



User Manual of GeoPal Activity Planner

UPDATED AS OF 03/06/2021

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1. Overview

The Activity Planner provides a new and more efficient way for planning, assigning and tracking work against users and allows companies to create configurable views of this data. This document will provide details on the new functionality available across the activity planner configuration and the activity planner itself.

1. Configuring the Activity Planner

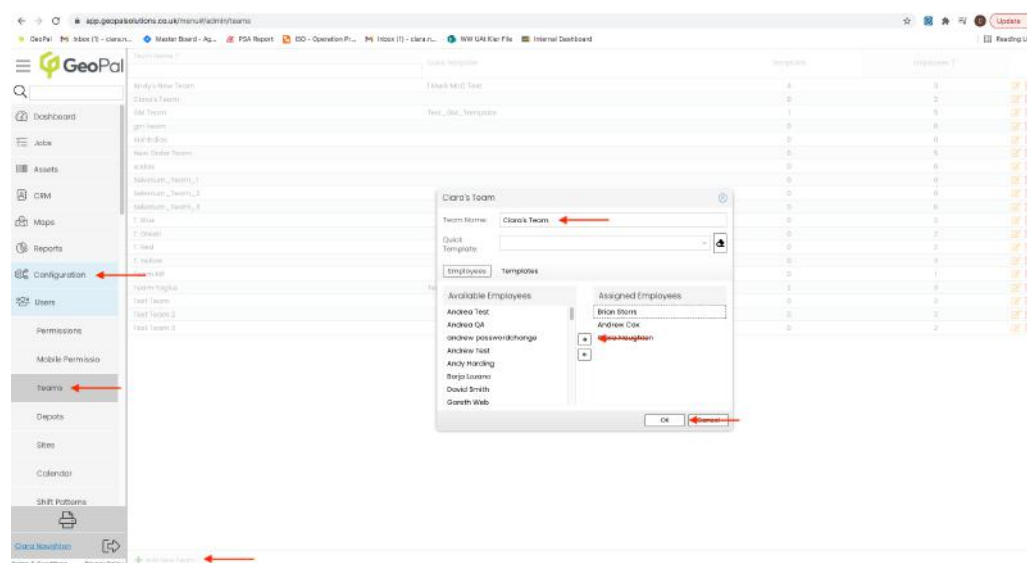
A number of functions need to be configured before the Activity Planner can be used. The Activity Planner is structured to group teams of users into separate depots which can make planning and assigning work more efficient. The activity planner can be also be configured to display shift patterns and holidays to indicate when users are available for work assignment.

The sub sections marked with * are mandatory when using the activity planner, the sub sections without * are optional.

1.1. Teams*

A 'Team' can be created using the following steps:

- Select 'Configuration'
- Under 'Users', select 'Teams'
- Select 'Add New Team'
- Complete the 'Team Name' field
- Highlight the users for this team from the 'Available Employees' panel and select the '>' button to assign them to this team
- Individual users can be assigned to multiple teams if required
- Select 'Save' once all users have been added



- app:geopaleo@ms.cruk.ac.uk:~/msu1/admin/teams

Master Board - App... PSA Report ISO - Operation P... Index (1) - data... N/W Link File Internal Dashboard

Ready List

GeoPal

Teams

Dashboard

Jobs

Assets

CRM

Maps

Reports

Configuration

Users

Permissions

Module Permissions

Teams

Depots

Sites

Calendar

Shift Patterns

Clear Navigation

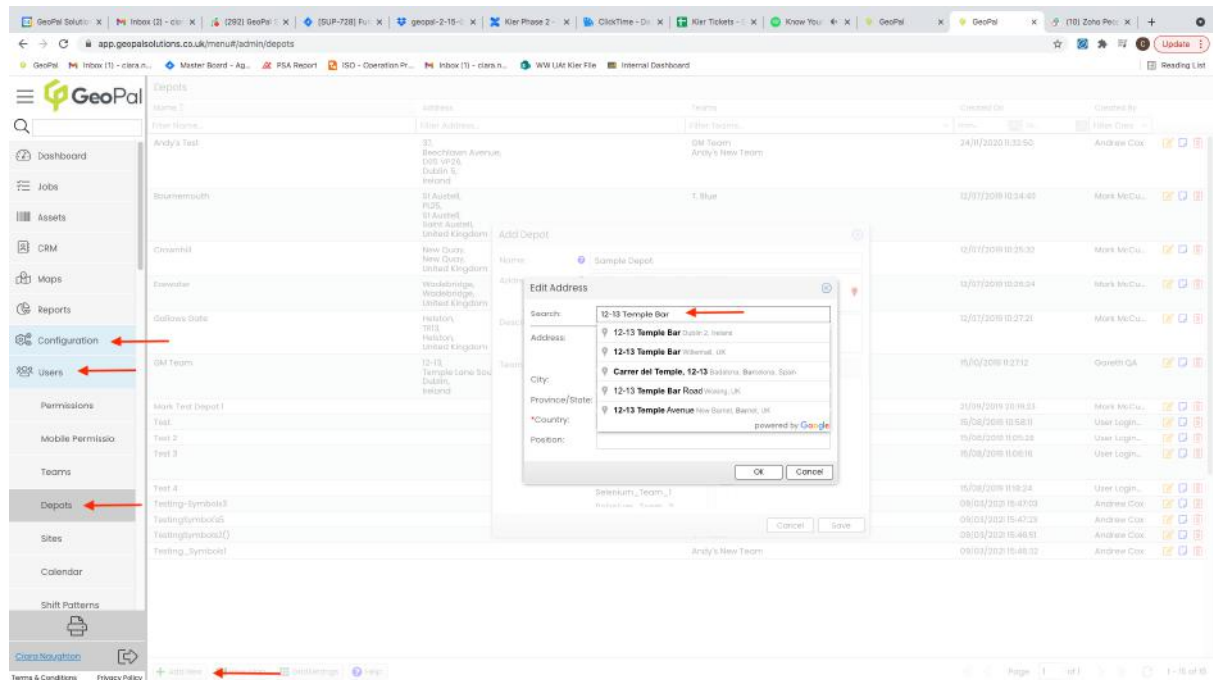
Table 1: Configuration - Teams

Team Name	Is Template	Employees	Employees
Judy's New Team	1 Mock Mock Test	0	0
Olivia's Team		0	2
Old Team	Test_Old_Template	1	0
gms team		0	0
carthraas		0	0
New Order Team		0	5
sorbs		0	0
Seleniam_Team_1		0	0
Seleniam_Team_2		0	0
Seleniam_Team_3		0	0
T. Blue		0	2
T. Green		0	2
T. Red		0	2
T. Yellow		0	3
Team MP		0	1
Team Tuglus	Test	2	5
Test Team		0	2
Test Team 2		0	2
Test Team 3		0	2

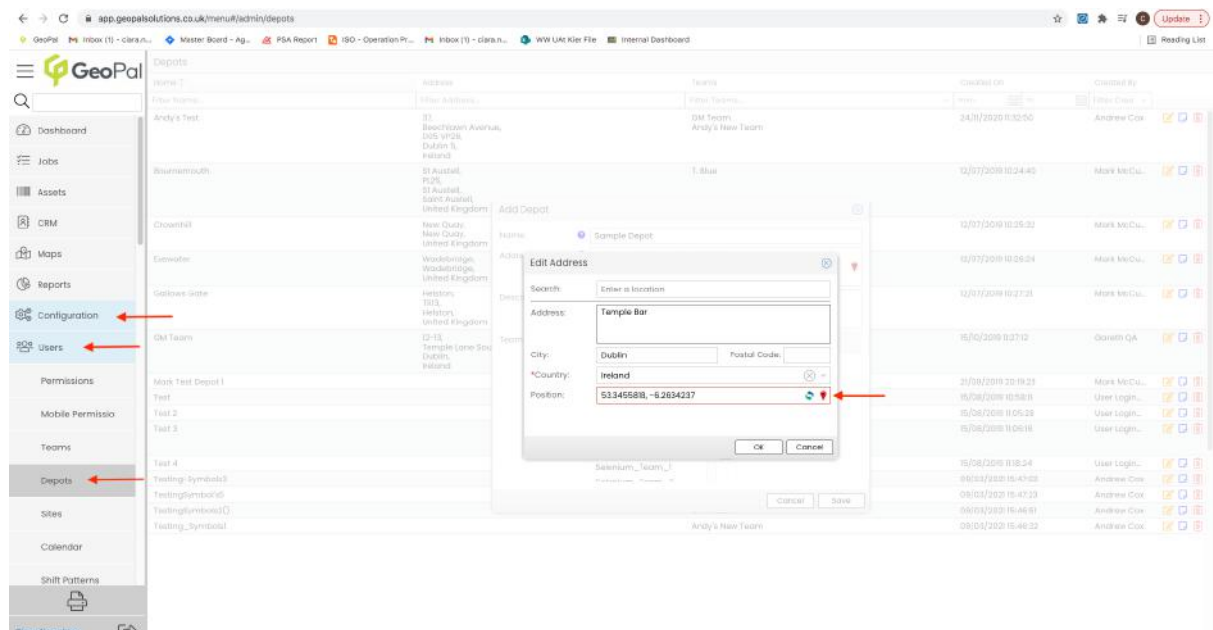
A 'Depot' can be created through the following steps:

