

BLUE CHAMELEON : General Tools

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December 19, 2013

Chapter 7

General Tools

In this Chapter, the use of the various helpful tools we provided Blue Chameleon with will be explicated.

All commands explained in this section are accessible from the  command group.

7.1 News

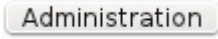

In order to broadcast miscellaneous company-related news to users, Blue Chameleon has designed a news tool that, upon login, permits user to be noticed of anything happening, as well as, should it be needed, publishing her/his own news to inform the user community about particular events that may happen.



News access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

[Menu script user rights :] News

7.1.1 The rights to access news and to publish news to user groups

In order to avoid news delivering to recipients that would not be interested by them, a news user possesses publishing rights for every user group that exists, being able to publish or not to users belonging to a given user group. As displayed in Fig.7.1, these rights can be set for every news user thanks to the  button found from .

News / Administration :

News - Publishing rights

News user : admin

Publication to usergroup :

Accounting Yes No

Administrator Yes No

Customer Support Group Yes No

External Relations Yes No

Sales Department Yes No

Figure 7.1: Setting admin's rights to send news to every user group.

7.1.2 Creating news

News creating is achieved via **News / Publish / Add news** (Fig.7.2). A title has to be filled in as well the news' text. Once **Next** is clicked on, a list of user groups displays : these are the user groups to which the publishing user is authorized to send news to, as set above. Amongst a given user group, only the users who have access to news will be displayed and thus sent news to.

News / Publish / Add news :

Title : Warning !

Comments : Electricians will be working on mains this afternoon, so there's quite a risk of power failure. Please save your work every once in a while.

Send to :

- Accounting(Jane; Mary)
- Administrator(admin)
- Customer Support Group(James; Karen)
- External Relations(Mary)
- Sales Department(Dick; Harry; Tom)

Figure 7.2: Writing a piece of news aimed to be sent to every user group.

Finally, clicking on will make this piece of news ready to be published.

7.1.3 Publishing news

Once created, news are published directly on next screen (displayed at Fig.7.3) by clicking on the [Publish](#) link. The same screen can be accessed later via . Before publishing, news can also be verified and, if needed, modified (in the same way as during their creation) thanks to the [View](#) link.




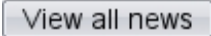
Figure 7.3: Publishing a recently-created piece of news.

7.1.4 Reading news

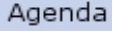
As illustrated by Fig.7.4, if the news Event Control has been setup (1.3) by the user, freshly published news will be displayed when logging in on Blue Chameleon, or when clicking on ; either way, unread news can be displayed by clicking on .



Figure 7.4: Two ways of seeing recently-published news.

The  button at the bottom of the page will mark the news as read. Once read, a piece of news can be accessed via .

7.2 Agenda

Blue Chameleon provides a built-in agenda designed to manage appointments with clients as well as other (customizable) types of scheduled activities ; the *Main Agenda Page* is accessed via .



Agenda access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

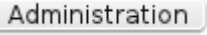
[Menu script user rights :] Agenda

7.2.1 Agenda setup guide

For an easier use of Blue Chameleon's agenda, it is advised to follow these operations to configure it :

1. creation of RV types (7.2.2.1) ;
2. creation of agendas (7.2.2.3) ;
3. editing of their styles (7.2.2.3.1) ;
4. assessing them RV types (7.2.2.3.2) ;
5. optionally, making group agendas gather individual agendas (7.2.2.3.3) ;
6. setting access rights for usergroups (7.2.2.4) and a default agenda per user (7.2.2.5).

7.2.2 Agenda administration

The agenda general configuration is done through the *Agenda Administration Page* (Fig.7.5), as accessed via the  button at the bottom of the *Main Agenda Page*.

7.2.2.1 Defining RV types

'RV types' is the general name to qualify the various activities that are filled in the agenda timetable. Each of them can be assessed their own color in order to distinguish between

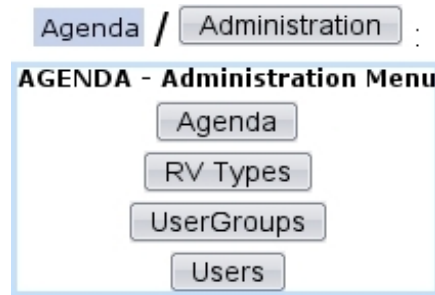


Figure 7.5: The *Agenda Administration Page*, with buttons designed to configure agenda display and rights.

them at a glance.

Creating a RV type is achieved via **RV Types**, as accessible from *Agenda Administration Page*. For instance the creation of a RV type called 'New Product Test' will be achieved in the way described at 7.6.

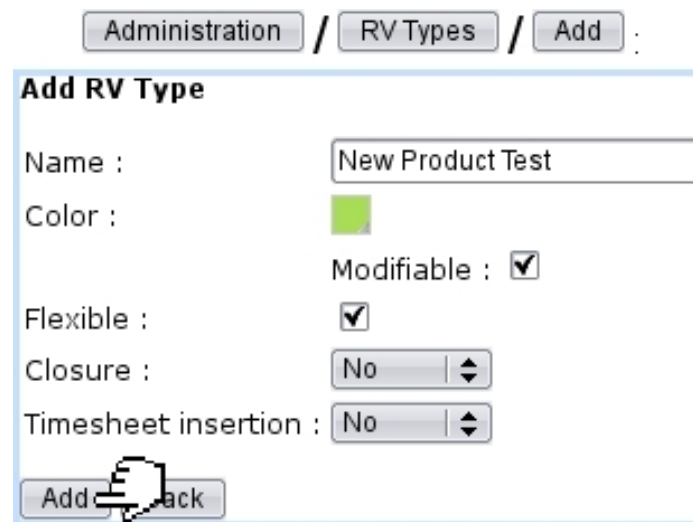


Figure 7.6: Creating a RV type called 'New Product Test'.

There, the following data (which will then shape the appointments created from this type) is inputted :

- a name for the RV type ;
- the color under which appointments of this type will appear on the Agenda (Fig.7.16) ; this color is picked through a dedicated tool (see Color Management below) ;
- whether it is flexible or not (7.2.3.4) ;
- whether the possibility is allowed to modify this (default) color when a specific appointment is modified (7.2.3.2) ;

- whether appointments of this type will have to be closed and will be inserted into Timesheets (7.2.3.6).

7.2.2.2 Color management

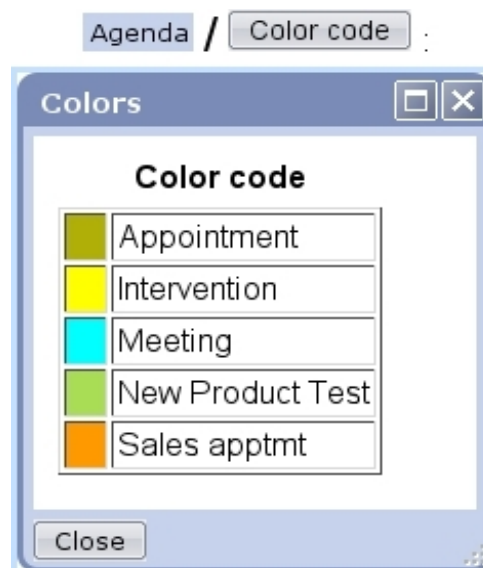
When a RV type is added as described above or when an appointment is edited (7.2.3.2), the color under which related appointment appears can be defined/updated in way shown at Fig.7.7.



