



DRS

Customer Release Notes

Version 6.1.0

Project Planner Web

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DRS Version 6.1.0

Development of DRS Version 6.1.0 is now complete and was released in March 2023.

Version 6.1.0 focuses on the introduction of Project Planner Web a full rebuild of the DRS Project Planner module within the main DRS product.

DRS Project Planner Web allows organisations to plan medium and large scale projects efficiently, in real time from a handheld device or from the main DRS application.

It brings seamless integration with the core DRS application and Project planning functionality within a unified UI to make unleashing the full power of DRS's planning capabilities easier than ever.

Alongside Project Planner Web we have, as always continued to review feedback and make improvements to the entire product and this new feature release is accompanied by a set a fixes and improvements.

What's new

This section describes the new or improved features we have introduced in this release and key fixes and improvements.

DRS 6.1.0

- | | | |
|--------------|------------|--|
| NEW | DRS - 5576 | Project Planner Web |
| FIXED | DRS - 6657 | DRS / PP API error. |
| FIXED | DRS - 6647 | 'Too Many Connections' MySQL error |
| FIXED | DRS - 6628 | Not able to import customer data for live |
| FIXED | DRS - 6531 | Error when trying to get Worker list |
| FIXED | DRS - 5992 | Issues with Meetings |
| FIXED | DRS - 6449 | Working hours calendars with no days |
| FIXED | DRS - 6332 | Add object prefix to columns added to grid |
| FIXED | DRS - 6322 | PP Worker external key does not save |
| FIXED | DRS - 6185 | Multi day and Multi trade issues |
| FIXED | DRS - 5761 | Mapping server does not display all map tiles at certain zoom levels |

FIXED

DRS – 5897 Display mode and Display type columns using incorrect type

IMPROVED

DRS – 4803 MySQL connection pooling improvements

A closer look

This section provides extended information on key features.

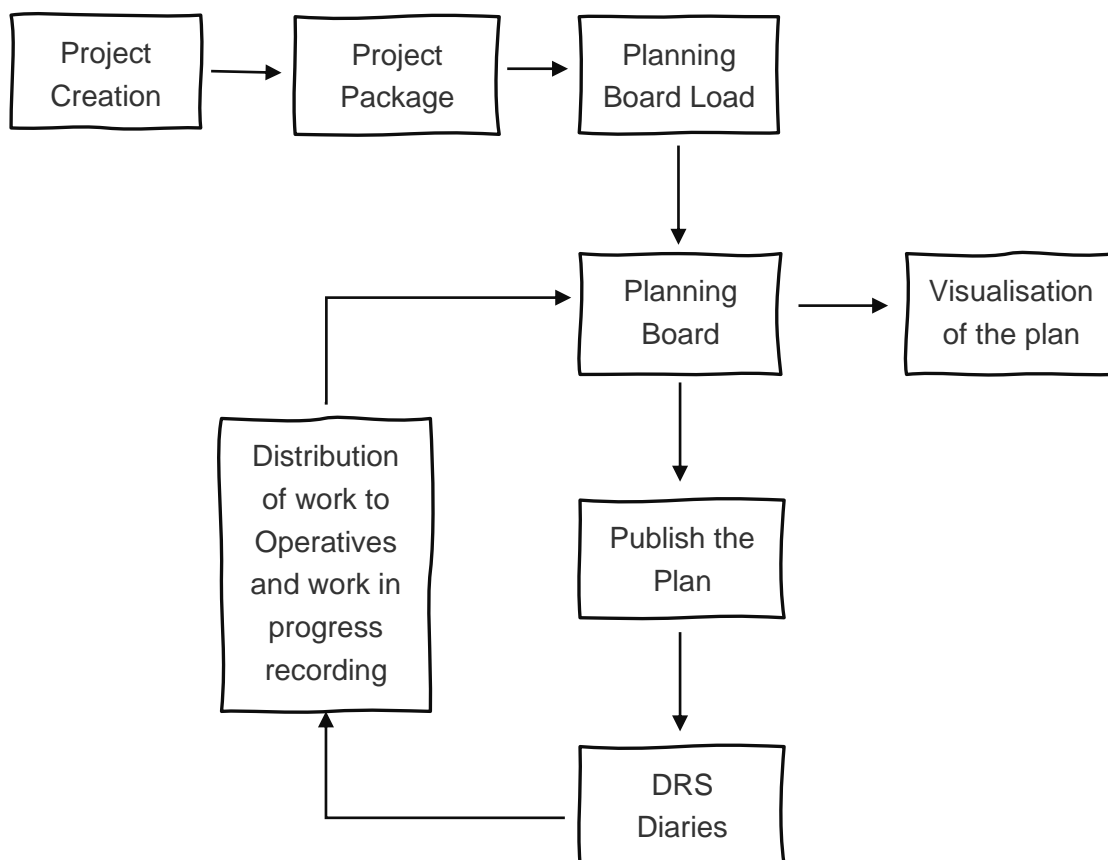
New Features

Project Planner Web

What is Project Planner Web

DRS Project Planner Web provides functionality to help visualise, allocate and manage medium and large scale Project style work and allocate it to your workforce.

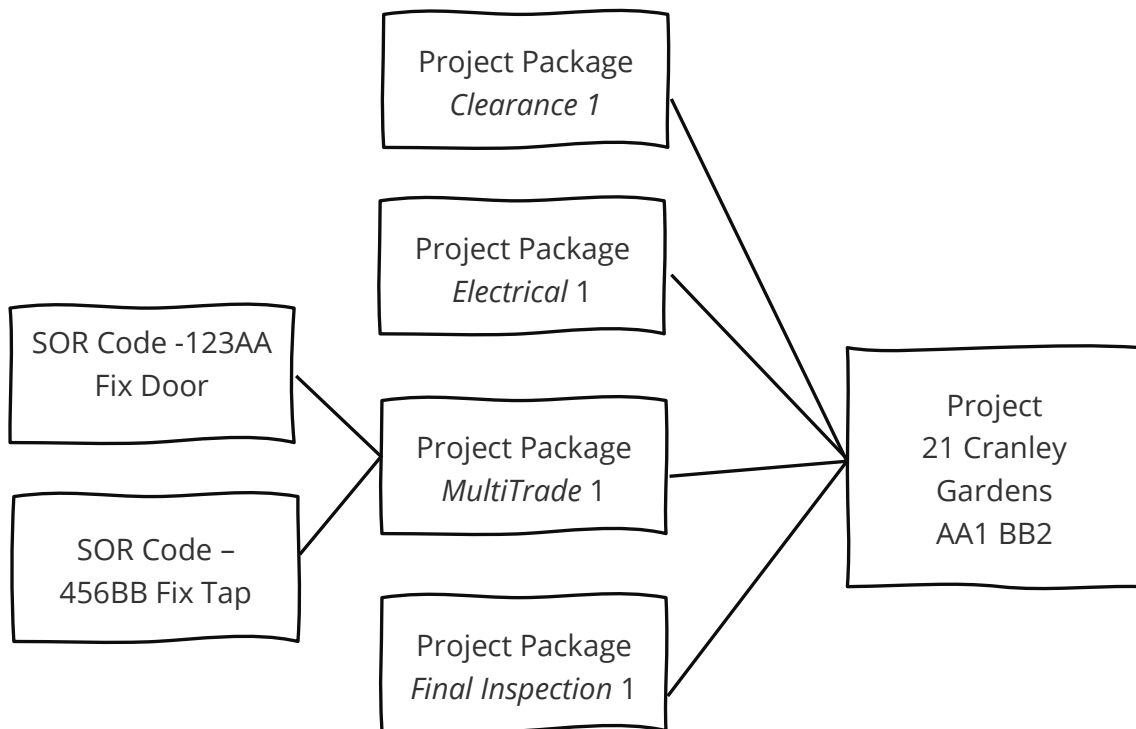
The following diagram provides an overview of the key components of the system:



Definition of Project and Project Packages

The initial definition of the Project and the ongoing manipulation of the Project as requirements change is done by organising the Project into Project Packages. The initial data could be from a handheld survey, job management system or be manually entered. Project Planner will analyse these and organise them into Project Packages, based on your unique configuration and requirements.

The Project structure is created from the job lines' or SOR codes. The Project consists of Project Packages which are made up of a number of SOR codes as illustrated below:



The Project is defined in terms of a number of interdependent Project Packages and the sequence in which they must be done. Each Project Package has a *Project Package Template* which determines what type of resource can carry out this work.

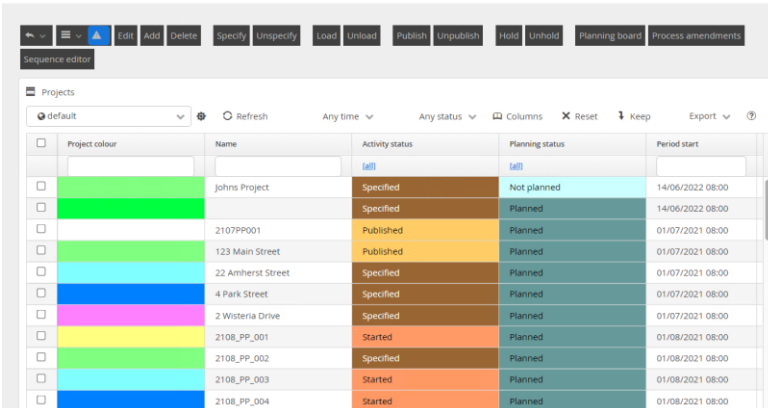
Loading the Planning Board

Projects are loaded onto the planning board in priority / target date sequence and then according to a predetermined set of rules about how resources should be used. The planning board is a visual representation of the work required for a Project. It is possible to show all Projects and all resources or a subset of this information.

The planning board can be accessed via the View Planning board button after selecting your Projects, Project Packages or Resources from the appropriate lists.

The Planning board is presented in a Gantt chart using time and date blocks. This view is fully customisable to show the right detail in the right way for your need.

Projects



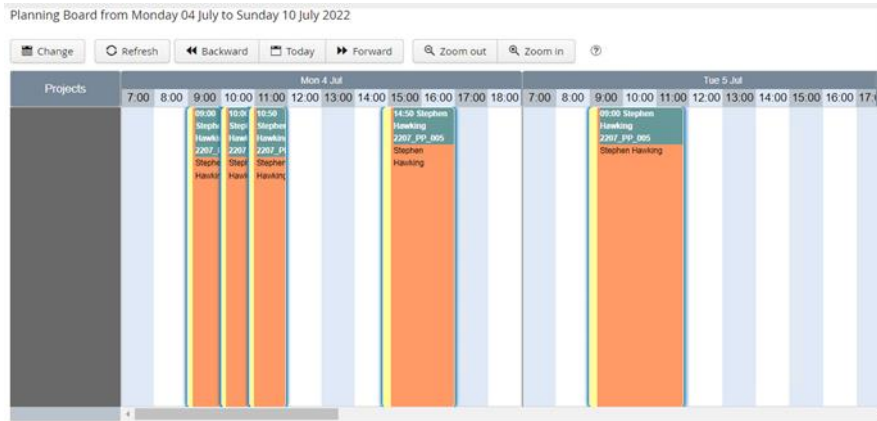
The screenshot shows a software interface for managing projects. At the top, there is a menu bar with options: Edit, Add, Delete, Specify, Unspecify, Load, Unload, Publish, Unpublish, Hold, Unhold, Planning board, and Process amendments. Below the menu is a 'Sequence editor' section. The main area is titled 'Projects' and contains a table with the following columns: Project colour, Name, Activity status, Planning status, and Period start. The table lists several projects with their respective colors, names, activity statuses, planning statuses, and start dates.

Project colour	Name	Activity status	Planning status	Period start
	Johns Project	Specified	Not planned	14/06/2022 08:00
	2107PP001	Published	Planned	14/06/2022 08:00
	123 Main Street	Published	Planned	01/07/2021 08:00
	22 Amherst Street	Specified	Planned	01/07/2021 08:00
	4 Park Street	Specified	Planned	01/07/2021 08:00
	2 Wisteria Drive	Specified	Planned	01/07/2021 08:00
	2108_PP_001	Started	Planned	01/08/2021 08:00
	2108_PP_002	Specified	Planned	01/08/2021 08:00
	2108_PP_003	Started	Planned	01/08/2021 08:00
	2108_PP_004	Started	Planned	01/08/2021 08:00

You can easily change the priority, sequence, duration or allocation of any Project Package on the planning board.

Visualisation of the plan

The Project planner enables you to quickly see the status of each Project. In particular colour schemes let you know if Projects are running late and which activities have been started or completed.



Publishing the plan

When you are satisfied with the following days planning, you can publish this into DRS for delivery. Any Project Package which is published which spans more than 1 day on the Planning Board is split into separate appointment in DRS spanning the required days.

Distribution of Work to Operatives and Work In Progress recording

Project work will be sent to the handheld device exactly as a responsive repair. The only difference will be that when an update occurs it will update the DRS diary as well as the planning board.

When the operative has completed a Project Package they can request their next job using their mobile device.

Where a Project Package is represented as several appointments in DRS because it spans more than 1 day, each appointment is normally updated as work progresses. However an optional Completion Status is available which can complete all outstanding appointments if used.

The Process

Project Creation

The Web Service Gateway or Inbound Connector can be used to send in createOrder and Order-Create requests and dependent on Priority these are loaded as responsive repairs or Projects.

This means data can be interfaced into Project planner without changes to the integration software by the housing management or contractor system.

You can also create projects directly within Project Planner Web using pre-defined templates which can specify the required works, or by manually selecting each required task (SOR).

Project Specification

For the selected Project, SOR's which have not been specified are processed and grouped into Project Packages. SOR's with the same Project Package and order number are combined into a Project Package.

- Prior to Specification, SOR's can be changed, deleted or added
- Earliest Start Date for a Project Package is the earliest date for the Project
- Target Completion Date is the Target Date from the Project
- The required effort is set to the sum of all SOR's
- Notes are either a concatenation of notes from all the associated SOR's or the notes from the Project. This is decided by your configuration.
- The Project Package identifier is created using the Work Classification

Planning Projects

All tasks for Project(s) are sorted into a main queue by Priority & Target Date, the project with the highest priority is loaded first. Target date is used to differentiate Projects with the same priority and the Earliest Start Date is used to determine when resource availability checking is to start.

The resource which can carry out the Project Package soonest will be allocated the work. Once an operative is allocated to a Project, by default the same operative is allocated throughout the Project for any Project Package they can carry out. A configuration flag enables specific Project Packages to bypass this rule.

For specific planning which may fall out of the standard configuration, Project Packages can be manually planned.

Publishing Projects

All uncompleted Project Packages within the date range are published. "Not Scheduled" or "On Hold" Project Packages are NOT transferred. The Activity Status moves from "SPECIFIED" to "PUBLISHED" and all published Project tasks are loaded into the DRS diaries, resource locked and locked to the specific day and time.

Travel time can be used during the publish process if configured to do so. The travel time calculation used is the same configuration used in standard DRS scheduling.

Distribution of Work

Updates to DRS Project Planner Web will depend on your method of task despatch to your operatives.

DRS Project Planner Web is most effectively delivered in conjunction with Mobile Working. Should that not be possible, providing task lists to resources manually can be successful, though manual planning updates will be required.

If Mobile Working is implemented in conjunction with DRS Project Planner Web, updates to the appointments can be fed directly back from the mobile device which will update both the DRS appointment and the Project Planner Web planning board.

Paper based or Manual task despatch

- Daily Run Sheets by Operative
- Project Work Schedule based on Initial Definition of Project Packages
- Manual completion process for Project Packages – manual completions in the DRS diaries will be fed back to the Planning Board, maintaining the same status in both systems

Mobile

- By operative
- The “Get schedule” command will give the operative a list of his days work
- The operative will be able to start, and complete tasks based on the delivered tasks to the Mobile device
- The operative can set a completion status which can result in a new Follow On Project Package being created
- When the updates take place in the DRS diaries the planning board will be updated at the same time
- A configurable Task Completion status can also be entered which will complete all open appointments for the Project Package.
- The Get Schedule will include all Task detail including SOR's (if required)

Hold

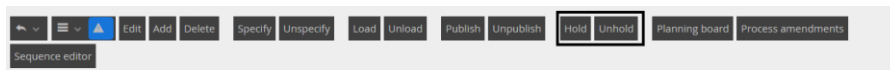
Both Projects and Project Packages can be placed on Hold.

If a Project is placed on Hold, Project Planner will not load any outstanding Project Packages onto the planning board. All currently loaded Project Packages will be unloaded from the Planning board.

If an individual Project Package is put on hold, any outstanding Diary Items will be unloaded from the planning board if loaded. Any attempts to load the held Project Package will be met with a warning and the selected Project Package will not be loaded.

Putting your projects on Hold

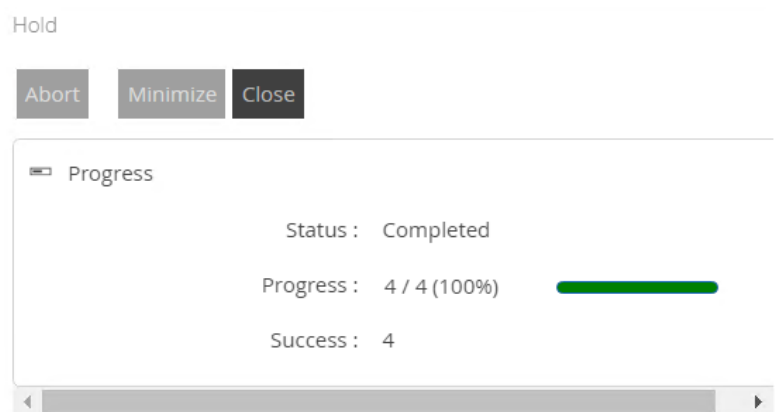
On the Project or Project Package view list, a Hold button can be seen in the button menu.



By selecting one or multiple Projects or Project Packages from the view list and clicking this button a dialogue box will appear which will contain the details of the selected Project Packages that can be placed on hold.



Comments can be placed against the projects you are putting on hold. These comments. When you enter this and click 'Hold' a process dialogue box will be shown.



Once your effort is completed, the progress bar will be set to 100% and both the Project(s) and or Project Package(s) will be put on hold.

Project packages

The image shows a screenshot of a 'Project packages' table. The table has columns for 'Id', 'Activity status', 'Planning status', 'Planning sequence', 'Global planned period ...', and 'Global plan'. The 'Activity status' column is highlighted with a dropdown menu showing 'Hold' and 'Specified'. The 'Planning status' column is highlighted with 'Not planned'. The 'Planning sequence' column is highlighted with '500'. The 'Global planned period ...' column is highlighted with '02/09/2022 14:47' and '02/10/2022'.

Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global plan
2109_Void Plumbing*17	Hold	Not planned	500		
PP45	Hold	Not planned	500		
PP46	Hold	Not planned	500		
PP47	Hold	Not planned	500		
PP52	Specified	Not planned	0	02/09/2022 14:47	02/10/2022

The Project Package will be updated on the Project or Project Packages view with an Activity Status of 'HOLD' and an issue will be created next to the Project Package

Within the Project and Project Packages, the Hold comments will be held within the Comments field. The Comments field can contain the history of the Hold reasons, if there are multiple.

When the hold is removed from a Project Package it will return to a Specified status allowing for it to be loaded and published again.

Hold: Status Considerations

New

At a New status, the only object known to Project Planner Web is the Project object, and as such, the Project object is the only object that can be put on hold. Project Packages and Diary Items are not created until the Specify and Load stage.

Specified

Once a Project has been specified the Project Packages and Diary Items will have been created and therefore these can be placed on hold via the Hold function on the Project Package summary screen or by using the right click menu for the Planning Board views.

If a Project is Specified after being put on Hold, any existing Project Packages are removed from being on hold they return to a specified and unplanned state and the issues reported against each Project Package will be removed.

Loaded

When a Project is loaded it is still possible to place all Project Packages on hold. When loaded Project Packages are placed on hold the Planned Start/ End and the Planned Resource will be removed. Once the Project Packages are removed from being on hold they are returned to a Specified state ready to Loaded and Published.

Published

Once a Project or Project Package has been published it can still be placed on hold as long as it has not yet been Started. When published Project Packages are placed on hold the Planned Start/ End date and the Planned Resource will be removed. The Hold function will also un-publish the Project Packages from DRS.

Once the Project Packages are removed from being on hold they will be returned to a Specified state ready to be re-loaded and published into DRS once more.

When Project Packages are published into DRS the On Hold reason will not be sent across. Instead the Project Display Name will appear in the Order Comments field on the job allowing for the Project to be identified. The On Hold reason can then be found in Project Planner if required.

Started

If a Project Package is in a Started state it cannot be placed on hold. For the Project Packages that are not started the Diary Items will be removed and the jobs will also be removed from DRS.

The started Project Package will remain in DRS ready for the Operative/ Planner to complete and create a follow on for the remaining work.

If a Project Package has been planned across multiple days the same process as per above will be carried out, Diary Items for the future days will be removed and a follow on will be required to complete the remaining work. The operative will then be able to update the Started Project Package to show how much time was spent on the work before the Project was placed on hold.

If the Started Project Package does not need to be placed on hold (for example, the Project is put on hold due to asbestos, but the started Project Package is garden based) then all other Project Packages will be unpublished and placed on hold. The started Project Package will remain in DRS as will any jobs for the same Project Package that have been planned on future days.

Forcing your Planning

Within Project Planner Web, it is possible to force scheduling and appointments, as to over-ride any automatic scheduling that might be applied to it. Forcing your Planning will automatically Time Lock and Resource Lock the task.

The Project Package still cannot be published while it is in an On Hold state however once it is removed from being on hold and it is re-loaded the time lock will remain in place and a resource will be assigned to the Project Package.

Follow On Project Packages

From time to time, it may be necessary to create additional appointments to complete your scheduled work. You can complete this by creating Follow On appointments, as you would with standard DRS Repairs.

If a follow on is created for a Project Package then these are automatically linked as being a relative of the original Project Package. A follow on cannot be created for Project Packages that are currently on hold.

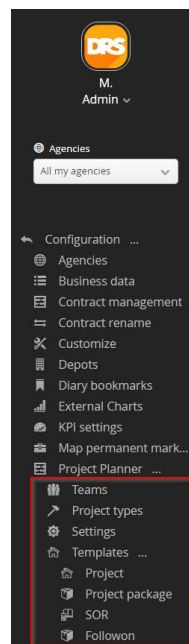
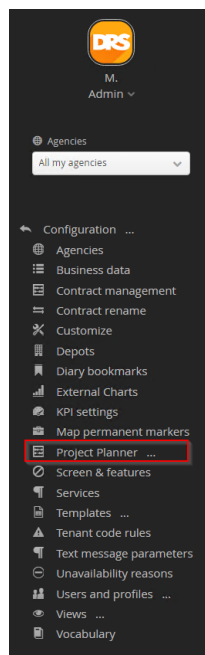
Hard Dependency

This function was added to work with the Project Planner Pull functionality. If Mobile Gateway has to pull and publish a Project Package onto a resources diary then it will check the hard dependency at that point so that if a Project Package is hard dependent on another Project Package that has not yet been completed then it will be ignored, and Mobile Gateway will move onto the next Project Package. This was to stop Project Packages that were dependent from being pulled onto a resources diary if the other work hadn't been completed yet.

Configuration

Project Planner configuration will be available if the appropriate Project Planner licencing has been applied within your DRS Configuration.

Project Planner configuration is accessed by expanding the Configuration Menu and then further expanding the Project Planner menu.



Configuring Project Types

Project Types are used within Project Planner Web to identify the Inbound Orders which will be assigned to Project Planner for scheduling.

Each group of Priorities should be given its own Unique Project Type ID and Unique Priority or set of Priorities.

Project type list

<input type="checkbox"/>	Project type id	Priorities	
<input type="checkbox"/>	Capital	C	
<input type="checkbox"/>	Project	P	
<input type="checkbox"/>	Void	Void	

Records:3

NOTE: Priorities are CASE SENSITIVE and are configured in your 'Business Data > Order > Priorities' Object.

Add a Project Type

To add a new Project Type, click the Add Button. Create a Unique Project Type ID and select your required Priorities.

Project type

The screenshot shows the 'Project type' form. The 'Project type id' field is highlighted with a red box and contains the text 'Fire'. Below it, the 'Priorities' field is also highlighted with a red box and contains the text 'P, PRIORITY 2'. The 'Possible values' list includes Capital, EMERGENCY, Gas, PRIORITY 1, Priority V, Project, V, and Void. The 'Selected values' list includes P and PRIORITY 2.

Once satisfied, click Save.

Project type

The screenshot shows the 'Project type' form with the 'Save' button highlighted with a red box. The 'Project type id' field contains 'Fire' and the 'Priorities' field contains 'P, PRIORITY 2'.

Your Project Type will be listed in the main list.

Project type list

The screenshot shows the 'Project type list' table. The table has columns for 'Project type id' and 'Priorities'. The 'Fire' project type is listed with 'P, PRIORITY 2' as its priorities. The table also shows 'Capital', 'Project', and 'Void' project types.

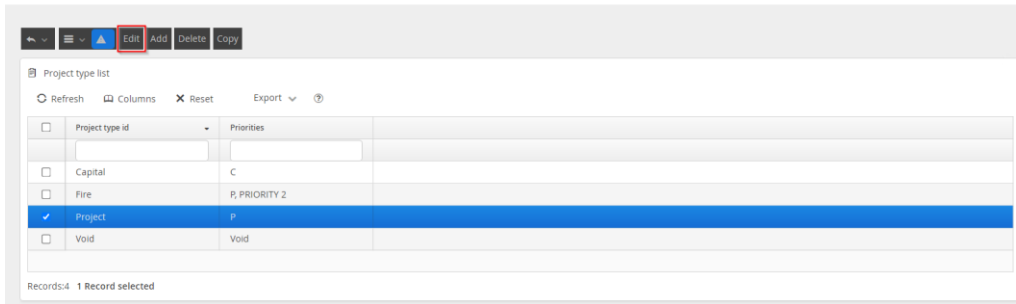
Project type id	Priorities
Capital	C
Fire	P, PRIORITY 2
Project	P
Void	Void

Records:4

Edit a Project Type

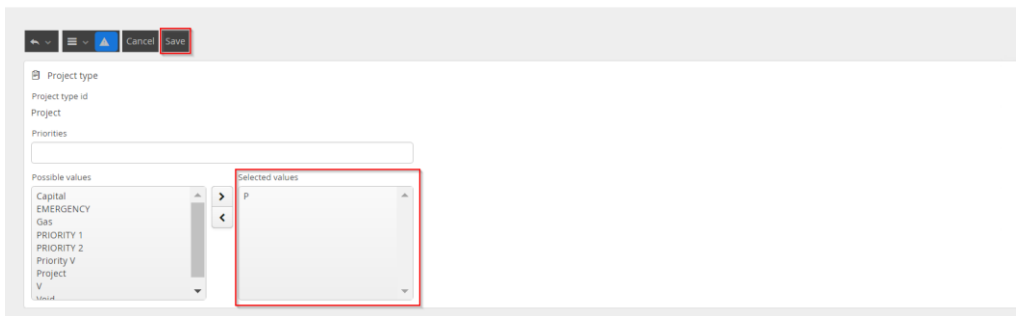
You can Edit a Project Type by clicking on the Project Type itself and clicking Edit, or selecting the Project Type from the main list and clicking Edit.

Project type list



The edited Project Type will only allow a change of Priority.

Project type

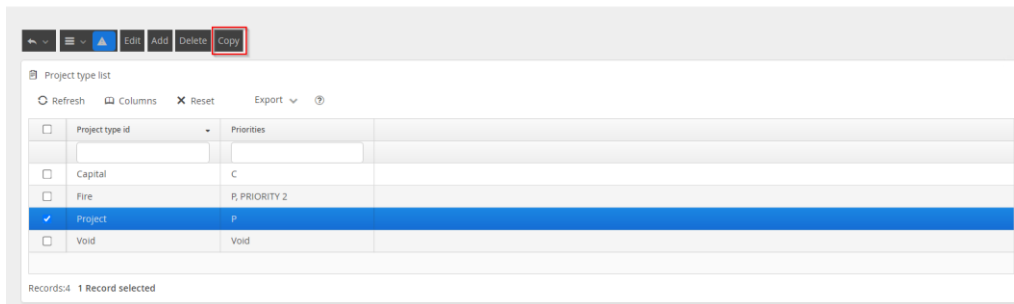


Once you have made your changes, click Save.

