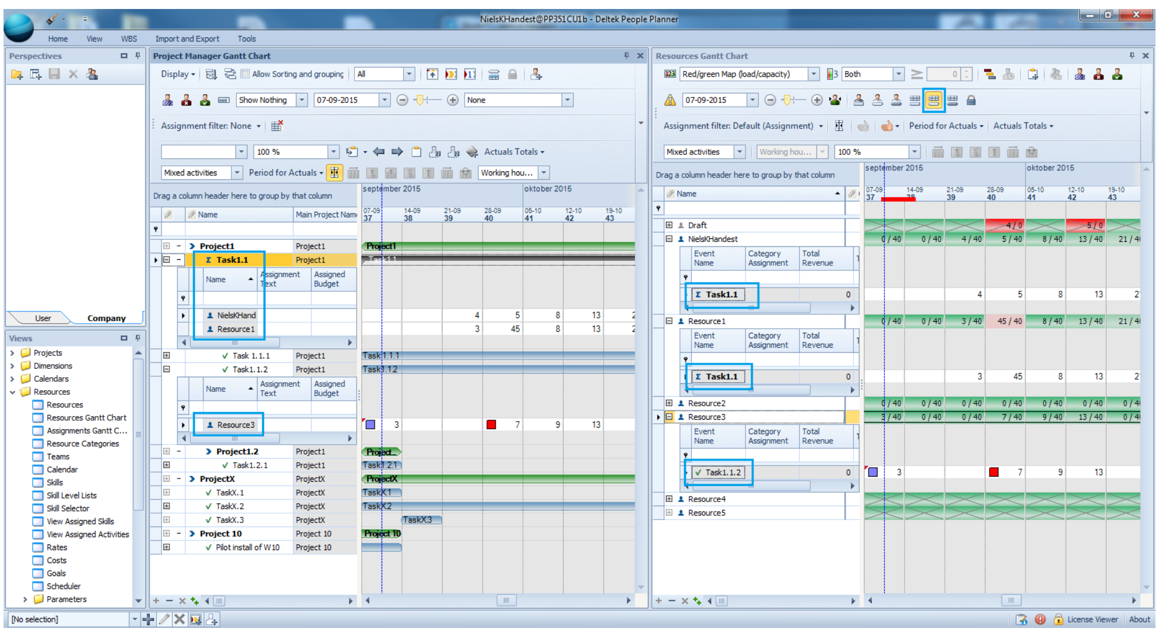
View Only Assignments for Selected Events

Using this, if you select an event in the PG; the RG then filters to show only the assignments that are directly on that event. However, you can select more than one event. The following is an example of viewing only assignments for selected events.



View Only Assignments for Selected Projects

Using this, if you select an event in the PG; the RG then filters to show only the assignments that are on the project that owns the event. The RG does not show assignments on any subprojects of that project. The following is an example of viewing only assignments for selected projects.



View Only Assignments for Selected Projects and Subprojects

Using this, if you select an event in the PG; the RG then filters to show only the assignments that are on the project that owns the event. Included in this are assignments on any subprojects of the project.

Lock View (RG)

When you have found the appropriate resources and/or assignments, and they are currently shown in the RG, you can lock the RG by clicking the **Lock View** button.

You can then work in the PG by, for example, selecting other events, without having to be concerned that the RG is updated to show something else.

Project Status, Type, and Group

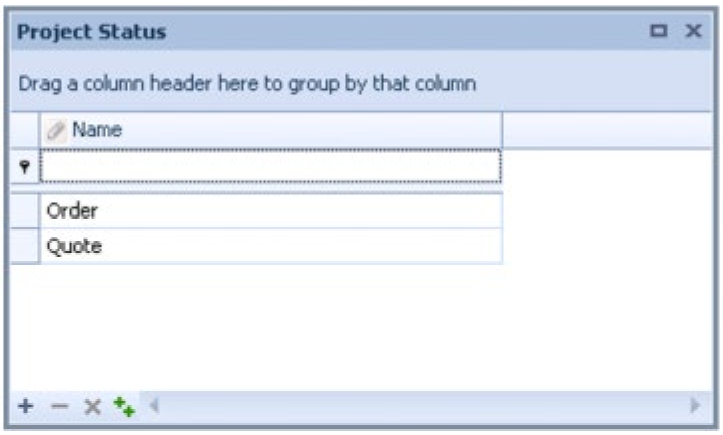
The Project Status, Type, and Group are ways to categorize your projects. When a project is imported from Maconomy, it may inherit a project status, type, or group from Maconomy.

> **Note:** Although they are normally imported from Maconomy you can also create them in People Planner. This is most useful if People Planner is a standalone system.

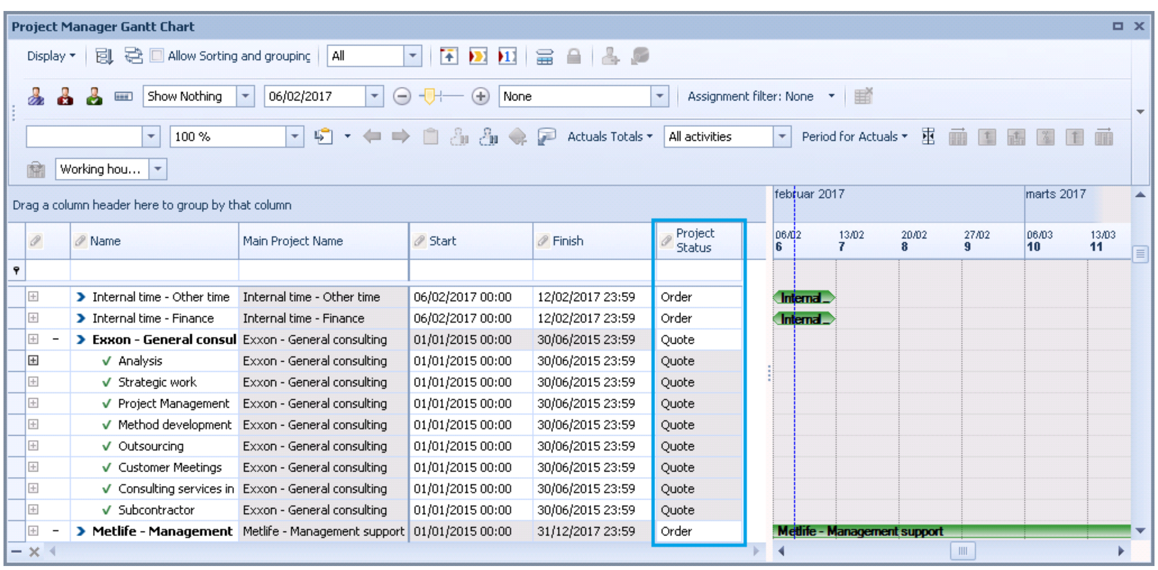
In the PG, you can use them to filter on which projects you want to see, and in the RG, you can filter on assignments according to the values on the projects. See also Sum when Filtering.

Project Status

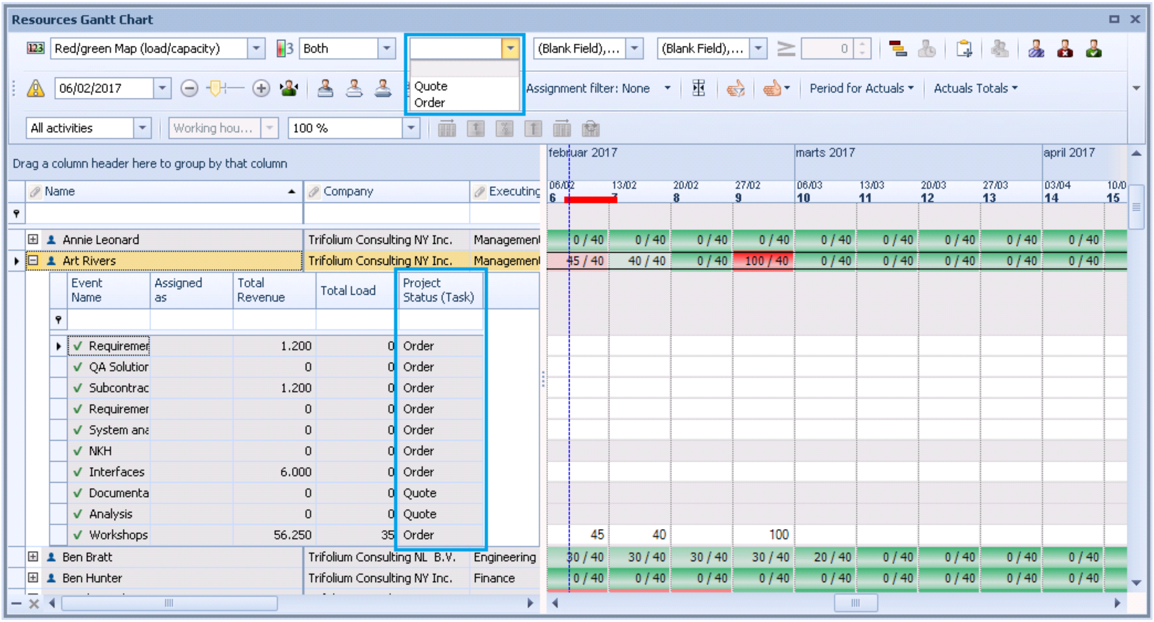
You see the available project statuses in the view with the same name, which is located at **Views » Projects » Parameters » Project Status**.



You can add the **Project Status** column in the PG as a column in the main grid. The project status is assigned directly on the project, and is inherited by all of the tasks on the project.

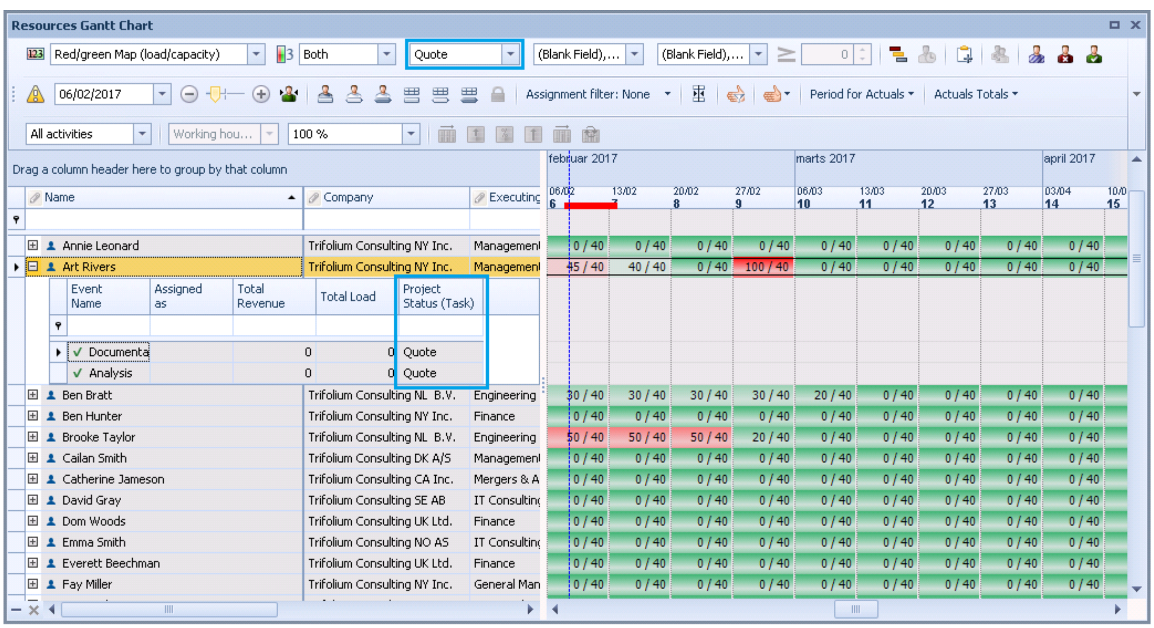


In the RG, you can add it as a column in the assignments sub-grid. The **Project Status Filter** then controls which of the assignments are shown according to the project status.



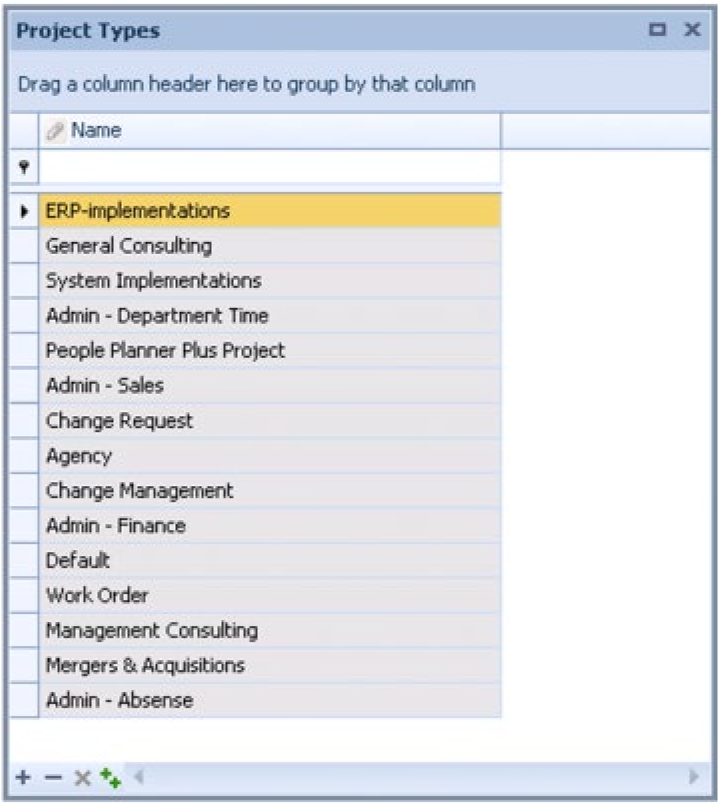
Note: The Project Status Filter was added in People Planner 3.6.1.

For example, when you select “Quote,” it shows you the assignments on projects with Project Status = “Quote.”

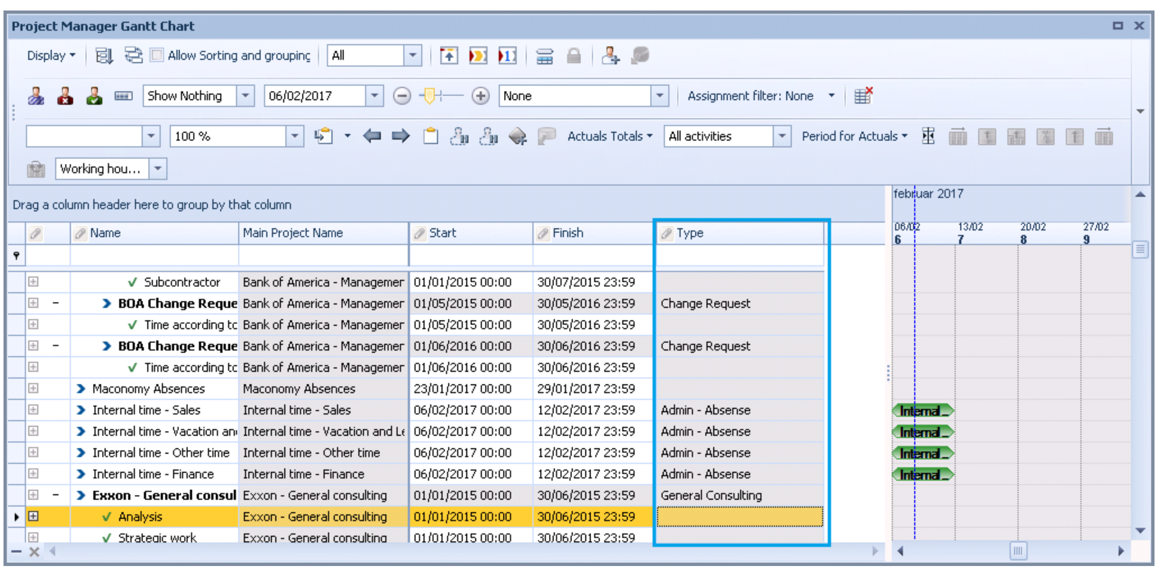


Project Type

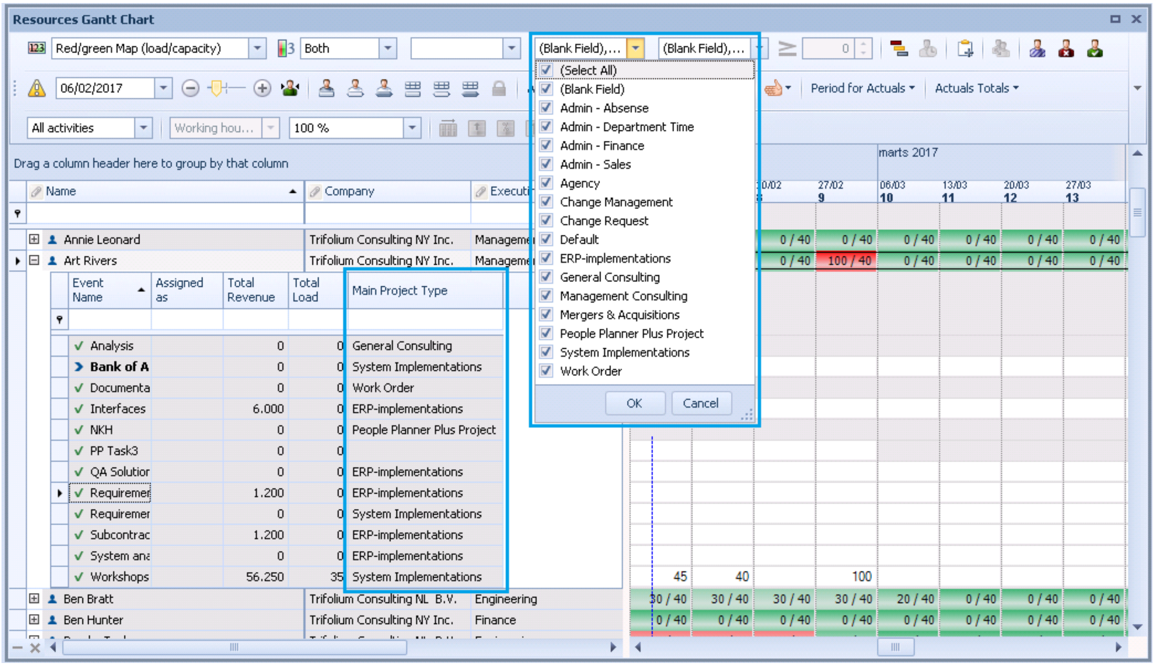
You can use the Project Types view to see which project types exist in the system via **Views » Dimensions » Project Types**.



