Administration

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ADMIN CENTER

DEFINITION

ADMIN CENTER is the application for the management of VISUAL PLANNING administration.

ADMIN CENTER only runs on a network server with VISUAL PLANNING ESSENTIAL or ENTERPRISE. Indeed, VISUAL PLANNING ONE is dedicated to only one user.

This application lets:

- The management of the Licenses,
- The management of the Users,
- The management of the Groups,
- The management of the Planners and their Permissions,
- The management of the Services,
- The management of the Modules.

Only the main administrator or a local planner administrator can access this functionality.

It is possible for a given planner to directly access to some functionalities of the ADMIN CENTER application from VISUAL PLANNING.

ACCESS

Launch the ADMIN CENTER application

To launch ADMIN CENTER, open the Intranet/Internet browser.

Then, enter the address that has the following form:

http://servername/vplanning/

On the Visual Planning web page, select ADMIN CENTER link:
An identification window will appear:

To access the Admin Center you will need to provide:

- The **login**,  
- The **password**,  
- And click on the **OK** button.

cf. [Management of the Users](https://www.visual-planning.com/doc/en/8-administration/admin_center)

ADMIN CENTER window will appear:
In this application you will have access to all of the administration functionalities:

- Management of the Licenses,
- Management of the Users,
- Management of the Groups (for ENTERPRISE version),
- Management of the Planners,
- Management of the Permissions (for ENTERPRISE version),
- Management of the Services (for ENTERPRISE version),
- Management of the Modules (for ENTERPRISE version).

**Administrator Tools**

The **Administrator Tools** menu contains different functionalities:
General settings

General settings allows to define values of parameters of the VISUAL PLANNING server:

Clients verbose log

Enabling this option will set the clients log to verbose mode.
Deny access to 'activation'

Enabling this option will deny the access to the licenses activation page.

Deny access to the 'logs'

Enabling this option will deny the access to the server logs page.

Desktop Shortcuts

Enabling this option will create a VISUAL PLANNING shortcut on the desktop.

Language server

This field allows to define the language of the VISUAL PLANNING server. If no language is selected, VISUAL PLANNING will use the application server language.

Refresh delay

This field allows to define the refresh delay on the client version (in minutes). If the value is set to -1, the delay can be defined on every client version individually.

Verbose log

Enabling this option will set the log to verbose mode.

Application name

This is the name of the application that will be displayed under the client button on the VISUAL PLANNING web page.

Description
This field allows to customize the home page of VISUAL PLANNING using HTML.

**Icon**

This field allows to change the icon of the client button on the VISUAL PLANNING web page.

**Show icon 'Admin Center'**

Disabling this option will hide the 'Admin Center' icon on the VISUAL PLANNING web page.

**Title**

This field allows to customize the title of the home page of VISUAL PLANNING. If nothing is set - the title will be "VISUAL PLANNING" and name of the version "Essential" or "Enterprise".

**Description**

This field allows to customize the header of the VPPortal home page using simple text or HTML.

**Force Schedule**

This field allows to define a default VPPortal planner. When a value is set - users will only have access to the selected planner.

**Skin**

This drop down list allows to customize the GUI of the module.

**Title**

This field allows to customize the title of the home page of the module.
Setting Password

It is possible to define a password policy in Visual Planning. To do this, click Setting Password. The options are:

- Minimum number of characters,
- At least one uppercase,
- At least one special character,
- At least one digit,
- Prohibit the last 3 passwords,
- Number of days of validity password,
- Blocking the account after 3 failed attempts,
- Send an email to a responsible if a block has been done.

These options can be defined in the following window:

LDAPAdmin

It is possible to connect ADMIN CENTER with a Lightweight Directory Access Protocol (LDAP). To do this, select Setting LDAP and fill in the following window:
**External access settings**

VISUAL PLANNING allows access to FTP, HTTP or WEBDAV servers. To do this, click on **External access settings** button.

The following window will appear:
Fill in:

- The URL of the FTP server, the Host or the WEBDAV server,
- The connection settings (login and password).

VISUAL PLANNING will compare each URL declared in the planner with the URL declared in the External access settings and will use those access codes.

**Database Request**

It is possible to access to the data of the planners from ADMIN CENTER. To do this, select **Database Request** button. The following window will appear:
Caution:

It is absolutely forbidden to use queries except **SELECT**.

Any change in database involves the loss of the maintenance contract.

We strongly recommend to contact the Support of STILOG I.S.T. whether manipulations of this type are needed.

- **Email**: support[at]stilog[.]com

**Show server 'statistics'**

It is possible to access to the statistics of the server. To do this, select **Show server 'statistics'** button.

The following window will appear:
• **File**: allows to choose the log file. Generally, it corresponds to a day,
• **Time period**: allows to choose the time slot of the day you want to analyse,
• **Data**: allows to choose the type of data you want to analyse.

### Show server 'logs'

This functionality allows to show the list of the logs of the server.

### Manage the users

The users of one or several planners can be created, modified or deleted.

Each user has his own login and password.

The uppercase and lowercase are differentiated.

An email can be sent to an user. To do so, **right-click > Send mail** on the user's line.

### The "Admin" user

The **admin** user is the administrator of the application.
This login admin should not be used for a purpose other than the administration and configuration of the application.

It should not be deleted.

As a matter of security, define a password to this login.

cf. Management of the users

Manage the licenses

ADMIN CENTER allows to define the users that can launch VISUAL PLANNING, and assign them to the licenses.

VISUAL PLANNING has several types of user licenses (for example: floating or named), so the right assignment can determine a first level of the functional rights for each user.

An email can be sent to all the users of a license. To do so, right-click > Send mail on the license's line.

cf. Management of the licenses

Manage the groups

ADMIN CENTER allows to define the groups of users that have the same rights on a given planner.

It is possible to send an email to all the users of a group. To do so, right-click > Send mail to a group's line.

cf. Management of the groups

Manage the planners

ADMIN CENTER allows main administrator to create, save, export, import or restore planners.

It is possible to send an email to all the users of a planner. To do so, right-click > Send mail to a planner's line.
Manage the permissions

ADMIN CENTER allows to define user rights on the planner in two steps:

- Allocate the authorized groups and/or users,
- Define the Permissions (in a thin mesh).

Once the protection set, the permissions can be done by the admin login or by the administrator(s) of the planner.

cf. Management of the permissions

Manage the services

ADMIN CENTER allows to decide if the VISUAL PLANNING services are started or stopped.

cf. Manage the services

Manage the modules

ADMIN CENTER allows to define configuration of modules.

It concerns the licenses and the administrators of the modules.

cf. Manage the modules

Timeout

ADMIN CENTER has an automatic disconnection in case of prolonged disuse.

The following message will appear:
The application will close immediately after selecting **OK** button.

administration, admin, center, service, license, module, user, group
Management of the users

DEFINITION

A **User** of VISUAL PLANNING is principally identified with his login and his password. These allow to access to one or more planners.

It is possible to define an unlimited number of users, but only those who are allocated to a license can access to VISUAL PLANNING.

So, the real number of users who can connect to the application is defined by the licenses purchased.

**Admin center** allows to manually create, modify, delete the users and allows to allocate them to the **licenses** and to the **groups**.

ADMINISTRATION

View the users

The users are visible in the **admin center** by clicking on the **Users** button:

The following window will appear:
Create a user

To create a new user, in the admin center, go to the users section by clicking on the Users button:

Then, right-click on a User > Add a user.

The following window will appear:
Fill in details of the user profile and click on the **OK** button.

User creation is also reachable from another entry point: Menu **Edition > Creation block > Add a user**.

The fields available in the user profile are:

**Login**

This field contains the login of the user.

This login must be unique.

**Activated**

This box is checked if the user is active.

If this box is unchecked, the user cannot access VISUAL PLANNING.

In the list of users, an icon is displayed on the left to show whether each user is currently active or inactive.

Example:
New password

Password information

A password is required to access VISUAL PLANNING.

When a new user is created or a user's password is reset, there will be no password upon first connection.

