WORKFORCE SCHEDULE

USER MANUAL

Contents

1. Installation

Requirements:

Computer Operation system:

Window Vista

Windows 7

Dot Net Framework 4.0

Database: SQL Server 2000 or later

1.1 Program installation

1.1.1 Network Installation

Create the following directories on one of your network drives:

➢ WorkForceSchedule   – will contain the program and libraries
  ➢ XLS   – will contain the excel files (import models)
  ➢ Styles   – will contain the display styles used within the application

Copy the supplied files to these directories.

Create a link on each user desktop pointing to the WorkforceSchedule.exe program.

1.1.2 TEMP directory

A TEMP directory is needed on each user PC, generally it will be C:\TEMP.

It will be the same for all users.

It will be the same as configured in the **.config** file (see Configuration file, later in this manual)

1.2 Database installation

SQL Server: can be SQL Express, SQL2000 or later.

A medium powerful server will be enough; for disk space, the database will only take a few Gbytes after several years.
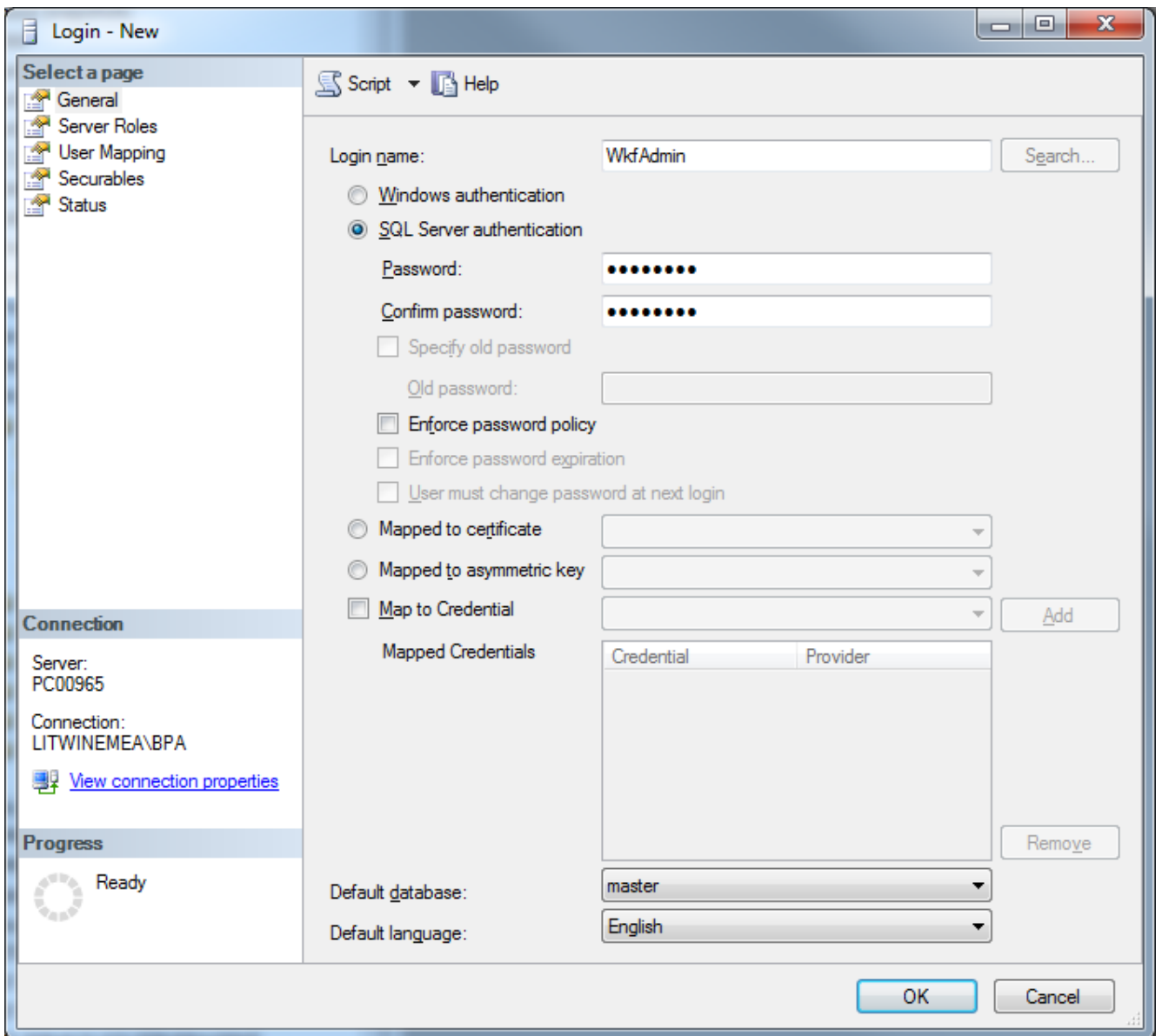
1 - On SQL Server, create a login

User: WkfAdmin

Password: WkfPassw

With:

a) SQL Server authentication
b) No Enforce password policy
c) Default Language: English

2 - On SQL Server, create a database called **WorkForce**

- Compatibility = SQL2000
- Owner = WkfAdmin
- Collation = SQL_Latin1_General_CP1_CI_AS

3 - Use the script WkfCreateDataBase.sql to create the tables and views

4 - For the demonstration data, restore from WkfInitialData.dat to the new created database

1.3   Configuration file

The configuration file's name is WorkForceSchedule.exe.config. Edit it with a text editor (ex; Notepad.exe) and modify the following parameters, where needed:

<add key="TempDirectory" value="c:\TEMP\"/>

   The name of the temp directory on each user's PC

<add key="DatabaseServer" value="SqlServer"/>

   The name of the Sql Server (or IP address)

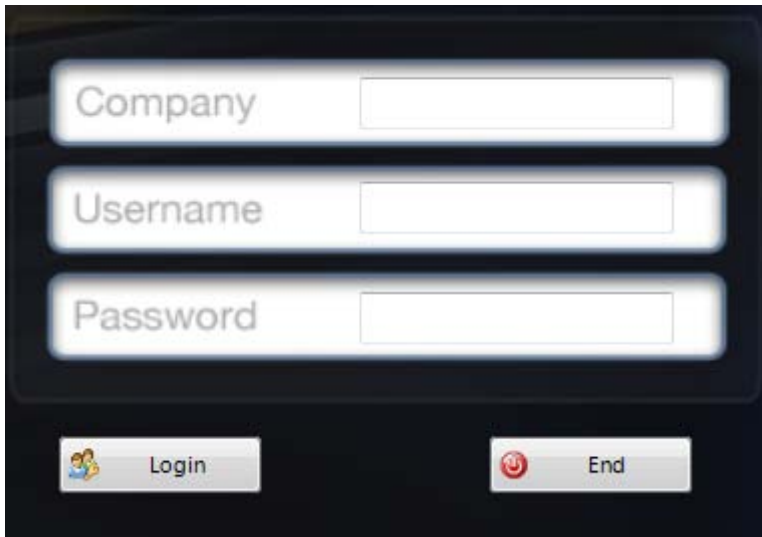<add key="DatabaseCatalog" value="WorkForce"/>

   The Name of the database

<add key="DateFormat" value="dd/MM/yyyy"/>

   The date format (either dd/MM/yyyy or MM/dd/yyyy)

<add key="WeekEndDay1" value="Saturday"/>

   First weekend day (either Saturday or Friday)

2. Getting Started
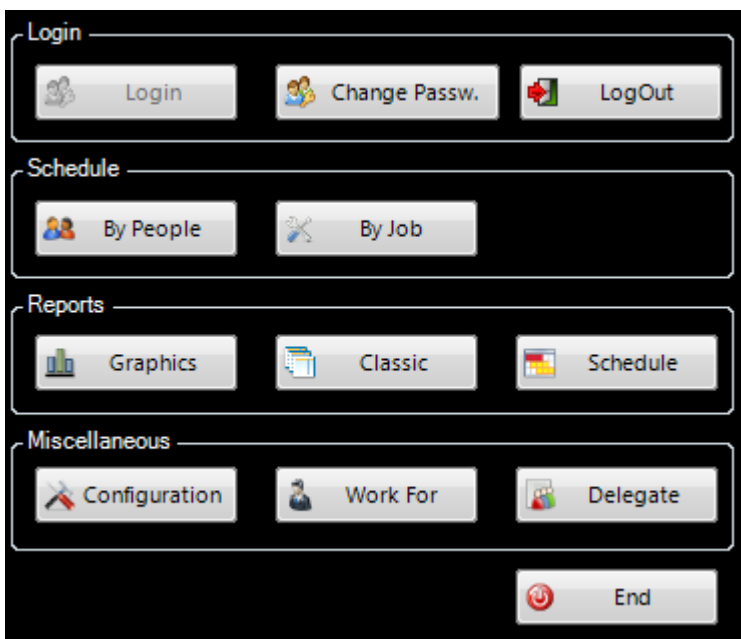
On the first page, enter your login information:

Company: your company number; this is not mandatory, except when there are two or more employees having the same name or number in different companies

Username: first letters of your name or your employee number

Password: your password

The program will verify your login, and if OK, the following controls will be displayed, giving access to the application features. Depending on user access rights, some of the buttons may be hidden, not accessible.
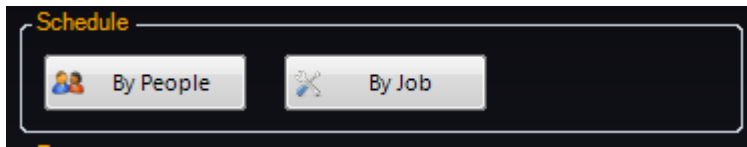

All the program features are described in the next chapters, in this manual.

3. Schedule module

3.1 By People

On the Login form, click on the "By people" button, as shown below:

The following window will be displayed:

3.1.1 Start Date, End Date

Define the Start and End date of the schedule. By default, the Start date is Today, and the End date is 720 days after. Clicking on the "Left" or "Right" buttons will change the date by a month. On the start date, clicking on the "Down" button will bring the Start Date to Today. In the End date, clicking on the "Down" button will change the date to the Start date + 720 days.

3.1.2 Population selection

My People – display people who report to the logged person or to the substitute person (work for another person) – the company list will display only the companies where my people belong

Company – when selected, the company list will display all the companies accessible to the logged person. Check the desired companies, and then click on "Display"; all people belonging to the selected companies will be displayed

Direct – select direct people (productive)

Indirect – select indirect people (administrative, support,…)

Hired – hired people (internal)

External – from an Agency (Contractor) or from another company in your group (Group)

+ Myself – include myself in the list

Needed people – include Needed People (see Needed people, later in this document)

My Managers – list of the managers who report to me. You can display people from one of the managers in this list by checking his name in this list. This way you have access to all people reporting directly to you or reporting to one of your managers, at all levels.

Only with planning - display only people that have a planning

Only with Conflicts - display only people that have planning conflicts

3.1.3   Job Selection

Make your selection and only planning for the selected job types will be displayed. (for ex: if you select only "Vacation" the program will display the Vacation planning.