To see the Project Type of your projects, you must add the Type column to the PG. The project type is set on the project level, but it is, unlike the project status, not inherited by the tasks on the project.

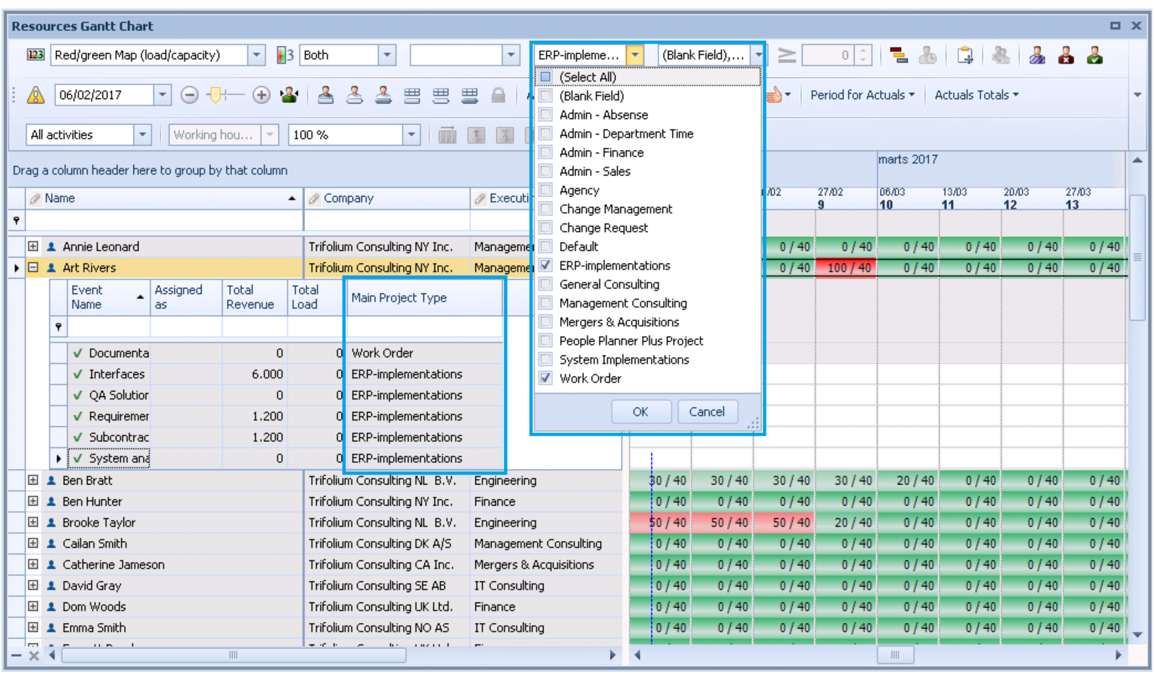


In the RG, you can add it as a column in the assignments sub-grid. The **Project Type Filter** then controls which of the assignments are shown according to the project type.



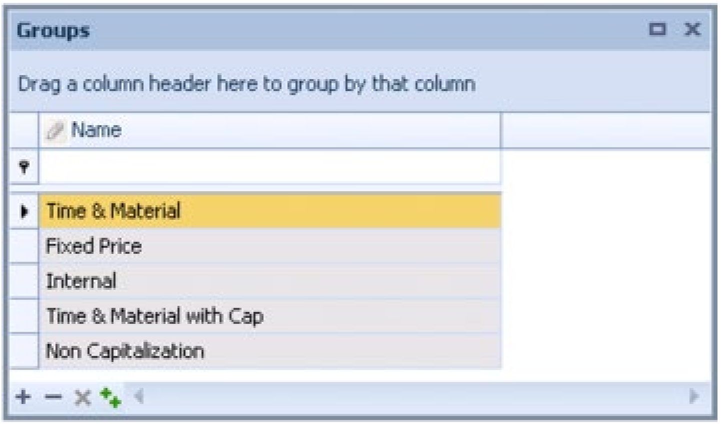
Note: The Project Type Filter was added in People Planner 3.7.

You can select one or more types to see.

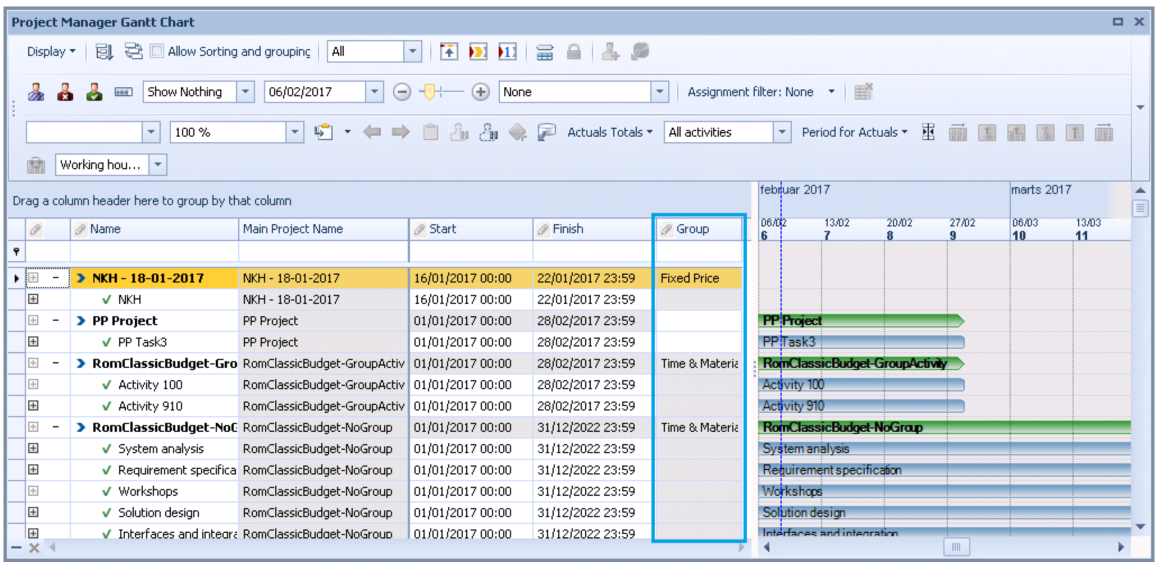


Project Group

The Groups view shows you the Project Groups in the system via **Views » Projects > Parameters » Groups**.



You add the **Groups** column in the PG to see the project groups of the projects. The project group is a property directly on the project, and it is not inherited of the individual tasks on the projects.

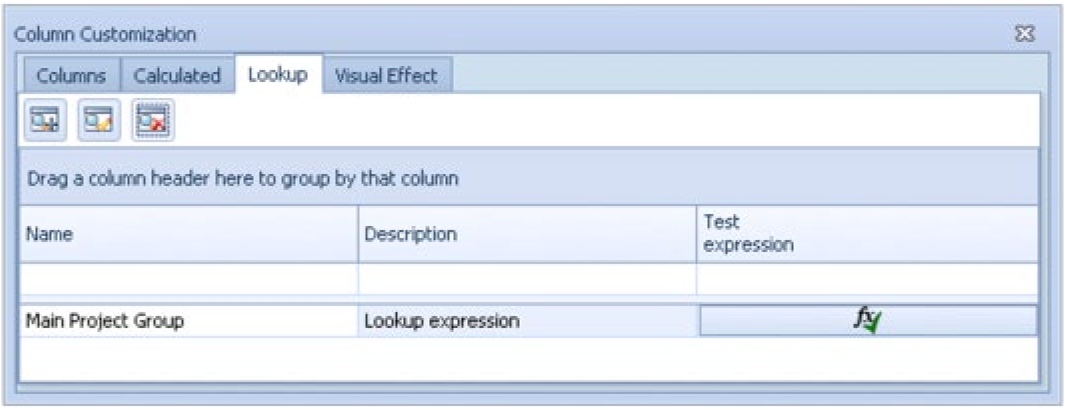


This column does not exist in the assignment sub-grid, but you can create it yourself using a lookup column.

To create the column using a lookup column:

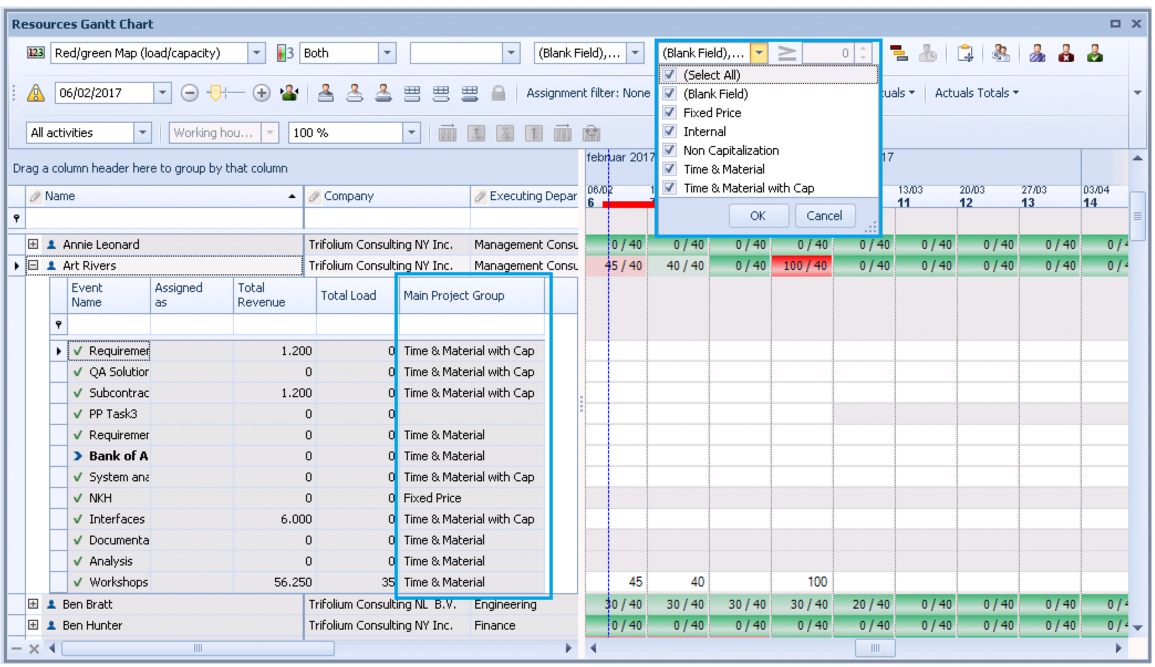
1. Open the RG, and expand the assignment sub-grid.
2. Right-click on the header in the sub-grid. This opens a shortcut menu.
3. Choose **Column Chooser** from the shortcut menu. This opens the **Column Customization** dialog.
4. Click the **Lookup** tab in the **Column Customization** dialog.
5. Click the **Add Lookup** button. This opens the **Lookup** dialog.
6. Choose **Main Project (Task) » Group** in the **Lookup** dialog.

7. Rename it to something like **Main Project Group**.
8. Click the **Ok** button to save it.



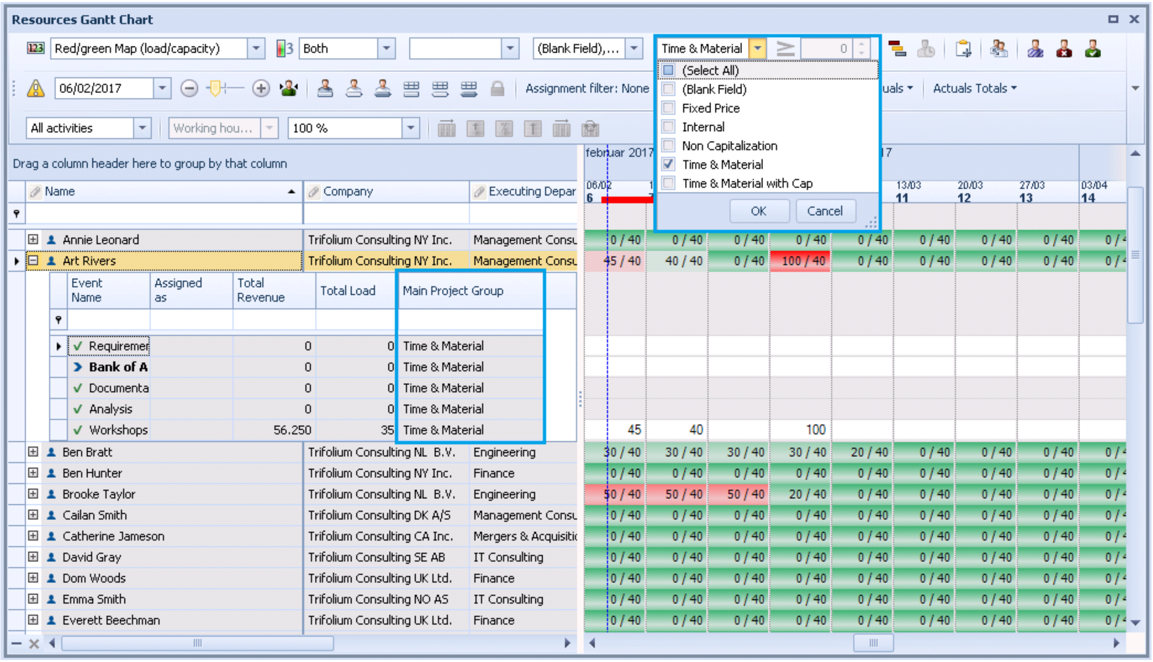
9. Add the lookup column to the assignment sub-grid by dragging it.

The **Project Group Filter** controls which of the assignments are shown according to the project type.



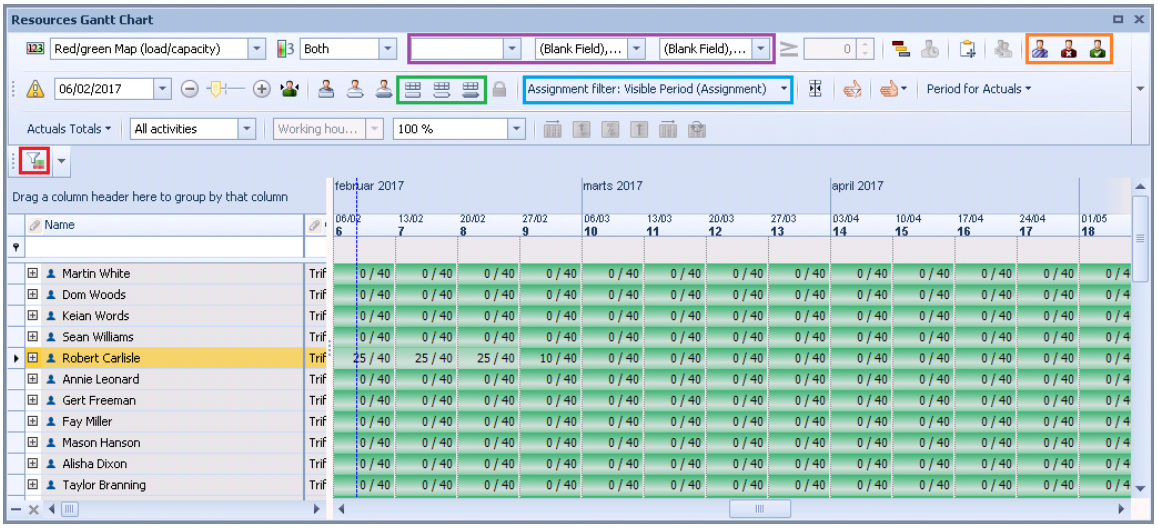
Note: The Project Group Filter was added in People Planner 3.7.

