HANSAWORLD
UNIVERSITY

Enterprise by HansaWorld

Resource Planner

Version 7.2 Mac OS

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HANSAWORLD

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THE RESOURCE PLANNING MODULE

The Resource Planning module has been designed to provide HansaWorld customers with a graphical planner. Users have a quick and friendly access point from which they can see the status of the company's resources, whether those are employees, board rooms, items such as motor vehicles etc.

Monthly, weekly, daily and even hourly views are displayed in the Resource Planner grid, making it the perfect solution in order to have an overview of the availability and general status of the resources.

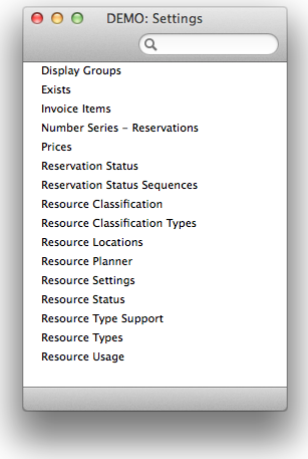
HansaWorld's Resource Planning module is fully integrated. It can be configured to work with the following modules: CRM, Job Costing, Production, Rental and Hotel.

This document describes likely scenarios of workflows involving the Resource Planning module, in conjunction with the first four modules listed above.

Additionally a brief introduction is provided for the Resource Planning that relates to the Hotel module. For complete information about the integration of Resource Planning and the Hotel module, please contact your local HansaWorld office.

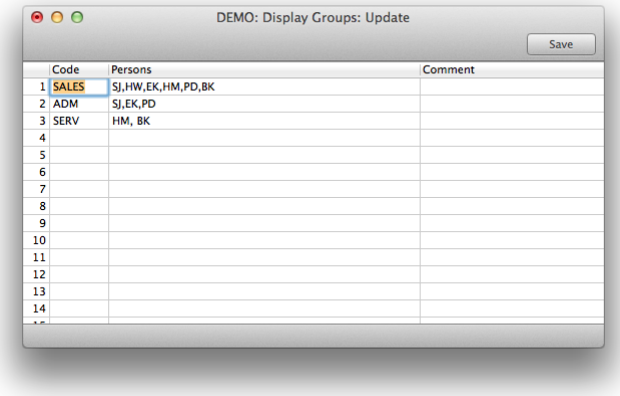
Settings

The Resource Planning module has the following settings:



Display Groups

This setting allows you to divide the users (employees) into groups that can later be displayed in the resource planner. These groups could represent the different types of work or departments within the company.



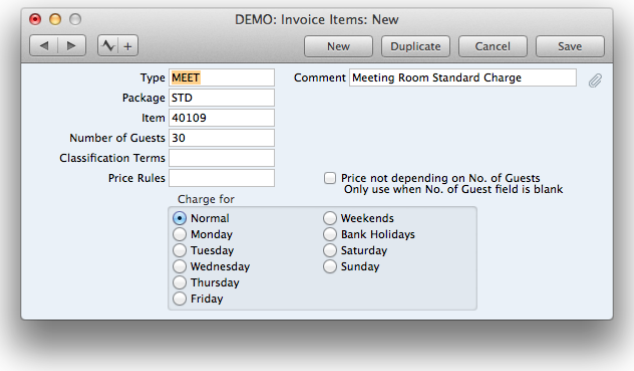
Code: Specify a unique Code for each Display Group.

Person: Paste Special, using the Person register. The initials of each Person that belongs to the Display Group separated by commas.

If you need to use 'Paste Special' to enter several sets of initials, type the comma before opening the 'Paste Special' list.

One Person can belong to more than one Display Group, as shown in the picture.

Invoice Items



Invoice Items is the same setting that can be found in the Hotel module. This setting is used to determine the Item and therefore the price that will be used on the Reservation. HansaWorld attempts to match the Package, Type and Person from the reservation to this Invoice Item setting record. When found the Item's price is used as the Reservation's price.

Importantly this setting includes the ability to specify applicable days, which therefore allow for a reservation price to be set for a specific day of the week, weekends and Bank Holidays.

Type: Paste Special to the Paste Resource Type window

Package: Paste Special to the Paste Resource Usage window.

Item: Paste Special to the Item, which will be used for the Invoice and would determine what price the system should use.

Number of Guests: Indicate the number of guest. This will be used when the 'charging per person' functionality is used.

Price not depending on No. Of Guests: When this checkbox is ticked the price will be for the room. This is irrespective of the number of guests.

Comment: Enter the description for the Invoice Item record

Charge for : You can have different prices for different days, weekends and Bank holidays.

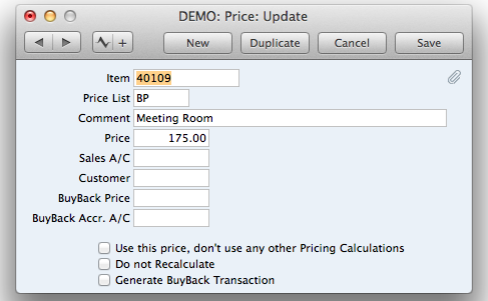
Number Series – Reservations

Use this setting to define the number sequences for the Reservation records. The different series should not overlap. If a Number Series is not defined then the assigned Reservation number will start at 1 and will continue consecutively for each new Reservation.

Different series can be specified for specific periods, thus allowing for a new series every year.

Prices

This setting is the same as the Prices register in the Pricing module. The records in this setting are usually created by running the Maintenance "Calculate Price Lists", or can also be entered manually.



It is possible to have several Price records for the same Item, usually this is done by using a different Price List each time.

Item: Paste Special to the Paste Item window to choose the correct Item.

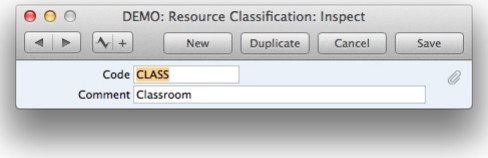
Price List: Paste Special to the Paste Price List window. Remember that you can specify if the Prices would be TAX Exclusive or Inclusive on the Price List record.

Comment: The Item Description.

Price: If the Prices were created by the Calculate Price Lists maintenance, then this field is automatically filled.

If the former is not the case, then the price can be entered manually.

Resource Classification

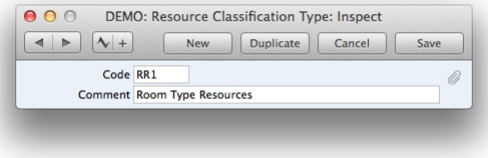


In this setting you can define any number of Classifications that later on will be used to classify the Resources.

Code: Enter a unique code in this field, it can be up to 10 alphanumeric characters. It is recommended however that you use shorter codes in order to be able to use more than one or two classifications per resource.

Comment: Enter the description for the Classification.

Resource Classification Types



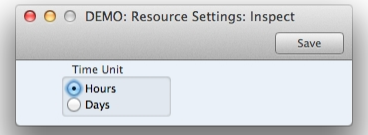
In this setting you can divide the Room Classifications into different groups.

Code: Enter a unique code in this field for the Classification Type.

Comment: Type the description for the Classification Type.

Resource Settings

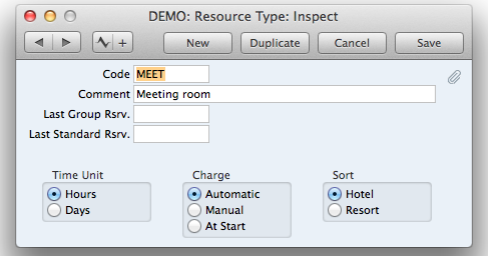
This setting allows you to specify the default resource charge type as either per: “Hours” or “Days”. If the radio button has been set as Days, then all new Resources created would be set to days.



Resource Types

Normally you will have different types of resources. For example when used in conjunction with the Hotel module these types could be: single, double and honeymoon suites.

This setting allows you to have several resources types.



Code: Enter a unique code in this field for the Resource Type. The Code can only have five alphanumeric characters.

Comment: Type the description for the Resource Type.

Time Unit: By using these radio buttons you can choose which Time Unit to use, the options are Hours and Days.

Charge: Select the type of Charge for this Resource Type: Automatic, Manual and At Start.

Automatic: The Nightly Maintenance routine will invoice the Room.

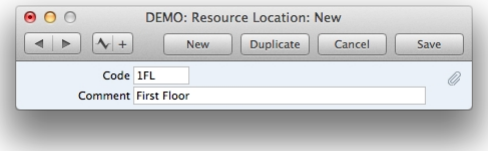
Manual: The option Charge stay from the Operations menu in the Reservation should be used to create the charges.

At Start: If this option was selected it will not be possible to run the Nightly Maintenance routine for this Resource Type. Only manual charges will be allowed.

Sort: Select whether to use for Hotel or Resort.

Resource Locations

The Locations setting allows you to define any number of Locations.

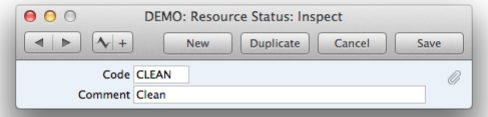


Code: Enter a unique code in this field for the Resource Location. The Code can only have five alphanumeric characters.

Comment: Type the description for the Resource Location.

Resource Status

In this setting you can define all the possible statuses of the Resources.

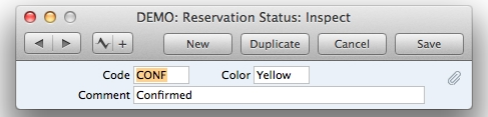


Code: Enter a unique code in this field for the Resource Status. The Code can only have five alphanumeric characters.

Comment: Type the description for the Resource Status.

Reservation Status

The reservation status is used in the reservation register and is one of the most important settings. This setting controls the availability of the resources. According to what you set up here the Resource Planning window will display each resource in a different color. This therefore provides a visual overview of resource availability.



Code: Enter a unique code in this field for the Reservation Status. The Code can only have five alphanumeric characters.

Comment: Enter the description for the Reservation Status.

Color: All the resources belonging to the same Reservation Status will appear in the same color in the Resource Planning window.

Use Paste Special to choose the color of your preference.

Document: If you need or wish to use a specific Form for a particular Reservation Status, specify in this field the Document that will be linked to it.

Type: The different types can be:

Normal (not checked in): This is the normal status for a Reservation and it implies that the resource can be reserved.

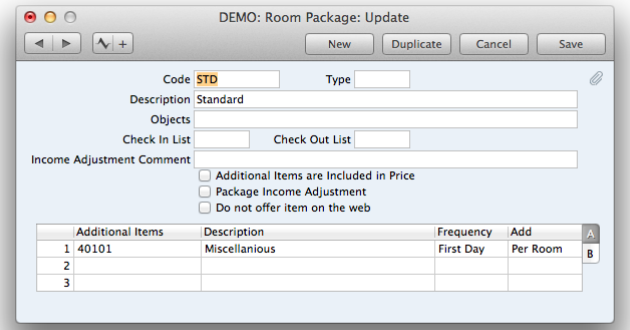
Unconfirmed: This status creates a booked reservation in a non-confirmed state (a preliminary booking).

Cancelled: This status implies that a guest (in the case of a hotel) has cancelled his/her reservation. It will prompt for the Reservation to be removed from the Resource window. This status can be applied manually.

Normal (checked in): This type allows the reservation to be charged.

Resource Usage

The Resource Usage setting behaves similarly to the Room Package setting in the Hotel Module. Here you can set different packages for your customers, each package can have different prices and benefits.



Code: Enter a unique code in this field for the Record. The Code can only have five alphanumeric characters

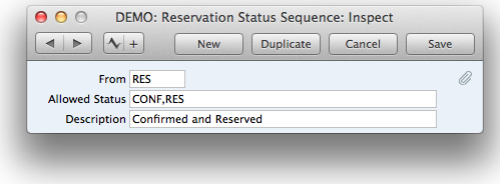
Description: Type in the description for this package.

Additional Items Code/Frequency/Per Room or Per Guest: Paste Special and add different items for this package, you can also select the frequency for example: everyday, first day, last day as well as set up the package per guest or per room.

Reservation Status Sequences

The Reservation Status Sequence is important because it defines the workflow of the Reservation Statuses. This ensures that the user assigns the correct status to the Reservation.

In this setting it is possible to include more than one exit status for each sequence. E.g. if a Reservation is Reserved then its status can only be changed to Confirmed or Reserved.

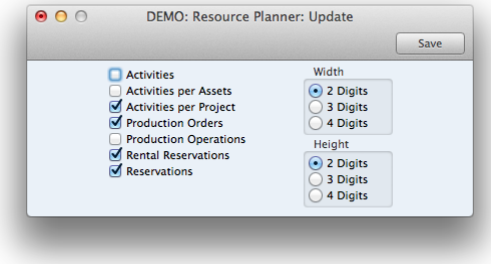


From: Paste Special to the Paste Special Reservation Status, select the Status where the sequence starts (example Check In, or Reserved)

Allowed Status: Paste Special and add all the Reservation Status that will be allowed for this sequence. Separate multiple options with commas.