-

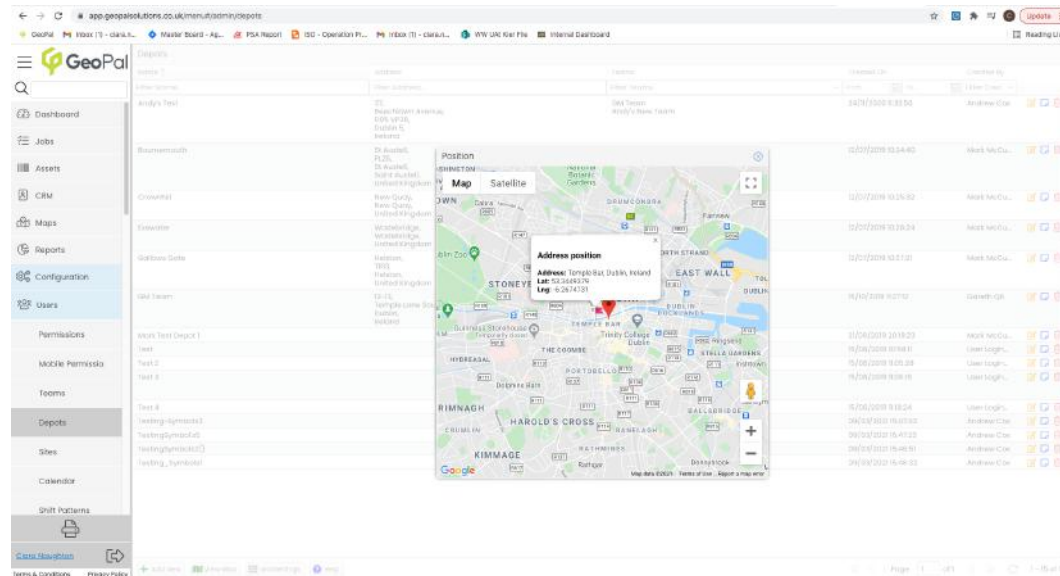
- Search the address using the search bar



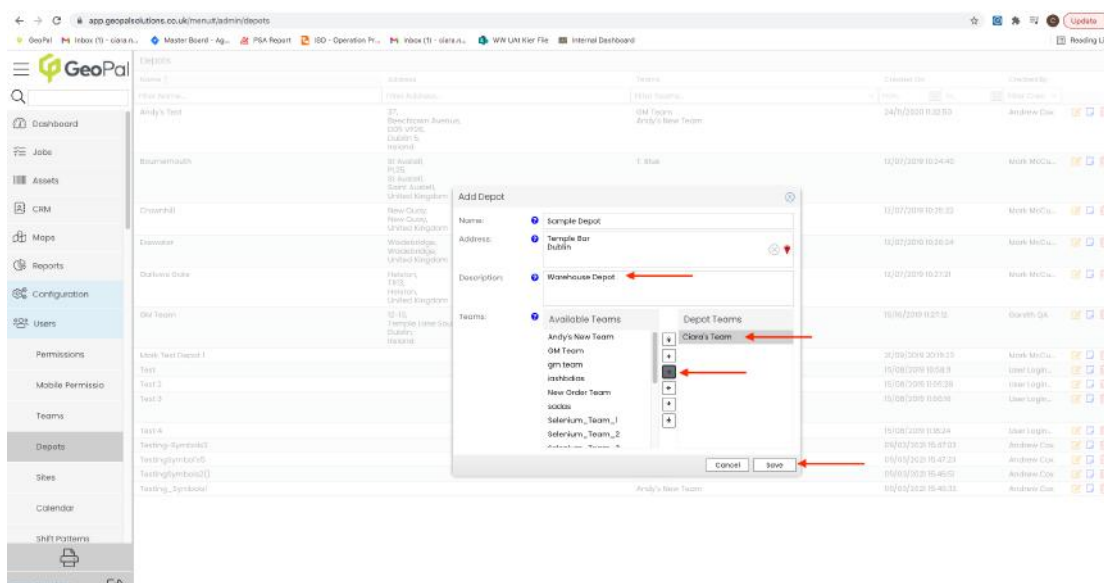
- Once a result is selected the address fields will auto complete



- The location can be checked using the red pin icon on the position field which will display the map view



- Complete the 'Description' field
- Highlight the 'Teams' from the 'Available Teams' panel and select the '>' button to assign this team to the depot
- Individual teams can be assigned to multiple depots if required
- Select 'Save' once all teams have been added



- The newly created depot will now display on the depots list
- This can be edited or deleted if required using the edit and delete icons

Depots					
Name	Address	Teams	Created On	Created By	
Filter Name...	Filter Address...	Filter Teams...	From... To...	Filter Cre...	
Andy's Test	31, Beechmount Avenue, D55 VPS, Dublin 5, Ireland	GM Team Andy's New Team	26/11/2020 11:33:50	Andrew Cox	
Bournemouth	St Austell, PL25, St Austell, SAKEL Austell, United Kingdom	T. Blue	12/07/2019 10:24:40	Mark McCu...	
Crownhill	New Quay, New Quay, United Kingdom	T. Green	12/07/2019 10:25:32	Mark McCu...	
Exmouth	Wadebridge, Wadebridge, United Kingdom	T. Red	12/07/2019 10:26:24	Mark McCu...	
Salters Gate	Holston, TB13, Holston, United Kingdom	T. Yellow	12/07/2019 10:27:21	Mark McCu...	
GM Team	12-15, Temple Lane South, Dublin, Ireland	GM Team	15/10/2019 11:27:12	Gareth QA	
Mark Test Depot 1		T. Yellow	21/04/2019 20:19:23	Mark McCu...	
Sample Depot	Temple Bar, Dublin, Ireland	Clara's Team Andy's New Team	14/04/2021 12:27:00	-Gareth QA-	
Test			15/08/2019 10:58:11	User Login...	
Test 2			15/08/2019 11:05:28	User Login...	
Test 3		Test Team Test Team 2 Test Team 3	15/08/2019 11:05:16	User Login...	
Test 4		GM Team	15/08/2019 11:18:14	User Login...	
Testing-Symbols3		Andy's New Team	09/03/2021 15:47:03	Andrew Cox	
TestingSymbol45			09/03/2021 15:47:23	Andrew Cox	
TestingSymbol21		GM Team	09/03/2021 15:46:43	Andrew Cox	
Testing_Symbol41		Andy's New Team	09/03/2021 15:46:32	Andrew Cox	

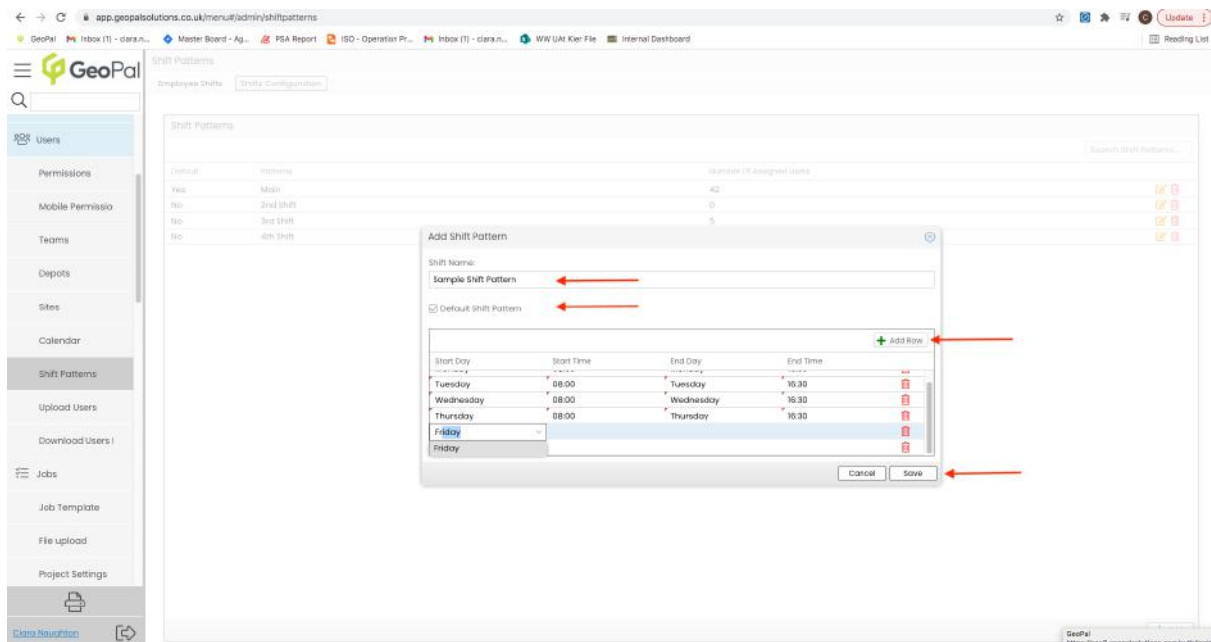
1.3. Shift Patterns

Shift Patterns can be created and applied to users to indicate their normal working days and hours on the activity planner.

