

Setup Guide

Direct Planning

Planning software for industry, project management or service

version 4.x

http://www.directplanning.com

www.volume-software.com

Last revision : November 2024



1 Boulevard Heurteloup 37000 Tours France

Contents

. Prerequisites
Hardware requirements
Software requirements
Preparing the license
CREATING USERS
Simultaneous usage in modification by multiple users
. Installing Direct Planning
. Registering the Direct Planning license11
Entering an activation key12
Connecting to a license server13
OPENING THE SCHEDULE

1. Prerequisites

Hardware requirements

Processor	3 Ghz (2 Ghz min.)
RAM	16 Gb (8 Gb min.)
Display Resolution	 1920 x 1080 pixels For the planner's computer: A powerful graphics card with 2 video outputs provides optimal response times. Two 24-inch or larger screens. Direct Planning offers features where two screens greatly improve the ergonomics of the workstation; for example, viewing the schedule on the left screen and a list of jobs on the right screen.
Disk Space	 10 GB for a "complete" installation on the workstation where the planning database is stored (automated SQL Server Express installation) 200 MB for "minimal" installation on user workstations

Software requirements

Misc.	Microsoft .NET Framework 4.8 component has to be installed on your computer. Upon installation of Direct Planning, if it is not the case, you'll be automatically redirected to the down- load page.
	To install Microsoft SQL Server on Microsoft Windows 11, you must first modify the workstation registry.
	1. Go to the page Computer\HKEY_LOCAL_MACHINE\ SYSTEM\CurrentControlSet\Services\stornvme\Parameters\ Device.
	2. On the Modify menu, point to New, then select Mul- ti-string value. Name it ForcedPhysicalSectorSizeInBytes.
	3. Modify the new value, typing "* 4095". Select OK and close the Registry Editor.

Remarque :

- Windows Server 2012 and 2012 R2 will no longer be supported by Microsoft on October 10, 2023.

You must be have access to the following information :

- The path of the directory where the VLA license file is stored
- The network identifier of the station to setup
- The Windows login of the station user
- The name of the database server where the schedule is located (for network installations)

2. Preparing the license

Launch Volume Licence Administration (VLA), connect to the license directory, select the Direct Planning Configuration and click on **Configuration detail**:

Volume Licence	e Administrat	tion 1.1		A COMPANY AND	-	
File ?						
Directory of licen	ices :		\\volupc12\vla_volumesoftware			
Documentation	n 🖂 Apply f	or a licence		😭 New config	guration 📄 Co	onfiguration detai
Product	Config [Description		Nb perm. user	Nb temp. user	Temp. end dat
DirectPlanning	1 0	DirectPlanning	Configuration	0/10	0/5	31/12/2018
						Close
					Ve	rsion : 1.1.0.6680

When replacing an existing station, select the line of the replaced machine and click the **Modify** button.

To add another station, you must have a free licensing slot available (permanent or temporary) and click the **Add** button:

Configuration of licences for	DirectPlanning 3.0							
Configuration #:	1 DirectPlanning	g Configuration	Modify name]			Options)
Status of licence:	Valid licence		See licence	New licence Set Define access pass		sword		
Permanent accreditations	1 / 10							
Temporary accreditations	0/5	Expires on: 31/12/2018						
ist of accreditations 🖼 Excel ex	port -				Sed 🖂	Modify	× Delete	Toggle to
						Incury	Permanent	Temporary
Type Machine Window Use	er name			_≜ Site	User.Nbr	Last use	Modification	Modification
Perm. VSW-P01 p.dupo Dup	ond Pierre			Tours			7	
arama vorrier piopeil ou				(odia			(Transf)	antes.
1 / 15							1/5	0 / 2
Enable VSW mode					Save	and quit		Cancel

A named license is assigned to a <u>machine/user</u> pair.

Populate all white fields . Please note that if the machine and Windows login fields are invalid, the license will not work.

ldentifier :			
Machine:	🕜 VSW-P01	Date of creation:	1
∿indows login:	🕜 p.dupond	Date of last use:	
Name:	Dupond	End date of accreditation:	8
First name:	Pierre	Total number of uses:	
Site:	Tours		
alated type of licence:	Permanent		
		Cause and mit	Consel

3. Creating users

When adding a new station, the latter does not always allow to open the schedule with modify access. Either because this is a read-only license or because the schedule is reserved by another user. It is therefore recommended to anticipate this potential blocking by creating the user before the installation, while it is available for modification.