Figure 7.7: Choosing a color.

There, a color can be picked amongst a predefined palette or entered as standard HEX code (in which case it is validated by pressing Return).

The colors that have been thus defined for type can afterwards be recalled on the *Main Agenda Page* through the **Color code** button :



7.2.2.3 Defining agendas for users or user groups

It is possible, through the **Agenda** button on the *Agenda Administration Page*, to define dedicated agendas to be used by specific users *or* usergroups. Fig.7.8 shows for instance the creation of an agenda aimed to be used by users of the 'Sales Department' user group.

The screenshot shows a web interface for agenda management. At the top, there are navigation buttons: 'Administration / Agenda / Add :'. Below this is a form titled 'Add agenda' with the following fields: 'Agenda name : Sales Dept. Agenda', 'User : <none>' (with a dropdown arrow), and 'User group : Sales Department' (with a dropdown arrow). Below the form are 'Add' and 'Back' buttons. A blue arrow points from the 'Add' button to the 'List of agendas' section below. The 'List of agendas' section contains a table with two rows: 'Admin' and 'Sales Dept. Agenda'. Each row has four buttons: 'Modify', 'Style', 'RV Types', and 'Groups'. At the bottom of the list is an 'Add' button.

Figure 7.8: Creating a agenda that will be used by user group 'Sales Department'.

Now, of course, the different users belonging to it (here, Tom, Dick and Harry) may surely different timetables and can define their own particular agendas picking this time from the 'User:' menu ; then, all of these particular agendas can be gathered into the 'Sales Dept. Agenda', described in details at 7.2.2.3.3.

The list of current agendas, as displayed after a click on **Agenda**, features possibilities to **Modify** any agenda in a similar way as during its creation (for that matter, name and/or user or user groups can be modified).

The **Style**, **RV Types** and **Groups** (this button only existing if agenda has been defined for a *user group*) buttons' functions are respectively cleared up at 7.2.2.3.1, 7.2.2.3.2 and 7.2.2.3.3 below.

7.2.2.3.1 Editing agenda style From the **Style** button as found at the agenda-listing page, the style for a specific agenda can be defined, as shown in Fig.7.9.

The options on this page decide for the following :

- whether appointments can be added in week-ends ;

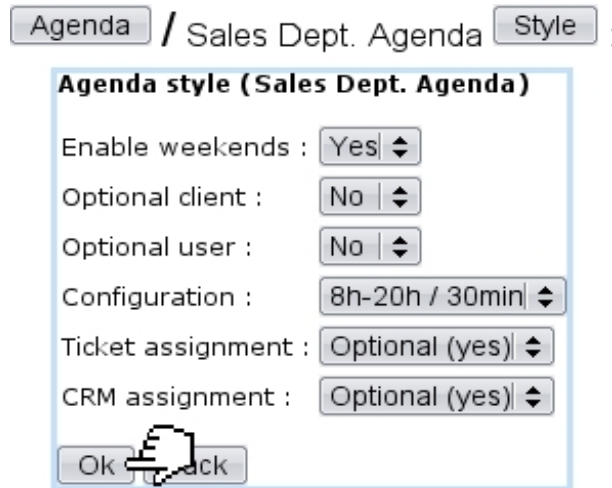


Figure 7.9: Defining the 'Sales Department' agenda style.

- if client/user can be optional for an appointment adding (7.2.3.1.1) ;
- the time configuration for the agenda display (0-24 hour span and 60 minute gaps, 8-18 hour span and 30/60 minute gaps, 8-20 hour span and 30 minute gap) ;
- whether an appointment adding creates a corresponding ticket (8) ;
- whether an appointment adding creates a corresponding Customer Relationship Manager action (7.9.4).

7.2.2.3.2 Assessing RV types to agenda Defined as described at 7.2.2.1, RV types must be added to an agenda in order to be used therein ; this is done through the **RV Types** button this time found at the list of current agendas (7.2.2.3).

As shown in Fig.7.10, the choice is then made between all the RV types that have not yet been added.

This way of doing (adding chosen RV types to agendas in order to be able to use them) ensures that each agenda has only its RV types of interest.

After being added, through the **Set as default** button, a RV type can then be pre-selected when agenda is used.

7.2.2.3.3 Groups of agendas Provided that an agenda has been defined as belonging to an user group (as in Fig.7.8), through **Groups**, it is possible to make it gather the agendas of certain users : Fig.7.11 shows for instance how the particular agendas of users Tom, Dick and Harry are added to the 'Sales Dept. Agenda' and the result of this on the *Main Agenda Page*.

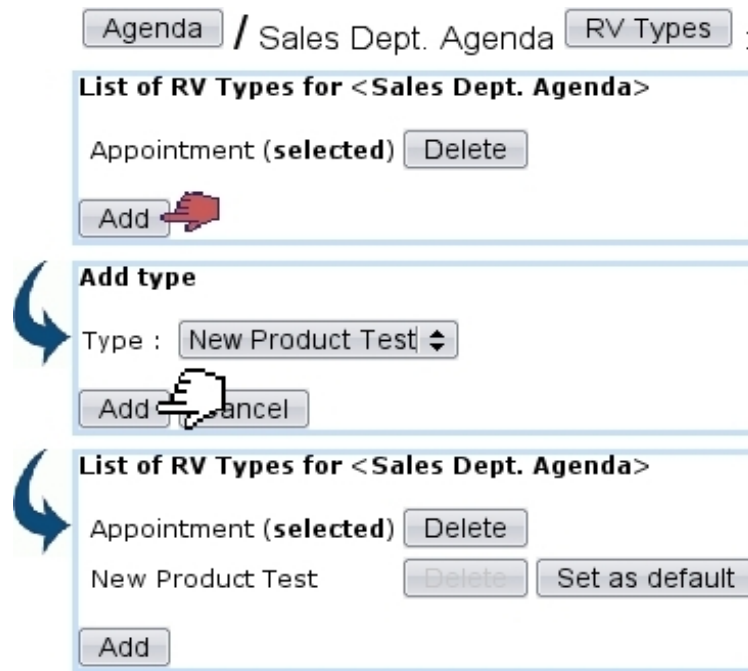


Figure 7.10: Adding the RV type 'New Product Testing' to the 'Sales Dept.' agenda.

7.2.2.4 Access rights for users groups

Members of a given user group must can be assessed rights (or none) to view, modify, create/delete/modify (or all of them) the agendas of all user groups.

This is done via the **User groups** button as accessible from the *Agenda Administration Page* ; on subsequent page, the user group which rights will be set is picked, and below, all existing agendas are listed.

Fig.7.12 shows for instance the settings for the 'Sales Department' user group : it is set to 'View' only for the 'Admin' agenda, but of course assessed 'Delete/Create/Modify' rights to its own agenda, the 'Sales Department' agenda.

According to the different roles and skills of user groups, their rights may be for instance set in order to be able to view the agendas of certain usergroups.

These agendas are picked and displayed on the *Main Agenda Page*.

