WEBCALENDAR PUBLICATION

INTRODUCTION

This document is the reference manual with a description of the installation and functionality of the WEBCALENDAR PUBLICATION module for VISUAL PLANNING.

Reading some chapters in this manual assumes you have a good knowledge of VISUAL PLANNING:

Refer if necessary to the use or administration VISUAL PLANNING manual.

WEBCALENDAR PUBLICATION module is optional. If this option is not subscribed, the corresponding menus are not apparent in VISUAL PLANNING.

SUBJECT

WEBCALENDAR PUBLICATION is a complementary application that broadcast in live and securely a list of events:

- For each resource: the case of an individual datebook.
- For a set of resources: the case of a team datebook.

The module provides an URL access to a *.ICS file.

The standard use for the *.ICS files is the standard ICalendar V2.

To simplify reading, we will refer later in this document, “Appointment” each ICAL entity referred.

TECHNICAL REQUIREMENTS

WEBCALENDAR PUBLICATION module has been developed and validated for:

- VISUAL PLANNING ENTERPRISE, version 5.0 (build 110228 and next).
- WEBCALENDAR, version 2 or higher

INSTALLATION

The installation of this module requires a license number.
To obtain the license number for the WEBCALENDAR PUBLICATION module, contact the sales department:

- By phone: +33 (0) 1 47 29 99 69
- Or by e-mail: sales@stilog.com

The module must be installed:

- from the ADMIN CENTER application, menu Modules
- and a Right click on ICAL > Register license

SETTINGS

Each broadcast address is depending to only one dimension.

The setting consists in defining contexts of publication to be broadcasted.

Create a publication context

In the menu Settings > Block Configuration > Click on Web Calendars
The following windows appears:

Where you **Right click on Web Calendars > Create a Web Calendar > choose the dimension**

The right part of the window is then activated:
Define the characteristics of the context, and then validate by clicking on the button **OK**.

The following characteristics are to be filled:

**Name**

It is the name of the context.

**Description**

It is an optional description of the context.

**History**

It concerns the date, the hour of the last modification of the context, and the login of the user who made this modification.

This property is automatically updated.
Activated

Simply check or uncheck the box to unable or disable the context.

A schedule for each resource

This box allows you to:

- If checked, use one URL for each resource of the filter. (cf. see below)
- If unchecked, use one URL for all resources of the filter. (cf. see below)

Categories

Choose among the headings and other attributes of events, or those that define the category of Appointment.

Content

Choose among the headings and other attributes of events, or those that define the content of Appointment.

Location

Choose among the headings and other attributes of events, or those that define the location of the appointment.

Meeting manager

Choose among the headings and other attributes of events, or those that define the Meeting manager of the appointment.

Guests

Choose among the headings and other attributes of events, or those that define the guests of the appointment.
Subject

Choose among the headings and other attributes of events, or those that define the subject of the appointment.

Events filter

This filter defines the events that will be broadcasted as appointments.

You can:

- select an existing filter,
- or create a Customized filter for the context. You must previously select the customized mention, then click on the button.

The visible appointments in the *.ICS file reflect events visible by the two filters (events and resources).

Ressources filter

This filter defines the resources on which the context applies.

You can:

- select an existing filter,
- or create a Customized filter for the context. You must previously select the customized mention, then click on the button.

The visible appointments in the *.ICS file reflect events visible by the two filters (events and resources).

Intersect the period

The period defines the events that the context of publication applies (cf. Time Period)

Modify a publication context

In the menu Settings > Block Configuration > Click on Web Calendars
In the appearing window, **Click on the selected context**

The right part is then activated, just change the settings of the context (cf. Create a publication)

**Duplicate a publication context**

In the menu **Settings > Block Configuration > Click on Web Calendars**

In the appearing window, then **Right Click on the selected context > Duplicate**.

The right part is then activated, just change the settings of the context (cf. Create a publication)

**Delete a publication context**

To remove a context, **Right click on the context > Delete**.

The following message appears:

![Question message]

Click on :

- **Yes** to confirm the deletion
- **No** to cancel

**USE**

**Display URL**

To view the broadcast URL, you must **Right click on the context > Display URL**

Two cases are possible according to the box **A shedule for each ressource** is checked or not :

- one URL for all resources
In both cases, it is possible to **copy and paste URLs** to broadcast them to users.

**Calendar readers**

The *.ICS files can be readed through many software:

- **MICROSOFT OUTLOOK 2007 and 2010** :
- **GOOGLE CALENDAR** : [http://www.google.com/calendar](http://www.google.com/calendar)
- **APPLE ICAL** : [http://docs.info.apple.com/article.html?path=iCal/2.0/fr/tps.html](http://docs.info.apple.com/article.html?path=iCal/2.0/fr/tps.html)
module, Schedule, diary, Calendar, ical, web, ics
VPPORTAL

INTRODUCTION

This page is a reference page. It includes a description of the installation and features of the VISUAL PLANNING VPPORTAL for VISUAL PLANNING.

Reading some chapters of this document assumes that you already have a good knowledge on VISUAL PLANNING software:

Directly report, if necessary, to the user's manual or the administrator's manual.

This module is optional. If this option is not purchased, matching menus will not appear in VISUAL PLANNING 5.1.

SUBJECT

The VPPORTAL module is integrated as a complementary feature allowing to view and modify information on planners from a mobile phone.

It is made of two parts:

- One part dedicated to settings (display context, informations displayed on the mobile phone,...)
- A second part dedicated to connection (The URL to be entered in the browser)

TECHNICAL REQUIREMENTS

The VPPORTAL module has been developed and validated for VISUAL PLANNING ENTERPRISE 5.2.

This module needs to use a computer terminal (PC, Apple Mac, Tablet, ...) or a mobile terminal (GSM phone, PDA, Netbook,...) connected to internet, and an internet browser compatible with xhtml.

Browsers on which the module was tested and validated are : INTERNET EXPLORER, FIREFOX, OPERA, OPERA MINI.

Operating systems on which the module was tested and validated are :

- IE6, IE7, IE8 et IE9 , FIREFOX 3.6 and +, GOOGLE CHROME (all versions), SAFARI 5.0 and + and OPERA (all versions),
- IOS5 for IPHONE/IPAD and Android's default browser 2.2, 2.3 and 4.0.
This module requires a VISUAL PLANNING installation with an access from the outside (public IP).

cf. Requirements of VPPORTAL

**INSTALLATION**

The installation of this module requires a license number.