User management is performed via the List of users menu.

Administration	\$
This menu is available from the ribbon, under the Configuration > Users tab	
Users Users	

3	List of us	ers				- 0	X
0	i 🗐 🖾 E	export Excel 👻			6	New 📋 😭 Moo	dify 🙀
] See inac	tive					
							×
#	Login	Name	Fisrt name	Access level	Active	Default display	
1	0 admin	Administrateur		Super user	1	Planning	

Because no user have yet been created, this list is still empty except for you, the administrator. Click on **New** to create users:

Creation: User User Options utilisateur Allowed display modes User configurable lists Identification Identifier Login Name Fisrt name Email V Utilisateur actif	Set password New paseword Confirm password	
Schedule access level Super-user Access for modification Access for restricted modification Access for consultation	Privleges Configure schedule Use scheduling (if active licence) Manage technical data Manage calendars Manage entities	4
		Save and Close Cancel

The first tab **User** allows to enter basic information about the user. It consists of 4 zones.

- ① User credentials: Identifier (automatic and non-editable), Login (required and non-editable), Surname (required and editable), Forename (optional and editable), Email (optional and editable) and Active user (checked and editable).
- ② User password (required and editable).

③ Direct Planning access level:

• Super-user (admin): Always created automatically for any new schedule, it cannot be deleted. It is strongly recommended to modify the associated default password (admin) when creating the schedule.

He has all privileges (4), and none of them can be waived from him. Only he can grant the same rights to another user.

- Users with Access for modification rights can schedule jobs and modify the schedule.
 Their privileges (④) are those granted by the administrator.
- Users with Access for restricted modification rights have no privileges (④).
 It typically designates a production operator reporting a progress status to the planning manager or an operator updating certain flags after receiving material or tools.

This type of access allows to:

- Update the declaration of production (performed quantity and duration)
- Modify flags (except notes)
- Create user alerts in job details (Declaration of production tab)
- Modify job description and configurable areas

Among other things, it does not allow to modify:

- Anything regarding the placement of jobs in the schedule
- The planned quantity and duration
- Technical elements

Caution: Creating users with access for restricted modification requires to enable the automatic import function in the **Configuration** > **General configuration** > **Automatic import** menu.

4 Privileges granted to users (see above).

- Configure schedule: allows users to access the **Configuration** tab, notably to manage users.
- Use scheduling: the scheduling function is no longer maintained. The corresponding privilege is therefore outdated and will be removed from the next version of Direct Planning.
- Manage technical data: unchecking this box allows users to view (but NOT modify) the resources (project mode), sections/machines, working units.
- Manage calendars: unchecking this box allows users to view (but NOT modify) the characteristics of calendars (standard days, standard weeks, machine operating times). More information about these notions in section 5.5 *Managing calendars*.
- Manage entities: unchecking this box allows users to view (but NOT modify) entities.

on schedule oneni	no automatically move t	to current date and time (rather than moving to the most recently used dat
an activulate opena	ng, automatically move i	to current date and time (rearier marrinoring to the most occurry ascarda
omatic updating o	f a schedule opened for (consultation (if user inactive for some time).
	on schedule openi omatic updating o	in schedule opening, automatically move omatic updating of a schedule opened for

The second tab, **User options** allows the definition of opening and positioning options in the schedule. Users can modify these setting under **File** > **User options** > **For this schedule**.

lser	Options utilisateur	Allowed display modes	User configurable lists		
Sele	ct the user's default (display mode:		Planning	*
Selec	t the display modes	this user will have acce	ess to:		
-	Planning				
1. 12	Endineera / stones	e verification			

The third tab, **Allowed display modes** allows to select the display modes available to selected users. This option is useful to display only the relevant sections/machines.

Cre	ation: User			
User	Options utilisateur	Allowed display modes	User configurable lists	
Selec	t the configurable lis Milling planning Processing planning Finishing planning List of jobs on alert	sts this user will have a	ccess to:	

Similarly, the **User configurable lists** tab is used to filter the lists of jobs available to users. In the same fashion, the objective is to select the relevant lists to their usage. More information about configurable lists in the next section.

When you are done creating/modifying users, click on **Save and close**.