The password is a user's responsibility. When the user access VISUAL PLANNING for the first time, he will be able to connect by leaving the 'password' field blank and will be asked to select a new password.

Passwords are case-sensitive in VISUAL PLANNING.

To modify the password, on the Quick access bar, click on Preferences then Change password:

A following window will appear:
The user should fill the fields with the new password.

**New password information**

You can ask a user to change his password by checking this box.

In this case, at the next logon, the user must enter their old password, then a window will open asking for a new password:

**Full name**

This characteristic is optional and allows to precise the full name of the user.

**E-mail**

This characteristic is optional and allows to precise the e-mail of the user. This is required for manual
sending email from an event. (cf. Sending an e-mail from an event)

**Mobile phone**

This characteristic is optional and allows to precise the mobile phone of the user.

**Office phone**

This characteristic is optional and allows to precise the office phone of the user.

**Groups**

This characteristic is optional and allows to precise the groups of the user.

**Licenses**

It concerns the visualization and / or the modification of the license(s) of the user.

**Modify a user**

In the admin center, to modify a user, click on the **Users** button:

Then **right-click on the user > Modify** (or double-click on the user). (cf. **Create a user**)  

It is not possible to cancel the modification of a user.

**Delete a user**

In the admin center, to delete a user, click on the **Users** button:

Then **right-click on the user > Delete.**
It is not possible to cancel the deletion of a user.

Temporarily, a user can be inactivated. (cf. Activated).

**LDAP Authentification**

This function is designed for companies using a LDAP (Lightweight Directory Access Protocol) directory server, which contains the logins and the passwords of the whole users of computer applications.

If VISUAL PLANNING is connected to this directory, the authentication of the users on VISUAL PLANNING will be automatically made using this directory.

The VISUAL PLANNING users logins must be the same as the LDAP logins.

However, the passwords should not be created or modified in the ADMIN CENTER. They will be seized by the users when they connect to VISUAL PLANNING, and they will be automatically authenticated (or rejected) by the directory.

By choosing in the Planner menu > LDAP:

The following window will appear:
Then fill in the following characteristics:

**Activated**

This check box activate or inactivate the authentication of the users of VISUAL PLANNING with a LDAP protocol.

**Protocol**

Choose into the list the type of protocol:

- LDAP.
- Active Directory.

**Host**

It is the IP address or the name of the machine on which the LDAP server is.

It is also possible to precise the port and if the SSL protocol is used or not.
Root DN

It is the login on the chosen Domain Name.

Password

It is the password on the chosen Domain Name.

Base DN

It concerns the Domain Name where VISUAL PLANNING finds the users. This domain represents a subgroup into the hierarchy of the possible users.

OK

If the connection is established and if the option is activated, every user that connects on VISUAL PLANNING, if the login is recognized into the LDAP directory, defined in the ADMIN CENTER, will have his password identified by this directory, without any intervention of the administrator.

Import users

It is possible to import the users by using an external file.

Requirements

Case 1: *.TXT format. The column separator must be the tabulation (TAB) character and the first line containing the name of the columns is not required.

In order, the required columns are:

- Column 1: The user Full Name.

The optional columns are:

- Column 2: The Full name of the user.
- Column 3: The Email address.
- Column 4: The mobile phone number.
• Column 5: The phone number.

The password can not be imported.

Remark: **Repeated Importations**

If case of successive imports of users:

• The existing users will not be duplicated or modified.
• The non existing users will be created.
• The deletion of users is not managed by the importation, and must be manually done.

**Case 2**: *.CSV Format : You must have column NAME containing user logins and the following optional columns (separated by semicolons):

- FULLNAME: User complete name.
- PHONE: User telephone number.
- MOBILE: User cellphone.
- EMAIL: User mail.
- GROUPS: User groups (separated by commas).
- LICENSES: User licences Licences (separated by commas).

If the user still exist and his group is different in the import file this one will be modified in VISUAL PLANNING.

**Launch the import**

In the **admin center**, to modify a user, click on the **Users** button:

Then **Right-Click > Import users**.

Choose the *.TXT file to import, and click on **Open**.

**Connected users**

**List the connected users**
You can view a list of connected users on a given schedule.

To do this, in the ADMIN CENTER, click the button **Planners**:

Then **Right click on the planning > Show connected users.**

The following window will appear:

### Disconnect users

It is possible to disconnect the connected users.

To do this, in the ADMIN CENTER, click the button **Planners**:

Then **Right click on the planning > Disconnect users.**

The following window will appear:
It is possible to enter a message to the users before their disconnection.

**Block access**

It is possible to block the access to the non-administration users.

To do this, in the ADMIN CENTER, click the button **Planners**: 

Then **Right click on the planning > Modify**.

Check the box **Block access**, then click OK.

The following window will appear:
It is possible to enter a message to the users before their disconnection.

Example of disconnection message:
Visual Planning is down for maintenance. Please check back again soon.

c.f. Block access

Connection histories

It is possible to show the connection history.
To do this, in the ADMIN CENTER, click the button Planners:

Then, Right click on the planning > Connection history.
The following window will appear:

Then it is possible to define the start and the end of time period.
The start and end of the period are defined the same way.
It is possible to define time periods with:
- Relative Start and End.
- Fixed Start and End.
- Fixed Start and Relative End.
- Relative Start and Fixed End.

**Fixed Date**

In this case, it is necessary to specify a date and hour.

This date is independent of when the time period is used.

**Relative value**

In this case, it is necessary to define a date on when the time period is used.

Each rolling period is defined as:

- A **Relative value**: A number. The reference period is represented by the number 0.
- A **Relative unit**: Hour, Day, Week, Month...

Examples:

<table>
<thead>
<tr>
<th>Time periods</th>
<th>Current date (of the functionality date of use)</th>
<th>Signification</th>
</tr>
</thead>
<tbody>
<tr>
<td>The fixed date of</td>
<td>whatever the current date</td>
<td>always means the 21/01/2011</td>
</tr>
<tr>
<td>21/01/2011</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The relative value</td>
<td>at the date of 31/12/2011</td>
<td>means the 31/12/2011</td>
</tr>
<tr>
<td>1 day</td>
<td></td>
<td></td>
</tr>
<tr>
<td>The relative value</td>
<td>at the date of 02/01/2012</td>
<td>means the 02/01/2012</td>
</tr>
<tr>
<td>1 day</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

The information described the elements modified by the user. To appear, these items must not have been subsequent changed.

user, administration, ldap
Management of the groups

DEFINITION

A **Group** of users contains the users that have the same rights on a planner.

It is identified by:

- its name,
- an optional description,
- and a list of users.

To be used, the groups must be allocated to a planner.

**ADMIN CENTER** allows to create, modify, delete the groups, assign **users** to the groups and associate them to **planners**.

This feature requires VISUAL PLANNING ENTERPRISE.

ADMINISTRATION

View the groups

Groups are visible in the **ADMIN CENTER** by clicking on the **Groups** button:

Then, the list of groups appears, with their descriptions and their planners:
Create a group

In the **ADMIN CENTER**, the creation of a group is reachable by clicking on the **Groups** button:

Then, **right-click on a group > Add a group.**

A following window will appear:

Precise the characteristics of the group and click on the **OK** button.

It is possible to create groups consecutively. For this, click the **Apply** button.

It is also reachable from another entry point: Menu **Edition > Creation block > Add a group.**
The characteristics of a group are:

**Name**

Enter the name of the group in this field. Each group must have a unique name. If the name is used yet, a message appears.

**Description**

Enter an optional description which will appear on the list of existing group.

**Users**

It concerns the visualization and/or modification of the users of the group.

**Right-Click on the right button.**

A properties window of the users will appear:

In this window, **drag&drop the users from the left to the right** via the arrows:
It is also possible to see the group(s) of the users in the Management of the users.

The groups are also visible, in the planners list. If the planner owns a large number of groups, placing the mouse on the groups will show the tool tip with all groups.

**Send a mail**

This option is available only if the SMTP server is set up.

**Right-click** on a group name > **Send mail**.

This option allows to send an email to all the users of a group.