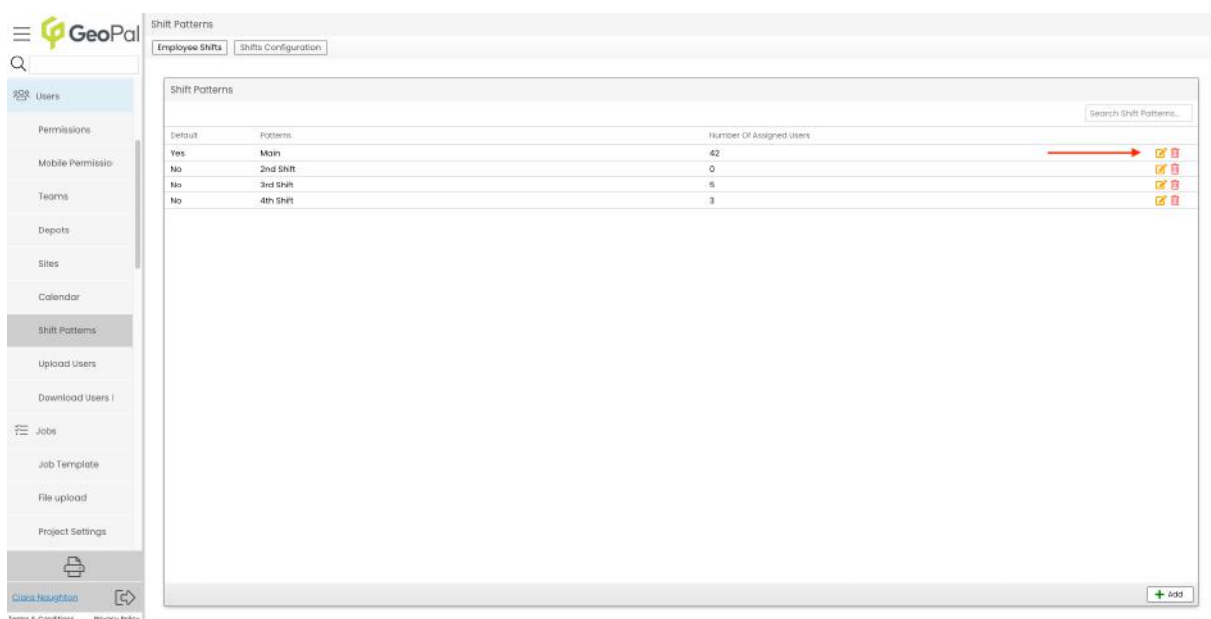
Shift patterns can be created and applied through the following steps:

- Select 'Configuration'
- Under 'Users', select 'Shift Patterns'
- Select the 'Shifts Configuration' tab

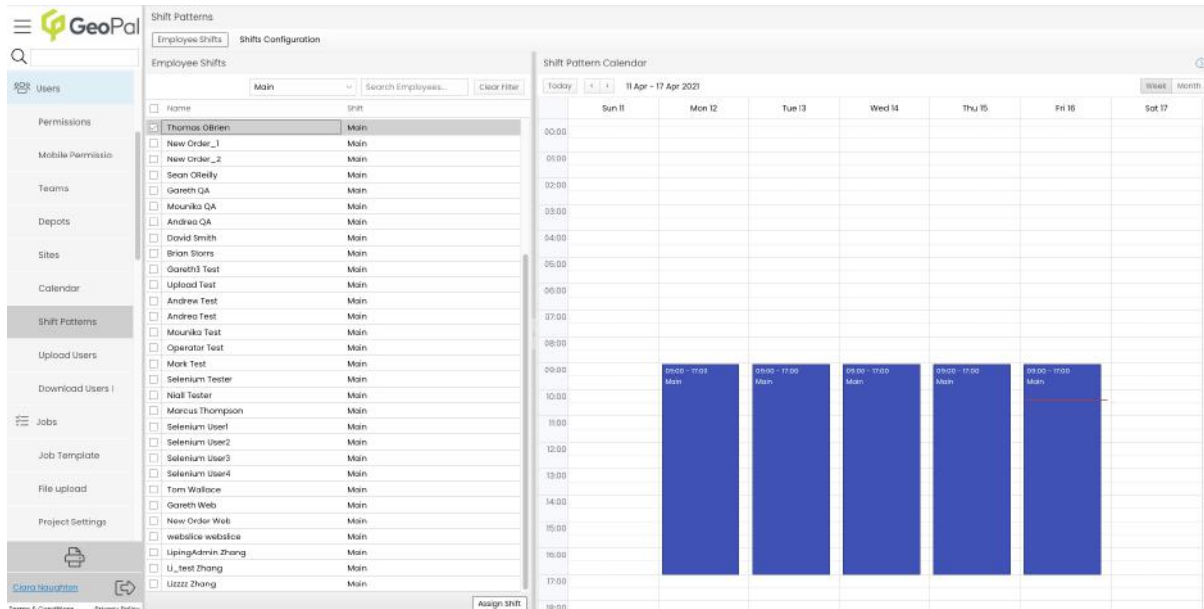
- Select 'Add' button
- Enter a 'Shift Name'
- Select whether the shift should be set as the 'Default Shift Pattern' – all users will be automatically added to this shift pattern
- Select 'Add Row' to add the start/end day and time for the shift
- Once entered select 'Save'



- The added shift will show on the Shift Patterns list and can be edited or deleted from here

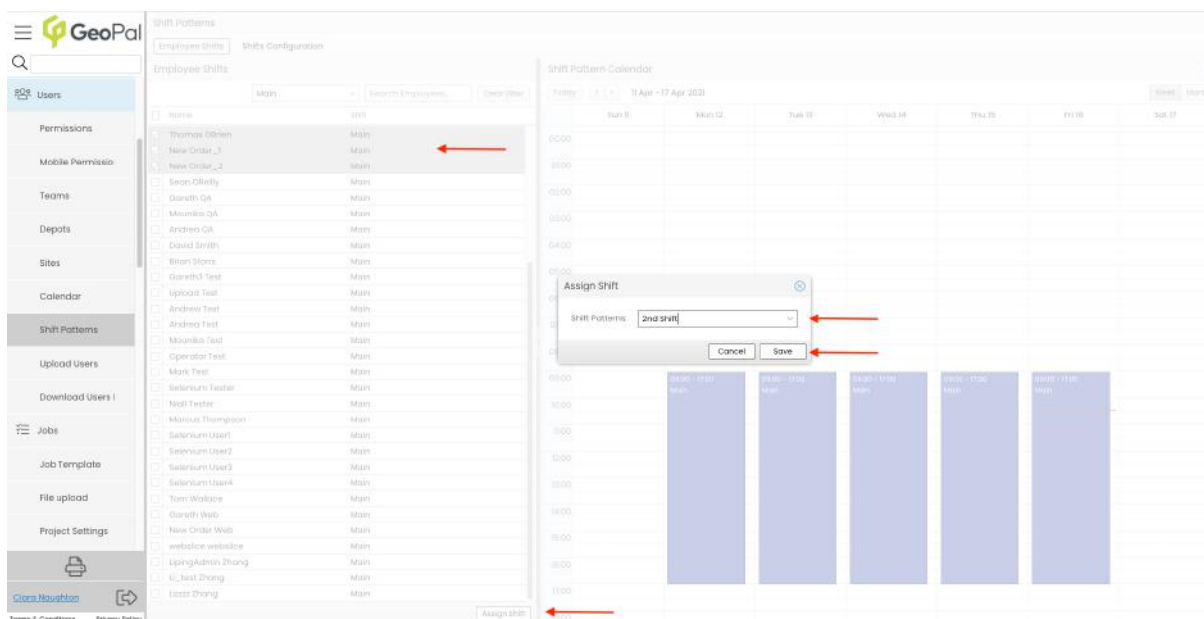


- Once the shift patterns have been created, these can be applied to users using the 'Employee Shifts' tab



The screenshot shows the GeoPal interface with the 'Shift Patterns' section selected. The 'Employee Shifts' tab is active, displaying a list of users and their assigned shift patterns. The 'Shift Pattern Calendar' is visible on the right, showing a weekly view of shift assignments. The calendar shows a grid of days (Sun 11 to Sat 17) and time slots (00:00 to 18:00). Blue bars indicate assigned shifts, such as 'Main' shifts from 09:00 to 17:00 on various days.

- Multiple or individual users can be selected at a time when assigning a shift pattern
- Select the 'Assign Shift' button
- Select the required 'Shift Pattern' from the dropdown list and select 'Save'
- The shift pattern selected will be assigned to all users selected and will be displayed on the shift pattern calendar and on the activity planner