You can select one or more groups that you want to see.



Sum when Filtering

The RG has different filters that filter which assignments should be shown to the user.



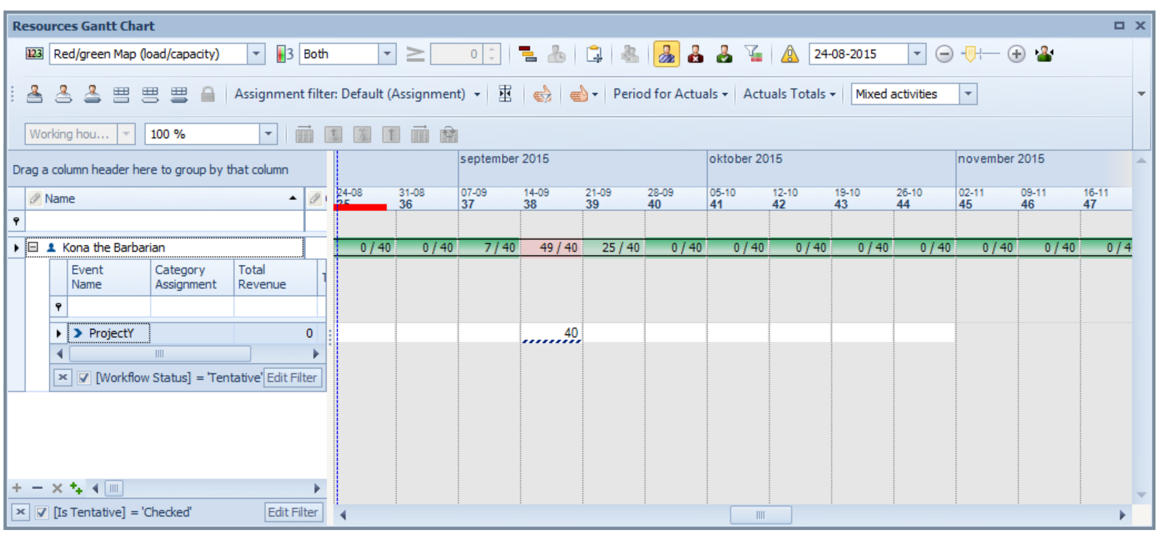
The figure shows these filters, moved into the same tool bar for convenience:

- [Orange] Filter on the Workflow Status
- [Green] View Only Resources Assigned to Selected …
- [Blue] Assignment filters
- [Purple] Filter on Project Status, Type, and Group

The rest of this section uses the Workflow Status filters as the example. It describes how the **Summarize only Filtered Resources** button (red) works with the filters.

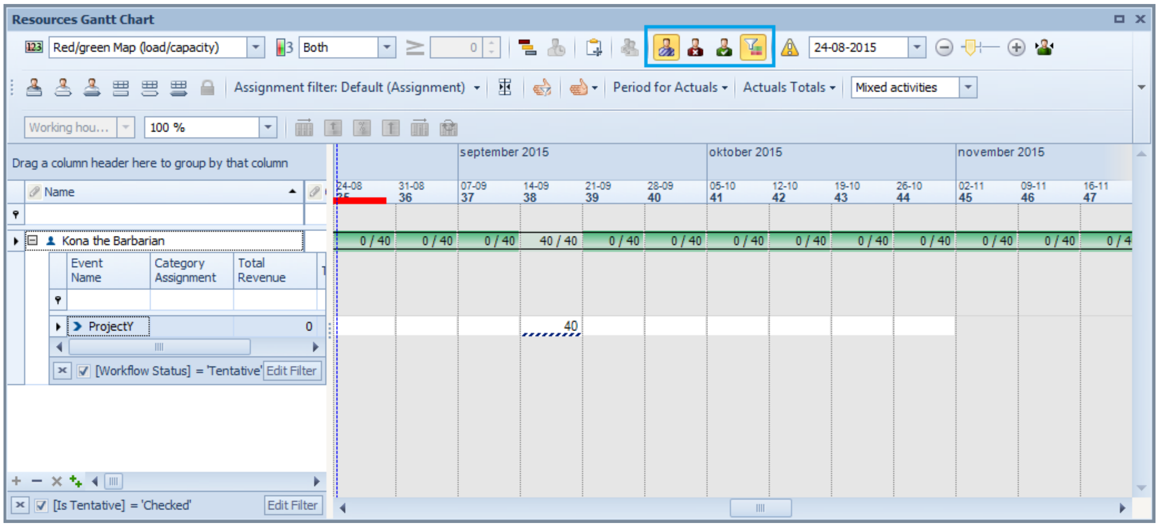
When the RG is filtered on assignments, the numbers on the resource line are not required to be the same as the sum of the individual assignment lines. For an example, see the preceding figure.

The following figure shows that by default, the resource line shows the sum of all assignments.



This is because it is the sum of all of the assignments, including the ones that are currently filtered away.

If the resource line should show only the sum from the assignments that are currently visible, add the **Summarize only Filtered Resources** button and click it. The following is an example that shows only the sum of the visible assignments.



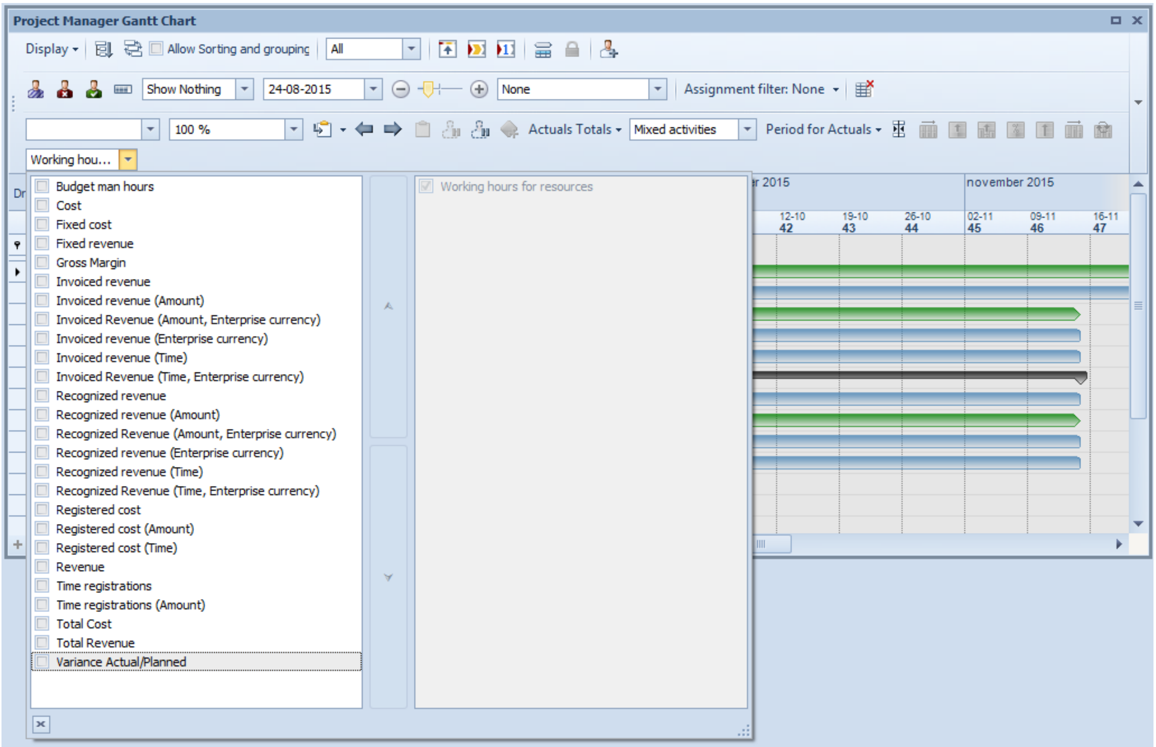
The functionality of the **Summarize only Filtered Resources** button is not strictly the same for all of these filters.

Filter	Description
[Orange] Filter on the Workflow Status	Works with the button as described.
[Green] View Only Resources Assigned to Selected …	Beginning with People Planner 3.6.1, this works with the button. Previously it did not.
[Blue] Assignment filters	Does not work with the button. The resource line shows the sum of bookings for all assignments including those that are currently filtered away.
[Purple] Filter on Project Status	Works with the button as described.

Accounts

Allocations/bookings are just one of several accounts. You can also create your own accounts.

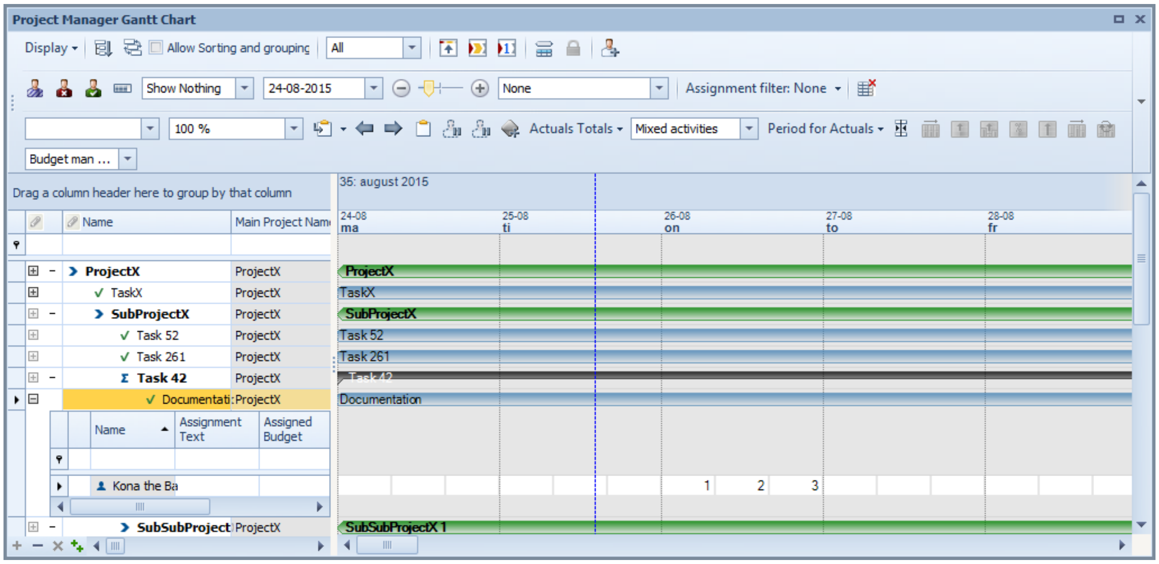
Note: In the PG, to show the available accounts, use the Man Hours control.



- The left side shows the available accounts, minus the accounts that are already made visible.
- The right side shows the accounts that are currently visible.

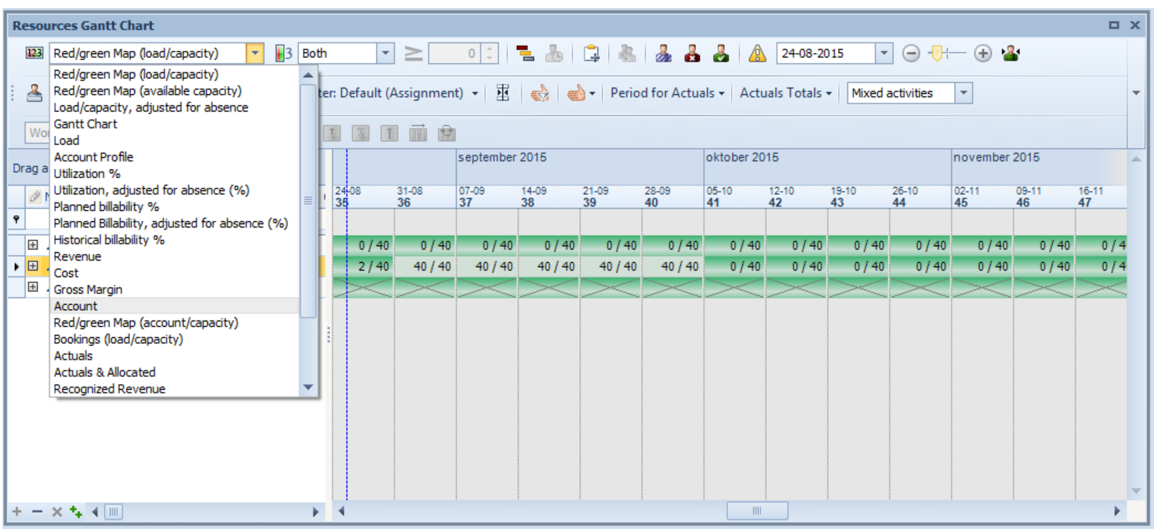
You can add and remove accounts from the right side by using the check boxes.

At least one account must be visible at all times, and there can be up to four accounts in the PG. The order in which the accounts are shown can be determined by using the two arrow buttons between the two sides.

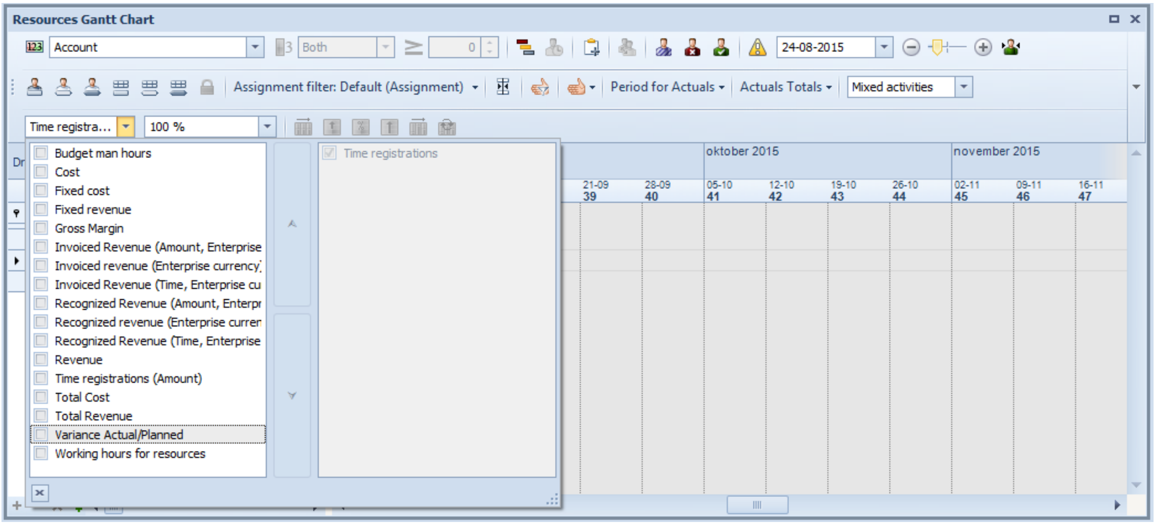


For each visible account, there is space for a number in each cell.

Note: In the RG, to show the available accounts, first select **Account** in the Main Display control.



After this, the **Accounts** control is enabled, and you can select the visible accounts in the same way as in the PG.



At least one account must be visible at all times, and there can be up to four accounts in the PG. The order in which the accounts are shown can be determined by using the two arrow buttons between the two sides.

Note: The RG does not display all of the accounts that are available from the PG.

People Planner includes the following accounts:

- Amount Line Account (introduced in People Planner 3.8.4)
- Budget Man Hours
- Cost
- Fixed Cost
- Fixed Revenue
- Gross Margin
- Invoiced Revenue
- Invoiced Revenue (Amount)
- Invoiced Revenue (Enterprise Currency)
- Invoiced Revenue (Time)
- Invoices Revenue (Amount, Enterprise Currency)
- Invoices Revenue (Time, Enterprise Currency)
- Recognized Revenue
- Recognized Revenue (Amount)
- Recognized Revenue (Amount, Enterprise Currency)
- Recognized Revenue (Enterprise Currency)
- Recognized Revenue (Time)
- Recognized Revenue (Time, Enterprise Currency)
- Registered Cost

- Registered Cost (Amount)
- Registered Cost (Time)
- Revenue
- Time Registrations
- Time Registrations (Amount)
- Total Cost
- Total Revenue
- Variance Actual/Planned
- Working Hours for Resources

Many of these accounts do not have any associated functionality in People Planner, but are there because of historical reasons or to hold values imported from Maconomy.