**Modify a group**

In the ADMIN CENTER, to modify a group, click on the **Groups** button:

Then, **right-click on the group**  > **Modify** (or double-click on the group). (cf. Create a group)

It is not possible to cancel the modification of a group.

**Delete a group**

In the ADMIN CENTER, to delete a group, click on the **Groups** button:

Then, **right-click on the group** > **Delete**.

It is not possible to cancel the deletion of a user.

**group, user, administration**
Management of the planners

DEFINITION

For VISUAL PLANNING, each planner is a database.

To manage these planners, it is possible:

- To create,
- To import,
- To restore,
- To export,
- To delete.

All these functionalities are available for the main administrator of VISUAL PLANNING:

- In a ONE version: accessible from VISUAL PLANNING.
- In a ESSENTIAL or ENTERPRISE version: accessible from the admin center.

ADMINISTRATION

VISUAL PLANNING ONE

cf. Management of the planners on VP ONE

VISUAL PLANNING ESSENTIAL

cf. Management of the planners on VP ESSENTIAL

VISUAL PLANNING ENTREPRISE

cf. Management of the planners on VP ENTERPRISE
Management of the planners on VP ONE

DEFINITION

For VISUAL PLANNING ONE, each planner is a database.

To manage these planners, it is possible:

- to create,
- to import,
- to restore,
- to export,
- to delete.

ADMINISTRATION

View the planners

The planners are visible in the Planner Block in the Planner Menu by clicking on the Open button.

Create a planner

In this version, every user can create a new planner.

cf. Create a new planner

Import a planner

The planner import allows to create a new planner, a new database using a *.VPS file.

To import a planner, go to the Planners menu > Import block > Import a planner.
A following window will appear:

![Import a planner]

Then:

- Search for the planner which has the form *.VPS,
- Select it,
- and click on **Open**.

A following window will appear:
Give:

- A **Name** for the new planner,
- A **Description** for this planner,
- and click on the **OK** button.

If a planner that has the same name already exists, the following window will appear:

To replace the existing planner, click on “**Yes**”. Otherwise, click on “**No**”.

**Export a planner**

To **export a planner**, go to the **Planner Menu > Export block > Export the planner**:
There are two possibilities:

- Export into a file,
- Export as model.

**Export into a file**

It allows to export a backup copy of the planner. It is a *.VPS file.

This file contains the entire planner.

A following window will appear:

![Save dialog box](image)

Then:

- define the **path** where the *.VPS file will be register,
- choose a **Name**, and
- click on the **OK** button.
Export as model

It allows to create a **planner as a model**. This model will be used as a pattern for a new planner.

A following window will appear:

![Export a planner](image)

Then precise:

- A **Name**,
- A **Description**,
- And click on the **OK** button.

This model is visible when **creating a new planner**.

Delete a planner

**Warning:**

Deleting a planner should be approached with extreme caution.

Every planner deletion is irreversible and destroy:

- all data (Resources, Events...),
- the settings that were done.

It is strongly recommended to check carefully that this is a planner that can be deleted!
Preliminary, it is advisable to make a backup copy of the planner. (cf. Export a planner)

In this version, to delete a planner, Click on Planner > Block Planner > Delete.

restore, export, import, planner, file, vps
Management of the planners on VP ESSENTIAL

DEFINITION

For VISUAL PLANNING, each planner is a database.

To manage these planners, it is possible:

- To create.
- To import.
- To restore.
- To export.
- To delete.

All these functionalities are available for the main administrator of VISUAL PLANNING:

- In a ONE version: accessible from VISUAL PLANNING.
- In a ESSENTIAL or ENTERPRISE version: accessible from the ADMIN CENTER.

ADMINISTRATION

View the planners

The planners are visible in the ADMIN CENTER by clicking on the Planners button:

The following window will appear:
Create a planner

Only the main administrator of VISUAL PLANNING can create a new planner.

cf. Create a new planner

Modify a planner

The modification of a planner usually concerns its settings.

In the ADMIN CENTER, the modification of a planner concerns:

- The allocation of the users.
- The administrators of the planner.

This allocation is accessible by clicking on the Planners button:

Then right-click on the planner > Modify.

The following window will appear:
Then it is possible to modify its properties and validate by clicking on the OK button.

**Name**

It concerns the name of the planner, given when creating.

This name is unique for each planning.

**Description**

It is an optional description of the planner.

**Block Access**

Checking this check box causes the disconnection of all users of the planning.
cf. Connected users

After the disconnection, the only global administrator and planner administrators can reconnect.

**Activate 'Import/export'**

It is necessary to check this box in case of import and / or export by service.

cf. Export using service and Import using service

**Activate 'Send mail'**

It is necessary to check this box to enable automatic sending mails from one or more events.

cf. Automatic sending of e-mails

**Enable URL backup**

It is necessary to check this box to enable the export of the planner via an URL. To display the URL, cf. view url backup.

**Version**

It concerns the version of the planner structure in the database.

This number may be asked by the Support of STILOG I.S.T. in case of maintenance.

**Delete a planner**

**Warning:**

Deleting a planner should be approached with extreme caution.

Every planner deletion is irreversible and destroy:

- All data (Resources, Events...).
- The settings that were done.
• The existing permissions.

It is strongly recommended to check carefully that this is a planner that can be deleted!

Preliminary, it is advisable to make a backup copy of the planner. (cf. Export a planner)

To delete a planner, **Right-Click on the planner > Delete.**

The following window will appear:

![Question window](image)

• To confirm, click on **Yes**.
• To cancel, click on **No**.

**Export a planner**

To **export a planner**, go to the Planner Menu > Export block > Export the planner:

![Export options](image)

There are two possibilities:

• Export into a file.
• Export as model.

**Export into a file**

It allows to export a backup copy of the planner. It is a *.VPS file.

This file contains the entire planner, its groups and their permissions.

The following window will appear:
Then:

- Define the **path** where the *.VPS file will be register.
- Choose a **Name** (it can be useful to precise the export hour and date).
- Click on the **OK** button.

**Export as model**

It allows to create a **planner as a model**. This model will be used as a pattern for a new planner.

The following window will appear:
Management of the planners on VP ESSENTIAL VISUAL PLANNING 5.3 DOCUMENTATION - https://www.visual-planning.com/doc/

Then:

- Define the **Name**.
- Define the **Description**.
- Click on the **OK** button.

This model is visible when creating a new planner.

**Import a planner**

The planner import allows to create a new planner, a new database using a *.VPS* file.

To import a planner, go to the **Planners menu > Import block > Import a planner**:

The following window will appear:
Then:

- Search for the planner which has the form *.VPS.
- Select it.
- Click on **Open**.

The following window will appear:
• Define the **Name** for the new planner.
• Define the **Description** for this planner.
• Click on the **OK** button.

If a planner that has the same name already exists, the following window will appear:

To replace the existing planner, click on “**Yes**”. Otherwise, click on “**No**”.

**Restore a planner**

Restoring a planner allows to overwrite the existing planner by another *.VPS planner with the same name.

To restore a planner, **right-click on the planner to overwrite > Restore**:

The following window will appear:
Then:

- Search for the planner which has the form *.VPS.
- Select it.
- Click on **Open**.

The import can last a few minutes. During the import, the following window will appear:

**View URL backup**

This functionality is enabled only if the activation of the URL was checked. (cf. Enable url backup)
When clicking, the export URL of the planner is displayed:

Copy/Paste this URL in a web browser or in the functionality that will use this URL to launch the export of the planner.

The file will have the following form: “Name_of_the_planner_yyyymmdd_hhmm.vps”.

Connection histories

It is possible to show the connection histories.

To do this, in the ADMIN CENTER, click the button Plannings:

Then, Right click on the planning > Connection histories.

The following window will appear:
Then, it is possible to define the start and the end of time period.

The start and end of the period are defined the same way.

It is possible to define time periods with:

- Relative Start and End.
- Fixed Start and End.
- Fixed Start and Relative End.
- Relative Start and Fixed End.

**Fixed Date**

In this case, it is necessary to specify a date and hour.

This date is independent of when the time period is used.