7.2.2.5 Default agenda per user

A given user can be assessed a default agenda (provided that the user group s/he belongs to has sufficient rights to this agenda) via the last button on the *Agenda Administration Page*, **Users** . As shown on Fig.7.13, user is picked and her/his default agenda chosen.

This is the agenda that will be displayed when user arrives on the *Main Agenda Page*.

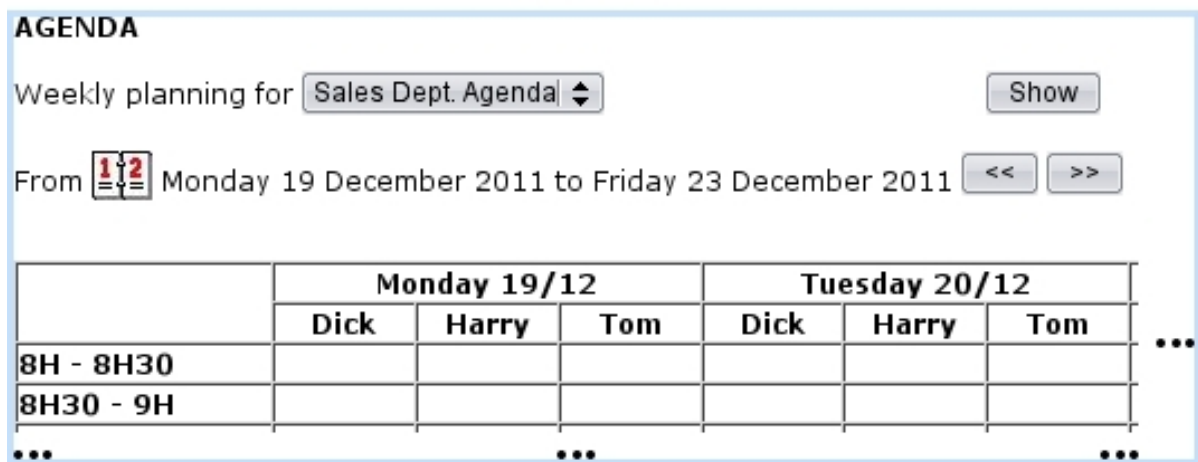
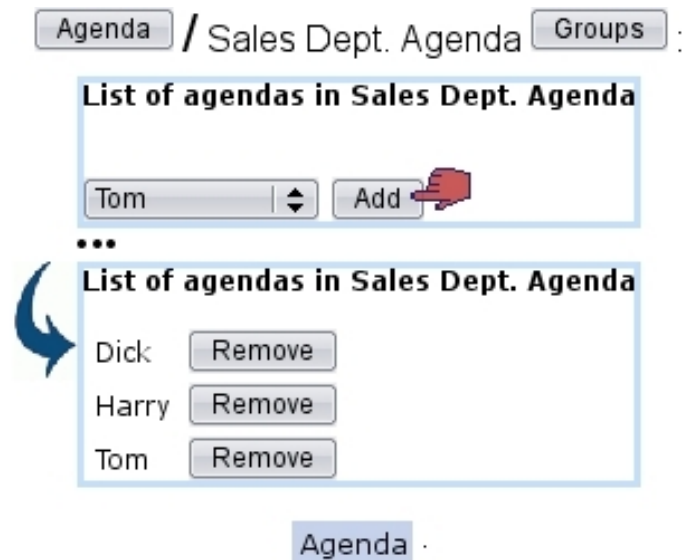


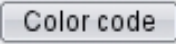
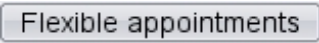
Figure 7.11: The own **agendas** of Tom, Dick and Harry are added into user-group-oriented 'Sales Dept. Agenda'; as a result, these three agendas are all featured when displaying the 'Sales Dept. Agenda'.

7.2.3 Agenda use

Upon arrival on the *Main Agenda Page* as displayed at Fig.7.14, a weekly calendar is displayed in the style specified at 7.2.2.3.1 : either running from Monday to Friday or Monday to Sunday, with the specified span of hours.

Week can be chosen by clicking on the  icon ; also, previous, next weeks are displayed via , .

Several buttons lie at the bottom of the page :

-  recalls in a pop-up which color corresponds to which RV type (7.2.2.2) ;
-  shows which of the week's appointments have been flagged as flexible (7.2.3.4) ;

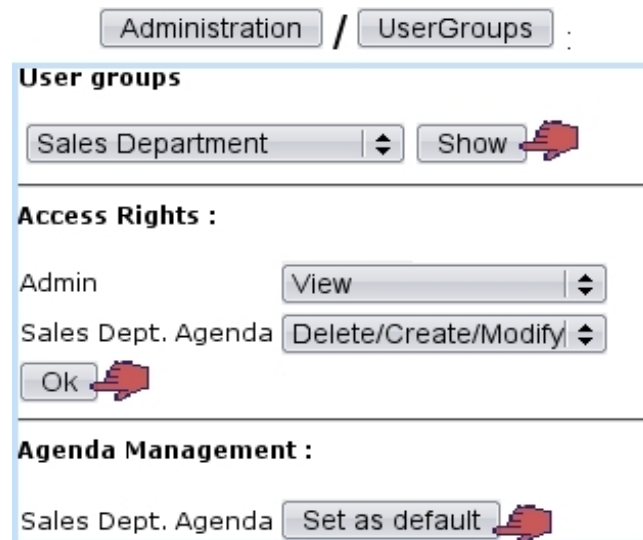


Figure 7.12: Setting the rights of a user group to agendas.



Figure 7.13: The 'Sales Department' agenda is set as Tom's default one.

- **Administration** accesses the eponymous page (7.2.2).

The list of agendas as accessible from the 'Weekly planning for' depends on the user group the current user belongs to, as set in the Agenda administration (7.2.2.4).

7.2.3.1 Adding an appointment

To add a new appointment, as featured in Fig.7.15, click on the intersection of the corresponding day and time. Most generally, an appointment is added for a client, but appointments for other things (7.2.3.1.1) can be added, too.

In case of a client appointment for instance, after a client search, general information upon the selected client is displayed, as well as the day and time of the appointment. The timelength can be modified, as well as the RV type to be chosen from the ones that have been assessed to the current agenda (7.2.2.3.2) ; a comment can also be added.

An alarm (7.3.4) specific to this appointment can be added by setting the 'Alarm :' menu to any other value than 'None' (in which case no alarm will be created).