Description: Enter the description that best fits this sequence.

Resource Planner



This setting allows you to choose which HansaWorld record types should be displayed in the Resource Planner window. Depending on your choices, the information will be provided from different modules of HansaWorld.

The options are:

Activities: Enable Activity records to be displayed on the Graphic Resource Planning window. This should be used in conjunction with Display Groups. (Integration with CRM Module.)

Activities per Assets: Mark this checkbox when you want to display Activities where an Asset was specified in the Asset field in the Resource Card of the Activity register.(Integration with CRM and Assets modules.)

Activities per Project: Enable Activities to be displayed per Project Number. (Integration with CRM and Job Costing Module.)

Production Orders: Enable the Machine Use to be displayed here according to the Production Orders created. (Integration with Production Module)

Production Operations: Enable the Machine Use to be displayed here according to the Production Operation created. (Integration with Production Module)

Rental Reservations: Enable the Rental Items Reservations to be displayed here. The information will be structured by the Item Groups set up. (Integration with Rental Module)

Reservations: Enable the Hotel Reservations and Reservation from the Resource Planning module to be displayed.

REGISTERS

Reservations

The Reservation register is the same as the one available from the hotel module when not using the Hotel Interface option. As such you would find some terms and fields used specifically for Hotel Reservations.

Header

In the section for the Header you will find all the information related to the Status, Type, Dates and Prices for the Reservation.

Ser.No.: The Reservation Number given by the system.

Status: This field displays the current Reservation Status. It can be changed manually: Ctrl+ Enter will open the Paste Reservation Status window.

Res. Type: Specify the Resource Type, press Ctrl+ Enter to change the type.

No. of Guests: Enter the number of guests

Start Date: This would be the date the system will consider as the start for all reservation charges. When entering a new Reservation the default will be the current date. Press Ctrl+Enter to change.

End Date: The date the system will use as an end date. Once you have entered this date, the number of days will be calculated automatically and will be used for calculating the Total field value.

Start Time: By default this is the time set in the Reservation Settings (in the Hotel module). However it can be changed manually.

End Time: By default this is the time set in the Reservation Settings (in the Hotel Module). However it can be changed manually.

Package: In this field you can specify the Resource Usage that will be used by pressing Ctrl+Enter and choosing the correct value from the Paste Special list.

Price List: By default the Price List might come from the Customer. It can be changed.

Price: The price that will be charged for the Reservation period.

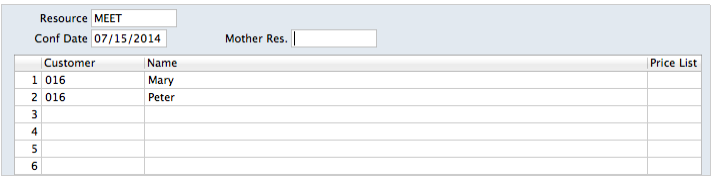
Total: The Total price calculated for the days/nights and the price or agreed price.

Customer: Ctrl+Enter to open the Paste Special window and select a Customer for the Reservation.

Name: The name of the Customer as retrieved from the Customer record.

Guest Card

In this tab you will be able to specify the information related to the Guest or Customer and also the Resource you assigned for him/her.



The matrix will allow you to enter the number of guests that will be using the resource.

NB! Make sure that the number of guests you enter in the matrix is not higher than the number entered on the No. of Guest

field in the header of the record.

Resource: Ctrl+Enter to open the Paste Resource window and enter the Resource.

Conf. Date: Enter the date when the Customer confirms the Reservation to you. Ctrl+Enter to open the Paste Special window and enter the date.

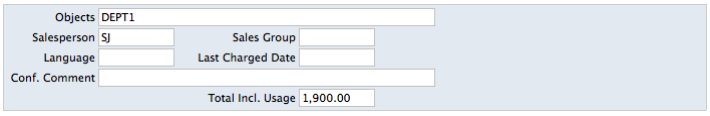
Customer: Here you will be able to specify the Customer/Guest Code that will be then used for invoicing the charges for the Reservation.

Name: Enter the name of the persons from the Customer's Company that would be using the resource.

Price List: If the customer has a Price List specified, then it will be pasted in this field when the Customer Code is entered in the Customer field.

Objects Card

In this section you will find the information related to the Sales process. E.g the Salesman, Sales Group, Objects and Total values.



Objects: The Objects from the Customer you specified on the record.

You can add different Objects into this field, those will be included in the Invoice created from the Reservation.

Salesman: By default it will be the initials of the Person creating the Reservation.

Sales Group: By default it will be the Sales Group specified on the Person who created the Reservation. You can change it by pressing Ctrl+Enter and making a new selection.

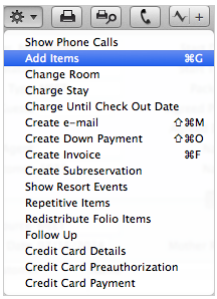
Language: If you wish to use a specific Form for some Reservations you can specify the language pointing to a specific Form on this field.

Last Charged Date: If you have defined specific Documents for the Reservation Status (in the Reservation Status setting) this field would be updated every time the Resource changes its status.

Conf. Comment: If you need or want to place an additional comment for the Reservation confirmation you can use this field.

Operations Menu

There are several tasks you can do from the Operations menu, click on the Operations button on the top of the register to open the list.



Show Phone Calls: When configured with the telephony system this operation will list the phone calls associated with the reservation.

Add Item: Allows you to add items to the reservation. e.g. Additional purchases, meals etc.

Change Room: This function will allow you change the assigned room to another one.

Charge Stay: This function will calculate the charge amount dependent upon what has ben set in the Resource Type setting. If the setting is to Charge as Manual or At Start, then by choosing it you will create a transaction for the day multiplied by the price per day.

These charges will be always for the Customer (The Customer is the Contact inside HansaWorld with the Customer Checkbox selected, this could be the company, while the Guest could be the employee from that company who is using the Resource at that time).

Charge Until Check Out Date: This function will allow you charge until the check out date

Create Email: This function will allow you to create an email to send to the contact person.

Create Downpayment: This function will create a down-payment invoice.

Create Invoice: The function will create the Invoices according to the configuration you have previously specified in the Hotel Settings. The Invoice will depend on the place inside the Reservation where the cursor was located. If the cursor is not on the customer, guest or agent, but on the Reservation Number, then an Invoice window will be opened and you will be able to specify to whom do you want to invoice.

Create Sub-reservations: This function will create a sub-reservation for your current reservation.

Show Resort Events: This will show Resort Events associated with this reservation.

Repetitive Items: This will show a list of items that are repetitive.

Redistribute Folio Items: Function that allows you to redistribute the folio items for this reservation accordingly.

Follow Up: Function that allows you to schedule a follow up activity.

Credit Card Details: Function that allows you to review the credit card details associated with this reservation.

Credit Card Preauthorization: Function that allows you to preauthorize a credit card associated with this reservation.

Credit Card Payment: Function that allows you to process for payment, a credit card associated with this reservation.

Resource Register

The Resource register is where you describe all of your Resources.

Header

Code: Enter a unique Code for identifying the Resource. The code has a maximum of 10 characters.

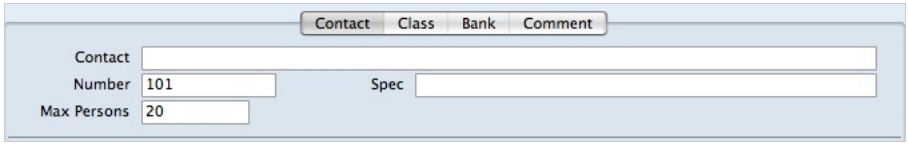
Name: The description for the Resource.

Status: This field will show the status of the resource. For example in relation to a hotel reservation whether the room is clean or dirty. HansaWorld will change the resource status to dirty when the guests checkout and also after running the Nightly Maintenance Routine.

Type In this field you specify the Type of the Resource.

Closed Checkbox: Mark this checkbox for preventing any further use of the Resource.

Contact Card



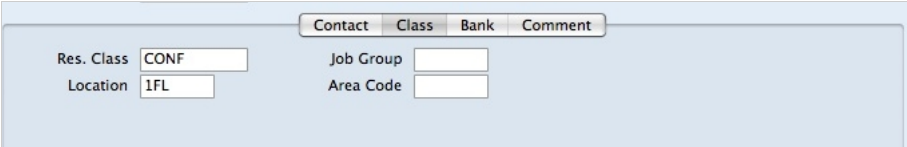
Contact: Using Paste Special you can specify a Contact person for this Resource.

Number: Use this field to specify an alternative Code for the Resource.

Max Persons: Here you can specify the maximum number of people that could make use of this Resource.

Spec: Record some additional information about the resource.

Class Card



Res. Class: Use paste special to enter the correct Resource Classification on this field.

Job Group: Use paste special to specify the Job Group (from Job Costing module) for this Resource.

Location: You can specify the Location of the Resource.

Area: You can specify a particular area for the Resource.

Bank Card

In this section you can specify the details related to the bank account to be used for this Resource.

Bank Name: Use Paste Special to select the Bank you will be using.

Bank A/C: Use this field to enter the Account Number. You will have to do it manually.

Std. Letter: It is also possible to have a standard text linked to the Resource. In order to do so, use Paste Special to select the Standard Text you want to use.

Operations menu

Resource History: This function will provide you with the history of the Resource. For example all the guests/customers who used the resource within the start and end dates.

Contacts

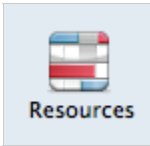
For more information about the Contact register please visit us at http://www.hansamanuals.com

Items

For more information about the Item register please visit us at http://www.hansamanuals.com

The Resource Planner

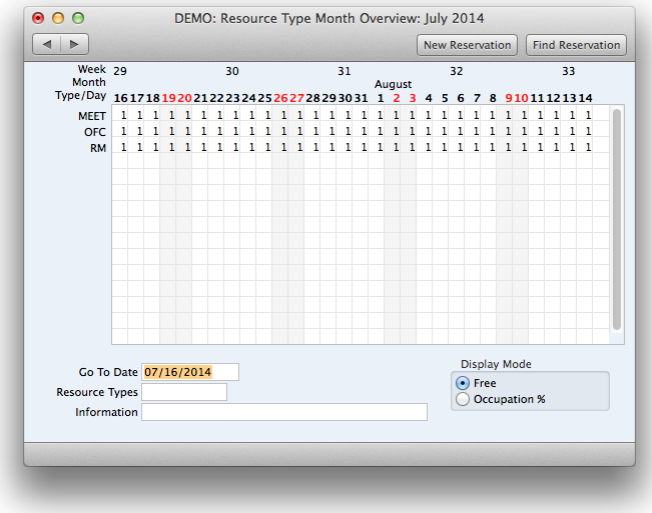
You can access the Resource Planner window by clicking on the Resource icon on the Company section of the Master Control of your HansaWorld application.



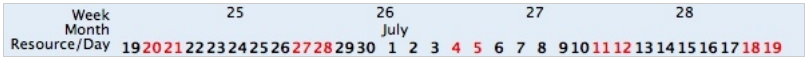
Depending on which settings you have activated you will be able to see Items Classifications, Project Numbers, Display Groups, Resource Types, etc.

Resource Type Month Overview

This is the window that will be displayed by default every time you click on the Resource icon from the Master Control. It offers an overview of information and, by using the filters and fields available, you can have quick access to specific data.



The Title of the register will always display the current month.



Week: The Weeks number for the Month Overview is displayed if you have set up the Weeks setting on the System module.

Month: The current month will be visible. By using the arrows on the left top corner of the register the month will consecutively change.

Type/Day: On the top of the grid you will find the days starting from the current date. In order to make it easier to read, the weekends are highlighted with red.

On the vertical axis you will see the Types of Resources. Depending on the setting configuration, the Resource Planner will display the different types available. For example: Resource Types, Display Groups, Project Numbers, Items Groups, etc.

Go To Date: By default the Date entered in this field will be the current date. Type a different date to have the Overview for that date.

Location: You can also filter the view by specifying a Location in this field.

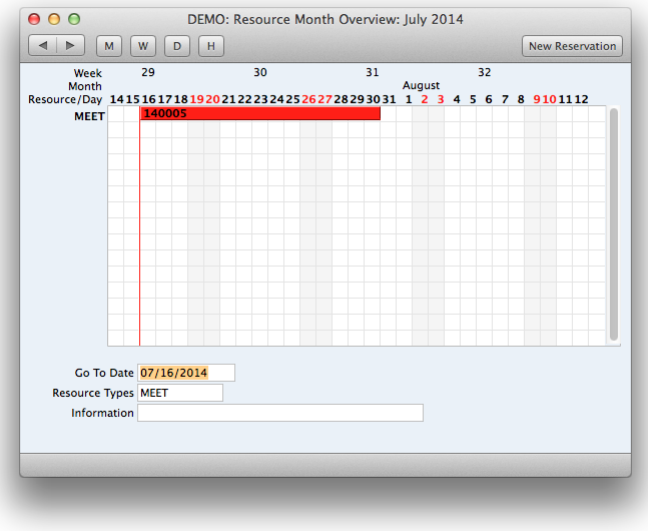
Resource Types: Use this field to select a Resource Type and filter the information by it.

