Modules
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Chapter I. Geolocation

1. DEFINITION

The VISUAL PLANNING GEOLOCATION module enables you to:

■ Calculate and visualize the geographical position of a resource,
■ Visualize possible routings,
■ Calculate the distances of these routings, particularly when assigning resources to an event.

This module therefore provides a new criterion for help with planning: **calculation of distances.**

For example it is now possible to find the people closest to the work location.

2. PREREQUISITES

Technical prerequisites

Some of these functionalities require Internet access:

■ Calculation of GPS coordinates,
■ View of positions,
■ View of routings,
■ Calculation of distances.

The GEOLOCATION module can be used with **Google Maps** or **HereWeGo**.

In order to use either of those properties, you must obtain an API key.

For each provider, please refer to the following links to learn more about maximum number of requests and plans limits:

■ Here We Go: [https://developer.here.com/plans](https://developer.here.com/plans).

Functional pre-requisites

The GEOLOCATION module requires:

■ The presence of at least two **Geolocation** type headings in one or more dimensions,
Creating a key for Google Maps

In order to use the Google Maps API you must create a “key”. To do that, you must have a Google account.

Once you have a Google account, log into the following address: https://console.developers.google.com/home

Now type in your IDs, then click on **Select a project** to display the following window.

Create a new project by clicking on this button **+**. Now enter the name of your project in the window that displays. Click on **Create** to create the project.

To go to your new project click on the link that is displayed in the previous project selection window.
Once you have chosen your project, create an **API key** by clicking on "Access the API preview":

Click on **IDs** to create an ID. This identifier is mandatory in order to access the APIs. Now click on **Create IDs > API key**.
Copy the key and paste it for the next steps.

Once the key is generated, go back to the "Dashboard" or "Library" menu to enable the following APIs:

- Google Maps JavaScript API,
- Google Maps Geocoding API,
- Google Maps Distance Matrix API,
- Google Maps Directions API.

To do this go to the following interface:
Find the APIs above, click on each API and enable it:

Creating a key for HereWeGo

In order to use the HereWeGo API you must create a “key”. To do that, you must have a HereWeGo account. To create an account, go to the following page: https://developer.here.com/.

Click on the Get Started for Free button.

The following window will show. Fill in the form to register a new account.
Once your account is created, click on the menu located in the top right corner, next to your username. The following window will show:

Click on **Projects** to display the next window. Click on **Select a plan for a new project.**
Click on the **Sign Up** button for the FREMIUM plan.

Follow the instructions displayed. Once you reach the window below, click on the **Generate App ID and App Code** button from the **JavaScript/REST** menu to generate the API keys.
Two keys are generated: an **App ID** and an **App Code**.

Copy both keys and keep them at hand for next steps.
3. CONFIGURATION

Prerequisites

Only users identified as “Administrators” have access to the configuration of Geolocation.

To define a user as an administrator of the Geolocation module you must log into the Admin Center. Then in the “Modules” category, right-click > Modify on the GEOLOC module.

In the window that is displayed, click on “Administrators” to select the administrators in the left-hand column and use the arrows to move them to the right-hand column.

Now click OK to confirm.

Configuration

Once you have obtained the Google Maps or HereWeGo key, you must register it in the settings for the Geolocation module to enable it.

Log into the Admin Center as an administrator.

Then in the “Modules” category, right-click > Modify on the GEOLOC module.

In the window that is displayed click on […] in the “Settings” field to show and edit the module’s settings.

Select either GoogleMapsService or HereWeGoService in the PROVIDER field, depending on the one you plan to use.
Paste or type in the key obtained above in the PROVIDERINFO field.

- For **Google Maps**: paste the API key obtained;
- For **HereWeGo**: paste both keys separated by a semicolon, without spaces, in the following order: App ID;App Code.

Close all the windows by clicking on “OK” and “Validate”.
4. USE

View location

For each dimension that has at least one Geolocation type of heading, a new Geolocation menu item is displayed in the pop-up menu:

■ of its resources,
■ and of events that have at least one such geolocalized resource.

After selecting the heading a new window is displayed:
This window enables you to view the location of the selected resource or event. If several resources or events are selected, several locations appear on the same map.

**View routing**

For each dimension that has at least two Geolocation headings, a new View routing menu item is displayed in the pop-up menu for its resources.

Similarly, for each event that has at least two geolocalized resources, this same View routing menu item is displayed in the event's pop-up menu.
After selecting the routing, a new window is displayed:

This window enables you to view the routing between the two selected points.
Assignment

The Geolocation module provides a distance calculation that gives you two new criteria to assist with assignment:

■ Calculation of distances,
■ Localization period.

See Assignment according to distance

Calculate the distance

You can calculate the distance between 2 headings defined when configuring the Distance type heading.

To do so, right-click on the event > Geolocation > Calculate remotely > Choose the required Distance heading.
The following window opens during calculation if calculation takes a certain time.

The result is visible in the event form.
Distance

The distance type of form heading makes it possible to calculate and store the distance between two geolocalized resources comprised within an event.

*Example: Calculate the distance traveled between the office and the customer for a work event.*

You can then use the result in different VISUAL PLANNING functionalities.

see [Distance type heading](#)

Scheduling of events

The scheduling functionality minimizes the gaps between end and start dates of events.

The events that are scheduled must be the hourly type.

To schedule events according to location, select the events to schedule > right-click on one of the selected events > [Geolocation > Scheduling](#).