If agenda style had been defined with 'optional user', s/he can be picked from the list of user belonging to this agenda's related user groups (7.2.2.3). Also according to agenda

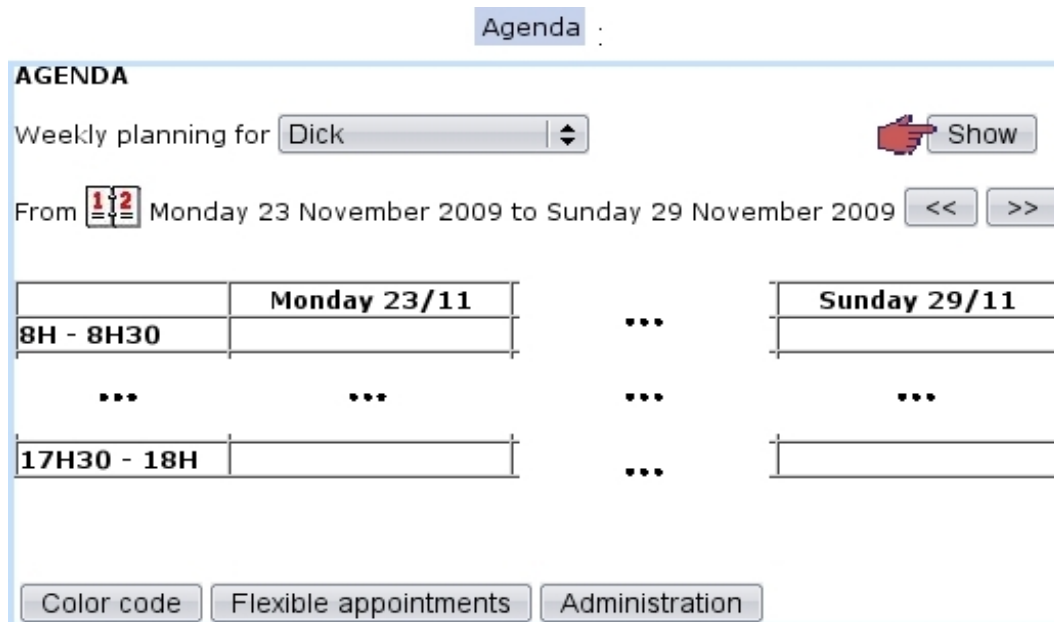


Figure 7.14: The *Main Agenda Page*.

style, tick boxes for ticket (8) and CRM action (7.9.4) assignments may be available.

The 'Flexible' checkbox serves as to flag this appointment as such, and thus being displayed in the pop-up as shown via **Flexible appointments** on the *Main Agenda Page*.

After validation, as shown on Fig.7.16 the *Main Agenda Page* displays the scheduled appointment with a color background as defined during the creation of the corresponding RV type (7.2.2.1).

Clicking on the appointment then leads to a similar page as the add one, with possibilities to modify RV type and comments ; changes are validated through the **Update** button.

7.2.3.1.1 Appointments for other objects - or none According to the choice made for the corresponding agenda style (7.2.2.3.1), a client can be mandatory or optional. In whichever case, an **Other object** button enables to add an appointment pertaining to an other object (Fig.7.17), for instance :

- prospects (7.9.3) ;
- other users...

Also, only if agenda style has optional client, a **No client** button is available to relate this new appointment to nothing in particular.

An example of an appointment for an other object (a user) is shown next.

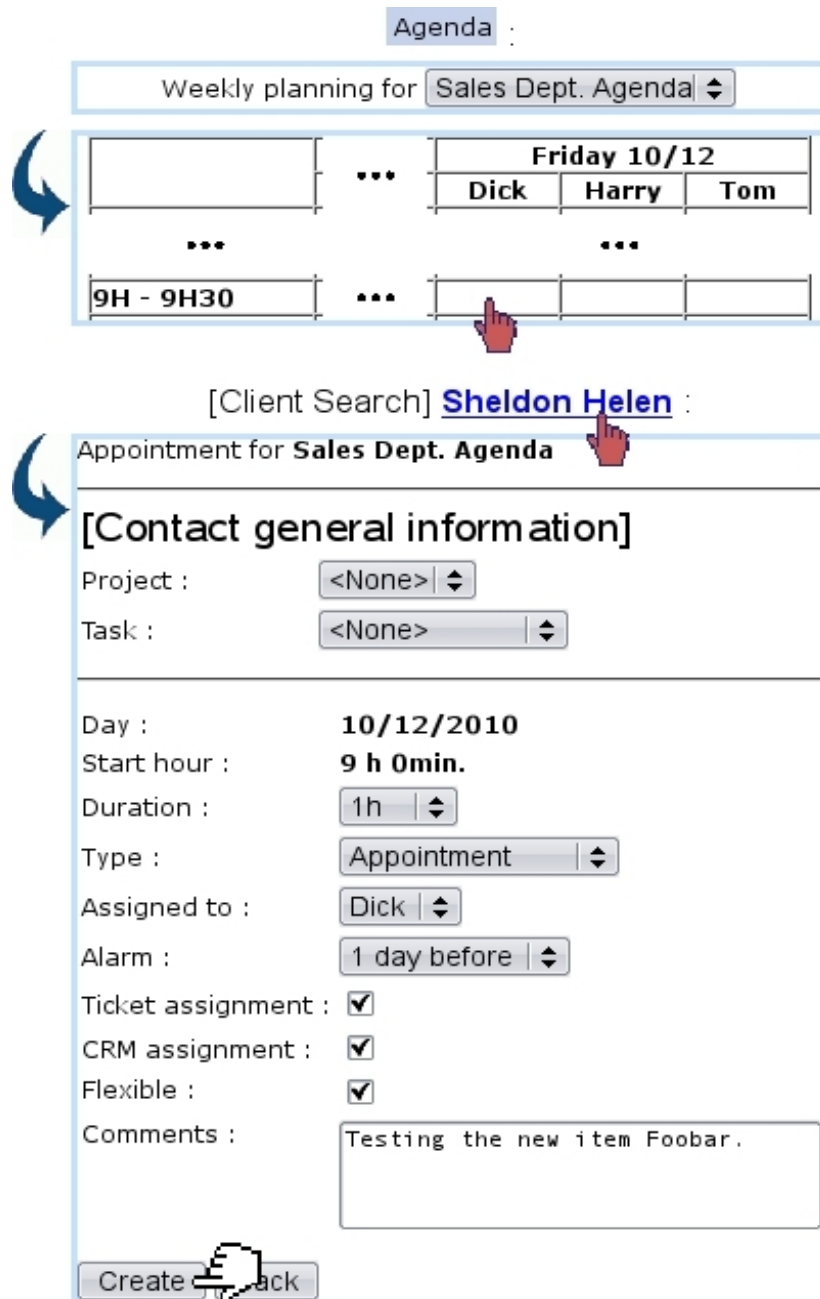


Figure 7.15: Adding an appointment for a client.

7.2.3.2 Modifying an appointment

After an appointment is created, it can be viewed (detail-wise) as well as modified by simply clicking on it. Then, as shown on Fig.7.18 (which by the way features an appointment made with another user), the following data can be modified :

- the type of appointment ;
- whether it is flexible (7.2.3.4) or not ;
- a 'Color : ' field which allows to modify the color (7.2.2.2) for this specific appoint-

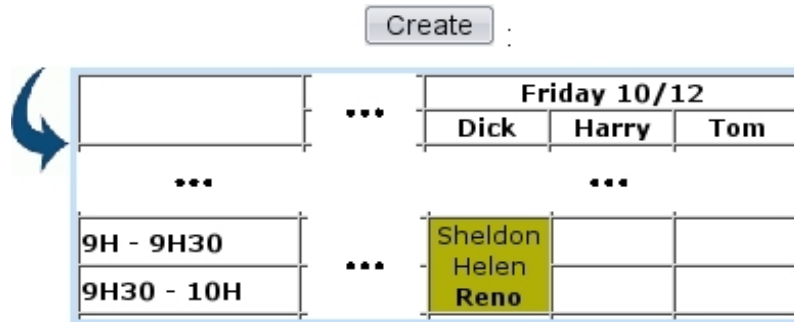


Figure 7.16: The now-scheduled appointment.