Display Mode: You can choose between two Display Modes, Free (will show only the Free Resources) and Occupation % (will show the values as percentages) .

New Reservation Button: This button will create a New Reservation. The Start Date will be the first date displayed in the Month Overview.

Find Reservation Button: This button will open the Find Reservation window. You will be able to filter the information by using the following fields: Reservation, Resource, Guest, Customer, Status and Period. It is possible to specify if the period should consider the Start In Period or the End In Period.

Resource Month Overview

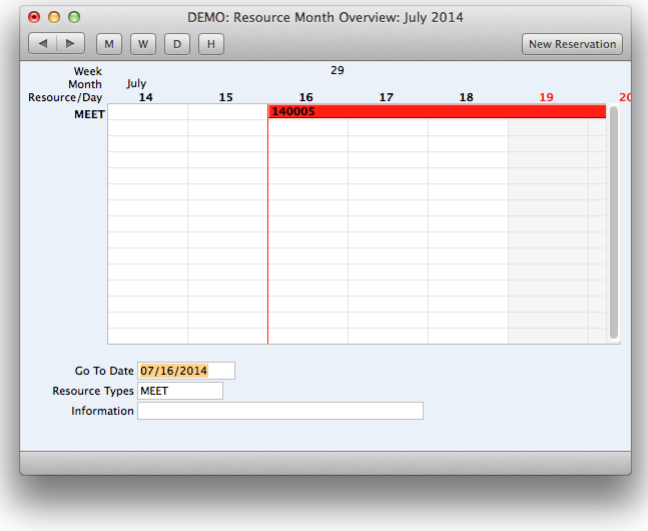


This window will be opened when you click on any of the Types from the Resource Type Month Overview window. There are some differences between both windows, which will be explained as it follows:

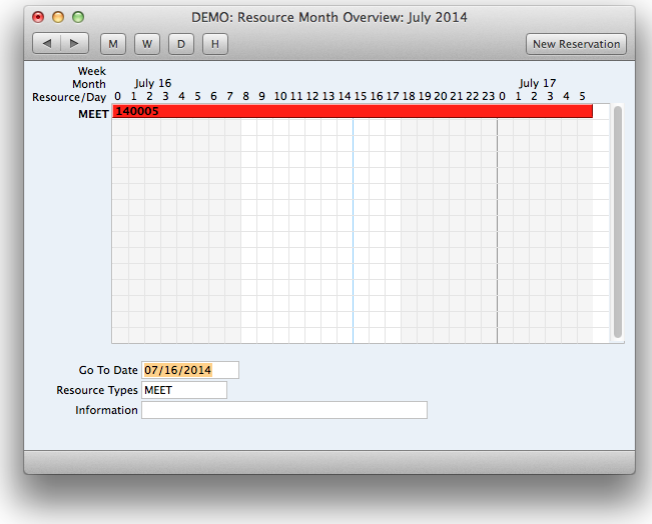
Buttons: In the window header you can see four buttons:

M – Month view of the Grid. The is the default view.

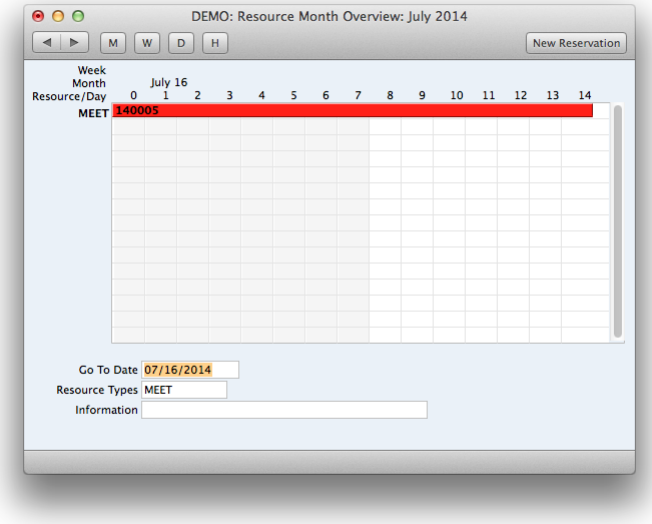
W – Weekly view of the Grid.



D – Daily view of the Grid.



H – Hourly view of the Grid.



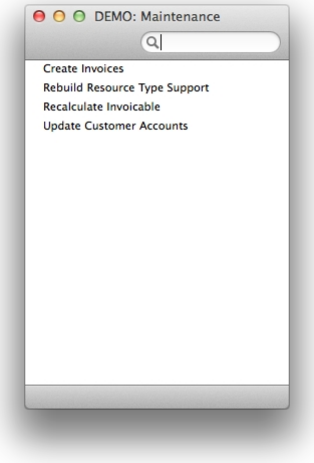
The Grid Matrix: The matrix will list all the resources/items that were included in the Resource Type. The colors visible in the matrix will depend of the Status of the Reservation of each resource.

Double clicking on the Resource number will open the Resource Inspect window.

You can drag and drop a reservation from one resource to another. Note that drag and drop is only supported on the vertical access: that is you can move the reservation up or down but not left to right. If you have the Hotel module activated, then in the week view you will be able to see a text on the screen for the reservation. This text is set in the Hotel settings.

MAINTENANCES

These Maintenance functions allow you to carry out certain updating tasks, usually involving batch processing.



Create Invoices

Use this routine when you want to create invoices by Period. The use of this maintenance is not recommended if you are using the Hotel module functionality.

Period: Enter the period you want to invoice. By default the system will enter the first period entered in the Reporting Period setting in the System module.

Customer: Use Ctrl+Enter to choose the Customer you want to invoice.

Recalculate Invoiceable

This routine will allow you to mark a Reservation as not invoiced.

Reserv. No.: Enter the reservation number you wish to run the maintenance for.

Update Customer Accounts

Use this routine for updating the Customer Account by changing the Status of the Resource.

Status: Ctrl+Enter to open the Paste Special window and select the desired Status.

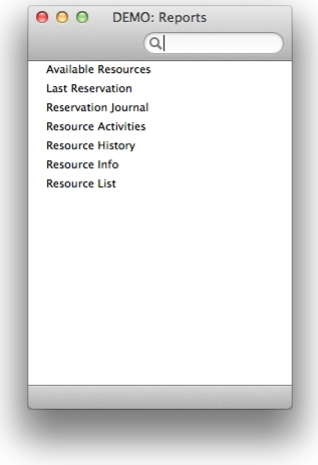
Resource: You can enter a specific resource in this field.

Date: By default it would be the current date, but you can change it.

Time: By default it would be the time from your computer when the window was opened. You should change it according to your needs.

REPORTS

As with all the modules in HansaWorld, to print a report in the Resource Planning module you will have to select the Reports icon on the Master Control Panel or use the Ctrl-R or Command-R keyboard shortcuts.



The Resource Planner module has the following reports:

Available Resources: Use this report to find the available resources. The report specifications include Start and End Date and Time and Resource Type.

Last Reservation: Use this report to find information regarding the last reservation for a particular resource. Information view can be Detailed or as an Overview.

Reservation Journal: Use this report to obtain a Journal of the Reservations. Keep in mind that this is the same report from the Hotel module therefore there will be some fields that you might not be able to use if you do not have this module active.

Resource Activities: This report will display all the activities related to a specific Resource.

Resource History: Use this report to list the detailed history of a Resource.

Resource Info: The Resource Info report will display all the related information related to the Resource.

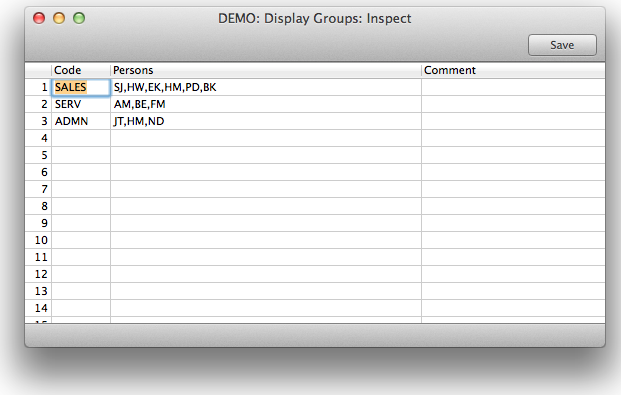
Resource List: Use this report to have a list of all the Resources. This report can be filtered by Status, Type and Classification.

CRM AND RESOURCE PLANNING

This section will give you an overview of how to use CRM and the Resource Planner together. The Resource planner view for activities could be useful when you would like to plan some activities that need a certain group of people to attend. For example you would like to plan a meeting where all sales people should attend. Using Resource Planner gives you the opportunity to check the calendars of all people belonging to the sales group at one time.

In order to be able to display the Activities in the Resource Planner you will need to complete the following settings.

Resource Planning>>Settings>>Display Groups



This setting allows you to divide the employees into groups that can later be viewed in the resource planner. Each Display Group will be presented on the matrix as a Resource Type. For example:

Code: Specify a unique Code for each Display Group.

Person: Paste Special, to the Person register. The initials of each Person should be separated by commas.

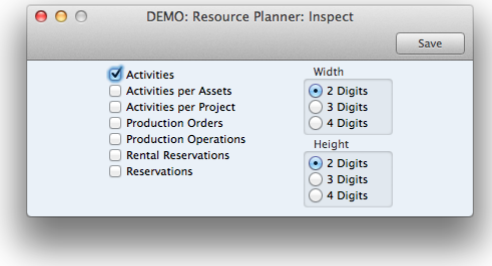
If you need to use Paste Special to enter several sets of initials, type the comma before opening the 'Paste Special' list.

NB! One person can belong to more than one Display group and you can set up the Display Group according to different parameters, for example: Departments of the Company, Classification of the Sales Person, etc.

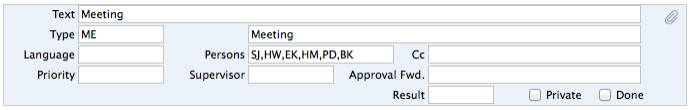
Resource Planning>>Settings>>Resource Planner

This is the setting where you decide what will be displayed on your Resource Planner grid. You can have several of the checkboxes ticked on but keep in mind that the information from several modules will be displayed at the same time if you do that.

Activate the checkbox for Activities.

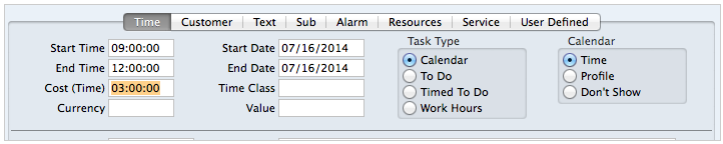


How to enter the Activity Record

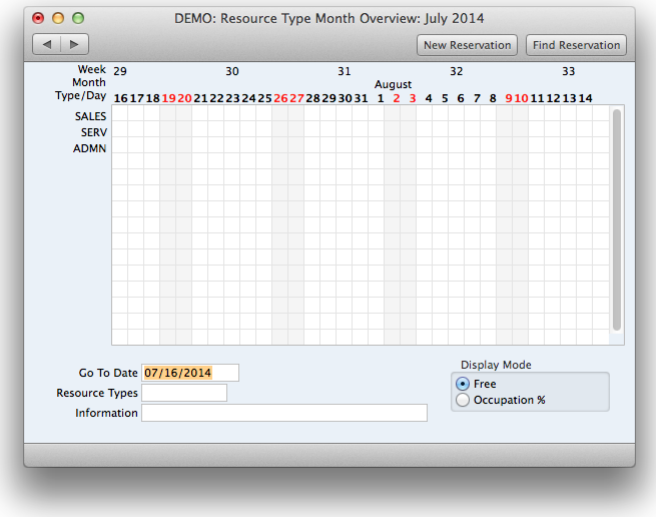


Create a new Activity. Enter the Text, Activity Type and in the Persons field enter one of the Users you have set up in the Display Group. You can also enter on the Persons field the Display Group code, which will enter all the persons belonging to that Display Group on the field.

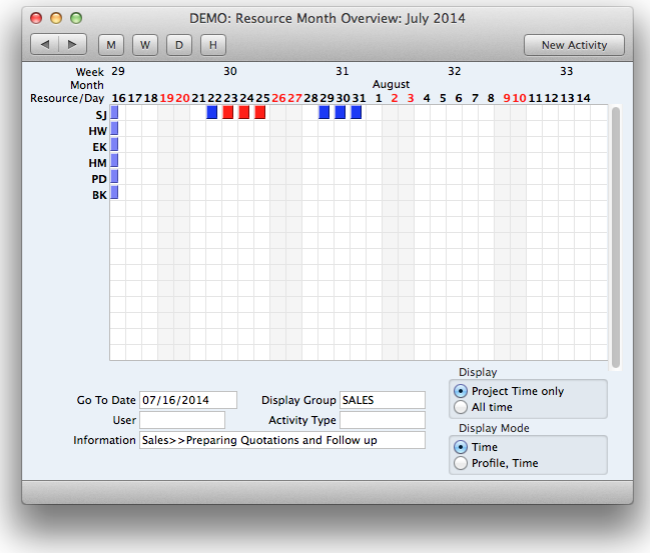
- Define a Start and an End Time for your Activity. The Task Type should be Calendar and the Calendar Type can be Time or Profile.