**Relative value**

In this case, it is necessary to define a date on when the time period is used.

Each rolling period is defined as:

- A **Relative value** : A number. The reference period is represented by the number 0.
- A **Relative unit** : Hour, Day, Week, Month...

Examples:
The information described the elements modified by the user. To appear, these items must not have been subsequent changed.

restore, export, import, planner, file, vps
Management of the planners on VP ENTERPRISE

DEFINITION

For VISUAL PLANNING, each planner is a database.

To manage these planners, it is possible:

- To create,
- To import,
- To restore,
- To export,
- To delete.

ADMINISTRATION

View the planners

The planners are visible in the admin center by clicking on the Planners button:

Then, the list of the planners appears:
Create a planner

Only the main administrator of VISUAL PLANNING can create a new planner.

cf. Create a new planner

Modify a planner

The modification of a planner usually concerns its settings.

In the admin center, the modification of a planner concerns:

- The allocation of the users.
- The administrators of the planner.

This allocation is accessible by clicking on the Planners button:

Then, right-click on the planner > Modify.

The following window will appear:
Then, it is possible to modify its properties and validate by clicking on the **Validate** button.

### Name

It concerns the name of the planner, given when creating.

This name is unique for each planning.

### Description

It is an optional description of the planner.

### Enable 'SmartToolbar'

Checking this box replaces the **Menu Bar** in VISUAL PLANNING by the “SmartToolbar”.

---

**VISUAL PLANNING 5.3 DOCUMENTATION** - [https://www.visual-planning.com/doc/](https://www.visual-planning.com/doc/)
Enable deletion of historical

Checking this box allows to automatically delete the history of the entities that were deleted for 60 days.

Restore date

It concerns the last restore date of the planner.

Access to private data

Checking this box allows the “admin” user to access to the private datas.

Version

It concerns the version of the planner structure in the database.

This number may be asked by the Support of STILOG I.S.T. in case of maintenance.

Administrators users

It concerns the definition of the list of the users that have administrators rights on the planner.

Users/Groups permitted

It concerns the definition of the list of the groups and/or the users that have access to the planner (read-only/ modification).

Block Access

Ticking this box causes the disconnection of all users of the planning.

cf. Connected users
After the disconnection, the only global administrator and administrators planning can reconnect.

**Protection activated**

This box is checked if the permissions of the planner are activated. (cf. *Management of the permissions*)

The activated/inactivated notion for the planner can be seen, among the list of planners, with the icon in the left of the planner.

Example:

<table>
<thead>
<tr>
<th>Protected Planner</th>
<th>![Planner 1]</th>
</tr>
</thead>
<tbody>
<tr>
<td>Unprotected Planner</td>
<td>![Planner 1]</td>
</tr>
</tbody>
</table>

**Activate 'Import/export'**

It is necessary to check this box in case of import and / or export by service.

cf. *Export using service* and *Import using service*

**Activate 'Send mail'**

It is necessary to check this box to enable automatic sending mails from one or more events.

cf. *Automatic sending of e-mails*

**Enable automatic backup**

It is necessary to check this box to enable automatic backup of a planner.

cf. *Automatic backup service*

**Enable URL backup**

It is necessary to check this box to enable the export of the planner via an URL. To display the URL, cf. *view url backup*. 
Delete a planner

Warning:
Deleting a planner should be approached with extreme caution.
Every planner deletion is irreversible and will erase:

- All data (Resources, Events...).
- The settings that were done.
- The existing permissions.

It is strongly recommended to check carefully that this is a planner that can be deleted!

Preliminary, it is advisable to make a backup copy of the planner. (cf. Export a planner)

To delete a planner, Right-Click on the planner > Delete.

The following message will appear:

- To confirm, click on Yes.
- To cancel, click on No.

Export a planner

To export a planner, there are two possibilities:

- Click on the Planner > go to the Planner Menu > Export block > Export the planner:

- Right click on the Planner > Export planner:
Then, there are two possibilities:

- Export into a file.
- Export as model.

**Export into a file**

It allows to export a backup copy of the planner. It is a *.VPS file.

This file contains the entire planner, its groups and their permissions.

The following window will appear:

Then:

- Define the path where the *.VPS file will be register.
• Choose a **Name**.
• Click on the **OK** button.

**Export as model**

It allows to create a **planner as a model**. This model will be used as a pattern for a new planner.

The following window will appear:

![Export a planner](image)

Then:

• Precise the **Name**.
• Precise the **Description**.
• Click on the **OK** button.

This model is visible when **creating a new planner**.

**Import a planner**

The planner import allows to create a new planner, a new database using a *.VPS* file.

To import a planner, go to the **Planners menu > Import a planner**:
The following window will appear:

```
Open

Look In:  Documents

File Name:  
Files of Type:  Planning Archive (*.vpe)

Open  Cancel
```

Then:

- Search for the planner which has the form *.VPS.
- Select it.
- Click on Open.

The following window will appear:
Then:

- Precise the **Name** for the new planner.
- Precise the **Description** for this planner.
- Click on the **OK** button.

If a planner that has the same name already exists, the following window appears:

To replace the existing planner, click on “**Yes**”. Otherwise, click on “**No**”.

### Restore a planner

Restoring a planner allows to overwrite the existing planner by another *.VPS planner with the same name.
To restore a planner, **right-click on the planner to overwrite > Restore from a backup file** or **Restore an automatic backup**.

![Image of restore options](https://www.visual-planning.com/doc/)

**Restore from a backup file**

The window which allows you to choose the file to restore is then opened:

![Image of file selection window](https://www.visual-planning.com/doc/)

Then:

- Search for the planner which has the form *.VPS.
- Select it.
- And click on **Open**.

The import can last a few minutes. During the import, the following window appears:
Restore from an automatic backup

The choice of the date of backup window opens.

Select the date and click **OK** to start the restoration.

**View URL backup**

This functionality is enabled only if the activation of the URL was checked. (cf. [Enable url backup](https://www.visual-planning.com/doc/en/8-administration/gestion_des_plannings_entreprise))

When clicking, the export URL of the planner is displayed.

Copy/Paste this URL in a web browser or in the functionality that will use this URL to launch the export of the planner.

The file will have the following form: **“Name_of_the_planner_yyyymmdd_hhmm.vps”**.
**Disconnect users**

It is possible to disconnect all the users of a planner.

cf. [Disconnect users](https://www.visual-planning.com/doc/)

**Show connected users**

It is possible to see all the users that are connected on the planner.

cf. [Connected users](https://www.visual-planning.com/doc/)

**Connection histories**

It is possible to show the connection history.

To do this, in the ADMIN CENTER, click the button **Plannings**:

![Plannings button](https://www.visual-planning.com/doc/)

Then, **Right click on the planning > Connection history**.

There are two possibilities to display the connection history.

- **Table mode:**
Tree mode. To display the tree mode, click the button : 

Then, it is possible to define the start and the end of time period.

It is possible to define time periods with:

- Relative Start and End.
- Fixed Start and End.
- Fixed Start and Relative End.
- Relative Start and Fixed End.
Fixed Date

In this case, it is necessary to specify a date and hour.

This date is independent of when the time period is used.

Relative value

In this case, it is necessary to define a date on when the time period is used.

Each rolling period is defined as:

- A **Relative value**: A number. The reference period is represented by the number 0.
- A **Relative unit**: Hour, Day, Week, Month...

Examples:

<table>
<thead>
<tr>
<th>Time periods</th>
<th>Current date (of the functionality date of use)</th>
<th>Signification</th>
</tr>
</thead>
<tbody>
<tr>
<td>The <strong>fixed date</strong> of 21/01/2011</td>
<td>whatever the current date</td>
<td>always means the 21/01/2011</td>
</tr>
<tr>
<td>The <strong>relative value 1 day</strong></td>
<td>at the date of 31/12/2011</td>
<td>means the 31/12/2011</td>
</tr>
<tr>
<td>The <strong>relative value 1 day</strong></td>
<td>at the date of 02/01/2012</td>
<td>means the 02/01/2012</td>
</tr>
</tbody>
</table>

The information described the elements modified by the user. To appear, these items must not have been subsequent changed.