[On an Agenda which style is 'Client: optional'] :

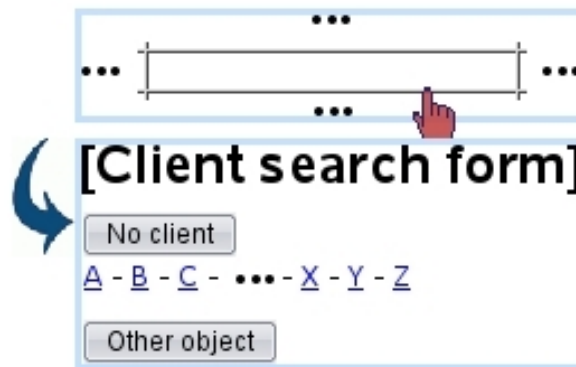


Figure 7.17: While the 'Other object' button is always available whatever agenda style is, the 'No client' one is only there if agenda style has optional client.

ment ; only appears for types that have 'Modifiable' checked ;

- whom this appointment is assigned to ;
- the comments.

On this screen, an alarm (7.3.4) for this appointment can also be added if it had not been during the creation of the appointment ; if it already exists, it can be modified, or removed by setting this menu to 'None'. These alarm operations will be done automatically.

Any change to validate is done so via the **Update** button. It is to note that, when type of appointment is changed, the flexible/modifiable color properties of the new type are shown immediately ; thus, 'Flexible' may go checked or unchecked, and the 'Color :' field may appear or disappear.

7.2.3.3 Moving or deleting an appointment

Once created, an appointment can be moved to another time slot by accessing the *Modify Appointment Page* (by clicking on this appointment) ; there, via a **Move** button at the bottom of the page, a calendar will be displayed again, where the new time slot will be

...

... **Thomas Hanson
(Sales Department)** ...

...

Planning - Appointment (156)

Appointment : **156**

Date : **5/5/2011**

Type : Meeting

When : **17 h 0min**

Duration : **60 min.**

Flexible :

Assigned to : admin View contact...

Opened by : **admin**

Color : ■

Alarm : 2 days before

User name : **Thomas Hanson (Sales Department)**

Ph. number : **555 0001**

Mobile :

Email : **tom.hanson@mailserv.com**

Comments :

Update Back Delete Move

Figure 7.18: Viewing an appointment's details, which some of those can be modified.

chosen similarly as for appointment adding. Finally, appointment move is achieved via Update.

On the other hand, should an appointment be simply deleted, this is achieved via the eponymous button, also available from the *Modify Appointment Page*.

7.2.3.4 Flexible appointments

Appointments in Blue Chameleon can be flagged as flexible or not by checking/unchecking the 'Flexible' checkbox while creating (7.2.3.1) or modifying (7.2.3.2) an appointment. When an appointment is flagged as not flexible, it will then appear with a * on the *Main Agenda Page* so that it can be distinguished from flexible ones. On this very page, a Flexible appointments button displays a pop-up where all flexible appointments for the week and the current user will be shown.

Flexibility, when an appointment is created, is inherited from the corresponding RV type (7.2.2.1).

7.2.3.5 Reminding appointments

Provided that the Agenda event control has been enabled (1.3), as featured on Fig.7.19, appointments will be reminded while at the **Home** page.

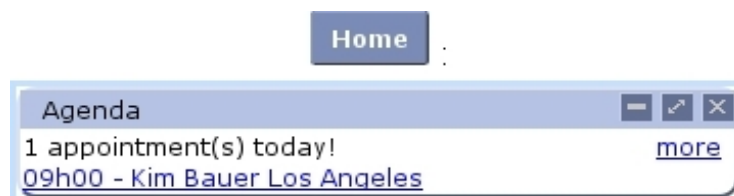


Figure 7.19: This appointment is imminent ; clicking on the [more](#) link will lead to the *Main Agenda Page* for the current week, while clicking on the link below "1 appointment(s) today !" will lead to the page for that very appointment.

7.2.3.6 Closure of appointments and insertion in Timesheets

[In Development]

7.3 Alarms

While using Blue Chameleon, a user might want to be remembered certain things in a timely matter ; for instance, anything related to things to be done before a certain date.

Blue Chameleon thus allows to set up custom alarms that will appear on user's desktop as an Event Control ; also, other objects such as Agenda appointments can also have an alarm set up so that they can be reminded before their due date.

The *Main Alarms Page* as described below is accessed via **Alarms**.



Alarms access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

[Menu script user rights :] Alarms

7.3.1 Setting an alarm

As featured on Fig.7.20, an alarm is easily set by entering a small text and the due date.

Add-ons / **Alarms** / **New alarm** :

New alarm

Comment : Buy new toners !

Due date :  Wednesday 27 July 2011 - 08:00

Figure 7.20: Setting a new alarm.

It then appears in a table, along with a link that allows to modify it :

Alarms :

Date	Object	Comment	
27/7/2011 08:00	Alarm	Buy new toners !	Modify

7.3.2 Modifying an alarm, turning it off

As shown on Fig.7.21, an alarm can be modified text- or date- wise ; it can also be turned off through the eponymous button, making it disappear from the alarm table.



Figure 7.21: Managing an alarm.

7.3.3 The Alarm Event Control

Provided that the Alarms event control (1.3) has been enabled, as featured on Fig.7.22, alarms will appear on the alarm's due date (in this example, on July 27), at the [Home](#) page, in the following way :

- before the alarm's due *time* (in the example 8:00 AM), it will appear normally (as a click-link to the page where this alarm can be modified/turned off) ;
- after the alarm's due time, it will blink, so as to emphasize it.



Figure 7.22: Alarms appear here on their due date.

The [Modify](#) on this box leads to the table of alarms.

7.3.4 Alarms for other objects

In the Agenda, as seen during appointment creation (7.2.3.1) or modification (7.2.3.2), an 'Alarm :' menu is used to **automatically** create an alarm reminding that appointment a *before* its due date and time.

For instance, if an appointment is set on July, 28 at 3 PM and has been set with a '1 day before' alarm, this alarm will appear on the alarm box on on July, 27 ; after 3PM on that day, it will be blinking. The following will be displayed :



Following that link will lead directly to the page where this appointment can be modified ; the alarm can then be turned off by setting to 'None' the 'Alarm' menu.

7.4 File manager



File manager access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

[Menu script user rights :] File manager

Blue Chameleon includes a File managing system that allows to manage folders and files in order to share them between all users, no matter how distant.

The *File Manager Page* is accessed via **File manager**. As featured on Fig.7.23, it shows a two-panel view, with on the left the list of folders and on the right the current directory as well as the list of files and/or folders underneath it.

