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Chapter I. DEFINITION

The VPORTAL module is an additional VISUAL PLANNING web client making it possible to consult and modify your planners using the web browser on a computer (PC, Apple Mac, Tablet, etc.) or from a mobile terminal (mobile phone, smartphone, PDA, etc.).

It consists of:

- a configuration interface accessible from VISUAL PLANNING (definition of visible and modifiable information),
- the user interface accessible from a computer or mobile terminal via an URL.

The VPORTAL module is an optional feature. If this option is not taken up, the corresponding menus will not be visible in VISUAL PLANNING.
Chapter II. TECHNICAL PREREQUISITES

The VPORTAL module was validated for VISUAL PLANNING ENTERPRISE.

It requires a PC terminal (PC, Apple Mac, Tablet, etc.) or mobile terminal (GSM phone, PDA, Netbook, etc.) connected to Internet and including an HTML 5-compatible browser.

VPORTAL has been tested and validated on the following browsers:

- PC: Edge 20+, Internet Explorer 9+, CHROME 21+, FIREFOX 38+, OPERA 15+, OS X SAFARI 6.2.6+,
- Tablet/Mobile phone: IOS 8+, Android 4.4+.

This module requires a VISUAL PLANNING installation with external access (public IP).

See VPORTAL Pre-requisites
Chapter III. INSTALLATION

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

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

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

The module is installed from the Admin Center, Modules menu, Right-click on VPPORTAL > Save License > Named or Floating depending on the situation.
Chapter IV. DEFINITION OF USERS

1. Users

Once it has been installed, VPPORTAL licenses are managed in the same way as VISUAL PLANNING licenses.

■ You must link the license up with the logins of users who are going to use VPPORTAL.

■ The user permissions defined in the ADMIN CENTER determine which information is visible and modifiable for VPPORTAL uses.

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

2. Administrators

Only users identified as “administrators” have access to VPPORTAL module configuration.

After saving the license, you must define the VISUAL PLANNING users who are administrators of the VPPORTAL module from the Admin Center, Modules menu, Right-click on VPPORTAL > Modify > Administrators. Select the users.

The planner “administrators” also have access to configuration of the VPPORTAL module.
Chapter V. CONFIGURATION

The VPORTAL module is configured in the VISUAL PLANNING rich client.

Five types of VPORTAL templates can be created, and each template is attached to a dimension.

You can define as many VPORTAL templates as you need based on the five existing template types:

- Diary template,
- Planner template,
- Events list template,
- Resources list template,
- Events report template.

Each template is associated with a dimension.

1. SETTINGS

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

Go to Settings > Configuration pane > Click VPPortal.

In the window that appears, click the Settings button at the bottom left. The following window appears:
Description

The description is optional.

If a description is entered, it will be displayed as the global module description in VPPORTAL.

It is possible to use the following variables specific to VISUAL PLANNING: $USERNAME, $USERFULLNAME, $USEREMAIL. These variables automatically insert the login, the dimension identification headings and the email address of the user who is logged in respectively.

Display menu on the left

Check this box to display the VPPORTAL template tabs on the left of the screen. By default these tabs are positioned at the top of the home page.
Login dimension

By default, users of the VPPORTAL module have to be declared in the VPPORTAL module license. (See Definition of users)

However, access to the VPPORTAL module can also be defined via a dimension of the planner. In this case, enter the name of the dimension enabling this access here.

The following fields are then accessible:

![Editing interface](image)

**Allowed user filter**

Define the filter authorizing access to the VPPORTAL module. For example, an "Active User" filter only gives access to the module to users included in the filter.
Permission group heading

Choose the heading identifying each user's permission group. This heading must be a list-type heading allowing either single or multiple choices. The different choices must be entered in the same way as the permission groups in Admin Center.

The users' permissions will then be the permissions defined for the permission group in Admin Center.

Identification heading

Choose the heading that will enable the user to identify themselves (i.e. the login) on VPPORTAL. This heading must be a text-type heading.