Send mail

**Warning**: This option is reachable only if the SMTP server is set up.

This option allows to send a mail to all the users of the planner.

*restore, export, import, planner, file, vps*
Management of the permissions

**DEFINITION**

The Management of the Permissions allows to protect each planner and to limit the rights of some users groups.

The definition of the rights of a planner is done in two steps:

1. **Allocate groups and/or users** that are authorized,
2. Define the permissions of visualization and modification on the planner.

Then, define in the ADMIN CENTER the rights for each group on the planner.

This feature requires VISUAL PLANNING ENTERPRISE

**ADMINISTRATION**

**View the permissions of the planner**

The permissions of a planner are accessible from the ADMIN CENTER,

by clicking on the Planners button: 

Then, **Right-Click on the planner > Edit permissions**

The Permissions window is then opened:

In this window, the existing permissions are easily visible with a left click on each permission.

In addition, it is possible to quickly view the permissions of only one group by selecting it in the list of the authorized groups.
Exemple:

Selecting the group *Group 1* in this list allows to only view the permissions of the *Group 1*.

**Create a permission**

The creation of a permission is done in the **ADMIN CENTER**, 

by clicking on the **Planners** button:

Then, **Right-Click on the planner > Edit permissions**

The Permissions window is then opened:

Select the group which will have the permission in the following list:

Exemple:

Select the group *Group 1* in this list will allow to create a permission for the *Group 1* only.

Then, select the entity on which the permission will be created via the button:
It is also possible to create a permission by a **Right-Click on the entity > Add > ... Permission**

![Permission creation screenshot]

According to the selected entity, it is possible to create different types of permissions:

- Visualization permission,
- Creation permission,
- Modification permission,
- Deletion permission.
- Permissions “read only”

The right part of the window is then opened. The characteristics of the permissions will be precised:

- according to its type,
- and its entity.

cf. **Types of permissions**

**Modify a permission**

cf. **Create a permission**

**Delete a permission**

The deletion of a permission is done in the **ADMIN CENTER**, by clicking on the **Planners** button:

Then, **Right-Click on the planner > Edit permissions**

The Permissions window is the opened:
Select the permission to delete, and:

- Click on the button ❌
- Or Right-Click > Delete: ❌

The permission is deleted for all the groups using this one.

A deletion of a permission can not be cancelled.

**Activate permissions**

All the permissions can be activated or not.

cf. Activation des permissions

**TYPES OF PERMISSIONS**

There are four types of permissions:

- Visualization
- Creation
- Modification
- Deletion

The entities/functionalities on which permissions can be defined are:

Click on the ✔ symbol to directly access to the functionality

<table>
<thead>
<tr>
<th></th>
<th>Visualization</th>
<th>Creation</th>
<th>Modification</th>
<th>Deletion</th>
</tr>
</thead>
<tbody>
<tr>
<td>Dimensions</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Resources</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Forms</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Period types</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Hourly calendars models</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Hourly calendars</td>
<td>✔️</td>
<td></td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Daily calendars models</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Daily calendars</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td></td>
</tr>
<tr>
<td>Events</td>
<td></td>
<td></td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Valuation items</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Events filters</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Resources filters</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Target constraints</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
<tr>
<td>Coherency constraints</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
<td>✔️</td>
</tr>
</tbody>
</table>
The permission “read only” allows to forbid all the rights for all the groups. This type of permission is called “Forbidden to xxx”

Permissions on the Dimensions

To know more about the dimensions: cf. Dimensions

Creation of the Dimensions

The characteristics of this permission are:
Name

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

Description

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particulary useful when there are many permissions of the same type).

Groups

It is the list of the groups that have this permission.

Forbid

This checkbox allows, if checked, to forbid the creation of all the dimensions.

Deletion

It is the definition of the groups that have the permission of deletion on the dimensions that were created.

The groups can be:

- **All**: all the groups that can modify the dimensions can delete the dimensions that were created.
- **Creators groups**: only the groups which have the rights to create those dimensions can delete the dimensions.
- **Permission groups**: only the groups which have the permissions can delete the dimension.

Modification

It is the definition of the groups that have the permission of modification on the dimensions that were created.

The groups can be:

- **All**: all the groups that can modify the dimensions can delete the dimensions that were created.
• **Creators groups**: only the groups which have the rights to create those dimensions can delete the dimensions.

• **Permission groups**: only the groups which have the permissions can delete the dimension.

**Modification of the Dimensions**

![Modification permission](image)

The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).
Groups

It is the definition of the groups that have this permission.

Apply to data

It is the dimensions that can be modified with this permission.

Deletion of the Dimensions

A Deletion permission allows to delete one or several dimensions.

Name

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.
Description

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particulary useful when there are many permissions of the same type).

Groups

It is the definition of the groups which have this permission.

Apply to data

It allows to define the dimensions that can be deleted.

Permissions on the Resources

To know more about the resources: cf. Resources

Visualization of the Resources

When creating this permission, select the Dimension of the resources.

Define a Visualization permission for each dimension.
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**All headings**

This checkbox makes all the headings of the dimension visible.
Apply to headings

If the previous box is unchecked, define which headings of the dimension are visible.

Groups

Define the groups that have this permission.

Input condition

Define the resources that are visible with this permission.

To do so:

- Select a Resources filter that exists in the list
- Create a new customized Resources filter of the dimension for this permission.

Creation of the Resources

When creating the permission, select the dimension of the resources.

If necessary, define a Creation permission for each dimension.
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**All headings**

This checkbox allows to precise that it is possible to create all the headings of the resources.
Apply to headings

If the previous box is unchecked, define which headings can be seize when creating resources.

Mandatory heading

It define which headings has to be necessarily seize when creating resources.

All settings

The settings of the resources are:

- the hourly calendar
- the daily calendar
- the icon
- the color
- the events creation rule

This checkbox allows to precise if it is possible to seize all these resources parameters.

Apply settings

If the previous box is unchecked, define the parameters to seize when creating resources.

Groups

Define the groups that have this permission.

Forbid all

This checkbox forbids the creation of any resource of the dimensions.

In case of multi-group or multi-permissions: This option overrides other permissions.

This means that if it is checked, the prohibition wins over all others.
Output condition

Define the state in which the created resources must be after the creation.

To do so:

- either select an existing resources filter of the dimension into the list
- or create a new customized filter of the dimension for this permission.

If the creation does not respect the output condition, then, the creation is not made.

Modification of the Resources

When creating this permission, select the dimension of the resources.

It may be necessary to define a modification permission for each dimension.

The characteristics of this permission are:
Management of the permissions

Name

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

Description

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particulary useful when there are many permissions of the same type).

All headings

This checkbox allows to precise if it is possible to modify all the headings of the resources.

Apply to headings

If the previous box is unchecked, define which headings are modifiable on the resources that can be modified.

Mandatory heading

It define which modifiable headings has to be necessarily filled when resources are modified.

All settings

The parameters of the resources are:

- the hourly calendar
- the daily calendar
- the icon
- the colour
- the events creation rule

This checkbox allows to precise if it is possible to modify all these parameters.
If the previous box is unchecked, define which parameters are modifiable on the resources that can be modified.

**Groups**

Define the groups that have this permission.

**Forbid all**

This checkbox forbids the modification of all the resources of the dimension.

In case of multi-group or multi-permissions: This option overrides other permissions.

This means that if it is checked, the prohibition wins over all others.

**Input condition**

Define the state in which the resources must be before the modification.

To do so:

- either select an existing resources filter of the dimension into the list
- or create a new *customized* filter of the dimension for this permission.

**Output condition**

Define the state in which the resources must be after the modification.

To do so:

- either select an existing resources filter of the dimension into the list
- or create a new *customized* filter of the dimension for this permission.

If the modification respects the input condition but does not respect the output condition, then, the modification is not made.

**Deletion of the Resources**
A deletion permission allows to delete one or several entities.

![Deletion permission](image)

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particulary useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.
Forbid all

This checkbox allows to forbid any resources deletion for the defined groups.