To obtain a license number for the VPPORTAL module, please contact Sales departement:

- phone: +33 (0) 1 47 29 99 69
- email: sales@stilog.com

The module must be installed:

- from the **ADMIN CENTER** application, menu **Modules**,  
- and a **Right-click on VPPORTAL > Register license**

After registering the license, you must define the administrators of VPPORTAL:

- from **ADMIN CENTER**, menu **Modules**
• By a Right click on VPPORTAL> Modify > Administrators (cf. Administrators)

DEFINITION OF USERS

Users

Once installed, VPPORTAL behaves as licensing VISUAL PLANNING.

• The users who will use VPPORTAL must be associated to the VPPORTAL license.
• The informations that are visible and modifiable by the users of VPPORTAL are sensitive to: the users rights defined in ADMIN CENTER

For more informations on the rights, please refer to ADMIN CENTER

It is also possible to define the users of the VPPORTAL module in a dimension of the planner. cf. Settings.

Administrators

The access to the settings of the VPPORTAL module is restricted to users identified as « administrators ».

The way to define a user as an administrator of VPPORTAL is done in the ADMIN CENTER, menu Modules > Right-Click on VPPORTAL > Modify > Administrators.

The « administrators » of the planner have the access to the settings of VPPORTAL.

cf. Definition of administrators

SETTINGS

Four types of models are available on VPPORTAL and each one is linked to a dimension.

• Agenda model
• Planner model
• Event list model
• Resources list model

cf. Settings of VPPORTAL module
USE

VPPORTAL models can be viewed:

- On a computer: cf. Use of VPPORTAL module on a computer
- On a mobile: cf. Use of VPPORTAL module on a mobile

module, vpportal, portal, web
Settings of VPPORTAL module

Several VPPORTAL models can be set, each one based on one of the four available models on VPPORTAL:

- Model Agenda
- Model Planner
- Model Event list
- Model Resources list

Each model belongs to a dimension.

SETTINGS

The settings of VPPORTAL module are reachable from the seeting window of the module.

Go to the Settings tab > Configuration block > right-click on VPPORTAL.

In the window that appears, click on the Settings button in the bottom left-hand corner. The following window appears:
Description

This description is optional.

If a description is entered, it will be displayed at the overall description of the module in VPPORTAL.

It is possible to use the following own variables of VISUAL PLANNING: $USERNAME, $USERFULLNAME, $USEREMAIL in order to automatically retrieve the login, the identification headings, the email address of the used that is connected.

Display menu on the left

If the check box is checked the VP Portal tabs will be displayed on the left side of the screen. If the box is unchecked, the tabs will be displayed by default on top of the screen.

Login dimension

By default, the users of the VPPORTAL module must be declared in the VPPORTAL module license. (cf. Definition of Users).

It is also possible to define the access to the VPPORTAL module using a dimension of the planner. If so, select here the right dimension.

The following fields are then accessible:
Permission group heading

Choose the heading that will identify the user rights group of each user. This heading must be a single or multiple choice list. Different choices must be written in the same way that the rights groups in the ADMIN CENTER.

Login heading

Choose the heading that will be the login of the user on the computer or the mobile terminal. This heading must be a text heading.

Email heading

If needed, choose the heading that will pick up the email address of the user. This heading must be a text heading.

Password heading

Choose the heading that will contain and verify the password of the user when connecting to VPPORTAL. This heading must be a password heading.
Permit filter

Define the authorization filter to VPPORTAL module. For example, an “Active User” filter permits the access to VPPORTAL only for the users that are included in this filter.

User profile headings

This field allows to choose the profile headings of the user. The headings that can be selected are the headings of the login heading.

The selected headings will be editable by the user, when connected to VPPORTAL by clicking on the following button:

If an heading have a description, positioning the mouse on this one heading profile shows a tooltip that contains this description.

Terms of use Heading

Choose the heading that will verify that the user has checked and accept the terms of use. This heading must be a boolean.

Terms of use text

The text that will appear for the user to accept the terms of use will be put in this field.

Into VPPORTAL, the Terms of Use will always be accessible by clicking on the following button:

CHANGE PASSWORD

If the users are set by a dimension of the planner, the user has the possibility to change his own password

- In desktop mode

Click on the button to access the following window:
CREATE A VPPORTAL MODEL

Create an Agenda model

Go to the **Settings tab > Configuration block > Left click on VPPORTAL.**
Then the following window appears:

To create an Agenda VPPORTAL model, **left-click on models VPPORTAL > Add an agenda** >

**Choose the dimension** or click on the button and choose the dimension.

The following window appears:
Define the characteristics of the **Agenda** model and validate by clicking **OK**.

The following characteristics can be set:

**Name**

It is the Name of the model.

**Description**

It is an optional Description of the model. This description will appear on the banner of the tab in VPPORTAL.
History

It concerns the date, the hour of the creation or the last modification of the model, and the login of the user who performed the action.

This property is automatically updated.

Activated

This checkbox determines if the model is activated or not.

Background color

It is possible to choose the dimension that will set the background colour of the model.

Border color

This list allows to choose the resources of the dimension that will define the border color of the duration bar.

Events height

The height in pixel of the events duration bar.

Icon

Set the dimension that will define the icon appearing on the events duration bar.

Main data item

Choose among the headings and other attributes of the events those which will describe the events on the VPPORTAL model.
Separator

It is the separator of the description data.

Start hour

Allows to define the start hour of day display.

End hour

Allows to define the end hour of day display.

Description data

Choose among the headings and other attributes of the events those which will describe the events on the VPPORTAL model.

Display short name

This checkbox defines the display or not of the headline of the dimensions of the headings.

Editing data

Choose events datas that can be modified in the model.

Display identification headings 'Dimension 1' in the available entities list to modify a dimension's resource situated in an event.

Events filter

Choose among the existing event filters, the filters that are available in the model.

Creation Hierarchies
Choose the creation events hierarchies. If no hierarchy is selected, no event can be added using this model.

**Time period**

Choose the period of visibility of events.

**Edition's title**

Title of the events' edition window.


**Display Period**

Choose from the single choice list the period of time to be displayed when opening the model.

**Displayable Period**

Choose from the multiple choice list the period or periods of time that the user can see in the model.
Filters of "Dimension"

This filter defines the resources on which the model is applied.

It is possible to:

- select an existing filter,
- or create a customized filter for the model. To do so, select the Customized option, and click on the button.

Choice "Dimension"

This checkbox allows to activate or inactivate a pull-down menu of the resources.

Events filter

This filter defines the events of the linked resources.

It is possible to:

- select an existing filter,
- or create a customized filter for the model. To do so, select the Customized option, and click on the button.

Display extra events

It consists in choosing the resource's type headings of the dimension of the model for which the linked events must be shown.

Create an events list

Go to Settings tab > Configuration block > Left click on VPPORTAL.