Simultaneous usage in modification by multiple users

If your login benefits from the modification authorisation, you open the schedule systematically in modification.

 If nobody has opened the schedule in modification before you, you habe the access in modification. If you do not have any modification to make, or if you have finished them, you can switch to consultation mode :

1	3974	۵.							
File	Home	Edit	Display	Planning assistance	Status	Data	Calendars	Configuration	?
Your acce	ss mode	M	odification			1			
Status of s	schedule	Cu	irrently mod	ified by MARTIN Daniel			🐻 Switch t	to consultation mo	de
🖸 Notifi	cation					~			

- 2. If another user is already making modifications :
 - This user will be notified of your connection attempt
 - You will be connected to the schedule in consultation
 - You will be notified when the access in modification will be freed and available again
 - You will then be able to use the **Status** tab to **Switch to consultation mode**

4. Installing Direct Planning

Start the Direct Planning setup program and follow the on-screen directions.

When choosing the type of installation, select "Full" to install the database server station and "Minimum" to install a client station.



When the setup completes, you can launch Direct Planning 3.

5. Registering the Direct Planning license

Caution: You may have to launch Direct Planning with administration rights (right-click on shortcut and select **Run as administrator**).

After the first start, Direct Planning is in trial version, valid for 30 days from the installation date. This screen acts as a reminder each time you start Direct Planning and the software is not registered. You can also display this screen by selecting *About* in the "?" menu.

	DirectPlan	ning
Version	DirectPlanning @ 3.4.0.6890	
Web	www.directplanning.com Facebook Twitter	
Licence	License is wrong or not registered. [0207] The evaluation period of Dire Please contact Volume Software to g evaluation period.	ectPlanning is over. get this product or to extend your
	Enter licence	Request a license by email
Copyright © Vo Nbbon based o Varning this softwa Sforbidden, Anyone	olume Software on the work of José Manuel Menéndez Poo (re is protected by copyright laws and by international conv e not respecting these conditions will be guity of infringent	www.menendezpoo.com). entions . Any reproduction or partial or full distribution ent offence and will be liable to prosecution.
System	information	Close

▲ When the 30 day trial expires, running your software requires a license.

Click on Enter License or Request a license by email to activate Direct Planning.

Direct Planning can be activated by entering a local activation key or by connecting to license server (explained later).

			Direct	tPlanni	ng 3	
Station key :	LY93	D5 ZY	ER2B	OPLB	8X1A	Copy the workstation key New license
Descrip Status :	tion :					
						Liede

Write down or copy your station key, and transmit it to Volume Software to obtain an activation key. When you receive your activation key, click on **New license...** to enter it manually or paste it:

		Dire	ctPlann	ning 3		
Station key :	LY93	D5ZY	ER2B	OPLB	8X1A	
Activation Key :				ii		

Connecting to a license server

Volume Licence Administration (VLA) must first be installed and configured (please refer to the documentation of this product).

Click on Connect to a named license server:

DirectPlanning 3	
Station key : LY93 D5ZY ER2B OPLB 8X1A Copy the workstation key	
C Local activation keys : New license	
Description : Status :	
Connect to a named licence server.	
License status : License is wrong or not registered. [0207] The evaluation period of DirectPlanning is over. Please contact Volume Software to get this product or to extend your evaluation period.	
Close	
Select On the computer. You can enter the	
computer name directly or search for it on the network via the dropdown menu.	
Check validity of this file	
Valid file Function test Name of machine: VOLUPC12 Windows login: E.cathelin Check licence for this pair	Click on to search for the Named licence server file. Two buttons can also be used to check the validity of the selected file as well as
	the license for the Machine/Login

Save and Quit: Direct Planning is now registered.

Each schedule is identified with a number (the creation sequence) and a designation. Open the dropdown menu to select the desired schedule and click on **Open this schedule**.

6. Opening the schedule

To open a schedule, click on **File > Open** and follow these steps:



Selection of host computer	
Selection of host compute	
Please select the computer hostir	g the schedule you want to open.
Open a schedule located:	
On computer:	iaining
	Service Se
	Previous Next 🜩 Cancel

Selection of schedule	
Please select the schedule to open.	
	NINITI NO
Number and name of schedule :	[23] Demo schedule
	Diapping
	Direcgrianning
	TIME
	Previous Open this schedule Cancel