



QICSPLANNER User manual

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1. Vocabulary

Task

On a project you can add an unlimited number of tasks and subtasks.

This way you are able to divide and structure the project into manageable parts, by which budget vs. realization can be monitored.

Assignments


An assignment is when a resource is assigned to a task.

By moving you mouse pointer over the icons in Qics Planner a tool tip is available.

2. Tasks

2.1. Creating a task

At the Breakdown tab you can create, edit and organize tasks.

Use the  button to create a new task.

General:

Task name

Name the task.

Startdate

Determine the time span in which the task has to be completed.

Enddate

Determine the time span in which the task has to be completed.

Activity

Select the Activity this task is linked to.

Competence

Select the competence which is needed to complete this task.

Finance:

Hours

Enter the number of hours this task is going to take.

Rate

Enter the specific rate for this task. Default the project rate is filled in.

Amount

The amount is calculated.

Buttons:

Insert

Use the insert button to add the task to the project.

Insert as last

Use the insert as last button to add the task to the project, as the last task in the hierarchical structure.

Close

Use the close button to close the insert task screen without saving.





2.2. Deleting a task

At the Breakdown tab you can create, edit and organize tasks.

Use the  button to delete a task.

2.3. Organizing tasks

At the Breakdown tab you can create, edit and organize tasks.

Use the     buttons to create a hierarchical structure.



Move task up in the hierarchy



Move task down in the hierarchy




Move task left in the hierarchy (Change between task and sub task)



Move task up in the hierarchy (Change between task and sub task)



Use the  buttons to expand and collapse (show/hide) sub tasks.

3. Planning

At the Planning tab you can create, edit and delete assignments.

The Planning screen provides you with detailed information about the planning of the current project. It contains all information from the Exact Synergy Enterprise Calendar, Schedules and other QicsPlanner Projects. In one look you can see which employees are available.

3.1. How to create a planning

Select the task you want to assign.

Click on the date in the row of the resource you want to assign.

The maximum number of hours of the task is planned or the max number of hours available that day.

Other appointments in the Synergy Enterprise Calendar and the schedule of the employee are taken into account.


3.2. How to edit a planning

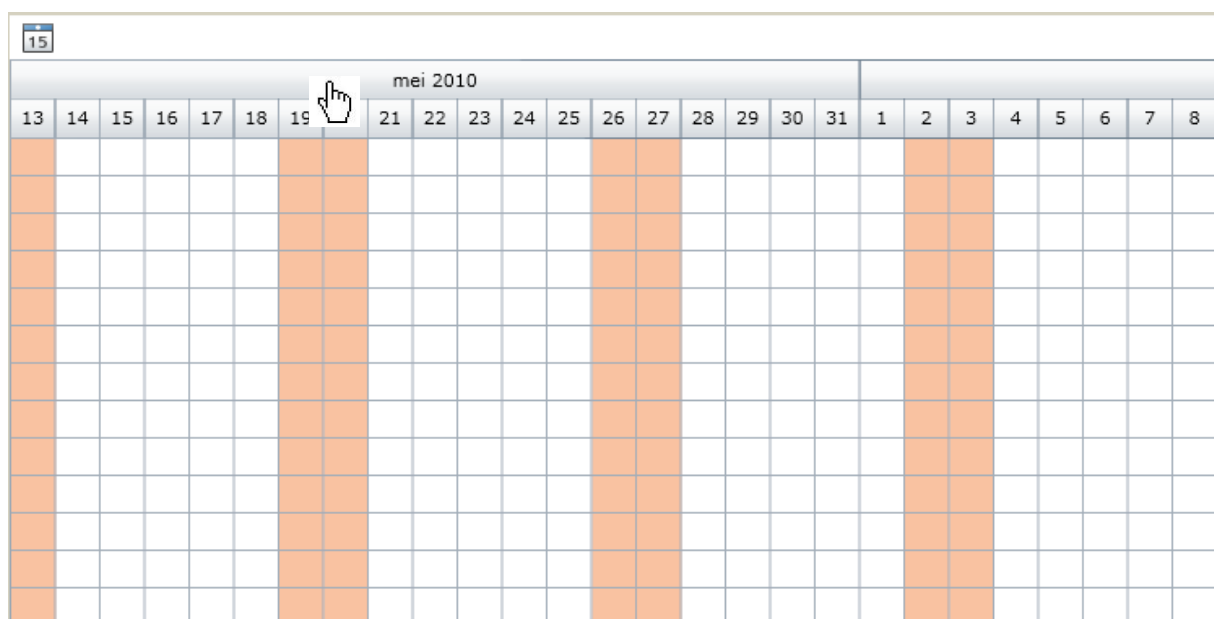
The number of hours can be edited by clicking with your left mouse button on it.