Copy a Project Type

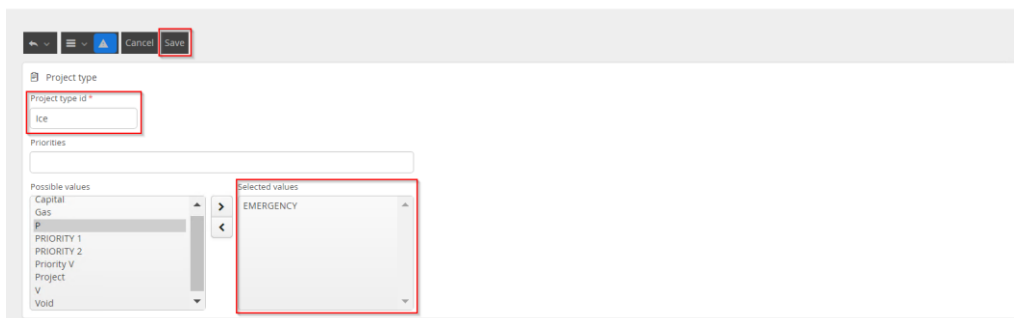
Project Types can be copied to save on configuration effort. Select your Project Type and click Copy.

Project type list



Create a unique Project Type ID and amend your required Priorities.

Project type

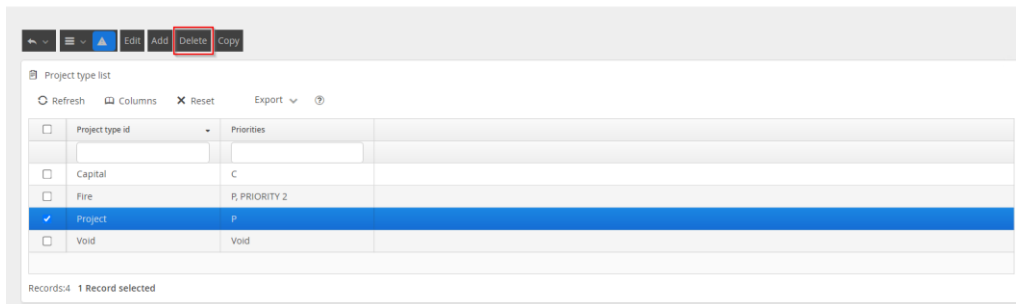


Then click Save.

Delete a Project Type

To Delete a Project Type, select your Project Type from the list and select Delete.

Project type list



Confirm the deletion and it will be removed from your possible options.

Configuring Teams

Teams can be used to assign groups of operatives to a Project, allowing Project Planner to allocate work to a dedicated group of resources before allocating work to operatives outside of the selected Team(s).

To configure Teams, access the TEAMS menu in the Project Planner configuration menu.

Teams

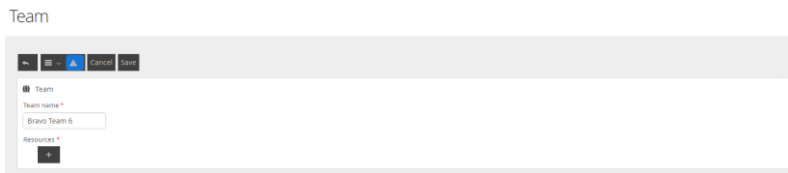


The screenshot displays a web-based interface for managing teams. At the top, there is a toolbar with buttons for 'Edit', 'Add', 'Delete', and 'Copy'. Below the toolbar, the title 'Teams' is followed by a set of controls including 'Refresh', 'Columns', 'Reset', and 'Export'. The main content is a table with two columns: 'Name' and 'Resources'. The table contains four rows of data, each with a checkbox in the first column. The 'Resources' column contains text truncated with ellipses. At the bottom left of the table area, it says 'Records:4'.

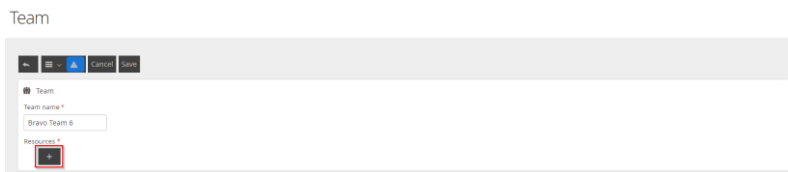
<input type="checkbox"/>	Name	Resources
<input type="checkbox"/>	Fire Door Survey	Fire Inspector 2 (W1206)
<input type="checkbox"/>	Team 1	Fire Inspector 3 (W1307), Fire...
<input type="checkbox"/>	Test Team 1	Karen Rahm (CBC-100), Justl...
<input type="checkbox"/>	VOIDS	Ian Inspector (W1133), Charli...

Add a Team

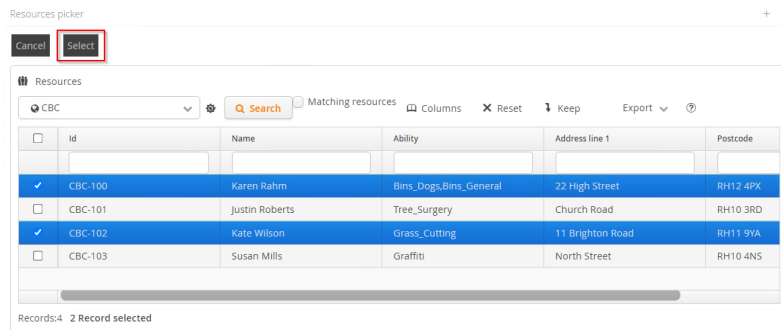
You can Add a new Team by clicking the Add button and begin by naming your Team.



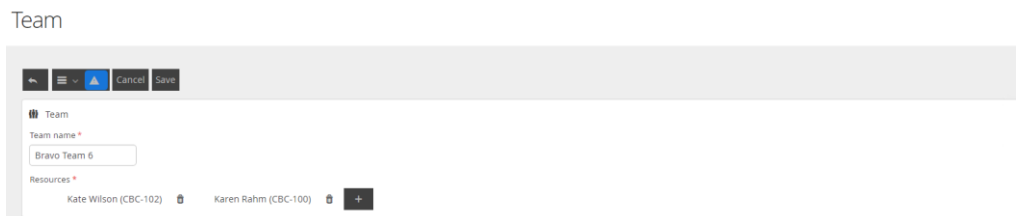
Select your required resources by clicking the + button



And checking the required resources. Once done, click Select.



Your selected resources will be added to your new Team.



When your changes are complete, click Save.

Team



Team

Team name *

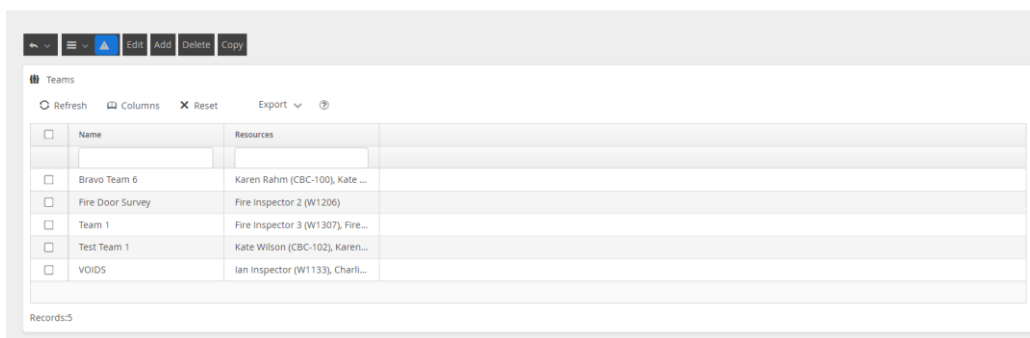
Bravo Team 6

Resources *

Kate Wilson (CBC-102) Karen Rahm (CBC-100)

Your team will be added to the team list.

Teams



Teams

Refresh Columns Reset Export

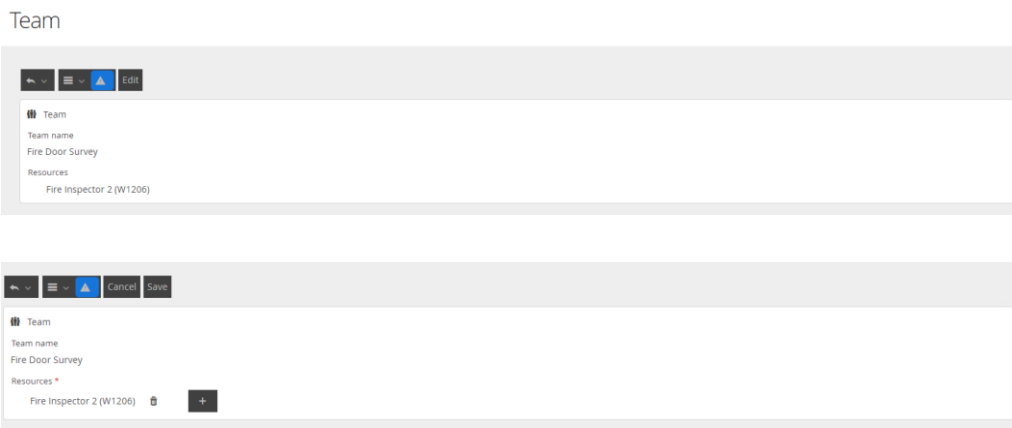
<input type="checkbox"/>	Name	Resources
<input type="checkbox"/>	Bravo Team 6	Karen Rahm (CBC-100), Kate ...
<input type="checkbox"/>	Fire Door Survey	Fire Inspector 2 (W1206)
<input type="checkbox"/>	Team 1	Fire Inspector 3 (W1307), Fire...
<input type="checkbox"/>	Test Team 1	Kate Wilson (CBC-102), Karen...
<input type="checkbox"/>	VOIDS	Ian Inspector (W1133), Charl...

Records:5

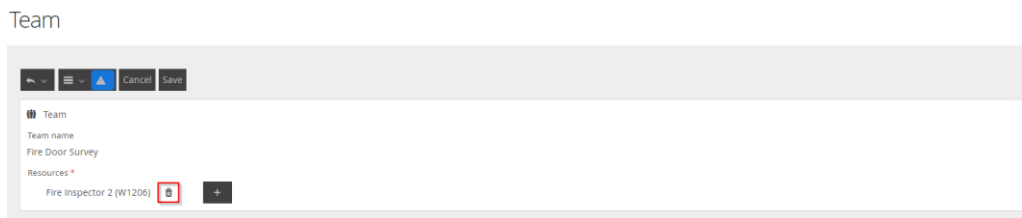
Edit a Team

You can edit an existing team by checking the Team and clicking Edit.

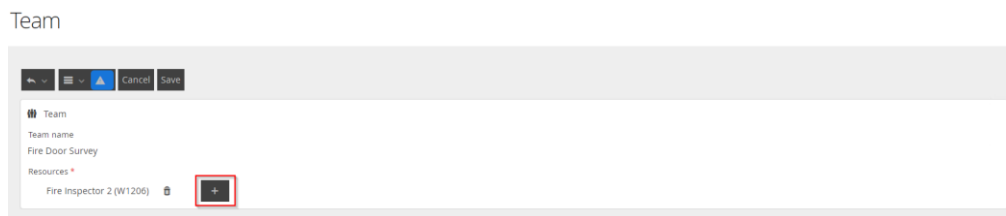
You can also Edit an existing team by clicking on the Team name and then clicking Edit.



To remove a resource, click the Trash Can.



To add a resource, click the + button and select the required operatives from the presented list and click Select.



Resources picker

Cancel Select

Resources

CBC Search Matching resources Columns Reset Keep Export ?

<input type="checkbox"/>	Id	Name	Ability	Address line 1	Postcode
<input checked="" type="checkbox"/>	CBC-100	Karen Rahm	Bins_Dogs,Bins_General	22 High Street	RH12 4PX
<input type="checkbox"/>	CBC-101	Justin Roberts	Tree_Surgery	Church Road	RH10 3RD
<input checked="" type="checkbox"/>	CBC-102	Kate Wilson	Grass_Cutting	11 Brighton Road	RH11 9YA
<input type="checkbox"/>	CBC-103	Susan Mills	Graffiti	North Street	RH10 4NS

Records:4 2 Record selected

Your selected resources will be added to the list.

Team

Cancel Save

Team

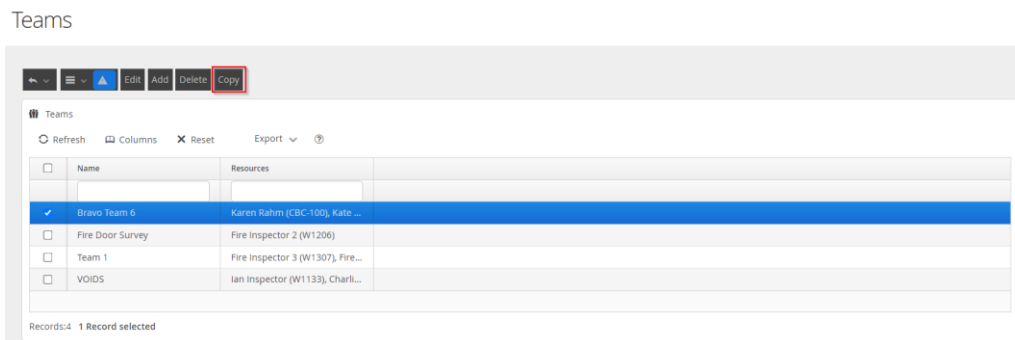
Team name
Fire Door Survey

Resources*

Fire Inspector 2 (W1206) Kate Wilson (CBC-102) Karen Rahm (CBC-100) +

Copy a Team

To copy a Team, select it from the Teams List and click Copy.

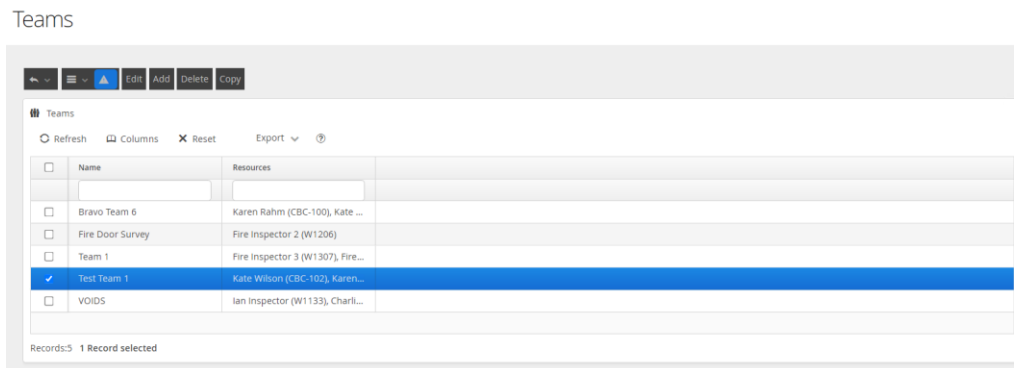


Give the team a new name and make any required edits. Once complete, click Save.

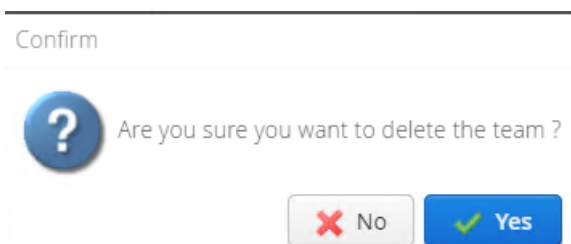


Delete a Team

To delete a team, select it from the Teams list, and click Delete.

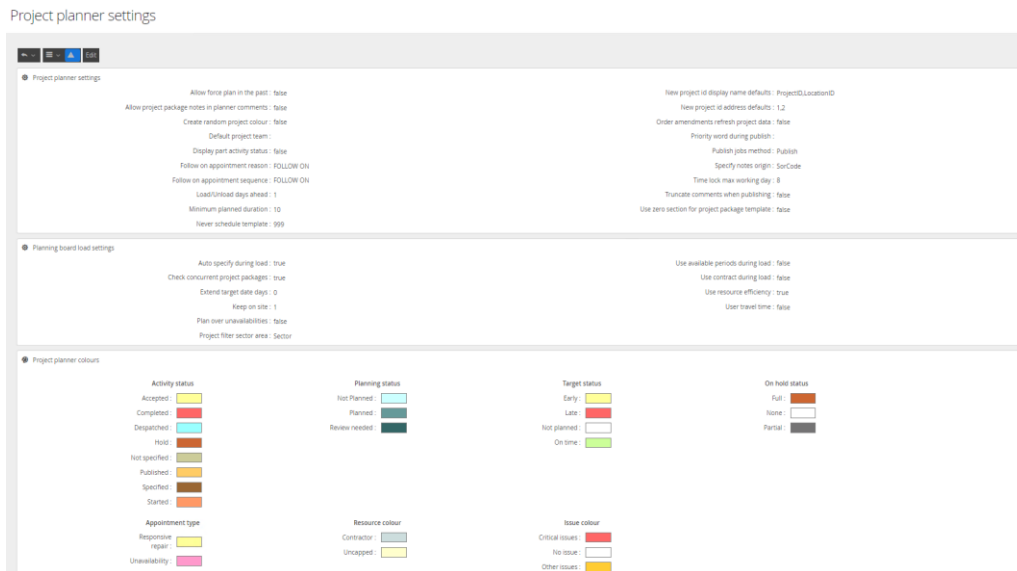


Confirm the deletion and it will be removed from your possible options.



Settings

Project Planner configuration can be completed via the UI using the Settings option under the Project Planner menu within the Configuration Menu



Project Planner Settings

The settings in this section determine how Project Planner functions and the core settings which will govern its use. Below is a description of each setting, though hovering over any individual setting will display a tooltip to the user.

Setting Name	Description	Default Value	Possible Values
Allow force plan in the past	Allow projects to be force planned into the past	FALSE	TRUE,FALSE
Allow Project Package notes in planner comments	Project package comments will be transposed into Planner Comments on publish	FALSE	TRUE,FALSE
Create random Project colour	The Project colour will be assigned randomly on create	FALSE	TRUE,FALSE
Default Project Team	The default team that will be assigned to the Project on create	<BLANK>	Any configured Team Name
Display Part Activity Status	The Activity Status for the Project will show PART if the Project is not fully specified or published.	FALSE	TRUE,FALSE
Follow On Appointment Reason	This will be the default reason applied when creating a follow on.	FOLLOW ON	Appointment Reason Object Values
Follow on Appointment Sequence	This will be the default sequence applied when creating a follow on.	FOLLOW ON	Appointment Sequence Object Values
Load/Unload days ahead	This value will determine how far ahead we will load or unload projects. 0 will load everything. 1 will load tomorrow. 2 will load 2 days ahead etc.	1	> 0

Minimum planned duration	If a Project package duration is set to less than this value, this value will be applied to the duration.	10	> 1
Never schedule template	This template will be applied to SOR's which are not configured as part of the Project Planner SOR Templates	999	Any configured Template
New Project ID display name default	This will be the Name of projects derived on the Project Create	ProjectID, LocationID	Comma Delimited value derived from: ProjectID, LocationID, Address1, Address2, Address3, Address4, PostCode
New Project ID Address default	This will the Address displayed on the project on the Project Create	1,2	Comma Delimited value indicating the Address Lines which will be used to define the address: 1,2,3,4
Order amendments refresh Project data	If True, on processing an Order Amendment, Project Planner will unload the Project, process the Amendment and then attempt to reload the Project.	FALSE	TRUE,FALSE
Priority word during publish	If configured, this word will be suffixed to your PRIORITY value on the Project when publishing jobs	<BLANK>	Any single word
Publish Jobs method	Publish will allow jobs to be published normally through Project Planner, PULL will allow Mobile Gateway to request jobs from Project Planner on demand.	Publish	Publish, PUSH

Specify notes origin	When specifying a Project, the Project Notes can either come from the Sor Code, or the Project Notes	Sor Code	Sor Code, Project
Time Lock max working day	This parameter determines the longest duration that can be assigned to a Project Package when Time Locking it	8	0-24
Truncate comments when publishing	This parameter will ensure that any Project Comments that exceed 250 characters will be truncated when publishing to DRS diary appointments	FALSE	TRUE,FALSE
Use zero for Project package template	This parameter resolves matching issues on SOR's when being loaded in through the Webservice Gateway. If you are experiencing issues whereby the SOR's are not being correctly matched to their Project Packages, changing this parameter can help.	FALSE	TRUE,FALSE

Planning Board Settings

Settings within this section help control items such as Loading and Scheduling. Below is a description of each setting, though hovering over any individual setting will display a tool-tip to the user.

Setting Name	Description	Default Value	Possible Values
Auto Specify during load	If True, when loading the planning board, Project Planner will specify any unspecified SOR's before loading the Project	TRUE	TRUE,FALSE
Check concurrent Project packages	This parameter controls whether Project Planner will use the concurrent Project package check when loading the planning board.	TRUE	TRUE,FALSE
Extend target date days	This parameter will add additional days to the target date if required during planning	0	> 0
Keep on site	If True, this will keep resources on site by filling space in between Project Packages with Unavailabilities	1	1, 0
Plan over Unavailabilities	This parameter will allow Project Planner to ignore Unavailabilities in the diary	FALSE	TRUE,FALSE
Project filter sector area	Use the Sector or Area value to match on scheduling when loading the planning board	Sector	Sector, Area, Neither
Use available periods during load	Use temporary availability periods when attempting to load the Project	FALSE	TRUE,FALSE
Use contract during load	Use the Contract value for resource selection during the load	FALSE	TRUE,FALSE

Use resource efficiency	Use Resource Efficiency when completing the load	TRUE	TRUE,FALSE
Use travel time	Use Travel Time when completing the load	FALSE	TRUE,FALSE

What are Templates?

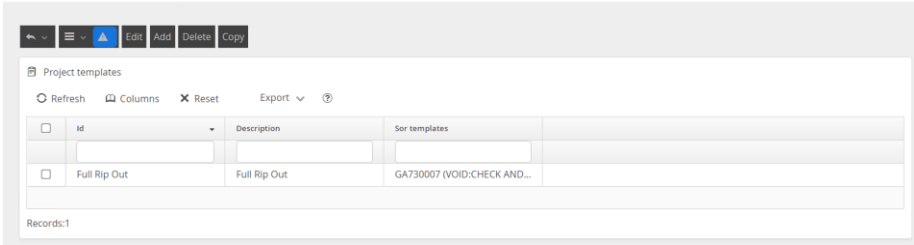
Project Planner Web uses Templates to model projects and control the schedule. This section explains each type of Template and how they would be implemented.

Project (formerly MODEL)

Project Templates can be used to Model larger projects from smaller sets of SOR's, or to allow for Projects to be created within Project Planner using a pre-defined set of SOR's.

This is commonly used with Stand Alone Project Planner. When used in conjunction with 3rd party integrators, this functionality may not respond as expected.

Project templates



The screenshot displays a web-based interface for managing project templates. At the top, there is a navigation bar with buttons for 'Edit', 'Add', 'Delete', and 'Copy'. Below this is a header section for 'Project templates' with options for 'Refresh', 'Columns', 'Reset', and 'Export'. The main area contains a table with the following data:

<input type="checkbox"/>	Id	Description	Sor templates
<input type="checkbox"/>	Full Rip Out	Full Rip Out	GA730007 (VOID:CHECK AND...

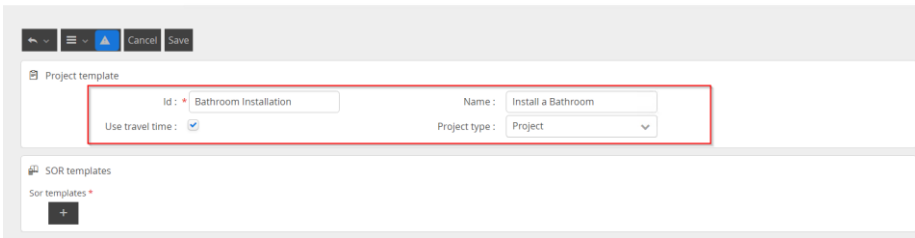
Records:1

Add a Project Template

Create a new Project Template by clicking the Add button.

Enter a Unique Template ID and Name descriptor. Select your Project Type and whether you would like to use Travel Time or not.

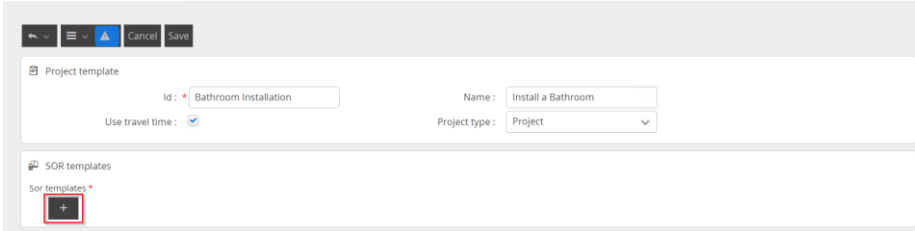
Project template



The screenshot shows a mobile application interface for creating a project template. At the top, there is a navigation bar with a back arrow, a menu icon, a blue triangle icon, and buttons for 'Cancel' and 'Save'. Below the navigation bar is a form titled 'Project template'. The form contains four input fields: 'Id' with the value 'Bathroom Installation', 'Name' with the value 'Install a Bathroom', 'Use travel time' with a checked checkbox, and 'Project type' with a dropdown menu set to 'Project'. A red rectangular box highlights these four fields. Below the form is a section titled 'SOR templates' with a sub-label 'Sor templates *' and a plus sign button.

Then click on the + button to select your SOR's from the SOR list picker. It is these SOR's that will be used to create your Project.

Project template



This screenshot is identical to the previous one, showing the 'Project template' form. However, a red rectangular box now highlights the plus sign button in the 'SOR templates' section, indicating the next step in the process.

Select your SOR's and click the Select button to confirm.

SOR list + x

Cancel **Select**

SOR templates

Refresh Columns X Reset Export

<input type="checkbox"/>	Id	Description	Default template	Job template	Duration (SM)
<input checked="" type="checkbox"/>	GA730007	VOID:CHECK AND TEST GAS I...	No	Void Gas Check	67
<input checked="" type="checkbox"/>	FD_SURVEY	Fire Door Survey	No	Fire Door Survey	10000
<input checked="" type="checkbox"/>	896001	TEST:UNOCCUPIED PROPERT...	No	Void Electrical Check	300
<input checked="" type="checkbox"/>	835003	ELECTRIC COOKER:RECONNE...	No	Void Electrical	25
<input type="checkbox"/>	630707	BASIN:DISCONNECT AND RE...	No	Void Plumbing	75
<input checked="" type="checkbox"/>	630705	BASIN:RENEW PEDESTAL ONLY	No	Void Plumbing	100
<input type="checkbox"/>	630508	REPAIR WASHING MACHINE	No	Void Plumbing	600
<input checked="" type="checkbox"/>	630501	WC SUITE:RENEW LOW LEVE...	No	Void Plumbing	308
<input type="checkbox"/>	444118	Kitchen Post Inspection	No	KITCHENPOSTINSPECTION	60
<input type="checkbox"/>	444117	Kitchen Clean	No	KITCHENCLEAN	90
<input type="checkbox"/>	444116	Kitchen 2nd Fix Electrical	No	KITCHEN2NDFIXELECTRICAL	180

Records:22 6 Record selected

Project template

Cancel Save

Project template

Id: Bathroom Installation Name: Install a Bathroom

Use travel time: Project type: Project

SOR templates

Sor templates: GA730007 FD_SURVEY 896001 835003 630705 630501 +

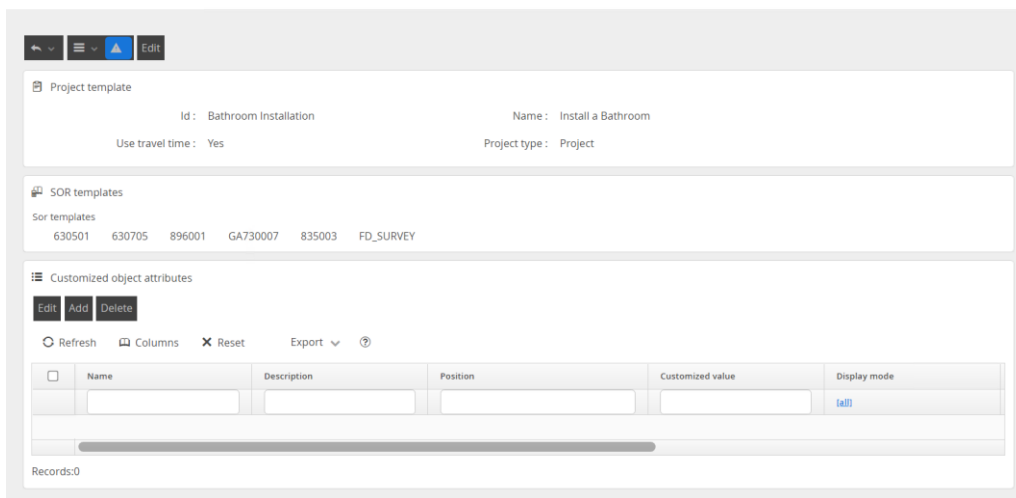
Once your selections are complete, click the Save button. You may be warned that your selected SOR's are configured within Project Packages. If you are happy with this, click Yes, and your Project Template will be saved.

Confirm

The following SOR templates are used in a project package template: GA730007, FD_SURVEY, 896001, 835003, 630705, 630501. Would you like to continue to save?