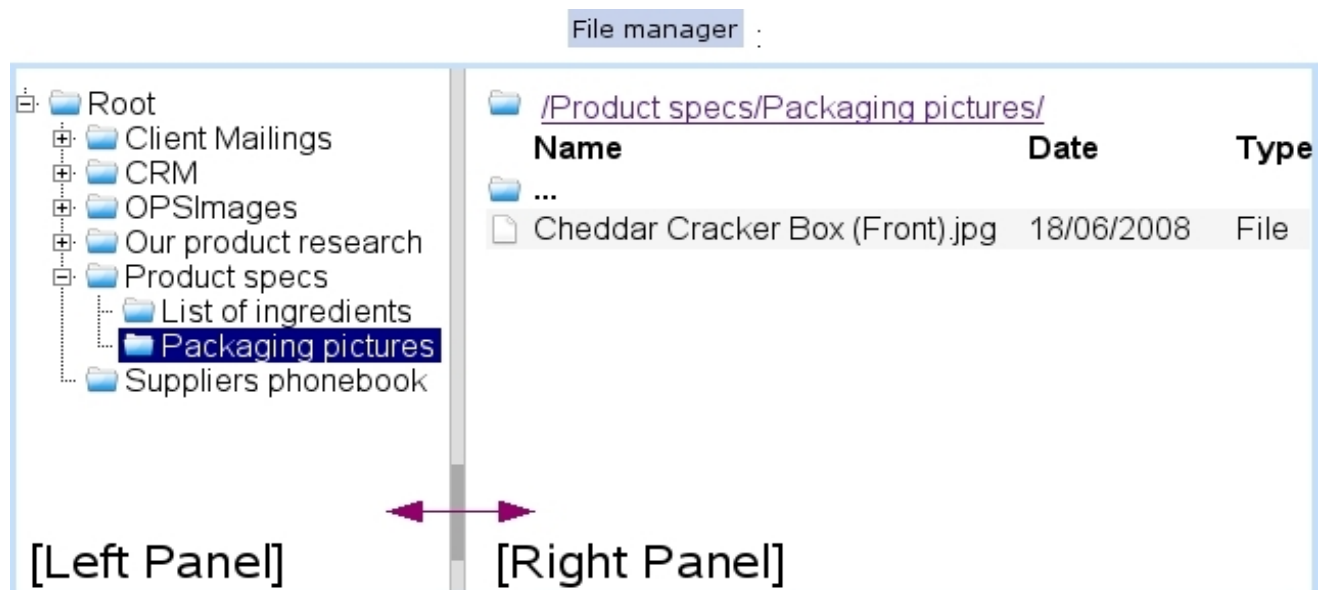





Figure 7.23: The *File Manager Page*.

Folders on the left panel can be expanded/reduced by clicking the / icons. There, a double click on the folder's name also serves as to expand/reduce it ; any click (whether single or double) displays the folder's contents on the right panel.

On the right panel, the contents of folders are accessed via a double click ; as for the  ... icon, it serves as, via a double-click, to display the contents of the parent directory.

7.4.1 Basic File Manager use

Blue Chameleon's file manager is straightforward to use, as described in the following.

7.4.1.1 Folder and file managing

As shown in Fig.7.24, to create a new folder in the current directory do a right-click on the right panel of the *File Manager Page* and then click on **Add folder**. Subsequent pop-up shows the current directory and this new folder's name is filled in.

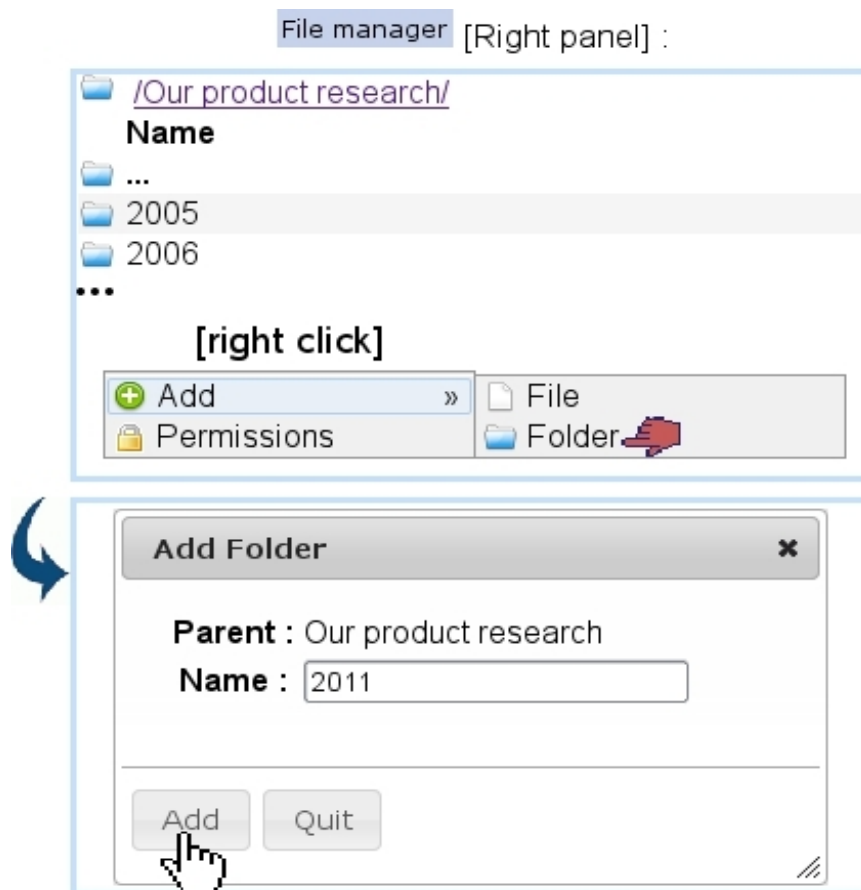
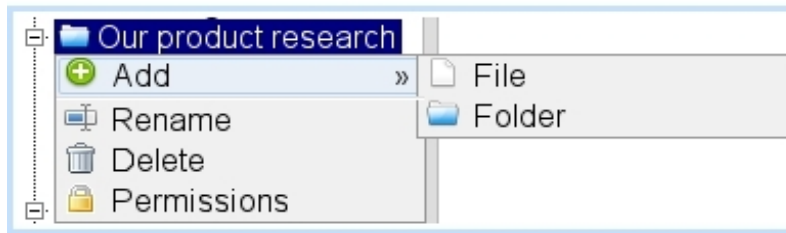


Figure 7.24: Creating the new folder '2011' at the 'Our product research' directory.

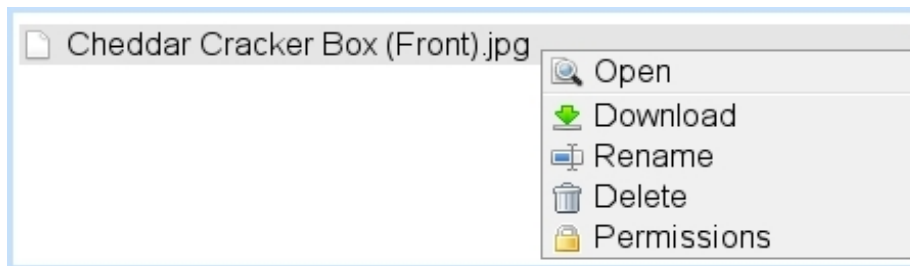
This folder could also be have been created from the left panel by a single click to highlight folder 'Our product research' and by then a right click :

File manager [Left panel] :



Files are uploaded in a similar way through **Add file**, except that pop-up window has a **Browse...** button to find the aimed file in your computer.

