



## Setup Guide

# Direct Planning

Planning software for industry, project management or service

*version 4.x*

<http://www.directplanning.com>

[www.volume-software.com](http://www.volume-software.com)

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# 1. Prerequisites

## Hardware requirements

<b>Processor</b>	3 Ghz (2 Ghz min.)
<b>RAM</b>	16 Gb (8 Gb min.)
<b>Display Resolution</b>	1920 x 1080 pixels  For the planner's computer: <ul style="list-style-type: none"><li>• A powerful graphics card with 2 video outputs provides optimal response times.</li><li>• 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.</li></ul>
<b>Disk Space</b>	<ul style="list-style-type: none"><li>• 10 GB for a "complete" installation on the workstation where the planning database is stored (automated SQL Server Express installation)</li><li>• 200 MB for "minimal" installation on user workstations</li></ul>

## Software requirements

<b>Operating System</b>	<ul style="list-style-type: none"><li>• Client workstations: Windows 10</li><li>• Server: Windows Server 2012, 2016 and 2019 (The Windows server may not be a domain controller).</li></ul>
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Misc.	<p>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 download page.</p> <p>To install Microsoft SQL Server on Microsoft Windows 11, you must first modify the workstation registry.</p> <ol style="list-style-type: none"><li>1. Go to the page Computer\HKEY_LOCAL_MACHINE\SYSTEM\CurrentControlSet\Services\stornvme\Parameters\Device.</li><li>2. On the Modify menu, point to New, then select Multi-string value. Name it ForcedPhysicalSectorSizeInBytes.</li><li>3. Modify the new value, typing "* 4095". Select OK and close the Registry Editor.</li></ol>
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**Remarque :**

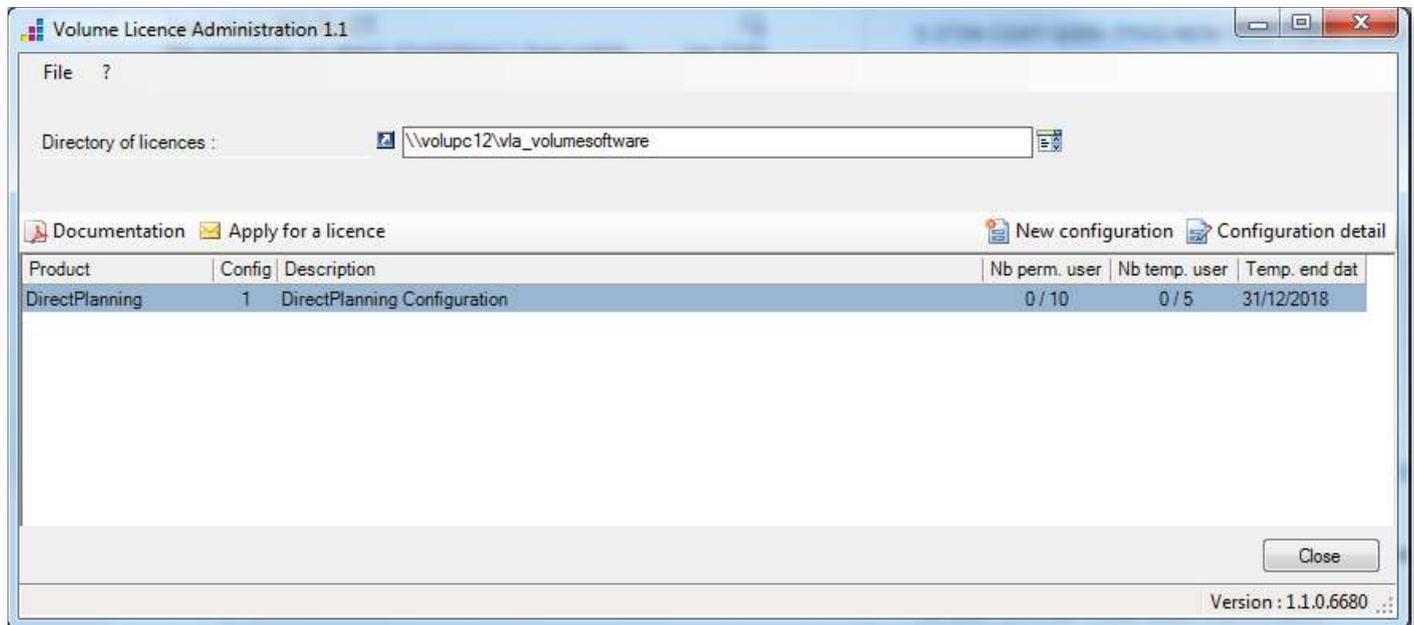
- Windows Server 2012 and 2012 R2 will no longer be supported by Microsoft on October 10, 2023.