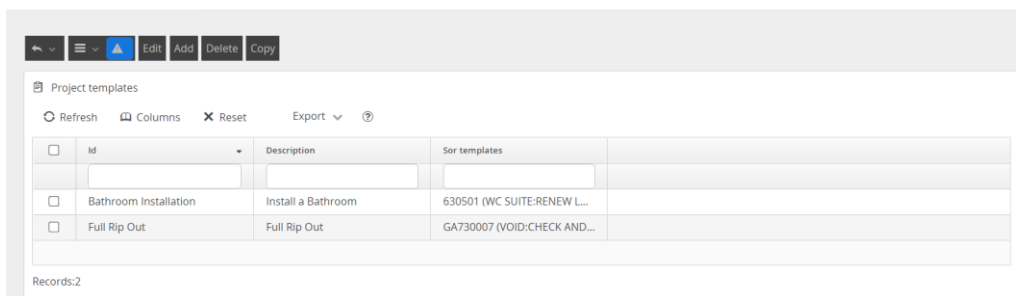
Project Templates can have their own customisable Object Attributes at this point. You can use this to control various default values to control your Project creation. Learn more about Customisable Object Attributes in your DRS V6 User Guide.

Project template



When your changes are complete, click the back button to see your Template in the list.

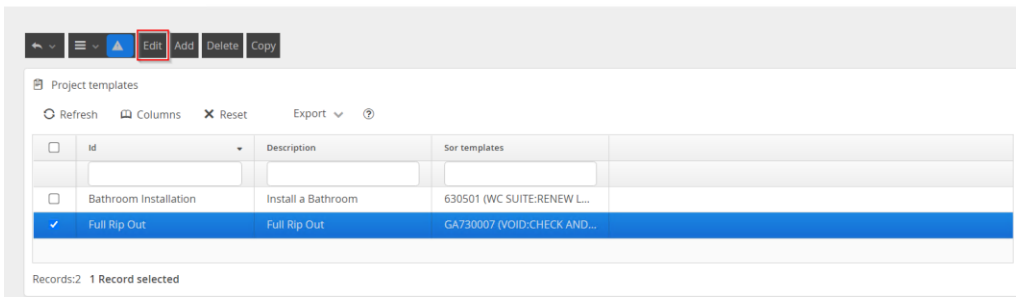
Project templates



Edit a Project Template

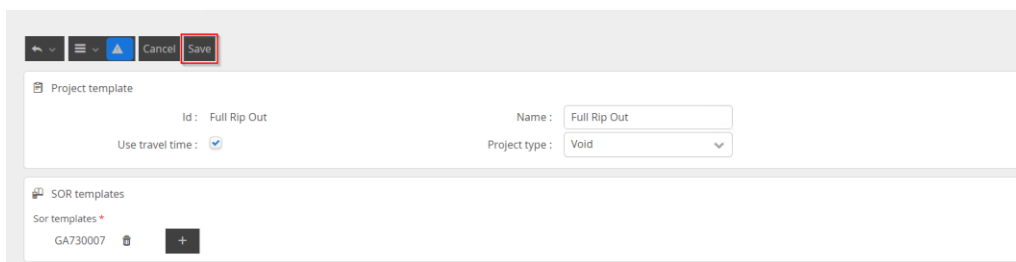
You can edit a Project Template by either clicking on the Template and then clicking Edit, or selecting your Project Template and clicking Edit.

Project templates



Within the Edit Screen, you can update the Name, Project Type, Travel Time and SOR's. When you've made your change, click Save.

Project template



Once your selections are complete, click the Save button. You may be warned that your selected SOR's are configured within Project Packages. If you are happy with this, click Yes, and your Project Template will be saved.

Confirm



The following SOR templates are used in a project package template: GA730007, FD_SURVEY, 896001, 835003, 630705, 630501. Would you like to continue to save?

Once saved, you can manage any Customised Object Attributes you have configured.

Project template

The screenshot shows a web-based configuration page for a 'Project template'. At the top, there is a navigation bar with a back arrow, a menu icon, an up arrow, and an 'Edit' button. Below this, the main content area is divided into three sections:

- Project template:** This section displays key attributes for the selected template: 'Id: Full Rip Out', 'Name: Full Rip Out', 'Use travel time: Yes', and 'Project type: Void'.
- SOR templates:** This section shows a list of SOR templates, with 'GA730007' selected.
- Customized object attributes:** This section contains a table for defining customized attributes. It includes buttons for 'Edit', 'Add', and 'Delete', and a toolbar with 'Refresh', 'Columns', 'Reset', and 'Export' options. The table has the following structure:

<input type="checkbox"/>	Name	Description	Position	Customized value	Display mode
<input type="checkbox"/>					[all]

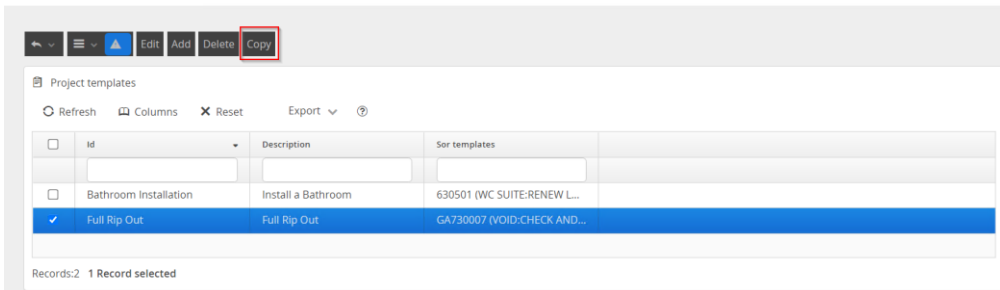
At the bottom left of the table area, it indicates 'Records:0'.

Clicking Back will take you back to your Project Template list.

Copy a Project Template

You can speed up template creation by using the Copy function. Select your template and then click Copy.

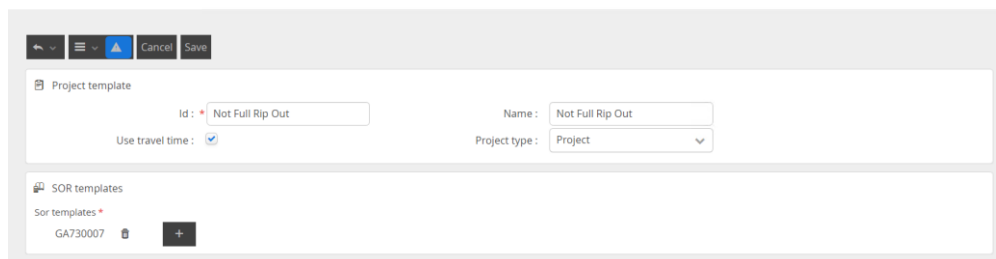
Project templates



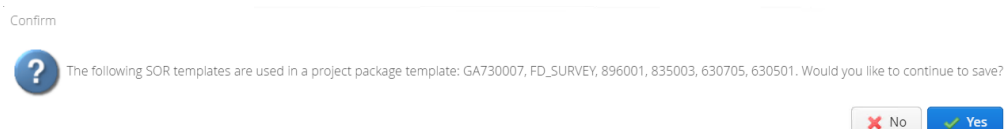
SOR's, Project Type and Travel Time configuration will be copied from your previous Project.

Configure your Unique ID and Name, make any changes to the settings as required and click Save.

Project template



Once your selections are complete, click the Save button. You may be warned that your selected SOR's are configured within Project Packages. If you are happy with this, click Yes, and your Project Template will be saved.



Project templates

The screenshot shows a web-based interface for managing project templates. At the top, there is a toolbar with buttons for 'Edit', 'Add', 'Delete', and 'Copy'. Below the toolbar, the title 'Project templates' is displayed. Underneath, there are several action buttons: 'Refresh', 'Columns', 'Reset', and 'Export'. The main content is a table with the following data:

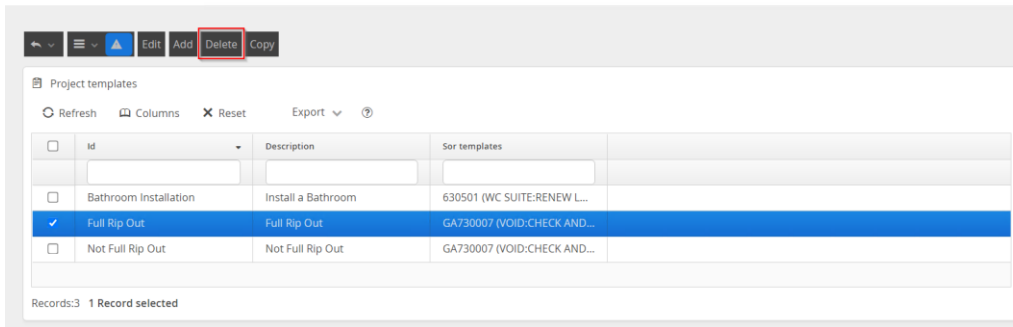
<input type="checkbox"/>	Id	Description	Sor templates
<input type="checkbox"/>			
<input type="checkbox"/>	Bathroom Installation	Install a Bathroom	630501 (WC SUITE:RENEW L...
<input type="checkbox"/>	Full Rip Out	Full Rip Out	GA730007 (VOID:CHECK AND...
<input type="checkbox"/>	Not Full Rip Out	Not Full Rip Out	GA730007 (VOID:CHECK AND...

Records:3

Delete a Project Template

To Delete a Project Template, select the Template to be deleted and click Delete.

Project templates



The screenshot shows a table with the following data:

<input type="checkbox"/>	Id	Description	Sort templates
<input type="checkbox"/>	Bathroom Installation	Install a Bathroom	630501 (WC SUITE:RENEW L...
<input checked="" type="checkbox"/>	Full Rip Out	Full Rip Out	GA730007 (VOID:CHECK AND...
<input type="checkbox"/>	Not Full Rip Out	Not Full Rip Out	GA730007 (VOID:CHECK AND...

Records:3 1 Record selected

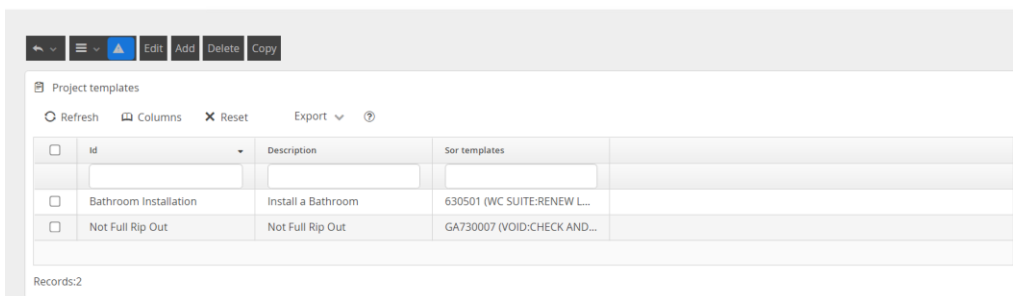
Confirm the delete and it will be removed. Note, this cannot be reversed.

Confirm



Are you sure you want to delete the project template ?

Project templates



The screenshot shows the table after deletion:

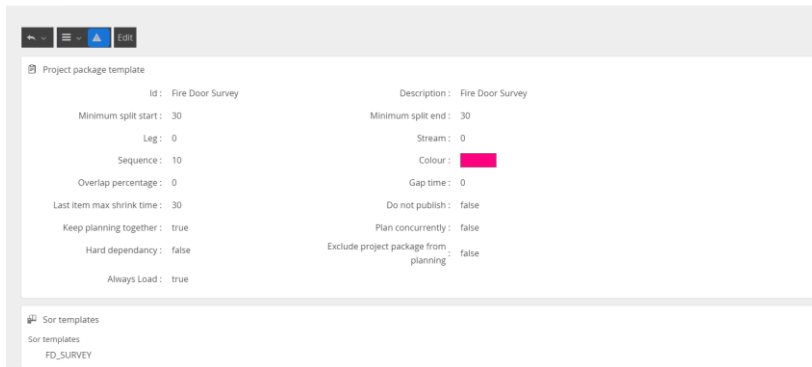
<input type="checkbox"/>	Id	Description	Sort templates
<input type="checkbox"/>	Bathroom Installation	Install a Bathroom	630501 (WC SUITE:RENEW L...
<input type="checkbox"/>	Not Full Rip Out	Not Full Rip Out	GA730007 (VOID:CHECK AND...

Records:2

Project Package (formerly Work Package)

Project Packages are the way Project Planner organised your SOR's into chunks of work for your resources to complete. This is a key component to your Project Planner configuration.

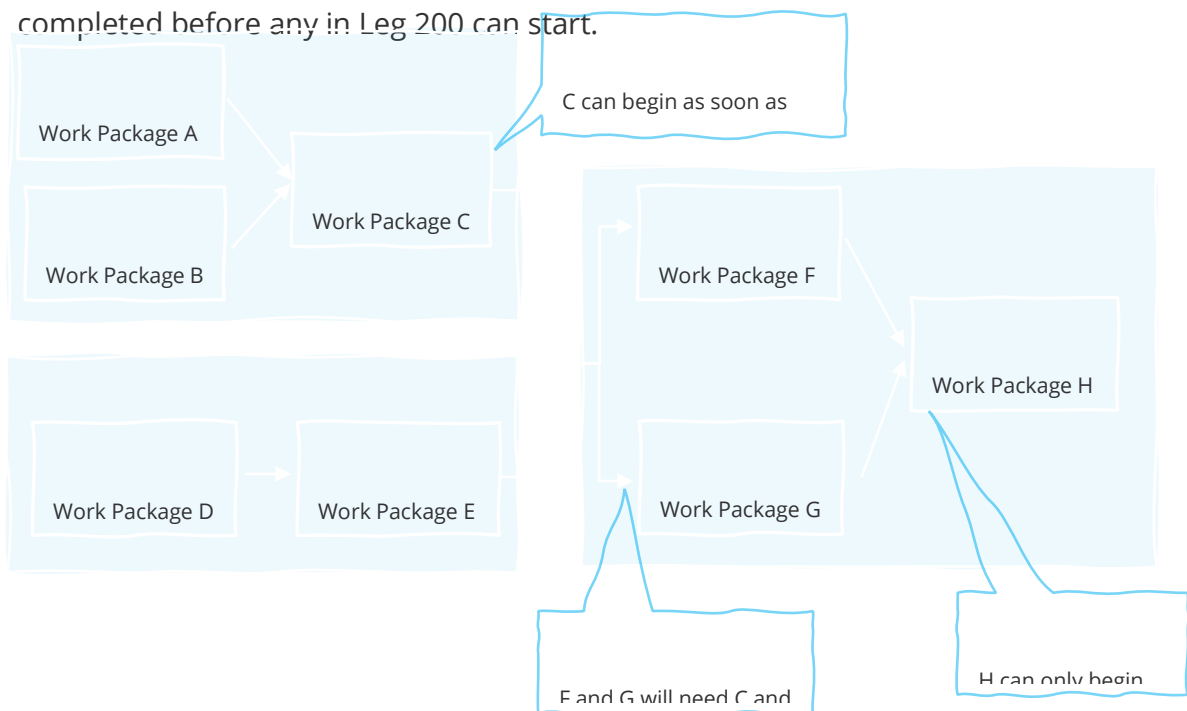
Project package template



Legs, Streams and Planning Sequence

Each Work Classification is assigned a default Leg, Stream and Sequence, these fields are carried forward to all Project Packages for the Work Classification. Although logically separate, the fields are combined as LegStreamSequence to give a Planning Sequence when loading the Planning Board.

The default values for an individual Project Package may be changed within the Project Package Details screen, leg and stream are optional and default to zero. In the following example, all of the Project Packages in Leg 100 must be completed before any in Leg 200 can start.



Add/Edit a Project Package

When Adding or Editing a Project Package, the available fields and their use are the same. **While in Edit mode, the ID field will not be editable.**

Project package template

The screenshot shows a web form titled "Project package template". At the top, there are navigation buttons: a back arrow, a menu icon, a blue triangle icon, and buttons for "Cancel" and "Save". Below the title, the form contains several input fields and checkboxes:

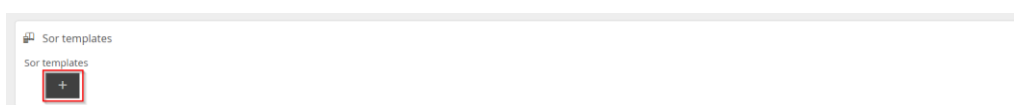
- Id:** A text input field with a red asterisk next to it.
- Minimum split start:** A numeric input field with the value "0".
- Leg:** A numeric input field with the value "0".
- Sequence:** A numeric input field with the value "0".
- Overlap percentage:** A numeric input field with the value "0".
- Last item max shrink time:** A numeric input field with the value "0".
- Keep planning together:** A checkbox with "Yes" selected and "No" as a link.
- Hard dependency:** A checkbox with "Yes" selected and "No" as a link.
- Always Load:** A checkbox with "Yes" selected and "No" as a link.
- Description:** A text input field.
- Minimum split end:** A numeric input field with the value "0".
- Stream:** A numeric input field with the value "0".
- Colour:** A color selection input field.
- Gap time:** A numeric input field with the value "0".
- Do not publish:** A checkbox with "Yes" selected and "No" as a link.
- Plan concurrently:** A checkbox with "Yes" selected and "No" as a link.
- Exclude project package from planning:** A checkbox with "Yes" selected and "No" as a link.

The available fields should be completed with the following detail.

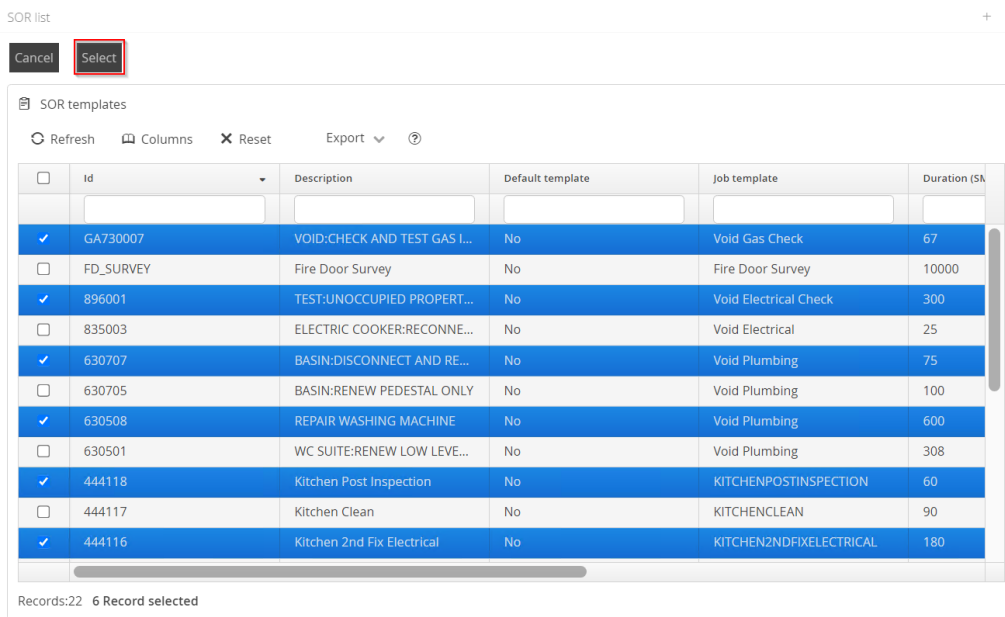
Parameter Name	Description	Possible Values
ID	Requires a Unique ID per Project Package	Alphanumeric String value
Description	A descriptor for the Project Package display	Alphanumeric String value
Minimum Split Start	This value will determine what the shortest amount of appointment time an operative can be scheduled to begin a Project Package.	Number > 0
Minimum Split End	This value will determine what the shortest amount of appointment time an operative can be scheduled to complete a Project Package.	Number > 0
Leg	The top level of the Scheduling Sequence	Number > 0
Stream	The mid level of the Scheduling Sequence	Number > 0
Sequence	The lowest level of the Scheduling Sequence	Number > 0

Colour	The selected colour will be applied to the COLOUR object in your planning views	Colour Wheel Selection
Overlap Percentage	The Project Package will be allowed to begin when the previous Package's loaded duration has reached the stated percentage	Number between 0 and 100
Gap Time	The Project Package will apply a gap of the set value (in minutes) from the end of the previously loaded Package before it begins	Number > 0
Last Item Max Shrink Time	If the last appointment created for a Project Package would be less than this value, it will be ignored	Number > 0
Do Not Publish	This will/not prevent the task from being published into the DRS diary	True/False
Keep planning together	Where possible this value will prevent Packages from being planned with gaps	True/False
Plan concurrently	This will engage the check to determine if Project Packages are planned concurrently with each other	True/False
Hard dependency	If this is checked, this Package will drop Packages lower in the sequence from being planned until it is complete	True/False
Exclude Project package from planning	If True, this will exclude the Package from being planned	True/False
Always Load	If True, this will ignore all above configuration and will always be loaded.	True/False

Assigning SOR's to your Project Packages is completed by clicking the + button.

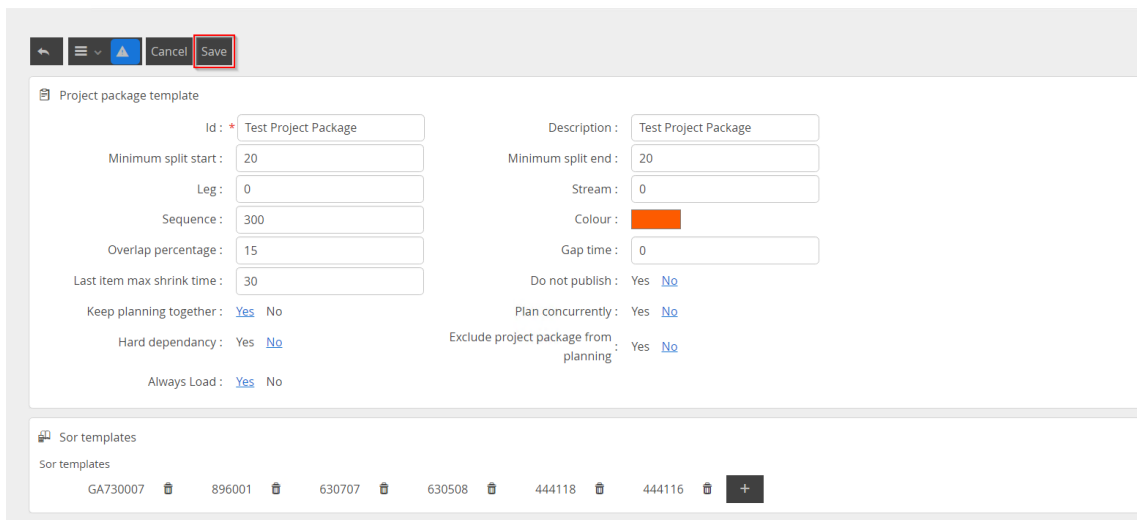


Check the appropriate SOR's and click Select



Once your selections are complete, click Save.

Project package template



If you have allocated SOR's to your Project Package which are already allocated to other Package's, you will be asked if you would like to reallocate the SOR's

Confirm



There are sor templates which are already assigned to other project package template. Do you want to update these with the current project package template?

Selecting Yes will allocate the SOR's to the new Project Package.

Project package template

Project package template

Id : Test Project Package Description : Test Project Package

Minimum split start : 20 Minimum split end : 20

Leg : 0 Stream : 0

Sequence : 300 Colour :

Overlap percentage : 15

Last item max shrink time : 30

Keep planning together : true Plan concurrently : false

Hard dependency : false Exclude project package from planning : false

Always Load : true

✔ The project package template has been saved. ✕

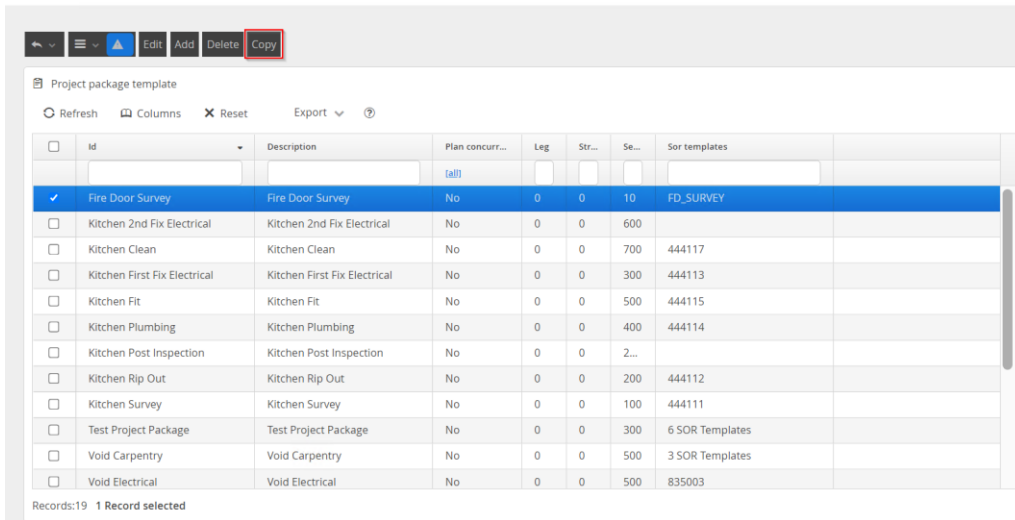
Sor templates

Sor templates
630707 896001 GA730007 444116 444118 630508

Copy a Project Package

Copy a Project Package by selecting the Package which you would like to copy and Click Copy

Project package templates



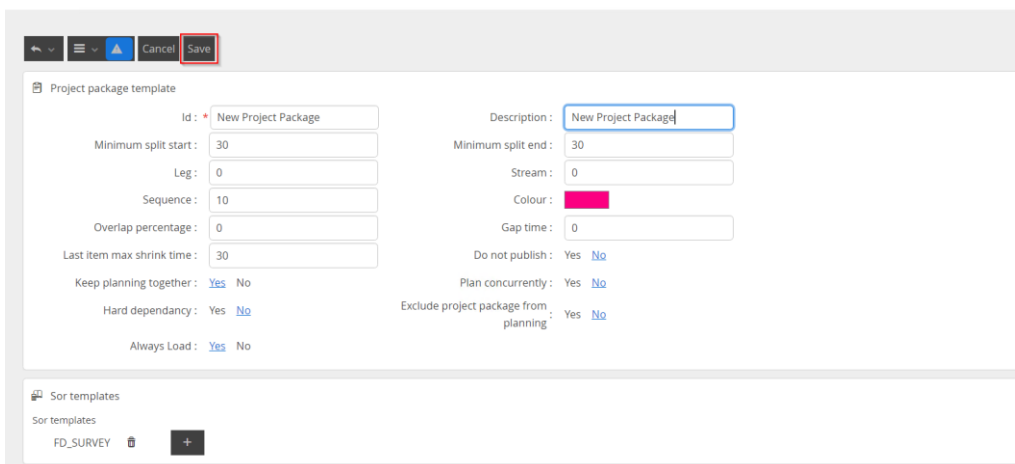
The screenshot shows a table of project package templates. The 'Copy' button in the top toolbar is highlighted with a red box. The table has columns for Id, Description, Plan concurr..., Leg, Str..., Se..., and Sor templates. The 'Fire Door Survey' row is selected.

<input type="checkbox"/>	Id	Description	Plan concurr...	Leg	Str...	Se...	Sor templates
<input checked="" type="checkbox"/>	Fire Door Survey	Fire Door Survey	No	0	0	10	FD_SURVEY
<input type="checkbox"/>	Kitchen 2nd Fix Electrical	Kitchen 2nd Fix Electrical	No	0	0	600	
<input type="checkbox"/>	Kitchen Clean	Kitchen Clean	No	0	0	700	444117
<input type="checkbox"/>	Kitchen First Fix Electrical	Kitchen First Fix Electrical	No	0	0	300	444113
<input type="checkbox"/>	Kitchen Fit	Kitchen Fit	No	0	0	500	444115
<input type="checkbox"/>	Kitchen Plumbing	Kitchen Plumbing	No	0	0	400	444114
<input type="checkbox"/>	Kitchen Post Inspection	Kitchen Post Inspection	No	0	0	2...	
<input type="checkbox"/>	Kitchen Rip Out	Kitchen Rip Out	No	0	0	200	444112
<input type="checkbox"/>	Kitchen Survey	Kitchen Survey	No	0	0	100	444111
<input type="checkbox"/>	Test Project Package	Test Project Package	No	0	0	300	6 SOR Templates
<input type="checkbox"/>	Void Carpentry	Void Carpentry	No	0	0	500	3 SOR Templates
<input type="checkbox"/>	Void Electrical	Void Electrical	No	0	0	500	835003

Records:19 1 Record selected

Update your required values, select the appropriate SOR's and click Save.

Project package template



The screenshot shows the edit form for a project package template. The 'Save' button in the top toolbar is highlighted with a red box. The form contains various input fields and checkboxes for configuration.