The following window appears:
To create an Events list VPPORTAL model, left click on models VPPORTAL > Add an events list > Choose the dimension or click on button and choose the dimension.

The following window appears:
Define the characteristics of the model:

**Name**

It is the Name of the model.

**Description**

It is an optional Description of the model. This description will appear in the banner of the tab in VPPORTAL.

**History**

It concerns the date, the hour of the last modification of the model, and the login of the user who made this modification.

This property is automatically updated.
**Actived**

This checkbox determines if the model is activated or not.

**Description data**

Choose among the headings and other attributes of the events those which will describe the events on the VPPORTAL model.

These datas form the column of the model in VPPORTAL.

**Display short name**

This checkbox defines the display or not of the headline of the dimensions of the headings.

**Editable data**

Choose the information to be displayed in the event edition window.

Display identification headings 'Dimension 1' in the available entities list to modify a dimension's resource situated in an event.

**Event filters**

Choose among the existing event filters, the filters that are available in the model.

**Creation hierarchies**

Choose the creation events hierarchies. If no hierachy is selected, no event can be added using this model.

**Time period**
Choose the period of visibility of events.

Edition's title

Title of the events' edition window.

Filters of "Dimension"

This filter defines the resources on which the model is applied.

It is possible to:

- select an existing filter,
- or create a customized filter for the model. To do so, select the Customized option, and click on the button.

Choose "Dimension"

This checkbox allows to activate or inactivate a pull-down menu of the resources.

Number of items per page

In the desktop mode view, this options allows to choose a number of items to display per page.
Create a resources list

Go to the **Settings tab > Configuration block > Left click on VPPORTAL.**

Then the following window appears:

To create a resources list VPPORTAL model, **left-click on models VPPORTAL > Add a resources list > Choose the dimension** or click on **button and choose the dimension.**

The following window appears:
Define the characteristics of the model:

**Name**

It is the Name of the model.

**Description**

It is an optional Description of the model. This description will appear in the banner of the tab in VPPORTAL.

**History**

It concerns the date, the hour of the creation or the last modification of the model, and the login of the user who performed the action.

This property is automatically updated.
Actived

This checkbox determines if model is activated or not.

Description data

Choose among the headings and other attributes of the resources those which will describe the resources on the VPPORTAL model.

The selected data will be displayed in the columns of the model in VPPORTAL.

Edition's title

Title of the events' edition window.

Display short name

This checkbox defines the display or not of the headline of the dimensions of the headings.

Editing data

Choose resources datas that can be modified in the model.

Filter's dimension
Choose among the existing resources filters, the filters that are available in the model.

**Number of lines per page**

In the desktop mode view, this option allows to choose a number of lines to display per page.

**MODIFY A VPPORTAL MODEL**

To modify an existing model:

- Go to the **Settings tab > Configuration block > Left-Click on VPPORTAL**, the edition window appears.
- **Left-click on the right model to be modified**, the right panel of the window is activated
- Modify the model settings (cf. **Create a VPPORTAL model**).

**DUPLICATE A VPPORTAL MODEL**

To duplicate an existing model:

- Go to the **Settings tab > Configuration block > Left-Click on VPPORTAL**, the edition window appears.
- **Right-click on the model to be duplicated > Duplicate**, the right panel of the window is activated
- Modify the model settings (cf. **Create a VPPORTAL model**).

**DELETE A VPPORTAL MODEL**

To delete a model, select the model and then **Right-Click > Delete**.

The following message appears:

![Question dialog box](https://www.visual-planning.com/doc/images/question.png)

Click on:
• Yes to confirm the deletion
• No to cancel

module, vpportal, portal, web, settings

From: https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3 DOCUMENTATION


Last update: 2016/02/09 16:26
Use of VPPORTAL module on a computer

ACCESS TO VPPORTAL

From a computer, the access to VPPORTAL is available via an URL in the navigator which has the following form: http://servervpname/vplanning/web

Where servervpname is the name of the server where VISUAL PLANNING is installed.

LANGUAGE

It is possible to define the language of the user interface. To do so, just click on the flag of the desired language on the connexion window.

CONNECTION/DISCONNECTION

The name of the planning, the username and the password are the same than those used when connecting to ViSUAL PLANNING (if the identification with a dimension of the planner is not activated. cf. Settings).

At any time, the disconnection is possible by clicking on the following button:
CHOOSE A MODEL

When opening VPPORTAL, it is possible to choose one of the existing model by a simple left-click on the matching tab.

- By choosing Agenda or Events list model, the events which match are displayed. If it is an Agenda model, the start date and end date are displayed in the tooltip.
- By choosing a Resources list model, the resources which match are displayed.

USE AN AGENDA MODEL

Consult a model

The Agenda model allows to see the events on a diary, on a defined time period.

When the Agenda model is displayed, it is possible to see, event by event, some informations on the duration bar.

More detailed informations are displayed in the tooltip. The start date and the end date of the event are displayed in the tooltip too.

These informations are those that were described during the settings.
Time period

The default time period can be chosen by clicking on the following button.

An Agenda model can be seen:

- per day.
- per week.
- per month.

Events filter

When Events filter are selected in Events filter, it is possible to filter the events.
Filter by resource

When **Choice “Dimension 1”** is checked, it is possible to filter the events with the resources list of the “Dimension 1”.

Search

It is possible to filter the displayed events. This filtering is characterized by:

- Filter the displayed events
- Filter the displayed and identification headings
- Condition : contain

Notice that the headings that are not visible in the model are not taking into account for the verification of the condition when filtering.

Display the weeks

The number of the week is displayed on the left of the calendar.
Edit an event

When a double-click is done on an event, the edition window is opened. Datas displayed in an event are modifiable if the user permissions allow it.

The following events could be edited:

- Hourly
- Half-daily
- Daily

For a given dimension, resources can be modified if 'Dimension 1' is displayed in the event.
Three cases are possible:

- Click on **OK** to record the modifications
- Click on **Delete** to delete. Then, the following window appears:

  ![Delete Event Window](https://www.visual-planning.com/doc/)

  - Click on **OK** to delete or **Cancel** to cancel the deletion.

- Click on **Cancel** to unmodify the event.

### Create an event

To create an event, **Left-click** on the chosen date.

If there is no hierarchy, the event would not be created.

Otherwise, select a hierarchy among the proposed ones:
The required resources of the selected hierarchy must be chosen in the following window:

- Choice of the dimension(s)

Click on the **Cancel** button to cancel the event creation.