The following window is displayed:

![Scheduling window](image)

Specify the following characteristics:

**Tour start time**

If the tour start time is specified, the first event to schedule will start at the time defined in this field.

Otherwise the tour start time will begin at the time of the first event.
**Alignment**

Define the alignment value between the events once the calculation has been performed.

*Example:* If there are 2 events to schedule. The first event event 1 starts at 8 a.m. and ends at 10 a.m.. The journey time from event 1 to event 2 is 52 minutes. If the chosen alignment value is:

- 0 minute: event 2 will start at 10.52 a.m.,
- 5 minutes: event 2 will start at 10.55 a.m.,
- 1 hour: event 2 will start at 11 a.m.,

**Location of departure**

If this field is defined, the calculation will start at the location defined in this field. Otherwise, the location of departure will be the location of the first event.

*Example:* If the location of departure is your office, you must select the heading comprising the office’s address in this field.

**Location of the tour**

Specify the heading that will be used for scheduling.

**Show Map**

Check this box to display the map after the calculation.
Chapter II. RSS Feed

1. DEFINITION

The RSS FEED Module is an additional application enabling you to distribute a list of events synchronously:

■ either for each resource,
■ or for a set of resources.

The module makes available an URL giving access to the RSS file.

2. TECHNICAL PREREQUISITES

The RSS FEED module was developed and validated for VISUAL PLANNING ENTERPRISE.

The RSS FEED module is contained in the VISUAL PLANNING kernel and an additional license is not required in order to enable it.

3. CONFIGURATION

Each distribution address is attached to a dimension.

To configure you must define the Feed contexts to distribute.

Creating an RSS FEED

Go to Settings > Configuration block, click on RSS FEED.

The editing window opens.

Right-click on RSS FEED > Create an RSS FEED > Choose the dimension.
The corresponding part is then enabled:
Specify the characteristics of the feed context, then confirm by clicking on the **Validate** button.

The following characteristics must be entered:

**Name**

Give the RSS FEED context a name.

**Description**

Give a description explaining the purpose of this feed. This data is optional.

**History**

This represents the creation date and time and the most recent change to the context, together with the login of the user who performed these actions.

This property is updated automatically.

**Enabled**

Check or uncheck the box to respectively enable or disable the feed context.
A feed for each resource

This box:
- enables you to publish one URL for each resource in the filter below if it is checked (see below)
- enables you to publish one URL for all the resources in the filter below if it is not checked. (See below)

Content

Choose from the headings and other event attributes the item or items that will define the Feed content.

Maximum number of items

Define the maximum number of items present in the feed.

Publication date

This is the date when the feed will be sent:
- Event - Start date: the sending date is the event start date,
- Event - End date: the sending date is the event end date,
- History - Created on: the sending date is the event creation date,
- History - Modified on: the sending date is the event modification date.

Title

Choose from the headings and other event attributes the item or items that will define the title of the feed sent.

Events filter

This filter defines the events to which the Feed context applies.

You can:
- select an existing filter,
- or create a custom filter specific to the publication context. To do this, select Customized.

The content visible in the feed corresponds to the events visible via the two events and resources filters.

Resource filter

This filter defines the resources to which the Feed context applies.

You can:
■ select an existing filter,
■ or create a custom filter specific to the publication context. To do this, select *Customized*.

The content visible in the feed corresponds to the events visible via the two events and resources filters.

### Modifying an RSS FEED

To modify an existing RSS context, go to the **Settings menu > Configuration block > RSS Feed**, then **Click on the context to modify**.

The corresponding part is then enabled. Modify the settings (see [Creation of an RSS Feed](#)), then click on **Validate** to save any modifications.

### Deleting an RSS FEED

To delete an RSS context, go to the **Settings menu > Configuration block > RSS Feed**, then **Right-click on the context to delete**.

The following message appears:

![Question dialog box](image.png)

Click on:

■ **Yes**, to definitively delete the context,
■ **No** to cancel the deletion.

### 4. USE

### Displaying the URL

To display the distributing URL, **Right-click on the publication > Display the URL**.

There are two possible situations depending on whether the *One feed for each resource* box is checked or not:

■ one URL for all the resources,
■ one URL per resource.

In both cases, it is possible to copy-paste the URL or URLs to distribute them to users.

**Distribution**

There are several ways to access the information threads generated by an RSS FEED.

You can use:

■ a messaging software and receive this information at the same time as you consult your e-mails,
■ a Web browser and display the different information feeds in the form of a home page,
■ a specialized software for consolidation of RSS information threads, also known as a news reader or feed aggregator.
Chapter III. Send SMS

1. DEFINITION

The SEND SMS module is an additional functionality making it possible to send an SMS from VISUAL PLANNING to any type of telephone number that accepts the SMS format (national or international).

It consists of:

- a configuration of the SMS sending server,
- a configuration interface accessible from VISUAL PLANNING (configuration of the structure of SMSs and sending conditions),
- triggering from the pop-up menu of VISUAL PLANNING events.

2. PREREQUISITES

Technical prerequisites

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

This module requires:

- an Internet connection,
- registration with our partner ESENDEX.

In addition, the “MAIL to SMS” functionality (Situation 2 below) enables you to send SMSs automatically via the Send Mail functionality. To use this functionality you must first set up the SMTP server for the Send Mail module.