3.1.4   Add / Remove Jobs to employee planning

Right-click on the employee name, in the employee list; the following panel will be displayed:

On the left side of this panel, you have information about this person, such as his company, manager, department, default task code, hire date, …

On the right side, there is the list of the projects:

To remove a Job from the person list, click on the button corresponding to this job in the "Remove" column.

To add jobs + tasks, click on "Add Job + task" button. The following window will be displayed:

Select the desired jobs by checking the "Select" cell. Select also the task for each job: in the Task Code cell, click on the small button that displays the task list, and then select it in the list, see below:

When the selection is ready, click on the "Add Jobs" button and the selected jobs will be added to the employee schedule, see below:

If the task code is empty, the job will be added with the default task code of the selected person.

You can also add one job at a time to the employee schedule, by clicking on the small button in the "Job Number" cell, as shown below:
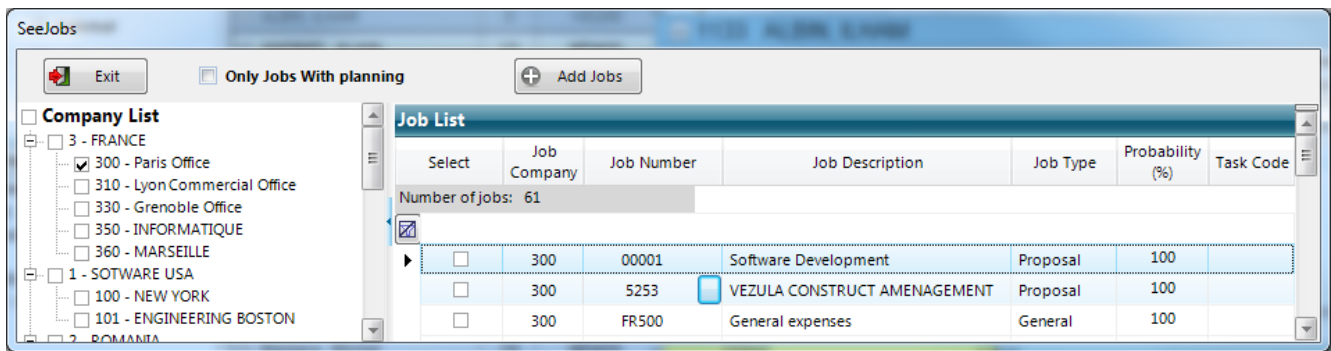
3.1.5 Change task code for a job
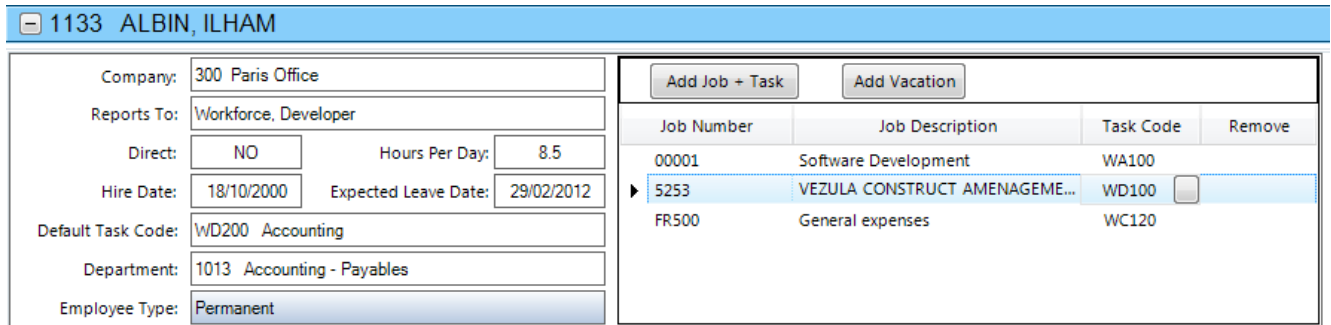
In the Job List for the employee, click on the small button in the "Task Code" cell. The task List will be displayed, as shown below:
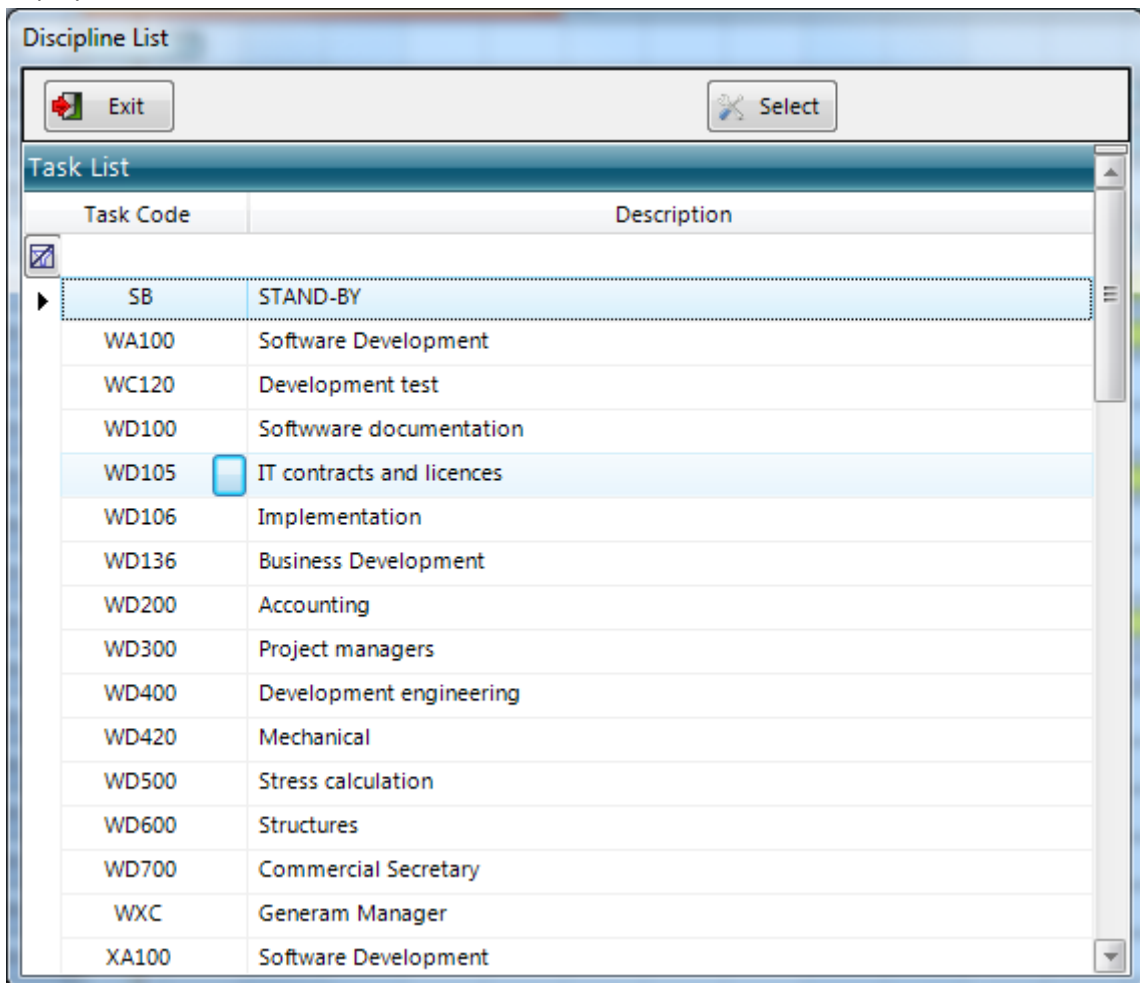
Select the desired task by clicking on the button in the Task Code cell, or double-click on the line.

3.1.6 Add Vacation to employee schedule

Right-click on the employee name, in the employee list; the following panel will be displayed:

Click on "Add Vacation" button and a special job, called "Vacation" will be added to the employee planning. The vacation time bar color will be always light green.

3.1.7 Add time bars

To configure employee planning on jobs, you have to draw time bars on the job line, between two dates.

Note: The time bars on the Employee Line are Read only, they represent a copy at the employee level of all time bars configured at the Job+task level.

To do this, for the desired employee, click on the job line on the cell corresponding to the Start date, keep the button down and drag the mouse to the right, on the same line until you reach the End Date, then release the mouse button. The program will draw a time bar, representing the planning for this employee on this job and task.

The program works by half day planning, see below:

Planning for half a day the 20th of February in the morning.

Planning for half a day the 21st of February in the afternoon.

Planning beginning the 22 of February in the afternoon and ending the 23 of February at the end of the day.

Weekends and office holiday: The program calculates automatically takes into account the weekends and office holidays when a time bar crosses them to calculate the working days, see below:

In this example, although the time bar crosses the weekend, the program calculates only 8 days work on the job and task, corresponding to the working days of this period.

3.1.8 Modify time bars

a) Move a time bar – click on the time bar, keep the mouse button down, and drag the time bar to the left or right, to modify the start and end dates, or up and down (vertical move) to affect the time bar to another Job+Task.

b) Change a time bar length – click on the left or right border of the time bar, keep the mouse button down and then drag the mouse to the left or right to modify the size of the time bar.

c) Delete a time bar – right-click on the time bar, the following menu will appear:
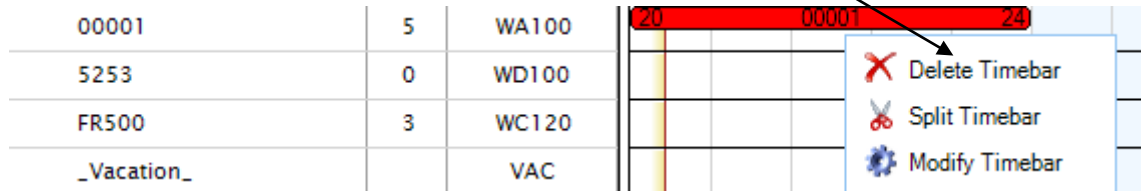
The selected time bar will be colored in red. Click on the "Delete" menu to remove the time bar.

d) Split a time bar – right-click on the time bar, the following menu will appear:
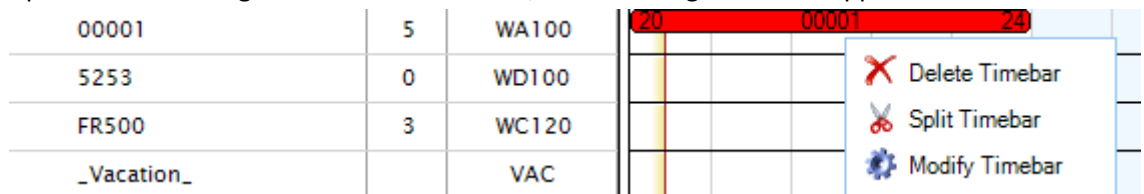
Click on "Split Time bar; the mouse pointer will take the shape of a scissor; click on the time bar at the desired date and the time bar will be split in two.