Click on the **OK** button to continue the creation and fill in the following window the properties of the event:

- Choice of the headings and the attributes of the events that will be displayed in the editing window of the event
Then:

- confirm the event creation clicking on the button **OK**.
- or cancel clicking on the button **Cancel**.

**USE AN EVENTS LIST MODEL**

**Consult a model**

After choosing a model, the matching events are displayed. Each event is identified with the characteristics described during the **settings**.

When the events list is displayed, it is possible to see, event by event, more detailed informations by double-clicking on an event into the list.
Events filter

When Events filter are selected in Events filter, it is possible to filter the events.

Filter by resource

When Choice “Dimension 1” is checked, it is possible to filter the events with the resources list of the “Dimension 1”.
Search

It is possible to filter the displayed events. This filtering is characterized by:

- Filter the displayed events
- Filter the displayed headings and properties
- Condition: contain

Notice that the headings and properties that are not visible in the model are not taking into account for the verification of the condition when filtering.

Edit an event

When a double-click is done on an event, the edition window is opened. Datas displayed are modifiable if the user permissions allow it.

The following events could be edited:

- Hourly
- Half-daily
- Daily

For a given dimension, resources can be modified if 'Dimension 1' is displayed in the event.
Three cases are possible:

- Click on **OK** to record the modifications
- Click on **Delete** to delete. Then, the following window appears:

```
Do you want to delete this event?

OK Annuler
```

Click on **OK** to delete or **Cancel** to cancel the deletion.

- Click on **Cancel** to unmodify the event.

**Create an event**

To create an event, **left-click** on the button:

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

If there is no hierarchy, the event would not be created.

Otherwise, select a hierarchy among the proposed ones:
The required resources of the selected hierarchy must be chosen in the following window:

- Choice of the dimension(s)

Click on the **Cancel** button to cancel the event creation.

Click on the **OK** button to continue the creation and fill in the following window the properties of the event:

- Choice of the headings and the attributes of the events that will be displayed in the editing of the event
Then:

- confirm the event creation clicking on the button **OK**.
- or cancel clicking on the button **Cancel**.

**USE A RESOURCES LIST MODEL**

**Consult a model**

After choosing a model, the matching resources are displayed. Each resource is identified with the characteristics described during the **settings**.

When the resources list is displayed, it is possible to see, resource by resource, more detailed informations by double-clicking on a resource into the list.

**Search**

It is possible to filter the displayed resources. This filtering is characterized by:

- Filter the displayed resources
Filter the displayed headings
Condition : contain

Notice that the headings that are not visible in the model are not taking into account for the verification of the condition when filtering.

Edit a resource

When a double-click is done on a resource, the edition window is opened. Datas displayed are modifiable if the user permissions allow it.

<table>
<thead>
<tr>
<th>Edition Dimension 1</th>
</tr>
</thead>
<tbody>
<tr>
<td>Text</td>
</tr>
<tr>
<td>Login</td>
</tr>
<tr>
<td>Numerical 1</td>
</tr>
<tr>
<td>Numerical 2</td>
</tr>
</tbody>
</table>

Three cases are possible:

- Click on OK to record the modifications
- Click on Delete to delete. Then, the following window appears :

  =Do you want to delete this resource?

  OK  Annuler

Click on OK to delete or Cancel to cancel the deletion.
- Click on Cancel to unmodify the resource.
Create a resource

To create a resource, **left-click** on the following button:

![Add 'Dimension 1'](image)

The following window appears:

![Edition Dimension 1](image)

Then:

- confirm the resource creation by clicking on the button **OK**.
- or cancel by clicking on the button **Cancel**.

**module, vpportal, use, computer, portal, web**
Use of VPPORTAL module on a mobile

ACCESS TO VPPORTAL

From a mobile, the access to VPPORTAL is available via an URL in the navigator which has the following form: http://servervpname/vplanning/web/m

Where servervpname is the name of the server where VISUAL PLANNING is installed.

LANGUAGE

It is possible to define the language of the user interface. To do so, just click on the flag of the desired language on the connexion window.

CONNECTION/DISCONNECTION

The name of the planning, the username and the password are the same than those used when connecting to VISUAL PLANNING (if the identification with a dimension of the planner is not activated. cf. Settings).
At any time, the disconnection is possible by clicking on the following button:

**CHOOSE A MODEL**

When opening VPPORTAL, it is possible to choose one of the existing model by a simple pressure on the matching tab.
• By choosing Agenda or Events list model, the events which match are displayed.
• By choosing a Resources list model, the resources which match are displayed.

**USE AN AGENDA MODEL**

**Consult a model**

It is possible to choose an Agenda model by a pressure on the matching tab.

The following window appears:

![Image of a monthly calendar with listed resources and details]

The matching events are displayed. Each event is identified by the characteristics described in the settings.
It is possible to see, event by event, more detailed informations. To do so, just click on an event.

**Date**

The time period can be chosen with the button:

![Options](image)

The following window appears:

![Set Date](image)

Choose the date via the cursors. When the date is defined, click on the **Date fixée** button to validate.

Click on **OK** to record the modifications.

**Time scale**

It is possible to choose the time scale with the button:

![Options](image)

The following window appears:
The period can be:

- per day,
- per week,
- per month.

Click on **OK** to record the modifications.

**Events filter**

When Events filter are selected in the Events filters, it is possible to filter the events.

An events filter can be chosen with the button:

The following window appears:
Click on **OK** to record the modifications.

**Resources filter**

When Choice “Dimension 1” is checked, it is possible to filter the events according to the resources list of the “Dimension 1”.

A resources filter can be chosen with the button:

The following window appears:
Click on **OK** to record the modifications.

**Search**

It is possible to filter the displayed events. This filtering is characterized by:

- Filter the displayed events
- Filter the displayed headings and properties
- Condition : contain

Notice that the headings and properties that are not visible in the model are not taking into account for the verification of the condition when filtering.
Edit an event

When a click is done on an event, the edition window is opened.

![Event edition window]

The following events could be edited:

- Hourly
- Half-daily
- Daily

Datas displayed in an event are modifiable if the user permissions allow it. To do so, click on the property.

Date case

If it concerns a date, one of these following windows is displayed:
Modify the day

Click on a day to modify the day. The following window appears:

Click on Set Date when the day is defined. Then, click on OK to record the modifications.

Modify the hour

This modification is available if it is an hourly event.

Click on an hour to modify the hour. The following window appears:
Click on **Set Time** when the hour is defined. Then, click on **OK** to record the modifications.

**Dimension case**

If it concerns a dimension, resources can be modified if ‘Dimension 1’ is displayed in the event.

Choose the resource and click on **OK** to record the modifications.