3.3. How to delete a planning

The assignment can be deleted by clicking with your left mouse button on it and then press delete.

3.4. Navigating through the calendar

Use the  button to select a different start date, or select the column with the name of the month and drag it to the left or right.

The screenshot shows a calendar interface for the month of May 2010. At the top left, there is a small calendar icon with the number '15'. Below it, the main calendar grid is displayed. The header row shows the days of the month from 13 to 31, with the month name 'mei 2010' centered. The grid consists of columns for each day and rows for planning. A mouse cursor is hovering over the date '19', which is highlighted in orange. Other dates like 26, 27, and 3 are also highlighted in orange, indicating they are selected or active.


3.5. Plan a task automatically

After entering a task in QicsPlanner it is possible to plan the task automatically based on a specific employee or the employee with the most availability.

Plan a task automatically for a specific employee:


Select the task

Select the employee

Press the  button.

Plan a task automatically:

Select the task

Press the  button.

3.6. Progress Tab

The Process screen provides you with information about the status of the current project.

In this screen the 'work remaining' can be filled in.

For example a task is created for 6 hours.

The realized hours are 5 but the estimated work remaining is still 2 hours.

This valuable information is used in the Project reports.

4. Setup

In the top menu bar you will find the setup menu.

4.1. Competences

Manage Competences

In the horizontal toolbar choose setup/Manage competences

Use the "New" button to create a new competence.

ALL competence

Assign competences to resources

After selecting a resource a list with all the competences shows, use the > or < buttons to add or remove a competence for this employee.

Use the >> of << buttons to add or remove all competence at once.

New

Assign resources to competences

After selecting a competence a list with all employees shows, use the > or < buttons to add or remove an employee for this competence.

Use the >> of << buttons to add or remove all employees at once.

4.2. Request Types

Excluded request types

When QicsPlanner is used in combination with QicsTime the Qicstime Request for updating Realization can be excluded in QicsPlanner.

License

Manage resources

Use "Manage resources" to add resources to Qics Planner.

License info

Use "License info" to check the validation of the license and the number of licenses in use.

Update license

Use "Update license" to link a new license file to Qics Planner.

5. QicsPlanner and Synergy Enterprise

During the installation of QicsPlanner, two Synergy Enterprise request types are created.

9000 QicsPlanner Assignment

9001 QicsPlanner Task

For every task created in QicsPlanner the request 9001 QicsPlanner Task is created in the workflow of the project. The following information is linked to the request:

Account, Project, Item, Description, Start Date, End Date, Number of hours, hour rate, Competence.

For every assignment the request 9000 QicsPlanner Assignment is created in the calendar of the resource.

The following information is linked to the request:

Account, Project, Item, Description, Start Date, End Date, Number of hours, hour rate, Competence, Linked Task, Resource

The definition of the request flow, for example, who can approve the request can be adapted to your specific needs.

6. QicsPlanner and QicsTime

The QicsPlanner Assignments (Request type: 9000 QicsPlanner Assignment) can be imported in the QicsTime timesheet.

After importing the Assignments the hours only have to be realized.

After realizing a request in Synergy is created.