Password heading

Choose the heading that will verify the user's password. This heading must be a password-type heading.

Email heading

If necessary, choose the heading for retrieving the user's email address. This heading must be a text-type heading.

User profile headings

This field enables the user's profile headings to be selected. The headings that can be selected here are the headings of the login dimension.

The user can then edit the selected headings once they have logged onto VPPORTAL by clicking on the corresponding button. When the mouse is positioned over each profile heading, a tooltip will present its description if it has one.

Terms of use heading

Choose the heading that will confirm whether the user has checked the terms of use. This heading must be a boolean-type heading.

Terms of use text

The text that will be displayed asking the user to accept the terms of use should be entered into this field.

In VPPORTAL, the terms of use are always accessible by pressing this button.

2. CHANGING THE PASSWORD

If the users are defined via a login dimension, the user can change their password:
Click on the button **Change password** to display the following window.

---

### 3. TAB ORDER

The tab order can be changed. To do this, drag the tabs in the VPPORTAL configuration tree. The first tab will be the first VPPORTAL template in the configuration tree.
4. CREATING A VPPORTAL TEMPLATE

Creating a Diary template

Go to Settings > Configuration pane > Click on VPPortal.

To create a VPPORTAL Diary template, Right-click VPPortal Templates > Create a Diary > Choose the dimension or click the button and choose the dimension.

The pane below is enabled:
Specify the characteristics of the Diary template, then confirm by clicking on the Validate button.

The following characteristics must be entered:

**Name**

Give the template a name.
Description
Give the template a description. If a description is entered, it will appear in the tab header in VPORTAL.

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.

Enabled
If this box is checked, the template is enabled and made available to VPORTAL users.

Start time
Define time when day display starts

End time
Define time when day display ends.

Display Period
Choose from the pull-down list the default display period when the template opens.
The different choices are: Daily, Week, Worked week and Monthly.

Displayable periods
Select in the list the period(s) the user can choose in the template.

Dimension filter
This filter defines the resources to which the template applies.
It is possible:
- to select an existing filter;
- or to create a custom filter specific to the template. To do this, select Customized.

Choice of Dimensions
If this box is checked, it activates a pull-down menu containing the list of resources.

Main data items
Choose the event headings and/or attributes that will identify events.
This data will be displayed in the time bars.

**Separator**
Choose the character that separates identification details when the event is presented.

**Icon**
Choose the dimension that defines the icon in the event time bar.

**Border color**
Choose the dimension that defines the event border color.

**Background color**
Choose the dimension(s) that define(s) the event background color.

If several dimensions are selected, the event bar will show the dimension colors.

If only one dimension defines the background color and it is shaded, it will also be visible in the time bar.

**Description data**
The data will be displayed in the tooltip.

Choose the event headings and/or attributes that will describe events. The wording that will be displayed can be modified.
**Events height**

Choose the height of the time bar for events in pixels.

**Creation hierarchies**

Choose the event creation hierarchy/ies as well as the editors to display for each event created with this/these hierarchies.

If no hierarchy is chosen, it will not be possible to create events in this template.

**Input editor**

Choose the input editor to display for the template’s events.

If the chosen value is "**Automatic**", the editor to display will be the editor that has a filter corresponding to the event from the list of input editors defined for VPPORTAL.

**Authorize duplication**

If this box is checked, the duplication button is displayed when editing an event. Duplication will only be possible if a hierarchy has been selected above.

**Events filters**

Choose the filters that will be available in the template from the list of existing events filters.

**Period**

Choose the period when events are visible.
**Display extra events**

Select the resource-type headings of the template dimension for which events should be displayed.

**Linked event filter**

Choose the events filters for the dependent resources selected above.

It is possible:

- to select an existing filter;
- or to create a custom filter specific to the template.

**Creating a Planner template**

Go to **Settings > Configuration pane > Click on VPPortal**.

To create a VPGPORTAL Planner template, **Right-click VPPortal Templates > Create a Planner**.