Three cases are possible:

- Click on **OK** to record the modifications
- Click on **Delete** to delete. The following window appears:
Click on **OK** to delete or **Cancel** to cancel the deletion.

- Click on **Cancel** to unmodify the event.

**Create an event**

To create an event, click on the following button: **Add**

If there is no hierarchy, the event would not be created.

Otherwise, select a hierarchy among the proposed ones:

The required resources of the selected hierarchy must be chosen in the following window:

- Choice of the dimension(s)
Click on **Cancel** button to cancel the event creation.

Click on the **OK** button to continue the creation and fill in the following window properties of the event:

- Choice of the headings and the attributes of the events that will be displayed in the editing window of the event
Then:

- confirm the event creation clicking on the button **OK**.
- or cancel clicking on the button **Cancel**.

**USE AN EVENTS LIST MODEL**

**Consult a model**

After choosing an events list model, the following window appears:
The matching events of the model are displayed. Each event is identified with the characteristics described during the settings.

When the events list is displayed, it is possible to see, event by event, more detailed informations. These ones are those determinated in the settings.

**Events filter**
When Events filter are selected in Events filter, it is possible to filter the events.

To select an events filter, click on the button:

![Options window]

The following window appears:

![Options window](image)

Click on **OK** to record the modifications.

**Resources filter**

When **Choice “Dimension 1”** is checked, it is possible to filter the events with the resources list of the “Dimension 1”.

To select a resources filter, click on the button:

![Options window]

The following window appears:
Click on **OK** to record the modifications.

**Search**

It is possible to filter the displayed events. This filtering is characterized by:

- Filter the displayed events
- Filter the displayed headings and properties
- Condition : contain

Notice that the headings and properties that are not visible in the model are not taking into account for the verification of the condition when filtering.

**Edit an event**

When a click is done on an event, the edition window is opened. Datas displayed are modifiable if the user permissions allow it.

The following events could be edited:

- Hourly
- Half-daily
- Daily

For a given dimension, resources can be modified if 'Dimension 1' is displayed in the event.
Three cases are possible:

- Click on **OK** to record the modifications
- Click on **Delete** to delete. Then, the following window appears:

  ![Do you want to delete this event?](image)

  Click on **OK** to delete or **Cancel** to cancel the deletion.

  - Click on **Cancel** to unmodify the event.

**Create an event**

To create an event, **click** on the following button:  

![Add button](image)
If there is no hierarchy, the event would not be created.

Otherwise, select a hierarchy among the proposed ones:

![Creating an event]

The required resources of the selected hierarchy must be chosen in the following window:

- Choice of the dimension(s)

![Creating an event]

Click on the **Cancel** button to cancel the event creation.

Click on the **OK** button to continue the creation and fill in the following window properties of the event:

- Choice of the headings and the attributes of the events that will be displayed in the editing window of the event
Then:

- confirm the event creation clicking on the button **OK**.
- or cancel clicking on the button **Cancel**.

**USE A RESOURCES LIST MODEL**

**Consult a model**

After choosing a resources list model, the following window appears:
The matching resources of the model are displayed. Each resource is identified with the characteristics described during the settings.

When the resources list is displayed, it is possible to see, resource by resource, more detailed informations by clicking on a resource into the list.

**Search**

It is possible to filter the displayed resources. This filtering is characterized by:

- Filter the displayed resources
- Filter the displayed headings and properties
- Condition: contain
Notice that the headings and properties that are not visible in the model are not taking into account for the verification of the condition when filtering.

**Edit a resource**

When a double-click is done on a resource, the edition window is opened. Datas displayed are modifiable if the user permissions allow it.

Three cases are possible:

- Click on **OK** to record the modifications
- Click on **Delete** to delete. Then, the following window appears:
Click on **OK** to delete or **Cancel** to cancel the deletion.

- Click on **Cancel** to unmodify the event

### Create a resource

To create an event, you have to **Click** on the following button: 

The following window appears:

Then:
• confirm the resource creation by clicking on the button **OK**.
• or cancel clicking on the button **Cancel**.

module, vpportal, use, mobile, tab, portal, web
Sending an email via SMTP server

DEFINITION

Sending mails from VISUAL PLANNING is possible via an existing SMTP server.

This feature is an additional module, delivered as a free tool with VISUAL PLANNING ENTERPRISE.

The main functional advantage is in the case of manual sending several emails simultaneously.

This prevents the opening of many mailing software windows.

The use of an SMTP server also enables the automatic emails send.

TECHNICAL REQUIREMENTS

This feature is a module, it is only available with the following version: VISUAL PLANNING ENTERPRISE.

It is essential that the SMTP server is accessible from the server VISUAL PLANNING.

SETTINGS

SMTP server

The settings of the SMTP server is done in the ADMIN CENTER.

Click the button Modules:

Then, Right click on Mail> Modify

The following window opens:
Click **Parameters**.

The following window comes up:

![Parameters](https://www.visual-planning.com/doc/en/9-modules/mail_smtp)

Then, set the SMTP server settings:

- **SMTP.password** : the password of the SMTP account,
- **SMTP.server** : the name of the SMTP server,
- **SMTP.user** : the name of the SMTP account, it can be an email address,
- **SMTP.port** : the SMTP port.

**Sender**

It is necessary to define the sender e-mail address.

The sender is the user of VISUAL PLANNING.

From ADMIN CENTER, click **Users**

Right click on the user> **Modify**.

The following windows opens:

![Users](https://www.visual-planning.com/doc/en/9-modules/mail_smtp)

Fill the field **E-mail**, click **Ok**.

**Recipient**

For each schedule and for each dimension using the module sending e-mail, it is necessary to create:

- One or more **text headings** that contain the e-mail addresses of the recipients.

**Marking the email sent**

However, for a good use, it is useful to create:
• A heading in a form called **VPMAIL**
  ○ **Texte** type
  ○ or **multi-line text** type
  ○ or **boolean** type

This heading can store the date, the hour of the last email send from each resource and the login of the sender.

**USE**

Using the SMTP server is transparent on the schedule.

The mailing software does not open when a mail has been sent.

cf.:

• Send resource printing by e-mail
• Sending an e-mail from an event
• Automatic sending of e-mails

smtp, enterprise
Automatic sending of e-mails

**DEFINITION**

This feature allows the automatic sending of e-mails from an event at defined frequency.

It exists only with the ENTERPRISE version of VISUAL PLANNING. This feature is adapted in case of multiple sending of numerous e-mails.

This module uses a SMTP server to send e-mails.

**REQUIREMENTS**

**Technical requirements**

This module needs an operational SMTP server.