Amount Line Account

This is the account where amount bookings are stored.

This account was introduced in People Planner 3.8.4.

Budget Man Hours

The Budget Man Hours account acts as a budget that has been distributed over specific dates.

Events can have a budget for the whole event, but there is no direct connection between such a budget and the Budget Man Hours account.

This account is associated with the functionality of the **Book Budget Hours on Available Capacity** button. See Book Budget Hours on Available Capacity.

Time Registrations

When time registrations are imported from Maconomy into People Planner, they are stored in this account. Another name for this account is Actuals.

Working Hours for Resources

This is the account where bookings are stored. Other terms for this are Allocation and Man-Hour Entries.

Actuals Accounts

Time registrations are an example of an actuals account. “Actuals” refers to the actual values of something, as opposed to the planning values.

When a project is being planned, resources are being booked on events according to how much time it is estimated they will need. As the project progresses, the resources start making time registrations. The bookings are the estimated/planned values, and the time registrations are then the actual values.

Actuals accounts can be imported from the ERP system, for example, Maconomy, or they can be edited directly from People Planner.

The actuals accounts are:

- Invoiced Revenue (Amount)
- Invoiced Revenue (Time)
- Recognized Revenue (Amount)
- Recognized Revenue (Time)
- Registered Cost (Amount)
- Registered Cost (Time)
- Time Registrations
- Time Registrations (Amount)

Amount and Time Accounts

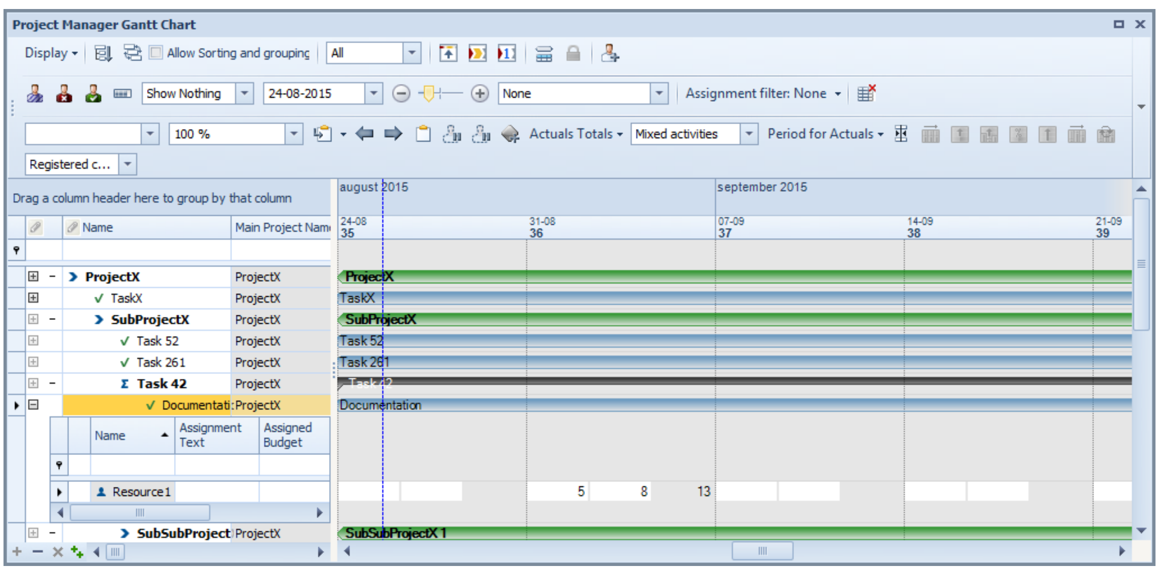
Some of the actuals accounts come in triples of one “Amount” account, one “Time” account, and one account that is the sum of the other two accounts—for example, this set of three accounts:

- Registered Cost (Amount)
- Registered Cost (Time)
- Registered Cost

For these accounts, the third account displays the sum of the two others:

$$Registered\ Cost = Registered\ Cost\ (Amount) + Registered\ Cost\ (Time)$$

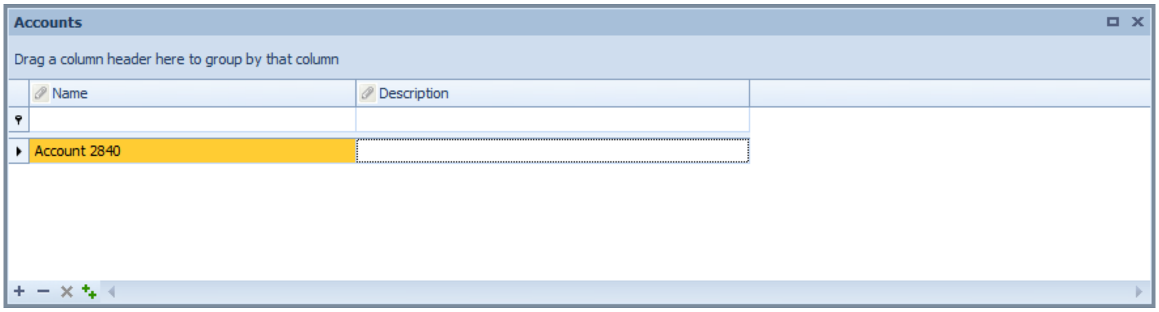
> **Note:** You cannot enter numbers directly into the third type of account. It only displays the sum of the other two accounts. Some accounts may be read-only because of privileges.



See [Activity Types] for information about the **Activity Types** control.

Custom Accounts

You can create custom accounts in People Planner via **Views » General » Accounts**. The following shows an example of defining a new account.



These accounts then appear as available accounts in both the PG and RG.

Period for Actuals

As the name implies, People Planner is primarily intended for planning—for ensuring that projects are staffed correctly, and to make sure that resources are used efficiently.

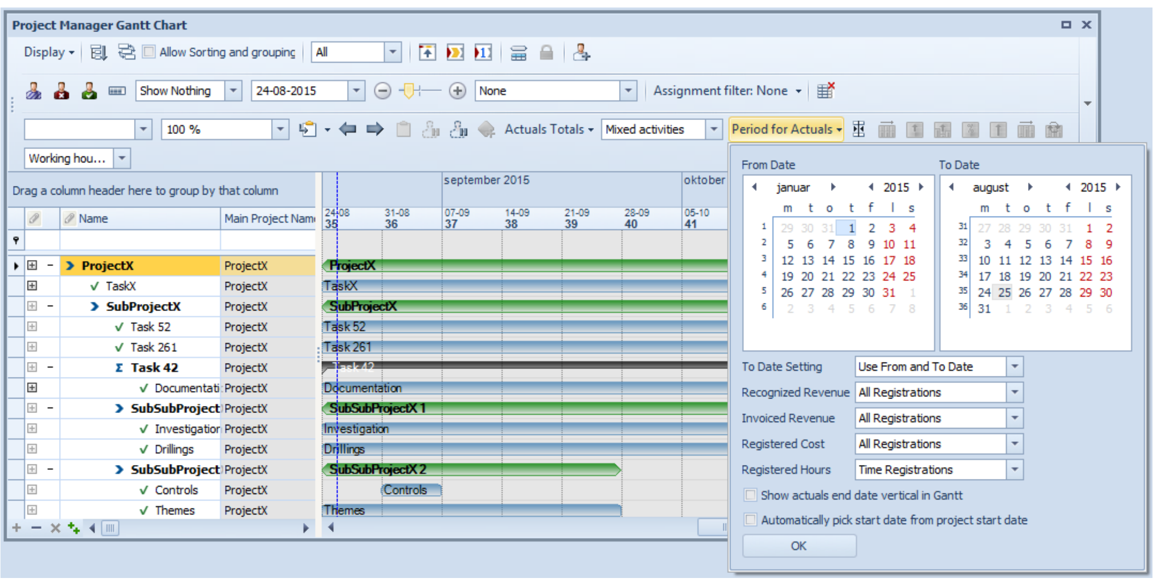
However, at some point reality catches up on the planning, in the sense that people start registering time on the project. When this happens, it becomes interesting to compare the original plan with the actual hours. People Planner can import time registrations from Maconomy.

> **Note:** Another possibility is to enter the hours directly into the Time Registration account in People Planner. However, People Planner does not support the concept of time sheets and is therefore not very suitable for users doing their time registrations like this.

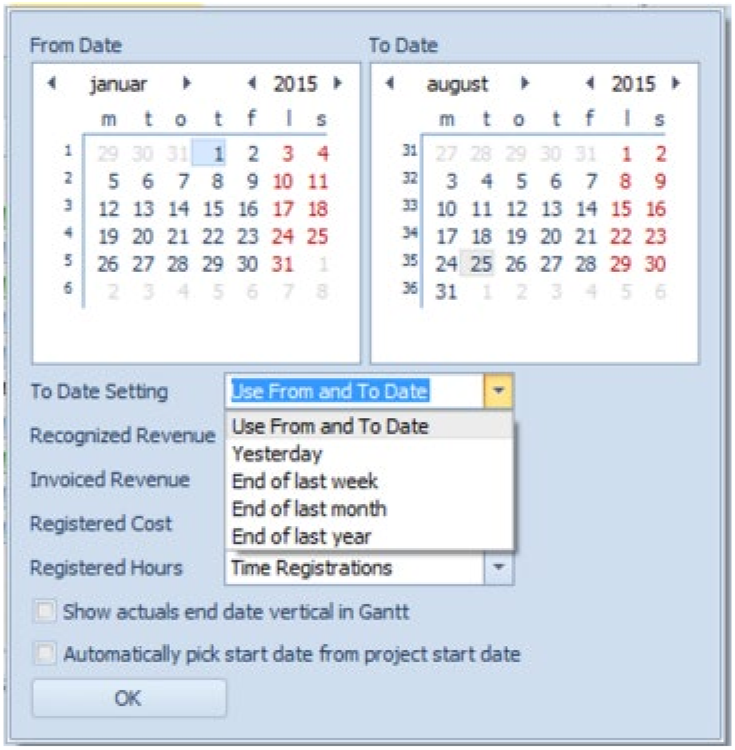
Time registrations are an example of an actuals account. See Actuals Accounts.

Set the Period for Actuals

You can use the Period for Actuals control in either the PG or the RG to set the period. The following figure shows the control for setting the Period for Actuals.



In addition to explicitly setting the To Date of the period, you can also set it to automatically update itself depending on the current date.



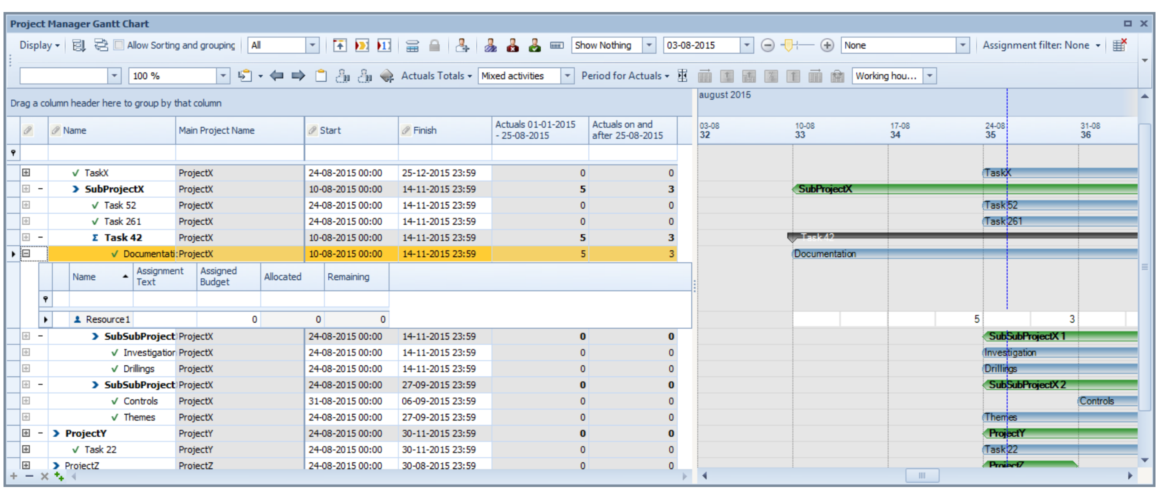
Columns that Depend on the Period for Actuals

Some columns adjust what they display, depending on the Period for Actuals.

These columns usually come in pairs, such as:

- Actuals 01-01-2015 – 25-08-2015
- Actuals on and after 25-08-2015

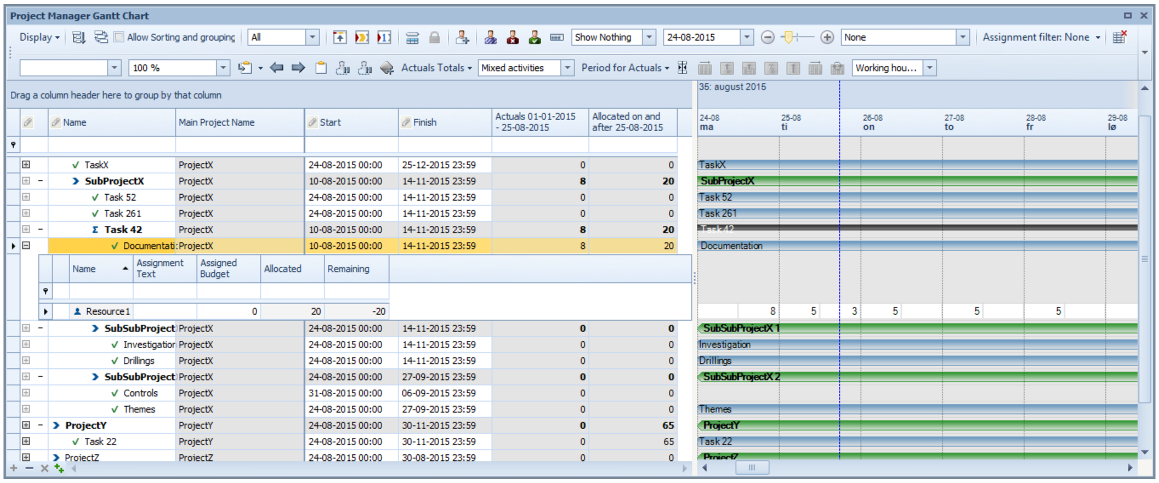
Together the columns add up to the total of hours of actuals—after 01-01-2015 in this case.



Example: Add Planned and Actual Hours

One example of how to use this is to get an estimate for how many hours will be spent on a project. When the project has begun, but is still running, some of the hours should come from actual time registrations, but those still in the future must come from the planning. The following figure shows these two columns added to the PG.