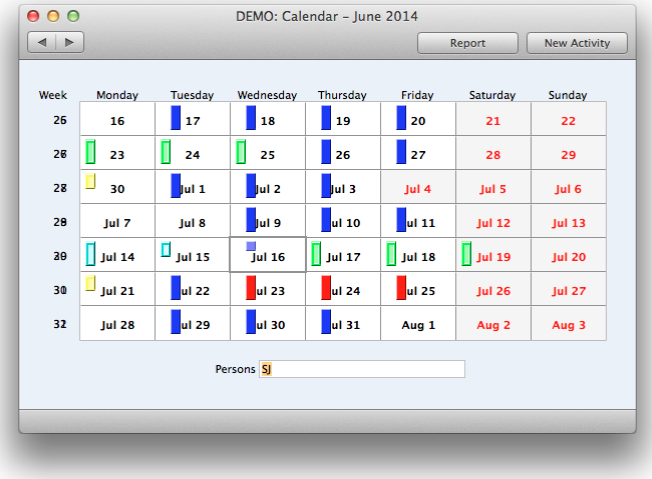
- Remember to Save your Activity.
- Now go to the Master Control Panel and click on the Resource Icon.



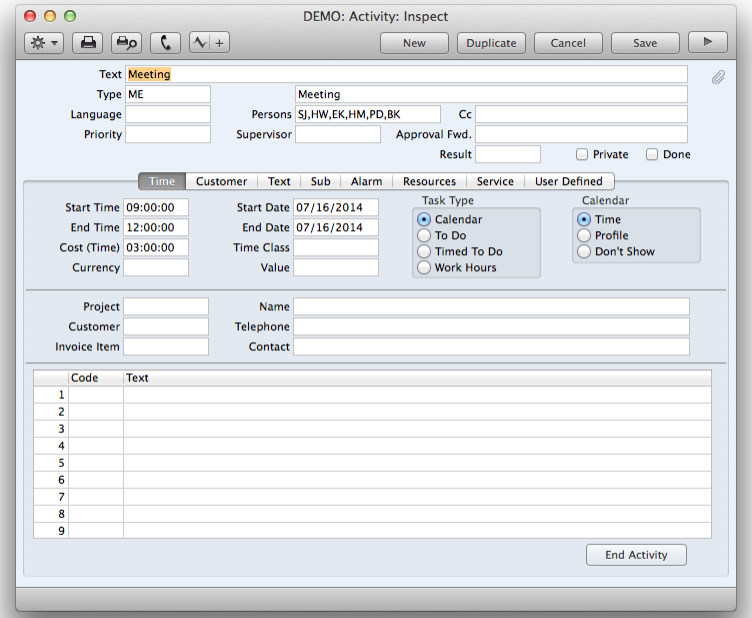
- In the Resource Type Month Overview window you can see all the Display Groups you have entered as the Resources Types. Double-click on the Display Group of the user for whom you have created the Activity.
- The Resource Month Overview window will be opened, here you can see the Activity you have just created under the date and in a specific color. Activities' colors are defined by the Activity Classes.
- For more information about the CRM module please visit http://www.hansamanuals.com



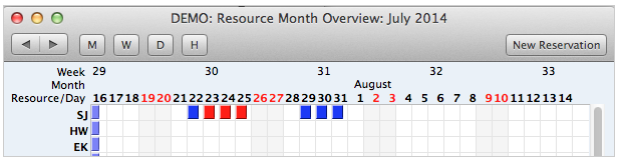
- Remember if you would like to see Activities with Calendar Type “Profile” you need to remember to change the Display Mode to Profile, Time on the Month Overview widow.
- You can change the month view by using the buttons for 'Next' and 'Previous' on the top left corner of the window.

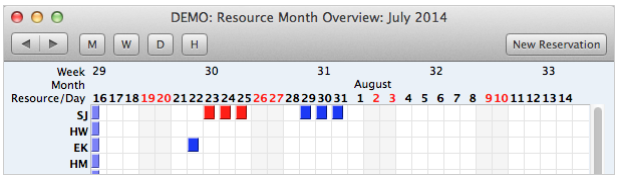


- To open the calendar of the Person, double click on that person's initials.
- To open the Activity record, double click on the colored bar.



- To change the activity for another user, click on the colored bar and drag it upward or downward onto the next user. Remember you can only move the activities vertically.



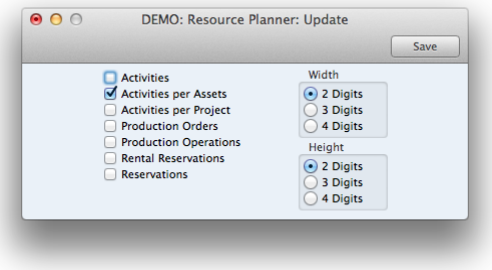


ASSETS AND RESOURCE PLANNING

This section will give you an overview of how to use Assets and Resource Planner together. Resource planner and assets could be useful when your employees share the use of an asset like a projector or a company car.

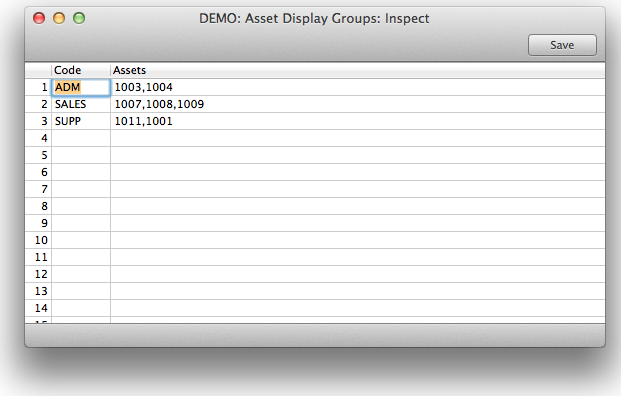
In order to be able to display the Activities per Asset in the Resource Planner you will need to complete the following settings.

Resource Planning>>Settings>>Resource Planner



In order to activate the integration between the Asset module and the Resource Planning you only need to tick the 'Activities per Asset' checkbox in this setting.

Assets>>Settings>>Asset Display Groups



This setting works in a similar way to the Display Groups setting, however here you will set up a Code for a group of Assets.

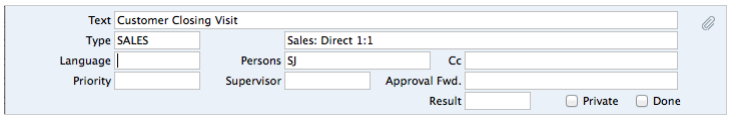
Code: Specify a unique Code for each Asset Display Group.

Asset: Paste Special, to the Paste Asset window. The Asset numbers will be entered here.

If you need to use 'Paste Special' to enter several sets of assets, type the comma before opening the 'Paste Special' list.

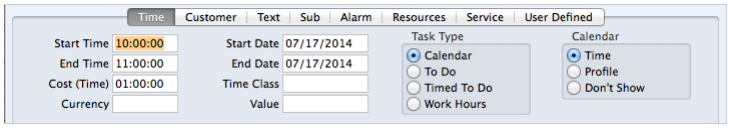
How to enter the Activity Record

- Create a new Activity, enter the Text, Activity Type and a Person.

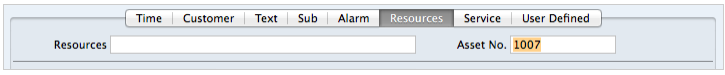


- Define a Start and End Date as well as Start and End Time. Mark the Activity with a 'Calendar' Task Type and set the

Calendar option as Time or Profile.

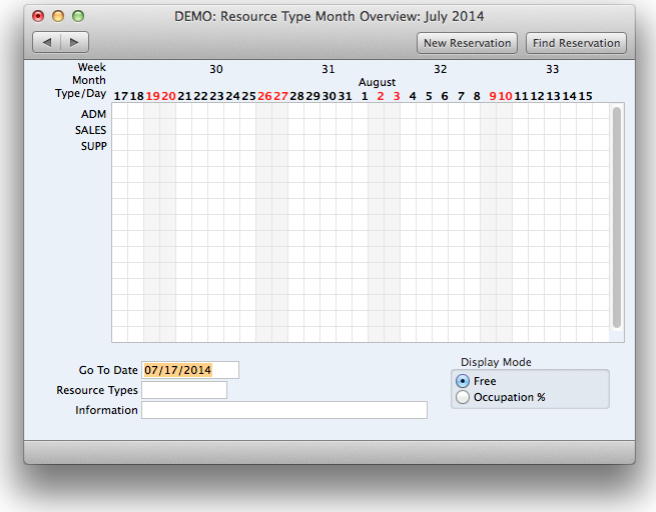


- Go to the Resources tile and in the Asset field enter an asset. This asset should have been set up in the Asset Display Groups. You can use the Paste Special function.

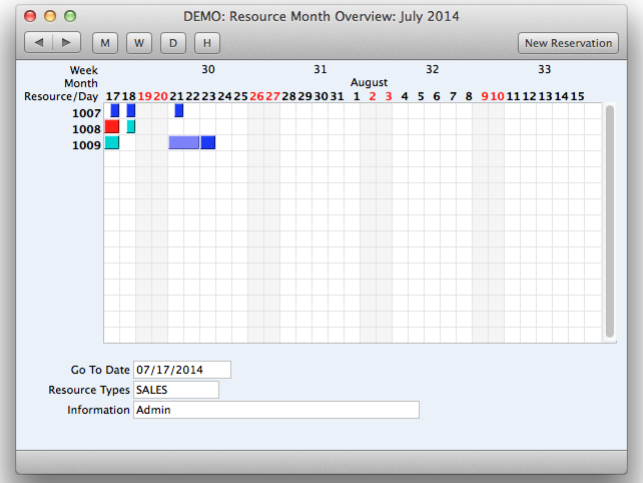


- Save your Activity.

- Now, open the Resource Planner window by clicking on the Resources icon of the Control Panel.
- On the Resource Type Month Overview you can see the Asset Display groups you have set before.

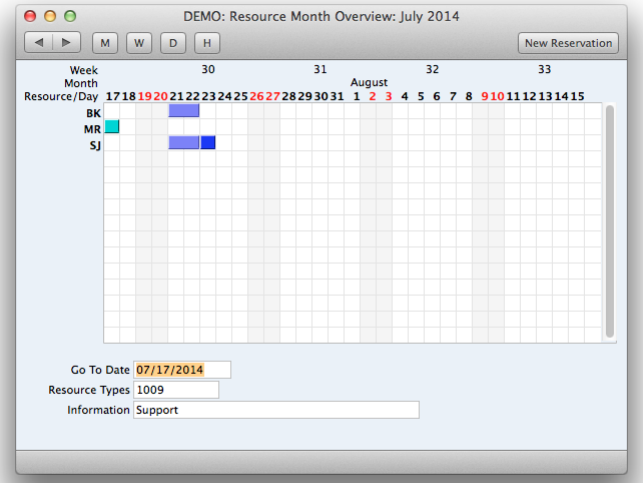


- Click on one of the Types to open the Resource Month Overview. Here you can see the Asset Numbers assigned to that Display Group.

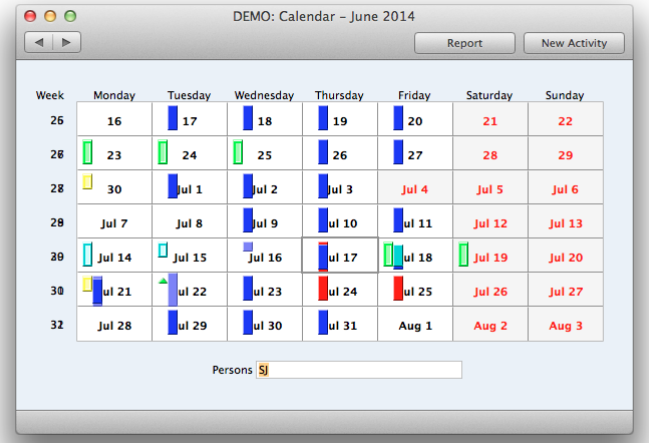


If an activity has been created specifying an asset, then you will see the color bar on a date.