Id: * New Project Package
Description: New Project Package

Minimum split start: 30
Minimum split end: 30

Leg: 0
Stream: 0

Sequence: 10
Colour: [Red Box]

Overlap percentage: 0
Gap time: 0

Last item max shrink time: 30
Do not publish: Yes No

Keep planning together: Yes No
Plan concurrently: Yes No

Hard dependency: Yes No
Exclude project package from planning: Yes No

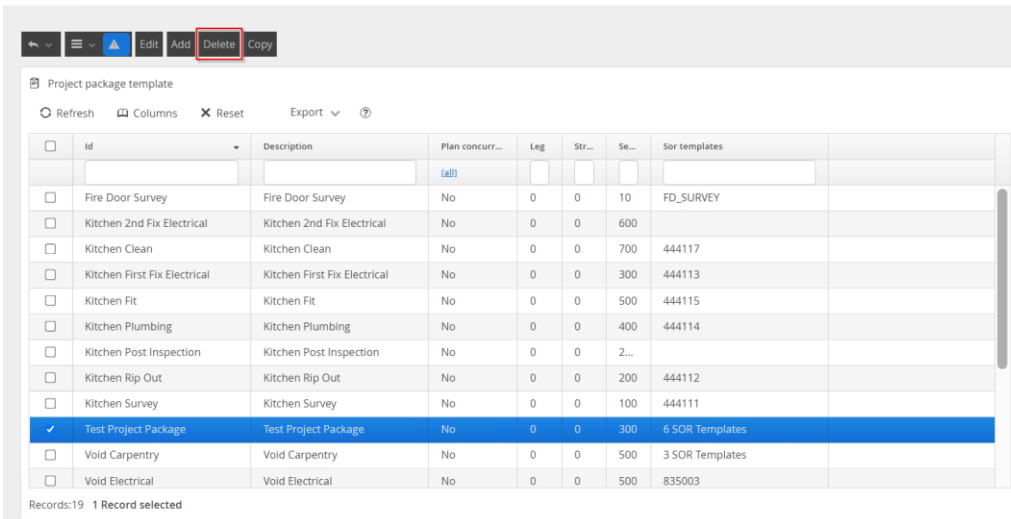
Always Load: Yes No

Sor templates
FD_SURVEY [Trash] [Add]

Delete a Project Package

Delete a Project Package by selecting the Package that must be deleted and click Delete.

Project package templates



<input type="checkbox"/>	Id	Description	Plan concurr...	Leg	Str...	Se...	Sor templates
<input type="checkbox"/>			fall				
<input type="checkbox"/>	Fire Door Survey	Fire Door Survey	No	0	0	10	FD_SURVEY
<input type="checkbox"/>	Kitchen 2nd Fix Electrical	Kitchen 2nd Fix Electrical	No	0	0	600	
<input type="checkbox"/>	Kitchen Clean	Kitchen Clean	No	0	0	700	444117
<input type="checkbox"/>	Kitchen First Fix Electrical	Kitchen First Fix Electrical	No	0	0	300	444113
<input type="checkbox"/>	Kitchen Fit	Kitchen Fit	No	0	0	500	444115
<input type="checkbox"/>	Kitchen Plumbing	Kitchen Plumbing	No	0	0	400	444114
<input type="checkbox"/>	Kitchen Post Inspection	Kitchen Post Inspection	No	0	0	2...	
<input type="checkbox"/>	Kitchen Rip Out	Kitchen Rip Out	No	0	0	200	444112
<input type="checkbox"/>	Kitchen Survey	Kitchen Survey	No	0	0	100	444111
<input checked="" type="checkbox"/>	Test Project Package	Test Project Package	No	0	0	300	6 SOR Templates
<input type="checkbox"/>	Void Carpentry	Void Carpentry	No	0	0	500	3 SOR Templates
<input type="checkbox"/>	Void Electrical	Void Electrical	No	0	0	500	835003

Records:19 1 Record selected

Confirm the Delete by clicking Yes.

Confirm

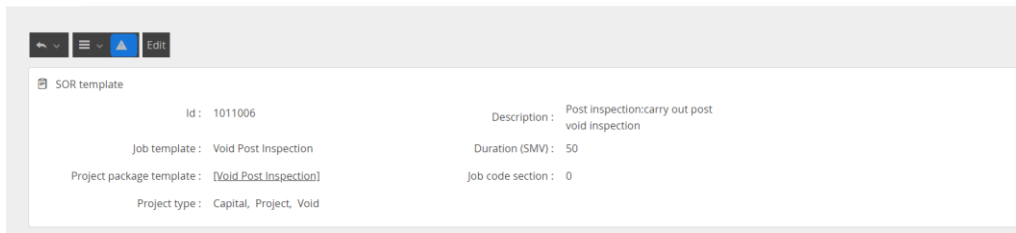


Are you sure you want to delete the project package template(s)?

SOR Templates (Formerly Work Items)

SOR's are the identified tasks for the Projects. SOR's to be raised for your Projects must be configured within Project Planner before a Project is created to ensure projects are planned correctly.

SOR template



Add or Edit an SOR

Adding and Editing an SOR are performed using the same screen. **NOTE: While Editing, the ID will not be editable.**

SOR template

The screenshot shows a form titled 'SOR template' with the following fields:

- Id:** A text input field with a red asterisk indicating it is required.
- Job template:** A dropdown menu with a red asterisk.
- Job code section:** A text input field.
- Description:** A text input field.
- Duration (SMV):** A text input field containing the value '0'.
- Project type:** A multi-select list with two columns: 'Possible values' and 'Selected values'. The 'Possible values' column contains 'Capital', 'Fire', 'Project', and 'Void'.

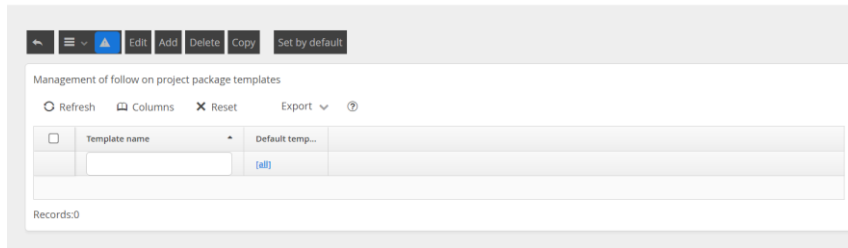
The available fields should be completed with the following detail.

Parameter Name	Description	Possible Values
ID	This will be your SOR Value	Alphanumeric String value
Description	This value will be your SOR Description	Alphanumeric String value
Project Package	The Project Package which the SOR is assigned to	Available Selection
Duration (SMV)	The default duration of the SOR	Number > 0
Job Code Section	This should always be 0, unless otherwise recommended	0
Project Type	Assign the appropriate Project Type from the available list	Available Selection

Follow On Templates

Follow On's for Project Planner can have their own custom Follow On Template configured to allow planners to quickly add additional time to the Project Packages quickly.

Follow on project package templates



Add or Edit a Follow On Template

Adding or Editing Follow On Templates is functionally similar to performing the same task for standard DRS. By clicking the Add or Edit button, you will be given the option to complete or edit values as required.

NOTE: When Editing, you will not be able to update the Name of the Follow On Template

Follow on project package template

Once you have added your Name and set the status transitions where Follow On's are possible from, you can add any Business Data defaults you would like.

Follow on project package template

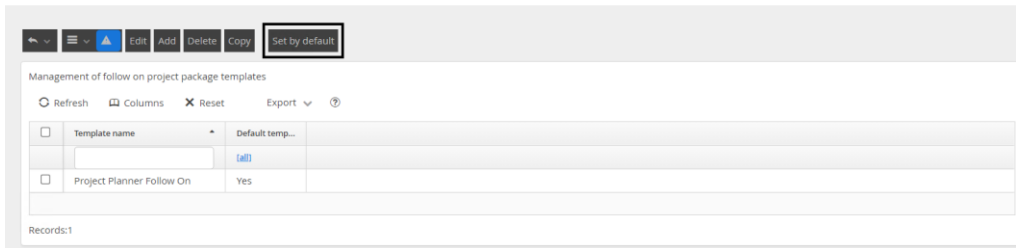
<input type="checkbox"/>	Name	Description	Data source	Customized value	Display mode
<input type="checkbox"/>	ORIGINAL_DURATION	ORIGINAL_DURATION	InheritedFromTemplate		Inherited
<input type="checkbox"/>	APPOINTMENT_REASON	APPOINTMENT_REASON	customized	PLANNER CHANGED	Inherited
<input type="checkbox"/>	PLANNER_COMMENTS	PLANNER_COMMENTS	fromParentWithPrefix		Inherited

Any Business Data items not included in the table below will be included in the Follow On screen in their default state.

Setting your Default Follow On Template

Once you have configured your Follow On Template, you can set this as your default by clicking the Set by Default button after checking the necessary template.

Follow on project package templates



This will set the default template used to create Follow Ons within Project Planner.

NOTE: Creating your default Follow On Template is required to use the Follow On functionality.

Security and Permissions

Project Planner Web access and functionality can be controlled globally through the Screens and Features area within DRS Configuration. The same security options can be found on the User Profile. You can either add permissions to existing User Profiles or create a new User Profile for your Project Planner Web users.

The security options control visibility and access for your users and are largely tied to the functionality.

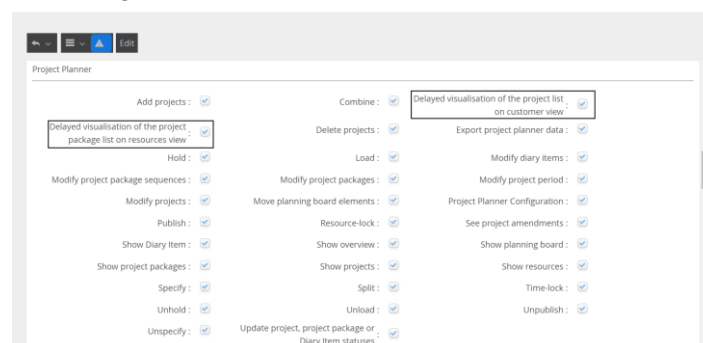
There are two options in the security which require further explanation are:

Delayed visualisation of the Project list on customer view:

Delayed visualisation of the Project package list on resources view:

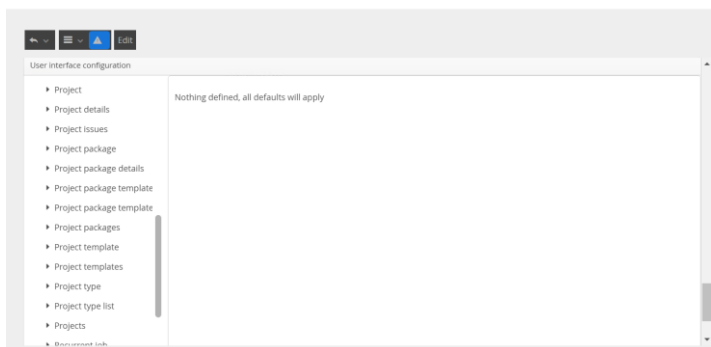
These two options, when selected, will set the Project sub list and Project Package sub list on the Worker object a Show List selectable link instead of immediately displaying the data within the sub list. This option will improve performance of reviewing Worker objects and does not restrict the ability to view Worker related assignment data.

Screen configuration



Control of the screen displays, and buttons can be achieved through the User Interface Configuration section of Screens and Features.

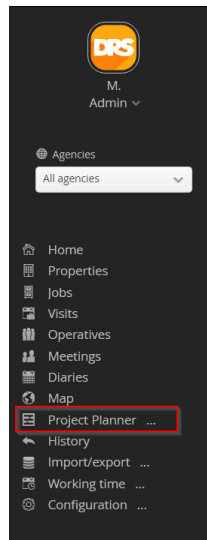
Screen configuration



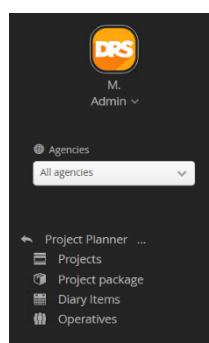
Menus and User Interface

The Project Planner Web interface is built directly within the DRS interface. Once the appropriate Licences have been applied, Project Planner will appear.

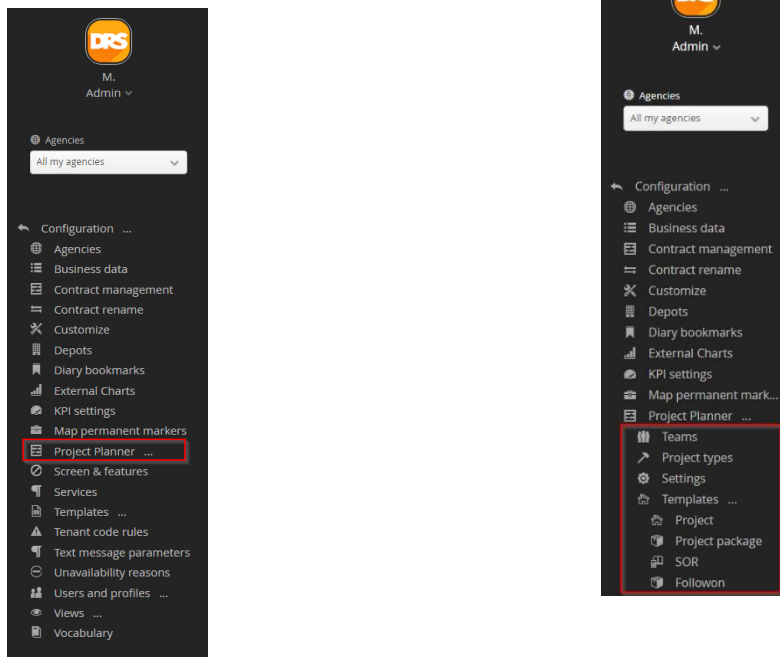
Under the Main Menu, you will have access to the Project Planner user menus.



Selecting this option will display the available Project Planner menus.



All configuration for Project Planner can now be completed in the User Interface within the Configuration Menu



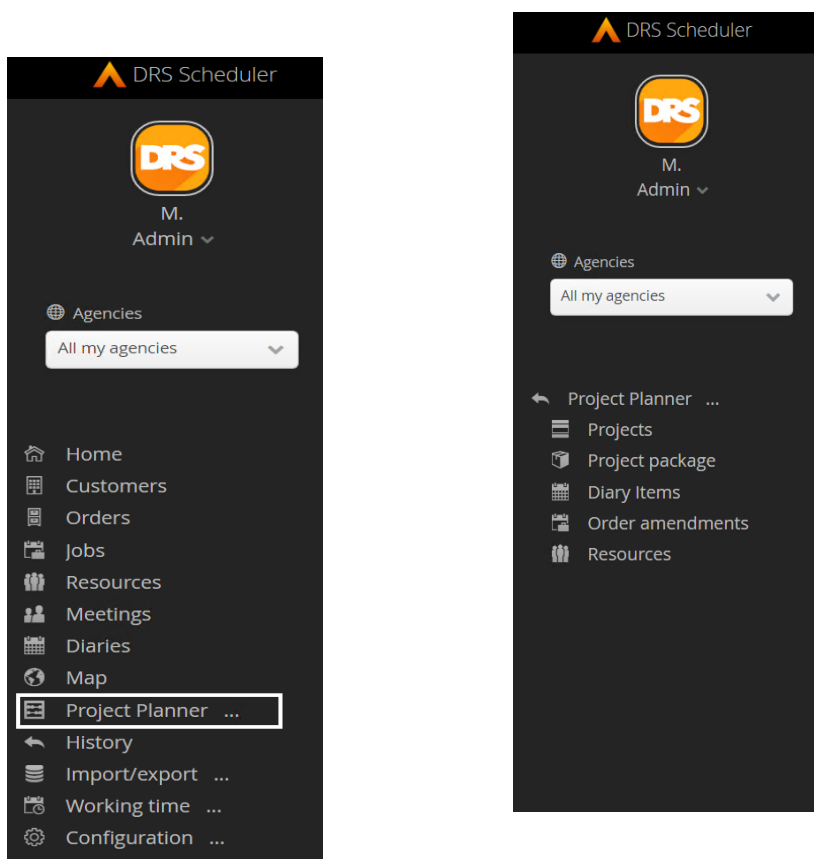
Expanding the configuration menu will allow you access to Project Types, Settings and Templates.

Explanation and description of these can be found in further sections of this document.

Planning with Project Planner Web

Using Project Planner Web is simple and intuitive. Many of the user interactions mirror the usage of standard DRS Scheduling.

Project Planner Web will be available from the DRS Main Menu if the appropriate Licences have been applied to your system, and User Permissions have been applied to your user account.



Projects: This menu option will display your Projects and their related Data

Project Package: This menu option will display your Project Packages and their related data.

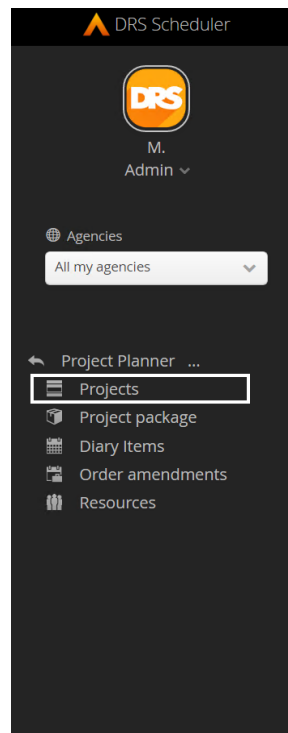
Diary Items: This menu item will display your available Diary Items. Diary Items will become Appointments within the DRS diaries after publishing your Project. Diary Items will not show DRS appointments in the View and vice versa

Order Amendments: This menu item will display the Order Amendments awaiting processing within your system.

Resources: This menu item will display the planning Resources available to Project Planner. Resource Views within Project Planner will not show Resources unavailable to Project Planner.

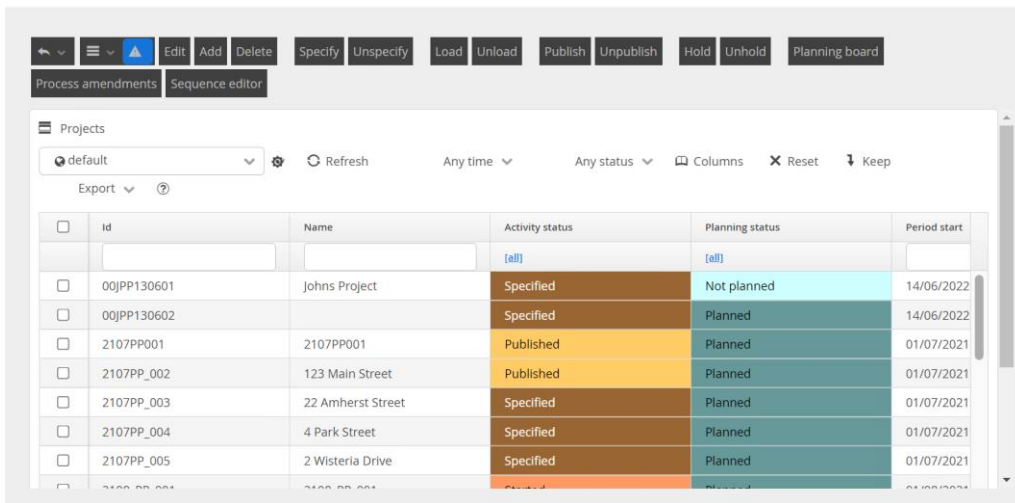
Projects

Accessing your Project detail within Project Planner Web is achieved by selecting the Projects menu option from within Project Planner.



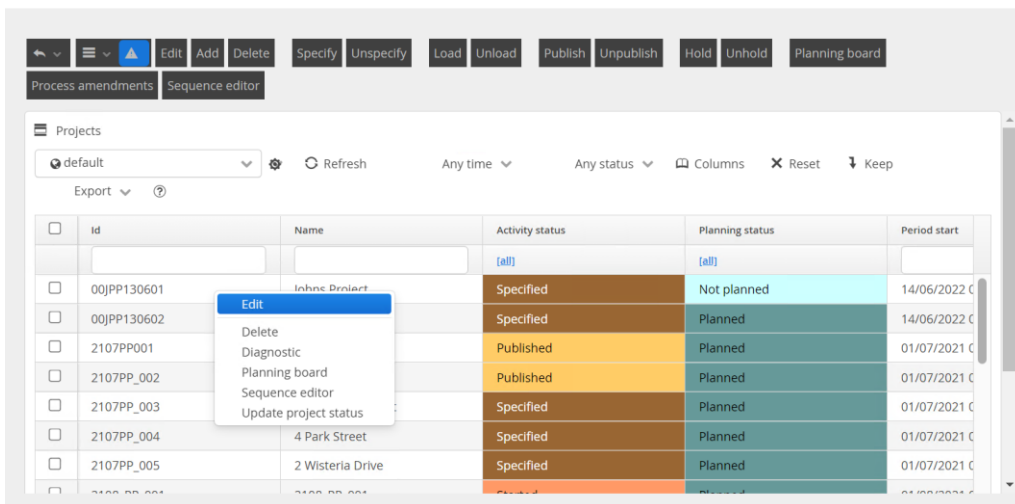
Your configured Projects View will be displayed in a standard DRS view. Navigating through the view and selecting data works in the same way as standard DRS.

Projects



Right clicking on any Project will offer you a context menu with some quick access options.

Projects



The available options, which will be discussed in more detail below, are available from within the Projects View.

Add: Add will allow you to create a new Project directly within Project Planner. You will be able to select your SOR's from your configured SOR Templates, or, select a Project Template which can apply the SOR's for you directly.

Edit: Edit will allow you to update, change and remove details about the Project, from within the Project details screen. There are some fixed fields which are created when the Project is created, which cannot be edited. This is by design.

Delete: Delete will permanently remove the Project from your Project Planner.

Specify: As discussed in the pre-amble, Specify will break your Project SOR's into specific Project Packages, ready for delivery.

Unspecify: Unspecify will remove any created Project Packages (which have not been started) and add the SOR's back onto the Project.

Load: Load will take your Specified Project Packages and Load them onto the Planning Board.

Unload: Unload will remove any Loaded Packages from your planning board.

Publish: Publish will send your selected Projects Diary Items to the DRS Diaries, ready to be requested by your Resources for delivery.

Unpublish: Unpublish will remove any published Diary Items which have not been started from DRS Diaries.

Hold: Hold will put your selected Project(s) on Hold.

Unhold: Unhold will remove any Hold's from your selected Project(s) and set them to a state which will allow for Project Packages to be scheduled again.

Planning Board: The Planning Board is where your Loaded and Planned projects can be reviewed visually.

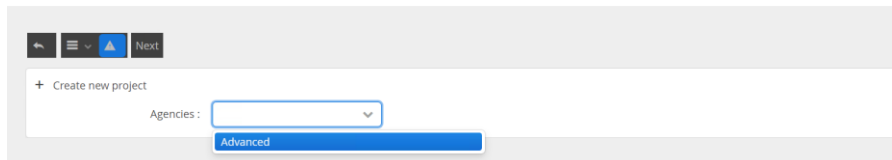
Process Amendments: Amendments can be passed from your Integrating system to update or change the in-flight projects. When provided, they will be listed in this menu and where possible, can be processed against your projects from this menu.

Sequence Editor: This is a new edition to Project Planner Web which can allow you to graphically manage the delivery of your Project through manipulating the order of the sequence scheduling.

Adding and Editing your Projects

When creating a new Project, clicking the Add button will allow you to select the appropriate Agency.

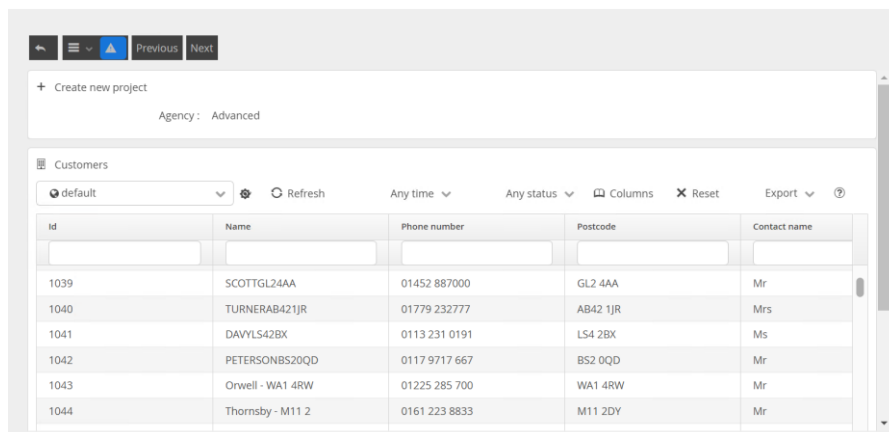
Project



The screenshot shows the 'Project' creation interface. At the top, there are navigation buttons: a back arrow, a menu icon, a blue 'Add' button, and a 'Next' button. Below this is a '+ Create new project' section. Underneath, the text 'Agency:' is followed by a dropdown menu. The dropdown menu is open, showing a blue bar with the text 'Advanced'.

You will then be asked to select a location;

Project

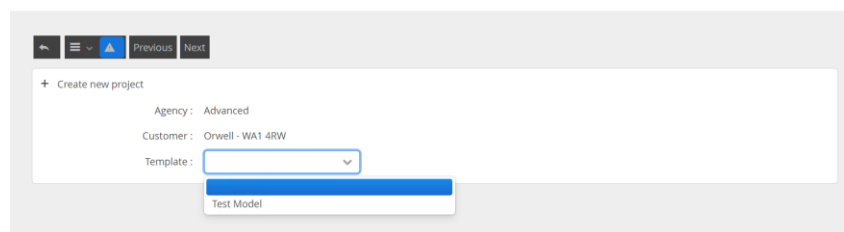


The screenshot shows the 'Project' creation interface with the 'Agency' dropdown set to 'Advanced'. Below this is a 'Customers' section. It features a search dropdown set to 'default', a 'Refresh' button, and filters for 'Any time', 'Any status', 'Columns', 'Reset', and 'Export'. A table lists several customer records with columns for Id, Name, Phone number, Postcode, and Contact name.

Id	Name	Phone number	Postcode	Contact name
1039	SCOTTGL24AA	01452 887000	GL2 4AA	Mr
1040	TURNERAB421JR	01779 232777	AB42 1JR	Mrs
1041	DAVYLS42BX	0113 231 0191	LS4 2BX	Ms
1042	PETERSONBS20QD	0117 9717 667	BS2 0QD	Mr
1043	Orwell - WA1 4RW	01225 285 700	WA1 4RW	Mr
1044	Thornsbys - M11 2	0161 223 8833	M11 2DY	Mr

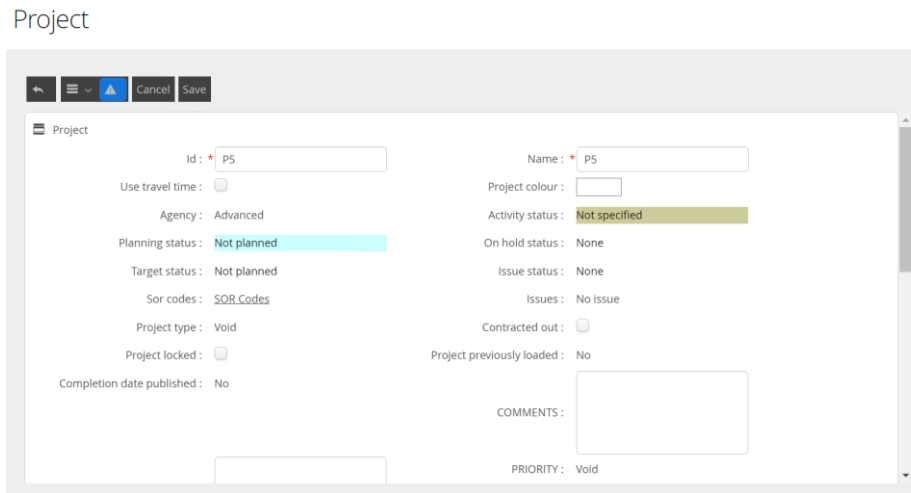
If you have configured Project Templates, you will be offered the option of selecting a Project Template. If you do not have Project Templates configured, or do not wish to use a Project Template, leave this option blank.

Project



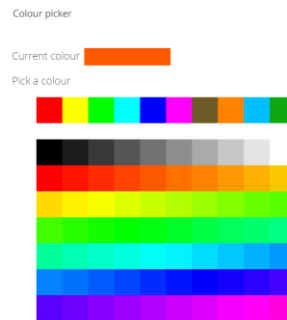
The screenshot shows the 'Project' creation interface. The 'Agency' is set to 'Advanced' and the 'Customer' is set to 'Orwell - WA1 4RW'. Below this, the text 'Template:' is followed by a dropdown menu. The dropdown menu is open, showing a blue bar with the text 'Test Model'.

Once selection is made, your Project will be displayed. If you have Edited a Project from the List, you will also see the following screen, although the ID will no longer be editable.