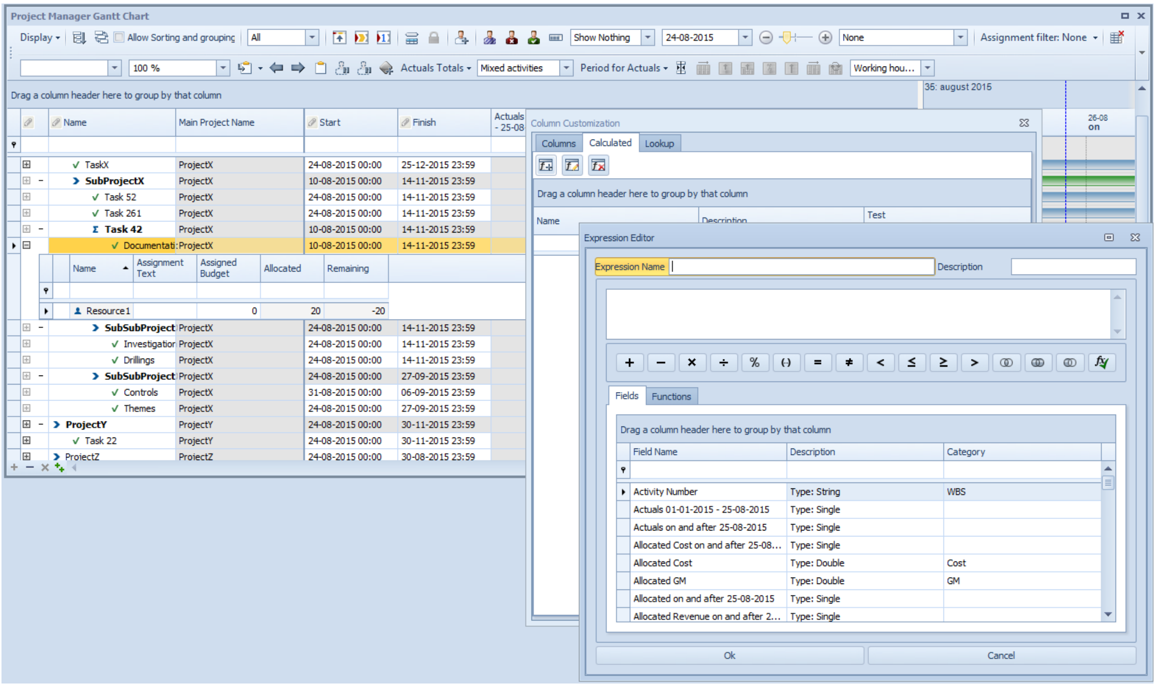
- Actuals 01-01-2015 – 25-08-2015
- Allocated on and after 25-08-2015



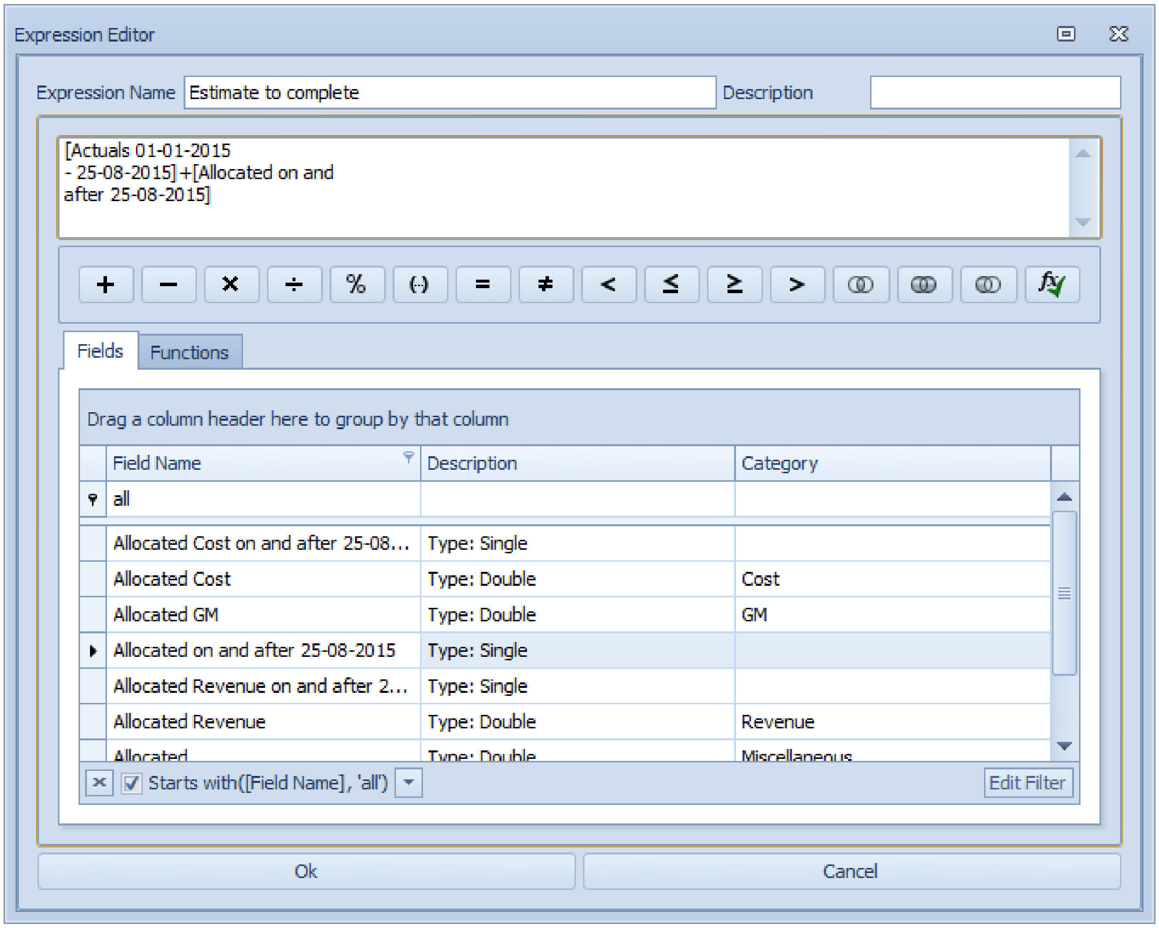
This is the starting point for the following procedure, by which you can add the two columns together as a calculated column.

To add the two columns together as a calculated column:

1. Right-click on the column headers. The shortcut menu opens.
2. Select **Column Chooser**. The **Column Customization** dialog opens.
3. Click on the **Calculated** tab.
4. Click the **Create a new expression** button. The **Expression Editor** dialog opens.

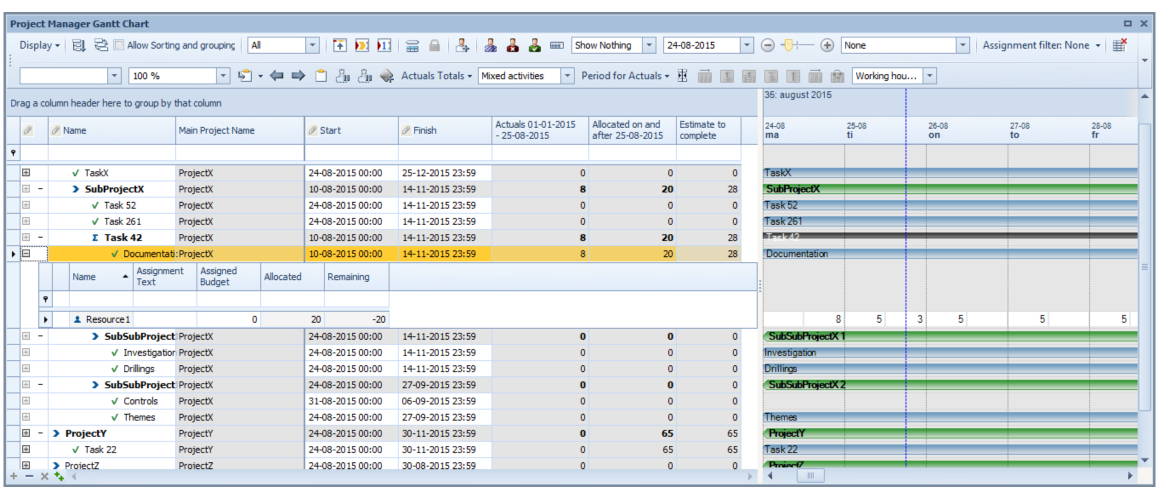


5. Choose a name for the new column, and define how it is calculated. In this example, the new column name is **Estimate to complete**.



6. Click **Ok** to save.
7. Return to the **Column Customization** dialog and double-click on the new **Estimate to complete** column to add it to the PG.

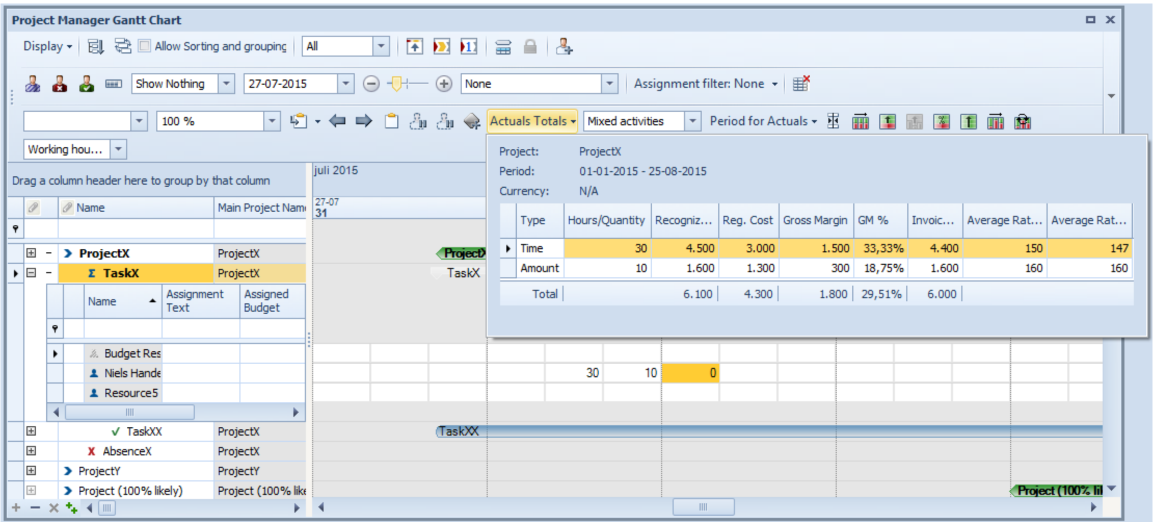
   At this point, the new column appears in the PG, as the following figure shows.



Actuals Totals

The **Actuals Totals** button opens a small window that shows some of the actuals summarized over the Period of Actuals.

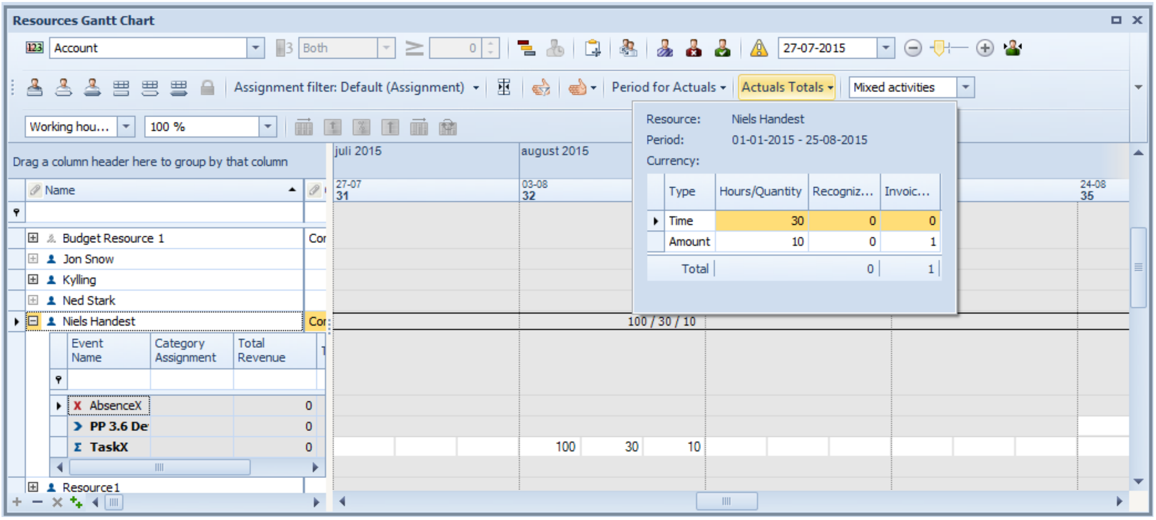
In the PG, the window shows the values totaled over the currently selected project. In the following figure, the PG shows the three accounts Working Hours …, Time Registrations, and Time Registrations (Amount) in the background.



The following table describes this example.

Column	Description
Hours/Quantity	Shows the summed accounts Time Registrations and Time Registrations (Amount).
Recognized Revenue	Shows the summed accounts Recognized Revenue (Time) and Recognized Revenue (Amount).
Reg. Cost	Shows the summed accounts Registered Cost (Time) and Registered Cost (Amount).
Gross Margin	Calculated as Recognized Revenue minus Reg. Cost.
GM%	Gross Margin calculated as a percentage: Gross Margin / Recognized Revenue times 100%.
Invoiced Revenue	Shows the summed accounts Invoiced Revenue (Time) and Invoiced Revenue (Amount).
Average Rate, Recognized	Calculated as Recognized Revenue / Time Registrations.
Average Rate, Invoiced	Calculated as Invoiced Revenue / Time Registrations.

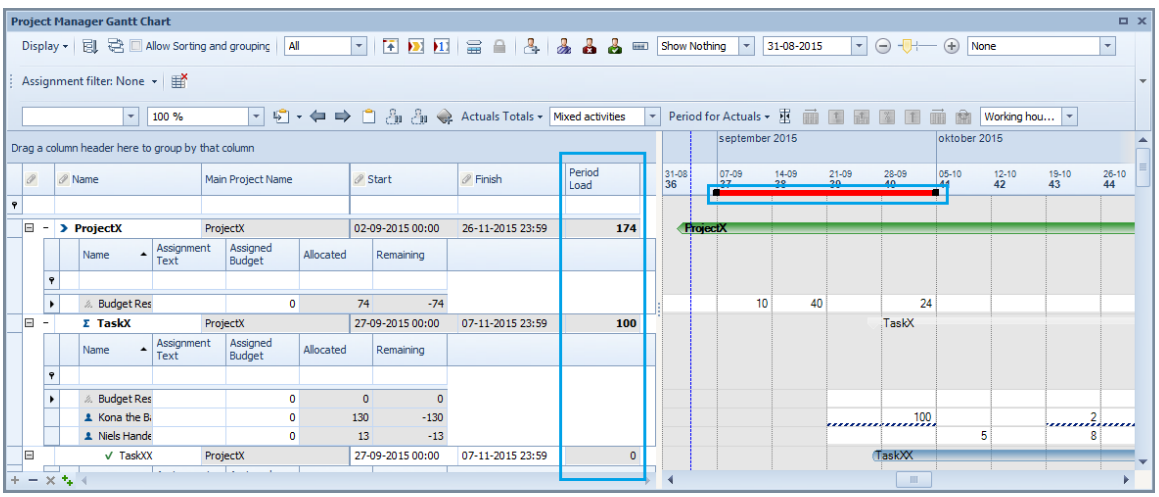
In the RG, the window shows the values totaled over the currently selected resource. In the following example, the RG shows the three accounts Working Hours…, Time Registrations, and Time Registrations (Amounts) in the background.



Period Load Column

Another way of working with periods is by adding the Period Load column.

When you add this column, a red bar is also added to the date-scale in the Diagram part of the PG/ RG. This represents a period, which you can resize by dragging the handles using the mouse. As you change the period, the Period Load column is continuously updated with the load over the period. The following example shows the Period Load column added to the PG.



There are other columns with the same basic functionality—except, of course, that they summarize the numbers of other accounts. An example is the Period Actuals column that sums over the time registrations. This column should not be confused with the Period of Actuals control; see Period for Actuals.

Main Display Views

When you customize a view, you can save the new layout as a perspective. You can even save a setup that contains several views as a perspective.

Main Display Views can be considered to be lightweight perspectives.

When opening a perspective, People Planner first closes every open view and then opens the ones that are part of the perspective (including any customizations). In contrast, a Main Display View keeps the PG/RG open and changes the content.

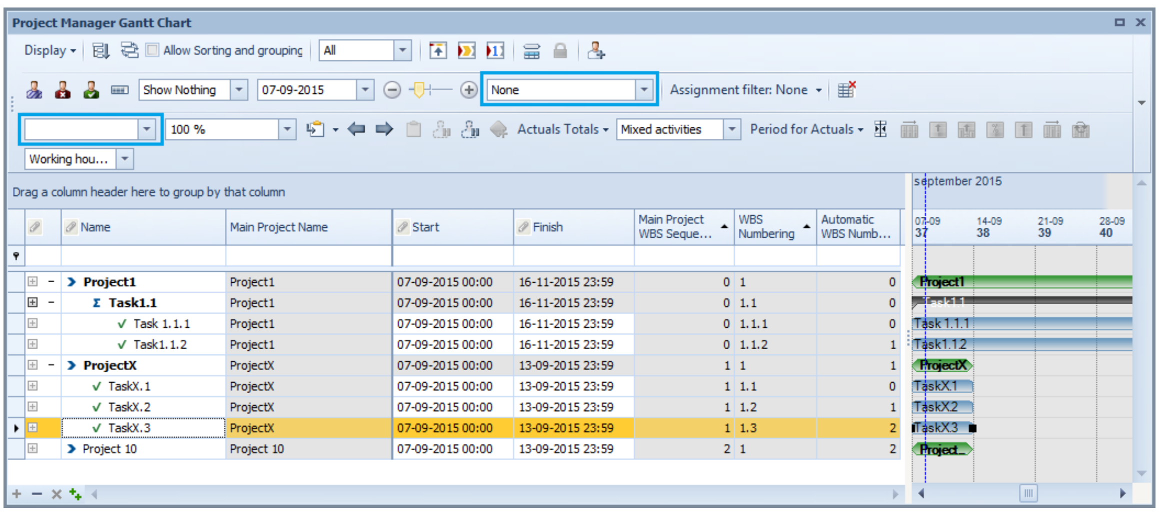
A Main Display View defines:

- Which accounts should be included in the PG/RG.
- Which columns should be included in the PG/RG.
- Values of the Display control; see Display Settings.
- A few other things; see Create a Main Display for the PG.