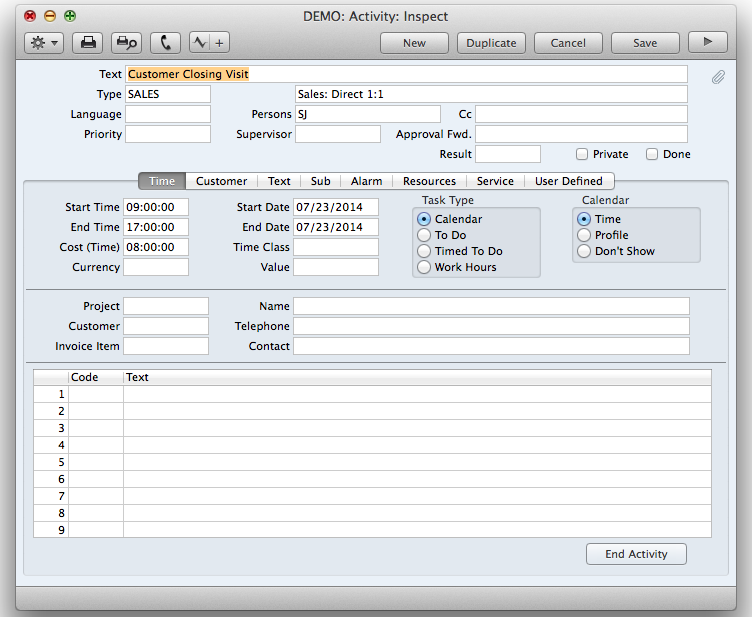
- Double-clicking on the Asset number will open a new window displaying the Persons from the different Activities with that Asset specified.



- Double-clicking on the Person's initials will open the Personal Calendar for that user.



- Double-clicking on the colored bar will open the Activity.



- As it was previously explained, the buttons 'Previous' and 'Next' months as well as the View options work in the same way.

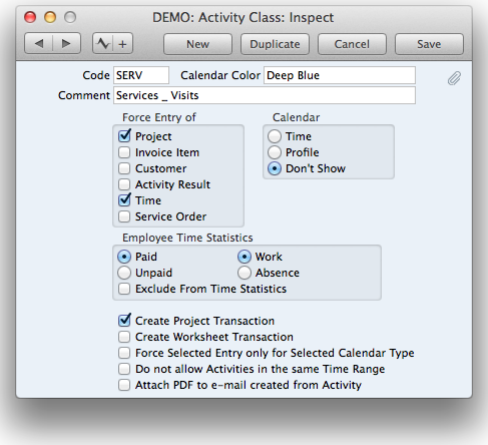
JOB COSTING AND RESOURCE PLANNING

This section will give you an overview of how to use Job Costing and Resource Planner together. Resource planner view for project related activities could be useful for planning the activities for a project.

In order to be able to display the Activities per Project in the Resource Planner you will need to complete the following settings.

CRM>>Settings>>Activity Class

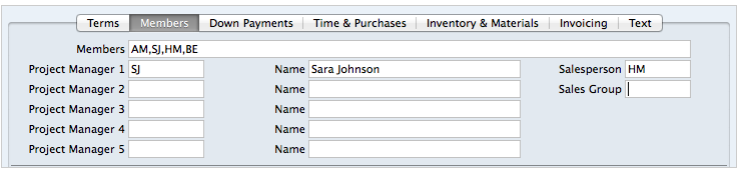
It is recommended that when setting the Activity Class for the Activity Types that you will be using for Job Costing, you activate the “Force Entry of Project” checkbox. By doing this you reduce the risk of errors while entering the activities.



It is also recommended to select the “Create Project Transactions” checkbox.

Job Costing>>Registers>>Project

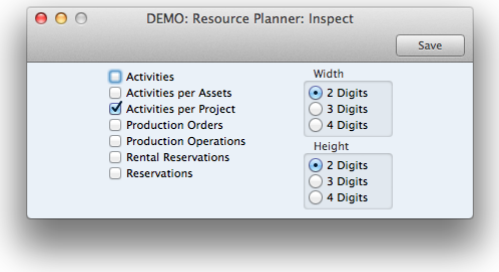
On the Members tab, define which users should be included as the Project members. You can use Paste Special to ensure that you are entering the correct user signatures.



The Resource Planner will display only the Activities for the Persons you have entered in this field.

Resource Planning>>Settings>>Resource Planner

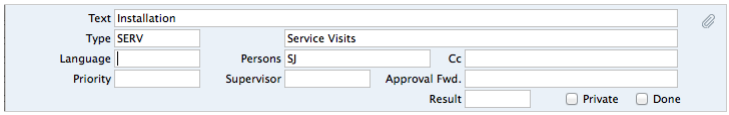
In order to activate the integration between the Job Costing module and the Resource Planning you only need to tick the 'Activities per Project' checkbox in this setting.



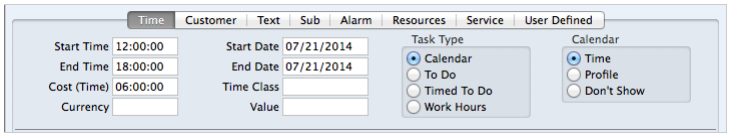
How to enter the Activity Record

You will only need to follow these steps while entering the Activity to have your Activities per Project displayed on the Resource Planner.

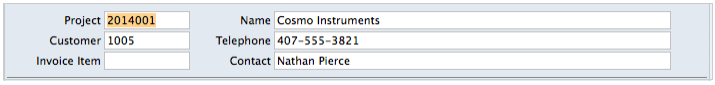
- Create a new Activity, enter the Text, Activity Type and a Person.



- Define a Start and End Date as well as Start and End Time. Mark the Activity with a 'Calendar' Task Type and set the Calendar option as Time or Profile. Remember to change the Display Mode to Profile Time if you do set the Calendar as Profile

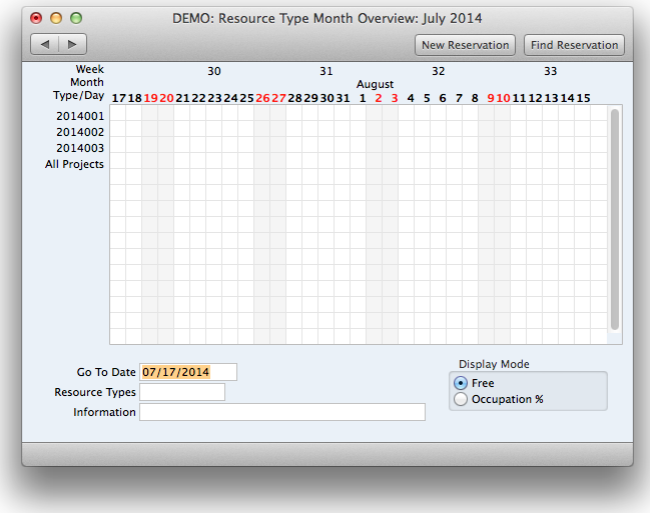


- Go to the Customer tile and in the Project field enter the Project number. You can use the Paste Special function. Once you have chosen the Project all the information relevant to the Customer will be entered automatically.

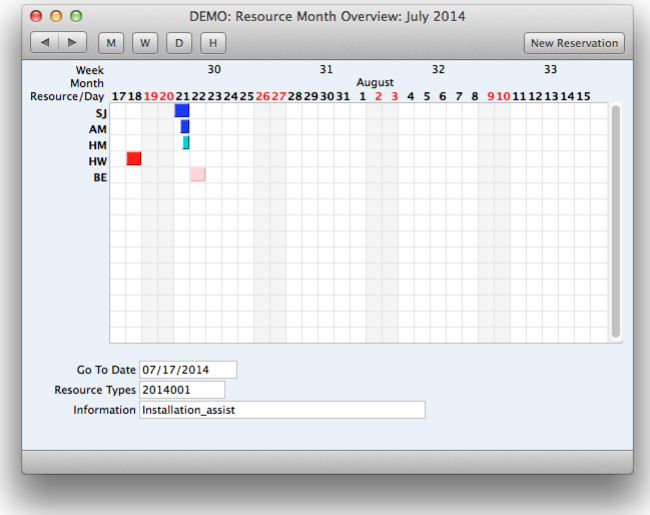


- Save your Activity.
- Now, open the Resource Planner window by clicking on the Resources icon of the Control Panel.

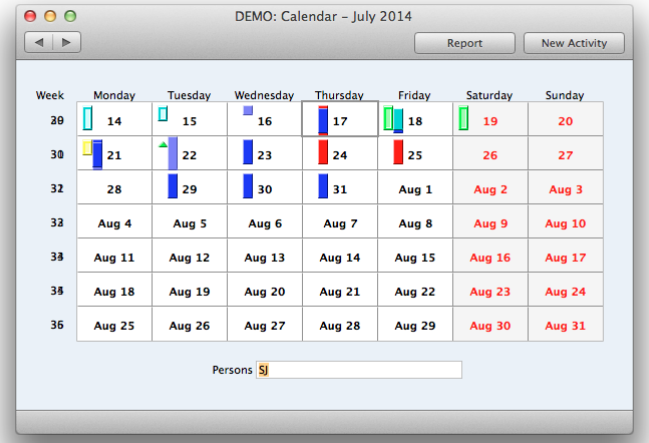
- On the Resource Type Month Overview you can see the Project Numbers displayed as the Resources Types.



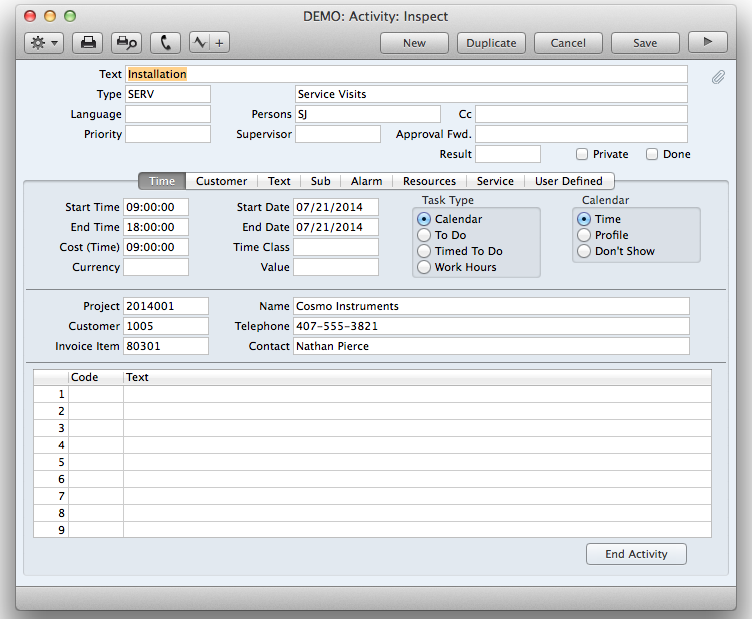
- Click on a Project Number to open the Resource Month Overview. Here you can see all the persons you entered on the Project Register. The ones whom had already entered an activity specifying the Project will have the Activity colored Bar.



- Double-clicking on the Person's initials will open the Personal Calendar of that user.



- Double-clicking on the colored bar will open the Activity.



PRODUCTION AND RESOURCE PLANNING

The Resource Planner Grid can also be used to display the machines' use and schedule. Production Orders and Production Operations are the two options you have for displaying the information from the Production module. In order to do so you will need to complete the following settings.

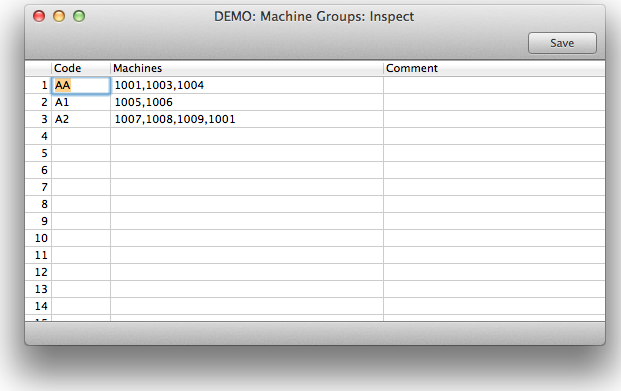
For detailed information about the Production module and integration please contact your local HansaWorld office.

Production>>Settings>>Machine Groups

This setting allows you to divide the machines of your company into groups. These groups can represent the different recipes that the machines can produce. Dividing machines and employees into display groups will help with the resource planning and with classifying the activities in the CRM module.

Production Orders will be shown in the Resource Planning first by group and then by machine.

Each machine must be set up as its own record in the asset register (Asset module) before you can enter it into the Machine Groups setting.



Code: Specify a unique Code for each Machine Display Group. You can use five alphanumeric characters for the code. Your code should not be the same as the machine code (the asset code) or the user signature.

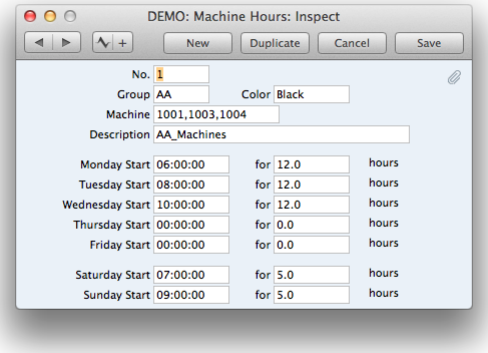
Machines: Use Paste Special, to enter the machines you want to specify for each Machine Display Group, always separated by commas.