Folders and files can then be practically managed (renamed, downloaded in the case of files, deleted) by positioning mouse cursor over the object and doing a right-click, which thus shows the following choices :



The appearance of those various options depends on which default rights or user group rights have been assessed to this folder/file.

7.4.2 File and folder rights

General rights regarding files and folders are set individually for them, through **Permissions**, as accessed via a right-click on the object.

On the pop-up as featured as an example in Fig.7.25, the following is featured :

- general information on the object such as creation/last modification dates, creating user... ;
- a series of rights menus.

Those rights aim to specify for each user group if its members have the right to read, create, delete, modify this file or folder. When a menu is left as 'Unspecified (see Others)', the right as defined further down as 'Default right:' then applies.

When a file or folder is created, by default all of the menus are set as 'Unspecified' and the 'Default right:' is set to Delete/Create/Modify, which means that, unless permissions are updated, any user from any group can perform these actions on the object.

If object is a folder, the 'Apply to sub-objects' check-box can be ticked so that the rights are also applied to the objects under this folder.

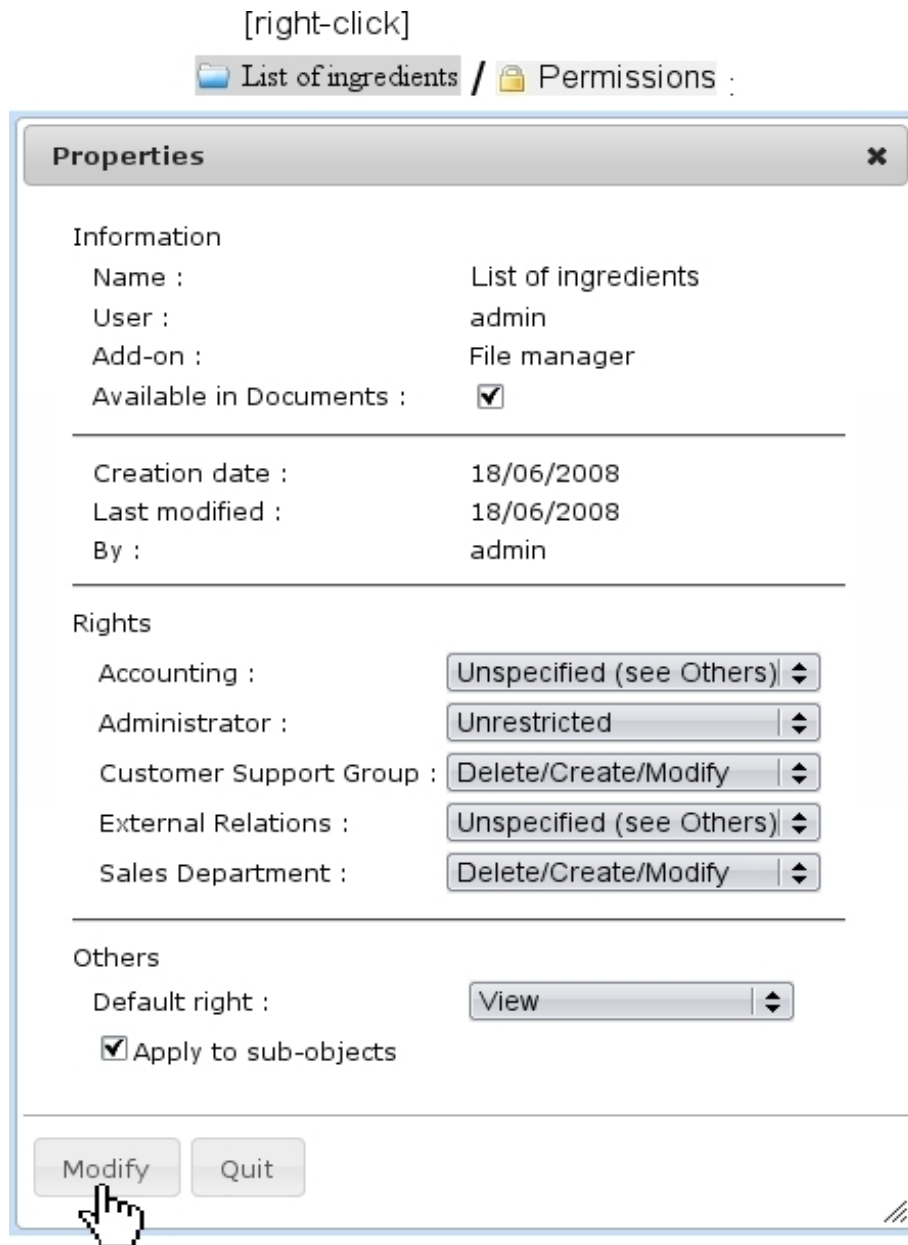


Figure 7.25: Setting the rights for the folder 'List of ingredients'.

7.5 Lists of Tasks

During the life of a company, some deeds have to be performed on a regular basis, such as the checking of office supplies reserves, the maintenance of appliances like printers, the cleaning of sensitive equipment...

To keep track of what has been done and by whom, Blue Chameleon provides an interface where :

- different 'task models' (e.g., 'Printer maintenance') are defined ;
- to each of those, task types (e.g. 'Change/recycle empty toners', 'Order paper',...)

are attached ;

- this framework allows, on a predefined periodical basis, to manage tasks, all the while keeping trace of what has been done.

7.5.1 Rights for Lists of Tasks

They are ruled at the *Modify User Page* (Fig.9.17) for instance as illustrated in Fig.7.26.



Figure 7.26: The user rights that rule Lists of Tasks.

For this user :

[*Menu script user rights* :]

- Task List : rules the access to the List of Tasks add-on

[*Task List user rights* :]

- Model management : rules the prerogatives (view, create, modify, delete) that user has on task list models (7.5.2), in general ; rights for *individual* models are set elsewhere (7.5.2.2) ;
- List management : rules the prerogatives (view, create, modify, delete) that user has on task lists (7.5.3).

All commands in this sections are accessed via **Add-ons** / **Task List**.

7.5.2 Task list models and task types

Fig.7.27 features the creation of a task list model called 'Water fountains' ; there, the following is set :

- a name for this model ;

- a periodicity (daily, weekly, monthly, quarterly, biannual or annual) ;
- a start date.

Add-ons / Task List / Models :

Task list, Models, Add

Model name :

Period :

Start date : 12/9/2011

Task list, Models

Model	Period	Start date	End date	Status	Tasks	
Water fountains	Weekly	12/09/2011	12/09/2011	Inactive	0	<input type="button" value="Modify"/> <input type="button" value="Delete"/>

Figure 7.27: Creating a new task list model.

After creation, model is featured in a table where the aforementioned data is featured, with also an end date, a status (inactive yet), a number of attached tasks (none exists yet), and eponymous buttons to modify or delete it, providing that the user rights for 'Model management' are sufficient (7.5.1).

7.5.2.1 Modifying a task list model

As shown on Fig.7.28, modifying a task list model provides more options than during its creation :

- setting its status : active/inactive (for a task list model to be opened (7.5.3.1) in the future, it must be set to 'Active') ;
- setting an end date ;
- adding a comment to generally describe the task list model ;
- setting the as explained further down ;
- ing tasks to it.