**Functional requirement**

This module needs the creation of an e-mail sending context.

cf. *Sending an e-mail from an event*

**SETTINGS**

There are 3 settings:

- SMTP configuration server
- Trigger settings of the e-mail sending contexts
- Management of the automatic service

**SMTP server settings**

cf. *SMTP server*
Management of the sending e-mail context

It is necessary to set at least one sending e-mail context.

Menu Settings > Configuration bloc > VPMail

You can define as many email templates as needed

Right click on templates VPMail > Create a template VPMail

The following window opens:

The right panel is then activated:
It is necessary to define the characteristics of the template:

**Name**

This is the template's name.

**Description**

This is the optional description of the template.

**History**

This is the date and hour for the last modification of the template. There is also the login of the user who made it.

This property is updated automatically.
Contents

This is a free text field that contains the message body.

It is possible to insert in the text one or more entities of the planner:

- One or severals **dimension** and/or **form** heading
- One or severals values of the selected event
- Valuation item
- Global variables $USERNAME and $USERFULLNAME
- The variables of the parent event, if it is a mail sending from a son event.

**Event Filter**

This is the **event filter** which determine the possibility to send an e-mail.(cf **Use**)

Only events that respect this filter can be send.

**Mark the sending**

It is necessary to fill in this case in order to save the date, the hour and the user login who sends this event by e-mail.
**HTML format**

This box allows you to send email in HTML format

**Open mailer**

This check box allows you to activate (or not) the internal mailer of VISUAL PLANNING before to send a mail. In case of an events multi-selection, a mailer appears for each event.

This is only used in the case of sending e-mails from an event.

 cf Sending e-mails from an event

**Recipients**

It is needed to choose one or more text heading(s) that content the recipient e-mail adress.

This section may contain several addresses separated by a semicolon

**Subject**

This is a free text field that contains the subject.

It is possible to insert in the text one or more entities of the planner:

- One or several dimension and/or form heading
- One or several values of the selected event
- Valuation item
- Global variables $USERNAME and $USERFULLNAME
- The variables of the parent event, if it is a mail sending from a son event.

**Sender hidden copy**

This checkbox permits, if it is activated to send a copy to the sender. This copy will not be seen by the recipients.
Events modification/creations

The sends mail can be triggered automatically by checking this box, once the event correspond to the filter described in the context, is created or modified, an email will be sent.

The box is accessible, if the SMTP parameter data are entered in the ADMIN CENTER

Activated

This check box allows you to activate (or not) the automatic delivery service model.

E-mail address sender

It is necessary to choose an e-mail adress for the senders.

Triggers

This is to choose the frequency for sending e-mails responding to the events filter defined.

By clicking the right button, the following windows opens:

![Trigger Selection Window]

The buttons Add and Delete give the possibility to add or delete a service trigger.

After adding one, two parameters must be defined:

Column Frequency sets the type of periodicity:
• Every minute: it sends several times per day
• Every day: it sends once per day

Column Information sets the type of frequency:

• If Every minute: it sets the interval in minutes between two email sends.
• If Every day: it sets the time at which the email send will be made every day.

Click Ok to save the parameters.

Management of the service

Starting and stopping the service

Since ADMIN CENTER, click Services:

In the list of services:

Starting the service: Right click on Send Mail > Start service
Stopping the service: Right click on Send Mail > Stop service

For more information about the services: Management of the services

Automatically start

Since ADMIN CENTER, click Services:

In the list of services, Right click on Send Mail > Modify

The following windows opens:
Then, it is possible to define if the email send service to be launched by checking the **Automatic start**.

**USE**

The use of this feature is transparent on the schedule.

For each model for sending mail with at least one trigger, all events that meet the filter defined in the model are sent.

The only visible action in the schedule is marking the sending history in the event, if it is enabled.

The email address of the sender is: the user email adress defined ADMIN CENTER if the shipment manually one or the user email adress defined in the context of the mail if the shipping is automatic.

**Marking Event**

In case the mail template uses the functionality of marking-off, the history is stored in the event sent:

- in a form heading called **VPMAIL** (cf. functional requirements, above)
- in the event note, if the form heading does not exist.

**event, mail, smtp, auto**
Automatic sending of e-mails

From:
https://www.visual-planning.com/doc/ - VISUAL PLANNING 5.3

DOCUMENTATION

Permanent link:
https://www.visual-planning.com/doc/en/9-modules/mail_auto

Last update: 2016/10/31 14:05
INTRODUCTION

This document is the reference manual of the SMS module for VISUAL PLANNING.

To be able to understand this chapter, you should have a good knowledge on VISUAL PLANNING. If necessary, refer to Use chapter.

The SMS module is a paying option. If this module is not subscribed, the corresponding menus will not be displayed in VISUAL PLANNING.

DEFINITION

The SMS module is an additional feature allowing SMS sending from VISUAL PLANNING to all kind of phone numbers which accept the SMS format (nationals or internationals).

It consists of:

- Settings of the SMS sending server
- Settings interface in VISUAL PLANNING (structure settings of the SMS and the sending rules)
- Triggering from the contextual menu of events in VISUAL PLANNING.

Requirement

Technical requirements

The SMS module has been developed and validated for the VISUAL PLANNING ENTERPRISE version.

To configure this module, you will need:

- An internet connection
- A contract with one of our partners:
  - ESENDEX,
  - BULKSMS.

In order to use the “MAIL to SMS” feature (as described in Case 2 below), it is required to set up an SMTP server beforehand.

For any other providers of the MAIL TO SMS services, please contact our hotline support@stilog.com

Functional requirements

This module needs a Text heading with the phone number of the recipients.

To optimise the use, we advise to use a Text heading or a Multiple-line text heading in a form named VPSMS.

For each SMS sent from an event, the sending date and the sender login is saved in this heading.

INSTALLATION
The installation of this module requires a license number.

To obtain the license number for the **SMS** module, contact the sales department:

- By phone: +33 (0) 1 47 29 99 69
- Or by e-mail: sales@stilog.com

The module must be installed:

- From **ADMIN CENTER**, menu **Modules**, and **Right click on SMS > register licence**

**USERS SETTING UP**

Users

After its installation, this module behaves like the **VISUAL PLANNING** standard licences.

- You have to assign the license to the user logins who use it.

  cf. **Licences management**

Administrators

Only the administrator is allowed to set-up this module.

The user setting up as an administrator of this module is done in the **ADMIN CENTER**, menu **Modules > Right Click on SMS > Modify > Administrators**

  cf. **Management of administrators**

**SETTINGS**
The settings need two actions:

- Set-up the SMS sending server in the **ADMIN CENTER** interface
- Set-up the SMS sending contexts in the **VISUAL PLANNING** interface

**Definition of the SMS sending server**

In the **ADMIN CENTER** interface, click on **Modules**:

![Modules](image)

Then in the modules list, **Right Click on SMS > Modify**

![Module Properties](image)

Then click on **Properties**
You have to fill out the parameters of the SMS sending server.