A particular machine can belong to more than one Machine Display Group. Be careful if you have different working times per Machine Group.

Production>>Registers>>Machine Hours

This register is used to determine the queue positions of the availability of the machine groups. The record provides fields to capture the days of the week and hours per day that is applicable to this machine group.

Group: Use Ctrl+Enter to specify the Machine Display Group that will have the hours set up. You need to have already



Color: Choose the color of your preference to define the Machine Hours for this Machine Display Group. In the resource planner this color will represent the period that machines belonging to this group are not available for any work.

Description: Enter a description for the machine's schedule.

Days Start and for hours: There are two fields for each day of the week. On the first field you have to define the start hour and in the second filed the amount of hours that this machine will keep working.

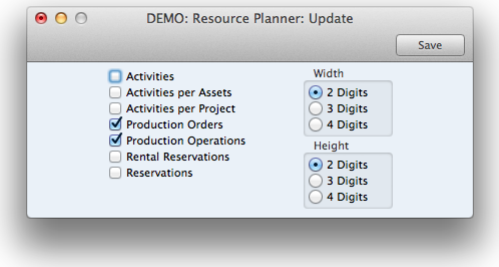
If you want the machine group to be available 8 hours from Monday to Thursday and 7 hours on Friday you need to enter a start at 08:00 for 8 hours and on Friday you set a start at 08:00 but for only 7 hours. If the machines belonging to this group should not be available, as in our example, Tuesday and Thursday, then you have to set zero.

Resource Planning>>Settings>>Resource Planner

In order to activate the integration between the Production module and the Resource Planning you only need to tick one of these two options:

- Production Orders

- Production Operations

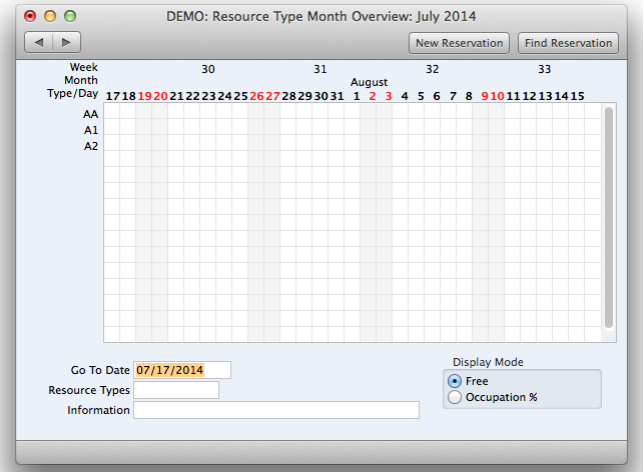


The Production Orders option

If you have selected just the checkbox “Production Orders” and set up the previous setting, then you will be able see the machines' schedule.

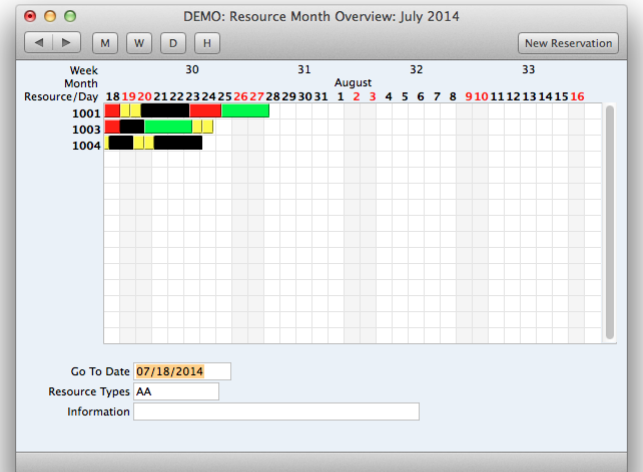
To make this happen, you only need to open the Resource Planner window by clicking on the Resources icon of the Control Panel.

- On the Resource Type Month Overview you can see the Machine Display Groups you just have entered as the Resource Types for this option.



- Click on a Machine Group code to open the Resource Month Overview. Here you can see the machines included on the Machine Display Groups setting as the Resource.

There are colored bars for each machine, indicating the period of time per day that those machines will not be working or occupied, in the picture below at yellow. The blank spaces means the machines are available but not busy with any Production Order.



Production Orders with accepted or started status will be shown in the resource planner. The color displayed for Production Orders is the one set in the recipe. For a better view, we suggest to use different colors in the recipe. (The default color is black).

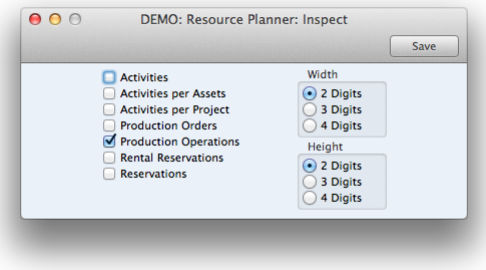
To display the Production Orders HansaWorld will check the information in each Production Order record: Machine, Queue Position and Planned Time.

For example: today is Monday. A Production Order that takes 15 hours to produce is number 1 in the queue. This Production Order will appear in the resource planner 1 day (Monday) + 3 hours (Wednesday). This assumes that the machine is not available on Tuesday.

When the total quantity from the Production Order is produced the machine, will be removed automatically from the Resource Planner.

Note that the user does not even need to change the status to Finished.

The Production Operations option



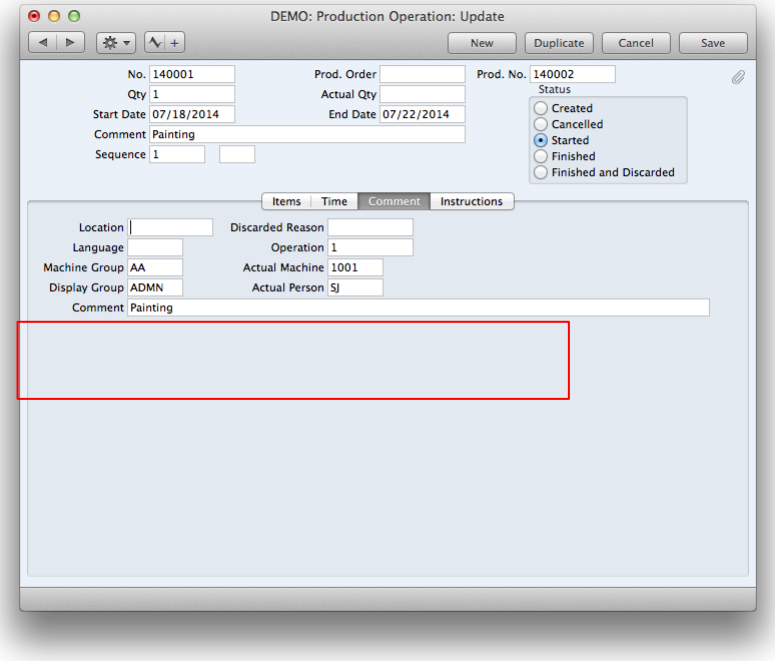
If you have selected the "Production Operations" checkbox from the Resource Planner setting, then in order to see the Production Operations you will need to follow these steps:

On the Production Operations record when the status is Created navigate to the Comments Tile. The following fields should be completed:

Actual Machine: Use Ctrl+Enter to specify the Machine that would be used for this Production Operation.

Display Group: Enter the Display Group of the Person who will be in charge of the Production Operation. It is not mandatory to display Production Operations in the Machine group view.

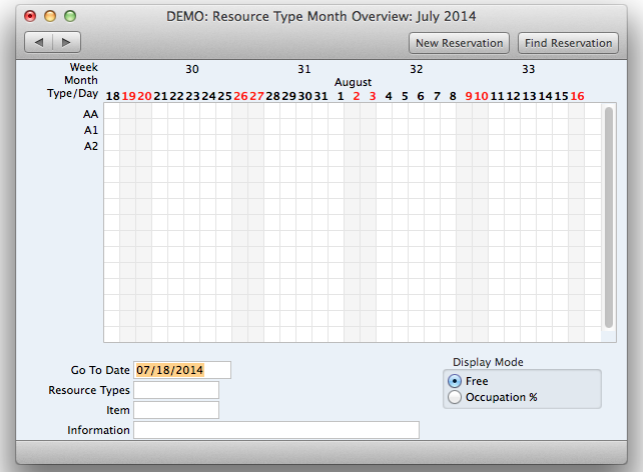
Actual Person: Specify the member of the Display Group in this field. It is not mandatory to display Production Operations in the Machine group view.



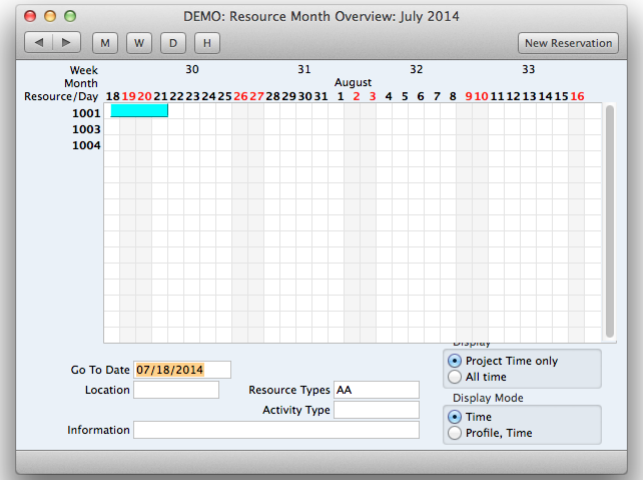
Save the record but do not change the status. Note that the Production Operation must stay in the Created status.

- Now, click on the Resources icon of the Control Panel to open the Resource Planning window.

- On the Resource Type Month Overview you can see the Machine Display Groups you just have entered as the Resource Types for this option.

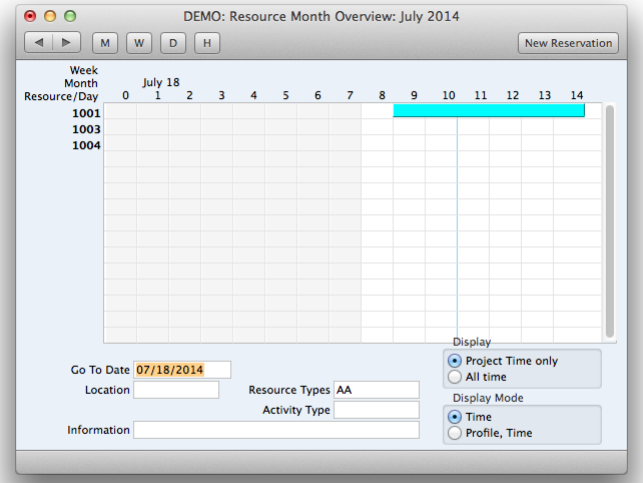


- Double-click on the Machine's Display Group code to open the Resource Month Overview. Now you can see the machines that are included in this group. If the machine was included on a Production Operation you will be able to visualize the period of time when this happened (start date from Production Operation)



- If necessary you can change the default monthly view, for example to hours, in order to see more clearly the period of time during which this machine will be in use.
- Double clicking on the colored bar will open the Production Operation record.

Only Production Operations in Created status will be shown. The times that Machine are not available for Production are not shown in the Resource Planner when using the Production Operations option.


DEMO: Resource Month Overview: July 2014
M
W
D
H
New Reservation
Week
Month
Resource/Day
July 18
0 1 2 3 4 5 6 7 8 9 10 11 12 13 14
1001
1003
1004
Display
Project Time only
All time
Go To Date
07/18/2014
Location
Resource Types
AA
Activity Type
Display Mode
Time
Profile, Time
Information

RENTAL AND RESOURCE PLANNING

Rental Reservations can be displayed in the Resource Planner grid, allowing the users to know at a glance the period of the reservation and the specific status of that reservation.

In contrast with the other modules that are integrated with the Resource Planning module, the Resource Month Overview is available from within the Rental Reservation record through the Operations function 'Rental Overview'.

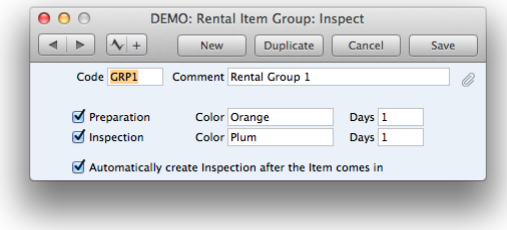
For detailed information about the Rental module, the functionality and integration with the rest of the HansaWorld ERP system please contact your local HansaWorld office.

The following description covers the main settings you will need in order to use the Resource Planning for displaying Rental Reservations.

Rental>>Settings>>Rental Item Groups

This register is used to specify the additional days required for preparing the rental before delivering it to the customer and for Inspecting it after it has been received from the Customer.

