



# VISUAL PLANNING

VERSION 7

Visual Planning 7 will be released on **January 23<sup>rd</sup>, 2020.**

Here is a list of the main features included in this release.

## Technology

- An autonomous database management system based on MariaDB 10.2 has been integrated to Visual Planning for an easier deployment
- Microsoft OneDrive can now be used as storage location for attached files
- Tomcat 9.0 has been integrated to VPServer

## Admin Center

- Password security: the list of special characters has been expanded. The list of passwords that cannot be re-used now includes 6 passwords. Unsuccessful login attempts are now traced from one session to another.
- New options for resetting forgotten passwords
- Performance tests now include measures of database performance and show color coded results in line with application minimal requirements
- New planner indicators show number of data items contained in a planner
- Individual user's connection history can now be accessed from the user menu
- A list of online users can be accessed for each client type
- Default user icons shows initials of the user full name
- Planners can be created from a VPI file
- New options to delete detailed history
- Block application access for specific IP addresses

## REST API

- Calling a function now applies existing constraints in the target planner and triggers notifications (e-mail, import/export)
- New administration functions to read, modify or delete users and user groups
- New API demonstration tool available

## Dimensions, forms and headings

- QRcodes can now be automatically created using event or resource attributes

- Dimensions can now be created from scratch based on a csv or xls file, including headings and data (resources)
- Dimensions can now be created and linked by selecting existing headings from another dimension and transforming them in a Resource heading
- Events can now be created from a dimension that contains at least a Date/time heading and a Resource heading
- Event value headings can now retrieve multiline text
- Control columns can now be used to calculate an average of event values or resource values
- New heading type “String operation”: allowing a text string to be generated based on resource headings or form headings
- New heading type “Summary”: allowing a multiline text to be generated based on resource headings or form headings (each line being an event)
- Single choice list headings can now be interdependent to create a cascading logic between several headings
- Resource color can now be based on heading values, such as a threshold color for an operation heading or control column, or the color of another dimension through a Resource heading
- In Counter headings, increments can now be based on the values of a heading
- Counter headings contained in forms can now be made unique by adding the counter to the list of unique headings of the form
- A list of resources can now be displayed directly from the dimension settings panel, where resources can be created, modified or deleted
- Geotagging: added a “check-in only” option to geolocation headings that restricts the recorded position to the device’s current position
- New options for icons in dimensions: base color, shape
- Select an icon from the file browser in resources

## Import / export

- Customize in-browser response messages (OK, KO) when calling import / export contexts through a URL using plain text or HTML.
- Colors and icons can now be imported / exported using hexadecimal (#RRGGBB) and Html Base64 format
- Geolocation headings now update automatically when importing resources
- Source and targets of an import / export can be defined using SFTP protocol

## E-mail / mailmerge

- Merged file names can now be generated based on event attributes
- Documents can be merged using an event filter at the resource level
- Documents can be merged using properties of children events matching a filter at the parent event level
- E-mail templates can now contain 'Bcc' recipients

## Look&Feel / UI

- Styling for single choice dropdowns, checkboxes, input areas (text, dates, digits), notifications, warnings and error messages has been updated
- Functions associated with a heading are now accessed through a single icon
- Updated styling for tabs, now shown at the top of the view
- Lighter, decluttered UI
- Transparency effects on events crossing non-working periods for improved readability
- A background image can now be selected and displayed in the user login screen
- New Dashboard layout showing data pulled from various entities of the planner (reports, workloads, events or resources, quick access to favorite displays...)
- Added a zoom feature (scrollable) in event reports displayed as tables, resource lists, resource tables, event tables, and schedule view
- Resource views displayed as lists can now be customized using HTML
- New vertical marker on schedule views showing the current timestamp
- Updated styling for the date selection component
- Event attributes can now be edited directly in event lists displayed as tables (in-cell edition)
- Simplified, reorganised contextual menus
- Resource selection windows can now be shown in tree mode
- In tree mode, closed nodes now show common values for all items contained in the node
- Resources editors can now be used as views in displays
- An event Gantt can now be displayed in a resource editor
- New search option added to the dimension and headings settings panel

## Filters

- Resource filters can now be created based on a search
- Added an option to go back to previous search after applying a search

- In vertical hierarchies, events can now be filtered based on whether they contain at least one child event matching specific criteria

## Events reports

- “Grouping” is now called “breakdown”
- The breakdown time period can now be selected directly in the report view
- Added options for time periods in calculations, allowing events to be computed depending on whether they start in, end in, or cross a time period, or to be prorated based on their duration in each time period shown in the report

## Event views

- An hourly scale is now shown when using weekly scrolling
- In table mode, columns can now be frozen on the right

## New module: VPBluePrint

- Add and use plans, self-made maps, and drawings in VP
- Define areas within a plan (drawing tool) and associate names, colors, and comments
- Associate a resource to an area (new heading type)
- New Plan View showing resources on the plan: edit resources directly from the plan and create events through drag and drop

## Miscellaneous

- Detailed history: last modification is now shown in the tooltip for each attribute
- Added option to delete all links of a selection of events in contextual menus
- When compacting events, links can now be created between selected events

## VPPortal

- Improved look & feel – options now grouped in lateral menus, updated UI components, customization options for color theme, for a lighter, more refined UX
- Schedule View: resource headings are now shown in a table with sorting, grouping and filtering options

- The latest accessed context is now saved at the end of a session and shown directly upon re-login (tab, date, filters, panel size)
- New Kanban View
- Complex views: lists of resources can now be added to events lists, schedule views, agenda views, and Kanban, allowing users to create event or assign resources through drag-and-drop
- Improved responsive mode with enhanced adaptability for smaller screens and dynamic switch between portrait or landscape orientation
- Dashboard View, including a buildable panel of widgets showing data pulled from various entities of the planner (reports, workloads, events or resources...)
- Added options in contextual menus: edit, delete, duplicate, assign
- Show children events in vertical hierarchies through a tag (number of children events), highlight events in a family
- The header of input editors is now customizable using HTML
- Tabs can be added to input editors
- Cascading logic between several single choice list headings
- An hourly scale is now shown when using weekly scrolling in Schedule Views

## VPGO

- Updated design for the start screen / context list (tiled display)
- View, create, edit and delete children events from an event's input editor
- View create, edit and delete events from a resource input editor
- Breadcrumbs have been added to input editors for an easier navigation
- Tabs can now be added to vpgo input editors
- Search or filter resources using a barcode or QR code
- New collapsible panels in input editors
- Cascading logic between several single choice list headings
- Use app notifications to create alerts and reminders before an event starts

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PLANNING**

**VISUAL PLANNING  
USER CLUB  
OFFICIAL RELEASE**

**JANUARY 23, 2020**  
AT MUSEE DU QUAI BRANLY - JACQUES CHIRAC  
LOCATED 37 QUAI BRANLY, 75 007 PARIS  
FRANCE

It is with great pleasure that we invite you to the 7th edition  
of the Visual Planning User Club to celebrate  
the release of the latest version of Visual Planning, Visual Planning 7.

View the museum - Musée du quai Branly - Jacques Chirac, picture by TinPoco

## Visual Planning 7 Release & 2020 User Club

Including

**Release keynote and live demo**

**Workshops and use cases**

@ Musée du Quai Branly, Paris

**FREE EVENT OPEN TO ALL CUSTOMERS AND PARTNERS!**

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