e) Complex modifications of a time bar: double-click on the time bar, and the following window will appear:
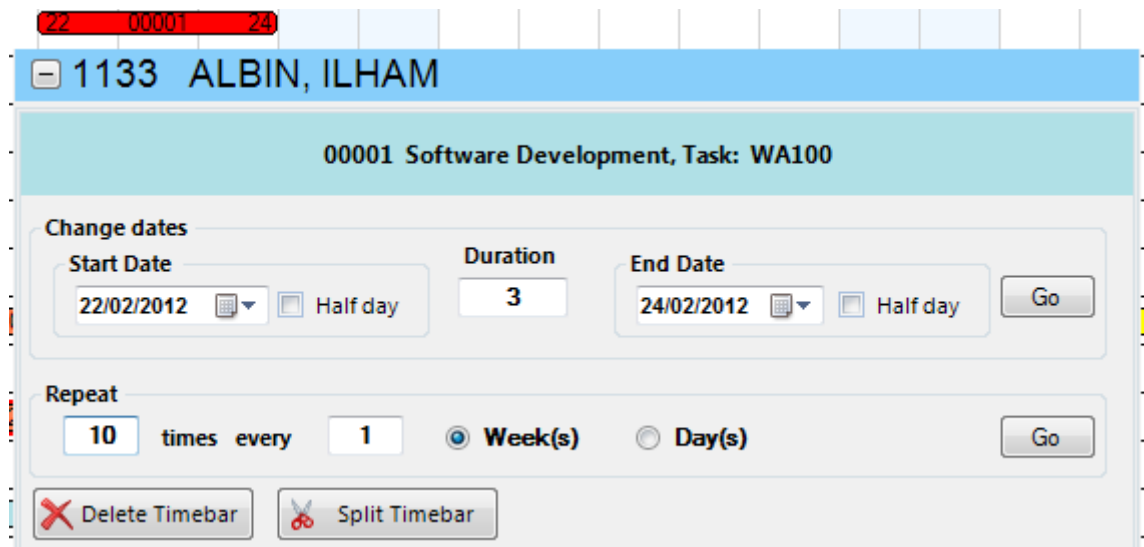
You can change the Start Date, or the End Date or the Duration (in working days) and then click on the corresponding "Go" button; the time bar will be modified accordingly.
Half day: for the Start Date it means that the time bar will begin at mid-day; for the End Date, it means that the time bar will end at mid-day (if checked).

You can "Repeat" the time bar several times (weekly or daily) by filling the textboxes in the "Repeat" panel and then click on the corresponding "Go" panel.

3.1.9 Planning conflicts

If you schedule the same employee on several Job+Tasks for the same period (half day, day, several days), the program will signal the conflict by drawing a red tape around the time bars for the conflict period, see below:

You can select the option "Only with Conflicts" and the program will display only people having conflicts in their planning (two or more jobs or vacation the same period).

3.1.10 Needed people

Sometimes, it can happen to need more people than you have available to work on a job. If this is the case, you can add a special kind of people, called a "NEED". To do this, click on the [⊕ Add Need] button and the following box will appear:

Select the task in the list and then click on the "Add Need with Task Code" button. The "NEED" will be added at the end of the list and you can do planning for him the same way as for a normal employee.

Replace "NEED" by a real employee. Right-click on the "NEED", the following panel will appear:

Click on "Replace Need"; The Employee list will be displayed, and you can select the desired person.

3.1.11 Export Planning to Excel

You can export the planning of your employees to Excel, by clicking on the Excel button. The following file will be generated and displayed:

Employee Planning

Employee Number	Name	Nb. days	21/02/2012 Tue	22/02/2012 Wed	23/02/2012 Thu	24/02/2012 Fri	25/02/2012 Sat	26/02/2012 Sun	27/02/2012 Mon	28/02/2012 Tue	29/02/2012 Wed	01/03/2012 Thu	02/
300-1133	ALBIN, ILHAM	6.5	00001	00001	5253 + 00001	5253							
300-2084	ANDRIES, ALAIN	14	RO200		MT001				MT219				
300-11588	AOSSO, MARIELLE	0											
300-11577	ARBAGIC, BATIR	8.5	T0802 MT20:		T0700		T0700 T0802		T0802				
300-11315	Attira, Minar	3	5253	5253									
300-11569	Ay, Ahmed	9	5253		MT001								
300-11252	BOIJ, SOPHIE	103	RO200						MT212				

The conflict zones will appear in red.

3.2   By job

This is a window where you can see the planning of employees job by job. Enter the job number in the corresponding text box or click on the small button to select it in a list, and then press "Return".

This window displays all the people, from all departments and companies, who are scheduled to work on this job.

It also displays "Vacation" (always in green).

 If you have RW access to an employee (he is your employee or you are an administrator), you can modify the employee planning the same way as described in the previous chapter.

3.2.1   Add people to Job

Click on the "Add people" button to add new people to the selected job. The following form will be displayed:

Make your selection by checking the desired companies and task codes, and then double-click on the person you want to add to the job (or click on the small button in the "Employee Name" cell.

If you want to add a "NEED" to the job, select first the task code, and then click on the button "Add Need To". The program will add a need with the specified task code.

Replace "NEED" by a real employee. Right-click on the "NEED", the following menu will appear:

Click on "Replace Need"; The Employee list will be displayed, and you can select the desired person.

3.2.2   Show other planning

This option will show the other jobs on which the employees are scheduled to work. It is useful to see if there are planning conflicts between the selected job and other jobs.

3.2.3   Display job planning grouped by task code

Use this option if you need to see the job planning grouped by tasks.

3.2.4 Export Planning to Excel

You can export the planning of your employees to Excel, by clicking on the Excel button. The following file will be generated and displayed:

Job Planning for 5253 VEZULA CONSTRUCT AMENAGEMENT

Employee Number	Name	Nb. days	Tue 21/02/2012	Wed 22/02/2012	Thu 23/02/2012	Fri 24/02/2012	Sat 25/02/2012	Sun 26/02/2012	Mon 27/02/2012	Tue 28/02/2012	Wed 29/02/2012	Thu 01/03/2012
			February 2012									March 201
3-1225	PETIT, ANNE	4	5253				◇					
3-1229	ABEILLE, SAMER	4	5253									
300-1133	ALBIN, ILHAM	7	_Vacation_			5253 + _Vacation_	5253					
300-10868	Baut, Leon	29	5253						5253			
300-11003	Asyme, Malain	19	5253									
300-11088	Mous, Claude	1	5253									
300-11107	Mecia, Isabelle	9	5253									
300-11243	Bigo, Jean	4	5253									

The conflict zones will appear in red.

4. Workload calculation

The program uses the following rules to calculate the work time for an employee on a job on a given day (or half day).

- If the employee is planned on only one job for the day, the program will consider one day work on the job
- If the employee is scheduled on 2 or several jobs the same day (or half day)jobs, the program will calculate overcharge
- If the employee is scheduled on vacation and on one or several jobs the same day, vacation has priority, the program will consider 1 day on vacation, 0 work on the jobs
- For weekend and office holidays, the program will consider 0 work on the scheduled jobs
- For "Expected" jobs, with a probability < 100%, the program will take into account this probability. (ex: if an employee is scheduled on a given day on a job at 80% probability, the program will calculate 0.8 day work on that day.)

5. Reports module

Several types of reports are available in this program.

- Classic reports – table form, exportable to excel
- Graphic reports – work load by people type, job type, …
- Schedule reports – employee planning, available employees, …

For each report, you can select the population and job type (where available) to be displayed, as described below:

5.1.1 Population selection

My People – display people who report to the logged person or to the substitute person (work for another person) – the company list will display only the companies where my people belong

Company – when selected, the company list will display all the companies accessible to the logged person. Check the desired companies, and then click on "Display"; all people belonging to the selected companies will be displayed

Direct – select direct people (productive)

Indirect – select indirect people (administrative, support,…)

Hired – hired people (internal)

External – from an Agency (Contractor) or from another company in your group (Group)

+ Myself – include myself in the list

Needed people – include Needed People

My Managers – list of the managers who report to me. You can display people from one of the managers in this list by checking his name in this list. This way you have access to all people reporting directly to you or reporting to one of your managers, at all levels.

Only with planning - display only people that have a planning

Only with Conflicts - display only people that have planning conflicts

5.1.2 Job Type selection
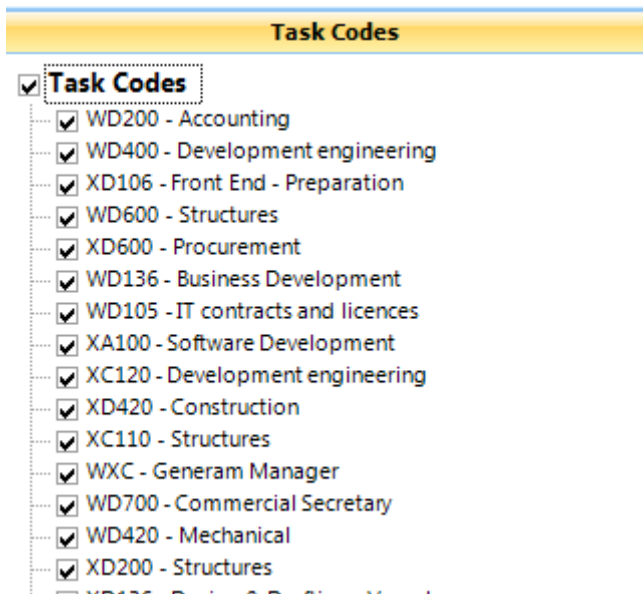
☑ **Job Selection**
- ☑ Contract
- ☑ Proposal
- ☑ General
- ☑ Expected
- ☑ Vacation

Job Number [   ] [☐ Display]

Make your selection by checking the desired job types in this list.

5.1.3 Task Selection
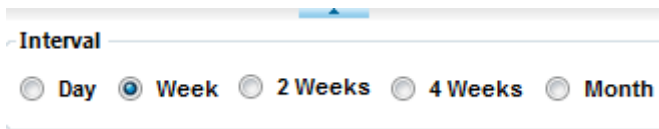
Click on the "Task Codes" (Task Codes) button on the
bottom left of the page, and the select the desired tasks by checking them in the list.

Task Codes

☑ **Task Codes**
- ☑ WD200 - Accounting
- ☑ WD400 - Development engineering
- ☑ XD106 - Front End - Preparation
- ☑ WD600 - Structures
- ☑ XD600 - Procurement
- ☑ WD136 - Business Development
- ☑ WD105 - IT contracts and licences
- ☑ XA100 - Software Development
- ☑ XC120 - Development engineering
- ☑ XD420 - Construction
- ☑ XC110 - Structures
- ☑ WXC - Generam Manager
- ☑ WD700 - Commercial Secretary
- ☑ WD420 - Mechanical
- ☑ XD200 - Structures

5.1.4 Interval selection

Interval

○ Day ◉ Week ○ 2 Weeks ○ 4 Weeks ○ Month

Check the desired interval.

5.2 Classic reports

5.2.1 Employee List

This report shows the list of the selected employees with all employee information.