To use a different supplier for the MAIL TO SMS service, please contact our technical department at sav@stilog.com

Functional pre-requisites

This module requires a text heading containing the recipient’s phone number, or a concatenation of the phone number and the suffix making it possible to use Mail to SMS.

For optimum use, we recommend you use a Text or Multi-line Text type of form heading called VPSMS in order to store the sending date and the sender’s login, instead of the event note.

3. DEFINING ADMINISTRATORS

Only users identified as “administrators” have access to the module’s configuration.
A user is defined as a module administrator in the Admin Center, Modules menu > Right-click on the SMS module > Modify > Administrators.

The planner “administrators” also have access to configuration of the SMS module.

4. CONFIGURATION

Configuration requires two actions:

- configuration of the SMS sending server in the Admin Center,
- configuration of the SMS sending contexts in VISUAL PLANNING.

Configuration of the Send SMS server

The server for sending SMSs is configured in the Admin Center.

In the list of modules, right-click on SMS > Modify.

Now click on Settings
You must now enter the settings for the SMS sending server.

Two technologies can be used:

- Direct sending,
- Mail to SMS.

**Situation 1: Direct sending,**

You must type in the following settings:

**SMS.esendexNum**

Enter the ESENDEX account number.

**SMS.esendexPwd**

Enter the ESENDEX password.

**SMS.esendexUser**

Enter the ESENDEX account login.

**SMS.provider**

Here you choose the technology to use. Select ESENDEX.

**Other settings**

All the other settings must be left empty.

**Situation 2: Mail to SMS**

The documentation for this functionality is available online by following this link.
You must type in the following settings:

**SMS.mailDomain**
Enter the domain name of the e-mail to convert to an SMS. Enter the `echoemail.net` value.

**SMS.mailSender**
Enter the e-mail address of the ESENDEX account that will perform the conversion from Mail to SMS.

**SMS.mailSubject**
Enter the subject of the e-mail to convert to an SMS.

Depending on the supplier and the chosen security level, this subject may or not be shown in the SMS as a prefix.

**SMS.provider**
Here you choose the technology to use. Select `MAILSMS`.

**Other settings**
All the other settings must be left empty.

### Configuration of the Send SMS context

You must configure at least one template for sending SMSs.

To do so, go to **Settings > Configuration Block > VPSms**.

If the **Tools > SMS Configuration** menu does not display, or displays grayed, this may be because:

- the module is incorrectly installed,
- the module you are using does not have the prerequisites,
- the access profile is not defined as a planner administrator.

The editing window opens, **right-click on VPSms Templates > Create a VPSms Template**.

The corresponding pane is enabled:
You must now define the template's characteristics.

**Name**

Enter this template's name.

**Description**

Enter a description for the template. This data is optional.

**History**

This represents the creation date and time and the most recent change to the template, together with the login of the user who performed these actions.

This property is updated automatically.

**Content**

This is a free text zone which contains the body of the message.

You can insert one or more planner entities into this text (event attributes and headings).
Events filter

This is the event filter that will determine whether or not it is possible to use the template to send the selected event by SMS (see Use).

Only events complying with this filter can use the template.

More than 160 characters

Check this box to split the SMS content every 160 characters. Several SMS are then sent.

Mark the sending

Check this box to save the date and time the event was sent by SMS, and the login of the user who sent it. This information is saved in the event form’s VPSMS heading if this heading exists, otherwise it will be saved in the event note.

Recipients

This is a Text type of heading to be chosen from those that exist:

- The number can contain space, period (.), plus (+) and minus (-) characters.
- The number must start with 06 (or 07) or with an international code (e.g. 0041 or +33).
5. USE

Manual sending of an SMS

The SMS can only be sent manually. To send SMSs automatically, you must use the "Mail to SMS" module (see below).

To execute the module, right-click on one or more events > Send an SMS > Choose the template.
Send using Mail to SMS

Among other things, this functionality enables you to send SMSs automatically.
To do so:

■ Configure the SMS module in the Admin Center as above.
■ A Text type of heading containing the phone number concatenated with the "@echoemail.net" suffix must exist.
■ An e-mail is sent instead of a direct SMS. You must therefore configure a Mail template.

Once these settings have been created, the content of the SMS is configured in the Send Mail module (see Sending e-mails).
Chapter IV. Sending e-mails

1. DEFINITION

You can use VISUAL PLANNING to send e-mails. Depending on the version, this is done:

- From a resource:
  - Sending an empty e-mail to write,
  - Sending an e-mail with the print-out of a resource in PDF format as an attachment,
- From an event:
  - Manually or automatically sending a pre-formatted e-mail.

The planner administrator can choose the method for sending e-mail, using:

- either a messaging software,
- or an SMTP server.

A SMTP server is required in order to send e-mail automatically, and this is only possible with the VISUAL PLANNING ENTERPRISE version.

2. SENDING E-MAIL FROM A RESOURCE

DEFINITION

VISUAL PLANNING enables you to send e-mail from a planner resource. You can send:

- an empty e-mail to write,
- or an e-mail with the print-out of the resource in PDF format as an attachment.

The recipient's address can be defined in the planner by the content of a heading, or else entered by the user when sending.

The subject of the e-mail and a text message can also be typed in. Additional documents can also be attached to the message.

PREREQUISITES

Technical prerequisites

A messaging software must be installed on the client workstation sending the e-mail.
This functionality has been validated for MICROSOFT OUTLOOK OFFICE 2007 and later. The SMTP server must be accessible from the VISUAL PLANNING server.