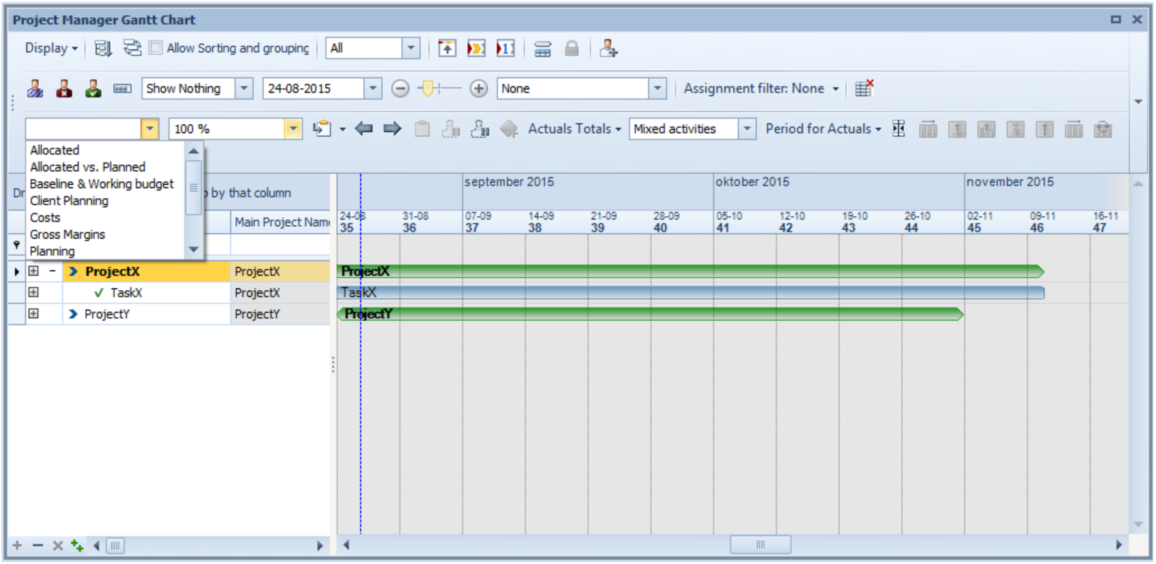
Main Display Views of the PG

The PG has two controls with almost identical function:

- Main Display View
- Display (Main Display)



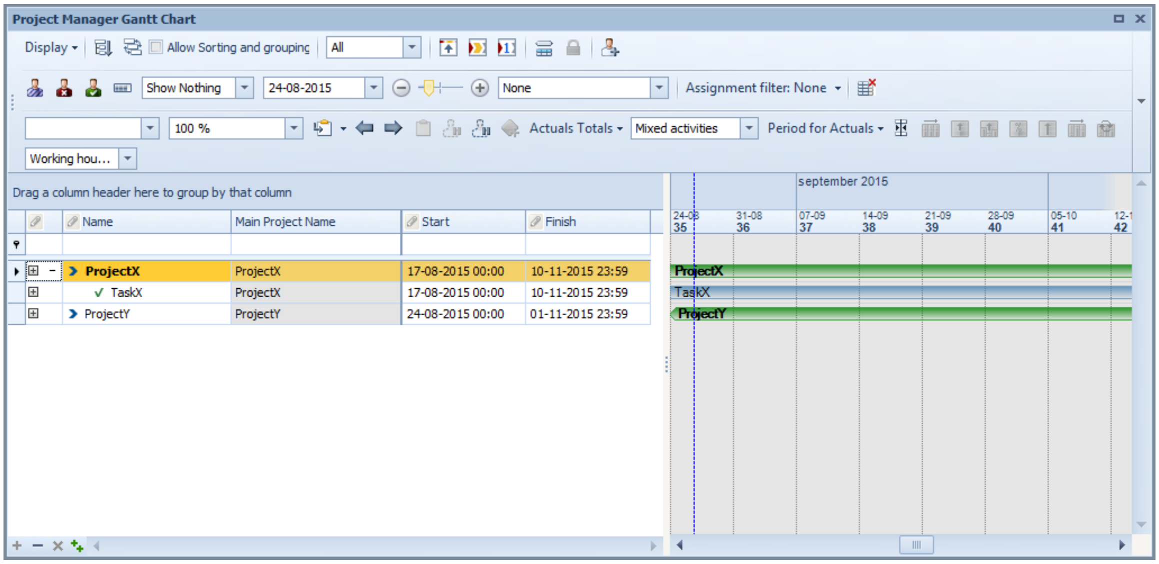
This section describes only the Main Display View. For information about some of the special functionality of the Display (Main Display) control, see Activity Types. The following is an example of Main Display Views in the PG.



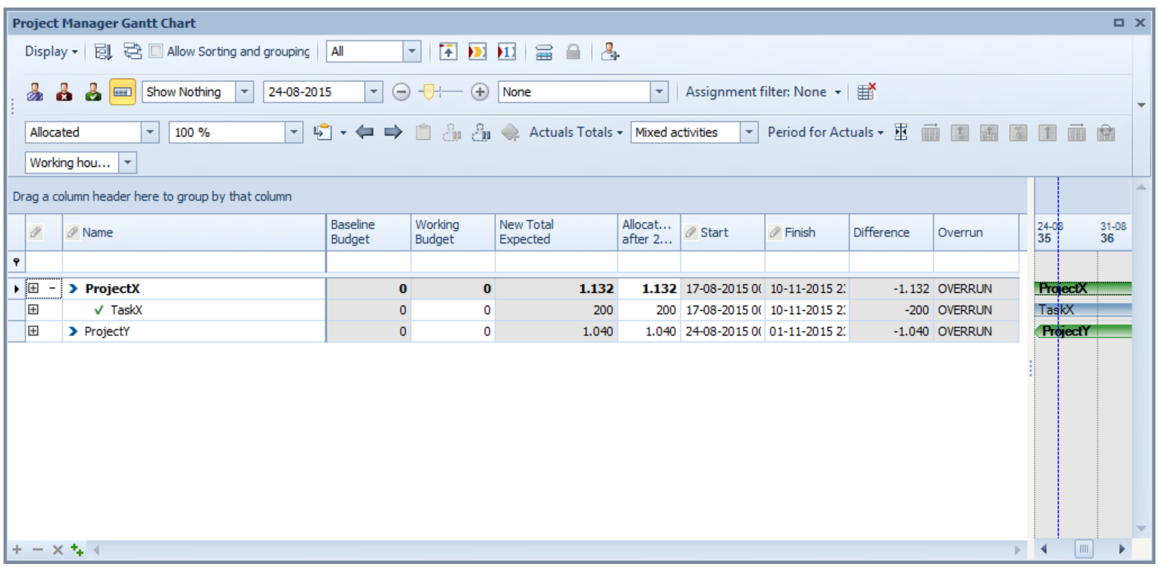
The PG contains the following Main Display Views:

- Allocated
- Allocated vs Planned
- Baseline & Working Budget
- Client Planning
- Costs
- Gross Margins
- Planning
- Progress
- Revenue

Default Main Display View

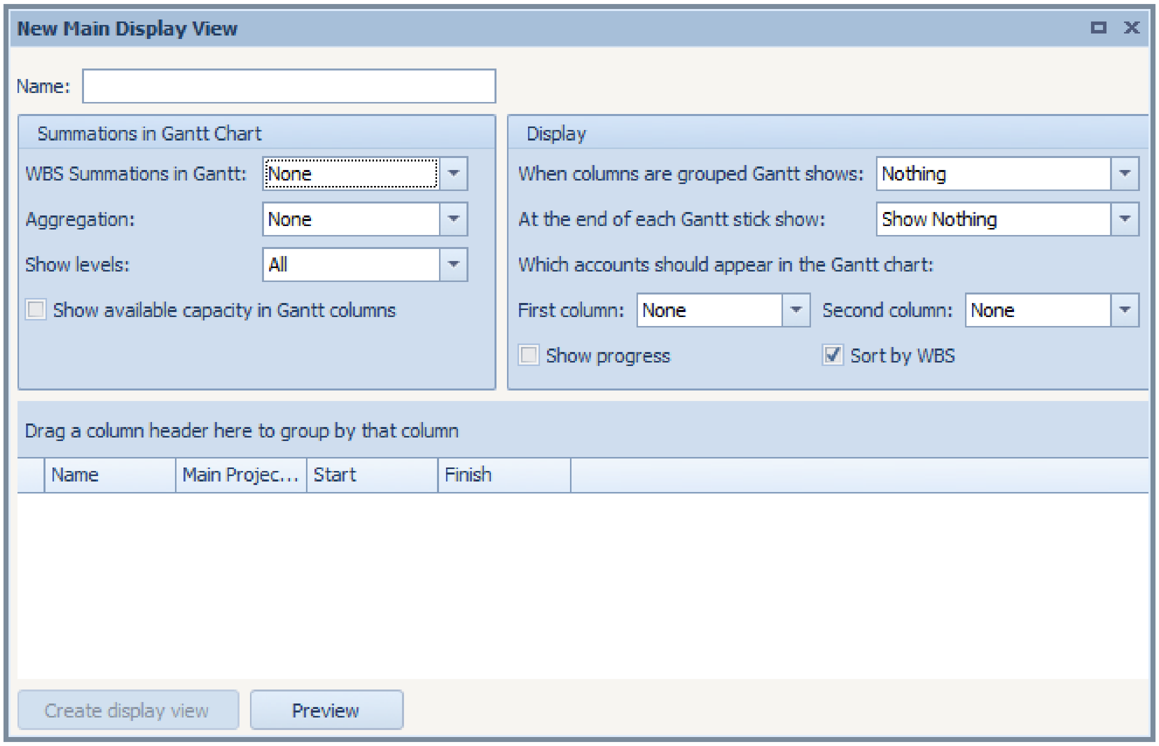


Allocated Display View

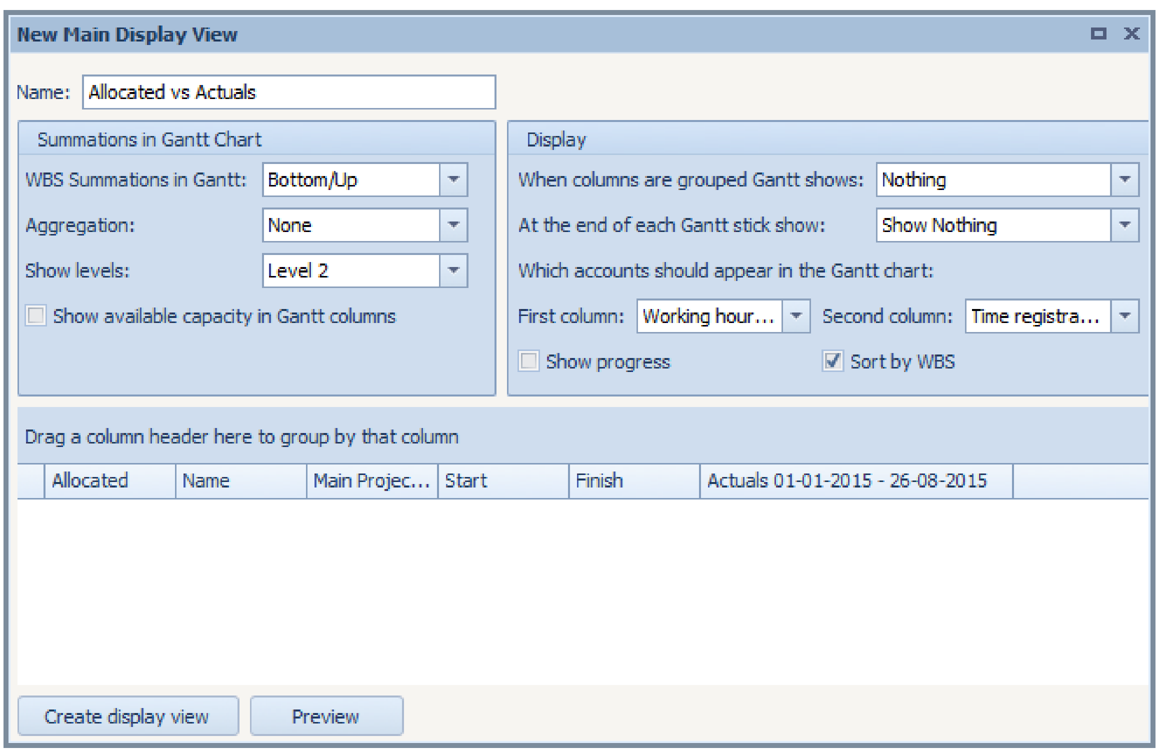


Create a Main Display for the PG

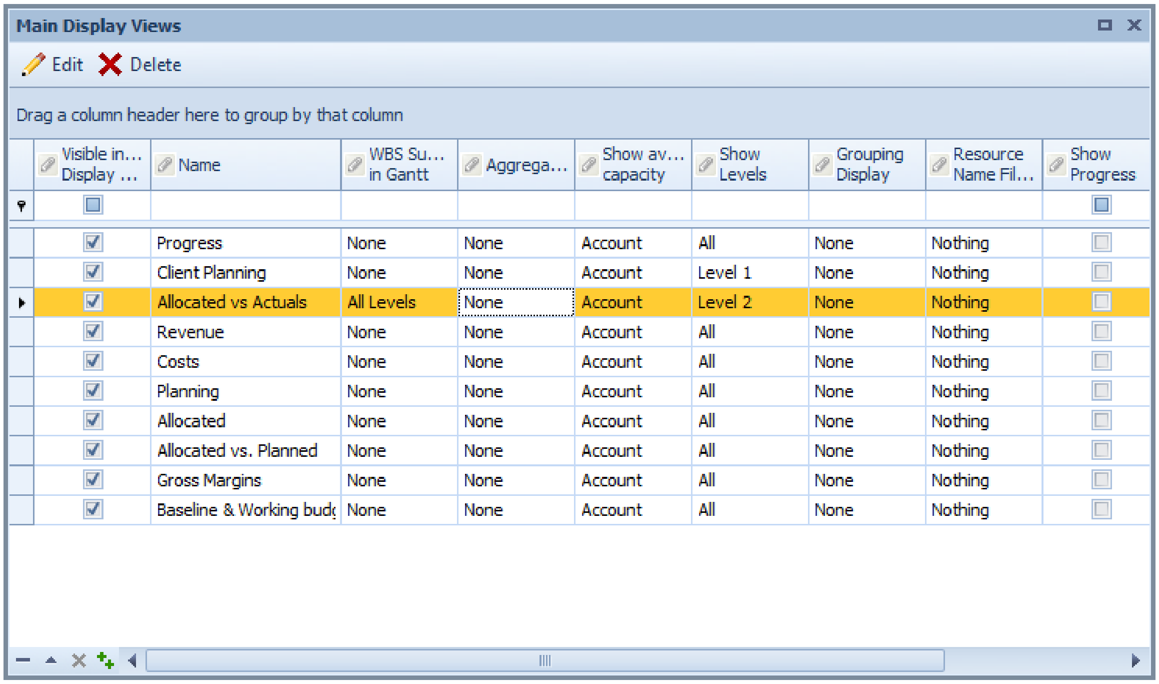
You can create a Main Display View via **Views » Projects » New Main Display View**.



The following shows an example of the settings for a new Main Display View.



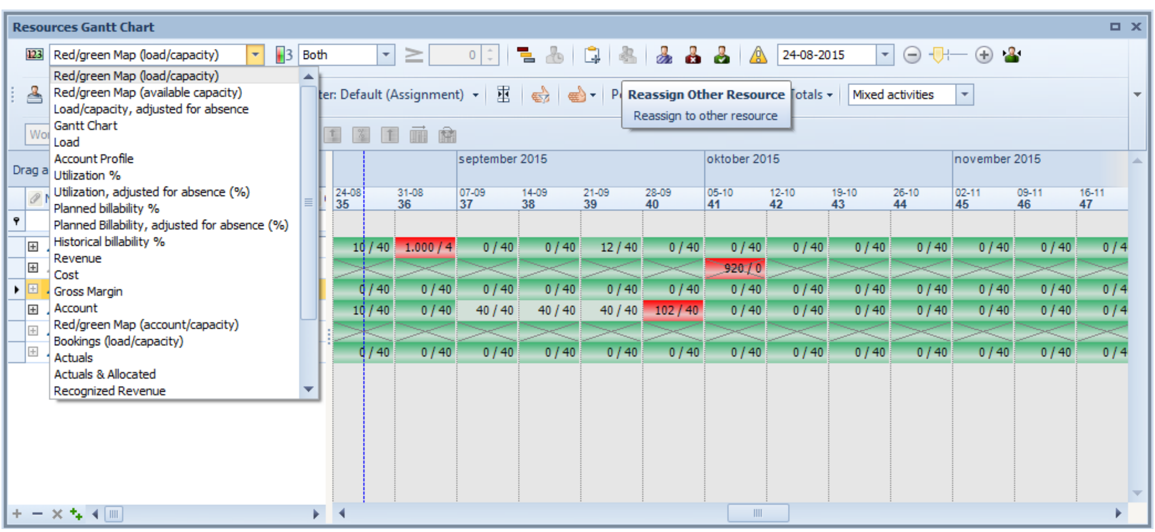
You can see all of the Main Display Views and their settings via **Views » Projects » Main Display View**.