The Rental Item Groups has to be entered in the Rental Item record (available from the Rental and Internal Inventory modules) and has nothing to do with the Item Group of the Item.



Code: Enter a unique code of a maximum of 5 alphanumeric characters to identify your Rental Item Group.

Comment: Write down a short description for the Rental Item Group.

Preparation, Color and Days: Select the Preparation checkbox if it is required that the Rental Items belonging to this Group have a Preparation Period. This period of time could be used to get the item ready for the customer, in the case that some tuning or setting is needed.

In the 'Color' field, choose with Paste Special a specific color that will be displayed on the Resource Overview to indicate this period.

In the 'Days' field, enter the amount of days needed for the preparations.

The preparation period will take place before the start date of the Rental Reservation.

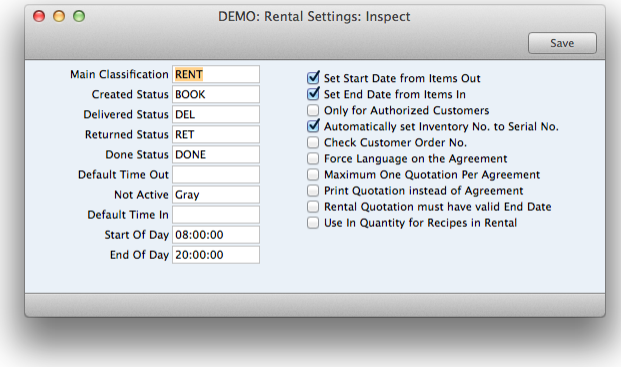
Inspection, color and Days: These fields work in the same way than the ones for the preparation

Automatically create Inspection after the Item comes in: If you activate this checkbox a Rental Item Inspection record will be created after you mark the Status as Accepted on the Item In record and save it.

Rental>>Settings>>Rental Settings

This setting allows you to define the defaults for Rental such as:

- The main Classification that should be used for the Rental Items.
- The Status Code to be used for the Rental Item when Created, Delivered, Returned and Done.
- The sequence and colors of each of these Statuses.
- The default start and end times for the day.



Main Classification: Specify the Main Item Classification you are using for the Items you will be using in the Rental module. Remember that this classification will not be displayed in the Resource Planning window. The function is to provide a parent node for the classification tree structure.

NB! The main Item Classification has to be specified in the Item Classification you entered in the Inventory Items records for the Items you will use for Rental.

Created Status: Ctrl+Enter to open the Paste Rental Reservation Status that should be used every time a Reservation is created.

When creating a Reservation from the Availability report, this will be the status by default entered in the Reservation record.

Delivered Status: Ctrl+Enter to open the Paste Rental Reservation Status that should be used every time you create the Items Out record from the Reservation or the Rental Agreement and mark its status as Sent.

The status will be updated automatically on the Reservation record and in the Resource Planning window the Reservation will change to the color defined for this status.

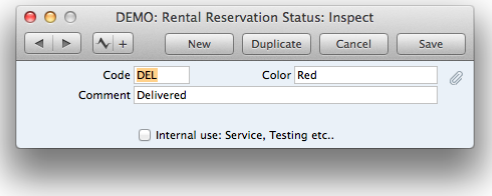
Returned Status: Ctrl+Enter to open the Paste Rental Reservation Status that should be used every time you create the Items In record from the Reservation or the Rental Agreement and mark its status as Accepted

The status will be updated automatically on the Reservation record and in the Resource Planning window the Reservation will change to the color defined for this status.

Start and End of Day: Use these fields to specify the duration of a Day. It will be useful when you are charging the rental reservation per days.

Rental>>Settings>>Rental Reservation Status

In this setting you will define the Status Codes and colors that then will be used in the Rental Settings setting to define the Reservation status sequence.



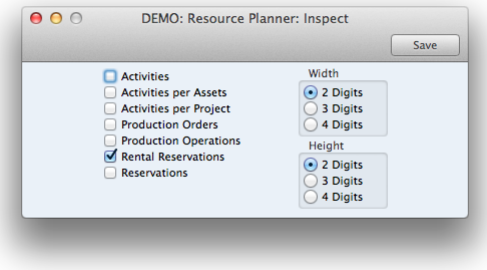
Code: Specify a unique Code for each Rental Reservation Status. You can use a five alphanumeric character for the code.

Color: Use Paste Special, to enter a color that will be used on the Resource Planner window to display the Rental Reservation Status.

Comment: Enter the description of the Rental Reservation Status.

Rental>>Settings>>Resource Planner

In order to display the Rental Reservations you need to activate the “Rental Reservations” checkbox in this setting.

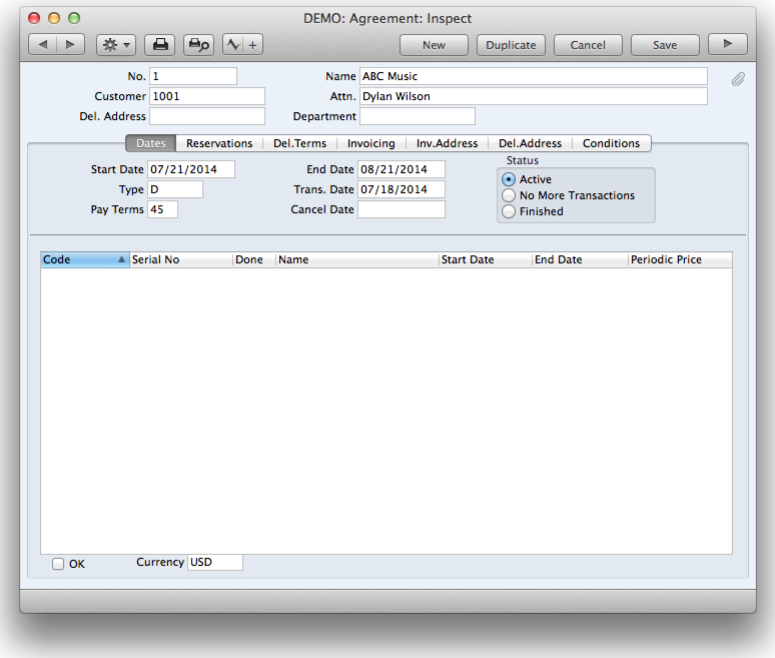


The Rental Process in the Resource Planner

If you have activated the checkbox “Rental Reservations” and set up the previous settings, then you will be able to see the Rental Reservation in the Resource Planner.

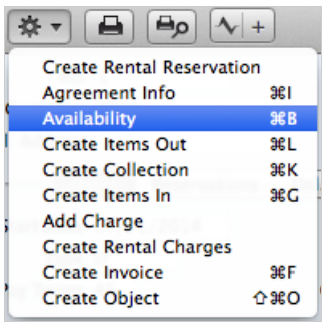
Follow this example to see the whole process:

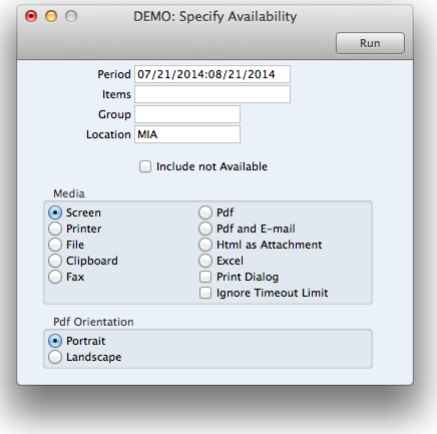
- Create an Agreement in the Rental module. Enter a Customer, A Start and End Date and a Type.



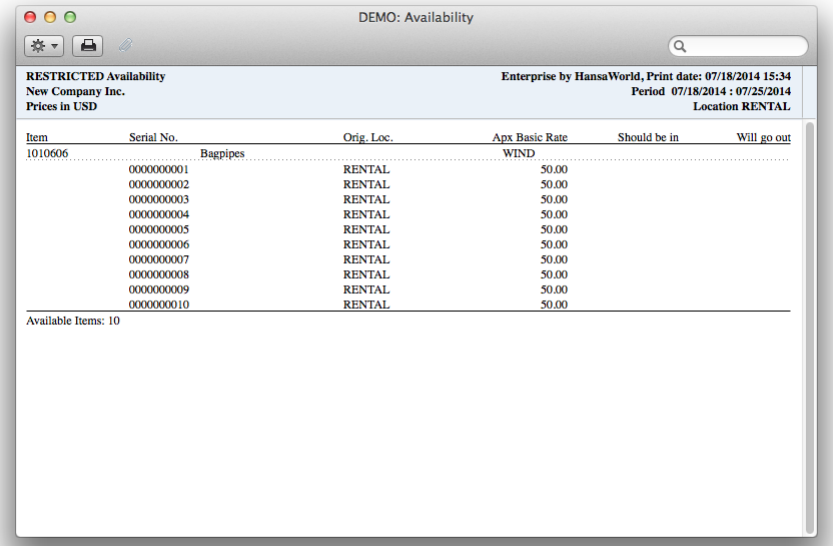
Once complete check the OK checkbox at the footer of the record.

- Go to the Operations menu and choose 'Availability'. The specification window of the Availability report will appear on screen with the Period you specified on your start and end date. Choose a location and run the report.

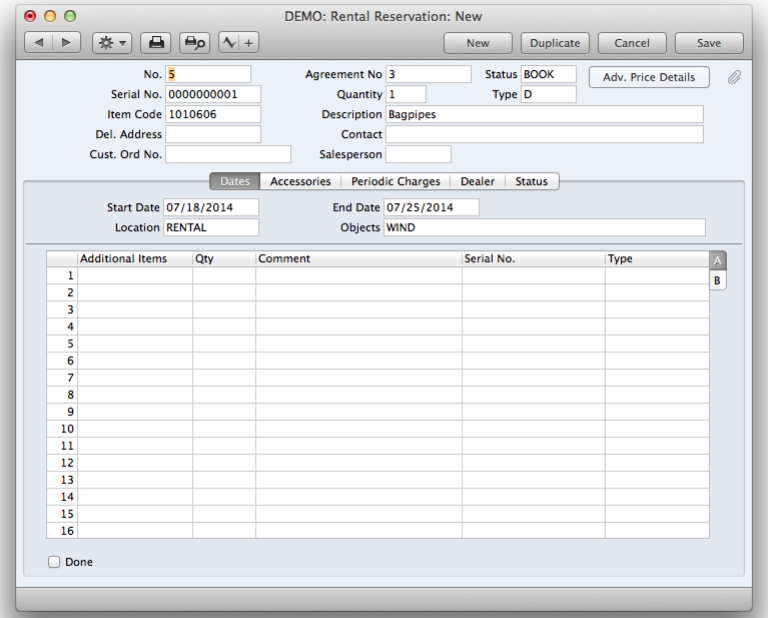




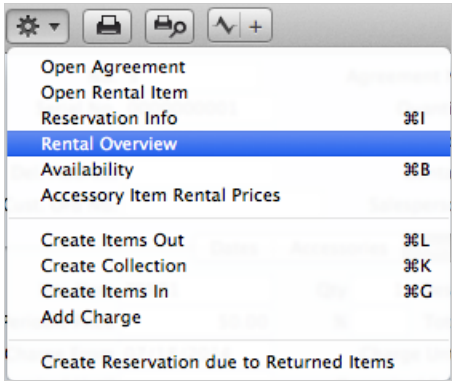
- In the report, choose the Item you want to rent for this customer. Using the drill down functionality select an item's Serial Number.