Company	Employee Number	Employee Name	Employee Type	Date In	Expected Date Out	Gender	Direct	Task Code	Task Description	Department Number	Department Name	Hours Per Day	
		Number of employees: 45					☑						
300	2084	ANDRIES, ALAIN	Contractor	04/01/1988		F	☑	WD400	Development engineering	2010	Software Development	7.5	Workforce, Developer
300	11588	AOSSO, MARIELLE	Group	30/01/2003		M	☑	XD106	Front End - Preparation	1012	Accounting - Receivables	7.5	Workforce, Developer
300	11577	ARBAGIC, BATIR	Permanent	04/12/2002		M	☑	WD600	Structures	1011	Accounting General	8	Workforce, Developer
300	11315	Attira, Minar	Permanent			M	☑	XD600	Procurement	300	Quality Assurance	8	Workforce, Developer
300	11569	Ay, Ahmed	Permanent	18/11/2002		M	☑	WD136	Business Development	100	General management	8	Workforce, Developer
300	11252	BOIJ, SOPHIE	Permanent	01/10/1992			☑	WD105	IT contracts and licences	1012	Accounting - Receivables	8	Workforce, Developer
300	61217	MAWSKI, MICHELE	Permanent	01/10/1999			☑	XC120	Development engineering	2010	Software Development	8	Workforce, Developer
300	11107	Mecia, Isabelle	Permanent			M	☑	XD420	Construction	1011	Accounting General	8	Workforce, Developer

5.2.2 Work Load by people

It shows the work load for each employee, month after month, for a given period. You can see which employee is occupied and how much.

Company	Employee Number	Employee Name	Task Code	Employee Type	Total Time	Work	Vacation	% Busy (15/08/2012)	Total Time	Work	Vacation	% Busy (16/08/2012)	Total Time	Work	Vacation	% Busy (17/08/2012)
		Number Of Employees: 54			54	5	0	9.26 %	54	5	0	9.26 %	54	5	0	9.26 %
=	=	[A]	[A]	[A]	=	=	=	=	=	=	=	=	=	=	=	=
300	1133	ALBIN, ILHAM	WD200	Permanent	1	1	0	100 %	1	1	0	100 %	1	1	0	100 %
300	2084	ANDRIES, ALAIN	WD400	Contractor	1	1.5	0	150 %	1	1.5	0	150 %	1	1.5	0	150 %
300	11588	AOSSO, MARIELLE	XD106	Group	1	0.5	0	50 %	1	0.5	0	50 %	1	0.5	0	50 %
300	11577	ARBAGIC, BATIR	WD600	Permanent	1	0	0	0 %	1	0	0	0 %	1	0	0	0 %
300	11315	Attira, Minar	XD600	Permanent	1	0	0	0 %	1	0	0	0 %	1	0	0	0 %

5.2.3 Work Load by People Task Code

It shows the work load by discipline.

Task Code	Task Description	Month Time 03 2012	Work Time 03 2012	Vacation 03 2012	Percent Busy 03 2012 (%)	Month Time 04 2012	Work Time 04 2012	Vacation 04 2012	Percent Busy 04 2012 (%)	Month Time 05 2012	Work Time 05 2012	Vacation 05 2012	Percent Busy 05 2012 (%)	Month T 06 20
	Number of Tasks: 25	1 166	91	2	7.94 %	1 113	48	0	4.27 %	1 166	36	0	3.09 %	1 11
WD200	Accounting	66	10	0	15 %	63	4	0	6 %	66	0	0	0 %	63
WD400	Development engineering	88	20.5	0	23 %	84	1.5	0	2 %	88	0	0	0 %	84
XD106	Front End - Preparation	88	19	0	22 %	84	21	0	25 %	88	14	0	16 %	84
WD600	Structures	44	2	0	5 %	42	0	0	0 %	44	0	0	0 %	42
XD600	Procurement	22	0	0	0 %	21	0	0	0 %	22	0	0	0 %	21
WD136	Business Development	44	2	0	5 %	42	0	0	0 %	44	0	0	0 %	42
WD105	IT contracts and licences	22	22	0	100 %	21	21	0	100 %	22	22	0	100 %	21
XA100	Software Development	66	0	0	0 %	63	0	0	0 %	66	0	0	0 %	63

5.2.4 Work Load by Job

It displays the list of jobs, with the scheduled work time, month by month, for each job.

Job Company	Job Number	Job Description	Job Type	Work Time 03 2012	Work Time 04 2012	Work Time 05 2012	Work Time 06 2012	Work Time 07 2012	Work Time 08 2012
		Number of Jobs: 11		98	48	36	21	10	0
300	5253	VEZULA CONSTRUCT AMENAGEMEN	Proposal	41	21	14	0	0	0
300	FR500	General expenses	General	9.5	0	0	0	0	0
300	00001	Software Development	Proposal	2	0	0	0	0	0
300	Ex4011	Soft implementation Canada	Expected	5.6	0	0	0	0	0
300	_Vacation	Vacation	VAC	7	0	0	0	0	0

5.2.5 Work Load by Job Type with people details

Same thing as the previous report, but with the people scheduled on each job.

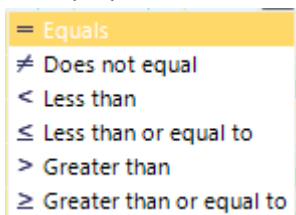| Job Company	Job Number	Job Description	Job Type	Employee Name	Work Time 03 2012	Work Time 04 2012	Work Time 05 2012	Work Time 06 2012	Work Time 07 2012	Work Time 08 2012	Work Time 09 2012
		Number of Lines: 22			98	48	36	21	10	0	0
300	5253	VEZULA CONSTRUCT AMENAGEME	Proposal	Mecia, Isabelle	2	0	0	0	0	0	0
300				Miller, Jean	2	0	0	0	0	0	0
300				Merlouci, Jean	17	21	14	0	0	0	0
300				Memere, Michel	14	0	0	0	0	0	0
300				MORTE, CHRISTINE	6	0	0	0	0	0	0
300	FR500	General expenses	General	Mous, Claude	2	0	0	0	0	0	0
300				Misere, Genevieve	1.5	0	0	0	0	0	0
300				Minaret, Yves	2	0	0	0	0	0	0
300				Merlouci, Jean	2	0	0	0	0	0	0
300				MORTE, CHRISTINE	2	0	0	0	0	0	0
300	00001	Software Development	Proposal	MIETTE, CHRISTINE	2	0	0	0	0	0	0
300	Ex4011	Soft implementation Canada	Expected	MUTRIAL, BERNARD	5.6	0	0	0	0	0	0
300	_Vacation	Vacation	VAC	ANDRIES, ALAIN	5	0	0	0	0	0	0
300				Moato, Gigi	2	0	0	0	0	0	0

Utilization of the filter bar with the reports:

All the reports contain a filter bar, that allows the selection of elements from the report, following your need:

Company	Employee Number	Employee Name	Task Code	Employee Type	Total Time	Work	Vacation	% Busy	Total Time	Work	Vacation	% Busy	Total Time
		Employee			14/05/2012-20/05/2012				21/05/2012-27/05/2012				
		Number Of Employees: 54			270	60.5	2.5	23.33 %	270	47.5	4	19.07 %	270
300	1133	ALBIN, ILHAM	WD200	Permanent	5	0	0	0 %	5	2.5	0	50 %	5
300	2084	ANDRIES, ALAIN	WD400	Contractor	5	5	0	100 %	5	5	0	100 %	5
300	11588	AOSSO, MARIELLE	XD106	Group	5	0	0	0 %	5	0	0	0 %	5
300	11577	ARBAGIC, BATIR	WD600	Permanent	5	2	2.5	90 %	5	0	4	80 %	5
300	11315	Attira, Minar	XD600	Permanent	5	5	0	100 %	5	0	0	0 %	5

For example, if you want to know the personnel who is under-loaded (for ex. less than 90%) during one period:

- in the column "% Busy" of the period, on the filter cell, click on the left button. The folowing menu will be displayed:

```
= Equals
≠ Does not equal
< Less than
≤ Less than or equal to
> Greater than
≥ Greater than or equal to
```

- select "Less than" or "Less than or equal", and then type 90 in the filter cell; the result will be diaplayed immediately:

Company	Employee Number	Employee Name	Task Code	Employee Type	Total Time	Work	Vacation	% Busy	Total Time	Work
		Employee			14/05/2012-20/05/2012				21/05/201	
		Number Of Employees: 45			225	15.5	2.5	8 %	225	12.5
300	11577	ARBAGIC, BATIR	WD600	Permanent	5	2	2.5	90 %	5	0
300	11239	Barbe, Bleu	XD500	Permanent	5	0	0	0 %	5	0
300	61217	MAWSKI, MICHELE	XC120	Permanent	5	1.5	0	30 %	5	3.5
300	11107	Mecia, Isabelle	XD420	Permanent	5	3.5	0	70 %	5	1.5
300	11572	Memere, Michel	WD400	Permanent	5	0	0	0 %	5	0

- you can combine several filters, following your need, here are some examples:

- under loaded personnel under 100% the first period and under 90% the second period:

Company	Employee Number	Employee Name	Task Code	Employee Type	Total Time	Work	Vacation	% Busy	Total Time	Work	Vacation	% Busy	Total Time
		Employee					14/05/2012-20/05/2012				21/05/2012-27/05/2012		
		Number Of Employees: 44			220	11	2.5	6.14 %	220	7.5	4	5.23 %	220
=	=	A	A	A	=	=	=	< 100	=	=	=	≤ 90 ▼	=
300	11588	AOSSO, MARIELLE	XD106	Group	5	0	0	0 %	5	0	0	0 %	5
300	11577	ARBAGIC, BATIR	WD600	Permanent	5	2	2.5	90 %	5	0	4	80 %	5
300	11239	Barbe, Bleu	XD500	Permanent	5	0	0	0 %	5	0	0	0 %	5
300	61217	MAWSKI, MICHELE	XC120	Permanent	5	1.5	0	30 %	5	3.5	0	70 %	5
300	11107	Mecia, Isabelle	XD420	Permanent	5	3.5	0	70 %	5	1.5	0	30 %	5
300	11572	Memere, Michel	WD400	Permanent	5	0	0	0 %	5	0	0	0 %	5

- under loaded "Contractor" personnel (external) under 100% the first period:

Company	Employee Number	Employee Name	Task Code	Employee Type	Total Time	Work	Vacation	% Busy	Total Time	Work
		Employee					14/05/2012-20/05/2012			21/05/2
		Number Of Employees: 25			125	0	0	0 %	125	0
=	=	A	A	A	Contractor	=	=	=	< 100 ▼	=	=
3	701636	BATT, NATHALIE	XD400	Contractor	5	0	0	0 %	5	0
300	11661	BLAU, OLIVe	XD300	Contractor	5	0	0	0 %	5	0
3	701540	BOURY, CED	XD105	Contractor	5	0	0	0 %	5	0
330	701632	CHOQUE, LOLO	WXC	Contractor	5	0	0	0 %	5	0

5.3   Graphic reports

For each graphic report, you can select the Start date and End date and the graphic interval:

The default interval is "Week".