Visible in... Display ...	Name	WBS Su... in Gantt	Aggrega...	Show av... capacity	Show Levels	Grouping Display	Resource Name Fil...	Show Progress
☑	Progress	None	None	Account	All	None	Nothing	☐
☑	Client Planning	None	None	Account	Level 1	None	Nothing	☐
☑	Allocated vs Actuals	All Levels	None	Account	Level 2	None	Nothing	☐
☑	Revenue	None	None	Account	All	None	Nothing	☐
☑	Costs	None	None	Account	All	None	Nothing	☐
☑	Planning	None	None	Account	All	None	Nothing	☐
☑	Allocated	None	None	Account	All	None	Nothing	☐
☑	Allocated vs. Planned	None	None	Account	All	None	Nothing	☐
☑	Gross Margins	None	None	Account	All	None	Nothing	☐
☑	Baseline & Working budg	None	None	Account	All	None	Nothing	☐

Note: You can edit user-specified Main Display Views. However, you **cannot** edit the system Main Display Views.

Main Display Views of the RG



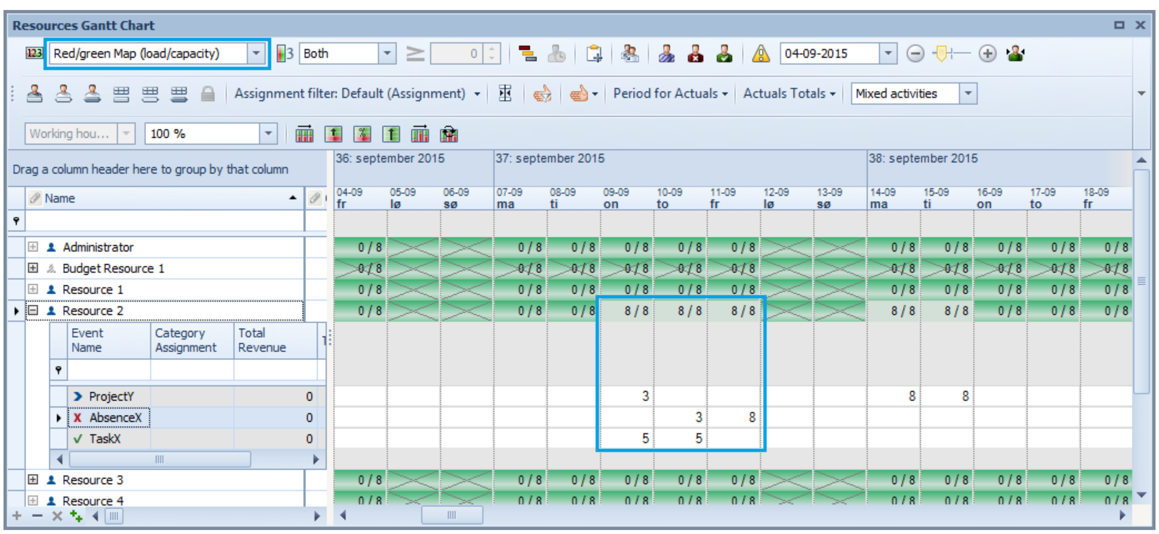
The RG contains the following Main Display Views:

- Red/Green Map (Load/Capacity)
- Red/Green Map (Available Capacity)
- Load/Capacity, Adjusted for Absence

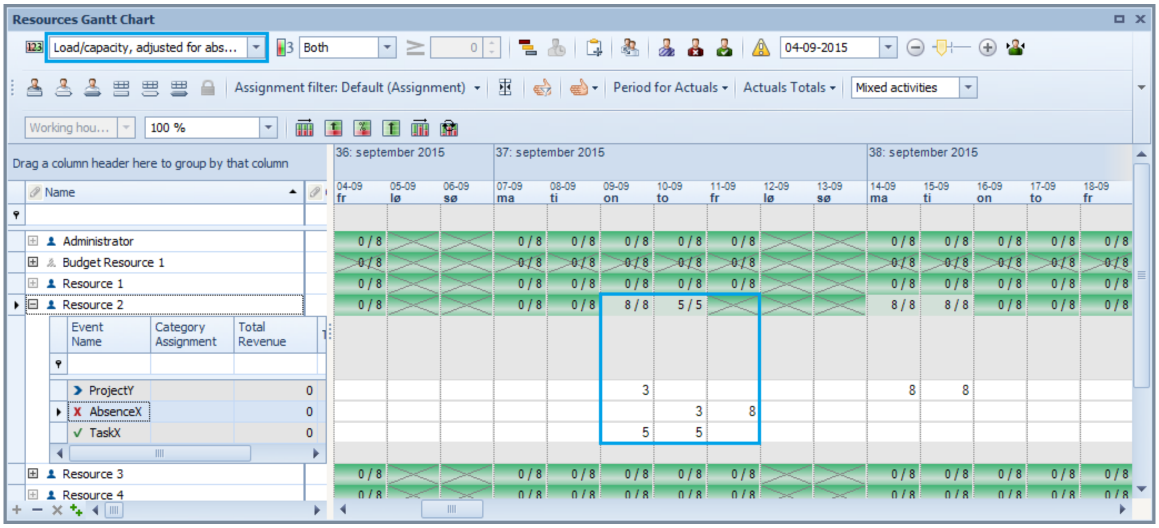
- Gantt Chart
- Load
- Account Profile
- Utilization %
- Utilization, Adjusted for Absence (%)
- Historical Billability %
- Revenue
- Cost
- Gross Margin
- Account
- Red/Green (Account/Capacity)
- Bookings (Load/Capacity)
- Actuals
- Actuals & Allocated
- Recognized Revenue
- Invoiced Revenue
- Absence / Capacity
- Absence
- Variance Actual/Planned

Absence-Adjusted Main Display Views

Bookings on tasks as well as bookings on absence are summed as the load of the resource. The following example shows bookings on absences treated as part of the load.



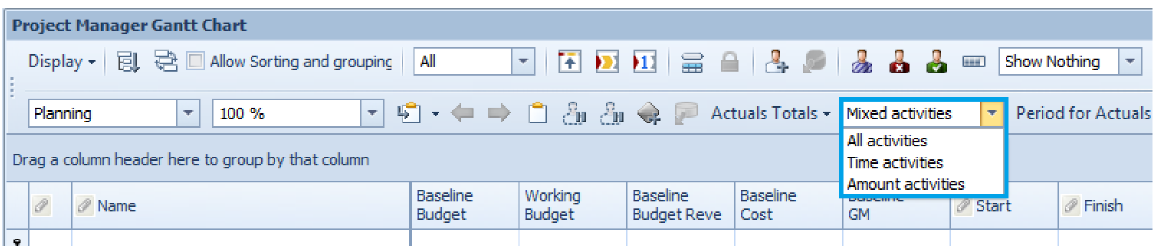
In some situations, it is more appropriate to treat bookings on absences as reduced capacity. The following example shows bookings on absences treated as reduced capacity.



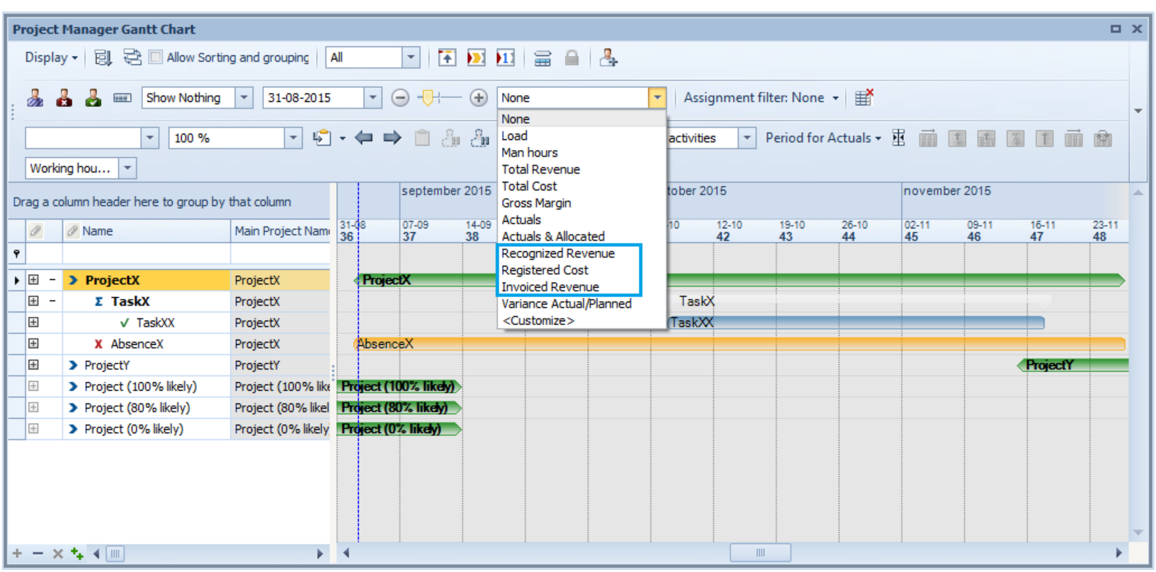
The RG has several pairs of Main Display Views that behave in this way.

Activity Types

The following figure illustrates the **Activity Types** control.

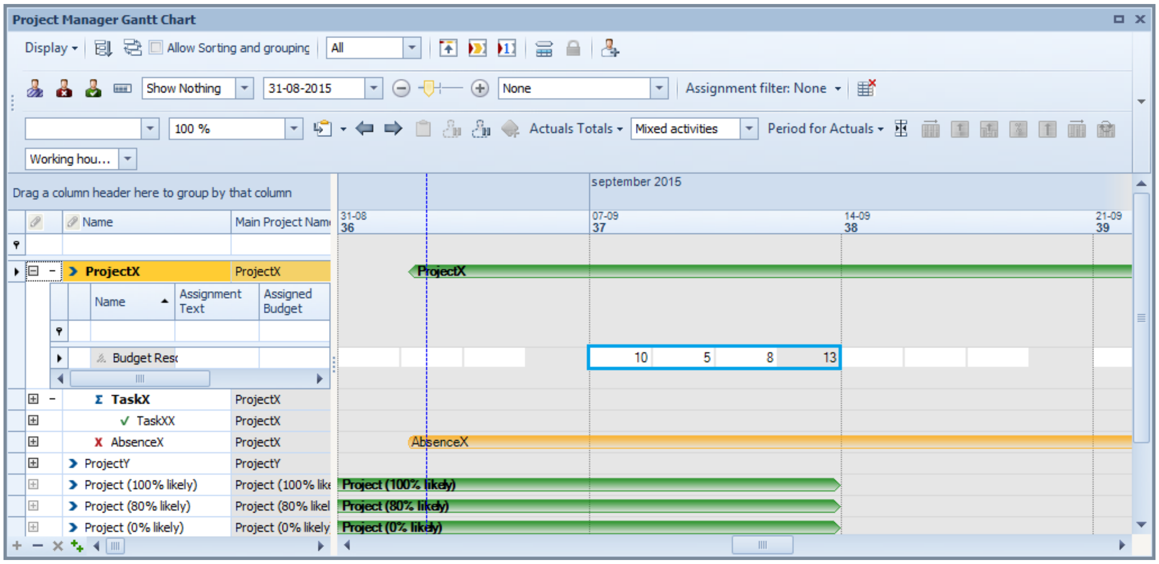


The Activity Types control is only functional when you have selected one of the highlighted items in the Display (Main Display) dropdown that is shown in the following figure. The Activity Types control is not disabled; however, it has no function unless you have selected one of those options.



Each of the display views shows values for a set of three related accounts, and thus the Show Account dropdown is disabled. This example uses the same Registered Cost trio of accounts that is described in Amount and Time Accounts.

The following figure shows the PG configured to show the following accounts, from left to right: Working Hours, Registered Cost (Amount), Registered Cost (Time), and Registered Cost (from left to right).

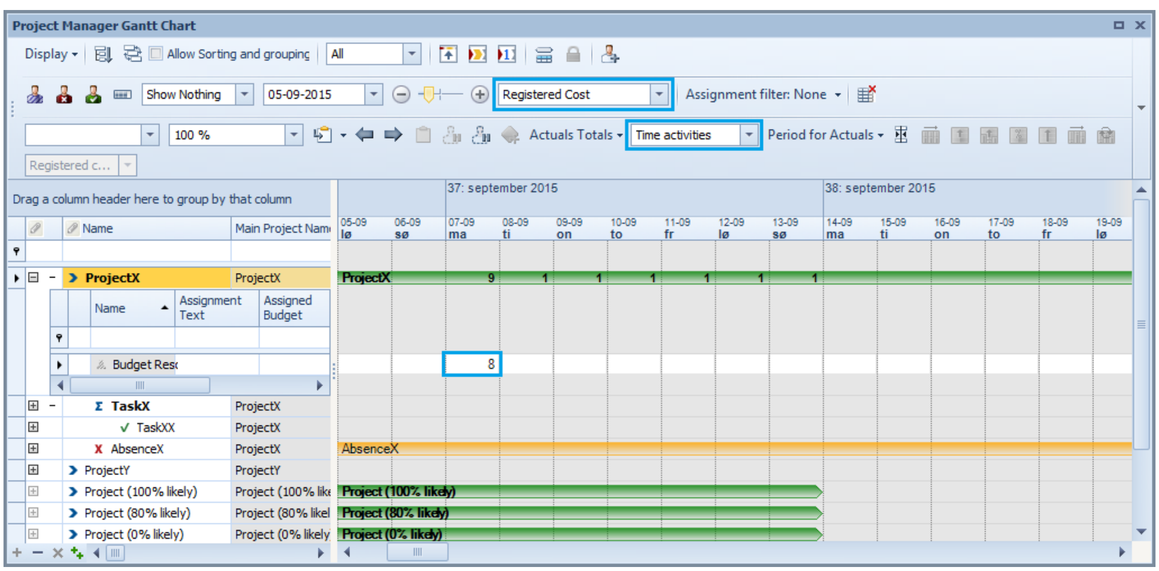


When Display (Main Display) is set to Registered Cost, the PG switches to show one of the accounts Registered Cost (Amount), Registered Cost (Time), or Registered Cost. It is the Activity Types drop-down list that determines which one.

This drop-down list has three possible values:

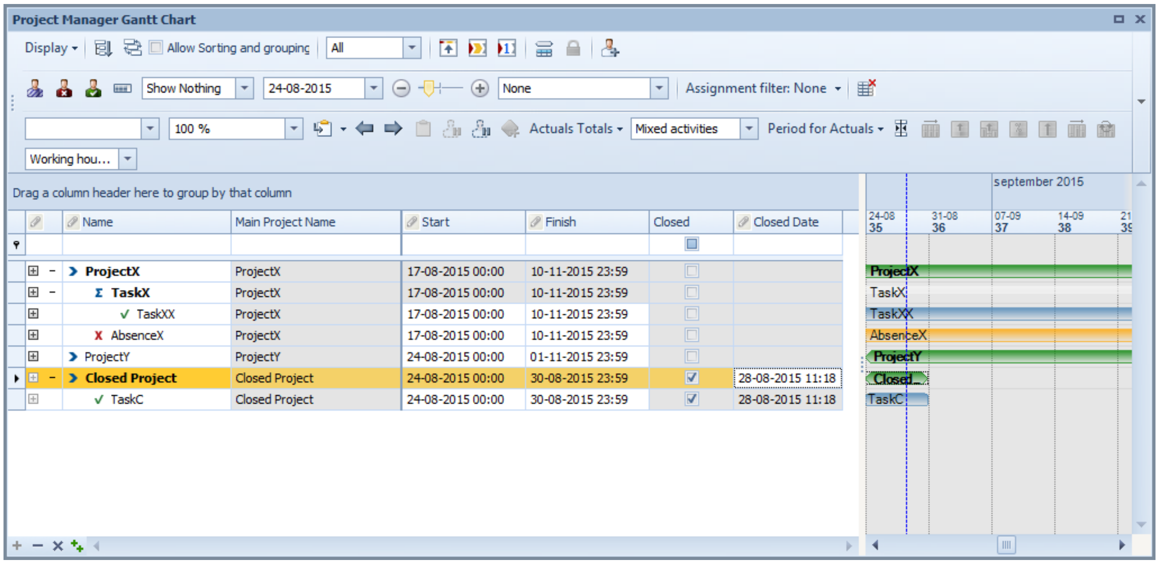
- **All activities** — Show the Registered Cost account.
- **Time activities** — Show the Registered Cost (Time) account.
- **Amount activities** — Show the Registered Cost (Amount) account.