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

The pane below is enabled:
Specify the characteristics of the *Planner* template, then confirm by clicking on the **Validate** button.

The following characteristics must be entered:

**Name**

Give the template a name.
Description
Give the template a description. If a description is entered, it will appear in the tab header in VPPORTAL.

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.

Enabled
If this box is checked, the template is enabled and made available to VPPORTAL users.

Start time
Define time when day display starts

End time
Define time when day display ends.

Display Period
Choose from the pull-down list the default display period when the template opens.
The different choices are: Monthly, Week and Worked Week.

Displayable periods
Select in the list the period(s) the user can choose in the template.

Display halfday
Check this box to differentiate half-days visually.

Dimension filters
This filter defines the resources to which the template applies.
It is possible:
- to select an existing filter;
- or to create a custom filter specific to the template.

Identification headings
Choose from the headings of the selected dimension the headings that will appear in the left-hand part
of the planner.
Separator
Choose the character that separates identification data in resources.

Main data items
Choose the event headings and/or attributes that will identify events.
This data will be displayed in the time bars.

Separator
Choose the character that separates identification details when the event is presented.

Icon
Choose the dimension that defines the icon in the event time bar.

Icon size
Choose the size of icons from 16 to 64 pixels.

Border color
Choose the dimension that defines the event border color.

Background color
Choose the dimension(s) that define(s) the event background color.
If several dimensions are selected, the event bar will show the dimension colors.
If only one dimension defines the background color and it is shaded, it will also be visible in the time bar.

Description data
The data will be displayed in the tooltip.
Choose the event headings and/or attributes that will describe events. The wording that will be displayed can be modified.
Events height

Choose the height of the time bar for events in pixels.

Creation hierarchies

Choose the event creation hierarchy/ies as well as the editors to display for each event created with this/these hierarchies.
If no hierarchy is chosen, it will not be possible to create events in this template.

**Input editor**

Choose the input editor to display for the template’s events.

If the chosen value is "**Automatic**", the editor to display will be the editor that has a filter corresponding to the event from the list of input editors defined for VPPORTAL.

**Authorize duplication**

If this box is checked, the duplication button is displayed when editing an event.

Duplication will only be possible if a hierarchy has been selected above.

**Events filters**

Choose the filters that will be available in the template from the list of existing events filters.

**Period**

Choose the period when events are visible.

**Display extra events**

Select the resource-type headings of the template dimension for which events should be displayed.

**Linked event filter**

Choose the events filters for the dependent resources selected above.
It is possible:

■ to select an existing filter;
■ or to create a custom filter specific to the template.

**Workloads**

Choose the workloads to display in the template, as well as the type of display.

**Creating an Events List template**

Go to **Settings > Configuration pane > Click on VPPortal.**

To create a VPPORTAL Events List template, **right-click VPPortal Templates > Create an Events List > choose the dimension** or click the button and choose the dimension.

The pane below is enabled:
Specify the characteristics of the *Events List* template and confirm by clicking **OK**.

The following characteristics must be entered:
**Name**

Give the template a name.

**Description**

Give the template a description. If a description is entered, it will appear in the tab header in VPPORTAL.

**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.

**Enabled**

If this box is checked, the template is enabled and made available to VPPORTAL users.

**Display Type**

Use this checkbox to choose whether events are displayed in a Table or in Details mode.

**Auto Format text**

This option is only available in *Details* mode.

Check this box to display the names of VISUAL PLANNING attributes and entities in the template.

**HTML descriptor**

This option is only available in *Details* mode if the *Auto Format Text* box is not checked.

Right-clicking brings up an HTML editor.
This makes it possible to create your own visuals for the template’s events:

- By entering formatted or unformatted text,
- By inserting images, tables and event attributes.

**Description data**

This option is enabled if the *Auto Format Text* box is not checked.

Choose the event headings and/or attributes that will describe events. The wording that will be displayed can be modified.
Number of rows per page
Define the maximum number of event rows that will appear on one page in VPPORTAL.