You must 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)

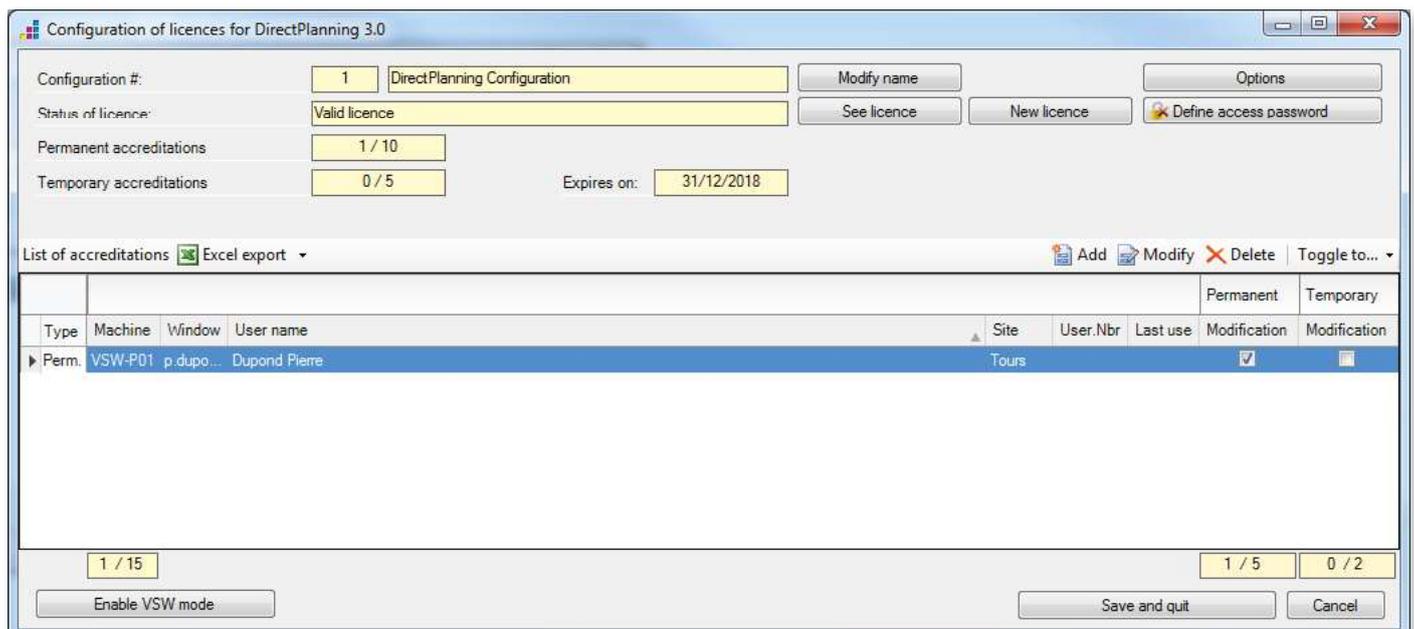
## 2. Preparing the license

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



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:



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

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

Creation of a named licence

*Identifier :*

Machine:

Windows login:

Name:

First name:

Site:

Related type of licence:  Permanent  Temporary

Date of creation:

Date of last use:

End date of accreditation:

Total number of uses:

Save and quit Cancel

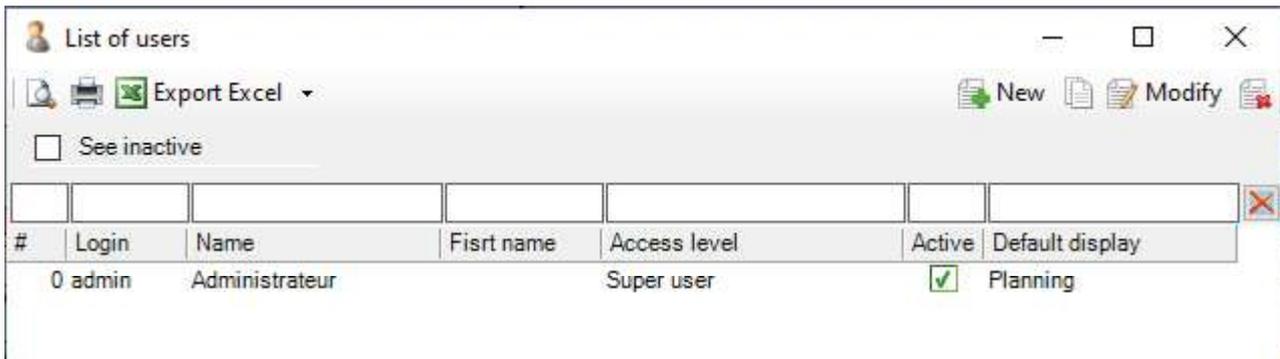
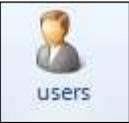
### 3. Creating users