Set your ID and Project Name in the appropriate fields.

A Project colour can be set by clicking on the colour box and selecting from the colour swatch selector.



Travel time can also be enabled by checking the Use Travel Time box. Once checked, travel time will be added between Project Packages, (if required), for your resources.

Project Dates can be set via the Project Details Edit screen. These values can be set at the beginning of a Project and edited as required during the Project life cycle.

Project

← ☰ ▲ Cancel Save

Project periods

Project period : 02/09/2022 14:47 02/10/2022 14:47

Planned period : 02/09/2022 14:47 - 02/10/2022 14:47

Project dates

Contracted completion date : 00:00

Initial project period :

Viewing and Editing SOR's

Within the View Details and Edit Details screen, a link labelled SOR Codes can be clicked on to View or Edit the associated SOR's.

Project

The screenshot shows the 'Project' edit screen with the following fields and values:

- Id:** P5
- Name:** P5
- Use travel time:**
- Project colour:** Orange
- Agency:** Advanced
- Activity status:** Not specified
- Planning status:** Not planned
- On hold status:** None
- Target status:** Not planned
- Issue status:** None
- Sor codes:** SOR Codes (highlighted with a red box)
- Issues:** No issue
- Project type:** Void
- Contracted out:**
- Project locked:**
- Project previously loaded:** No
- Completion date published:** No
- COMMENTS:** (Empty text area)
- PRIORITY:** Void
- PLANNER_COMMENTS:** (Empty text area)

Within the Edit screen, you will be offered the opportunity to add in new SOR's. All SOR Codes listed in the upper box are SOR's currently attributed to the Project. SOR's below can be added by selecting the check box and clicking the **'Add'** button.

SOR list

Cancel Update

SOR Codes

SOR	Description	Trade	Cost	Quantity	Qty Used	Time Rem	SMV	Location	
630705	BASIN:RENEW PEDESTAL ONLY		0	1	0	0	100		
630707	BASIN:DISCONNECT AND REMOVE		0	1	0	0	75		
630501	WC SUITE:RENEW LOW LEVEL WITH PLASTIC CISTERN		0	1	0	0	308		

SOR Templates

Add

Refresh Columns Reset Export

<input type="checkbox"/>	SOR	Description	Job template	SMV	Service Requirement	Booking Type
<input type="checkbox"/>	342505	STOP:REFIX LOOSE DOOR SET	Void Carpentry	13	No	
<input type="checkbox"/>	896001	TEST:UNOCCUPIED PROPERT...	Void Electrical Check	300	No	
<input type="checkbox"/>	GA730007	VOID:CHECK AND TEST GAS I...	Void Gas Check	67	No	
<input type="checkbox"/>	390902	KEYSAFE: INSTALL KEYSAFE A...	Void Install Keysafe and Lock...	60	No	
<input type="checkbox"/>	1011006	Post Inspection:carry out pos...	Void Post Inspection	50	No	
<input type="checkbox"/>	1011007	Pre Inspection:carry out pre ...	Void Pre Inspection	50	No	

Any SOR's you add using this method will be given a default Quantity of 1 and will use the default configured SMV. You can edit these values within this screen. Once complete, click Update.

Use the Recycling Bin icon to remove any SOR's that are no longer required.

Project Location

Within the Project Details, the location will be visible at the bottom of the details pane.

📍 Address	
89 KINGSLAND GRANGE WOOLSTON WARRINGTON CHESHIRE WOOLSTON, WA1 4RW United Kingdom 53.40864618553598/-2.534043142786313	View Map
🏠 Customer details	
Customer Id : 1043	Template : default
Customer Name : Orwell - WA1 4RW	Phone Number : 01225 285 700

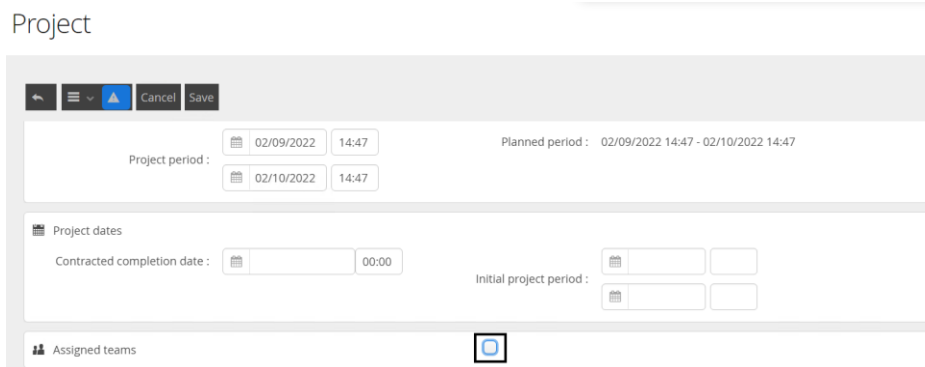
From here, you can navigate back to the core Customer Details, or view the location on the Map, by clicking View Map.

Adding Teams to your Project

Teams within Project Planner Web can be used to minimise the initial Resource pool selection when scheduling a Project. When Teams are applied to a Project, Project Planner will use the resources within the Team(s) that conform to the required Project Packages in its loading, before using Resources in the wider Resource group.

Enable Teams on your Project by checking the Assigned Teams box.

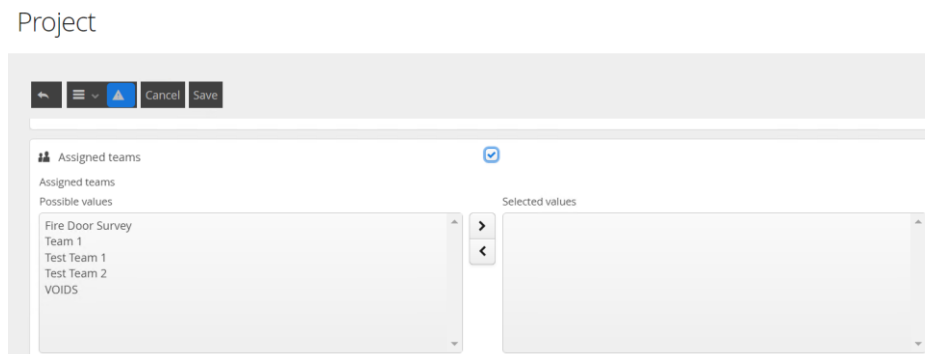
Project



The screenshot shows a 'Project' configuration form. At the top, there are navigation icons and buttons for 'Cancel' and 'Save'. Below this, the 'Project period' is set from 02/09/2022 14:47 to 02/10/2022 14:47, and the 'Planned period' is 02/09/2022 14:47 - 02/10/2022 14:47. The 'Project dates' section includes a 'Contracted completion date' of 00:00 and an 'Initial project period' with two empty date-time fields. At the bottom, the 'Assigned teams' checkbox is checked and highlighted with a red box.

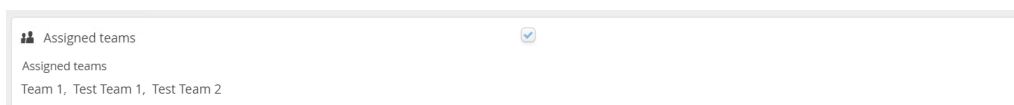
This will expand the Teams selection box which will allow you to allocate the required Teams to a Project.

Project



The screenshot shows the 'Assigned teams' section expanded. It features a 'Possible values' list on the left containing 'Fire Door Survey', 'Team 1', 'Test Team 1', 'Test Team 2', and 'VOIDS'. A 'Selected values' list on the right is currently empty. Navigation arrows (> and <) are positioned between the two lists. A blue checkmark icon is visible in the top right corner of the section.

Multiple Teams can be allocated to Projects. Project Planner will allocate resources to the Project Packages



The screenshot shows the 'Assigned teams' section with the checkbox checked. Below the checkbox, the text 'Assigned teams' is followed by a list of selected teams: 'Team 1, Test Team 1, Test Team 2'.

Resource allocation for Teams will be applied in the order for which they are allocated to the Project. If more than one team contains a resource that can deliver the required work within a Project Package, the resource within the first allocated team will be used.

Specifying your Project

Before you can Load your Project, you must Specify it. Specifying your Project will organise your SOR's into Project Packages.

To Specify your Project, from the Project list, select your Project(s) and click the Specify button.

Projects

The screenshot shows the 'Projects' interface. At the top, there is a toolbar with buttons: Edit, Add, Delete, Specify, Unspecify, Load, Unload, Publish, Unpublish, Hold, Unhold, and Planning board. Below the toolbar, there are tabs for 'Process amendments' and 'Sequence editor'. The main area displays a table with the following data:

Id	Name	Activity status	Planning status	Period start
P4	P4	Not specified	Not planned	11/08/2022 08:18
P5	P5	Not specified	Not planned	02/09/2022 14:47

At the bottom, it indicates 'Records:2 1 Record selected'.

Once complete the Activity Status will update to show 'Specified'

Projects

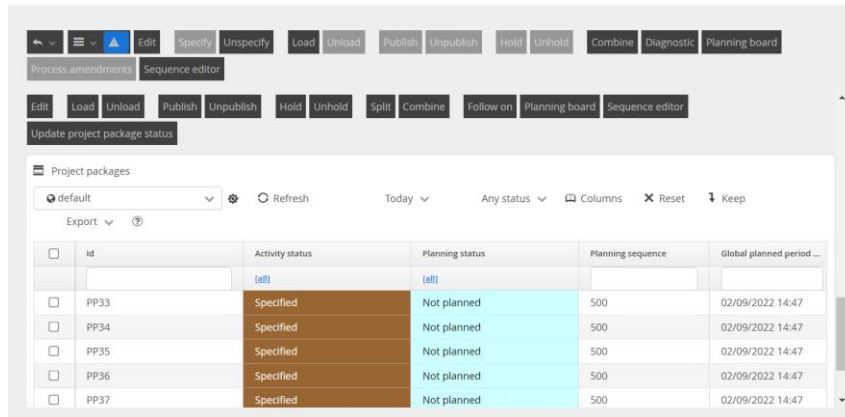
The screenshot shows the 'Projects' interface after the 'Specify' action. The table now shows:

Id	Name	Activity status	Planning status	Period start
P4	P4	Not specified	Not planned	11/08/2022 08:18
P5	P5	Specified	Not planned	02/09/2022 14:47

At the bottom, it indicates 'Records:2'.

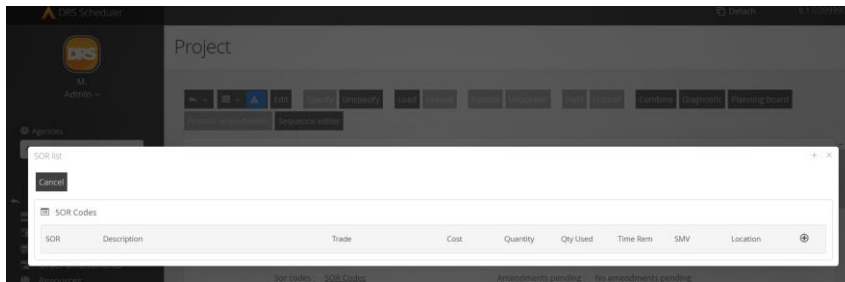
Clicking into the Project will allow you to review the Project Packages that have been created.

Project



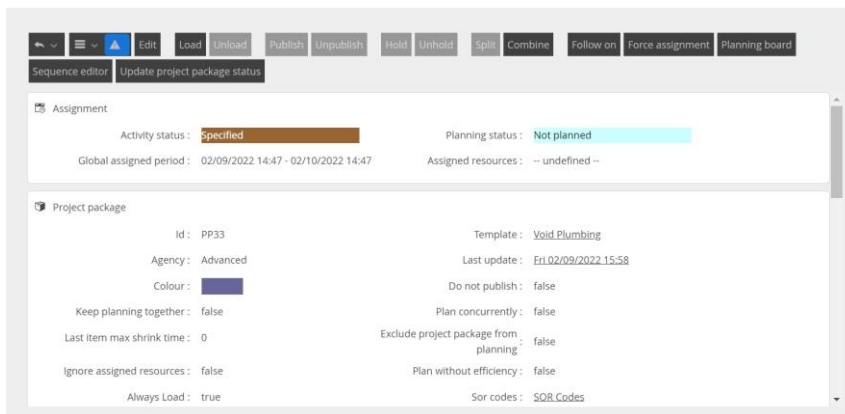
Depending on your configuration, you may need to click a link labelled 'Show Data' to display the created Project Packages.

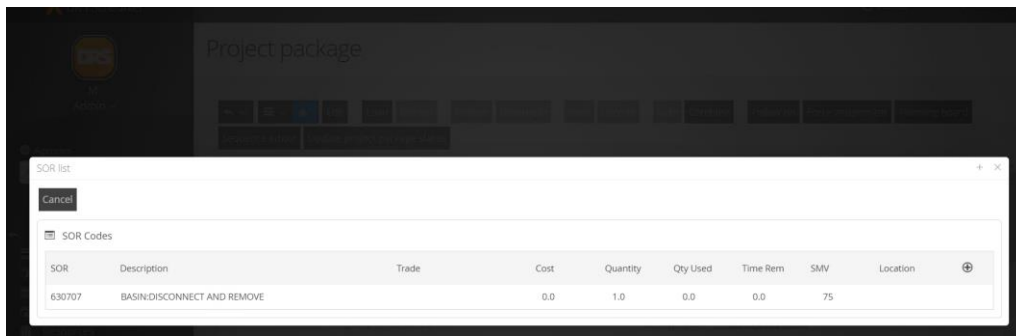
Once a Project is specified, SOR's will be deallocated from the Project and assigned to the specific Project Packages.



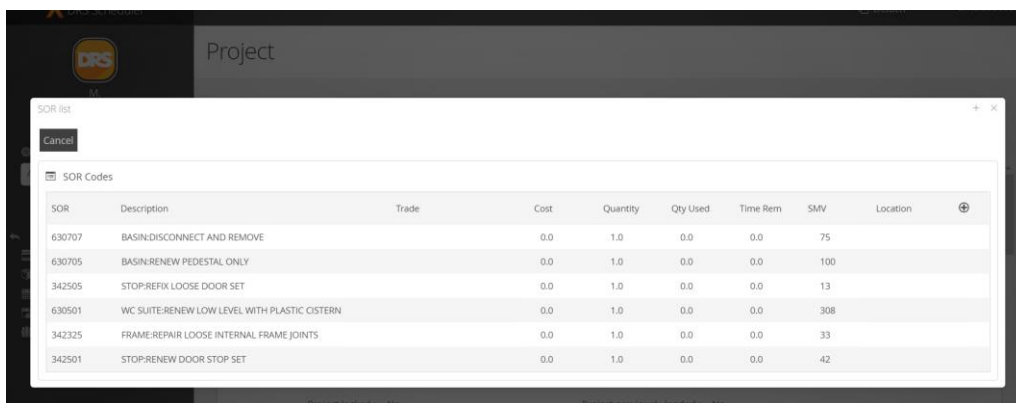
By clicking into any one of the displayed Project Packages, you can review the created Package and it's allocated SOR's.

Project package

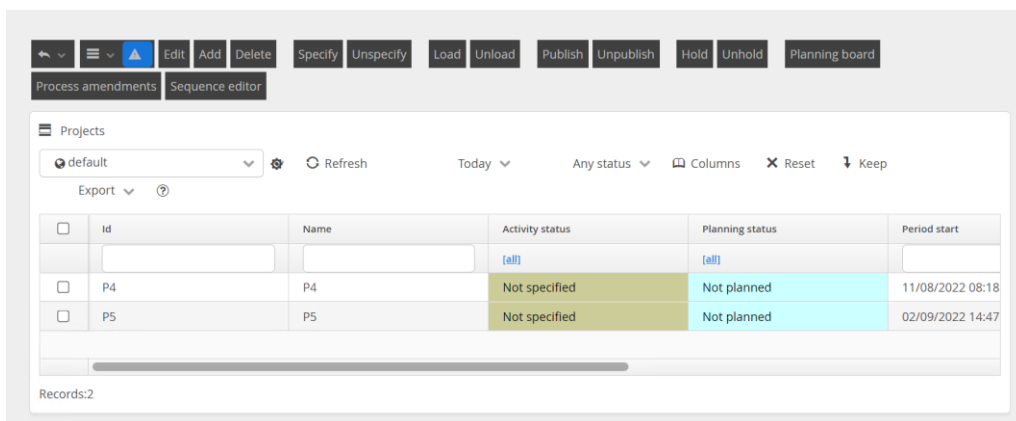




Using the Unspecify command at the Project Level will unspecify the Project, deallocating the SOR's from the Project Package and reallocating them to the Project. The Activity Status of the Project will also be set back to Not Specified.

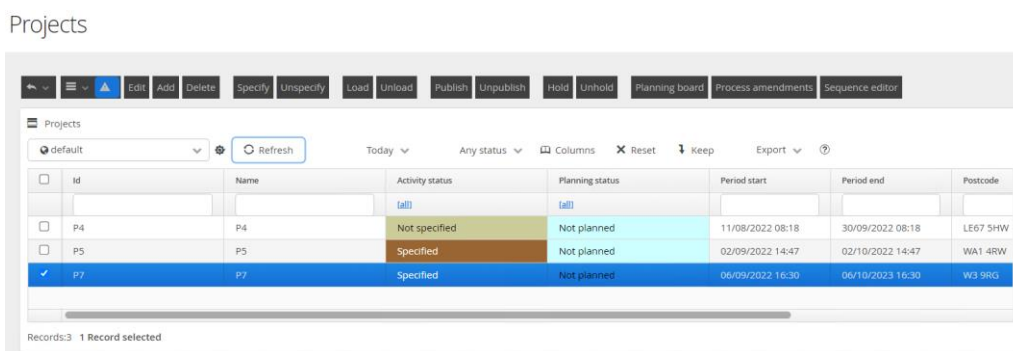


Projects

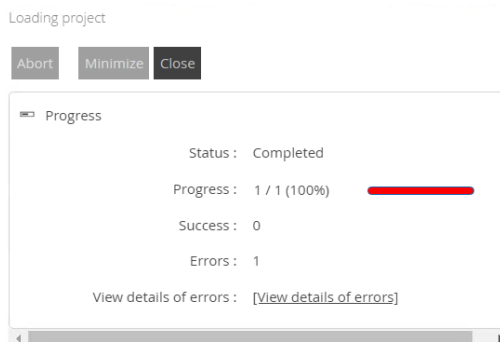


Loading your Projects onto the Planning Board

Loading Projects onto the Planning Board is the first step to creating a visualisation of the plan. Projects can be loaded from either the Project or the Project Package level. If loading from the Project Level, Project Planner Web will attempt to load each Project Package. Select your Project and click the Load button.

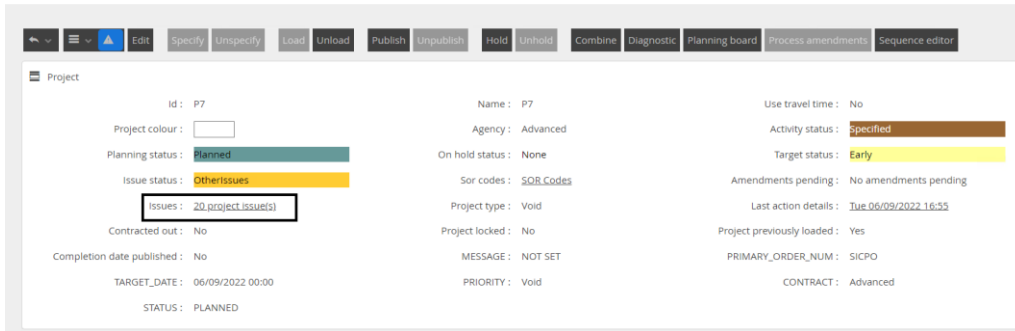


If Project Planner Web encounters any issues when attempting to load the Project, it will note it has encountered an error and provide a link.



If there are many issues, Project Planner Web will list all Loading issues against the Project itself. These can be accessed from within the Project Details.

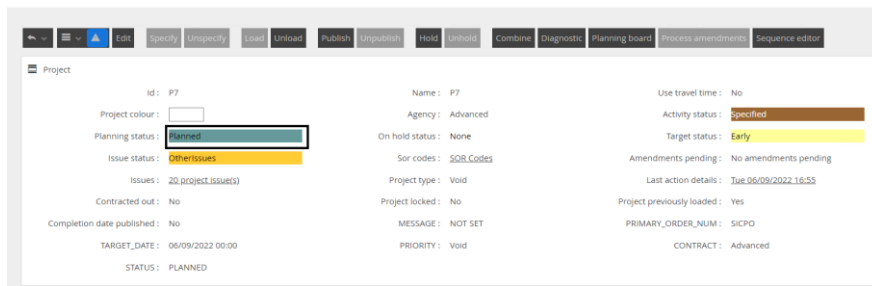
Project



Clicking this link will display any issues and provide you with some detail on how to resolve them.

If Project Planner Web has been able to schedule some of your project, the Planning Status will be moved to Planned.

Project



If you scroll down through the Project detail, you can review your Project Packages and their scheduling.

Project packages							
default							
Refresh Today Any status Columns X Reset Keep Export							
id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent compl	
<input type="checkbox"/>	link	link					
<input type="checkbox"/> PP58	Specified	Planned	0	07/09/2022 10:15	07/09/2022 11:30	0	
<input type="checkbox"/> PP59	Specified	Planned	0	06/09/2022 09:00	07/09/2022 13:30	0	
<input type="checkbox"/> PP60	Specified	Planned	0	07/09/2022 13:30	07/09/2022 15:10	0	
<input type="checkbox"/> PP61	Specified	Planned	0	08/09/2022 09:00	08/09/2022 14:08	0	
<input type="checkbox"/> PP62	Specified	Planned	0	07/09/2022 15:10	07/09/2022 16:10	0	
<input type="checkbox"/> PP63	Specified	Planned	0	09/09/2022 09:00	09/09/2022 13:10	0	
<input type="checkbox"/> PP64	Specified	Planned	0	06/09/2022 09:00	06/09/2022 17:00	0	
<input type="checkbox"/> PP65	Specified	Planned	0	15/09/2022 14:00	15/09/2022 14:25	0	
<input type="checkbox"/> PP66	Specified	Planned	0	06/09/2022 09:00	13/09/2022 10:58	0	
<input type="checkbox"/> PP67	Specified	Planned	0	13/09/2022 10:58	13/09/2022 11:58	0	
<input type="checkbox"/> PP68	Specified	Planned	0	13/09/2022 11:58	13/09/2022 16:58	0	

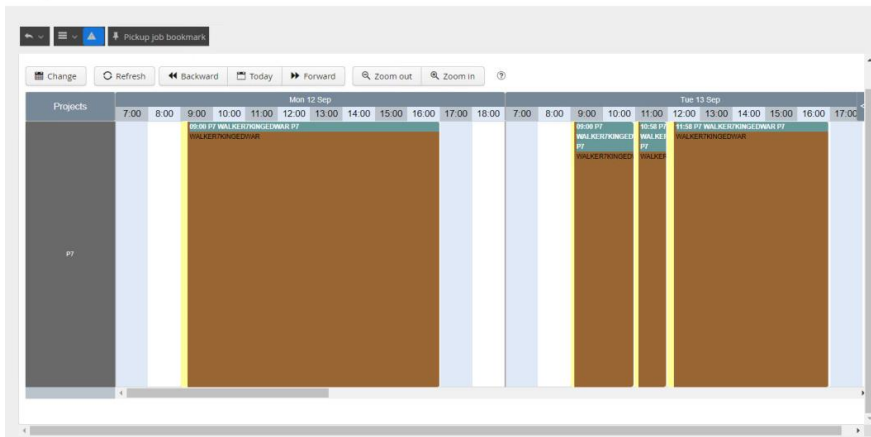
To view the Project in the planning board, click the Planning Board button at the top of the Project details.

Project



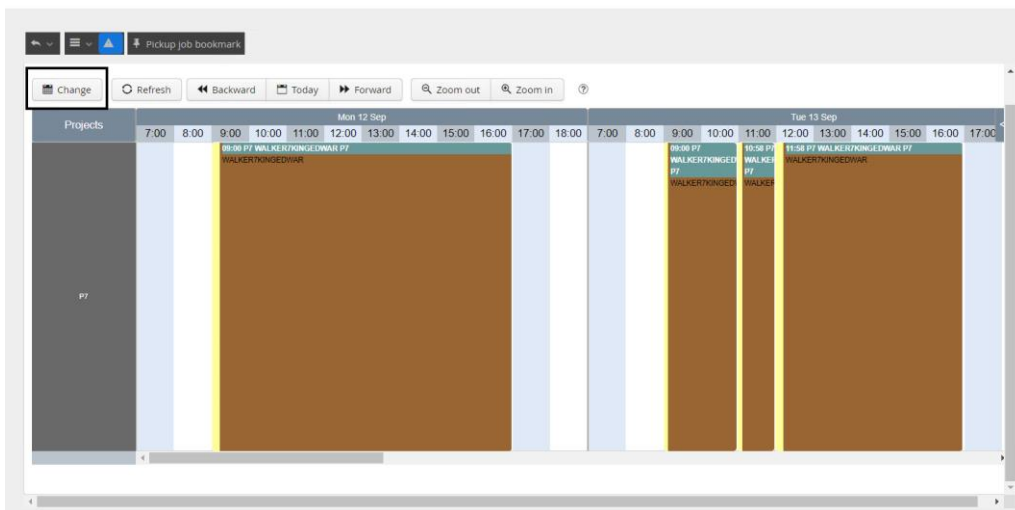
Your Project will be displayed on the Planning board.

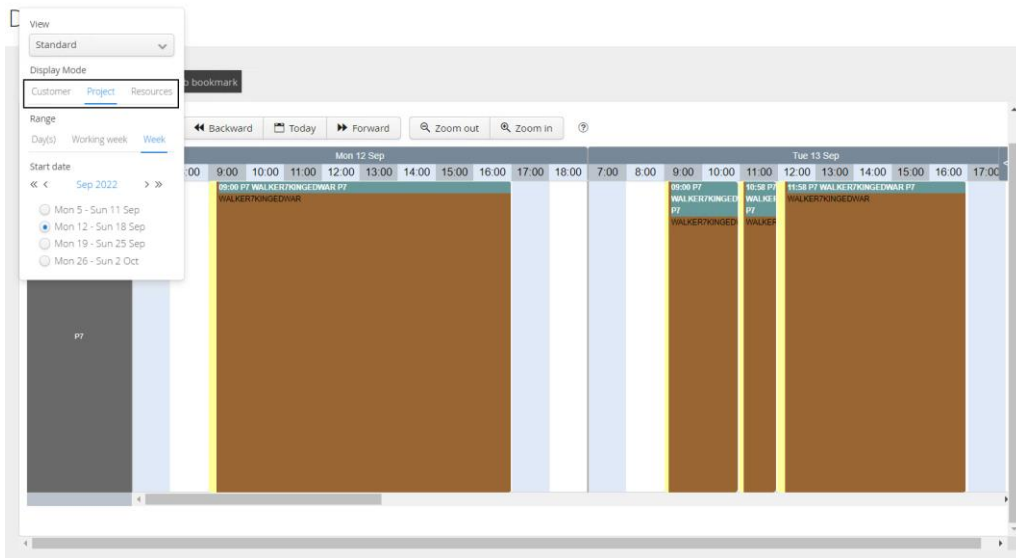
Diary



The Planning board can be viewed by Project, Customer or Resource by clicking the Change button.

Diary





Publishing your Projects to DRS

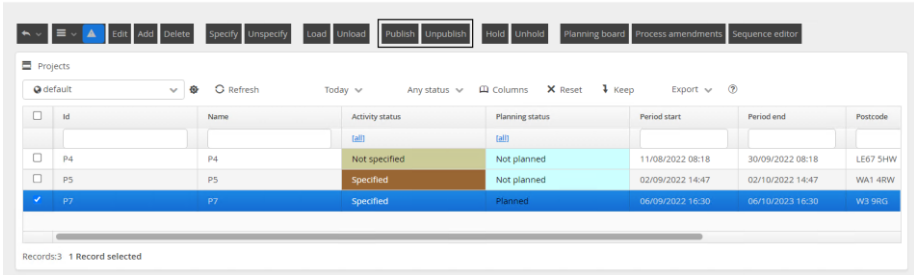
Publishing Projects is the final step in the Project lifecycle. The act of Publishing a Project will create tasks within the corresponding DRS Diaries, which will allow your Mobile devices to communicate with DRS and deliver tasks to your mobile Resources.

Publishing can be achieved at Project or Project Package level. At the point of publishing, the selected items, either Project(s) or specific Project Package(s) will be published into DRS.

If a Project is selected, Project Planner Web will attempt to Publish all of the associated Project Packages into DRS.

To Publish an object into DRS, first select your desired object, whether Project or Project Package, and click the Publish button.