In case of multi-group or multi-permissions: This option overrides other permissions.

This means that if it is checked, the prohibition wins over all others.

Input condition

If the previous box is checked, this characteristics allows to define with a filter the resources that can be deleted.

Permissions on the forms

The permissions of the forms are handled the same way as those of the dimensions.

cf. Permissions on the dimensions

To know more about the forms: cf. Forms

Permissions on the Period types

The permissions of the Period types are handled the same way as those of the dimensions.

cf. Permissions on the dimensions

To know more about the Period types: cf. Period Type

Permissions on the Hourly calendars models

The permissions on the Hourly calendars models are handled the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Hourly calendars models: cf. Hourly calendars models
Permissions on the Hourly calendars

The permissions on the Hourly calendars are handled the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Hourly calendars: cf. Hourly Calendar

Permissions on the Daily calendars models

The permissions on the Daily calendars models are handled the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Daily calendars models: cf. Daily calendars models

Permissions on the Daily calendars

The permissions on the Daily calendars are handled the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Daily calendars: cf. Daily calendars

Permissions on the Events

To know more about the events: cf. Events

Visualization of the events
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particulary useful when there are many permissions of the same type).

**All headings**

This checkbox allows to precise that all the headings of the forms are visible.
Apply to headings

If the previous box is unchecked, precise which forms headings are visible.

All items

This checkbox allows to precise that all the valuation items are visible.

Apply to valuations items

If the previous box is unchecked, precise which valuation items are visible.

Groups

Define the groups that have this permission.

Input condition

Define which resources are visible with this permission.

To do so:

- either select an existing events filter into the list
- or create a new **customized** events filter for this permission.

Creation of the Events
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**All attributes**

The attributes of the events are:
• the start date
• the end date
• the duration
• the load
• the type of load
• the achievement
• the automatic achievement
• the note
• the event type
• the working notion

This checkbox precises if it is possible to seize all these attributes when creating events.

Apply to

If the previous box is unchecked, precise which attributes may be seized when creating events.

All headings

This checkbox authorises to seize all the headings of the forms when creating events.

Allow change

This checkbox defines if the form can be changed or not when creating events.

Apply to headings

If the All headings box is unchecked, define which headings of the forms may be seized when creating events.

All dimensions

This checkbox authorises to seize all the resources of the events when creating events.

Apply dimensions

If the previous box is unchecked, define which resources can be seized when creating events.
**All items**

This checkbox authorises to seize all the valuation items when creating events.

**Allow change**

This checkbox defines if the valuation item (adding, deleting a valuation item) is authorised or not for this permission.

**Apply to valuations items**

If the **All items** box is unchecked, define which valuation items may be seized for the events.

**Groups**

This is the list of the groups that have this permission assigned.

**Forbid all**

If checked, this box forbids the events creation.

In case of multi-group or multi-permissions: This option overrides other permissions. This means that if it is checked, the prohibition wins over all others.

**Output condition**

Define the state in which the created events must be after the creation.

To do so:

- either select an existing events filter into the list
- or create a new customized events filter for this permission.
If the creation does not respect the output condition, then, the creation is not made.

**Modification of the Events**

The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particulary useful when there are many permissions of the same type).
All attributes

The attributes of the events are:

- the start date
- the end date
- the duration
- the load
- the type of load
- the achievement
- the automatic achievement
- the note
- the type of event
- the working notion

If checked, this box permits the modification of all these attributes.

Apply to

If the previous box is unchecked, define which attributes are modifiable on the events that can be modified.

All headings

This checkbox allows the modification of all the headings of the forms.

Allow change

This checkbox allows to define if the form can be changed or not in this permission.

Apply to headings

If the All headings box is unchecked, define which headings of the forms can be modified.

All dimensions
This checkbox allows the modification of all the resources of the events.

**Apply dimensions**

If the previous box is unchecked, define which dimensions are modifiable on the events that can be modified.

**All items**

This checkbox authorises the modification or not of all the valuation items.

**Allow change**

This checkbox allows to define if the valuation item (adding, deleting a valuation item) may be changed or not in this permission.

**Apply to valuations items**

If the **All items** box is unchecked, define which valuation items can be modified for the events.

**Groups**

Define which groups have this permission.

**Forbid all**

This checkbox forbids all the modifications for all the events.

In case of multi-group or multi-permissions: This option overrides other permissions.

This means that if it is checked, the prohibition wins over all others.

**Input condition**
Define which events can be modified for this permission.

To do so:

- either select an existing events filter into the list
- or create a new customized events filter for this permission.

**Output condition**

Define the final state in which the modified events must be after the modification.

To do so:

- either select an existing events filter into the list
- or create a new customized events filter for this permission.

**Deletion of the events**
A deletion permission allows to delete one or several entities.

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Forbid all**

This checkbox forbids any deletion of events for the groups of the permission.

In case of multi-group or multi-permissions: This option overrides other permissions.

This means that if it is checked, the prohibition wins over all others.

**Input condition**

If the previous box is checked, it allows to define with an events filter which events can be deleted.

**Permissions on the valuation items**

To know more about the valuation items: cf. Valuation items

**Visualization of the Valuation items**
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Apply to data**

Define the valuation items that are visible with this permission.

**Creation of the Valuation items**
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Forbid**

If checked, this box forbids the creation of all the valuation items.

**Allow only private**

If unchecked, this checkbox authorises only the creation of private valuation items.
Deletion

Define the groups that have a deletion permission on the valuation items that were created.

These groups can be:

- **All**: all the groups that have the rights to modify the valuation items can delete the valuation item that were created.
- **Creators groups**: only the groups that have the rights to create these valuation items can delete the valuation item that were created.
- **Permission groups**: only the groups that have the permission can delete the valuation item that were created.

Modification

Define the groups that have a modification permission on the valuation items that were created.

These groups can be:

- **All**: all the groups that have the rights to modify the valuation items can modify the valuation item that were created.
- **Creators groups**: only the groups that have the rights to create these valuation items can modify the valuation item that were created.
- **Permission groups**: only the groups that have the permission can modify the valuation item that were created.

Visualization

Define the groups that have a visualization permission on the valuation items that were created.

These groups can be:

- **All**: all the groups that have the rights to modify the valuation items can visualize the valuation item that were created.
- **Creators groups**: only the groups that have the rights to create these valuation items can visualize the valuation item that were created.
- **Permission groups**: only the groups that have the permission can visualize the valuation item that were created.

Modification of the Valuation items
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Apply to data**

Define the valuation items that are modifiable with this permission.

**Deletion of the Valuation items**
A deletion permission allows to delete one or several valuation items.

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.
Apply to data

It defines which valuation items can be deleted.

**Permissions on the Events filters**

The permissions on the events filters are managed the same way as those on the valuation items.

cf. [Permissions on the valuation items](#)

To know more about the events filters: cf. [Events filters](#)

**Permissions on the Resources filters**

The permissions on the resources filters are managed the same way as those on the valuation items. But before, choose the right dimension.

cf. [Permissions on the valuation items](#)

To know more about the resources filters: cf. [Resources filters](#)

**Permissions on the Target constraints**

The permissions on the Target constraints are managed the same way as those on the dimensions.

cf. [Permissions on the dimensions](#)

To know more about the target constraints: cf. [Target Constraints](#)

**Permissions on the Coherency constraints**

The permissions on the Coherency constraints are managed the same way as those on the dimensions.

cf. [Permissions on the dimensions](#)

To know more about the coherency constraints: cf. [Coherency Constraints](#)

**Permissions on the Events creation rule**
The permissions on the Events creation rule are managed the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Events creation rule: cf. Events creation rule

Permissions on the Events hierarchy

The permissions on the Events hierarchy are managed the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Events hierarchy: cf. Events hierarchies

Permissions on the Workloads

The permissions on the Workloads are managed the same way as those on the valuation items.

cf. Permissions on the valuation items

To know more about the Workloads: cf. Workloads

Permissions on the Events reports

The permissions on the Events reports are managed the same way as those on the valuation items.

cf. Permissions on the valuation items

To know more about the Events reports: cf. Events reports

Permissions on the Time period

The permissions on the Time period are managed the same way as those on the dimensions.

cf. Permissions on the dimensions

To know more about the Time period: cf. Time period

Permissions on the Favorite displays
The permissions on the Favorite displays are managed the same way as those on the valuation items.

cf. Permissions on the valuation items

To know more about the Favorite displays: cf. Favorite displays

**Permissions on the Predefined views**

The permissions on the Predefined views are managed the same way as those on the valuation items.

cf. Permissions on the valuation items

To know more about the Predefined views: cf. Predefined views

**Permissions on the Exports events**

To know more about the Exports events: cf. Export Events

**Visualization of the Exports events**

The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is
visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (it is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Apply to data**

Define the Exports events contexts that are visible with this permission.