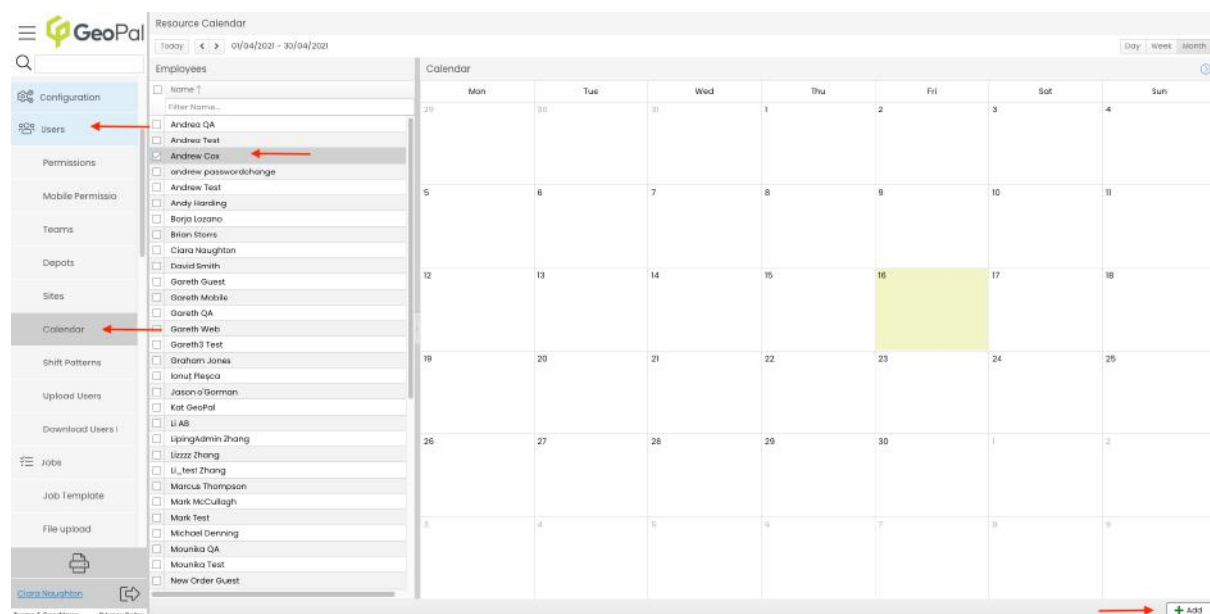
This screenshot shows the 'Assign Shift' dialog box overlaid on the 'Shift Pattern Calendar'. The dialog box has a dropdown menu for 'Shift Patterns' with '2nd shift' selected. Red arrows point to the 'Assign Shift' button at the bottom of the calendar, the 'Shift Patterns' dropdown, and the 'Save' button in the dialog box. The background shows the same calendar grid as the previous screenshot, with blue bars representing assigned shifts.

1.4. Calendar

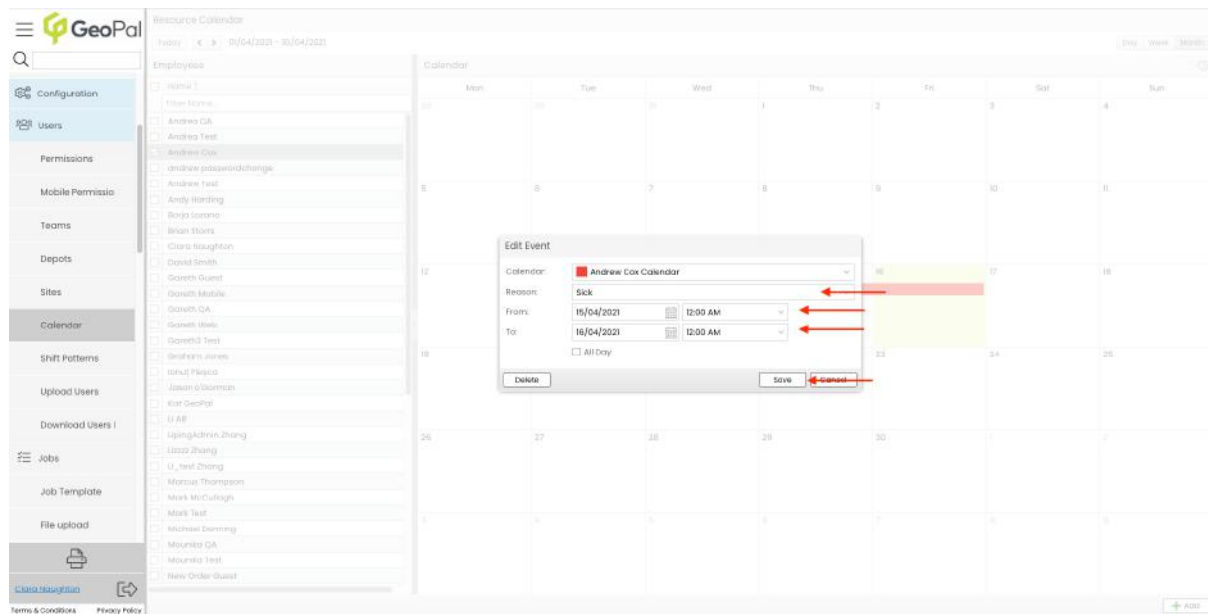
The calendar function can be used to indicate certain leave types for a user that will show on the activity planner and indicate days when they are unavailable

Leave can be created and applied to users through the following steps:

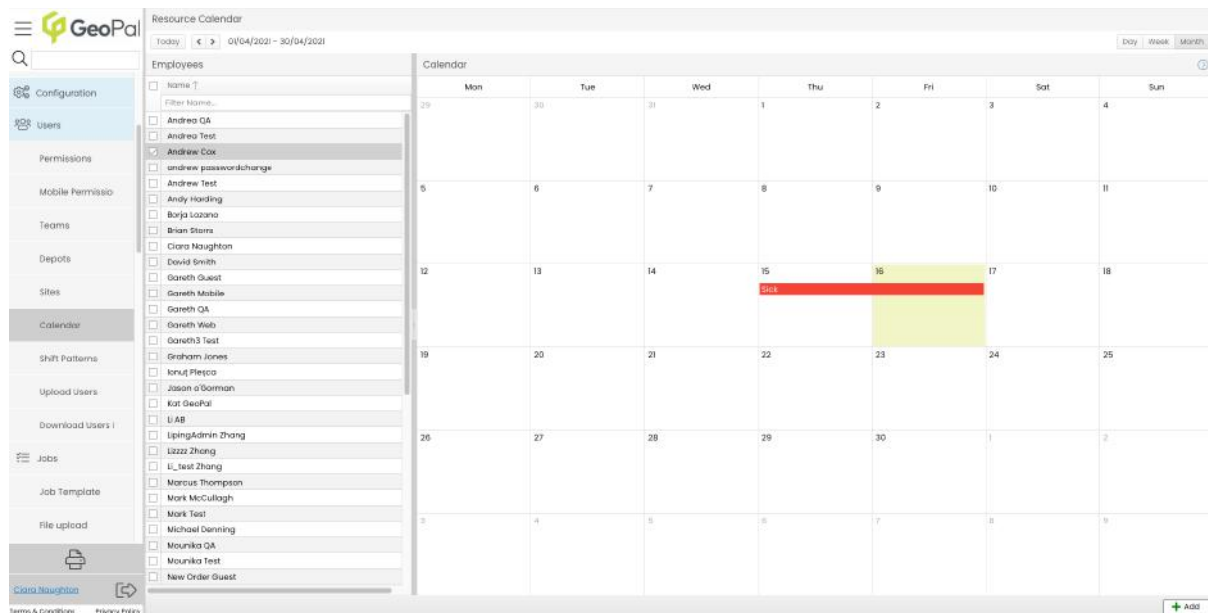
- Select 'Configuration'
- Under 'Users', select 'Calendar'
- Select the employee name that requires leave
- Select the 'Add' button on the bottom right hand side



- Select a 'Reason' from the dropdown list
- Complete the From and To fields
- Select 'Save'
- Existing leave entries can also be deleted from this section using the 'Delete' button



- Once saved, the leave will appear on the calendar and on the activity planner



1.5. Activity Planner Settings

The Activity Planner Settings section is used to configure the settings and display of the activity planner.

- Planned Job Settings

- This setting will automatically assign all jobs that are in a status of 'Planned' have a planned date for the next working day
- The time selected should be after the end of the current working day

- Scheduler Display Range

- This allows the planner display to be set at a specific start and end time, generally working hours

- The start and end time set here will feed into the 'Business Hours' display option on the activity planner screen

Resources	Time Used (hrs)
Andrew Cox	00:00 of 00:00
Andrew Test	00:00 of 08:00
Andy Harding	00:00 of 08:00
David Smith	00:00 of 08:00
Gareth Mobile	00:00 of 00:00
Gareth QA	00:00 of 08:00
Gareth Web	00:00 of 08:00
Graham Jones	00:00 of 08:00
Mark McCullagh	00:00 of 00:00
Michael Denning	00:00 of 08:00
Sean O'Reilly	00:00 of 08:00
Tom Wallace	00:00 of 08:00

- Map Settings

- There are 2 setting for the map view where conditions can be set to display certain text and colours for the job pins on the map based on the rules configured
- The example below shows that the Job ID should show as text on the map icon and the default colour for all jobs should be green
- Multiple conditions can be set if required i.e. different text to display for certain job types/templates etc. Different colours to display for different job types and statuses etc.

Map Settings

Job Icon Text

Default: JOB_IDENTIFIERS Insert Field...

Job Icon Colour

Default: 339665 [Green Swatch]

+ New Condition

- Once the conditions are set, these will display for the job icon on the map. In this case Job ID as text and default all jobs to green

Activity Planner

Search...

Resources

- Depots
 - Andy's Test
 - Bournemouth
 - Crownhill
 - Erewater
 - Gallows Gate
 - GM Team
 - Mark Test Depot1
 - Sample Depot
 - Test
 - Test 2
 - Test 3
 - Test 4
 - Testing-Symbols3
 - TestingSymbols5
 - TestingSymbols20
 - Testing-Symbols1

Jobs

Map Satellite

Day Week Month 18/04/2021 No filter

Global Search...