Projects




Id	Name	Activity status	Planning status	Period start	Period end	Postcode
P4	P4	Not specified	Not planned	11/08/2022 08:18	30/09/2022 08:18	LE67 5HW
P5	P5	Specified	Not planned	02/09/2022 14:47	02/10/2022 14:47	WA1 4BW
<input checked="" type="checkbox"/>	P7	Specified	Planned	06/09/2022 16:30	06/10/2023 16:30	W3 9RG

Records: 3 1 Record selected

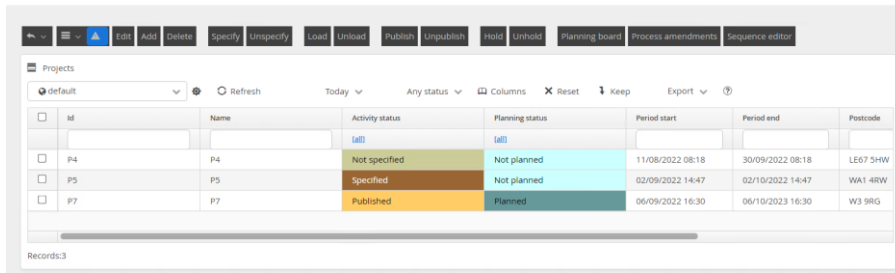
Confirm you are ready to Publish your objects into DRS

Confirm

 Are you sure you want to publish the project (s) ?

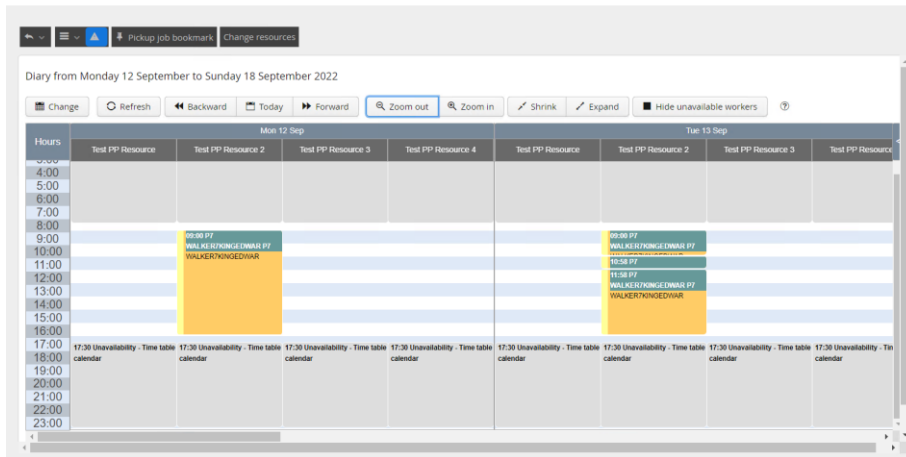
Once the publish action has completed, the Planning Status of the Project will be updated to Published.

Projects



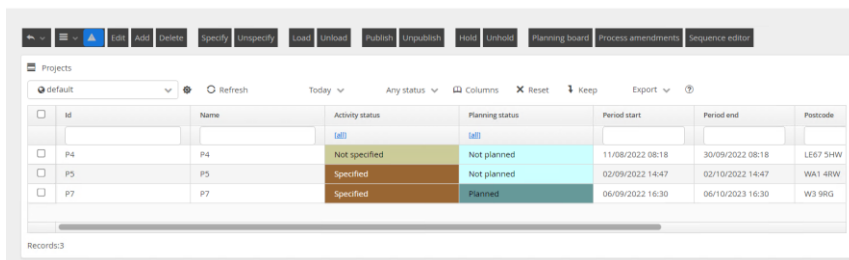
You can review your Project Planner Resources within the DRS Diaries and appointments should be created for them in line with the loaded schedule.

Diary



To remove Published Projects from DRS, use the Unpublish button. Your Project will be set back to Planned.

Projects



Holding a Project

Holding a Project will put a pause on the Loading and progression of Projects or Project Packages, depending on the level at which it is used.

When the Hold function is used on a Project, the Hold will Unpublish and Unload any work which is not in progress. It will not be possible to Load the Project again until the Hold is removed.

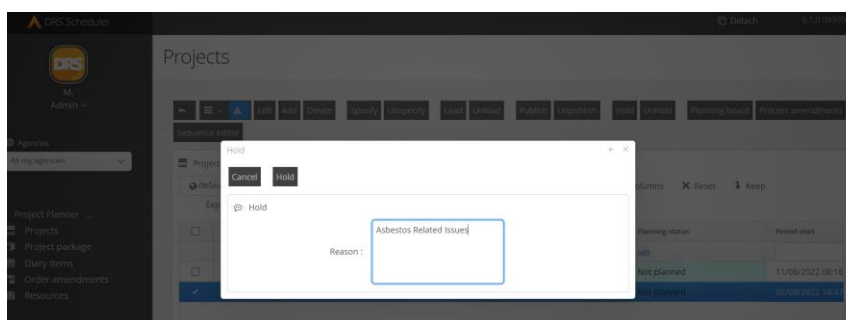
To place a hold on a Project, select your Project from the Project list and click the Hold button.

Projects

Id	Name	Activity status	Planning status	Period start
P4	P4	Not specified	Not planned	11/08/2022 08:18
P5	P5	Specified	Not planned	02/09/2022 14:47

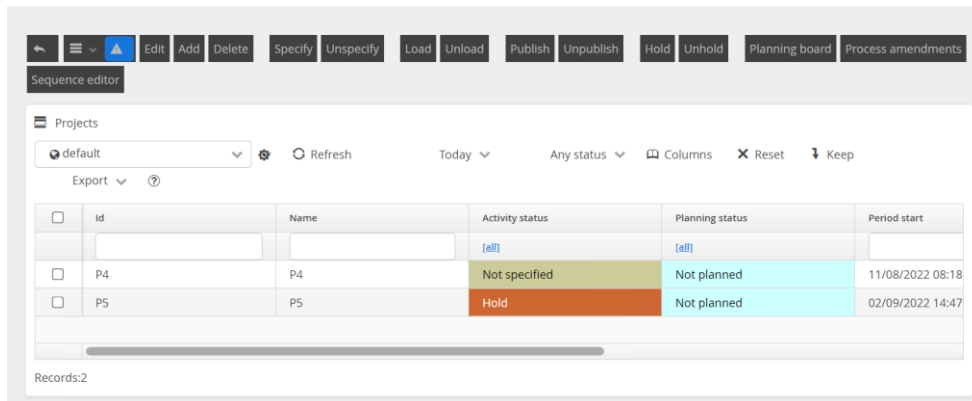
Records: 2 1 Record selected

You will be offered an option to place a Reason on why you are placing the Project on Hold.



The status of the Project will be set to Hold

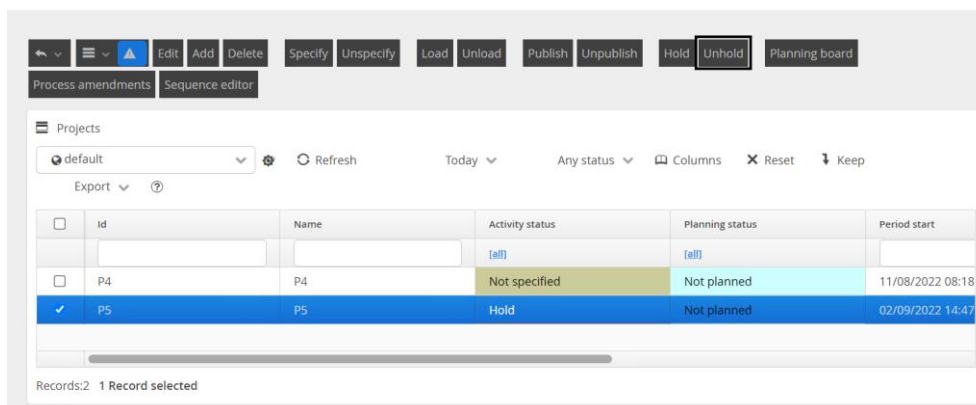
Projects



And your hold reason will be displayed within the Project Details. It will not be possible to continue to work on this Project until the Hold is removed.

To do this, select your Project and click the Unhold button

Projects



Your Project Activity Status will be changed back to Specified.

Projects

← ≡ ▲ Edit Add Delete Specify Unspecify Load Unload Publish Unpublish Hold Unhold Planning board

Process amendments Sequence editor

Projects

default ⌵ ⚙️ Refresh Today Any status Columns Reset Keep

Export ⌵ ?

<input type="checkbox"/>	Id	Name	Activity status	Planning status	Period start
			[all]	[all]	
<input type="checkbox"/>	P4	P4	Not specified	Not planned	11/08/2022 08:18
<input type="checkbox"/>	P5	P5	Specified	Not planned	02/09/2022 14:47

Records:2

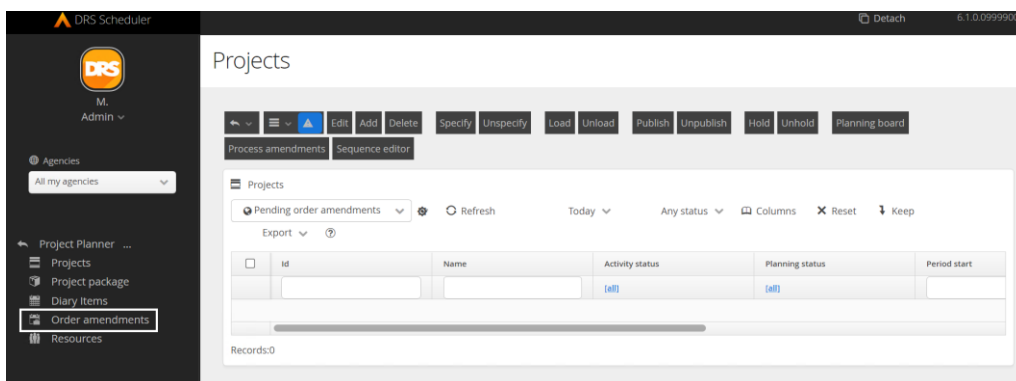
Processing Order Amendments

Order Amendments can be provided to DRS Project Planner Web via the Webservices or Flat file from your integrating system.

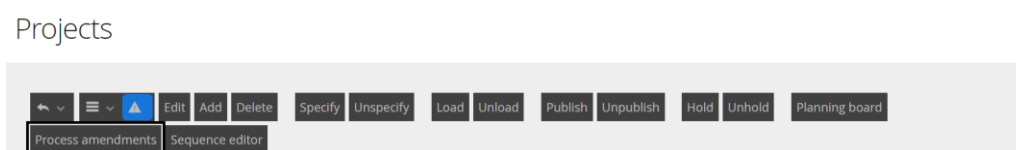
When processing amendments, two methods are available. One of these is selected for each implementation of Project Planner.

- The housing application can send across all uncompleted work. All existing uncompleted Work Items in Project Planner are deleted, and the lines present on the Order Amendment are then added.
- The housing application can send across only those lines of the order which have changed. The quantity and hence SMV on the Work Items with a matching line number are changed to reflect the input amendment. Any line numbers present on the Order Amendment which do not exist in the Project Work Items are treated as additions and added to the Project. The duration of Work Packages is changed to reflect changes to Work Items.

There are two ways to process Amendments for your Projects. You can either select the amendments from the Order Amendments View,



Or selecting the Process Amendments button directly from any visible menu.



To use this button, select your Objects from the associated list and click Process Amendments. If there are Amendments to process, DRS Project Planner Web will give you a success report following the update. If there are no Amendments to process, DRS Project Planner Web will display this warning.

Projects

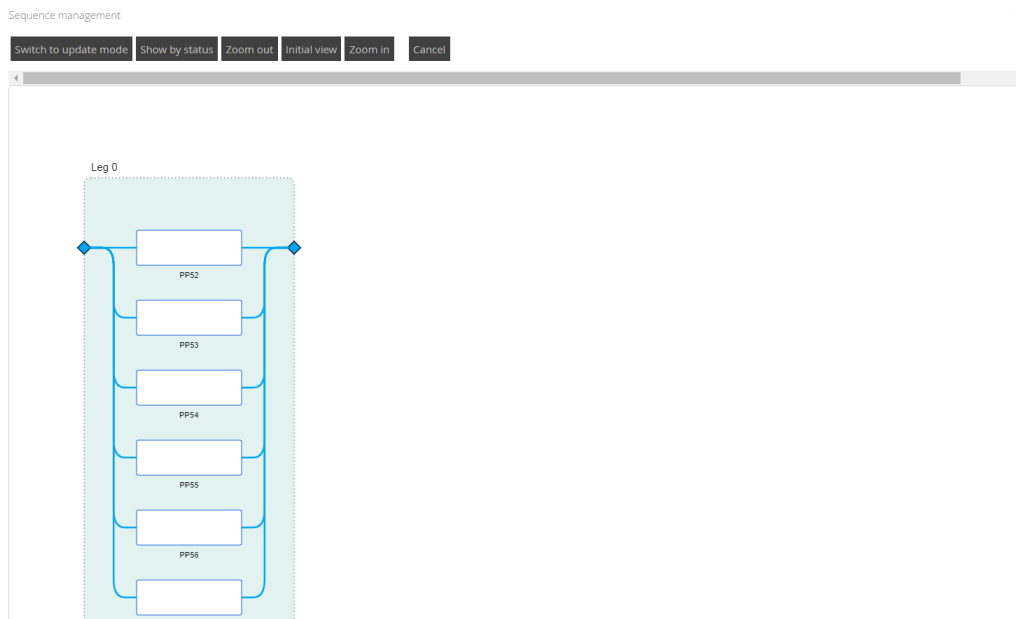
The screenshot displays the 'Projects' section of the DRS Project Planner Web interface. At the top, there is a toolbar with buttons for 'Edit', 'Add', 'Delete', 'Specify', 'Unspecify', 'Load', 'Unload', 'Publish', 'Unpublish', 'Hold', 'Unhold', and 'Planning board'. Below the toolbar, there are tabs for 'Process amendments' and 'Sequence editor'. The main area shows a table with columns for 'Id', 'Planning status', and 'Period start'. Two rows are visible: P4 (Not specified, Not planned) and P5 (Specified, Not planned). A red warning message is overlaid on the table, stating 'There are no amendments pending on the projects selected'. The status bar at the bottom indicates 'Records:2 2 Record selected'.

Id	Planning status	Period start
P4	Not specified	Not planned
P5	Specified	Not planned

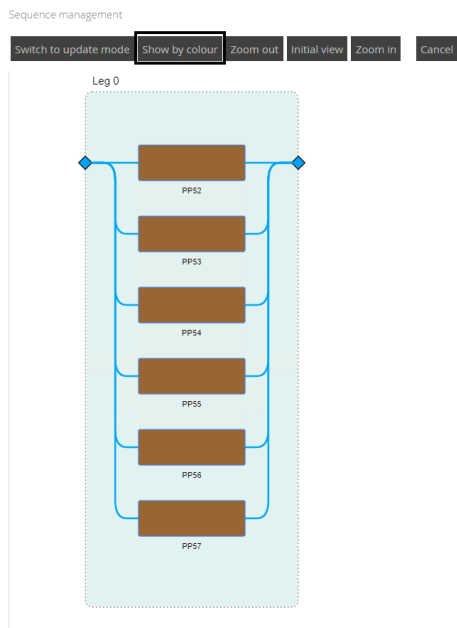
Using the Sequence Editor

Project Planner Web comes with a Graphical Interface to update Project Sequencing after the scheduling.

After you Specify a Project or Project Package, select it and click Sequence Editor from the menu list. The Project Package sequence will be displayed in a visual interface.



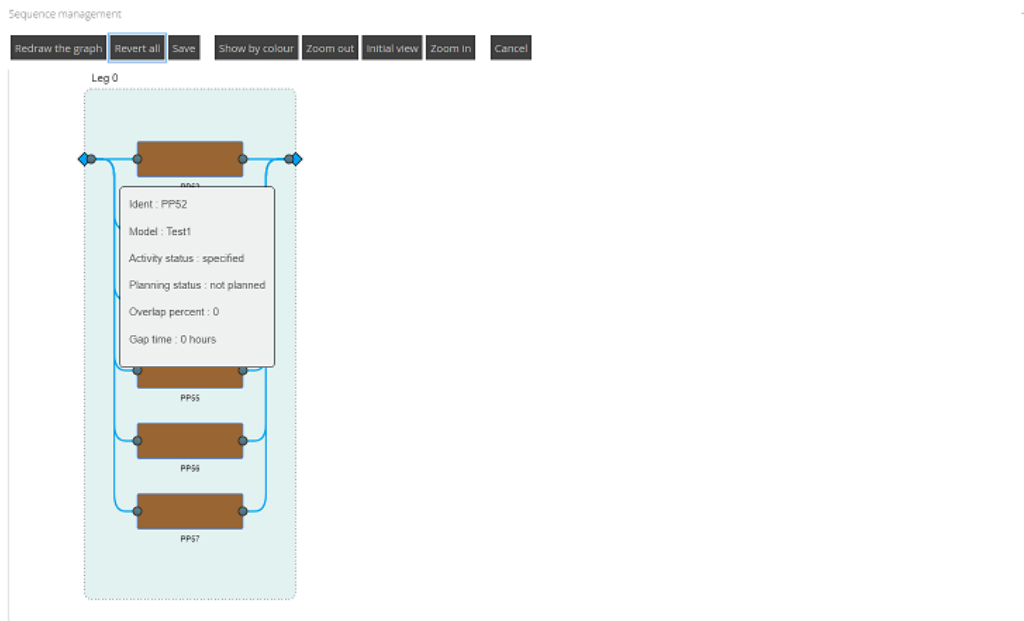
The display can be configured to display by Project Package colour, or by Activity Status. This is swapped by clicking the Show by Status/Colour button.



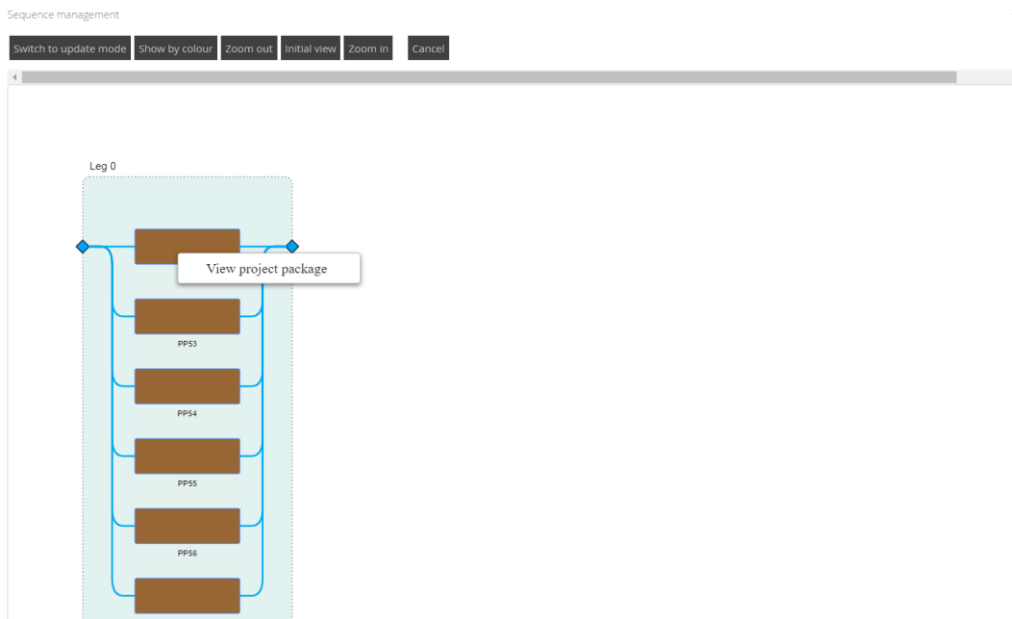
Reviewing the Detail

Improve or update the aspect of the sequence by using the Zoom in and Zoom out button. To revert back to the view provided when the Sequence Editor was opened, click the Initial View button.

Detail on the Project Packages can be seen by hovering over the desired package. This will display a configured tool-tip.



By right clicking on the Project Package icon, you will be offered the opportunity to navigate to the Project Package.



Clicking on View Project Package will take you to the Project Package Detail.

Project package

Assignment

Activity status: **specified** Planning status: **Not planned** Global assigned period: 02/09/2022 14:47 - 02/10/2022 14:47
Assigned resources: -- undefined --

Project package

Id: PPS2 Template: Test1 Agency: Advanced
Last update: Mon 05/09/2022 16:46 Colour:
Do not publish: false
Keep planning together: false Plan concurrently: false Last item max shrink time: 0
Exclude project package from planning: false Ignore assigned resources: false Plan without efficiency: false
Always Load: false Sor codes: SOR Codes Issue status: None
Issues: No issue USER_QUEUE: admin APPOINTMENT_REASON: FIRST
APPOINTMENT_SEQUENCE: FIRST COMMENTS: |BASIN:DISCONNECT AND REMOVE EMERGENCY: NO
ORIGINAL_USER: admin SUSPEND_RESCHEDULE: YES JEOPARDY: 9999

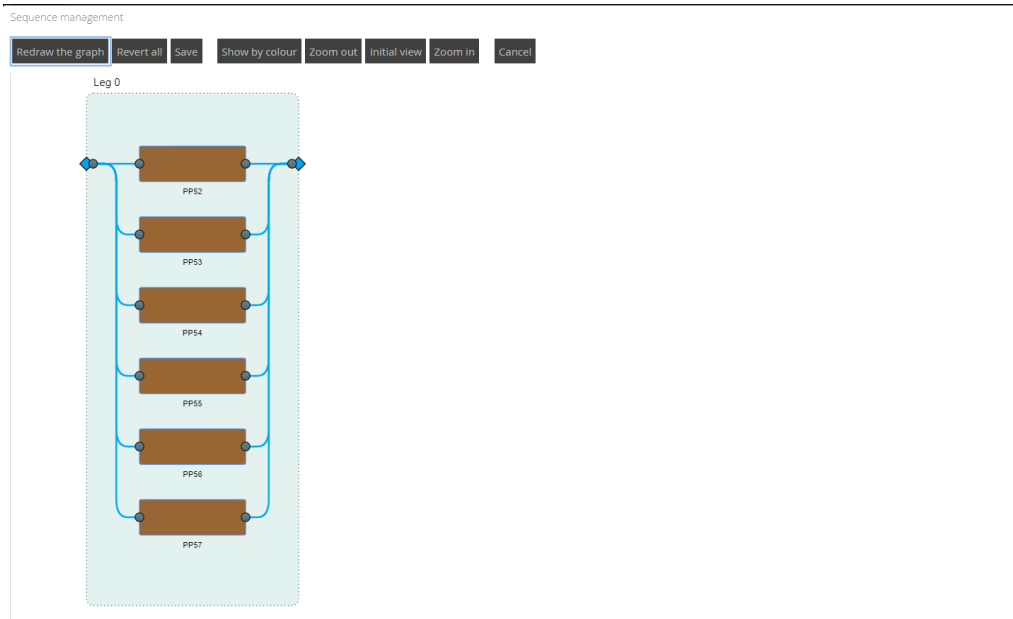
Sequence

Overlap percentage: 0 Gap time: 0 GapTime type: Hours

To close the Sequence editor, click the Cancel button.

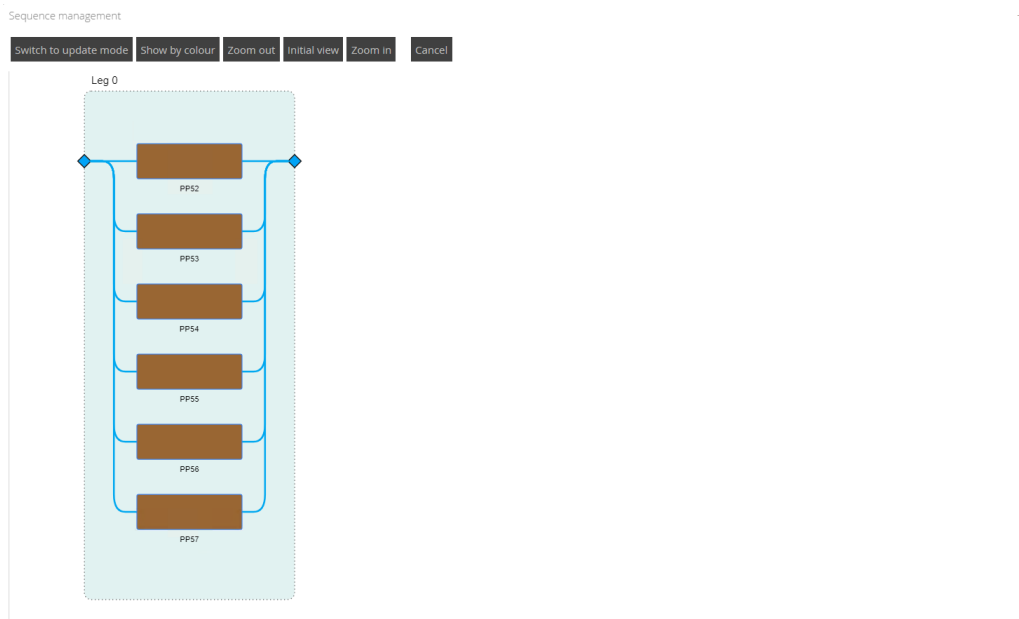
Rearranging the Sequence

Legs, Streams and Sequences can be used to isolate packages of work to be completed in parallel to each other.



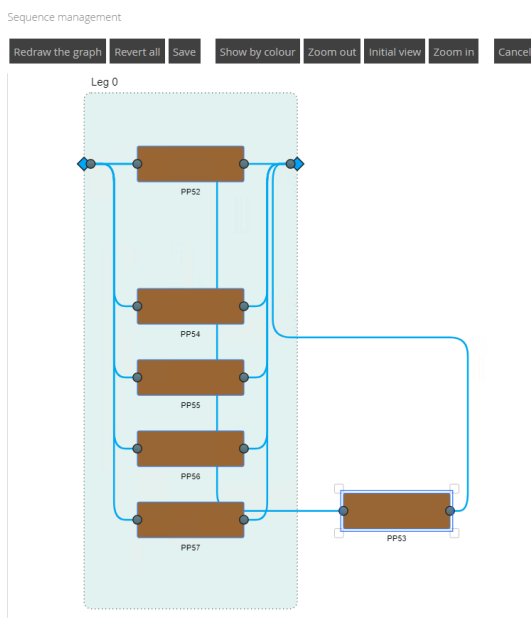
In this instance, all of the Project Packages within this Project have the same Sequence and will be completed within the same Leg. This will mean that all Project packages will be started at approximately the same time, resource permitting.

This can be easily edited through the click and drag interface. Click on the button marked Switch to Update Mode.



This will allow you to begin to make changes to the Sequence of your Project.

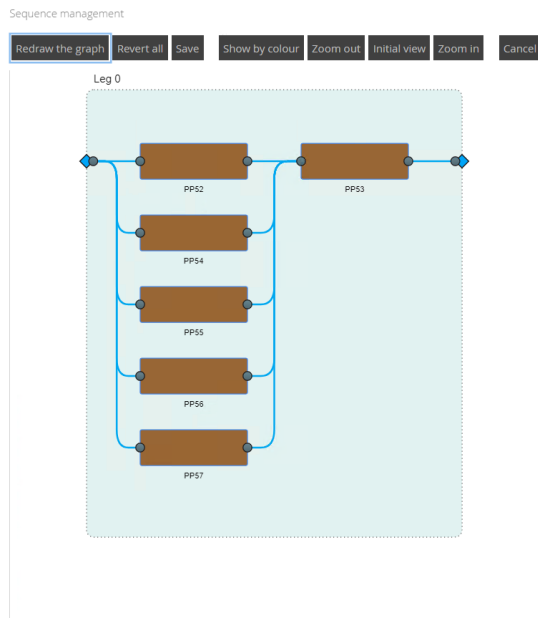
Once in update mode, click, hold and drag the Project Package you wish to change into the appropriate position.