Group by heading
Select the heading that will be used to group the data. The order can be ascending or descending.

Sort by heading
Select the heading that will be used to sort the data. The order can be ascending or descending.

Icon
Choose the dimension that defines the icon in the event time bar.

Icon size
Choose the size of icons. from 16 to 64 pixels.

Background color
Choose the dimension(s) that define(s) the event background color.
If several dimensions are selected, the event bar will show the dimension colors.
If only one dimension defines the background color and it is shaded, it will also be visible in the time bar.

**Dimension filter**

This filter defines the resources to which the template applies.

It is possible:

- to select an existing filter;
- or to create a custom filter specific to the template.

**Choice of Dimensions**

If this box is checked, it activates a pull-down menu containing the list of resources.

**Creation hierarchies**

Choose the event creation hierarchy/ies as well as the editors to display for each event created with this/these hierarchies.

If no hierarchy is chosen, it will not be possible to create events in this template.

**Input editor**

Choose the input editor to display for the template’s events.

If the chosen value is "**Automatic**", the editor to display will be the editor that has a filter corresponding to the event from the list of input editors defined for VPPORTAL.
Authorize duplication
If this box is checked, the duplication button is displayed when editing an event.
Duplication will only be possible if a hierarchy has been selected above.

Events filters
Choose the filters that will be available in the template from the list of existing events filters.

Period
Choose the period when events are visible.

Creating a Resources List template
Go to Settings > Configuration pane > Click on VPPortal.
To create a VPPORTAL Resources List template, right-click VPPortal Templates > Create a Resources List > choose the dimension or click the button and choose the dimension.
The pane below is enabled:
Specify the characteristics of the Resources List template and confirm by clicking **OK**.

The following characteristics must be entered:
Name
Give the template a name.

Description
Give the template a description. If a description is entered, it will appear in the tab header in VPPORTAL.

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.

Enabled
If this box is checked, the template is enabled and made available to VPPORTAL users.

Display Type
Use this checkbox to choose whether resources are displayed in a Table or in Details mode.

Auto Format text
This option is only available in Details mode.
Check this box to display the names of VISUAL PLANNING attributes and entities in the template.

HTML descriptor
This option is only available in Details mode if the Auto Format Text box is not checked.
Right-clicking brings up an HTML editor.
This makes it possible to create your own visuals for the template's resources:

- By entering formatted or unformatted text,
- By inserting images, tables and resource attributes.

**Description data**

This option is enabled if the *Auto Format Text* box is not checked.

Choose the headings and/or attributes that will describe resources. The wording that will be displayed can be modified.
**Number of rows per page**
Define the maximum number of resource rows that will appear on one page in VPPORTAL.

**Group by heading**
Select the heading that will be used to group the data. The order can be ascending or descending.

**Sort by heading**
Select the heading that will be used to sort the data. The order can be ascending or descending.

**Display icon**
If this box is checked, the resources' icons are displayed.

**Icon size**
Choose the size of icons. from 16 to 64 pixels.

**Row color**
The color of the resource row can be selected by choosing the resource color or the color of one of the calculated headings with thresholds for the resource.

The color will appear to the left of the resource row.
**Dimension filter**

Choose the filters that will be available in the template from the list of existing resource filters.

**Creation input editor**

Choose the input editor to display when creating a resource.

**Input editor**

Choose the input editor to display when editing a resource.

If the chosen value is "**Automatic**", the displayed editor will be the editor that has a filter corresponding to the resource from the list of input editors defined for VPPORTAL.

**Creating an Events Report template**

Go to Settings > Configuration pane > Click on VPPortal.

To create a VPPORTAL Events Report template, right-click VPPortal Templates > Create an Events Report > choose the dimension or click the button and choose the dimension.

The pane below is enabled:
Specify the characteristics of the *Events Report* template and confirm by clicking **OK**.

The following characteristics must be entered:

**Name**

Give the template a name.

**Description**

Give the template a description. If a description is entered, it will appear in the tab header in VPPORTAL.