Two technologies can be used :

- Direct sending (available only with our partner : ESENDEX)
- Mail to SMS (available with both partners, ESENDEX and BULKSMS)

Case 1 : Direct sending with ESENDEX

You have to fill out the following parameters :

- SMS.esendexNum
  This is the ESENDEX account number.
- SMS.esendexPwd
  This is the password of the ESENDEX account.
- SMS.esendexUser
  This is the login of the ESENDEX account.
- SMS.provider
  This is the choice of the technology to use. The value is ESENDEX.

Others parameters

All other parameters must be blank.

Case 2 : Mail to SMS

The documentation of this feature is reachable on-line for each provider :
You have to fill out the following parameters:

**SMS.mailDomain**
This is the domain name of the mail to SMS. It depends on the provider:

- **ESENDEX**: the value is `echoemail.net`
- **BULKSMS**: the value is `bulksms.net`

**SMS.mailSender**
This is the email of the provider account (ESENDEX or BULKSMS) which is used to convert the mail to SMS.

**SMS.mailSubject**
This is the object of the email which is converted to SMS.

According to the supplier and the security level, this subject can or not appear in the SMS as prefix.

**SMS.provider**
This is the choice of the technology to use. The value is `MAILSMS`.

**Others parameters**
All other parameters must be blank.

**Definition of the SMS sending context**
It is necessary to define at least one template of SMS sending.

For that, go in the menu **Settings > Configuration > VPSms**

If this menu is not displayed or greyed, please verify that:

- The module is properly installed
- The module meets the requirements
- The user is defined as an administrator of the planner

It is possible to define so much templates as it is necessary.
The editor appears and to create a new template, you can **right click on the VPSms template**.

Create **VPSms template**

The right panel is activated:

![VPSms template interface](image)

It is necessary to define the characteristics of the template:

**Name**

It is the name of the template.

**Description**

It is the optional description of this template.

**History**

It is the date, time of the last modification and the user login who has done this modification.

This property is automatically updated.

**Contents**

It is a free text field which contents the body of the message.

It is possible to include in this text one or several entities of the planner (headings and event values).
Event filter

It is the event filter which determines the possibility or not to use the template to send SMS from a selected event (cf. Use). Only the events matching with this filter can use this template.

More than 160 characters

To check this box allows splitting the SMS every 160 characters.

Marked the sending

To check this box allows saving the date, time, and user login of the user who sent the SMS from an event. The sending is marked in a form heading named VPSMS within the event. If this heading does not exist, the information is saved in the event note.

Phones

It is a text heading which contains the phone number of the recipient:

- The number can contain the following characters: space, point (.), plus (+) or minus (-)
- For example in France, the number must start by 06 or by an indicative (0041 or +33)

USE

The module runs by Right click on one or several events > Send SMS.

If several SMS templates can be used for the selected event(s), the user can select the chosen template among a list.
<table>
<thead>
<tr>
<th>Modifier</th>
<th>Send sms</th>
<th>VPSms template 1</th>
<th>VPSms template 2</th>
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<td>Duplicate</td>
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<td>Mail merge</td>
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<tr>
<td>Geolocation</td>
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</tbody>
</table>

sms, mail-to-sms
RSS FEED

INTRODUCTION

This document is the reference manual with a description about the features of the module **RSS** for VISUAL PLANNING.

Reading some chapters of this manual assumes you have a good knowledge on VISUAL PLANNING. If necessary, refer to **Use** chapter.

DEFINITION

The RSS Feed module is an additional application allowing sending an events list:

- either for each resource
- either for a group of resources

The module provides an URL for accessing the file.

PREREQUISITES

The RSS module has been developed and validated for **VISUAL PLANNING ESSENTIAL, ENTERPRISE**, version 5.2. It requires no additional license for using it.

SETTINGS

Each RSS feed is linked to one dimension. The settings consist in defining the RSS contexts to be displayed.

Create an RSS feed

In **Settings menu > Configuration bloc**, click on **RSS feed**
The editing window opens. Right click on Feed RSS > Create an RSS feed > Choose the dimension

The right side of the window is then activated
You can then define the RSS feed settings and click OK to validate. The following features can be defined:

**Name**

Defines the name of the RSS feed.

**Description**

It is an optional description of the utility of this RSS feed.

**History**

It concerns the date, the hour of the last modification of the context, and the login of the user who made this modification.

This property is automatically updated.

**Activated**

Simply check or uncheck the box to enable or disable the feed.

**A feed for each resource**

This check box allows:

- If checked, publishing one URL per filter's resource (cf. here below)
- If unchecked, publishing one URL for all the filter's resources (cf. here below)

**Content**
Choose among the headings and other attributes of events, or those that define the content of this feed.

**Maximum item number**

This is the feed's maximum item number.

**Date of publication**

This is the date when the RSS feed will be send:

- Event - Start date: the publication date is the event start date
- Event - End date: the publication date is the event end date
- History creation date: the publication date is the event creation date
- History modification date: the publication date is the event modification date

**Title** Choose among the headings and other attributes of events, or those that define the subject or the title of this feed.

**Events filter** This filter defines the events that trigger the RSS feed. It is possible to:

- Select an existing filter,
- Or create a customized filter, for this RSS feed only. For this, you need to select the customized option, then click on button.

**Resources filter** This filter defines the resources that trigger the RSS feed. It is possible to:

- Select an existing filter,
- Or create a customized filter, for this RSS feed only. For this, you need to select the customized option, then click on button.

**USE**

**Display URL**

For displaying the publication URL, you need to Right click on the RSS feed's name > Display URL. Two cases are possible according to the box A feed for each ressource is checked or not:

- one URL for all resources
• one URL per each resource
In both cases, it is possible to **copy and paste URLs** to broadcast them to users.

**Broadcast**

There are several ways to access the data generated by the RSS feed.

For instance:

- A messaging service, for having the information, while checking the emails,
- An internet browser to see the information on a web page,
- Software termed RSS reader, aggregator, or feed reader, which can be web-based, present RSS feed data to users.

**rss, module, subscription, export**
Chatrooms

INTRODUCTION

This document is the reference manual with a description about the installation and functionalities of the module Chatrooms for VISUAL PLANNING.

Reading some chapters of this manual assumes you have a good knowledge on VISUAL PLANNING. If necessary, refer to Use chapter.

DEFINITION

The Chatrooms module allow to share informations on the resources and/or the events between users of the same planner.