Re-arrange the sequence nodes by selecting the blue sequence link and click Delete. To redraw the sequence, you need to consider the overall sequence of

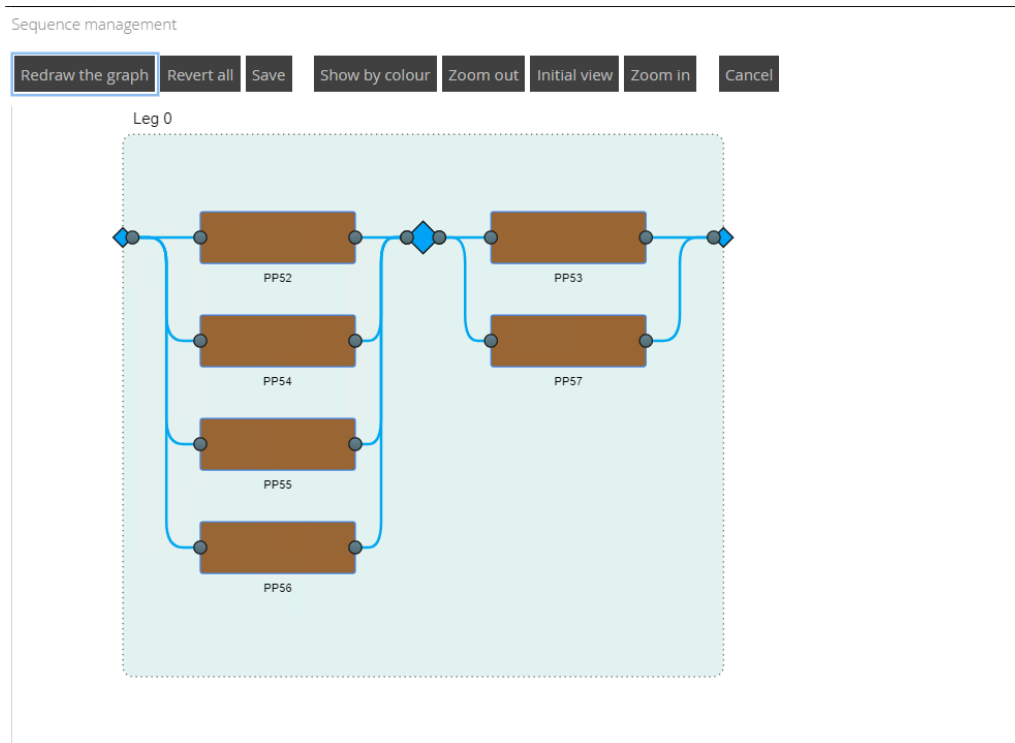
delivery. In this case, all nodes leading from the unchanged Project Packages leading to the exit of the Leg.

The new sequence would look like this, once complete.

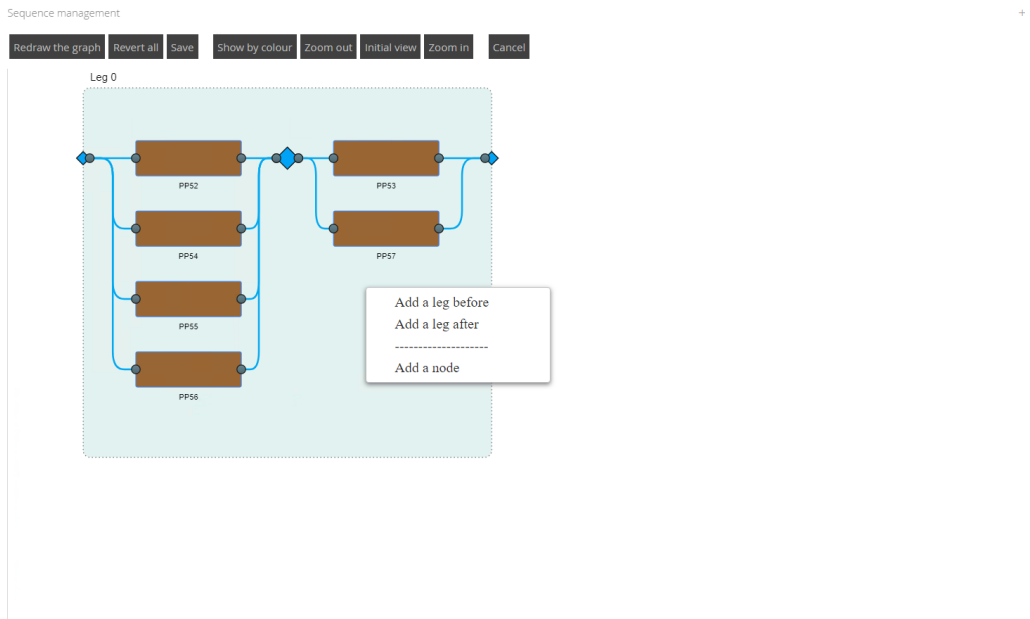


Nodes

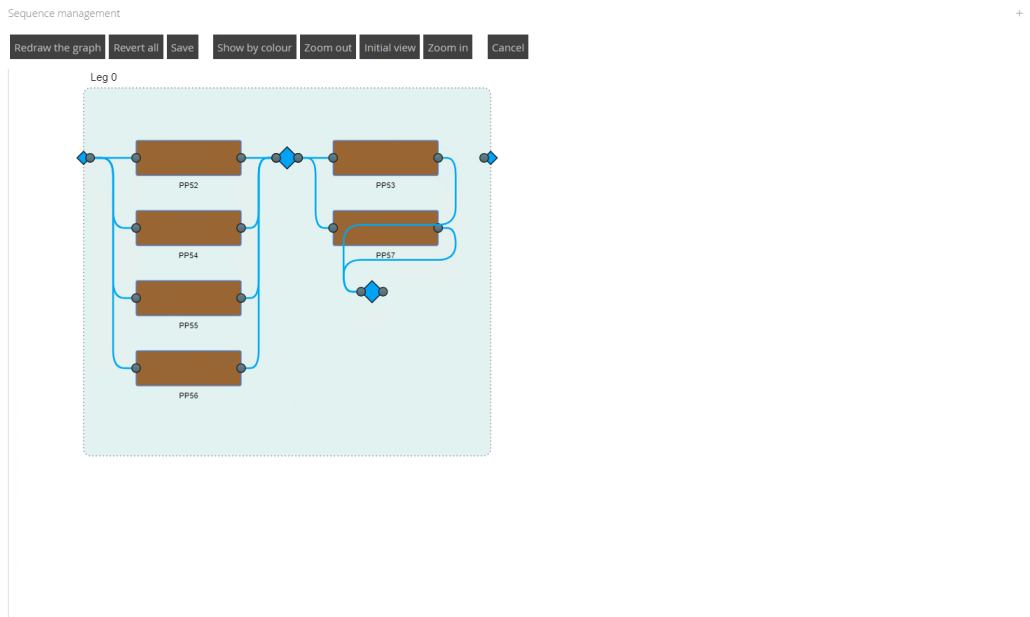
Nodes are used when two or more sequences occur together and are schedule after or before one or more sequences. Within the interface, Nodes are displayed as blue triangles. This indicates a coming together of sequence ending, a split on sequence beginning, or both.



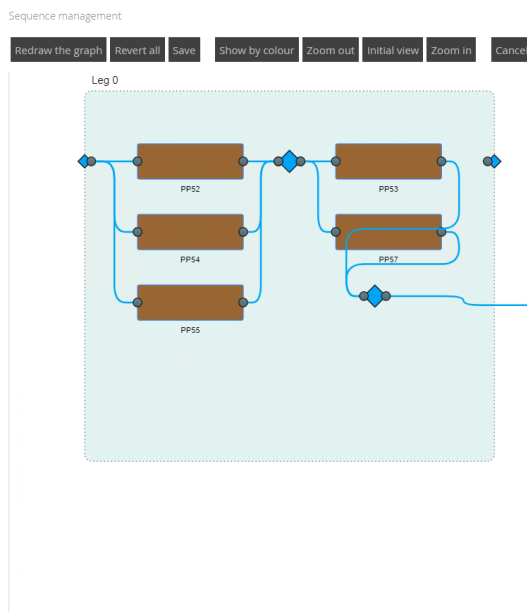
To create additional Nodes when re-organising the sequence, right click within the Leg area and select 'Add a Node'.



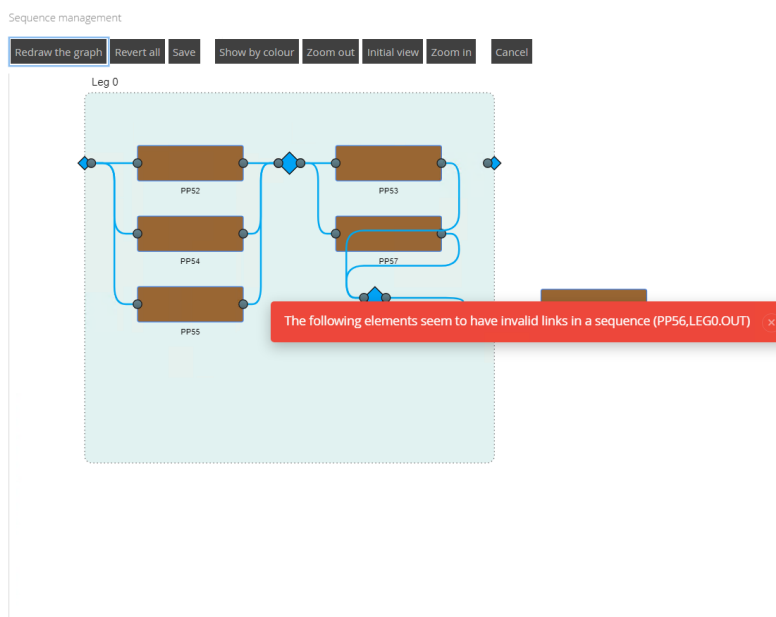
Begin by connecting your Node to the appropriate sequences and removing any other necessary links.



Drag your Sequence into the right place and link it through to your node in the same way.

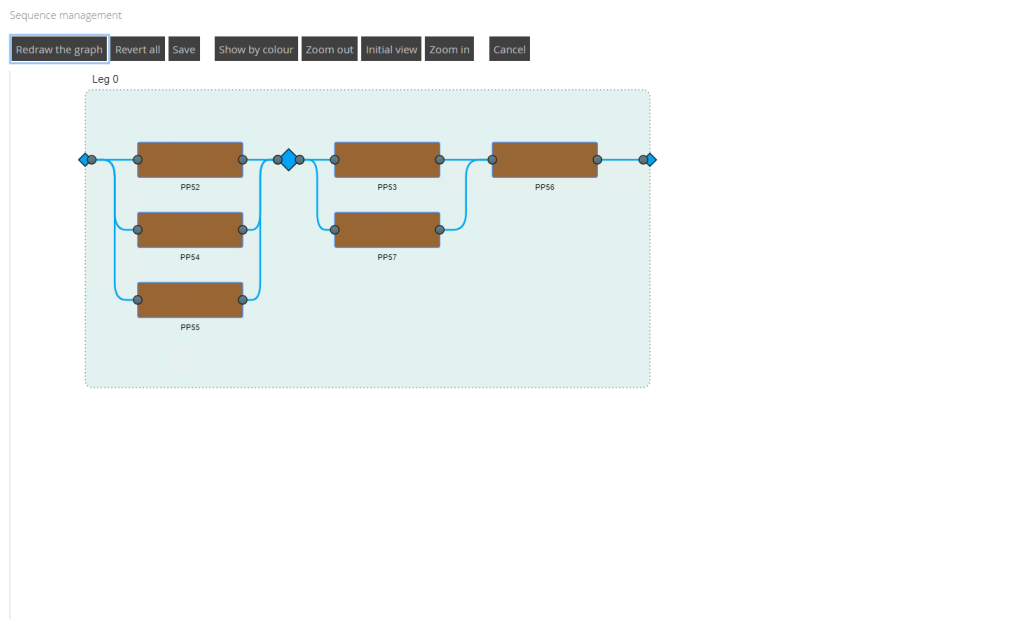


At any point within the change, you can click 'Redraw the Graph' to tidy up the display. If the sequence is incomplete, you will be shown an error similar to this.



The error will indicate which nodes it believes are not connected correctly. In this case, there is no connection between the completion of PP56 and the end of the Project, Leg0.Out.

Resolving that issue and clicking the button again will yield a redrawn sequence.



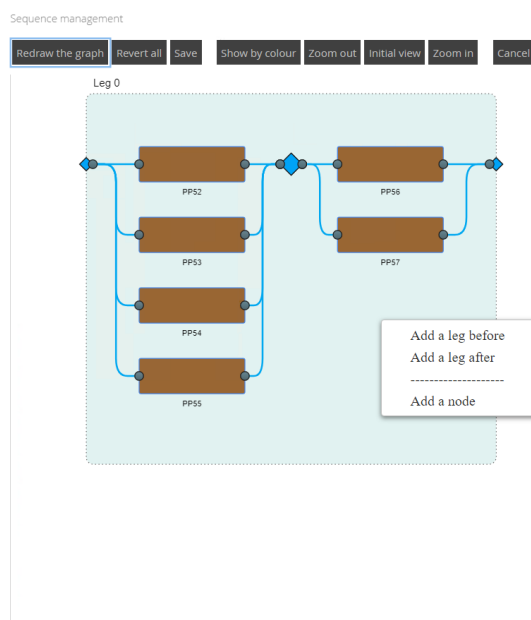
This new sequence will result in Project Packages PP52, PP54 and PP55 will be scheduled. After their scheduled completion, this will then allow PP53 and PP57 to be planned into start. Following their scheduled completion, PP56 will begin.

Adding Legs

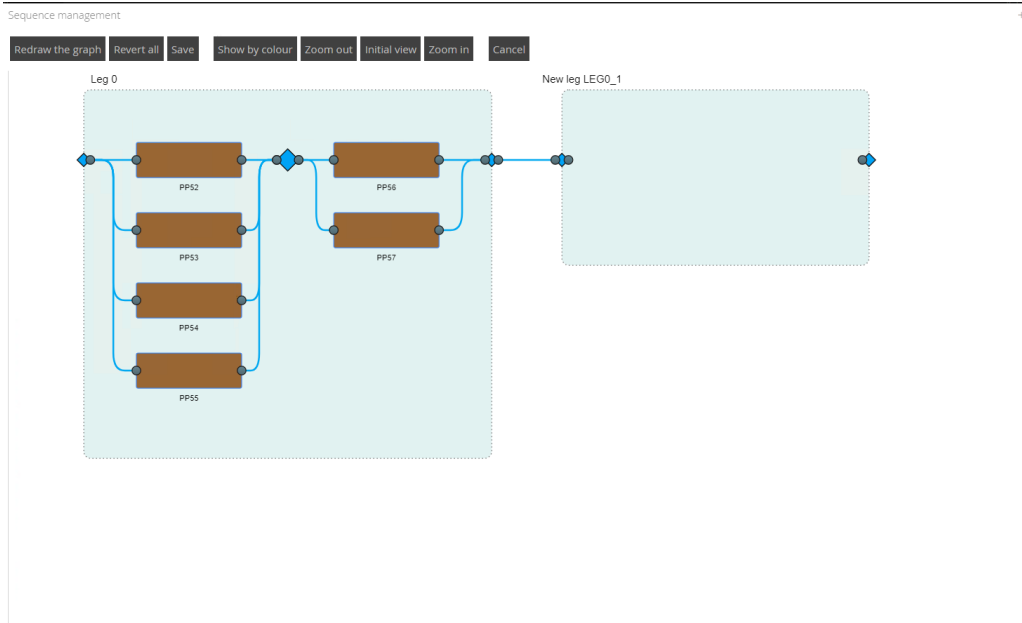
Legs within Project Planner can allow for several connected Project Package sequences to run in parallel.

The sequence editor allows you to create Legs within the existing sequence with the same ease as re-organising your existing sequence.

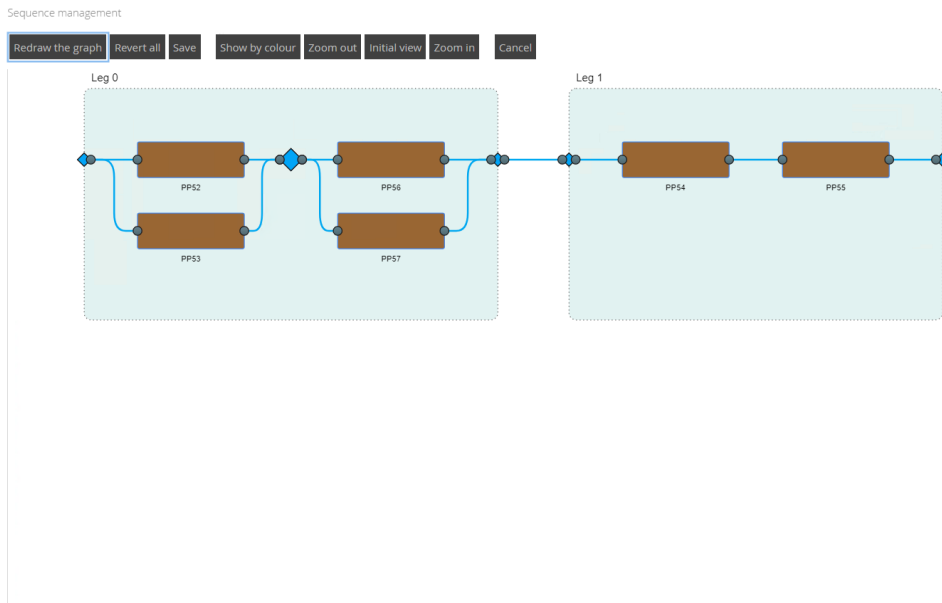
Add in a New Leg by right clicking within the existing leg and selecting from one of the Add Leg options



This will add a new Leg in and connect it to the previous.

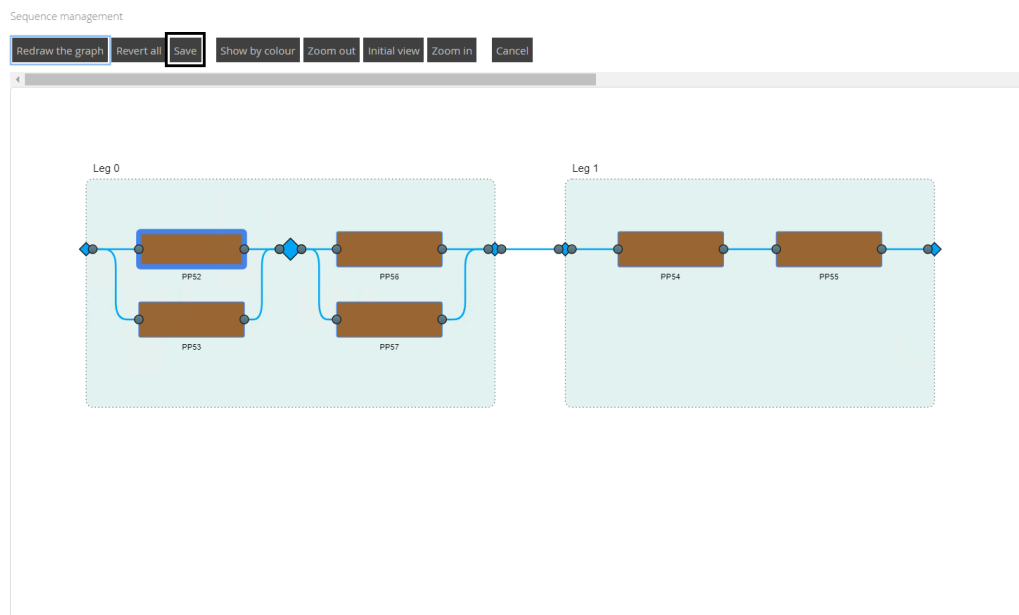


In the same way as organising your previous sequence, move your needed sequences into the new Leg and arrange the needed sequence.

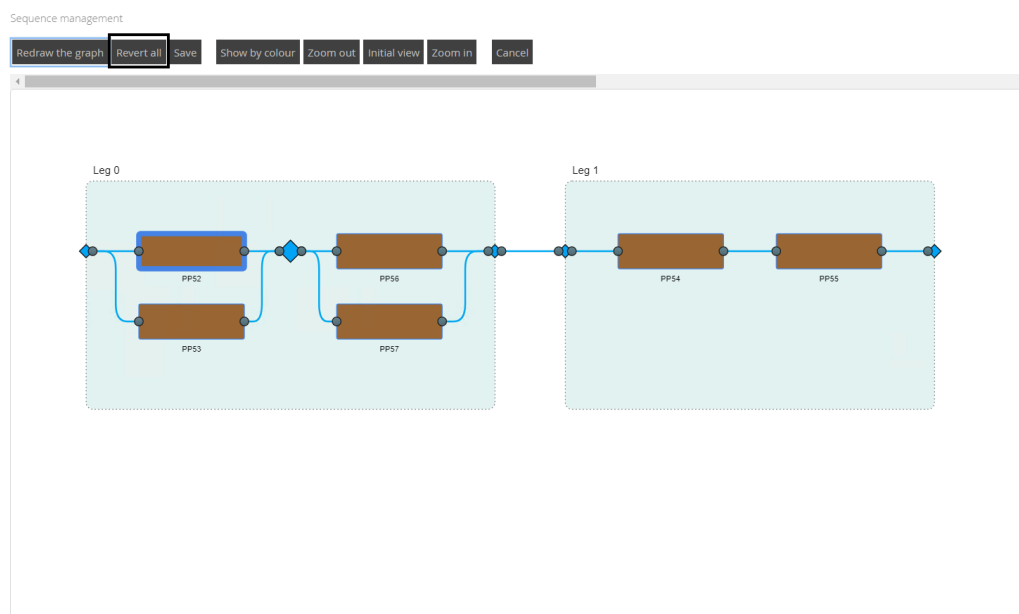


Updating the Sequence

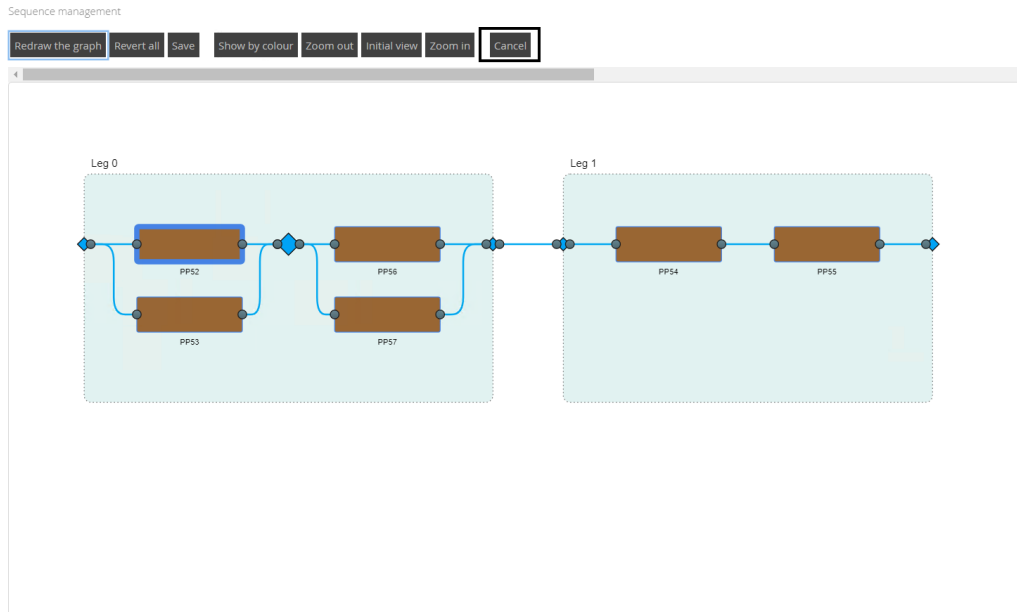
It is important that when you have completed your changes, you retain them by clicking the Save button.



If you need to revert your changes, you can use the Revert All button.



To cancel out of the sequence Editor and return to your previous screen, click the Cancel button. This will revert all changes and exit the Sequence editor.

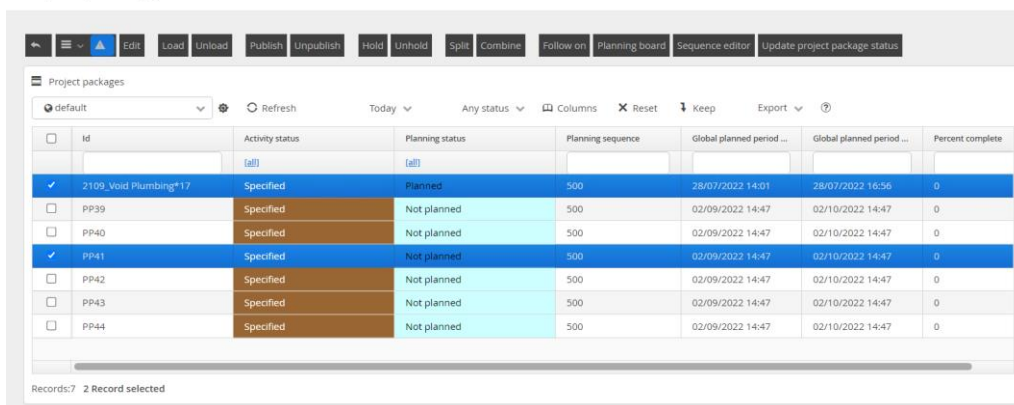


Managing your Project Packages

Project package(s) can be managed in the same way that Projects can be managed. Many of the options available at the Project level are also available at the Project Package level. This can be achieved from within the Project Package view or individual Project Package details screen.

Load, Unload, Publish, Unpublish, Hold, Unhold, Split, Combine, Follow on, Planning board, Sequence editor and Update project package status can all be used as described within the [Projects](#) section of this user guide.

Project packages



The screenshot displays the 'Project packages' management interface. At the top, there is a toolbar with buttons for 'Edit', 'Load', 'Unload', 'Publish', 'Unpublish', 'Hold', 'Unhold', 'Split', 'Combine', 'Follow on', 'Planning board', 'Sequence editor', and 'Update project package status'. Below the toolbar, there is a search bar with 'default' selected, a 'Refresh' button, and filters for 'Today', 'Any status', 'Columns', 'Reset', 'Keep', and 'Export'. The main area contains a table with the following data:

<input type="checkbox"/>	Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent complete
<input checked="" type="checkbox"/>	2109_Void Plumbing*17	Specified	Planned	500	28/07/2022 14:01	28/07/2022 16:56	0
<input type="checkbox"/>	PP39	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
<input type="checkbox"/>	PP40	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
<input checked="" type="checkbox"/>	PP41	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
<input type="checkbox"/>	PP42	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
<input type="checkbox"/>	PP43	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
<input type="checkbox"/>	PP44	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0

At the bottom of the table, it indicates 'Records:7' and '2 Record selected'.

By selecting one or multiple items within the Project Packages view you can use these functions to update and manage the individual Project Packages.

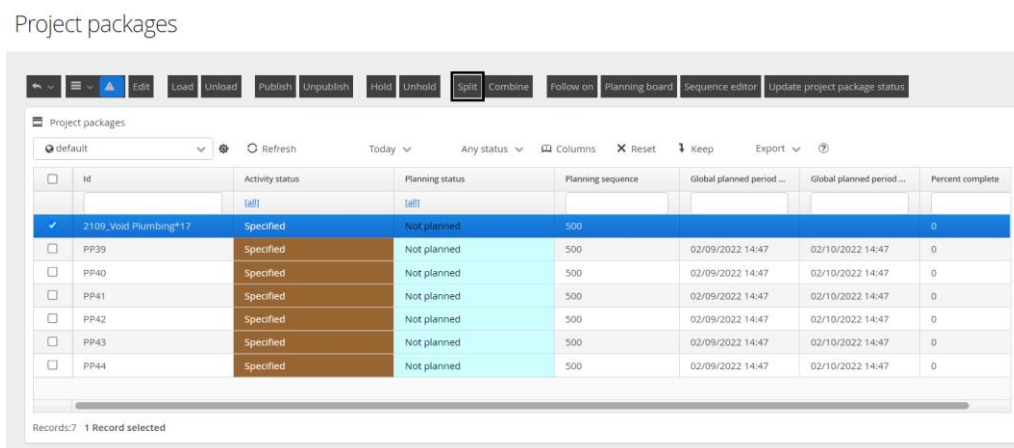
Splitting your Project Packages

Project Packages will be allocated to the number of resources configured on the Project Package Template, though in some cases, it may be necessary to add additional resource to complete the package in a shorter timescale.

The Split function can allow you to do this with any Project package which has not been started and is at the Planning Status of 'Not Planned'.

The function can be accessed from the Project Packages view or details screen.

Begin by selecting the package you wish to split and clicking the Split button from the top list.



You will be offered the opportunity to split the work package in two ways.

You can either split the required effort by time, by selecting the number of resources required from the No. of split option. Project Planner Web will automatically allocate the amount of effort over the selected resource splits.

Split project package + x

Cancel Apply

[Project package split details](#) [Split by sor code](#)

Project package split details

No. of split + - RemainingEffort :

Effort to be planned :

Required Resource :

Effort to be planned :

Required Resource :

Effort to be planned :

Required Resource :

You can at this point adjust the effort planned for each split and assign specific resources.

If you fail to allocate the total amount of effort available, Project Planner Web will highlight this within the Remaining Effort window.

Split project package + x

Cancel Apply

[Project package split details](#) [Split by sor code](#)

Project package split details

No. of split + - RemainingEffort :

Effort to be planned :

Required Resource :

Effort to be planned :

Required Resource :

Effort to be planned :

Required Resource :

Once you have resolved the split of effort, you can click Apply and it will create the required Project Packages. Where specified, they will be resource locked to the required resource.

Project packages

Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent complete
2109_Void Plumbing*17	Specified	Not planned	500			0
PP39	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP40	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP41	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP42	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP43	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP44	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP45	Specified	Not planned	500			0
PP46	Specified	Not planned	500			0

If you did not specify a required resource on the Split creation, when the additional Project packages are loaded, resources will be allocated from your resource pool.