Job Id: 140 Address: United Kingdom

Job Id: 139 Address: United Kingdom

Job Id: 138 Address: United Kingdom

Job Id: 137 Address: United Kingdom

Job Id: 136 Address: United Kingdom

Job Id: 135 Address: United Kingdom

Job Id: 134 Address: United Kingdom

Job Id: 133 Address: United Kingdom

Job Id: 132 Address: United Kingdom

Job Id: 131 Address: United Kingdom

Job Id: 130 Address: United Kingdom

Job Id: 129 Address: United Kingdom

Job Id: 128 Address: United Kingdom

Job Id: 127 Address: United Kingdom

Job Id: 126 Address: United Kingdom

Job Id: 125 Address: United Kingdom

Job Id: 124 Address: United Kingdom

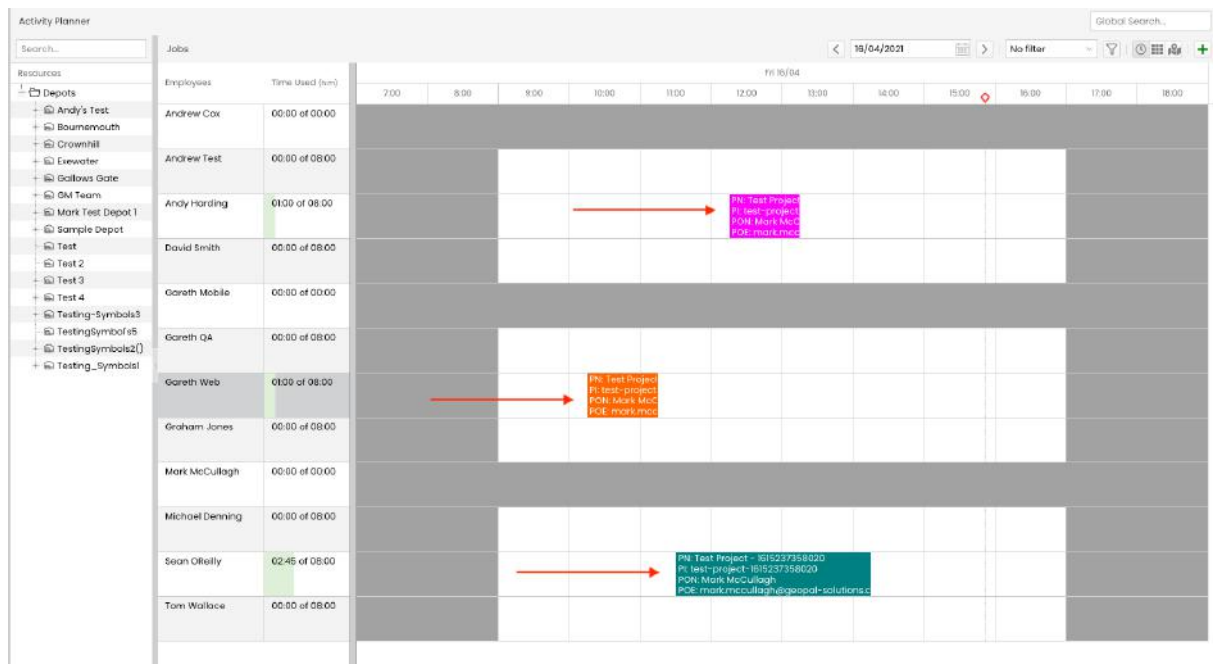
- Scheduler Settings

- This section is used to configure the job display when using the gantt view
- Job Text: Job fields can be set to be displayed on the job tile by selecting the 'Insert Field' value
- Conditions can also be set to display different text for different jobs based on the rules set
- Job Colour: The colour of the job tile can be set here. A default colour can be set for all jobs and additional conditions can also be created using the condition builder
- Examples for use of different colours are:
 - Different colours for different job templates to easily distinguish at a glance what type of work is assigned
 - Different colours for different job statuses to easily distinguish at a glance which jobs are in progress, completed, not started etc.

The screenshot displays the 'Scheduler Settings' window, which is divided into three main sections:

- Job Text:** This section allows users to configure the text displayed on job tiles. The 'Default' field is set to a string containing project details: `PN: %PROJECT_NAME%, PI: %PROJECT_IDENTITY%, PO: %PROJECT_OWNER_NAME%, POE: %PROJECT_OWNER_EMAIL%`. An 'Insert Field...' button is available for selecting additional fields. A '+ New Condition' button is located at the bottom right.
- Job Colour:** This section configures the colors for job tiles. The 'Default' color is set to 'FF6600' (orange). Below this, there are two conditional rules:
 - Rule 1: 'Job Template Name' is 'Equal To' 'Test_OM_Template', resulting in an output color of 'FF00FF' (pink).
 - Rule 2: 'Job Template Name' is 'Equal To' 'Test_Runbook', resulting in an output color of '008080' (green).Each rule has an 'Add Rule' button and a color swatch.
- Scheduler Job Agenda Workflows:** This section shows a table of job templates and their associated workflows. The table has columns for 'Templates', 'Travel Start', 'Travel End', 'Job Start', and 'Job End'. The first two rows are '1Mark MCC Test' and 'NIAL TEST', both with 'Check In' workflows.

- The example above shows that the project name, id, owner name and email have been set to display for the job text.
- The example above shows that the default colour for jobs is orange but if they meet either of the conditions set they should display either pink or green
- The settings configured display as follows as on the activity planner



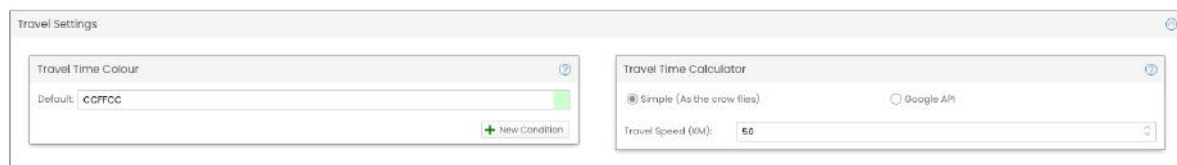
- Scheduler Job Agenda Workflows

- This setting is used to set which steps from which template determine the start travel, end travel, start job and end job times once the job has been completed. The duration of the jobs travel time and work time will be resized on the Gantt based on the values captured

Scheduler Job Agenda Workflows					
Templates	Travel Start	Travel End	Job Start	Job End	
T Mark McC Test	Enter Date	Enter Date	Enter Text	Scriptable	
NIAL TEST	Check In	Check In	Check In	Check In	

- Travel Settings

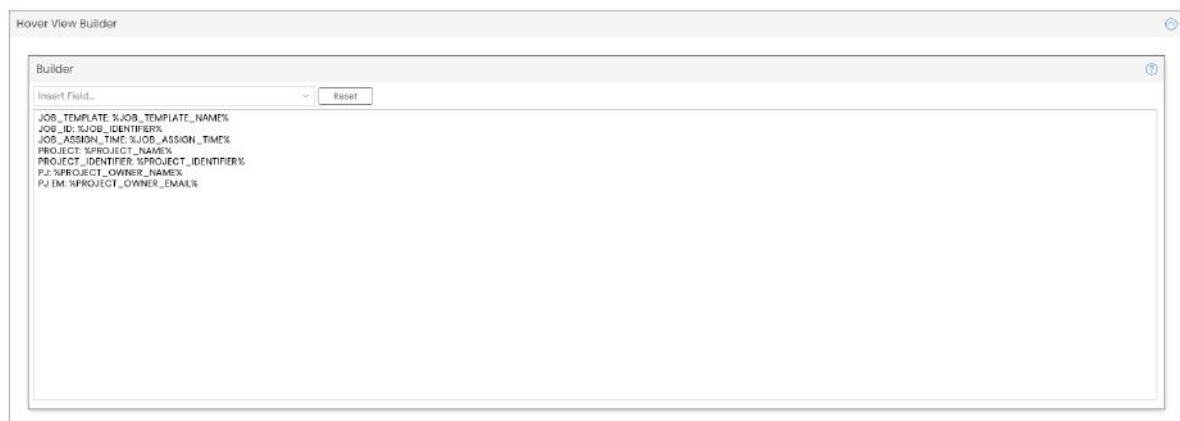
- This setting is used to configure the colour that travel time is displayed on the Gantt view based on the conditions met and how travel time is calculated
- Conditions for the colour displayed can be added using the 'New Condition' button and defining the conditions for that colour
- The travel time calculated can be either set at a flat KM per hour or calculated using Google Map API (additional charges apply)
- From the example below, the default colour for travel time has been set to green and the travel time is calculated using a flat speed of 50km per hour. The travel time is calculated based on the distance from the depot to job location for the first job and from job to job thereafter



The screenshot shows the 'Travel Settings' dialog box with two main sections. The 'Travel Time Colour' section on the left has a 'Default' dropdown set to 'C0FFCC' and a green color swatch. A '+ New Condition' button is located below. The 'Travel Time Calculator' section on the right has two radio buttons: 'Simple (As the crow flies)' (selected) and 'Google API'. Below these is a 'Travel Speed (KM)' input field set to '50'.