**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.

**Enabled**

If this box is checked, the template is enabled and made available to VPPORTAL users.
Events Report

Choose the events reports to display as well as their type of display and the wording to give to each events report.

5. MODIFYING A VPORTAL TEMPLATE

To modify a VPORTAL template, go to the General Settings menu > VPORTAL > Select the template to modify. The corresponding window is enabled.

Modify the characteristics, then click on the Validate button to save the template.

See Creating a template

6. DELETING A VPORTAL TEMPLATE

To delete a VPORTAL template, go to the General Settings menu > VPORTAL > Right-click on the template to delete > Delete.

The following screen appears:
Click on Yes to delete the template.

7. INPUT EDITORS

It is now possible to create custom editors for resources and events.

It will now be possible to have different editors for each event in the same context, or to specify a single editor for all the events in the same context, by choosing your preferred input editor in the VPPORTAL context or leaving it on **Automatic** so that the custom editors are displayed according to the filters defined in them.

**Events Editors**

Go to **Settings > Configuration pane > Click on VPPortal**.

To create a **VPPORTAL Events Editor**, **right-click on Events Editors** > or click the button ![Add](image) take care to click on Events Editor first.

The pane below is enabled:

![Event Input Editor](image)

Specify the characteristics of the **Events Editor** and confirm by clicking **OK**.
The following characteristics must be entered:

**Name**

Give the editor a Name.

**Description**

Give the editor a Description.

**History**

This represents the creation date and time and the most recent change to the Editor, together with the login of the user who made the change.

This property is updated automatically.

**Enabled**

If this box is checked, the editor is enabled and made available to VPPORTAL users.

**Events Filter**

From the existing events filters, choose the filter that will define the list of events this editor can open.

**Enable Custom Editor**

Check this box to customize the events editor complying with the above filter.

**Custom Editor**

This option can only be used if the Enable Custom Editor box is checked.

Right-clicking brings up an HTML editor.
This makes it possible to create your own visuals for the template’s events:

- By entering formatted or unformatted text,
- By inserting images, tables and event attributes.

**Editable data**

This option is only available if the *Enable Custom Editor* box is not checked.

Choose the data to display when editing events.
To be able to edit a resource of a given dimension in an event, the identification headings of *Dimension* type must be displayed in the list of available entities.

**Resources Editors**

Go to *Settings > Configuration pane > Click on VPPortal*.

To create a *VPPORTAL Resources Editor*, *right-click on Resources Editors > Choose the dimension* or *click the button* taking care to *click on Resources Editor first*.

The pane below is enabled:
Specify the characteristics of the Resources Editor and confirm by clicking Validate.

The following characteristics must be entered:

**Name**

Give the template a name.

**Description**

Give the template a description. If a description is entered, it will appear in the tab header in VPPORTAL.

**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.

**Enabled**

If this box is checked, the template is enabled and made available to VPPORTAL users.
Dimension filter

Choose the filters that will be available in the template from the list of existing resource filters.

Enable Custom Editor

Check this box to customize the resources editor complying with the above filter.

Custom Editor

This option can only be used if the Enable Custom Editor box is checked.

Right-clicking brings up an HTML editor.

This makes it possible to create your own visuals for the template’s resources:

- By entering formatted or unformatted text,
- By inserting images, tables and resource attributes.

Editable data

This option is only available if the Enable Custom Editor box is not checked.

Choose the data to display when editing events.
To be able to edit a resource of a given dimension in an event, the identification headings of *Dimension* type must be displayed in the list of available entities.
Chapter VI. USE

1. ACCESS TO VPPORTAL

To access VPPORTAL from a computer, type the following URL in your browser: http://vp_server_name/vplanning/web

where vp_server_name is the name of the server where VISUAL PLANNING is installed.

2. VPPORTAL LANGUAGE

The user interface language is the language of the VISUAL PLANNING server.

3. LOGGING IN/OUT

The planner name, user name and password are the same as those used to log into VISUAL PLANNING (if identification via a planner dimension is not enabled). (See Settings)

You can log out at any time by clicking on Log Out.

