Planning

How to change an existing planning?

There are several options for changing the planning. We summarize the main features and also show what situation is best considered.

1. The planning overview screen

The planning overview screen gives you most freedom to customize your planning. The main limitation of this screen is that you can not change tasks completed and tasks in progress.

1.1 Manual change through the planning screen.

The visual interface allows you to do basic operations without using a popup or menu. You always have the full overview while making adjustments and what you see is what you get.

1.1.1 moving a single task on the planning screen (drag and drop)

The easiest way to move a single job is dragging it by drag and drop. You should therefore click on the scheduled task and hold your left mouse button, then drag the task block to the desired position and release the mouse button. You can thus change both timing of the task and the employee for which this task were planned.

After dragging several special situations may arise which can be automatically adjusted:

- The job is on the border between two days. Here, the system will divide the task into two so that a portion is planned on one day and the rest on the other.
- The task block overlaps (or is close) to another block of the same task. Here, the system will attempt to paste these pieces back together.
- The task block overlaps with another block that does not belong to the same task. In this situation, nothing happens, but if you press the refresh button, the system will show the overlap by adding a new line to the overlapping blocks for the employee.

1.1.2 Manually change the duration of a single task

You can change the duration by double-clicking on a task block. This will make two arrows to appear at the ends of the block. You can now change the duration by sliding one arrow to the left or right. After moving one arrow, the system calculates the planning again and refreshes the screen. The arrows will then disappear.

1.2 Adjustments through the context menu

The context menu is the menu you can activate by right-clicking on a block. In this

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menu, you will find additional options for changing the task.

1.2.1 A task into two equal parts

by selecting 'splitting' from the menu, the system will split the task into two equal parts. The new blocks are together in the same place as the original block, but you can now drag them to another position. If you drag them back together they will mould in one block again.

1.2.2 Lengthen or shorten a task

You can shorten and lengthen a task, but this is more limited than the manual changing of the duration: shorten and lengthen will always apply to the end of the task. The starting position will not changed. The system will ask you for the number of minutes to add or subtract. Enter the desired number and press 'OK'. The calculation is performed and the screen will refresh.

1.2.3 Removing a scheduled task

"Remove" will remove the scheduled task block. If this is the last block planned for that task, that task is unplanned.

1.2.4 Advanced options with respect for the entire file

after selecting the option "advanced" you will see a popup showing the details of the selected function block, and a list of three possible actions you can perform. You can choose your action by clicking the button for the appropriate action. You can then manage one or more settings before performing the action.

1. Replan: You can replan this task rescheduling with the following tasks of the same file. You must enter a start date from which you want to plan. Once you click 'OK', you will be redirected to the planning console. You can see in the summary that the rescheduled tasks now are unplanned and the console allows you to replan all tasks.

2. Remove: Here you can remove the selected task or all tasks.

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