The Options:

By checking / un-checking one of the option, the corresponding graphic will be displayed or not.

5.3.1   Graphic by people type

It shows the work load by category of employee (Internal, External, Group). The vacation time is always in green and on the top of the graphic columns.
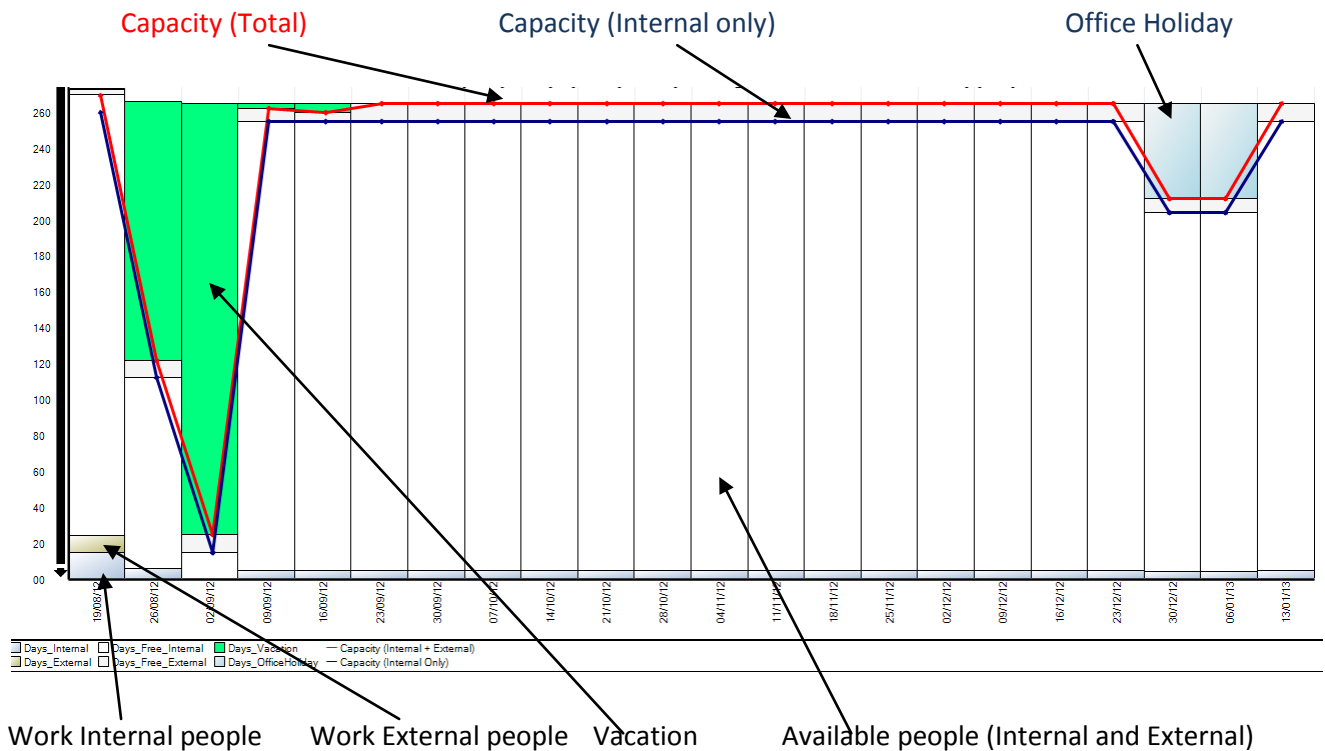
The graphic is interactive; you can click on one of the colored areas and the program will display the people and the number of days corresponding to that area.

For example, if you click on the blue area (Internal people) in the second column, the program will display the list of internal people with work schedule in the week corresponding to this column, see below:

Clicking on the small button in the "Employee Name" cell will bring the schedule for the selected employee, and you can modify his planning, see below:
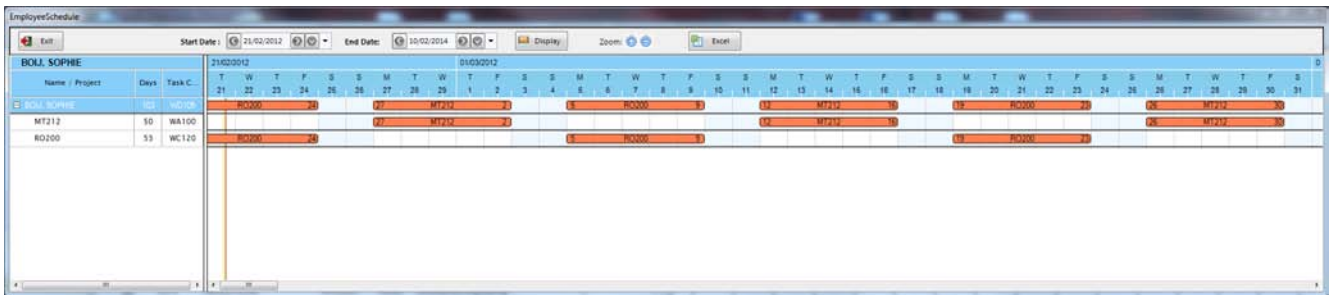
If you click on the white area (Available people) of the graphic, the program will display the list of employees without any planning for the selected period.

5.3.2 Graphic by Job Type

This graphic will show the workload by type of jobs (how much on Contract, proposal, General, Expected and Vacation). It is useful to see the weight of each Job Type on the total workload.
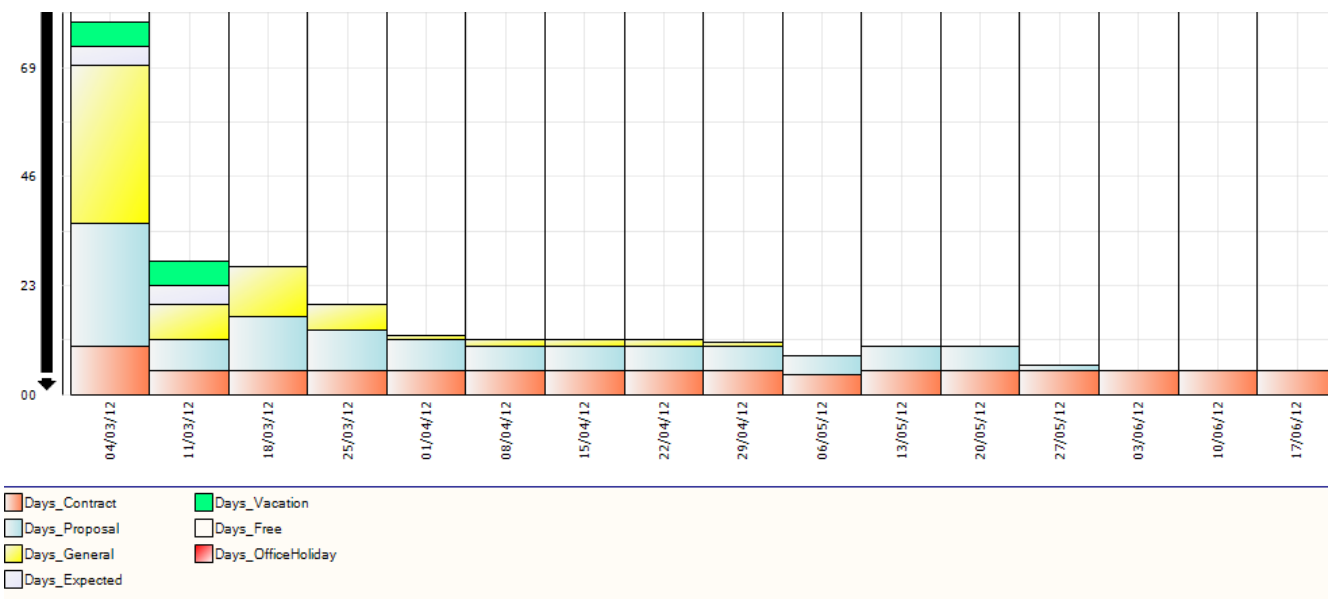
The graphic is interactive, so if you click for example on the blue area (Proposal), the program will display the list of all people working on proposals for the selected period.

5.3.3   Graphic by Job Number

It shows the workload with job details, where you can see the weight of each job in the total workload.

300-MT001	300-MT205	300-MT212	300-Ex4021
300-MT219	300-T0700	300-MT002	Days_Vacation
300-RO200	300-T0802	300-00001	Days_Free
300-FR500	300-5253	300-Ex4011	Days_OfficeHoliday
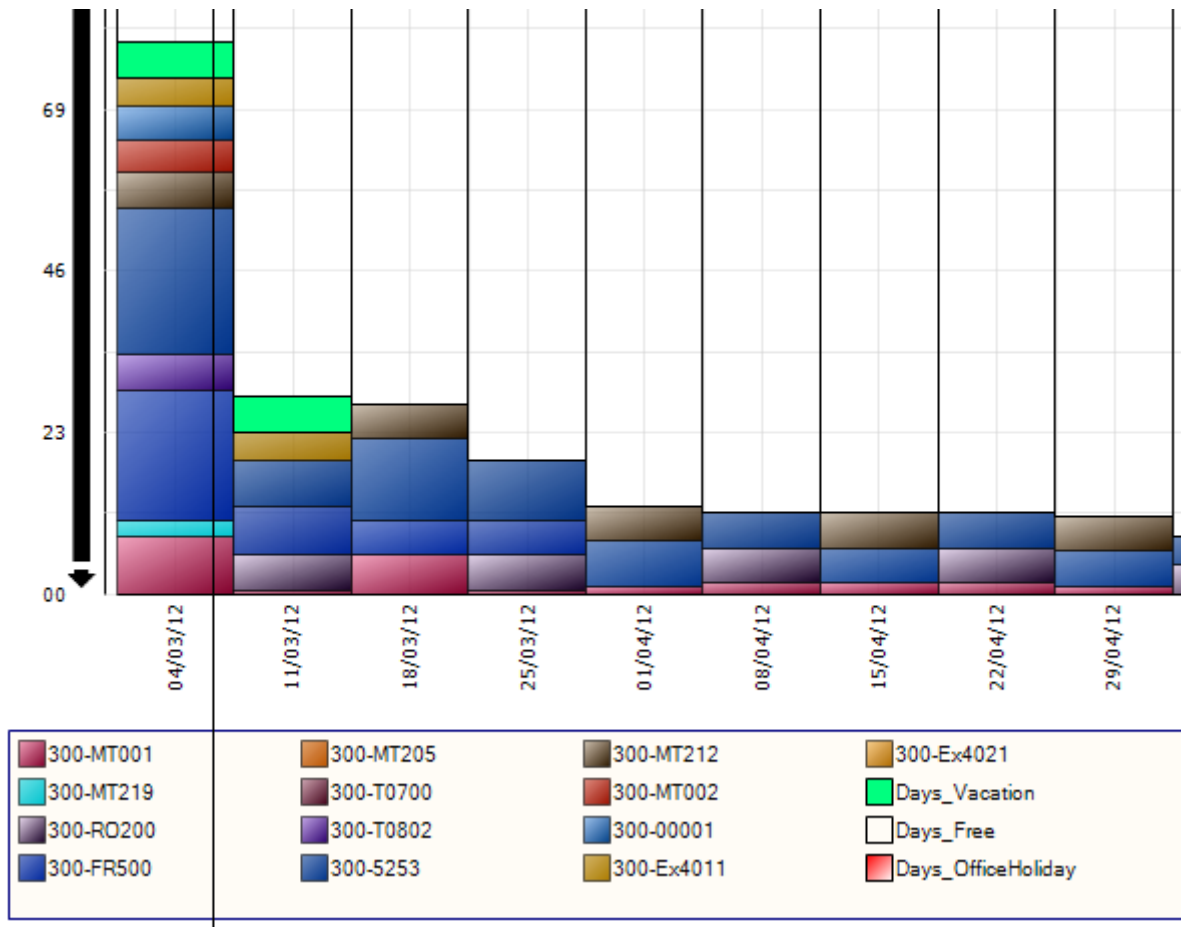
5.3.4   Graphic by Task Code (people task code or job task)

It shows the graphic by task code, and you can see the weight of each task code on the total workload.