4. CHOOSING A TEMPLATE

When VPPORTAL is launched, an existing template can be selected by clicking on the corresponding tab.
5. USING A DIARY TEMPLATE

Consulting a Diary

The Diary enables you to see the events arranged in a diary over a given period of time.

Information about the events are displayed on the time bar.

More detailed information is displayed in the tooltip. The event’s start and end dates are also displayed by default in the tooltip.

The type of information displayed is determined by the configuration.

Several options are possible in a Diary.

**Time Period**

You can modify the viewed time period by clicking on the following button:

![Time Period Options]

The Diary Template can be organized:

- by month,
- by week,
- by worked week,
- by day.
These different time periods are displayed if they have been selected in the configuration process.

**Browsing the calendar**

You can browse the calendar using the arrows by clicking on the date.

![Calendar Image]

**Show night hours**

In the week, worked week and day displays, it is possible to show or hide the night-time hours by clicking on the corresponding button at the bottom of the screen.

**Events filters**

If events filters have been selected in the “Events filter” field during configuration, they will appear in a pull-down list enabling you to filter the events displayed in the diary.

**Resources filters**

If the "Choice of Dimensions" box was checked during configuration, events can be filtered by only displaying events from the resource selected in the pull-down list.
Search

The events displayed can be filtered by carrying out a search. Filtering can:

- Filter the displayed events,
- Filter on the displayed properties and identification headings;
- Condition: Contains.

Headings and properties that are not visible in the diary are not taken into account for verification of the filter condition.

View of the diary

<table>
<thead>
<tr>
<th>Month</th>
<th>Day</th>
</tr>
</thead>
<tbody>
<tr>
<td>This view displays all the days of a month. Special days are shown in the color of the defined period type.</td>
<td>This view displays all the hours of a day. Special days are shown in the color of the defined period type.</td>
</tr>
</tbody>
</table>
This view displays all the days of a week. Special days are shown in the color of the defined period type.

This view displays all the worked days of a week. Special days are shown in the color of the defined period type.

Export to PDF

You can export the data displayed in the diary into PDF format. This creates a PDF file in a position the user chooses.

Editing an event

Clicking on an event opens the editing window. (See Input editors)

The data displayed for an event can be edited if the user has the required permissions.

For a given dimension, resources can be modified if the Dimension entity is displayed in the event.
There are 4 possible options:

- Click on **Duplicate** to duplicate the event if the option has been enabled (see [Authorize duplication](#));
- Click on **Validate** to save the changes,
- Click on **Cancel** to leave the event as it is.
- Click on **Delete** to delete the event. The following screen appears:

  ![Delete Event Screen](image)

  **Do you want to delete this event?**

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

### Creating an event

It will only be possible to create an event if at least one hierarchy was selected during configuration.
To create an event:

- **Click** on the Add 'Hierarchy_name' button;
- or **Select** the start and end date of the event to be created on the diary.

![ADD 'ACTIVITY'](image)

If several creation hierarchies are possible, choose one of them in the following window:

![Creating an event](image)

The resources for the obligatory dimensions of the selected hierarchy must be chosen on the following screen:

- **Choice of dimension(s)**

![Select a resource (Employee, PTO)](image)

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

Click on the **Validate** button to continue creating the event. Enter the event's properties on the next window:

- **Choice of the event’s headings and attributes which will be displayed when editing the event.**
Then:

- confirm creation of the event by pressing the **Validate** button,
- or cancel it by pressing the **Cancel** button.

### 6. USING A PLANNER TEMPLATE

**Consulting a Planner**

The Planner shows you all the events in a Schedule View. Information about the events is displayed on the time bar.

More detailed information is displayed in the tooltip. The event’s start and end dates are also displayed by default in the tooltip.

The type of information displayed is determined by the [configuration](#).

Several options are possible in a Planner.