When a chatroom is created, users that are authorised to see these chatrooms in the Management of the permissions will be able to interact.

PREREQUISITES

Technical prerequisites

The Chatrooms module has been developed and validated for VISUAL PLANNING ESSENTIAL and VISUAL PLANNING ENTERPRISE, version 5.2.

Functional prerequisites

The Chatrooms module requires the creation of at least one chatroom in VISUAL PLANNING.

SETTINGS
Definition of the administrators

The administrator is the user that can create, modify and delete chatrooms. By default, the admin user of VISUAL PLANNING and the administrators of the planner can do these actions.

Setting a user as a Chatrooms administrator is done in the ADMIN CENTER, menu Modules > Right-click on CHATROOM > Modify > Administrators (cf. Modules management)

In a ESSENTIAL version, only the admin user can create chatrooms.

Users rights

The visibility of all or part of chatrooms for a user or a group can be managed in the rights of VISUAL PLANNING. cf. Management of the permissions

Create a chatroom

To create a chatroom, go to Settings tab > Configuration block > Click on Chatrooms.

In the following window, click on Create a ChatRoom in the upper left. It is also possible to create a chatroom by right-clicking on ChatRooms > Create a ChatRoom.
You can define as many Chatrooms as needed.

Once the chatroom is created, the setting window appears in the right part of the window.

Specify the following characteristics of the chatroom:

**Name**

It is the name of the chatroom.
Description

It is the optional description of the chatroom.

History

It concerns the date, hour of the last modification of the chatroom and the login of the user who made
the modification.

This property is automatically updated.

Modify a chatroom

To modify an existing chatroom, go to Settings > Configuration block > Right-click on Chatrooms, the edition window appears.

Left-click on the chatroom you want to modify, the right part of the window is then activated.

Modify the characteristics of the chatroom (cf. Create a chatroom) and click on OK to validate
modifications.

Delete a chatroom

To delete a chatroom, select the discussion and Right-click > Delete.

The following message appears:

Click on:

• Yes to confirm the deletion,
• No to cancel.

Use
**Display**

When the user is connected to the planner, if a chatroom has begun and if the user has the visibility rights on the chatroom, the chatroom can be launched:

- by clicking on the icon in the lower right of the screen,
- by going on the Settings menu > Extra View block > ChatRooms.

The Chatrooms will appear.

*If several chatrooms exist, they will be represented into different tabs.*

![Chatroom window](image)

An opened Chatroom window does not avoid the browsing on the planner.

**New elements in the chatroom**

If new elements are added by another users, the icon on the lower right will be displayed like that:
These elements will have the login and the full name of the user along with the date (or the hour if the date is today's date) when the element was sent.

**Write a text**

It is possible to write a text in a chatroom. To do so, write a text in the writing window and send it by clicking on **Send** button.

**Share a resource in the chatroom**

It is possible to share the properties of a resource in a chatroom. To do so, go on a Resources view or a Schedule view.

1. Drag the resource on the writing area of the chatroom window. The attached file will be placed in the lower part of the window. To send it, write an accompanying text in the writing area and click on **Send**.
2. A click on the link will open the resource with a Resources Input Editor if an editor has been set for this type of resource or with the default editor.

**Share an event in the chatroom**

It is possible to share the properties of an event in a chatroom. To do so, go on an Events view.
1. Drag the eventon the writing area of the chatroom window. The attached file will be placed in the lower part of the window. To send it, write an accompanying text in the writing area and click on Send.
2. A click on the link will open the event with a Events Input Editor if an editor has been set for this type of event or with the default editor.


GeoLocation

INTRODUCTION

This document is the reference manual with a description about the installation and functionalities of the module GeoLocation for VISUAL PLANNING.

Reading some chapters of this manual assumes you have a good knowledge on VISUAL PLANNING. If necessary, refer to Use chapter.

DEFINITION

Geolocation module VISUAL PLANNING allows to:

- Calculate and display the geographical location of a resource,
- Show the possible paths,
- Calculate the distances of these trips, especially during the Assignment resources to an event,

This module provides a new criterion for planning decision: distance calculation.

For example, it is now possible to find the people closest to the location of the customer location.

PREREQUISITES

Technical prerequisites

The Geolocation Module was developed and validated for VISUAL PLANNING ENTERPRISE 5.2.

The following features require Internet access:

- Calculation of GPS coordinates,
- Visualization of locations on map,
- Routing visualization,
• Distance calculation between two locations.

The Geolocation Module is using MapQuest.com to generate maps and distance information.

The use of MapQuest requires the creation of a key with MapQuest.

**Creating a MapQuest key**

To create a MapQuest key, go to the website: [http://developer.mapquest.com/](http://developer.mapquest.com/)

Once on the website, in the top right corner of the main page click on the link “Create Account”.
After entering the necessary information, click on the “Create Account” button in the dialog box. You will then receive the confirmation of your account creation.
After up to an hour, an email will be sent at the address you indicated. It contains your MapQuest key (also called Open service key). You may also retrieve your key directly on the MapQuest website at: http://developer.mapquest.com/web/info/account/app-keys/web/info/account/app-keys

The Mapquest key is shown in the Application Key column.

**Functional prerequisites**

The Geolocation Module ideally requires that a planner is configured with:

- at least two Geolocation headings,
- at least one Distance heading in a form.

**SETTINGS**

Once you are in possession of a key MapQuest, you must save it in Visual Planning to make functional the geolocation
Definition of administrators

There is no specific administrator for this module.

Rights management

The features of this module are available to all users who have rights of visibility and modification of the items used.

USE

View location

For each dimension having at least one Geolocation heading, a new item View location appears in the Context menu:

- of resources,
- and context menu of events.

After selecting the item, a new window appears:
This window allows you to view the position of the resource or the selected event.

In case of multiple selection, several positions appear on the same map.

**View routing**

For each dimension having at least two Geolocation heading, a new item View routing appears in the Context menu of its resources.

Similarly, for each event having at least two geo-resources, the same View routing item appears in the context menu of the event.

After selecting the path, a new window appears:
This window allows you to view routing between the two selected points.

In case of multiple selection, several paths appear on the same card.

**Assignment**

The Geolocation module allows a distance calculation with two new criteria during Assignment:

- Computation of distances
- Location period.

cf. Assign to the distance

**Distance**

Heading form of distance type allows the calculation and storage of the distance between two geo-resources present within an event
Example: Calculate the distance between the site and the client for an event.

You can then use the result in different features of VISUAL PLANNING.

cf. Distance heading

Using by other features

- Operation Heading
- Filter
- Events Report

Geolocation, distance, position, trip, path, routing