XD105-STUDIES COORDINATION	XD200-Structures	WA100-Software Development	-	Days_OfficeHoliday
WD136-Business Development	XA100-Software Development	WC120-Development test	XD136-Design & Drafting - Vessels	
WD106-Implementation	XC110-Structures	XD100-Design & Drafting	Days_Vacation	
WD500-Stress calculation	WXC-Generam Manager	XD420-Construction	Days_Free	
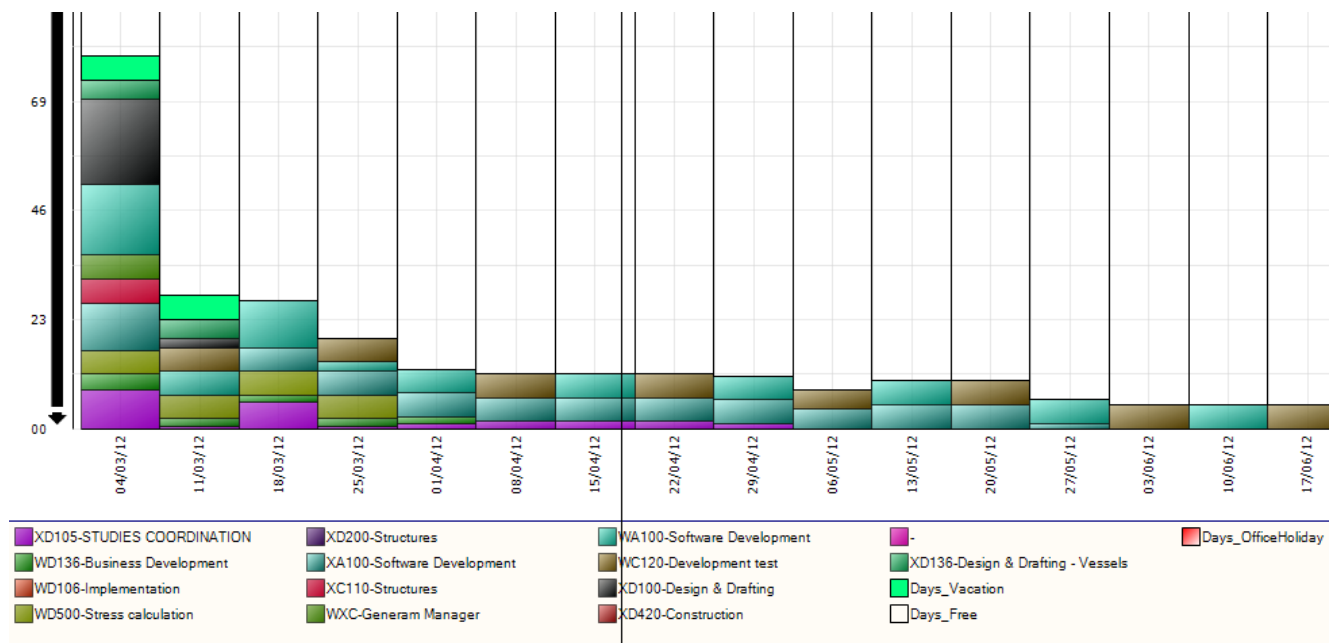
5.4   Schedule reports

5.4.1   Workload by people

It shows the workload in schedule form.

One useful option is to find what people with certain discipline are available for a number of days in a given period. To do this, check the "Available people" option, tell the period and the number of days, select the desired disciplines (tasks), and then hit "Display" button.

Options:
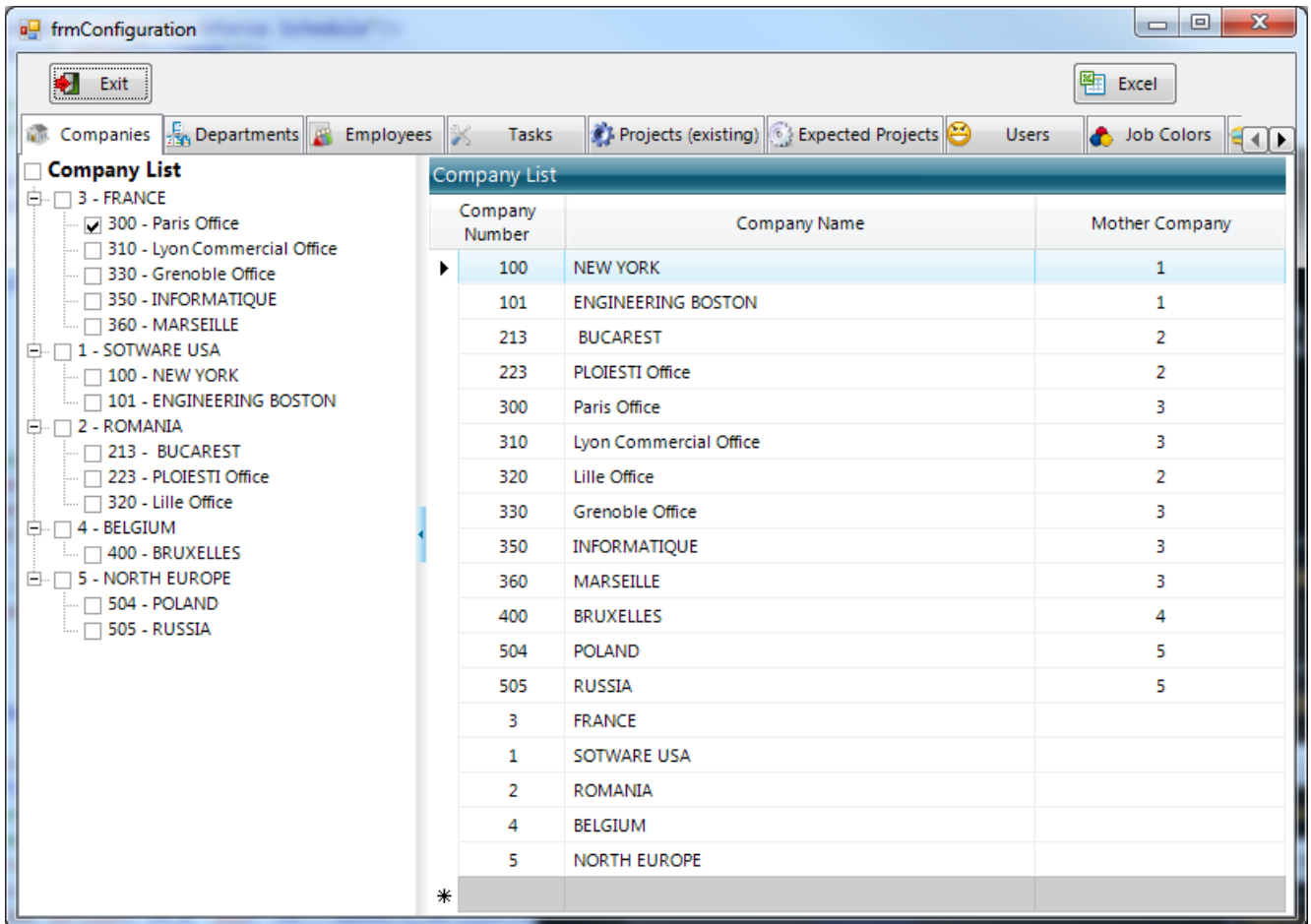
- Only with planning: display only people with a planning corresponding to the selected options
- Only with conflicts - display only people having conflicts in their planning (two or more jobs or vacation in the same period)
- Available people (n Days from date to date) - display people without a planning for n days in the selected period

5.4.2   Workload by task code

Same report, grouped by task code.

6. Configuration module

6.1 Company List

Enter here the list of companies belonging to your group. At least one company must be configured here, your own company.

To enter a new company, use the last row.

To modify a company data, type the new data on the company line, and then click on another line. The data will be saved automatically.

To delete a company, select the company line by clicking on the row header, then hit "Delete". If a company has departments or employees, you cannot delete it.

The following information must be entered:

        f)   Company Code

        g)   Company name

        h)   Mother company (the code of the owner company)

6.2   Department List
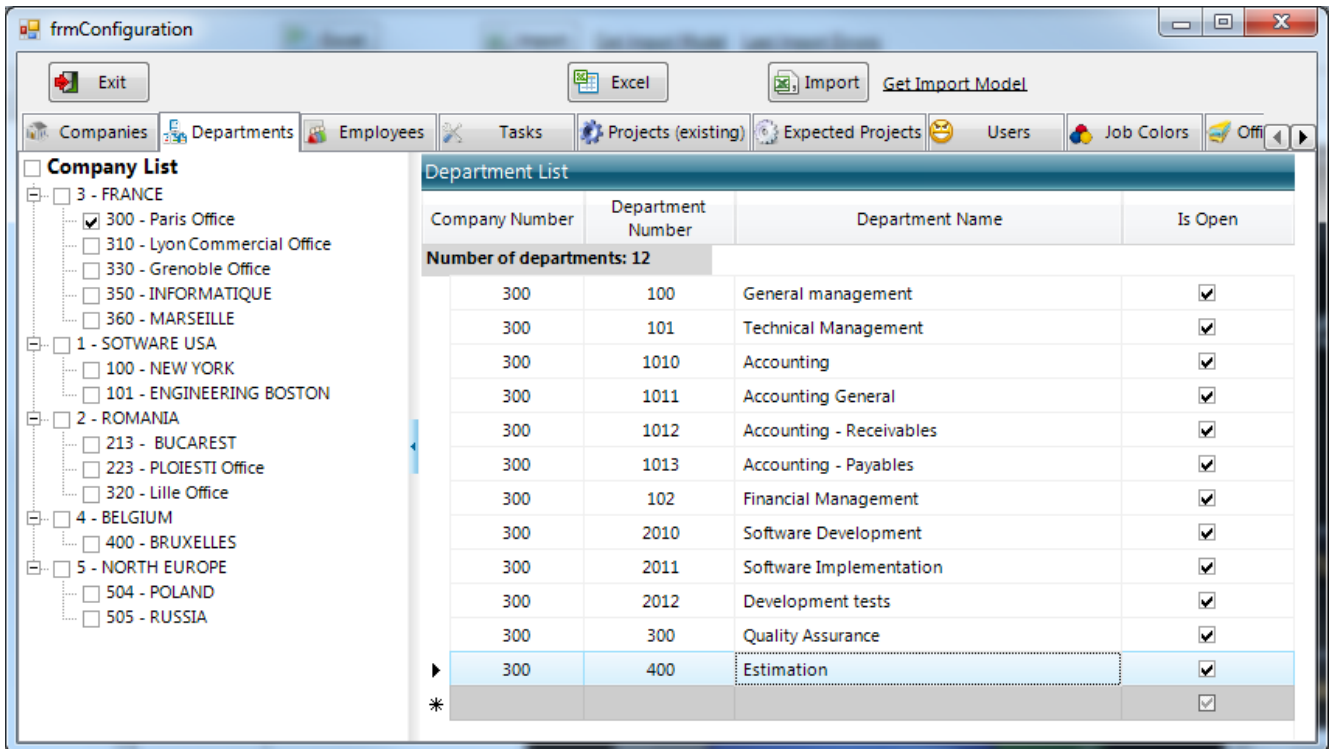
This is the list of the administrative departments for each company in your group. It should reflect the Organization Chart of the company.