**Functional pre-requisites**

This functionality has no indispensable pre-requisites. However, for optimum use it is recommended to create for each dimension using sending of e-mail:

- One or more Text headings containing the e-mail addresses of the message recipients.
- A resource heading called **VPMAIL** whose type is:
  - **Text**,  
  - **Multi-line text**,  
  - **Boolean**.

The last type enables you to store the date and time the last e-mail was sent from each resource, as well as the sender’s login. In the case of Boolean headings, they are checked once the e-mail has been sent.

**SMTP server**

In this case, you must define the e-mail address of the sending user.

To do so, go to the Admin Center, then in the **Users** section, **Right-click on the user > Modify**.

Then in the window that opens, type in the **User’s E-mail address** and finally **Validate**.

**CONFIGURATION**

**Sending an empty e-mail to write,**

This functionality does not require any configuration.

**Sending a resource print-out by e-mail**

This functionality uses the configuration created for printing a resource.

This configuration is saved in the favorite display when it is saved. It can also be modified each time it is used (see below)

To send e-mail using an SMTP server, you must define its configuration (see below).

**USE**

**Sending an empty e-mail to write,**

To send an e-mail, **Right-click on a resource > Send an e-mail.**
If one or more of the resource’s headings contains one or more e-mail addresses, they will be included directly as addresses of e-mail recipients.

The remaining definition of the e-mail and the method for sending it depend entirely on the messaging software.

**In the case of messaging software**

In the ONE and ENTERPRISE versions (if the SMTP server is not configured), each time you send e-mail, the messaging software window opens so you can:

- Fill or modify the different e-mail fields (subject, mail body, etc.)
- Validate sending.

**In the case of an SMTP server**

In ENTERPRISE version, if the SMTP server is configured, and e-mail is sent from a resource, a VISUAL PLANNING mailer opens automatically instead of the messaging software.
The sender’s e-mail address is the address of the user defined in the ADMIN CENTER.

Sending a resource print-out by e-mail

This functionality enables you to send an e-mail with an attachment: a PDF file containing a print-out of the selected resource.

In the case of multiple resource selection, a single PDF file will be sent to all the selected resources. The file will contain a print-out of the selected resources, with one resource on each page.

To use this functionality, just right-click on a resource > Send > PDF by e-mail.
The print configuration window is displayed:

By default, the print settings are the settings saved in the favorite display.

You can modify the print settings if necessary.

Then click on the **Validate** button.

There are then two possible situations depending on whether or not you are using an SMTP server:

- either a messaging software sends the e-mail. This is the case in the ONE and ENTERPRISE versions (if the SMTP server is not configured).
- or an SMTP server sends the e-mail. This functions only in the ENTERPRISE VERSION and only if the SMTP server has been configured.

**In the case of messaging software**

In the ONE and ENTERPRISE versions (if the SMTP server is not configured), each time you send e-mail, the messaging software window opens so you can:

- Fill or modify the different e-mail fields (subject, mail body, etc.)
- Validate sending.

**In the case of an SMTP server**

In ENTERPRISE version, if the SMTP server is configured, and e-mail is sent from a resource, a VISUAL PLANNING mailer opens automatically instead of the messaging software.
The sender’s e-mail address is the address of the user defined in the ADMIN CENTER.

### 3. SENDING AN E-MAIL FROM AN EVENT

VISUAL PLANNING enables you to send e-mails from an event or a selection of events. Depending on the version, this is done:

- Manually via a messaging software (ONE or ENTERPRISE version),
- Manually via an SMTP server (ENTERPRISE version only),
- Automatically via an SMTP server (ENTERPRISE version only),

These e-mails use predefined templates.

### Prerequisites

**Technical prerequisites**

A messaging software must be installed on the client workstation sending the e-mail.

This functionality has been validated for MICROSOFT OUTLOOK OFFICE 2007 and later.

The SMTP server must be accessible from the VISUAL PLANNING ENTERPRISE server when sending e-mails by SMTP and/or automatically.

**Functional pre-requisites**

To use this functionality you must create at least one template for sending e-mails.
However, for optimum use it is recommended to create in a form for the event using sending of e-mail:

- A heading called **VPMAIL**:
  - Text type,
  - Multi-line Text type,
  - or Boolean type.

The last type enables you to store the date and time the last e-mail was sent from each resource, as well as the sender’s login. In the case of Boolean headings, they are checked once the e-mail has been sent.

**Defining administrators**

An administrator of this functionality is a user who will be able to configure the templates for sending e-mails.

This administrator depends on the VISUAL PLANNING version.

**In the ONE version**

The ONE version only allows one user to access VISUAL PLANNING.

This user has the rights to configure templates for sending e-mails.

**In the ENTERPRISE version**

In the ENTERPRISE version, the VISUAL PLANNING administrator ("admin" user) can still configure the templates for sending e-mails.

In addition it is possible to configure other administrators for this functionality, i.e. users who will be able to configure templates for sending e-mails.

To do so, go to the Admin Center, then in the list of Modules, Right-click on E-Mail > Modify.

The following window opens:

Now choose the users who are administrators of the functionality.

You must then click the **Validate** button.
Configuring an e-mail template

You must configure at least one template for sending e-mails.

To do so, go to **Settings > Configuration Block > VPMail**.

The editing window opens. **Right-click on VPMail Templates > Create a VPMail template**

The right-hand pane is then enabled:
Now you should define the template's characteristics and click on **Validate** to confirm creation of the template.