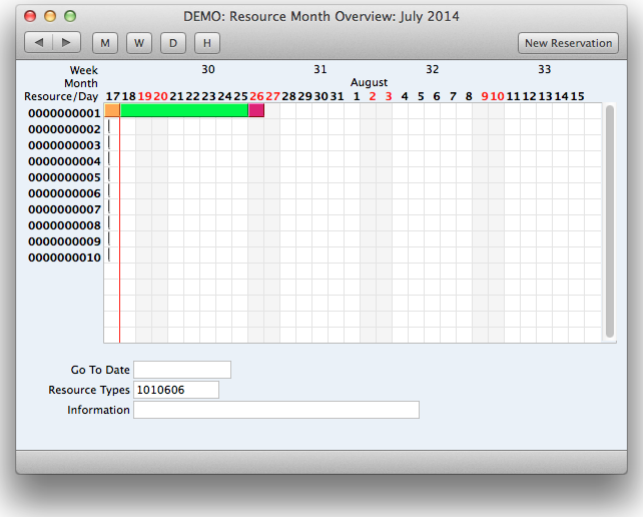
- The Reservation record will be created automatically



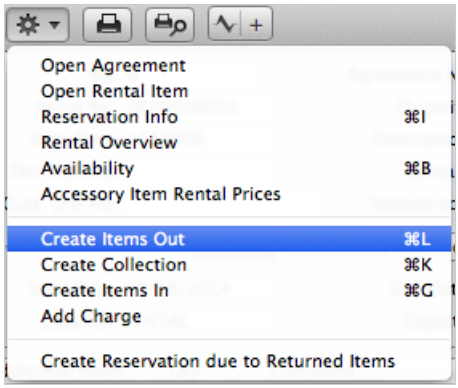
- Once you have completed the information regarding the Periodic Charges, go to the Operations menu and choose 'Rental Overview'



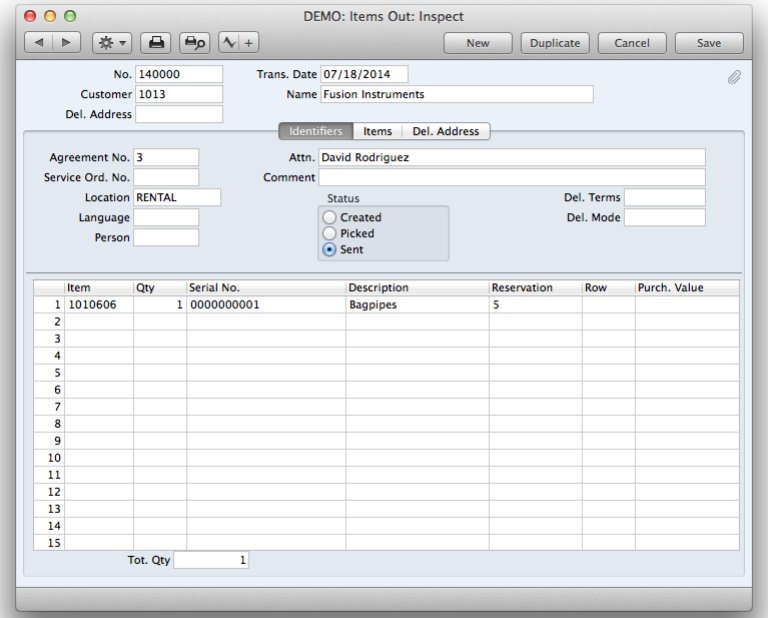
The Resource Month Overview window will be opened and here you can see the Reservation for your Serialized Rental Item. The Preparation and Inspection days are automatically included and the Status Reserved is shown in the specific color that was previously selected.

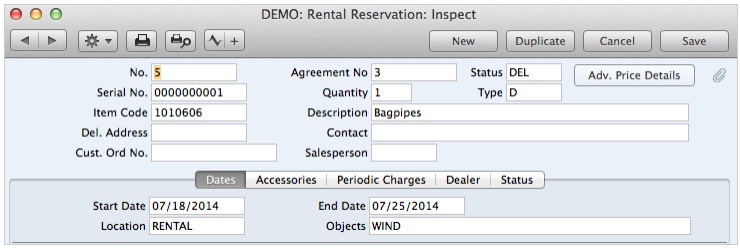


- Create the items Out record from the Rental Reservation by choosing this action from the Operations menu.

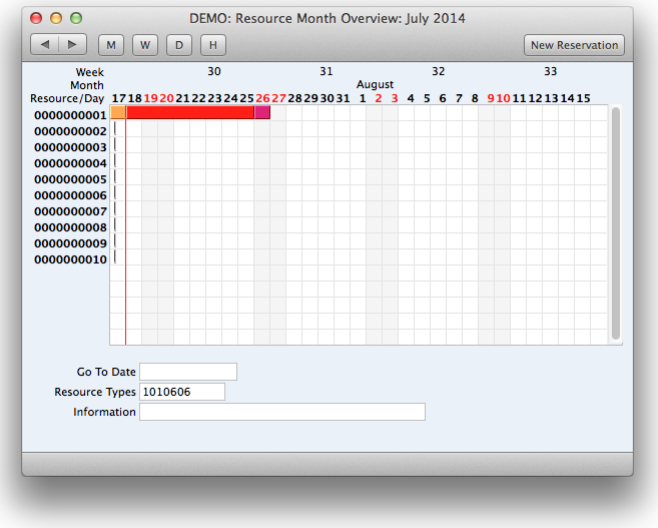


- On the Items Out record, mark the Status as Sent and save the Record.

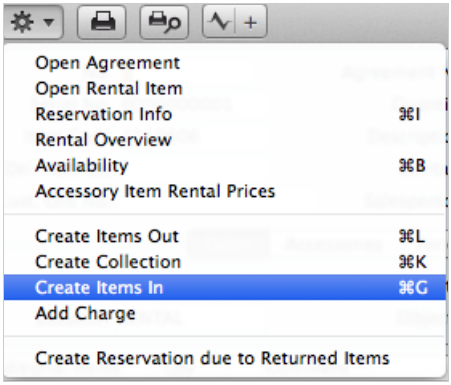




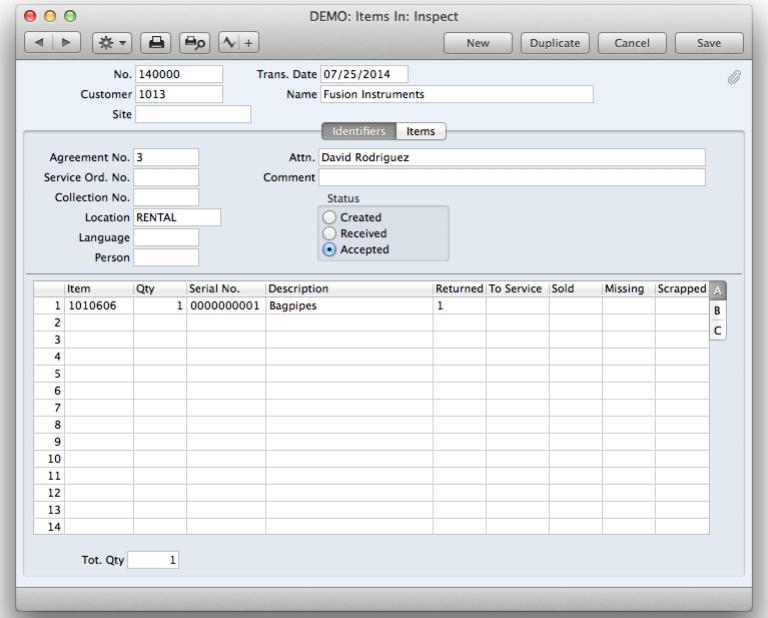
- Go back to the Rental Reservation, here you can see that the status on the record has changed to Delivered.
- Open the 'Rental Overview'. Now you will see that the color of the Reservation has changed.



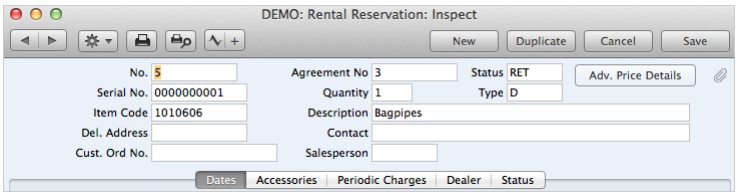
- From the Rental Reservation, now create the Item In record.



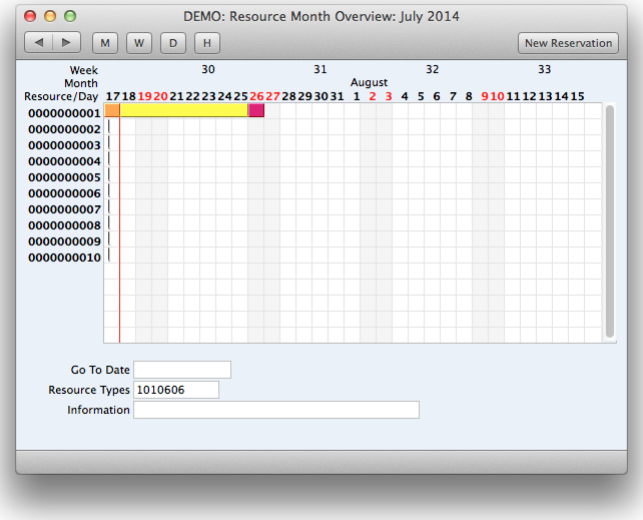
You will need to change the date of this record to the end date of your reservation, mark the status as Accepted and save the record.



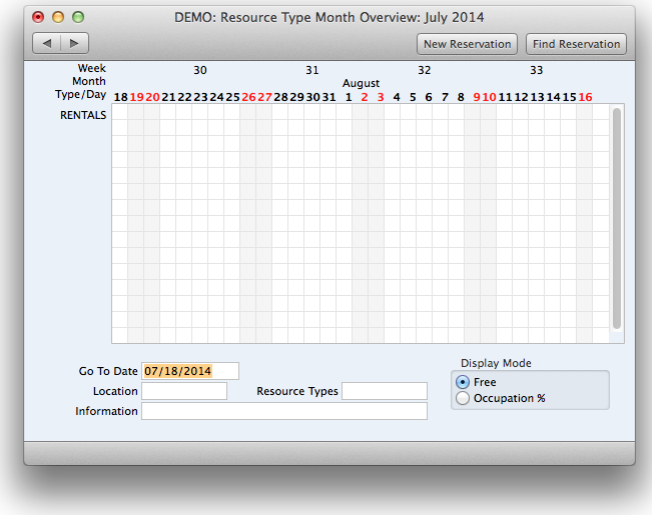
- Go back to your Rental Reservation, the Status field has changed once again and now it displays the 'Returned' status.



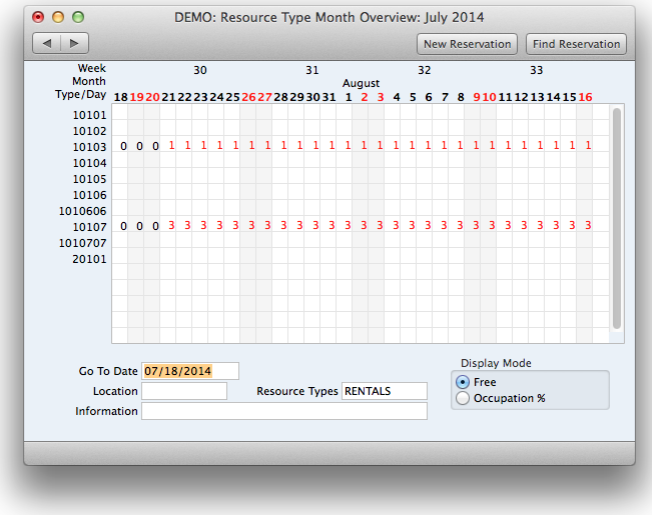
- Open the 'Rental Overview' and you will see that once again the Status of your Rental Reservation has changed the color to the one defined for the Returned Status.



- If you click on the Resources icon of the Control Panel. You will have access to the Resource Type Month Overview where the Item Classifications are displayed as the Resource Type.



- Double click on one of the Item Classifications, the Resource Type Month Overview will be opened. Here you will have listed all the Items' Codes which belong to that Item Classification.



- Double click on one of the Items to open all the Serial Number Items of the Rental Items. If there is a colored bar for the Rental Item it means that there is a reservation made for that period, depending on the color you will know the status of it.

HANSAWORLD

APPENDIX

Terminology between different versions of English language

The language used in this material is American English. There can be slight differences between other versions of the English language, which can lead to confusions. This table should help to clear these up. Sorted alphabetically

British	USA	Canada	Australia + New Zealand	Singapore
Cheque	Check	Cheque	Cheque	Cheque
Colour/coloured	Color/colored	Colour/coloured	Colour/coloured	Colour/coloured
Credit Note(CN)	Credit Memo (CN)	Credit Memo (CM)	Credit Note (CN)	Credit Note
Dialogue	Dialog			
Instalment	Installment			
Jewellery	Jewelry	Jewellery	Jewellery	Jewellery
Licence (noun)	License	Licence	Licence	Licence
Mileage Claim	Miles	Way Lists	Mileage Claim	Mileage Claim
Miles	Miles	KM	KM	KM
Mobile	Cell	Mobile	Mobile	Mobile
Nominal Ledger (NL)	General Ledger (GL)	General Ledger (GL)	General Ledger (GL)	General Ledger (GL)
Post Code	ZIP Code	Post Code	Post Code	Post Code
Profit and Loss Statement	Income Statement	Income Statement	Statement of Profit or Loss	Statement of Profit or Loss
Purchase Ledger	Payable (PL = AP)	Payable (PL = AP)	Purchase Ledger	Purchase Ledger
Sales Ledger	Receivable (SL=AR)	Receivable (SL=AR)	Sales Ledger	Sales Ledger
Salesman	Salesperson	Salesperson	Salesman	Salesperson
Stock	Inventory	Inventory	Stock	Inventory
Stocktake	Inventory Count	Inventory Count	Stocktake	Inventory Count
Stock Depreciation	Inventory Adjustment	Inventory Adjustment	Stock Depreciation	Inventory Adjustment
Supplier	Vendor	Vendor	Supplier	Vendor
Turnover	Revenue	Revenue	Revenue	Revenue
VAT	Sales Tax or Tax	Tax (or GST/PST)	GST	GST/SST/HST