This table contains the following data:

i) Company Code – you can click on the small button within this cell to display the company list and then select it in this list, see below:
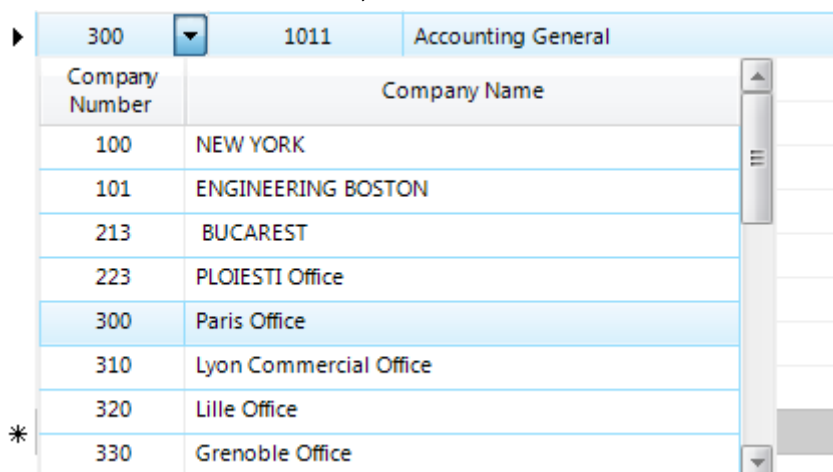
j) Department code

k) Department Name

l) Is Open (Yes/ No) – if the department still exists or no

You can select companies in the left panel by clicking in the company checkbox. The program will display all departments belonging to the selected companies.

To enter a new department, use the last row.

To modify a department data, type the new data on the department line, and then click on another line. The data will be saved automatically.

To delete a department, select the department line by clicking on the row header, then hit "Delete". If a department has employees, you cannot delete it.

Import departments – you can import departments from an excel file. An import model is provided; you can access it by clicking on the "Get Import Model" link.

6.3   Employee List

This is the list of all employees of your group. For each employee, the following information is needed:

m) Company Number – the company the employee belongs to. You can click on the small button within this cell to display the company list and then select it in this list, see below:

n) Employee Number

o) Employee Name

p) Employee type – can be one of three values
- o   Permanent – hired by the company
- o   Contractor – external, from an agency
- o   Group – external to the company, coming from another company in the group

q) Direct / Indirect

r) In Planning – this person will appear in the planning list or not

s) Employee Task Code – the default task code (discipline) for this employee

t) Department Number. you can click on the small button within this cell to display the department list and then select it in this list, see below:

u) Date In – hire date for permanent employees, arrival date for external people

v) Expected Date Out – usually empty for hired employees, or the Contract End Date for external people

w) Manager Company, Manager Number, Manager name – the manager for this employee

x) Gender – should be M (male) or F (Female)

y) Present – if the employee is present or not – when an employee leaves the company, uncheck this cell to say this employee is not present any more. The information will be kept in the database.

z) Hours Per day – the number of work hours per day for each employee

To enter a new employee, use the last row.

To modify an employee data, type the new data on the employee line, and then click on another line. The data will be saved automatically.

To delete an employee, select the employee line by clicking on the row header, then hit "Delete".

Import employees – you can import employees from an excel file. An import model is provided; you can access it by clicking on the "Get Import Model" link.

6.4   Task List

This is the list of the task codes (disciplines) used in your group. The list contains the following data:

aa) Task Code

bb) Description

cc) Valid (Yes / No) – the code is still used or not

Import tasks – you can import tasks from an excel file. An import model is provided; you can access it by clicking on the "Get Import Model" link.

6.5   Projects (existing)

This is the list of the projects in your group of companies. The data for each project is the following:

dd) Job Company – the company where the project belongs

ee) Job Number

ff) Job description

gg) Job Type – should be one of the following 3 types:

- o   Contract – signed, billable
- o   Proposal - offer
- o   General – an internal project

hh) Job Type – always 'Expected'

ii) Client Name

jj) Is Open – the job is open or closed

Import projects – you can import projects from an excel file. An import model is provided; you can access it by clicking on the "Get Import Model" link.

6.6   Projects (expected)

These are projects that the company has good hope to win. The data for each project is:

kk) Job Company

ll) Job Number

mm)   Job Description

nn) Project Manager

oo) Job probability – the estimated probability to win the contract

pp) Comments

6.7   Office holidays
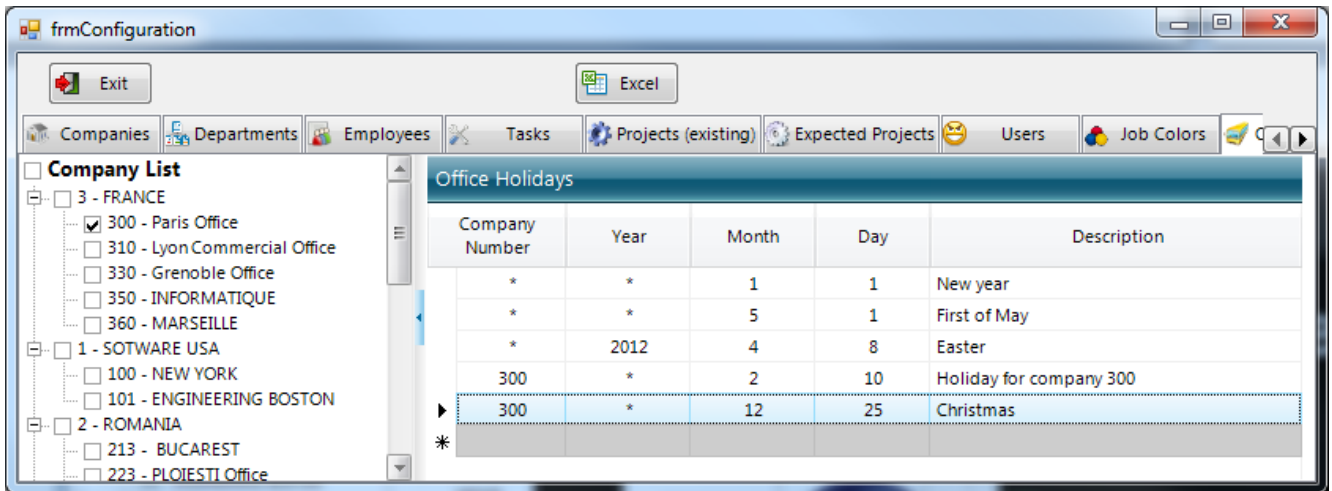
This is the list of Office Holidays (Easter, Christmas, New Year, etc), for each of your companies. The information is:

> qq) Company Number – type '*' if the holiday is for all companies
>
> rr) Year –
>
>> o   Type '*' if the holiday happens every year at the same date (ex: New Year, Christmas…)
>>
>> o   Type the year of the holiday if the date is different every year (ex: Easter)
>
> ss) Month, day – month and day of the holiday
>
> tt) Description

6.8   Job Colors
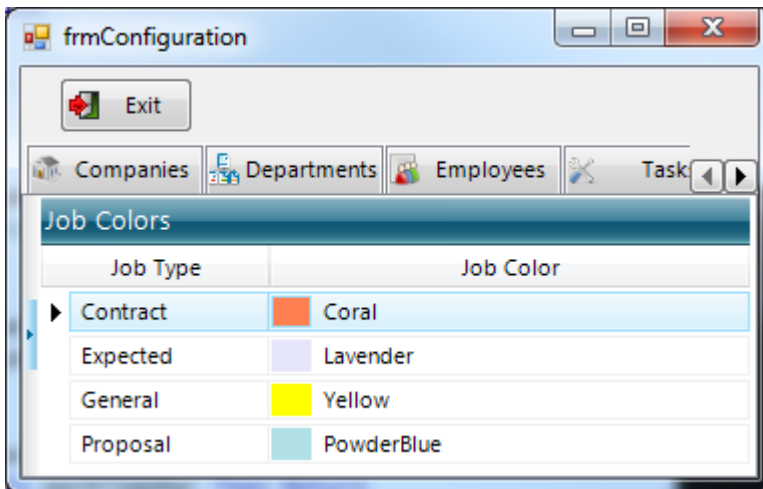
This table will allow selecting a color for each type of job. This color will be used for the time bars representing the work planning for the people.