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.

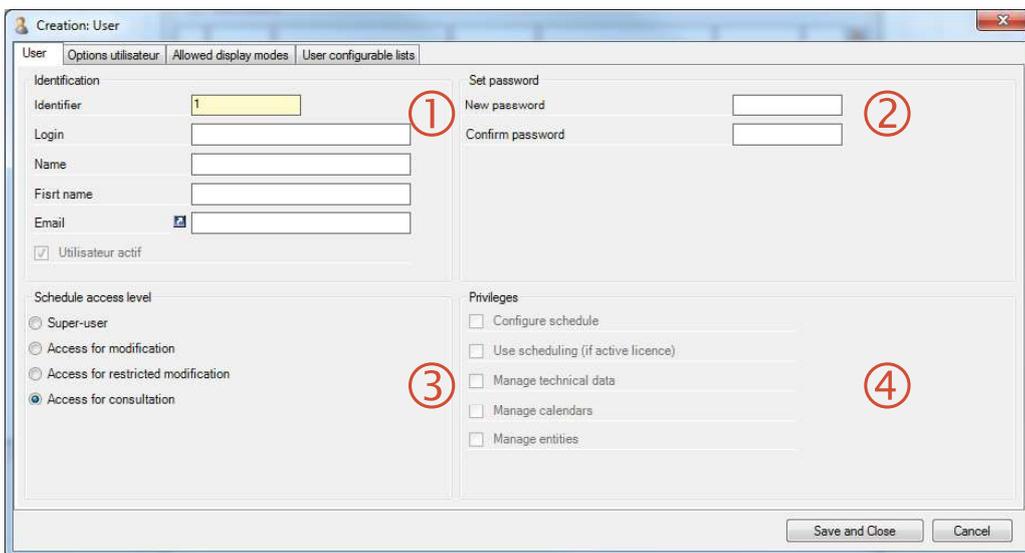
**ADMINISTRATION** 

This menu is available from the ribbon, under the **Configuration > Users** tab



#	Login	Name	Fisrt name	Access level	Active	Default display
0	admin	Administrateur		Super user	<input checked="" type="checkbox"/>	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: 1 (1)

Set password

New password: (2)

Confirm password: (2)

Schedule access level

Super-user

Access for modification

Access for restricted modification

Access for consultation (3)

Privileges

Configure schedule (4)

Use scheduling (if active licence)

Manage technical data (4)

Manage calendars

Manage entities

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

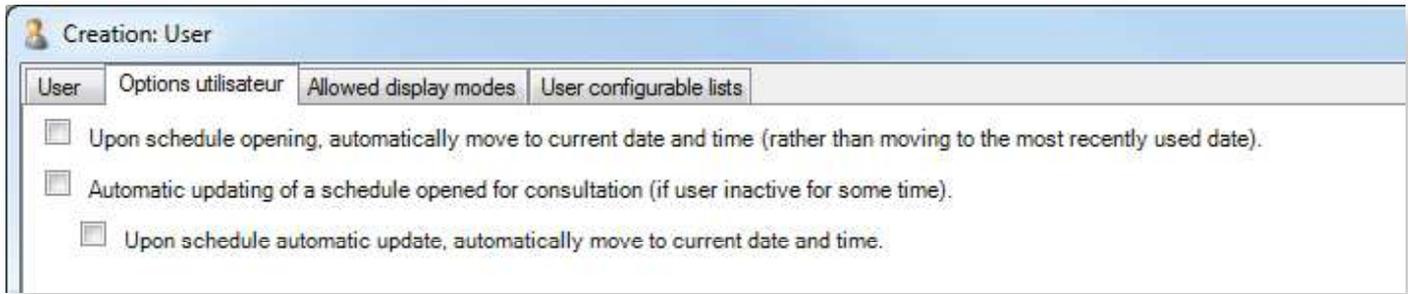
Among other things, it does not allow to modify:

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

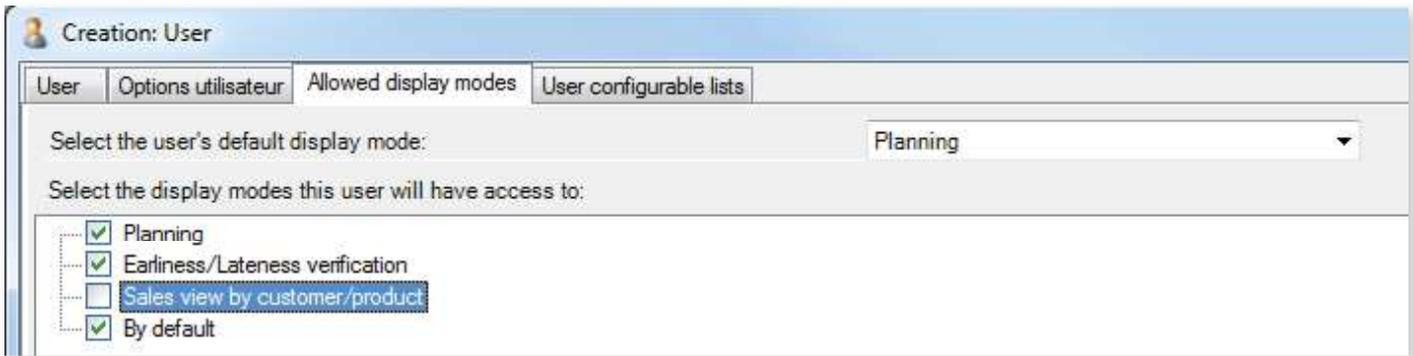
**Caution:** Creating users with access for restricted modification requires to enable the automatic import function in the **Configuration > General configuration > Automatic import** menu.

④ Privileges granted to users (see above).

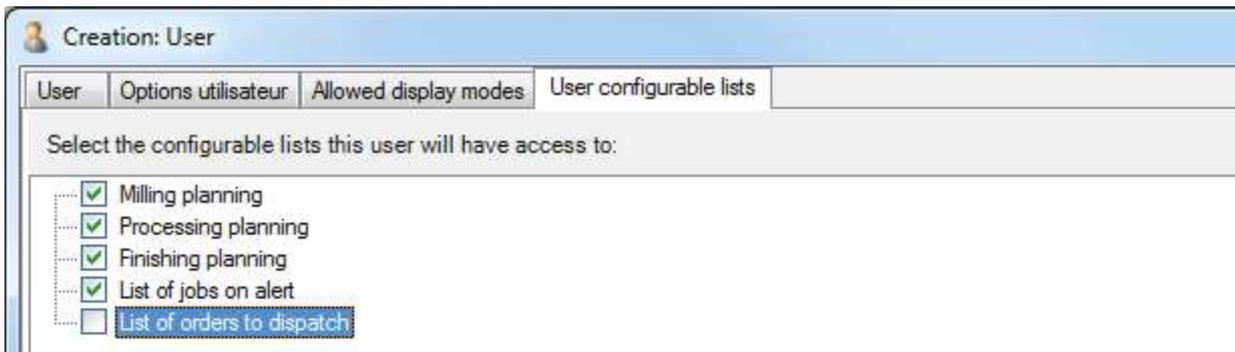
- Configure schedule: allows users to access the **Configuration** tab, notably to manage users.
- Use scheduling: the scheduling function is no longer maintained. The corresponding privilege is therefore outdated and will be removed from the next version of Direct Planning.
- Manage technical data: 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.



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**.



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.



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.

1. If nobody has opened the schedule in modification before you, you have 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 :