**Name**

Give the template a name.

**Description**

Give the template a description. This data is optional.

**History**

This represents the creation date and time and the most recent change to the template, together with the login of the user who performed these actions.

This property is updated automatically.

**Content**

This is a free text zone which contains the body of the message.

You can insert one or more planner entities into this text:

- **Dimension** or **form headings**,
- **Valuation items**,
- Event attributes (including history),
- The global variables "$USERNAME" and "$USERFULLNAME",
- The parent event’s variables if the e-mail is sent from a child event.
HTML Format

Check this box to generate the e-mail in HTML format.

Join attached files

If Attachment type headings exist, it is possible to attach them to the e-mail as attachments.

The Attachment type headings that will be associated with the e-mail are those of the event’s dimensions or the dimensions of its form.

Recipients

Choose the text or multi-line headings that contains the recipient’s e-mail address.

These headings can contain several addresses separated by a semi-colon. In the case of a multi-line type of heading, if the e-mail addresses are separated by line returns, they will be replaced by “;”.

Send an invitation

Check this box to send an invitation to the message’s recipients.

They will then be able to save the invitation in their messaging software and send an answer to the e-mail’s sending address, but they will not be able to suggest other dates modifying those in VISUAL PLANNING.

Subject

This is a free text zone which contains the subject of the message.
You can insert one or more planner entities into this text:

- Headings for dimension and/or form headings,
- Values of the selected event,
- Valuation items,
- The global variables $USERNAME$ and $USERFULLNAME$,
- The parent event’s variables if the e-mail is sent from a child event.

**Events filter**
Define the event filter that will determine whether or not it is possible to use the template to e-mail the selected event.

Only events complying with this filter can use the template.

**Mark the sending**
Check this box to save the date and time the e-mail was sent, and the login of the user who sent it.

**Open mailer**
Check this box to see the mailer, integrated into VISUAL PLANNING, before the e-mail is sent.

If several events are selected, a mailer opens for each selected event.

**Sender hidden copy**
This setting is only available if the SMTP server has been configured.
This is only useful for automatic sending of e-mails.

**Event creation/modification**
Check this box to enable triggering of the context during creation and/or modification of events.

**Enabled**
This setting is only available if the SMTP server has been configured.
This is only useful for automatic sending of e-mails.

**Sender e-mail address**
This setting is only available if the SMTP server has been configured.
This is only useful for automatic sending of e-mails.

**Triggers**
This setting is only available if the SMTP server has been configured.
This is only useful for automatic sending of e-mails.

Configuring the SMTP server

SMTP server

The SMTP server is configured in the Admin Center.

In the list of modules, right-click on Mail > Modify > Settings.

The following window opens:

You must then enter the SMTP server settings:

- **MAIL.receiveProtocol**: Define the protocol (imap or pop3),
- **MAIL.receiveServer**: Address of incoming account server (pw entered in the Admin center > External access settings),
- **MAIL.receiveSSL**: to enable or disable SSL reception,
- **SMTP.password**: the SMTP account password,
- **SMTP.port**: the SMTP server port,
- **SMTP.server**: the SMTP server name,
- **SMTP.SSL**: send via SSL or not,
- **SMTP.TLS**: send via TLS or not,
- **SMTP.user**: SMTP account name: this can be an e-mail address.

**Sender**

You must define the sender’s e-mail address.

The sender is the VISUAL PLANNING user.

To do so, go to the Admin Center, then in the *Users* section, **Right-click on the user > Modify**.

- Enter the user’s *E-mail address*,
- and finally **Validate**.

**Manual sending of e-mail**

**Choosing the template**

To send an e-mail, **Right-click on one or more events > Send an e-mail**.

There are several possibilities:

- If no template corresponds to the event that must be sent, nothing happens and the e-mail is not sent,
- If one template corresponds to the event that must be sent, sending of the e-mail begins.
- If several e-mail templates correspond to the event that must be sent, the user is given the choice of which template to use.

Select the template to use to e-mail the event, then click on **Validate**.

**Sending e-mail**

There are two possible situations depending on whether or not you are using an SMTP server:

- If the SMTP server is not configured, a messaging software will be used to send the e-mail. This is the case in the ONE and ENTERPRISE versions (if the SMTP server is not configured).
- If the SMTP server is configured, it sends the e-mail. This functions only in the ENTERPRISE VERSION and only if the SMTP server has been configured.

**In the case of messaging software**

In the ONE and ENTERPRISE versions (if the SMTP server is not configured), the messaging software window opens so you can:

- Fill or modify the different e-mail fields (subject, e-mail body, etc.)
- Validate sending.

**In the case of an SMTP server**

In ENTERPRISE version, if the SMTP server is configured the e-mail is send directly from VISUAL PLANNING, without opening a messaging software.

If the **Open Mailer** option is checked, the following window appears before the e-mail is sent, filled in according to the settings of the chosen template:

![Email window]

The sender's e-mail address is:
■ either the user defined in the Admin Center if the e-mail is sent manually,
■ or the address defined in the e-mail’s context if the e-mail is sent automatically.

Event marking
If the e-mail template uses the functionality to mark sending of the e-mail, the history and name of the e-mail’s context are stored in the sent event:
■ in a form heading called **VPMAIL**, if it exists. (see Functional pre-requisites above).
■ in the events note if this heading does not exist.