The following example PG shows the Registered Cost (Time) account.



Open and Closed Projects

You can close a project when it is done. By default, closed projects are filtered out in the PG. However, you can set the PG to show closed projects via **Ribbon » View » Show Closed Projects**. In the following example, the PG shows all projects, including closed projects.



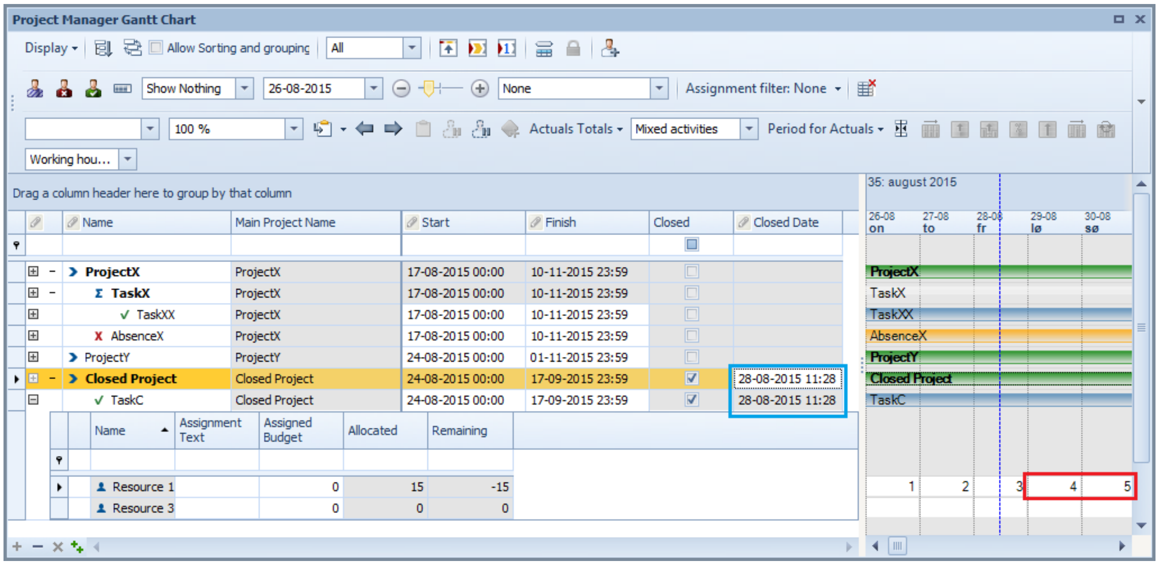
Close or Reopen a Project

To close a project:

1. Select the project in the PG.
2. Click **Ribbon » WBS » Close Projects**.

To reopen a project, use the **Reopen Projects** button instead.

In the following example, the red highlight shows invalid planning according to the closing date of the project, which is shown in blue.



Frequently projects are closed in the ERP system (such as Maconomy), and during project import they are closed in People Planner. When this happens, the Closed Date is set to the time when the project import ran.

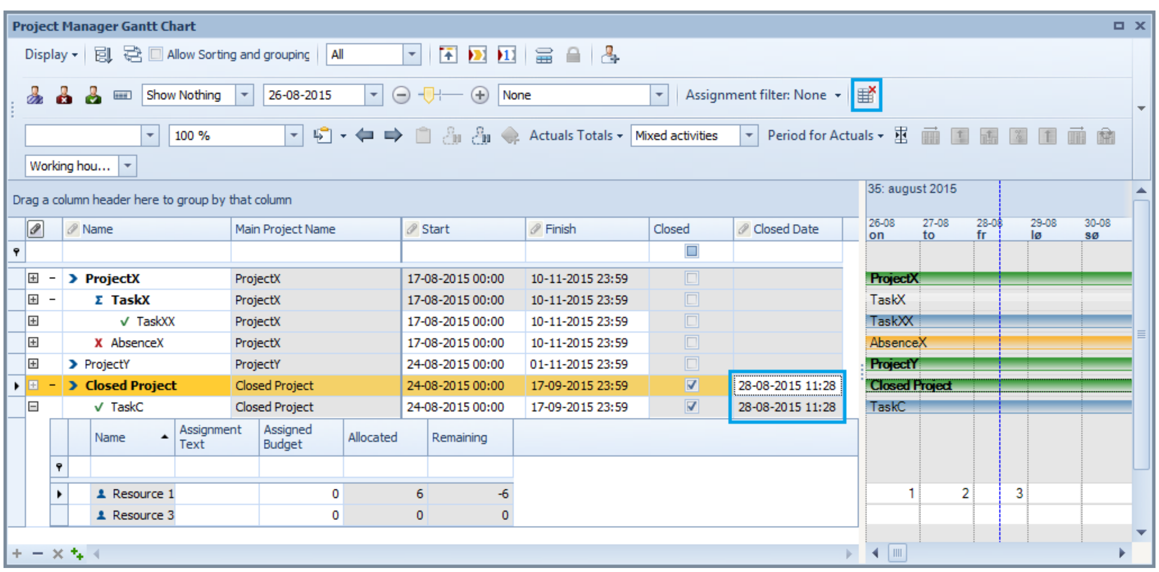
Remove Remaining Planning on a Project

You cannot plan on a closed project; that is, you cannot add new events, assign resources, or book them. However, there might still be remaining planning left on the project at the time it is closed.

To remove remaining planning that is left on the project:

1. Edit the date in the **Closed Date** column to the correct date.
2. Click the **Settle Project** button.

The following example shows that settling the project gets rid of remaining planning after the closing date.



Assign Probability to a Project

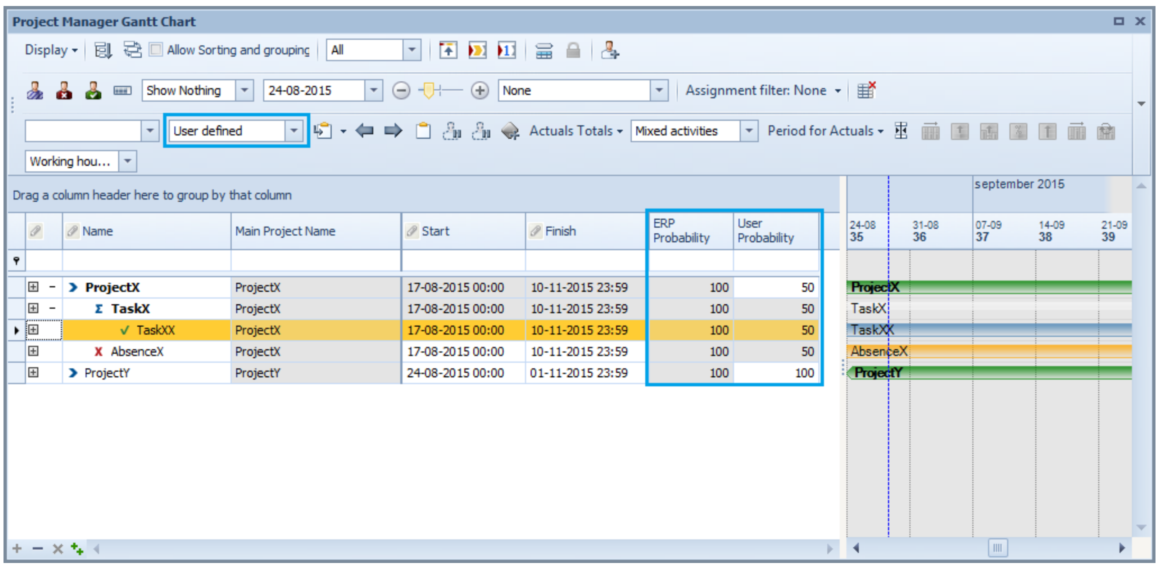
You can use People Planner to plan on projects that have not yet been won. This could be as part of a bidding process.

To support this, you can assign a probability to the project. For example, “80%” would signify that it is 80% likely that you will win the project.

People Planner has two such probabilities:

- **ERP Probability** — This is the value that is imported from an ERP system, such as from Maconomy.
- **User Probability** — Users can set this value to experiment with different scenarios for winning or losing the project.

This probability selection is highlighted by the first blue box in the following example.



The Select Probability Setting dropdown controls how these probabilities are applied to the project. It can have the following values:

- 100 %
- 0 %
- ERP defined
- User defined

If a project is imported from the ERP system, you can only change the ERP probability from there, and the column is read-only in People Planner. If the project is created in People Planner you can edit the ERP probability in People Planner.

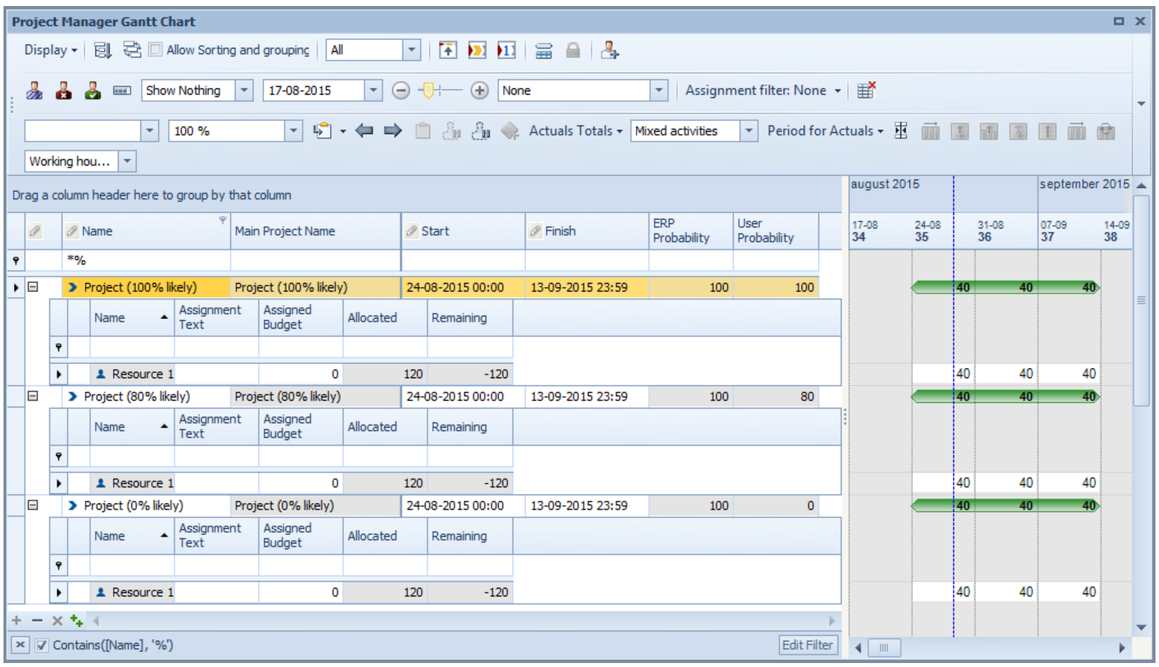
You can always edit the User Probability column from People Planner.

The probabilities can be given a value in the range 0-100. The values are saved in the People Planner database.

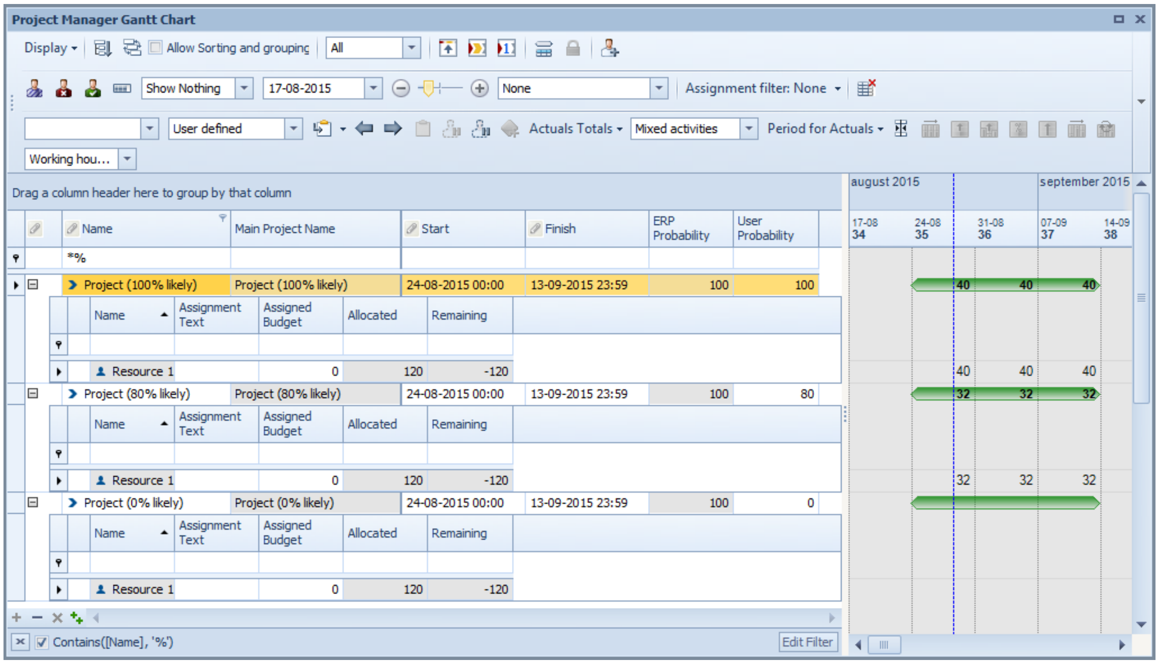
Note: Before People Planner 3.6.1 the User Probability was not saved.

Value	Scenario
100 %	How would the planning look if you win all of the projects?
0 %	How would the planning look if you do not win any of the uncertain projects (user probability < 100%)?
ERP Defined	How would the planning look if the probability from Maconomy were correct?
User Defined	How would the planning look if the user probability were correct?

The following is an example of Select Probability Setting set to 100%, which means that you can make bookings as you normally do.



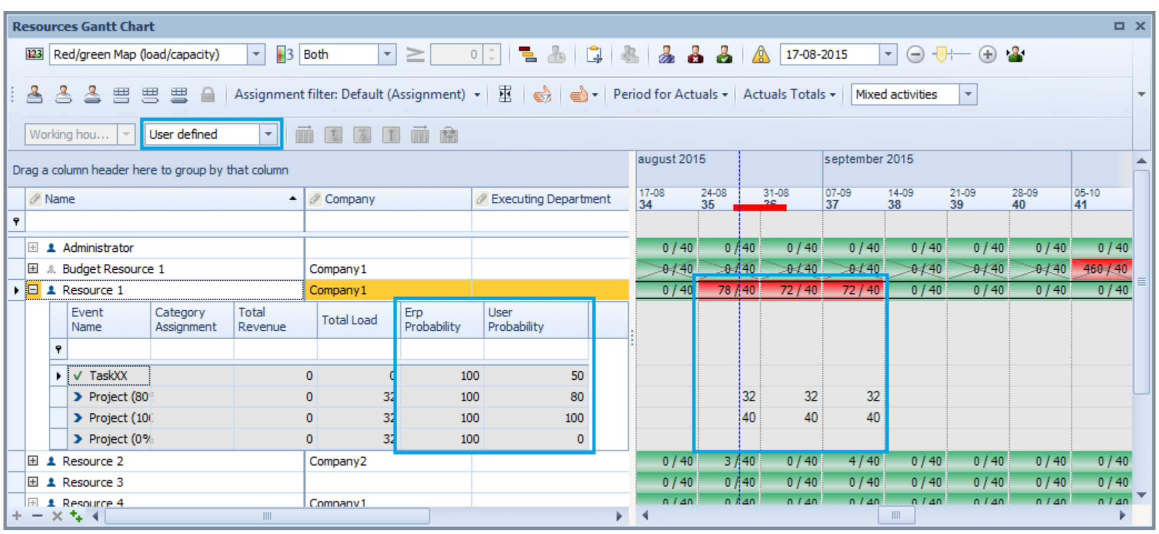
When you set Select Probability Setting to one of the other values, you can no longer make bookings. Instead, the existing bookings are adjusted according to the probability.



The benefit of this is best illustrated by looking at the RG. The load of each resource is weighted according to how likely it is that the project will be won.

By setting values for Select Probability Setting and User Probability, you can estimate whether there is going to be a problem with staffing the project. Setting Select Probability Setting to 0% and 100% is the same as asking for the worst-case and best-case scenarios.

The following example shows that in the RG, the load of the resources is adjusted according to the probabilities.



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