#### Time Period

You can modify the viewed time period by clicking on the following button:

![Time Period Buttons](#)

The **Planner** template can be organized:

- by month,
- by week,
by worked week,

These different time periods are displayed if they have been selected in the configuration process.

Browsing the calendar

You can browse the calendar using the arrows by clicking on the date.

Events filters

If events filters have been selected in the “Events filter” field during configuration, they will appear in a pull-down list enabling you to filter the events displayed in the planner.

Resources filters

If the "Choice of Dimensions" box was checked during configuration, events can be filtered by only displaying events from the resource selected in the pull-down list.
Search

The events displayed can be filtered. Filtering can:

- Filter the displayed events,
- Filter on the displayed properties and identification headings;
- Condition: Contains.

Search:

Headings and properties that are not visible in the schedule view are not taken into account for verification of the filter condition.

View by month

This view shows the schedule for a full month. Special days are shown in the color of the defined period type.
View by week

This view displays the schedule for all the days of a week.

View by worked week

This view displays the schedule for all the worked days of a week.
Workloads

If workloads were selected during configuration, they will be displayed at the bottom of the page.

Export to PDF

You can export the data displayed in the schedule view into PDF format. This creates a PDF file in a position the user chooses.

Editing an event

Clicking on an event opens the editing window. (See Input editors)

The data displayed for an event can be edited if the user has the required permissions.

For a given dimension, resources can be modified if the Dimension entity is displayed in the event.
There are 4 possible options:

- Click on **Duplicate** to duplicate the event if the option has been enabled (see **Authorize duplication**);
- Click on **Validate** to save the changes,
- Click on **Cancel** to leave the event as it is.
- Click on **Delete** to delete the event. The following screen appears:

![Delete Event Screen]

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

**Creating an event**

It will only be possible to create an event if at least one hierarchy was selected during configuration.

To create an event:

- **Click** on the **Add 'Hierarchy_name'** button;
- or **Select** the start and end date of the event to be created on the diary.
If several creation hierarchies are possible, choose one of them in the following window:

![Creating an event](image)

The resources for the obligatory dimensions of the selected hierarchy must be chosen on the following screen:

- **Choice of dimension(s)**

![Select a resource (Employee, PTO)](image)

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

Click on the **Validate** button to continue creating the event. Enter the event's properties on the next window:

- **Choice of the event’s headings and attributes which will be displayed when editing the event.**

![Base editor - level 3](image)
Then:

- confirm creation of the event by pressing the **Validate** button,
- or cancel it by pressing the **Cancel** button.

7. USING AN EVENTS LIST TEMPLATE

Consulting an events list

The list of events shows the events in the form of a list.

Each event is identified by the characteristics described during configuration.

![Events list template](image)

When the events list is displayed, more detailed information can be viewed for each event by clicking on the button to the left of the row for each event in **Table** mode or by clicking on the event in **Details** mode.

**Events filters**

If events filters have been selected in the “Events filter” field during configuration, they will appear in a pull-down list enabling you to filter the events displayed in the list.
Resources filters

If the "Choice of Dimensions" box was checked during configuration, events can be filtered by only displaying events from the resource selected in the pull-down list.

Search

The events displayed can be filtered by carrying out a search. Filtering can:

- Filter the displayed events,
- Filter based on headings and the properties displayed,
- Condition: Contains.

Headings and properties that are not visible in the list are not taken into account for verification of the filter condition.

Go forwards or back in the event list

On the bar at the bottom of the view, the arrows to the left of the bar are used to move forwards or back page by page to display the previous or next list of events.
Refresh the screen

On the bar at the bottom of the view, the button (arrow) in the bottom right corner refreshes the screen.

Tree mode

If a heading has been selected during configuration, the events will be grouped according to this heading.

Export to PDF

You can export the data displayed in the list into PDF format. This creates a PDF file in a position the user chooses.

This functionality is only available in Table mode.

Editing an event

Click on the button in Table mode or on the event in Details mode to open the editing window.

The data displayed for an event can be edited if the user has the required permissions.

For a given dimension, resources can be modified if the Dimension entity is displayed in the event.