**Creation of the Exports events**

The characteristics of this permission are:

**Name**
This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (it is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Forbid**

If checked, this box forbids the creation of all the Exports events contexts.

**Deletion**

Define the groups that have the deletion permission on the Exports events contexts that were created.

These groups can be:

- **All**: all the groups that have the rights to create the Exports events contexts can delete the Exports events contexts that were created.
- **Creators groups**: only the groups that have the rights to create the Exports events contexts can delete the Exports events contexts that were created.
- **Permission groups**: only the groups that have the permission can delete the Exports events contexts that were created.

**Modification**

Define the groups that have the modification permission on the Exports events contexts that were created.

These groups can be:

- **All**: all the groups that have the rights to create the Exports events contexts can modify the Exports events contexts that were created.
- **Creators groups**: only the groups that have the rights to create the Exports events contexts can modify the Exports events contexts that were created.
**Permission groups:** only the groups that have the permission can modify the Exports events contexts that were created.

**Visualization**

Define the groups that have the visualization permission on the Exports events contexts that were created.

These groups can be:

- **All:** all the groups that have the rights to create the Exports events contexts can visualize the Exports events contexts that were created.
- **Creators groups:** only the groups that have the rights to create the Exports events contexts can visualize the Exports events contexts that were created.
- **Permission groups:** only the groups that have the permission can visualize the Exports events contexts that were created.

**Modification of the Exports events**
The characteristics of this permission are:

**Name**

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

**Description**

It is an optional description of the permission. This description will appear in the tooltip of the permission (it is particularly useful when there are many permissions of the same type).

**Groups**

Define the groups that have this permission.

**Apply to data**

Define all the Exports events contexts that can be modified with this permission.

**Deletion of the Exports events**
A deletion permission allows to delete one or several Exports events contexts.

Name

This is the name of this permission. If checked, it replaces the default name of the permission and it is visible in the tree on the left.

Description

It is an optional description of the permission. This description will appear in the tooltip of the permission (It is particularly useful when there are many permissions of the same type).

Groups

Define which groups have the permissions.
Define which Exports events contexts can be deleted with this permission.

Permissions on the Exports resources

The Exports resources permissions are managed the same way as the Exports events permissions.

cf. Permissions on the Exports events

To know more about the Exports resources: cf. Export Resources

Permissions on the Imports events

The Imports events permissions are managed the same way as the Exports events permissions.

cf. Permissions on the Exports events

To know more about the Imports events: cf. Import Events

Permissions on the Imports resources

The Imports resources permissions are managed the same way as the Exports events permissions.

cf. Permissions on the Exports events

To know more about the Imports resources: cf. Import Resources

Permissions on the Chatrooms

Only Visualization permissions are provided.

The Chatrooms Visualization permissions are managed the same way as the Visualization permissions of the Valuation items.

cf. Permissions on the Valuation items

To know more about the Valuation items: cf. Valuation item

permission, planner, group, administration
Management of the licenses

DEFINITION

The Management of the Licenses enable the association of users to one of the subscribed licenses. The number of users associated to each license must respect the maximum number of users allowed for the license. When the maximum number of users allowed is reached, a warning message appears and it is no more possible to associate an additional user to the license.

Admin center lets the creation, modification, deletion of the licenses and the management of the users.

TYPES OF LICENSES

To obtain a description of the different types of licenses and their conditions of use, please directly contact STILOG I.S.T.

Contact STILOG I.S.T. :
- Mail : sales[at]stilog[.]com
- Tel : +33 1 47 29 99 69

ADMINISTRATION

View the licenses

The licenses are visible in the admin center by clicking on the Licenses button:
Then, the list of existing licenses will appear:

![Image of license list]

**Create a license**

The licenses are automatically installed during the installation.

In case of an addition of a new license, please, contact the technical service of STILOG I.S.T.

**Warning:**

Any modification of licenses may cause dysfunctions.

We strongly recommend to contact the Support of STILOG I.S.T. whether manipulations of this type are needed.

- Email: support[at]stilog[.]com

**Modify a license**

**Warning:**

Any modification of licenses may cause dysfunctions.

We strongly recommend to contact the Support of STILOG I.S.T. whether manipulations of this type are needed.

- Email: support[at]stilog[.]com
Only these following modifications are recommended:

- Add a description to a license.
- Allocate users to a license.

Any other modification is strongly inadvisable without the help of the Support of STILOG I.S.T.

**Add a description to a license**

It is recommended to add a description to each existing license in order to identify them correctly.

To do so, **Right-click on the license > Modify**.

The following window will appear:

![License window](image)

Then **Click on the button on the right of the description**.

The following window will appear:

![Properties edition window](image)

Enter a description and finally click on the **OK** button.
Allocate users to a license

To allocate users to a license, **Right-Click on the chosen license > Modify.**

The following window will appear:

![Assignments table]

Then, on **Users, Right-Click on the button on the right.**

The following window will appear:

![Properties edition window]

The information in the parenthesis following the login, is the property **Full name** of the user.

In this window, just **slide the users from the left to the right** via the arrows:

![Arrow buttons]

If the number of authorized users is overtaken, the arrows are no more inaccessible.

It is also possible to manage the allocation of the users to the licenses via the **management of the users.**
Update license

**Right click** on the license to update. A following window will appear:

![Image of a license update window]

Click on **Update license** and following window will appear:

![Image of a serial number window]

Enter your new license number in the “Serial number” field.

Click on **OK** to get the activation code via Internet or enter the code given by Stilog support team.

Updating a license involves an important change in the application's architecture.

*It is a powerful act of setting which should not be made without consideration.*

**Warning:** Updating a license is definitive.

Delete a license
To delete a license, contact the Support of STILOG I.S.T.

Deleting a license involves an important change in the application's architecture.

**Warning:** Deleting a license is definitive.
Management of the services

DEFINITION

The Management of the services allows to see, to start and to stop services of VISUAL PLANNING.

This functionality is only available in a VISUAL PLANNING ENTERPRISE version and is accessible via the ADMIN CENTER.

As standard, this only concerns the automatic resources or events imports and exports.

This feature requires VISUAL PLANNING ENTERPRISE

ADMINISTRATION

Visualization of the services

The access to the permissions is done in the ADMIN CENTER,

by clicking on the Services button:

![Services button]

Then, the list of the services appears:
A started service can be seen in the list of services with the icon in the left of the name of the service.

Example:

<table>
<thead>
<tr>
<th>Started service</th>
<th>Import/Export</th>
</tr>
</thead>
<tbody>
<tr>
<td>Stopped service</td>
<td>Import/Export</td>
</tr>
</tbody>
</table>

**Start service**

To start all the import and export services, go to the ADMIN CENTER.

Then **Click on the Services button > Right-Click on Import/Export > Start service.**

**Stop service**
To stop all the import and export services, go to ADMIN CENTER.

Then, **Click on the Services button > Right-Click on Import/Export > Stop service.**

**AUTOMATIC BACKUP SERVICE**

The backup service allows automatic daily backup of a planner in .VPS format.

For this, we must start the service and enable the backup for each planner. (cf. Management of the planners)

To change the characteristics of the backup, **right-click Backup > Edit.**

The following window will appear:

**Name**

This is the name of the service. It is not editable.
Description

Give a description to the service. This field is optional.