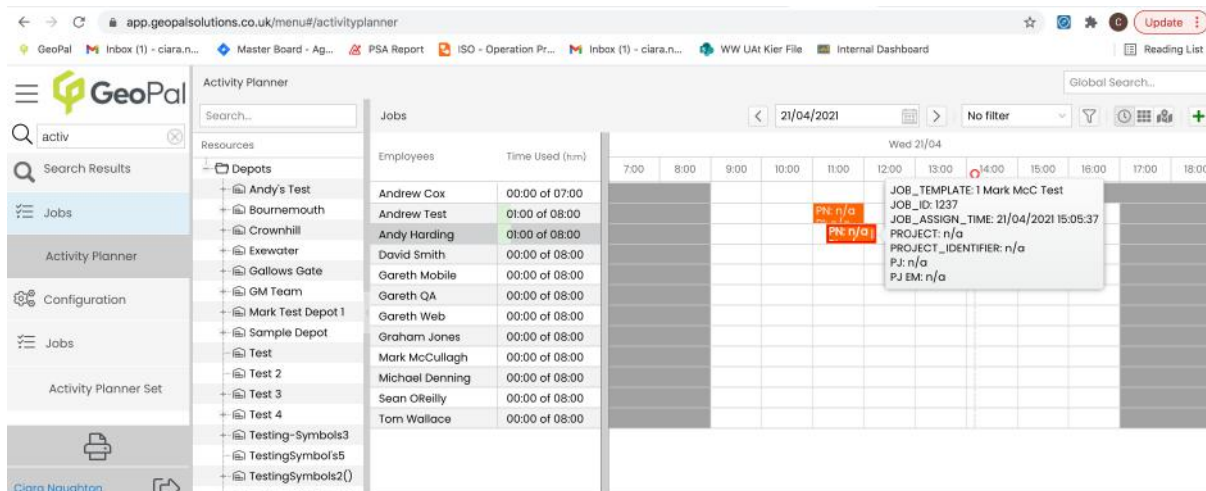
- Hover View Builder

- This section is used to configure the text and data displayed when the user hovers over a job on the Gantt or map view
- Freetext and job fields can be inserted using the 'Insert' button



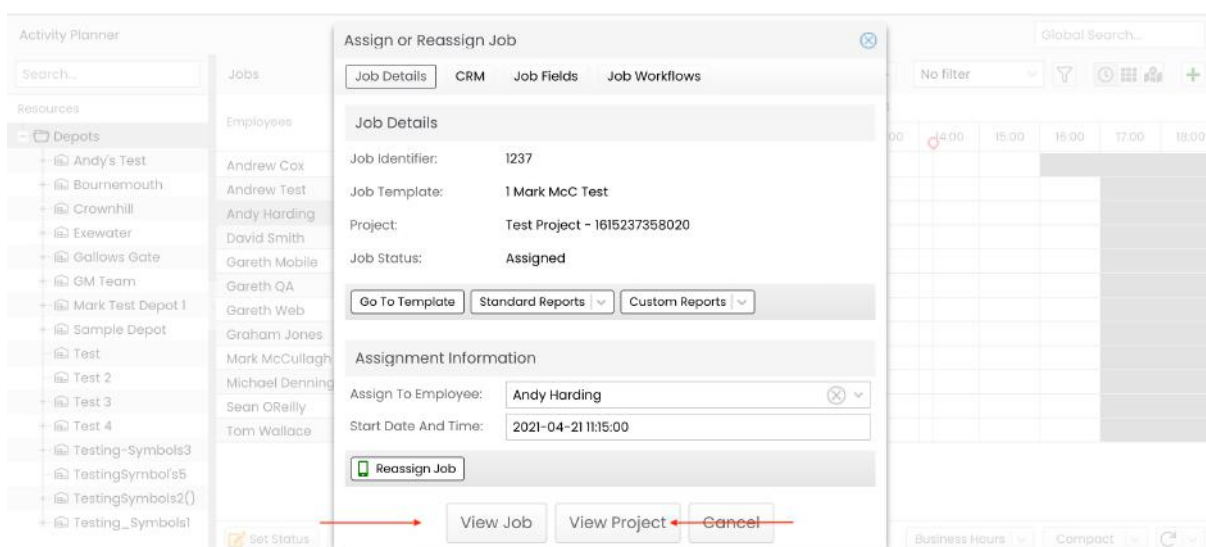
The screenshot shows the 'Hover View Builder' dialog box. It features a 'Builder' section with an 'Insert Field...' button and a 'Reset' button. Below these is a large text area containing a list of available fields: 'JOB_TEMPLATE %JOB_TEMPLATE_NAME%', 'JOB_ID %JOB_ID%', 'JOB_ASSIGN_TIME %JOB_ASSIGN_TIME%', 'PROJECT %PROJECT_NAME%', 'PROJECT_IDENTIFIER %PROJECT_IDENTIFIER%', 'PJ %PROJECT_OWNER_NAME%', and 'PJ EM %PROJECT_OWNER_EMAIL%'. The text area is currently empty, showing only the list of fields.

- The hover view displays like below on the activity planner based on the settings set in the above image



- Job Settings

- This setting is used to customise the page that is opened when the user selects the 'View Job' or 'View Project' button from the activity planner
- Information on the URL required may need confirmation from your Account Manager



- This section is used to configure which job fields can be searched when using the global search on the activity planner
- From the example below the Job ID has been set to be searched

Global Search Settings

Search Fields

☒ Job Id

☐ Project Identifier

☐ Contact Identifier

☒ Job Identifier

☐ Project Name

☐ Assigned To Name

☐ Job Fields

☐ Asset Name

☐ Assigned To Identifier

☐ Job Notes

☐ Asset Identifier

☐ Created By Name

☐ Job Template Name

☐ Company Name

☐ updated By Name

☐ Job Status Name

☐ Company Identifier

☐ Job Address

☐ Contact Name

- Once configured the user can search these fields using the global search on the activity planner as displayed below

The screenshot displays the GeoPal Activity Planner web application. The top navigation bar includes the GeoPal logo and a search bar. The left sidebar contains a menu with options: 'Jobs', 'Configuration', 'Activity Planner Set', and 'Activity Planner'. The main content area is titled 'Activity Planner' and features a search bar and a list of resources. The 'Jobs' section is active, showing a table with columns for 'Employees' and 'Time Used (h:m)'. The table lists employees and their time usage for a specific job. A date range of '21/04/2021' is selected. A modal window is open, displaying details for 'Job: 1237', including 'Project: Test Project' and 'Matched On: 21/03/2021 - 21/04/2021'.

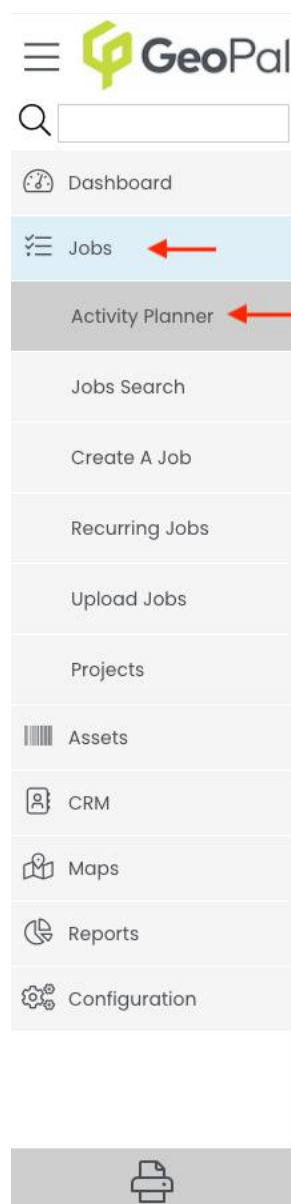
2. Activity Planner

2.1. Accessing the Activity Planner

The activity planner can be accessed two ways:

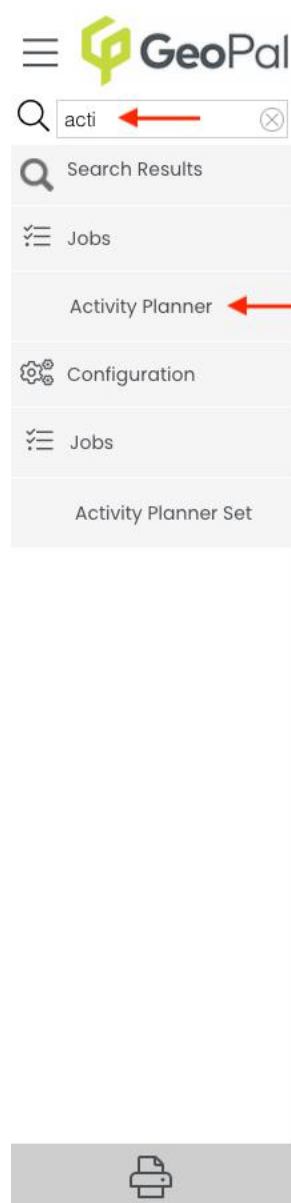
Option 1:

- Select the 'Jobs' tab on the left-hand menu
- Select 'Activity Planner'

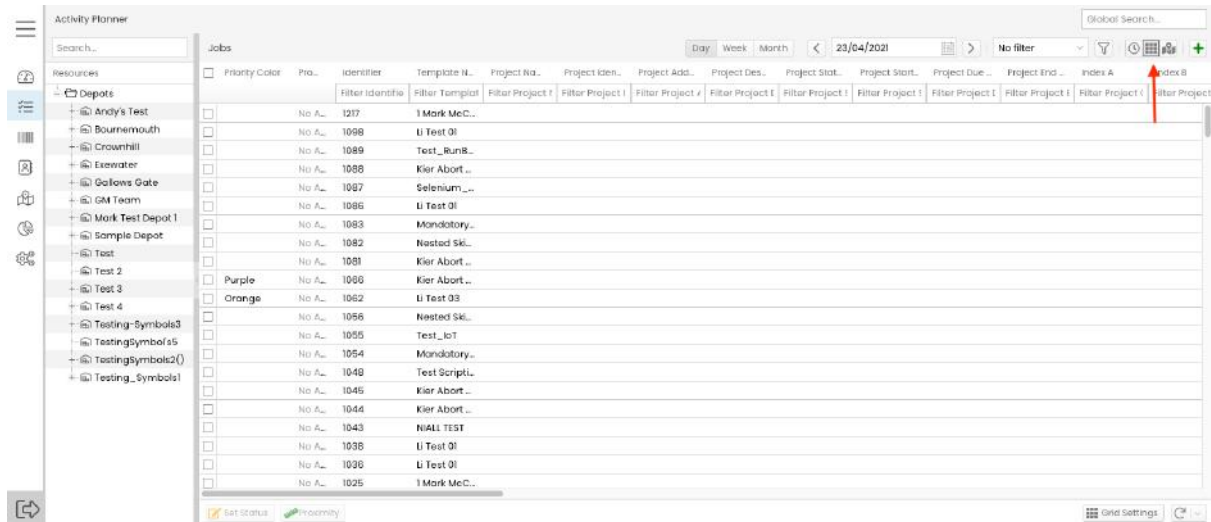


Option 2:

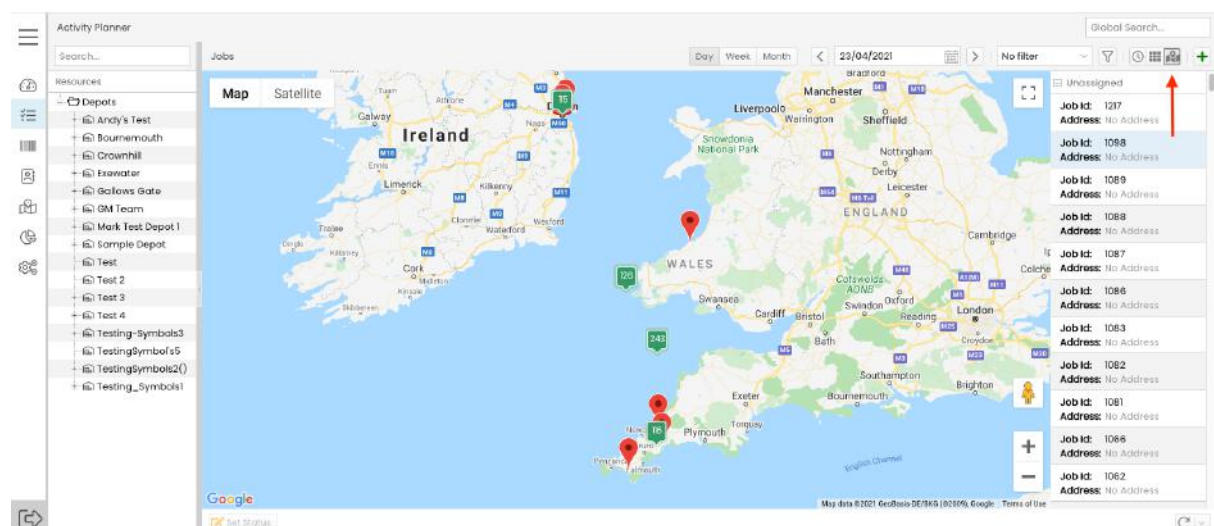
- Begin to search for 'Activity Planner' in the search bar
- Select the 'Activity Planner' once displayed



- **'Grid' icon:** This option displays grid list of all jobs that been created including jobs that have been unassigned. The 'Grid Settings' button can be used to configure the columns that are visible on the grid list.



- **'Map' icon:** This option displays the jobs that have been planned or assigned on the map based on the address against the jobs. Employee locations and depot locations are also visible on this view



- Activity Planner**

Search:

Jobe

Employees Time Used (hrs)

	7:00	8:00	9:00	10:00	11:00	12:00	13:00	14:00	15:00	16:00	17:00	18:00
Andrew Cox	00:00 of 00:00											
Andrew Test	00:00 of 00:00											
Andy Harding	00:00 of 00:00											
David Smith	00:00 of 00:00											
Gareth Mobile	00:00 of 00:00											
Gareth GA	00:00 of 00:00											
Gareth Web	00:00 of 00:00											
Graham Jones	00:00 of 00:00											
Mark McCutagh	00:00 of 00:00											
Michael Downing	00:00 of 00:00											
Sarah O'Leary	00:00 of 00:00											
Tom Wallace	00:00 of 00:00											

Get Status Assign (X)

Business Hours - Compare -

Search:

Resources

Depots

 - Andy's Test
 - Bournemouth
 - Crownhill
 - Dewwater
 - Dukins Gate
 - Old Team
 - Mock Test Depot.
 - Sample Depot
 - Test
 - Test 2
 - Test 3
 - Test 4
 - Testing-Symbol.
 - TestingSymbol.
 - TestingSymbol.

Jobe

Day View Month

20/04/2021 No Filter

Priority Color	PID	Identifier	Template ID	Project ID	Project Start	Project End	Project SDE	Project DUE	Index A	Index B	Index C	Index D	Index E
	N/A	1217	I Mock Mrc.										
	N/A	1068	I Test 01										
	N/A	1069	Test_Sumb.										
	N/A	1068	Klar Abort ...										
	N/A	1067	Solarium...										
	N/A	1066	I Test 03										
	N/A	1063	Mandakity...										
	N/A	1062	Realist SKL										
	N/A	1061	Klar Abort ...										
Purple	N/A	1066	Klar Abort ...										
Orange	N/A	1062	I Test 03										
N/A	1056	Realist SKL											
Purple	N/A	1061	Klar Abort ...										

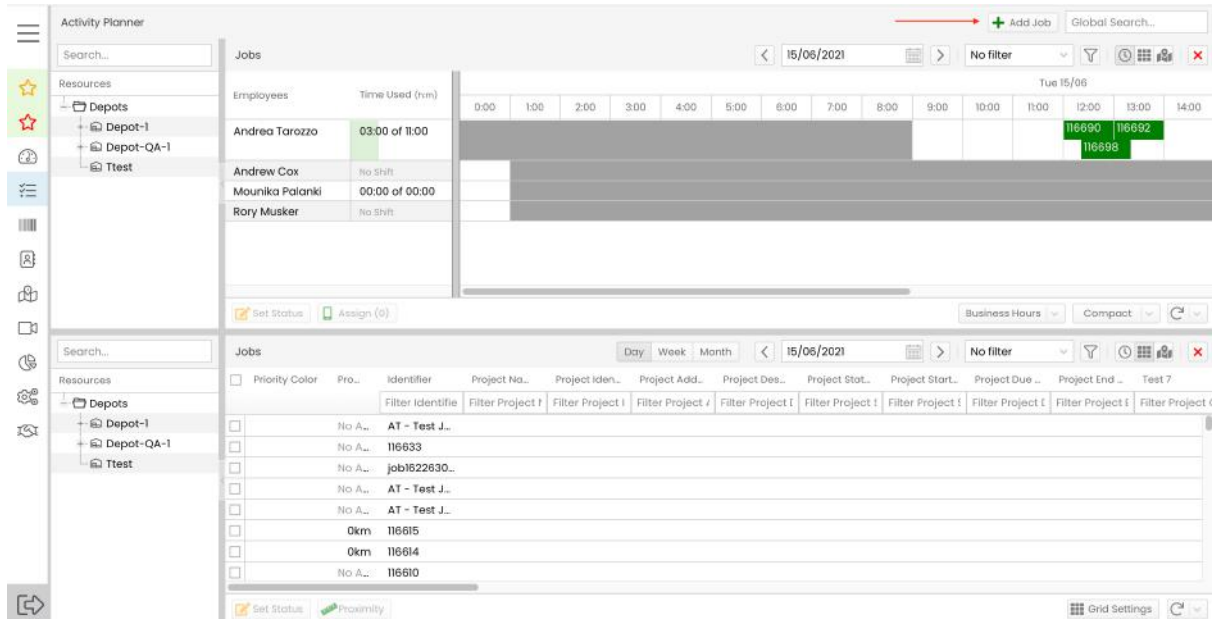
Get Status Availability

Grid Settings

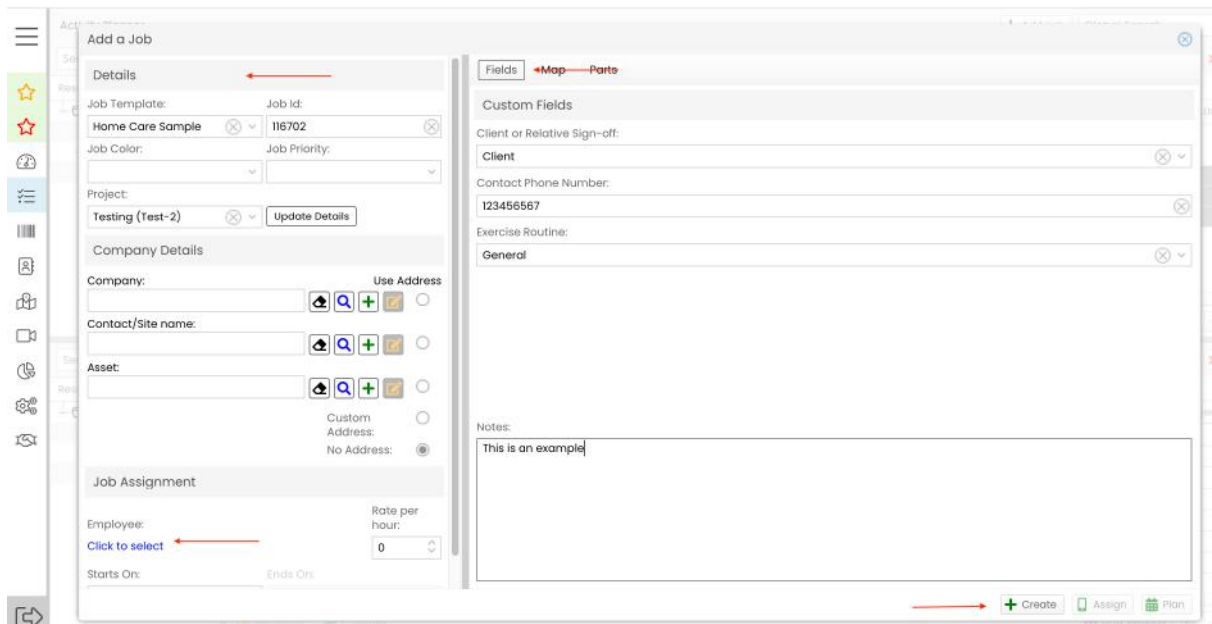
- [illegible]