There are 4 possible options:

- Click on Duplicate to duplicate the event if the option has been enabled (see Authorize duplication);
Click on **Validate** to save the changes,
■ Click on **Cancel** to leave the event as it is.
■ Click on **Delete** to delete the event. The following screen appears:

```
Do you want to delete this event?
```

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

**Creating an event**

It will only be possible to create an event if at least one hierarchy was selected during configuration.

To create an event, **Click on the Add 'Hierarchy_name'** button.

If several creation hierarchies are possible, choose one of them in the following window:

```
Creating an event

JOBS   PTO

```

The resources for the obligatory dimensions of the selected hierarchy must be chosen on the following screen:

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

Click on the Validate button to continue creating the event. Enter the event's properties on the next window:

- Choice of the event’s headings and attributes which will be displayed when editing the event.

Then:

- confirm creation of the event by pressing the Validate button,
- or cancel it by pressing the Cancel button.

8. USING AN RESOURCE LIST TEMPLATE

Consulting a resource list

The list of resources shows the resources in the form of a list.
Each resource is identified by the characteristics described during configuration.

When the resources list is displayed, more detailed information can be viewed for each resource by clicking on the button to the left of the row for each resource in Table mode or by clicking on the row in Details mode.

If a color has been defined for resources, the color will be displayed as the background to the Modify button for each resource.

**Search**

The resources displayed can be filtered. Filtering can:

- Filter the resources displayed,
- Filter the headings displayed,
- Condition: Contains.

Note that headings that are not visible in the template are not taken into account for verification of the filter condition.

**Go forwards or back in the resources list**

On the bar at the bottom of the view, the arrows to the left of the bar are used to move forwards or back page by page to display the previous or next list of resources.
Refresh the screen

On the bar at the bottom of the view, the button (arrow) in the bottom right corner refreshes the screen.

Tree mode

If a heading has been selected during configuration, the resources will be grouped according to this heading.

Export to PDF

You can export the data displayed in the list into PDF format. This creates a PDF file in a position the user chooses.

---

This functionality is only available in Table mode.

---

Editing a resource

Click on the button in Table mode or on the resource in Details mode to open the editing window. The headings displayed can be edited if the user has the required permissions.
There are 3 possible options:

- Click on **Validate** to save the changes,
- Click on **Cancel** to leave the resource as it is.
- Click on **Delete** to delete the resource. The following screen appears:

```
Do you want to delete this resource?

OK   Cancel
```

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

**Creating a resource**

To create a resource, **Click** on the button for adding a resource.
The resource creation window chosen in the creation editor during configuration is displayed:

Then:
- confirm creation of the resource by clicking on the **Validate** button,
- or cancel it by pressing the **Cancel** button.

**In the case of the “Attachment” heading**

**Display = File list**

If the heading is displayed, pressing the link opens the file. The heading must be loaded on the server and be of type **File list**.
**Display = Image album**

If the heading is displayed, the image corresponding to the resource is displayed. The heading must be loaded on the server, have only one file and be of type **Image album**.

### 9. USING AN EVENTS REPORT TEMPLATE

Event reports can be displayed in VPORTAL.

To do so you must choose an events report context.

In the context definition you can include as many events reports as you like. You must also choose the type of events report display.

### 10. SPECIAL CASES

**Workloads**

You can display the workloads in VPPORTAL.

To do so, in the VPPORTAL planner context select in the configuration window the workloads to display and the type of display you want.
Managing child events

You can create a Diary template, Events List or Planner of child events in the case of a vertical hierarchy. The events can then be modified if the hierarchy allows. Child events can also be displayed in their parents’ editors.

It is then possible to create, modify or delete children from this editor.
Attachment heading

Display = File list

If the heading is displayed, pressing the link opens the file. The heading must be loaded on the server and be of type **File list**.

Display = Image album

If the heading is displayed, the image corresponding to the resource is displayed. The heading must be loaded on the server, have only one file and be of type **Image album**.