6.9   User access
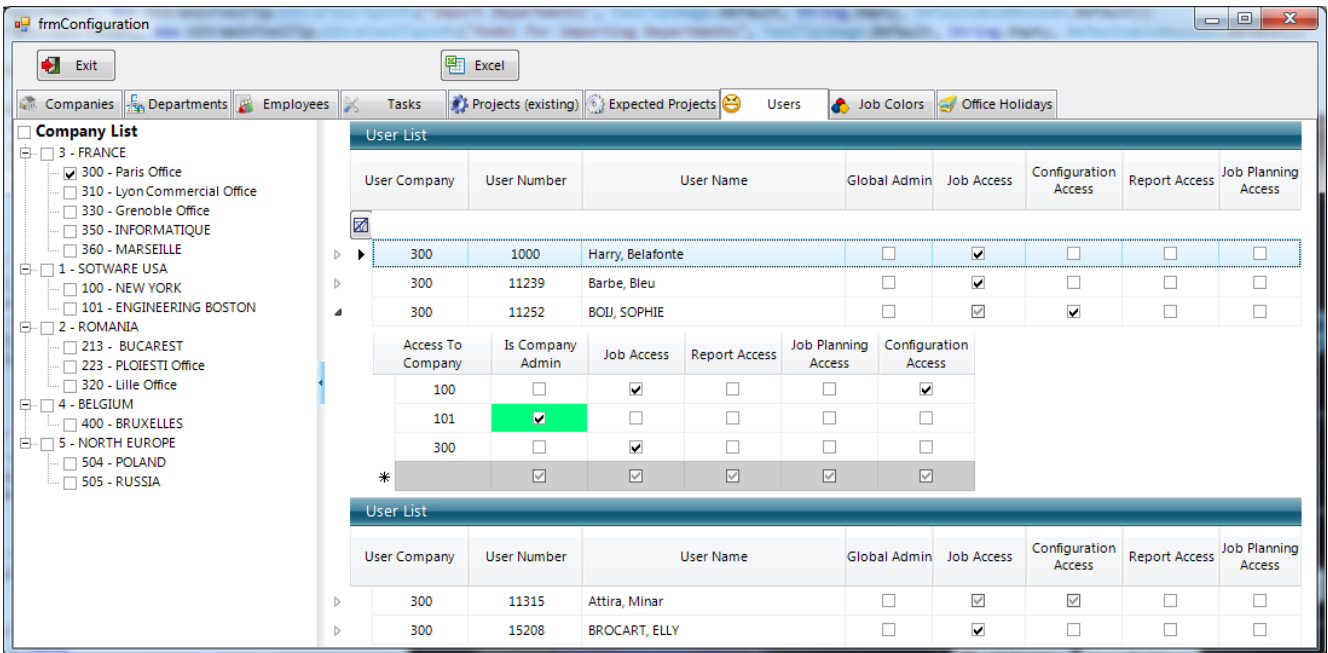
This is the window where you define the user access.

The default for a manager is RW access to his own employees, to be able to plan their work and holidays

This list has 2 levels:

- uu) The first level defines access to all companies
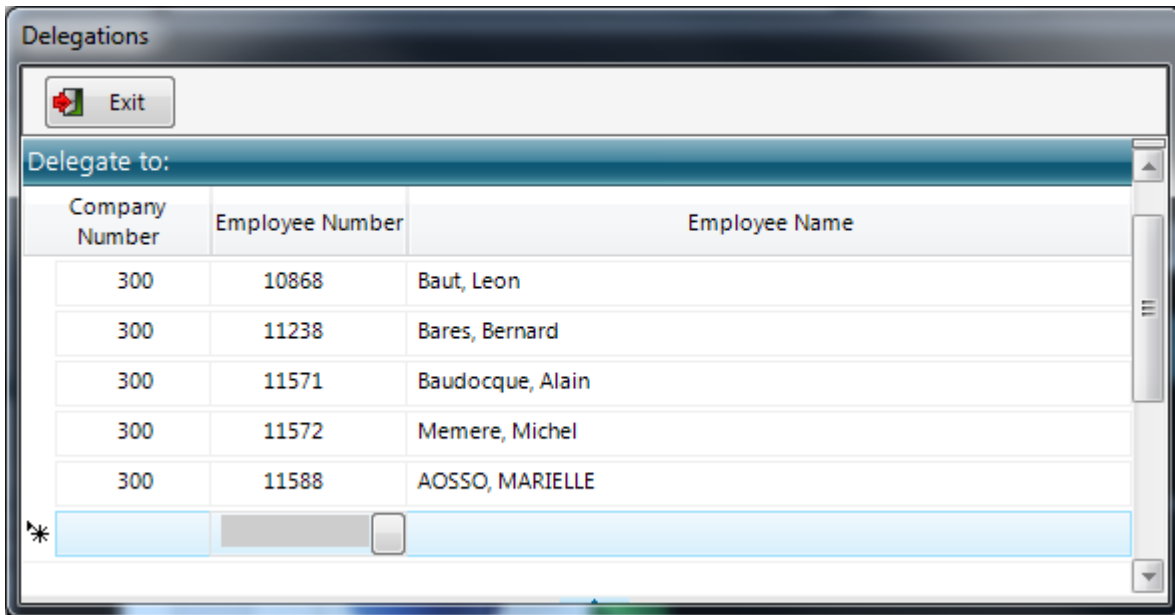- vv) The second level defines user access company by company

First level contains the following data, for each user:

- ww)   Is Global Admin – the user is a global administrator, he has RW global access
- xx) People Access - the user have access to all people in all companies
- yy) Job Access – has access to jobs from all companies (can plan people to work on any job, from any company)
- zz) Configuration access – has access to the Configuration Module and can do configuration for all data in all companies
- aaa)   Report Access – has access to reports (see Reports chapter)
- bbb)   Job Planning access – has access to the job planning screen

Second level contains the following data, for each user:

- ccc) Company Number – the company to which this user will have access
- ddd)   Is Company Admin – the user is a an administrator for this company, he has RW access to all data of this company
- eee)   Job Access – has access to jobs from this company (can plan people to work on any job, from any company)
- fff) People Access - the user have access to all people in this company
- ggg)   Configuration access – has access to the Configuration Module and can do configuration for all data in this company
- hhh)   Report Access – has access to reports (see Reports chapter)
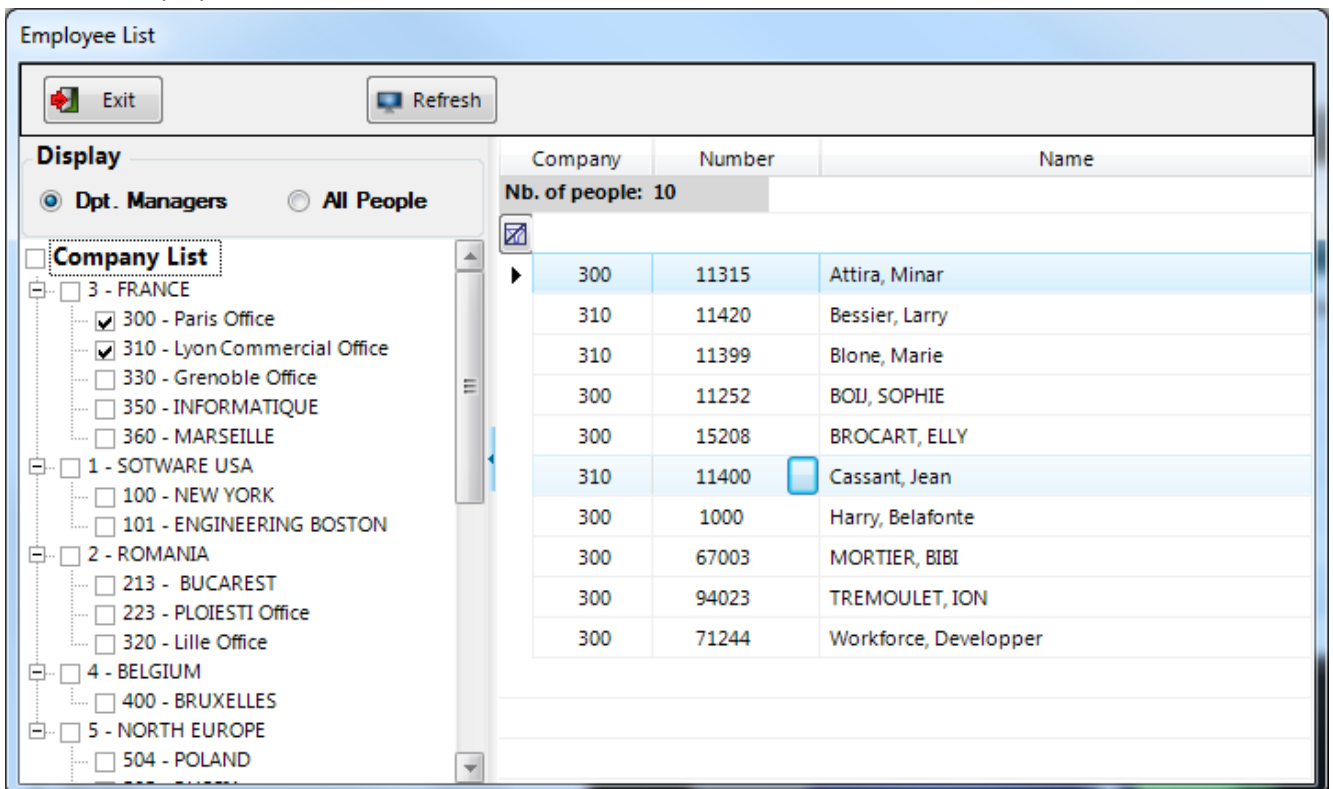- iii) Job Planning access – has access to the job planning screen

7. Delegation

You can give other people the right to work for you. Use this form to specify who has the right to replace you.

To enter a new user, use the last line. Click on the small button in the Employee Number cell and the following list will be displayed:

Select one or more companies in the left panel, select "Department Managers" or "All people" and then chose the desired person by clicking on the small button in the "Number" cell (or double-click on its line).
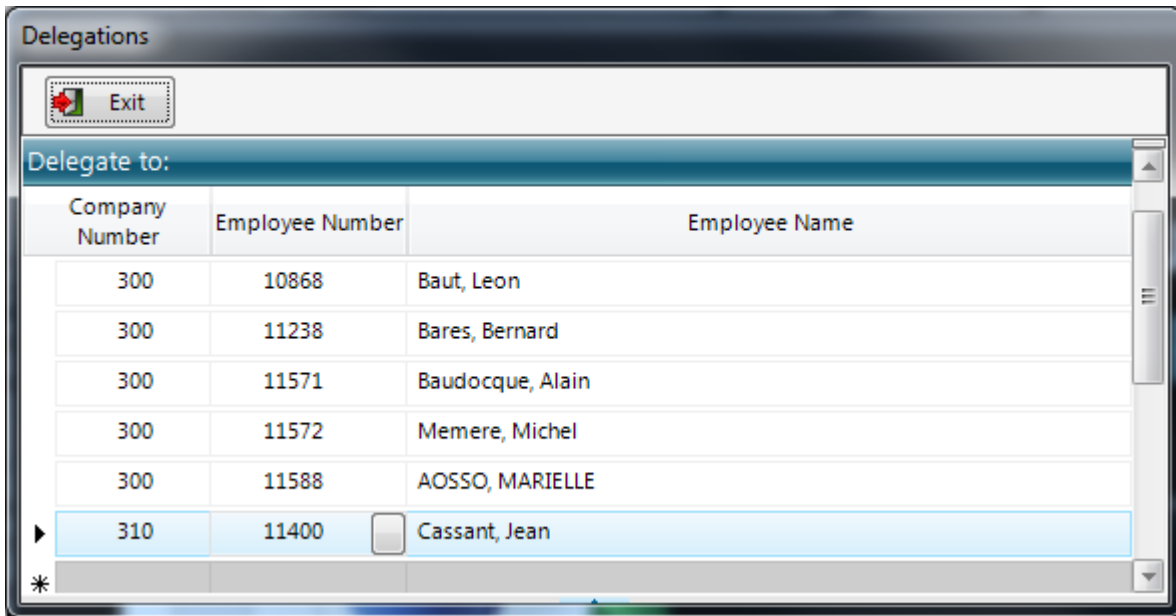
To delete a user from the list, click on its row header, then hit "Delete".

Each of the people in this list will be able to replace you. They will log into the system using their own credentials, and then they will click on the "Work For" button. The following window will display the people he can replace, and he can select the desired one.