Automatic start

This box, if checked, automatically start the service at each restart of the application server VISUAL PLANNING.

Started

This box is checked if the service is started.

Backup directory

If no path is specified, the backup directory is the backup directory located in the installation directory of VISUAL PLANNING under webapps / vplanning.

This directory can be modified. To do this, type the path to the new directory. It must be accessible by the server.

Start hour

Set the backup start time.

Number of days archived

Set here the number of days to keep backups in the backup directory.
Sending mail

This box, if checked, allows you to send an email at the end of the backup.

The email will specify whether the backup was successful or not. In the event that a backup has not been made, the name of the planner for which the backup has not been performed correctly will be notified in the email.

The mail will be sent provided the SMTP settings automatic mail sending module are informed and correct.

Sender

Specify the email address of the sender.

Recipients

Specify the email address(es) or recipient(s), separated by semicolons.

SERVICE IMPORTS / EXPORTS

The import / export service allows to launch of imports and / or exports of automatic if such settings exist in schedules.

For it:

In the ADMIN CENTER, you must start the service, activate 'Import / Export' on the schedule (see Schedule management) and complete the parameters concerning services in the contexts imports and / or exports in the schedule (see Import Export Import and Export). To change the characteristics of the backup, right-click Import / Export> Edit.

The following window appears:
Name

This is the name of the service. It is not editable.

Description

Give a description to the service. This field is optional.

Auto-start

This box, if checked, to automatically start the service at each restart of the application server VISUAL PLANNING.

Started

This box is checked if the service is started.

SERVICE SENDING EMAILS

The service allows sending emails can send automated mails if such settings exist in schedules.
For it:

In the ADMIN CENTER, you must start the service, activate 'Send mail' on the schedule (see Schedule management) and complete the parameters concerning services in malls contexts in the schedule (see Mail). To change the characteristics of the backup, right-click Send mail > Edit.

The following window appears:

**Name**

This is the name of the service. It is not editable.

**Description**

Give a description to the service. This field is optional.

**Auto-start**

This box, if checked, to automatically start the service at each restart of the application server VISUAL PLANNING.

**Started**
This box is checked if the service is started.
Modules management

DEFINITION

Modules management allows to install modules licenses and to define their properties by the administrators.

This functionality is only compatible with VISUAL PLANNING ENTERPRISE from the admin center.

Existing modules are:

- CHATROOM (standard).
- GEOLOC (standard).
- ICAL (additional).
- MAIL (standard).
- RSS (standard).
- SMS (additional).
- VPPORTAL (additional).
- VP PUBLIPOST (standard).

This feature requires VISUAL PLANNING ENTERPRISE.

ADMINISTRATION

Modules display

Modules access is done via admin center, by clicking on Modules button:

The following window will appear:
Module installation

EMAIL SENDING, CHATROOMS, SMS, RSS, GEOLOCATION, PUBLIPOST are included modules. They do not require to be installed separately.

To install other modules, you must register the license.

For that purpose, **Right click on the module > Register license.**

The following window will appear:
Enter the serial number.

Activate the license:

- Either by Internet,
- Or by entering the number given by the technical support of VISUAL PLANNING.

To contact technical support: support@stilog.com

Then, click on **Confirm** button.

To see if a module is installed or not, verify the icon at the left side of the module name.

Example:

A non installed module  
An installed module

**Management of administrators**

A module can require parameters. Only administrators of the module are allowed to do these actions.

To define administrators of the module, go on the module and **right click > Modify**.
The following window will appear:

![Module window](image)

Administrators must be chosen from among the existing users.

For that purpose, click on this button: ![button](image)

module, administration, license
Administration

DEFINITION

VISUAL PLANNING administration allows to manage users, groups, permissions and planners.

It is also possible to manage different characteristics of the tool.

ADMINISTRATION ACTORS

Several actors can manage the application on different levels.

Depending on the case, this may be the same person or different people.

The actors available are:

• **Technical Administrator** is the one who manage technical side of the solution:
  ◦ performing installation,
  ◦ making backups,
  ◦ carrying out updates.

• **Functional Administrator** or **Global Administrator** is responsible of the application in use:
  ◦ he uses the login **admin** (cf. **admin user**),
  ◦ he manages the allocation of user licenses,
  ◦ he knows configuration and makes changes on all the planners,
  ◦ if necessary, he assigns the planner administrators,
  ◦ he is also the administrator of all the planners.

• **Planner Administrator** manages and maintains:
  ◦ the **settings** of a planner,
  ◦ Groups and users assigned to the planner,
  ◦ Permissions for each group of the planner.

Other VISUAL PLANNING actors which are not administrator are:

• users with modification rights,
• users with read only permission.

FUNCTIONAL ADMINISTRATORS

• **License Management**, 
- Users Management,
- Groups management,
- Schedules Management,
- Permissions Management,
- Services Management,
- Modules Management.

**TECHNICAL ADMINISTRATION**

- Display of the technical characteristics,
- Display of the version number,
- Updates,
- Log Display,
- Management of the LDAP configuration,
- Import and Export.

administration
Log Display

DEFINITION

The Log lists some actions done by the users:

- During the session of VISUAL PLANNING: Client Log for VISUAL PLANNING (Client Log).
- During the session of ADMIN CENTER: Client Log for ADMIN CENTER (ADMIN CENTER Log).
- During the day: Server Log.

This file can be required by the administrator or by the technical support of VISUAL PLANNING. sav[at]stilog[.]com

USE

Client Log Display

There are two ways to access the Client Log files:

- From the file manager.
- From VISUAL PLANNING.

From the file manager

According to the operating system, client log files are stored in:

On WINDOWS XP

C:\Documents and Settings\LoginName\VP5\logs

Where LoginName is the user name of WINDOWS.

On WINDOWS VISTA or more
Where *LoginName* is the user name of WINDOWS.

**From VISUAL PLANNING**

The Log Client can be found directly from the quick access toolbar, click on **About VISUAL PLANNING**:  

![About VisualPlanning window](image)

The following window will appear:

![About VisualPlanning window](image)

This window contains specific information: (cf. **About VISUAL PLANNING**).
Show Log

To see the log, click on **Show log**.

The following window will appear:

![Log Window](image)

It is possible to copy and paste the content of this window.

Send Log

It is also possible to send the log by email to the technical support of VISUAL PLANNING.

Just click on **Send log**.

The mailer opens on writing a new mail with the log file automatically attached.

Test Perf

This option allows users to test the connection parameters. Click on the button **Test Perf...** and the following window will appear:
This option is only reachable from ADMIN CENTER.

**Check for update**

This option allows users to check if there is a new update version of VISUAL PLANNING.

**Check for update on startup**

Enabling this option will force VISUAL PLANNING to check automatically for a new update on each software startup.

**Server Log Display**

This Log is only available on ESSENTIAL and ENTERPRISE versions.

There are three ways to access the server log files:

- From ADMIN CENTER.
- From a browser.
- From the file manager.

**From ADMIN CENTER**

Go to **Administration tools** and click on **show server 'logs'**.
From a browser

Server log files are accessible at the following address:

http://servername/vplanning/logs

Where *servername* is the name of the machine where VISUAL PLANNING is installed.

The following window will appear:

In this page, the list of server log files is visible.

A log file is created each day (several files per day if the server is restarted).

Each file is named as follows:

Log\_YYYYMMDD.txt or Log\_YYYYMMDD(X).txt

where:

- *YYYY* represents the year.
- *MM* represents the month.
- *DD* represents the day.
- *X* represents the file number. Indeed, a file is created each time you restart the server and the previous file is archived with the addition of a number as a suffix. The number increases
chronologically (the older files have the highest numbers).

You can download and/or delete each server log file.

**From the file manager**

Server Log files are accessible on the VISUAL PLANNING server, at the following directory:

**Version ESSENTIAL**

C:\stilog\VPServer Essential 5.3\webapps\vplanning\logs

**Version ENTERPRISE**

C:\stilog\VPServer Enterprise 5.3\webapps\vplanning\logs

log, technical