2.3. Creating a Job

- Jobs can be created using the 'Add job' button in the top right-hand side of the screen
- Once selected, users should complete the fields required for the job
- The job can either be created, planned or assigned to a user from the create screen
- Jobs that are unassigned will appear in the job list view on the planner
- Jobs that are assigned or planned will show against the assigned user on the Gantt view



The screenshot displays the 'Activity Planner' interface. On the left, a sidebar shows a tree view of resources including 'Depots' (Depot-1, Depot-QA-1) and 'TTest'. The main area is divided into two sections. The top section is a Gantt chart for 'Tue 15/06', showing time slots from 0:00 to 14:00. It lists employees: Andrea Tarozzo (03:00 of 11:00), Andrew Cox (No Shift), Mounika Palanki (00:00 of 00:00), and Rory Musker (No Shift). The bottom section is a 'Jobs' table with columns: Priority, Color, Pro., Identifier, Project No., Project Iden., Project Add., Project Des., Project Stat., Project Start., Project Due., Project End., and Test 7. The table lists several jobs, including 'AT - Test J.', '116633', 'job1622630...', 'AT - Test J.', 'AT - Test J.', '0km 116615', '0km 116614', and '116610'. The interface includes search bars, filters, and navigation controls.



The screenshot displays the 'Add a Job' form. The form is divided into several sections. The 'Details' section includes fields for 'Job Template' (Home Care Sample), 'Job Id' (116702), 'Job Color', and 'Job Priority'. The 'Project' section includes a dropdown for 'Testing (Test-2)' and an 'Update Details' button. The 'Company Details' section includes fields for 'Company', 'Contact/Site name', and 'Asset', with a 'Use Address' checkbox. The 'Job Assignment' section includes a dropdown for 'Employee' (Click to select) and a 'Rate per hour' field (0). The 'Custom Fields' section includes fields for 'Client or Relative Sign-off' (Client), 'Contact Phone Number' (123456567), and 'Exercise Routine' (General). The 'Notes' section includes a text area with the placeholder text 'This is an example'. The form includes navigation buttons at the bottom: 'Create', 'Assign', and 'Plan'.

2.4. Assigning Jobs

Jobs can be assigned to users in 2 ways:

- **Drag and Drop** using a split screen of Gantt and list view
 - Select the job from the list view that needs to be assigned
 - Drag the job from the list view into the Gantt view to the preferred mobile user for the time and date required
 - This will put the job in a status of 'Planned'. The user can then select the 'Assign' button to assign the job immediately or it can be auto assigned if the 'Planned Job Setting' has been configured
 - Once 'Assigned' the job will show on the assigned to users' mobile device

The screenshot shows the 'Activity Planner' interface. On the left is a sidebar with a search bar and a list of resources categorized under 'Depots' (e.g., Andy's Test, Bournemouth, Crownhill, Exewater, Gallows Gate, GM Team, Mark Test Depot 1, Sample Depot, Test, Test 2, Test 3, Test 4). The main area is split into two panes. The top pane is a Gantt chart for the date 23/04/2021, showing a timeline from 7:00 to 18:00. A red arrow points from a job in the list view to a specific time slot in the Gantt chart. The bottom pane is a list view of jobs with columns: Priority, Color, Pro., Identifier, Template No., Project No., Project Ident., Project Add., Project Des., Project Stat., Project Start., Project Due., and Project End. A job is highlighted in the list view, and a red arrow points from it to the Gantt chart.

The screenshot shows the 'Activity Planner' interface with the 'Assign All' dialog box open. The dialog box has a title bar 'Assign All' and a close button. It contains a table with columns: Ide., Status, Pe., Template No., Assigned To, Assigned Time, Estimated, and Created By. The table shows one row with the following data: Ide. 10, Status Planned, Pe. 10, Template No. LI Test 01, Assigned To Gareth QA, Assigned Time 23/04/2021 11:00, Estimated 1h, and Created By Clara No. Below the table, there is a section 'Assign To:' with a dropdown menu showing 'Gareth QA' and a button 'Set Others Status'. There is also a button 'Set All'. At the bottom, there is a button 'Assign' and a button 'Close'. A hint text says 'Hint: double-click on a row to edit its values'.

- The other option for assigning jobs is through the **assign screen**:
 - o To access this screen, users should double click on a job from the list view
 - o The screen pictured below will be displayed
 - o The user should then select an employee from the 'Assign To Employee' and a 'Start Date and Time'
 - o Once these are completed, the user can select the 'Reassign Job' button. This will immediately assign the job to the selected mobile users' device

The screenshot shows the 'Activity Planner' interface. On the left, there's a sidebar with 'Resources' and 'Depots' listed. The main area is divided into 'Jobs' and 'Employees'. The 'Jobs' section shows a list of jobs with columns for Priority, Color, Pro., Identifier, Template N., Project No., Project Iden., Project Add., Project Des., Project Stat., Project Start., Project Due., and Project End.. The 'Employees' section shows a grid of time slots (7:00 to 18:00) for various employees. A red arrow points to the 'Test_101' job in the list, which is highlighted in blue.

This screenshot shows the 'Assign or Reassign Job' dialog box open over the Activity Planner. The dialog has tabs for 'Job Details', 'CRM', 'Job Fields', and 'Job Workflows'. The 'Job Details' tab is active, showing fields for 'Job Identifier' (1021), 'Job Template' (Test_101), 'Project' (Unassigned), and 'Job Status' (Unassigned). Below these are buttons for 'Go To Template', 'Standard Reports', and 'Custom Reports'. The 'Assignment Information' section shows 'Assign To Employee' (Ciara Naughton) and 'Start Date And Time' (2021-04-23 14:55:00). At the bottom, there are buttons for 'Reassign Job', 'View Job', and 'Cancel'. A red arrow points to the 'Reassign Job' button.

2.5. Filters

Custom filters can be created so users can group together data based on certain rules and conditions.

- **Selecting Filters:** Existing filters can be accessed through the filter dropdown and selecting the filter required from the dropdown list.

The screenshot shows the 'Activity Planner' interface. On the left, there's a sidebar with a search bar and a list of resources under 'Depots' and 'GM Team'. The main area is a calendar view for Friday, 23/04/2021. It shows a grid of time slots from 7:00 to 18:00. Employees listed include Andrew Cox, Andrew Test, Andy Harding, David Smith, Gareth Mobile, Gareth QA, Gareth Web, Graham Jones, Mark McCullagh, and Michael Denning. A filter dropdown is visible in the top right corner, currently set to 'No filter'.

- **Editing and Deleting Filters:** This can be done by selecting the 'Funnel' icon which will display the list of available filters. These filters can be edited or deleted using the 'Pen' or 'Bin' icon

The screenshot shows the 'Activity Planner' interface with the 'Filters' dialog box open. The dialog lists various filters with columns for Name, Shared, Created On, and Created By. The filters listed are: Selenium_Filter, Selenium_Filter, Selenium_Filter, Test_GM_Template_Filter, Test_RunBook_Filter, Unassigned 2, and Unassigned. The 'Selenium_Filter' is highlighted, and the 'Pen' icon is visible next to it. The background shows the same calendar view as the previous screenshot.

- **Creating New Filters:** New filters can be created by selecting the 'Add Filter' button from the filters page. All mandatory fields must be completed, and rules can be added if required. The filter can be made as 'Shared' which means all users on the system have access to the filter. If the 'Shared' checkbox is not select only the user that created the filter will have access to use it.

The screenshot displays the 'Filter' dialog box in the GeoPal application. The dialog is titled 'Filter' and has a close button in the top right corner. It contains the following fields and options:

- Name:** A text field with the placeholder 'Example Filter'.
- Share Filter:** A checkbox that is checked, with a red arrow pointing to it.
- Filters:** A section with four rows of dropdown menus:
 - Row 1: Job Template (selected: 'Andy's Test, Arte Testing 001 - R'), Team, Assigned To, Company.
 - Row 2: Job Status, Site, Asset Type, Project.
- Logic:** A section with two buttons: 'AND' (selected) and 'OR'.
- Rule:** A section with three dropdown menus: 'List (Andy's Test)', 'Equal To', and 'Cable'. A red arrow points to the 'Add Rule' button next to these.
- Buttons:** 'Add Rule' and 'Add Group' buttons are located to the right of the rule dropdowns. At the bottom right are 'Cancel' and 'Save' buttons.

The background shows a sidebar with a list of resources including 'Depots' (Andy's Test, Bourneham, Crownhill, Exewater, Gallows, GM Team, Mark Test, Sample De) and 'Tests' (Test 1, Test 2, Test 3, Test 4). The main area shows a table with columns for 'Job No.', 'Status', and 'Priority'.