Automatic sending of e-mail

Configuration
Configuration consists of three settings:
■ configuration of the SMTP server,
■ configuration of triggering of contexts for sending e-mails,
■ management of the automation service (see below).

Management of the automation service

Enabling of the service in the planner
In the Admin Center, right-click on the relevant planner > Modify.
Check the option Enable 'Send mail'.

Starting and stopping the service
In the Admin Center, right-click on the "Send Mail" service then:
■ Start service to start the service,
■ Stop the service to stop the service. A stopped service is grayed.
Automatic start

You can define whether the sending service is started when the VISUAL PLANNING server opens or restarts.

To do so, **right-click on the “Send Mail” service > Modify.**

In the window that is displayed, check the **Automatic start** box.

Sending e-mail

Use of hierarchies is transparent on the planner.

For each e-mail sending template that has at least one trigger, all the events corresponding to the filter defined in the template are sent.

The only action visible in the planner is therefore marking of the sending history in the event, if it has been enabled.

The sender’s e-mail address is the address defined in the e-mail’s context if the e-mail is sent automatically.

Event marking

If the e-mail template uses the functionality to mark sending of the e-mail, the history and name of the e-mail’s context are stored in the sent event:

- in a form heading called **VPMAIL**, if it exists. (see Functional pre-requisites above).
- in the events note if this heading does not exist.
Chapter V. VPPublipost mail merge

1. DEFINITION

The VPPUBLIPOST mail merge module enables you to generate one or more documents:

- in WORD format (.DOC,.DOCX) if the template used is a Word document,
- in PDF format if the template used is a Pentaho document,
- in *.PRPT format if the PENTAHO application is used.

The documents are generated using one or more events. You can generate as many documents as there are selected events. You can also generate a single document for several selected events.

Using Word

In this case, the mail merge uses a WORD template and a database made up of fields (the information to be retrieved from VISUAL PLANNING).

In concrete terms the tool functions using the same principles as the Microsoft Word mail merge functionality:

With a document template in *.DOC or *.DOCX format, (this template must include the mail merge fields, see Configuration) as well as a data source: one or more VISUAL PLANNING events.

Using Pentaho

In this case, the mail merge is managed in a tool separate from VISUAL PLANNING - Pentaho Report Designer - but still using the fields present in VISUAL PLANNING.

The mail merge uses a PRPT template.

2. PREREQUISITES

Technical prerequisites

The VPPUBLIPOST mail merge functionality was developed and validated for:

- VISUAL PLANNING ENTERPRISE,
- Microsoft Word 2003, 2007 and 2010. It requires a version of Microsoft WORD including VISUAL BASIC FOR APPLICATIONS (VBA),
- PENTAHO REPORT DESIGNER version 5.4 maximum.
Functional pre-requisites

The VPPUBLIPOST mail merge functionality requires at least one VPPUBLIPOST template to be defined in VISUAL PLANNING.

3. CONFIGURATION

Creating a mail merge template

Before starting to configure Mail Merge on VISUAL PLANNING, you must create a WORD or PENTAHO destination document. This template must contain the empty spaces that VISUAL PLANNING will fill as necessary.

The settings of the VPPublipost module can be accessed from the module configuration window.

Go to the Settings tab > Configuration Block > Click on VPPublipost

In the window that is displayed, right-click on VPPublipost Templates > Create a Mail Merge template.

The corresponding part is then enabled:
Specify the characteristics of the feed context, then confirm by clicking on the Validate button.

The following characteristics must be entered:

**Name**
Give this template a name.

**Description**
Give a description of this mail merge template. This data is optional.

**History**
This represents the creation date and time and the most recent change to the template, together with the login of the user who performed these actions.

This property is updated automatically.

**Attach the result to the headings**
This enables you to choose an Attachment type of form heading to which the mail merge result will be attached.
For each mail merge, the result is attached to this heading. If it accepts several attached files, the results of the most recently generated mail merges will be conserved. The most recent appears at the top of the list.

In the case of Pentaho, the heading must be in file download.

If no heading is defined, a window asking you to open the generated files will be displayed after the mail merge.

Events filter

Choose the event filter that will determine whether or not it is possible to use the created mail merge template (see Use). Only events complying with this filter can use the template.

Properties to publish

This functionality limits the number of data items that will be available in the merge fields when entering values originating from VISUAL PLANNING.

If no properties are published, all the VISUAL PLANNING data will be sent and can be used as merge fields.

Backup directory

If the mail merge result is not attached to a heading, or if the Attachment heading selected above is local, define a directory where all the edited mail merges will be saved.

This directory must be accessible for all users.

Attributes that define the path

If the mail merge result is not attached to a heading or if the Attachment heading selected above is local, you can specify the tree structure of directories where the mail merge result is saved, thanks to the dimension headings.

Each selected attribute will constitute a folder in the backup directory.

Application

This field enables you to choose the source of the mail merge template: MS Word or Pentaho Report.

Single destination file

This functionality will enable you to generate a single document for all the source data used.
In other words, if you check this box, instead of obtaining a document for each event, VISUAL PLANNING generates a single document for all the selected events.

**Save as PDF**

To specify that the result must be generated in the PDF format.

It is only operational for Word 2010 and Word 2007 with an add-on.

**Timestamp**

Check this box to add a yyyymmdd_hhmmss suffix at the end of the file when it is generated.

**Mail merge template file**

To select the mail merge template file using the button : 

Two situations may arise, depending on the origin of the mail merge template.