Alternatively, you can split Project Packages by SOR. After clicking the Split button, use the Menu options to move to Split by SOR Code

Split project package

Cancel Apply

Project package split details **Split by sor code**

Project package split details

SOR	Description	Trade	Cost	Quantity	Qty Used	Time Rem	SMV	Location
630705	MULTI -		0	1	0	0	100	
630707	MULTI -		0	1	0	0	75	

Check the SOR you would like to Split into a new Project Package and click Apply.

Split project package

Cancel Apply

Project package split details **Split by sor code**

Project package split details

SOR	Description	Trade	Cost	Quantity	Qty Used	Time Rem	SMV	Location
630705	MULTI -		0	1	0	0	100	<input checked="" type="checkbox"/>
630707	MULTI -		0	1	0	0	75	<input type="checkbox"/>

A new Project Package will be created and available for Loading within the view.

Project packages

The screenshot shows a software interface for managing project packages. At the top, there is a toolbar with buttons for Edit, Load, Unload, Publish, Unpublish, Hold, Unhold, Split, Combine, Follow on, Planning board, Sequence editor, and Update project package status. Below the toolbar, the interface displays a table of project packages. The table has columns for Id, Activity status, Planning status, Planning sequence, Global planned period, and Percent complete. The table contains 10 records, with the last one (PP47) selected. The status of each record is shown in a colored box: brown for 'Specified' and cyan for 'Not planned'.

Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent complete
	fall	fall				
2109_Void Plumbing*17	Specified	Not planned	500			0
PP39	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP40	Specified	Not planned	500			0
PP41	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP42	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP43	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP44	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP45	Specified	Not planned	500			0
PP46	Specified	Not planned	500			0
PP47	Specified	Not planned	500			0

Records:10 1 Record selected

Split Project packages can be re-combined using the Combine function.

Combining Project Packages

Any created Project Packages can be re-combined using the Combine function. To use this function, first select the Project Package you would like your other Project Packages to be combined into.

Click the Combine button.

Project packages

The screenshot shows a software interface for managing project packages. At the top, there is a menu bar with buttons: Edit, Load, Unload, Publish, Unpublish, Hold, Unhold, Split, Combine, Follow on, Planning board, Sequence editor, and Update project package status. Below the menu bar, there is a search bar with 'default' and a refresh button. The main area contains a table with the following columns: Id, Activity status, Planning status, Planning sequence, Global planned period, Global planned period, and Percent complete. The first row is selected, with a checkmark in the Id column. The data in the table is as follows:

Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent complete
2109_Void Plumbing*17	Specified	Not planned	500			0
PP39	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP40	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP41	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP42	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP43	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP44	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP45	Specified	Not planned	500			0
PP46	Specified	Not planned	500			0

At the bottom of the table, it says 'Records: 9 1 Record selected'.

You will then be offered a screen to choose the Project Packages to combine.

Combine project package + x

Cancel **Combine**

Project package details

Project package Id : 2109_Void Plumbing*17 Same project : Yes

Project package

Refresh Columns **X** Reset **↓** Keep Export **▼** **?**

<input type="checkbox"/>	Project id	Project package Id	Leg	Pr...	Pr...
<input type="checkbox"/>			<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>
<input type="checkbox"/>	00JPP130601	2126_Void Gas Check*29	0	300	0
<input type="checkbox"/>	00JPP130601	PP1	0	500	0
<input type="checkbox"/>	00JPP130601	PP2	0	500	0
<input type="checkbox"/>	00JPP130601	PP3	0	500	0
<input type="checkbox"/>	00JPP130601	PP4	0	2...	0
<input checked="" type="checkbox"/>	00JPP130601	PP45	0	500	0
<input checked="" type="checkbox"/>	00JPP130601	PP46	0	500	0
<input type="checkbox"/>	00JPP130601	PP5	0	500	0
<input type="checkbox"/>	00JPP130601	PP6	0	100	0
<input type="checkbox"/>	00JPP130601	PP7	0	500	0
<input type="checkbox"/>	00JPP130601	PP8	0	500	0

Records:19 2 Record selected

Select your Project Packages and click the Combine button. This will add any scheduled time or SOR's back into your original selected Project Package.

Creating a Follow On

Follow Ons are created to allocate additional time to your Project Package. This can be useful to allow resources to complete additional tasks while on site that had not been identified at the point of initial inspection.

To create a follow on, first select your Project Package and click the Follow On button.

Project packages

Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent complete
2109_Void Plumbing*17	Hold	Not planned	500			0
PP45	Hold	Not planned	500			0
PP46	Hold	Not planned	500			0
PP47	Hold	Not planned	500			0
PP52	Specified	Not planned	0	02/09/2022 14:47	02/10/2022 14:47	0
PP53	Hold	Not planned	0	02/09/2022 14:47	02/10/2022 14:47	0
PP54	Specified	Not planned	0	02/09/2022 14:47	02/10/2022 14:47	0
PP55	Specified	Not planned	0	02/09/2022 14:47	02/10/2022 14:47	0
PP56	Specified	Not planned	0	02/09/2022 14:47	02/10/2022 14:47	0
PP57	Specified	Not planned	0	02/09/2022 14:47	02/10/2022 14:47	0
PP58	Specified	Planned	0	07/09/2022 10:15	07/09/2022 11:30	0

Creating a Follow On in Project Planner follows the same general rules as when creating a follow on for a standard DRS appointment.

The available fields and their default states are set within your default Follow On Template.

A Notable difference is the Project Package Period. This will be defined by the parent Project Package, though this follow on can be set to have its own, specific Project Package Period. This value will determine where the Project Package can be planned when a Load action is attempted.

Duration will be picked up based on your Follow On Template defaults.

All fields with a * are Mandatory to complete. Again, their status and default values can be set through your Follow On Template defaults.

Followon project package creation

Cancel Save

Duration : 0

Project package period : 02/10/2022 14:47
09/10/2022 14:47

Business data

USER_QUEUE : * admin

APPOINTMENT_SEQUENCE : * FIRST

EMERGENCY : * NO

ACTION_TAKEN :

CREATION_DATE : 00:00

TASK_COMPLETION_STAT :

OPERATIVE_COMMENTS :

SERVICE_REQUIREMENT :
Size :
BOOKING_SUB_TYPE :

APPOINTMENT_REASON : FIRST

COMMENTS :

LAST_UPDATED :

TRADE :

ORIGINAL_DURATION : 0

ORIGINAL_USER : admin

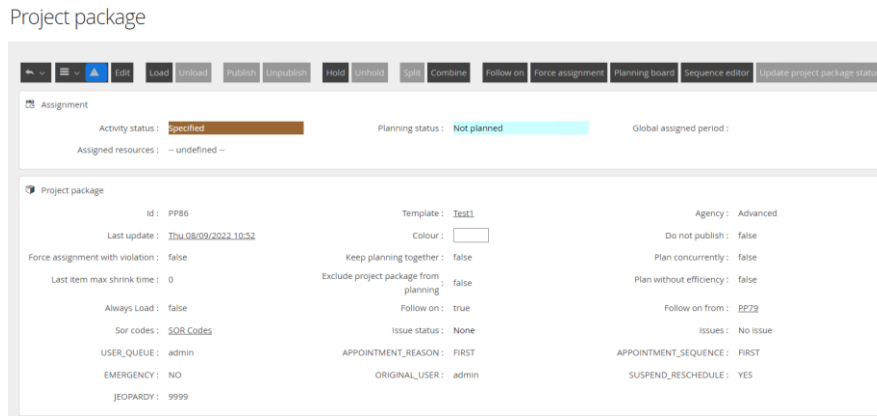
PLANNER_COMMENTS :

FOLLOW_ON_NEXT_TASK :

BOOKING_TYPE :

DURATION_STANDARD :

Once you have set all your required values, click Save, and Project Planner Web will generate an additional Project Package for you to Load.



The Package will be created using the same Project Package Template, using the same settings from the Parent Package. It will be automatically Specified but will not be Loaded into your plan.

It will note the Package the Follow On was created with a link back on Follow On From.

Any allocated SOR's to the Parent Package will be applied to the created Follow On.

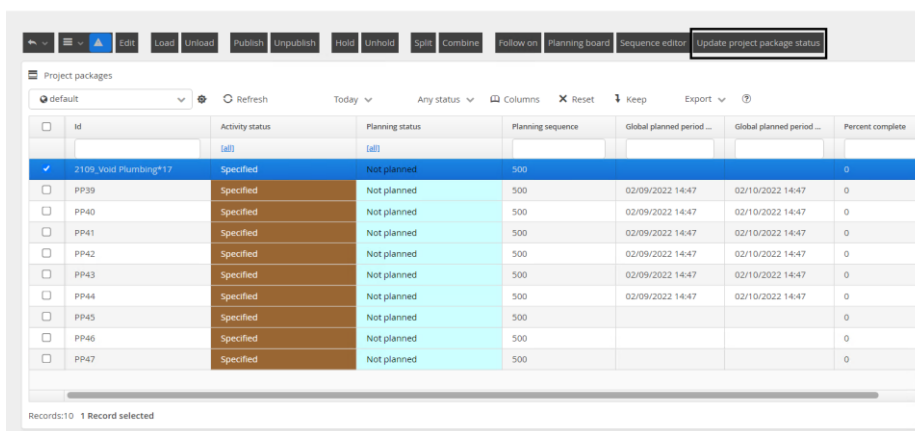


Updating Project Package Statuses

Project Package Statuses can be updated from either the Menu or within the Project Details screen. This can be useful to maintain Project Packages which cannot or have not been updated from your Mobile workers.

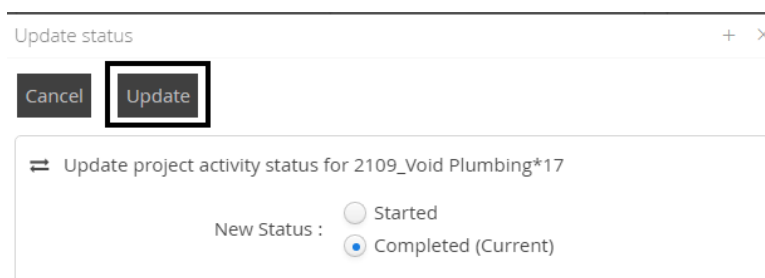
From the Project Package screen, select your Project Package and click Update Project Package Status

Project packages



Id	Activity status	Planning status	Planning sequence	Global planned period ...	Global planned period ...	Percent complete
2109_Void Plumbing*17	Specified	Not planned	500			0
PP39	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP40	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP41	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP42	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP43	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP44	Specified	Not planned	500	02/09/2022 14:47	02/10/2022 14:47	0
PP45	Specified	Not planned	500			0
PP46	Specified	Not planned	500			0
PP47	Specified	Not planned	500			0

Select the required status and click Update



Update status

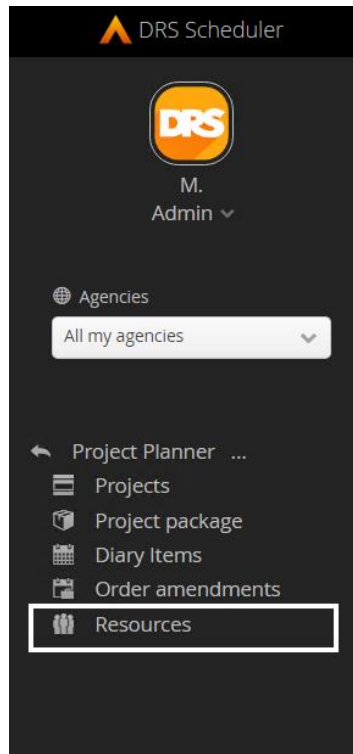
Cancel Update

Update project activity status for 2109_Void Plumbing*17

New Status : Started Completed (Current)

Managing your Resources

Project Planner Resources are managed from the Resources tab within the Project Planner menu.



Selecting the option will display Project Planner Resources only.

Resources

The screenshot shows the 'Resources' table in the Project Planner interface. The table has a toolbar at the top with various actions like Edit, Add, Delete, Copy, Refresh, Columns, Reset, Keep, and Export. The table itself contains 19 records, each with a checkbox, an Id, a Name, a Trade, a Messaging field, an Agency, and a Postcode.

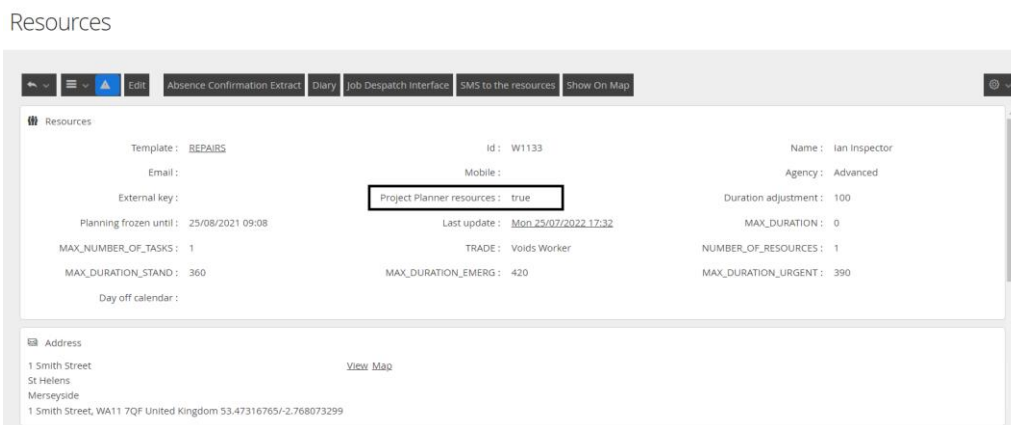
<input type="checkbox"/>	Id	Name	Trade	Messaging	Agency	Postcode
<input type="checkbox"/>	W1133	Ian Inspector	Voids Worker		Advanced	WA11 7QF
<input type="checkbox"/>	W1134	Charlie Carpenter	Voids Worker		Advanced	WA11 7QF
<input type="checkbox"/>	W1135	Ernie Electrician	Voids Worker		Advanced	WA11 7QF
<input type="checkbox"/>	W1136	Gina Gas	Voids Worker		Advanced	WA11 7QF
<input type="checkbox"/>	W1137	Brian Void Plumber	Voids Worker		Advanced	WA11 7QF
<input type="checkbox"/>	W1169	John Inspector	WILLIAM VOID		Advanced	CB22 5EG
<input type="checkbox"/>	W1170	Paul Gas	WILLIAM VOID		Advanced	CB22 5EG
<input type="checkbox"/>	W1171	George Electrician	WILLIAM VOID		Advanced	CB22 5EG
<input type="checkbox"/>	W1172	Ringo Plumber	WILLIAM VOID		Advanced	CB22 5EG
<input type="checkbox"/>	W1173	Pete Carpenter	WILLIAM VOID		Advanced	CB22 5EG
<input type="checkbox"/>	W1181	George Martin Electrician	WILLIAM VOID		Advanced	CB22 5EG

Records:19

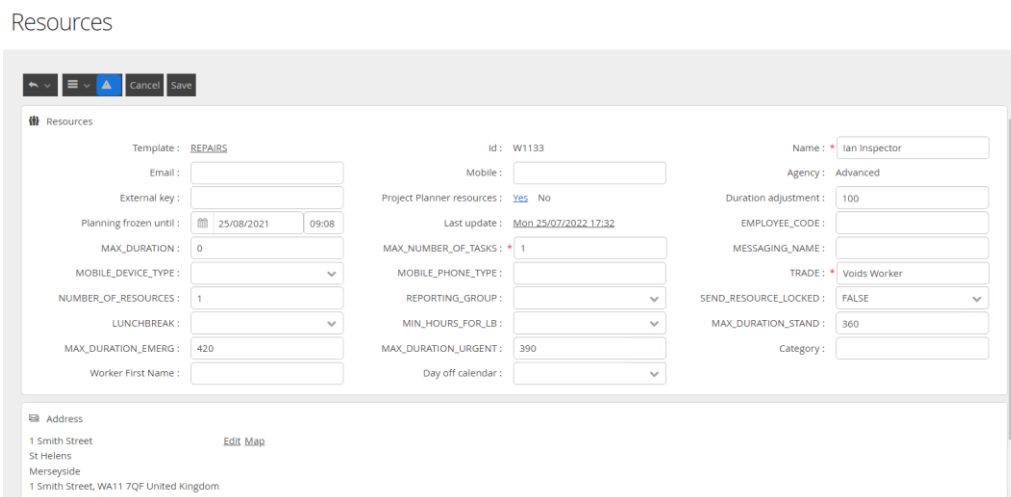
Functions within the Project Planner Resources work in the same way as managing resources within DRS Repairs. This section will focus on Project Planner specific configuration options.

Configuring your Resource for Project Planner Web


Project Planner Resources are identified by a parameter on the resource details screen. You can create a Project Planner resource from within DRS Resources by switching this parameter to True.



When editing a resource to configure for Project Planner Web, your view and options are the same as when viewing Resources within DRS Repairs.



Resources will need all the standard points of configuration such as a Starting Address;


 Address






1 Corn Row
Cambridge
Cambridge

[View Map](#)

1 Corn row, CB22 5EG United Kingdom 52.15124174/0.136193787

a Working Hours Calendar;


 Working hours calendars






 Refresh  Columns  Reset  Export 

<input type="checkbox"/>	Start	End	Be...	Working hours calendar name	Comment	Working hours calendar id
<input type="checkbox"/>			0	WM_STANDARD		WM_STANDARD

Records:1

and any required Unavailabilities.

 Unavailabilities

 Refresh  Columns  Reset  Export 

<input type="checkbox"/>	From	To	Reason	Comment
<input type="checkbox"/>				

Records:0

These are all configured in the same way as when configuring standard DRS Resources. More information on completing this configuration can be found in the DRS User Guide.

Resource Sectors and Project Packages

Configuring what work will be assigned to your resources is done by applying Project Planner Abilities to the worker. The list of available abilities will be drawn from the Project Package Templates that you have configured.

Sectors will allow you to define where the Resources will work within your configured geography.

Sectors are defined in the same way they are defined for standard DRS repairs resources.

The screenshot shows a configuration window with two main sections: 'Sectors' and 'Abilities'.
- The 'Sectors' section has a title 'Sectors' with a refresh icon. Below it, 'Primary sector : EoE - Cambridge' and 'Secondary sector :' are displayed.
- The 'Abilities' section has a title 'Abilities' with a refresh icon. Below it, 'Project Planner abilities : Kitchen Post Inspection, Kitchen Survey, Void Post Inspection,' is listed. Below that, 'Language :', 'TEAM : VOIDS,', and 'SKILL :' are displayed.


To give your resource the ability to complete Project Packages, click Edit on the Resource Details window giving you the ability to edit the Project Planner Abilities edit button.

This screenshot is similar to the previous one but includes edit and delete icons. The 'Primary sector' and 'Secondary sector' fields now have edit (pencil) and delete (trash) icons. The 'Project Planner abilities' list has edit and delete icons next to 'Void Post Inspection'. The 'Language' and 'SKILL' fields have a plus sign icon, and the 'TEAM' field has edit and delete icons.

A window will open and allow you to edit and update the allocated packages on your workers.

Abilities + X

Cancel **Apply**

 Ability

Name
PPW_ProjectPlannerAbility

Possible values

- Fire Door Survey
- Kitchen 2nd Fix Electrical
- Kitchen Clean
- Kitchen First Fix Electrical
- Kitchen Fit
- Kitchen Plumbing
- Kitchen Rip Out
- Test1
- Void...

➤

➤

➤

➤

➤

➤

➤

➤


➤




➤


Selected values




- Kitchen Post Inspection
- Kitchen Survey
- Void Post Inspection


Click Save and your changes will be committed to your resource.

 Abilities

Project Planner abilities : Kitchen Survey, Void Pre Inspection,   

Language : 

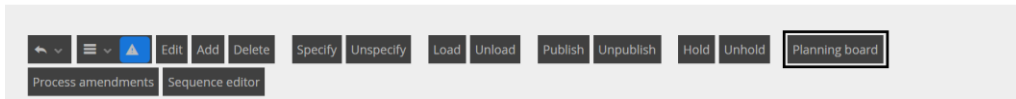
TEAM : VOIDS,   

SKILL : 

Viewing your Planning Board

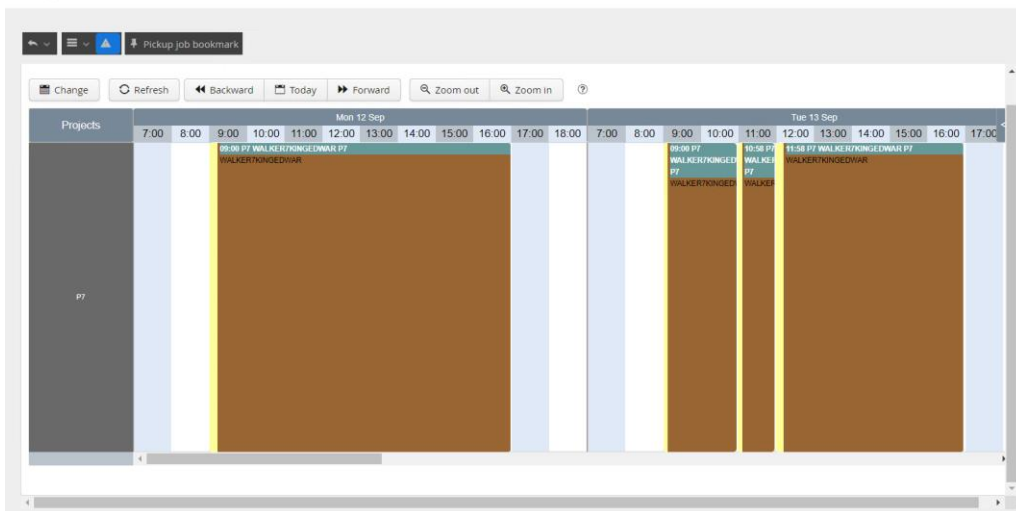
It is possible to view your scheduled plan from many places within Project Planner. This can generally be achieved by selecting the objects which you are interested in and clicking the Planning Board button.

Projects



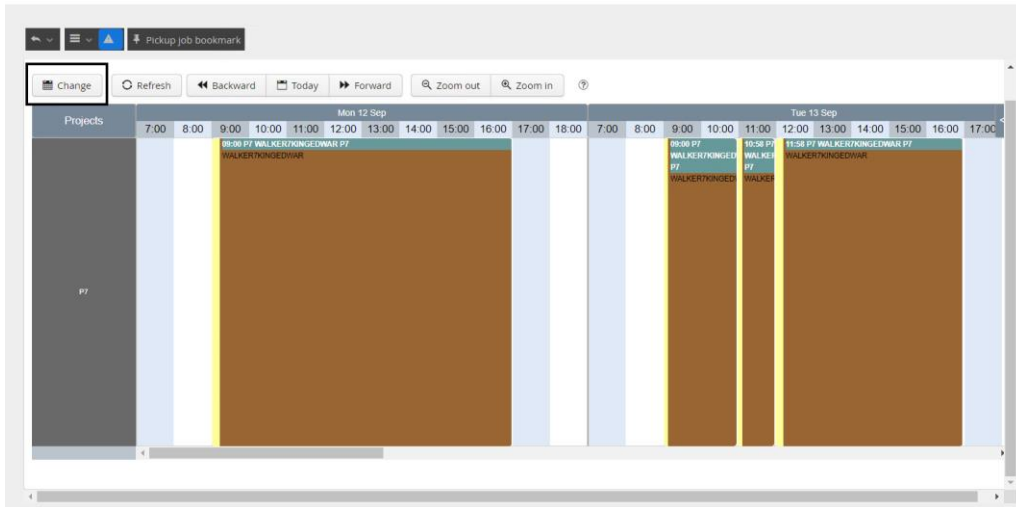
In these cases, the Planning board will be displayed with your selected items.

Diary



The Planning board can be viewed by Project, Customer or Resource by clicking the Change button.

Diary



Fixes

DRS – 6657 DRS / PP API error.

In the PP web beta it was observed that when integrated with Northgate and ROCC completions were not correctly processing into Northgate.

This was discovered to be caused by 2 issues which have been corrected.

- 1) The default.properties file was missing the setting database.customerdbalias
- 2) The background service was incorrectly trying to user details from tblAddressLines rather than using the connector database.

DRS – 6647 'Too Many Connections' MySQL Error

For some customers it was discovered that TomcatxSUI was using an exceptional number of MySQL connections which would occasionally lead to services outages.

An overall reorganization in the way SUI manages database connections done which has resolved the issue.

DRS – 6628 Not able to import data

When upgrading to 6.1.0 it was discovered that some users could have issues when importing their data. This was due to some incorrect data.

When importing it is required to SOR templates have the field OPT_WORK_CLASSIFICATION_ID populated with a number.

As a fix, if during the import process any SOR templates are found with incorrect values in this field the process will continue but the OPT_PROJECT_PACKAGE_TEMPLATE for that specific SOR code will not be updated.

DRS – 6531 Error when trying to get worker list

When the Sector filter was saved as a part of the view for the first view displayed this would cause an error and the workers page would not be correctly displayed.

This has been corrected and now the workers view should always open and display data without error.

DRS – 5992 Issues with meetings

Several issues with meetings were resulting in poor user experiences. These have now been corrected in the following ways:

- 1) Creating a meeting with no appointment time, will now reset the appointment time to it's default value (Today : 8:00 to 18:00)
- 2) Some slightly confusing behaviour has been clarified with button name changes, the available options are now 'Save and check availability' and 'Save and Schedule' so Users understand in both instances the meeting is created and saved.
- 3) When selecting a meeting room then clicking the add button, the meeting room and agency were not correctly populated. This has been corrected the user's previous selection will be shown.

DRS – 6449 Working hours calendar with no days

Creating a working hours calendar with no available days and attempting to add it to a worker results in an poorly handled error message.

This has now been altered so that the user is correctly informed that they must set at least one day to be available.

DRS – 6332 Add object prefix to columns added to grid

When adding columns such as an Id field to a grid the column name will just be 'Id' with no reference to the object it is the Id for. This means that when multiple similar columns are added it can become very difficult to know what each column represents from their title.

This has been altered so that Columns are now titles with a prefix of the object they refer to so for example the column for customer id will now be titled 'Customer Id' rather than just 'Id'

DRS – 6322 PP Worker external key does not save

It was possible to modify a Project Planner Worker or Operative's External Key value although it would not save.

This field has now been made both Read only and hidden by default on the PM profile level

DRS – 6185 Multi day and Multi trade issues

MultiDay and MultiTrade settings were causing some confusion with their expected behavior and dependency on each other.

This has now been altered to allow the following combinations of behaviors:

If multi trade is false and multi day is true

- Multiple jobs created because the total duration is beyond the full day total will work
- Multiple jobs created because more than one template is provided will fail

If multi trade is true and multi day is false

- Multiple jobs created because the total duration is beyond the full day total will fail
- Multiple jobs created because more than one template is provided will work

If multi trade is true and multi day is true

- Multiple jobs created because the total duration is beyond the full day total will work
- Multiple jobs created because more than one template is provided will work

If multi trade is false and multi day is false

- Multiple jobs created because the total duration is beyond the full day total will fail
- Multiple jobs created because more than one template is provided will fail

DRS – 5761 Mapping server does not display all map tiles at certain zoom levels

At some zoom levels the mapping server was unable to display certain map tiles. This was being caused by missing / corrupt data on the mapping server, this has now been corrected and all map tiles should display correctly at all zoom levels.

DRS – 5897 Display mode and Display type columns using incorrect type

Within the Diary bookmarks list in the configuration menu the Display mode and Display type fields were incorrectly using An unformatted string.

This has been changed to use autogenerated Enums (DiaryDisplayMode and DiaryMinWidth) and should now show correctly in a list.

DRS – 4803 MySQL connection pooling improvements

Database access to OTWSG, XMBTools and OBS have been changed to use the hikari library which will improve connection pooling for the application.

Release list of Components

Internal Component Versions



Function	Version
DRS Server (Kernel)	6.3.1.9
Background Service	6.1.0.8
Connector Services	6.1.0.8
Inbound Connector	6.1.0.8
Mobile Gateway	6.1.0.8
Project Planner	6.1.0.8
Utility Service	6.1.0.8
DRS Web Services Gateway	6.1.0.8
Archive/Housekeeping	6.1.0.8
UK Geocoding Postcode Database	07/2022

External Component Versions

Description	Version
Apache	2.4.55.0
Java	8.362.08.1
MariaDB	10.3.36.0
php	8.2.3
Tomcat	9.0.71.0
Tomcat Native	2.0.3.0
.Net	4.7
SoapUI	5.5.0

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- Visit the [Support Portal](#) 
- Make a general enquiry on 03300 602 102
- Contact us via the [Advanced website](#) 

More information

w [oneadvanced.com](https://www.oneadvanced.com)
t 03300 602 102

The Mailbox, Level 3, 101 Wharfside Street, Birmingham, B1 1RF

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