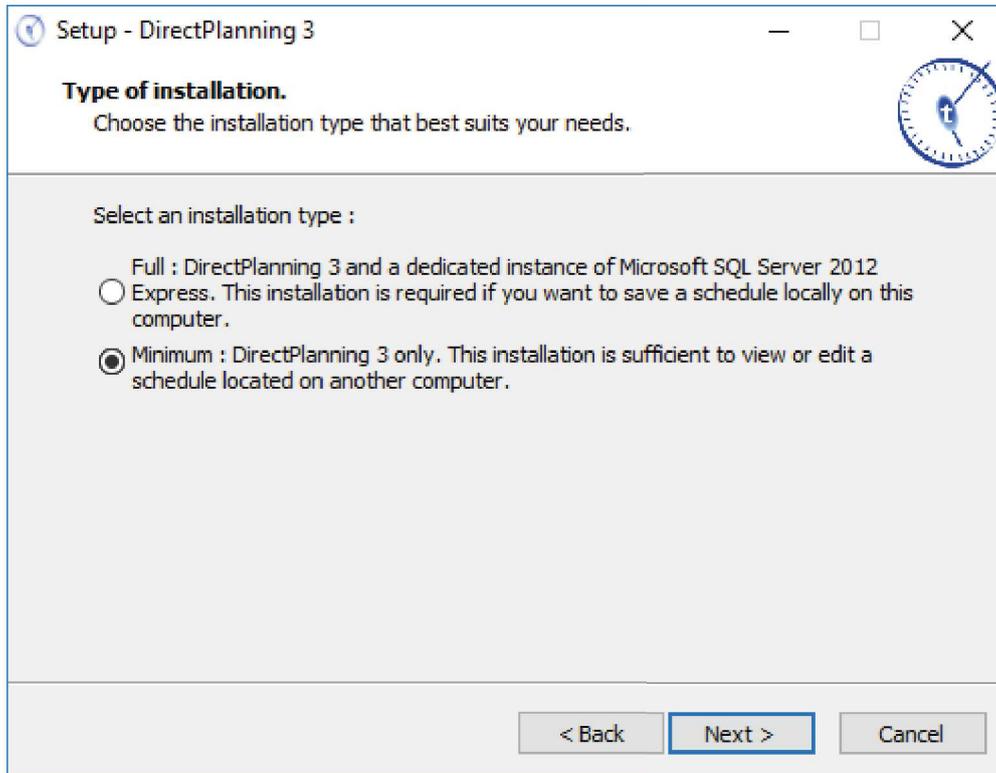


2. If another user is already making modifications :
  - This user will be notified of your connection attempt
  - You will be connected to the schedule in consultation
  - You will be notified when the access in modification will be freed and available again
  - You will then be able to use the **Status**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

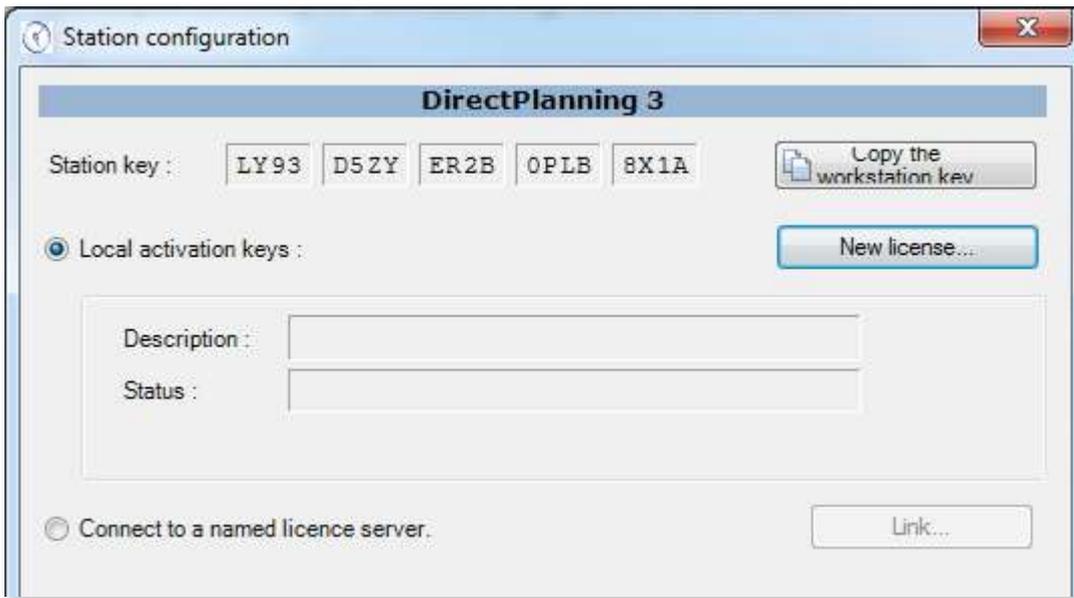


▲ When the 30 day trial expires, running your software requires a license.

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).