**Using MSWord**

If the mail merge template is from MS Word, you should click this button .

This starts Word and enables you to enter the values from the planner which will be used for the mail merge. When you save the Word file after defining your mail merge, the following dialog is displayed:

To take account of the new definition, you must of course answer yes.

**Using Pentaho**

If the mail merge template is from Pentaho, you will enter the values from the planner directly in the Pentaho tool in VISUAL PLANNING.

However, it is possible to download the file by clicking on the button .

Once the mail merge context has been configured you must export it in XML format by right-clicking on it:
Then, in the Pentaho tool, you must add the XML file exported from VISUAL PLANNING by clicking on Data > Add Datasource > XML:

The following window opens:
Click on the button to choose the XML file exported from VISUAL PLANNING, and then on the icon to add a value.

Finally add the /*/* value in the note field right at the bottom:

Now click on OK or Preview to verify that the data is accessible.

Make the required modifications and matching operations on Pentaho and save your PRPT file.
Once your file has been saved on Pentaho, you must return to the mail merge template to attach the .prpt file to it by clicking on this button.

To learn more about how to use the Pentaho software, see Pentaho

**Event creation/modification**

In a situation where you choose to store the file generated by the mail merge in an attachment type of form heading, it is possible to generate mail merge documents automatically by checking the Event creation/modification box.

A mail merged file will be generated and stored in the form heading whenever an event is created or modified.

For this to take place, the files in the attachment type of heading must be downloaded.

**Modifying a mail merge template**

To modify an existing template, go to the Settings menu > Configuration block > RSS Feed, then Click on the template to modify.

The corresponding part is then enabled. Modify the settings (see Creating a mail merge template), then click on Validate to save any modifications.

**Deleting a mail merge template**

To delete a template, go to the Settings menu > Configuration block > RSS Feed, then Right-click on the template to modify.

The following message appears:

![Confirmation dialog](image)

Click on:

- **Yes**, to definitively delete the context,
- **No** to cancel the deletion.
4. USE

To use the mail merge template, right-click on one or more events, then click on **Mail Merge** in the pop-up menu.

There are two possible options:

- If no template corresponds to the event, then it is not possible to click on **Mail Merge**.
- If one or more templates do correspond to the event, then it is possible to choose from the proposed list.

A message is displayed offering to open the generated document(s).
Chapter VI. VPWhatsUp

1. DEFINITION

The VPWhatsUP module enables users of the same planner to discuss and share information about resources and events.

When a discussion is created, only users authorized to view the discussions will be able to participate.

- The admin user will be able to see all the VPWhatsUP discussions created.

2. CONFIGURATION

All of a planner’s users can create VPWhatsUP discussions and interact.

Creating a VPWhatsUP discussion

- Click on the button located top right of the planner.

The following window appears:
In the window that is displayed, click on the button top right.
You can now define the characteristics of the discussion which consist of:

**Name**

Give this new discussion a name.

**Description**

Give the discussion a description. This data is optional.

**History**

This represents the creation date and time and the most recent change to the Discussion, together with the login of the user who performed these actions.

This property is updated automatically.
Specifics

Select the planner users to be included in the discussion.

They will then be able to participate.

It is not possible to create several discussions with the same users.

Modifying a discussion

To modify a discussion, Click on the discussion > Click on the button 🖋️ to display the configuration window.

Modify the discussion parameters (see Creating a discussion) and click on the Validate button to validate the modifications.

Deleting a discussion

To delete a discussion, Click on the discussion > Click on the button 🗑️ to delete the discussion.

The discussion is deleted immediately. There is no warning window before deletion.

3. USE

Visualization

On the rich client

When you are logged into the planner, to see a discussion click on this button 📌 to see the discussions. Those who have unread discussions are displayed in italics.
If several discussions have been created, they will be represented below each other.

An open discussion window does not prevent you from browsing the planner.

On VPPORTAL

When you are logged into VPPORTAL, to see a discussion click on this button to see the discussions. Those who have unread discussions have a little red dot indicating the number of unread lines.
If several discussions have been created, they will be represented below each other.

An open discussion window does not prevent you from browsing VPPORTAL.

On VPGO

When you are logged into the planner, to see a discussion click on this button to see the discussions. Those who have unread discussions are displayed in italics.
If several discussions have been created, they will be represented below each other.

An open discussion window does not prevent you from browsing the planner.

New items in a discussion

If new items have been added by other users, the icon located top right will be displayed as follows:

- On the rich client:

- On VPPORTAL:
■ On VPGO:

The items sent will be displayed with the user’s full name and login as well as the date (or the time when the item was sent if it is the current date).

When opening the planning, the missed messages will also be notified in the same way.

Entering a text

You can type in unrestricted text in a discussion. To do so, go to the writing window, enter your text and validate by clicking on the Send button.

Share a resource via the discussion

The links to a resource are only available on the rich client.

You can share the properties of a resource via the discussion. To do so, go to a Resources view or a Schedule view.

1. Drag the resource row to the zone for attaching files in the discussion window. The attached file will then be positioned in the bottom part of the window. To send it, write an accompanying text in the writing zone and click on the Send button,

2. Simply click on the link to open the resource editor.
Share an event via the discussion

The links to an event are only available on the rich client.

You can share the properties of an event via the discussion. To do so, go to a representative of the events (except on the Events Map view).

1. Drag the resource row to the zone for attaching files in the discussion window. The attached file will then be positioned in the bottom part of the window. To send it, write an accompanying text in the writing zone and click on the **Send** button,

2. Simply click on the link to open the event.
Discussion history

The discussion history is conserved for 12 sliding hours, or when the VISUAL PLANNING application server starts up.
Chapter VII. Web Calendars

1. DEFINITION

The Web Calendars Module is an additional application enabling you to distribute a list of events synchronously:

- either for each resource: in the case of the individual diary,
- or for a set of resources: in the case of a team diary.

The module makes available an URL giving access to a *.ICS file.

The standard used for *.ICS files is the iCalendar V2 standard.

To improve readability, from now on we will call the processed ICAL entities “Meetings”.

The Web Calendars module is an optional feature. If this option is not taken up, the corresponding menus will not be visible in VISUAL PLANNING.

2. TECHNICAL PREREQUISITES

The Web Calendars Module was developed and validated for:

- VISUAL PLANNING ENTERPRISE,
- ICAL, version 2 or later.

3. INSTALLATION

A license number is required in order to install this module.

To obtain a license number for the Web Calendars module, contact the sales department:

- by telephone on +33 (0) 1 47 29 99 69
- or by e-mail at commercial@stilog.com

To install the module go to the ADMIN CENTER > Modules > Right-click on ICAL > Save the license.

Follow the instructions.
The number of licenses you have acquired corresponds to the number of URLs you can use. 

*E.g.: if you have 10 ICAL licenses, the first 10 URLs used will take the 10 licenses.*

### 4. CONFIGURATION

Each ICAL context is attached to a dimension.

To configure you must define the ICAL contexts to distribute.

**Creating a publication**

Go to **Settings > Configuration block**, click on **Web Calendars**.

The editing window opens.

Right-click on **Web Calendars > Create a Web Calendar > Choose the dimension.**
The corresponding part is then enabled:
Specify the characteristics of the context, then confirm by clicking on the Validate button.

The following characteristics must be entered:

**Name**

Give the publication context a name.

**Description**

Give a description explaining the purpose of this flow. This data is optional.

**History**

This represents the creation date and time and the most recent change to the context, together with the login of the user who performed these actions.

This property is updated automatically.

**Enabled**

Check or uncheck the box to respectively enable or disable the flow context.
Display short names

Check this box to display the names of dimensions to which the headings to display belong, or the names of the VISUAL PLANNING entities.

Example: Start Day: 11/24/2015 or Name: MARTIN

One calendar for each resource

This box:

- enables you to publish one URL for each resource in the filter below if it is checked,
- enables you to publish one URL for all the resources in the filter below if it is not checked.

Categories

If necessary, choose from the headings and other event attributes the item or items that will define the Meeting category.

This category must be the same as the category in your calendar. Otherwise, there will be a category without a color.

Content

Choose from the headings and other event attributes the item or items that will define the Meeting content.

Position

Choose from the headings and other event attributes the item or items that will define the Meeting position.

This position will be displayed in the calendar Location attribute.

Meeting manager

Choose from the headings and other event attributes the item or items that will define the Meeting manager.

This meeting manager will be visible in Planning mode and does not have to be an e-mail address.
Participants
Choose from the headings and other event attributes the item or items that will define the Meeting participants.

This meeting manager will be visible in Planning mode and does not have to be an e-mail address.

Subject
Choose from the headings and other event attributes the item or items that will define the Meeting subject.

Events filter
This filter defines the events to which the publication context applies.
You can:
- select an existing filter,
- or create a custom filter specific to the publication context. To do this, select Customized.

The Meetings available in the *.ICS file correspond to the events visible via the two events and resources filters.

Resource filter
This filter defines the resources to which the publication context applies.
You can:
- select an existing filter,
- or create a custom filter specific to the publication context. To do this, select Customized.

The Meetings available in the *.ICS file correspond to the events visible via the two events and resources filters.

Intersect the period
The period defines the events to which the publication context applies. (See Time period)

Modifying a publication
To modify an existing web calendar, go to the Settings menu > Configuration block > Web Calendars, then Click on the context to modify.
The corresponding part is then enabled. Modify the settings (see Creation of a web calendar), then click on Validate to save any modifications.

**Deleting a publication**

To delete an existing web calendar, go to the Settings menu > Configuration block > Web Calendars, then Click on the context to delete.

The following message appears:

![Confirmation dialog](image)

Click:

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

**5. USE**

**Displaying the URL**

To display the distributing URL, Right-click on the publication > Display the URL.

There are two possible situations depending on whether the One calendar for each resource box is checked or not:

- one URL for all the resources,

![URL field](image)

- one URL per resource.
In both cases, it is possible to copy-paste the URL or URLs to distribute them to users.

Reading the calendar

Numerous applications can read *.ICS files, including:

- MICROSOFT OUTLOOK 2007 and later: [https://support.office.com/fr-fr/article/utiliser-le-calendrier-dans-outlook-com-8cdf8a5e-de9a-4468-9225-8611c8c8c7b0](https://support.office.com/fr-fr/article/utiliser-le-calendrier-dans-outlook-com-8cdf8a5e-de9a-4468-9225-8611c8c8c7b0)
- GOOGLE CALENDAR: [https://support.google.com/calendar/answer/37100?co=GENIE.Platform%3DDesktop&hl=fr](https://support.google.com/calendar/answer/37100?co=GENIE.Platform%3DDesktop&hl=fr)