Entering an activation key



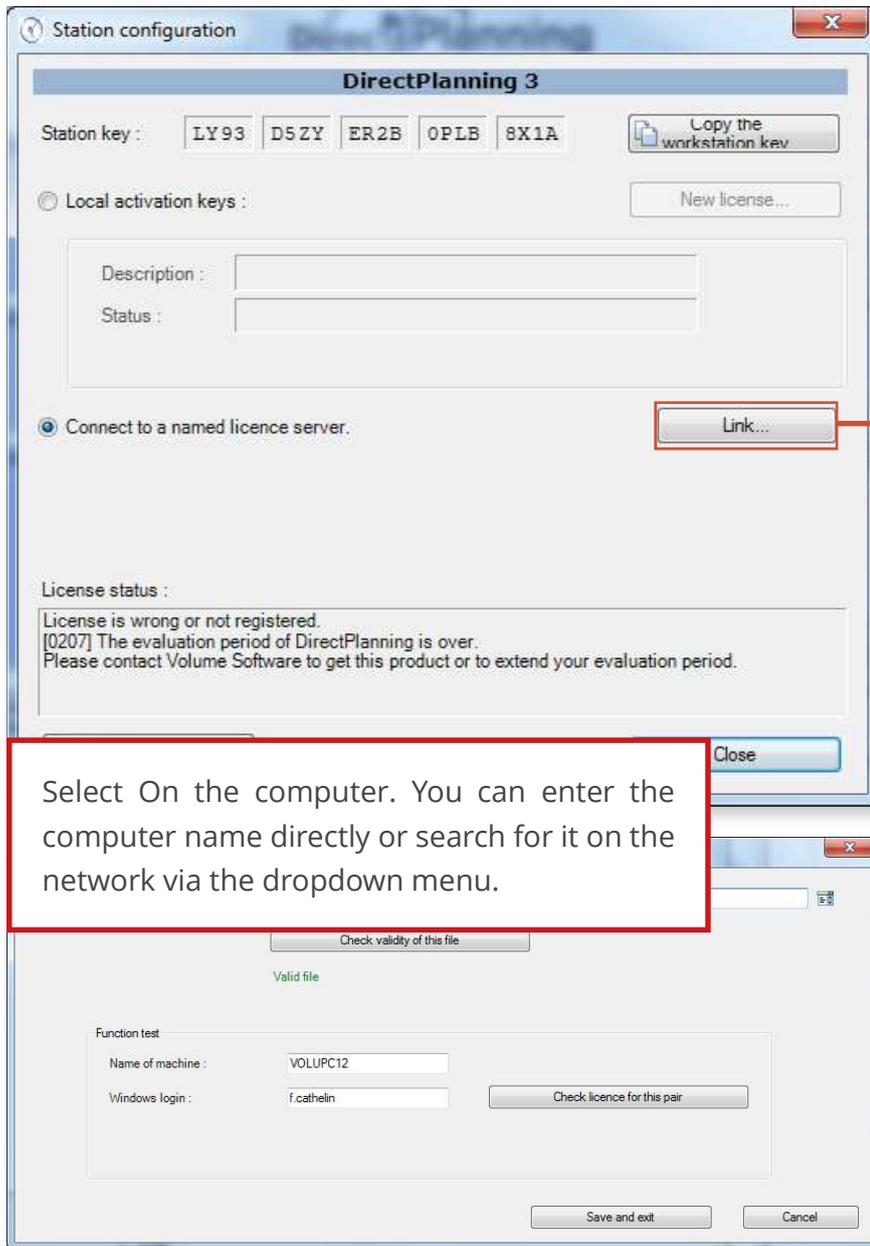
Write down or copy your station key, and transmit it to Volume Software to obtain an activation key. When you receive your activation key, click on **New license...** to enter it manually or paste it:



## 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**:



Select On the computer. You can enter the computer name directly or search for it on the network via the dropdown menu.

◀ 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 pair.

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 media type to open**

**Welcome in the schedule open wizard.**

What do you want to do?

- Open a schedule
- Open a demonstration schedule
- Open a Direct Planning 3 (.dpl2, .mdpl2) file
- Import a Direct Planning 1.2 schedule (.dpl)

Select Open a schedule

**Selection of host computer**

**Selection of host computer**

Please select the computer hosting the schedule you want to open.

Open a schedule located:

- On my computer (VOLUPC12)
- On computer:

Previous Next Cancel

**Selection of schedule**

**Please select the schedule to open.**

Number and name of schedule :

Previous Open this schedule Cancel