It is to note that once a task list is opened (7.5.3.1), periodicity and start date cannot be modified anymore.

Task List / Models / **Water fountains** Modify :

Task list, Models, 'Water fountains', Modify

Model : Water fountains

Period : Weekly

Status : Active

Start date : 12/9/2011

End date : 31/12/2011

Comment : Everything related to maintenance, fill... of water dispensers

Update Access rights

No task

Add

Figure 7.28: The *Task List Model Modify Page*.

7.5.2.2 Access rights of a task list model

These rights, as illustrated at Fig.7.29, rule, usergroup-wise, whether users can view or modify task list models, or none of those (in which case it will be hidden from the user).

[Task List Model Modify Page] Access rights :

Task list, Models, 'Water fountains', Update, Access rights

Accounting : View

Administrator : Modify

Customer Support Group : View

External Relations : View

Sales Department : View

Update return to models

Figure 7.29: Usergroup-related access rights for task list model 'Water fountains'.

The usergroup(s) current user belongs to are displayed in bold font.



It is to note that the 'Unrestricted' value as set for 'Model management' (7.5.1) allows to access any model regardless of its usergroup access rights. This can be useful to still access (or modify) a model if, by mistake, all its usergroup rights had been set to 'None' (or 'View').

7.5.2.3 Adding task types to task list models

As seen on the *Task List Model Modify Page* (Fig.7.28), a button allows to add task types to a task list model.

Apart from a name, as Fig.7.30 shows, a task type is assessed a default user, a status (setting it immediately to active is advised) and a comment.

[Task List Model Modify Page]

Task list, Models, 'Water fountains', Add

Task name :

Default user :

Status :

Comment :




Figure 7.30: Adding a task type for task list model 'Water fountains'.

Of course, more task types can be added by the same process. As a result, *Task List Model Modify Page* feature those task types, which can be individually modified and deleted :

[Task List Model Modify Page] :

Task	User	Status	Comment		
Gen. cleaning	Jack Jones	Active	Disinfect taps, scrub gaskets	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
Bottle mgmt	Jack Jones	Active	Replace, reorder, recycle	<input type="button" value="Modify"/>	<input type="button" value="Delete"/>
<input type="button" value="Add"/>					

7.5.3 The use of task lists

Now that the creation of task list models and their task types has been shown, it is time to see how they are put in gear.

7.5.3.1 Opening a task list

On the page as accessed via **Add-ons** / **Task List**, a **Open list** button is featured ; clicking on it leads to a page where task list models as previously defined are featured.

Fig.7.31 shows this page ; it can be seen that each task list model has a checkbox, which is only enabled if **task list model is set to active** ; to do so, go to the *Task List Model Modify Page* (7.5.2.1) and set status to 'Active'.

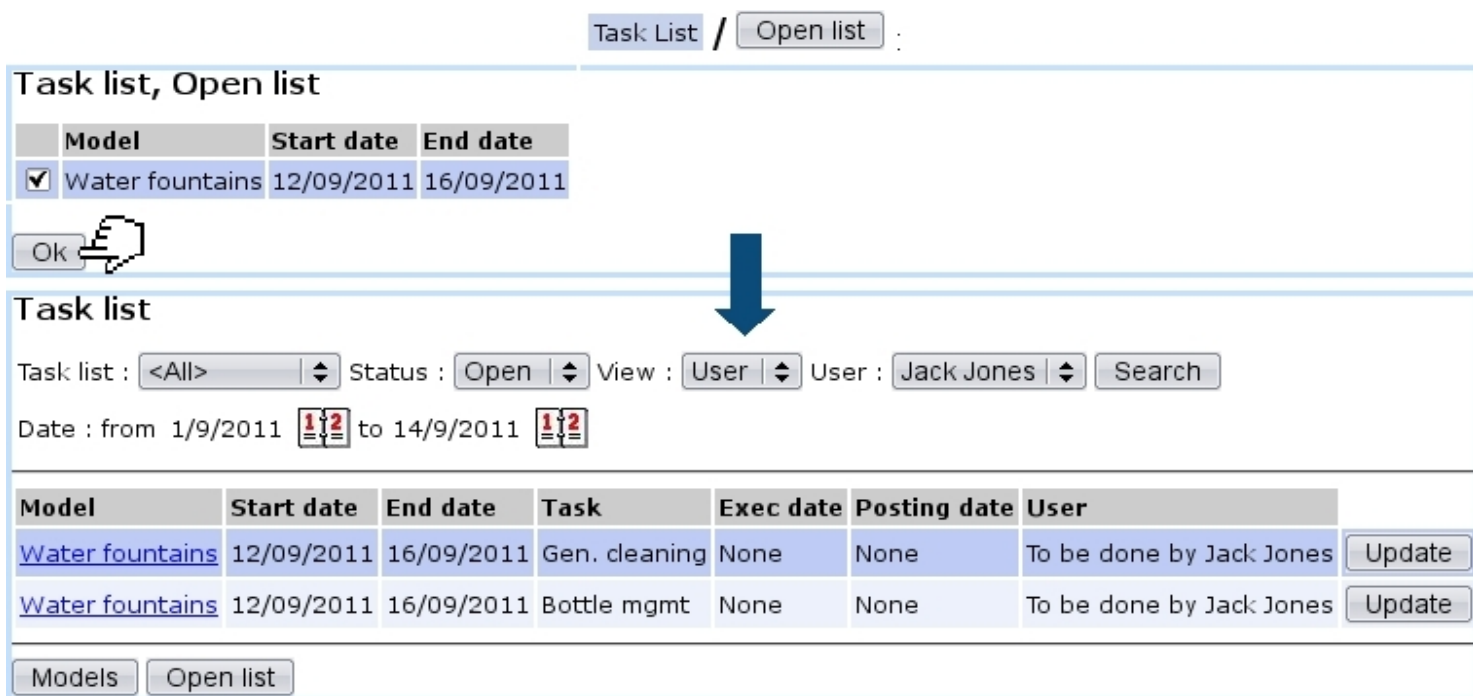


Figure 7.31: Opening task list 'Water fountains'.

The 'Date end' as featured on the first screen corresponds to the periodicity (here, weekly). Upon click on **Ok**, the main page of the add-on is shown again, now featuring :

- for the opened task list, the tasks to be done (corresponding to the task types that had been defined, 7.5.2.3), with start and end dates corresponding to the periodicity ;
- execution and posting dates, not existing yet if task has not been done ;
- the user who is supposed to accomplish this task (as defined by the default user in Fig.7.30) ;
- an **Update** button for each task.

Tasks are displayed in red if their due date is inferior or equal to the current date.



If a task list has not been opened before the first day it is supposed to start (depending on the periodicity), it is opened automatically.

7.5.3.2 Searching for task lists

As shown in Fig.7.31, this add-on's main page features several menus to perform task list searches :

- by task list name ;
- by status :
 - Closed, which is the state of a task list which all tasks have been accomplished (7.5.3.4) ;
 - Open, which is the state of a task list which has still unaccomplished tasks ;
 - All task lists, whether open or closed.
- viewing by user (which is what is shown on Fig.7.31) or by task, which offers another view detailed further down.
- by user.

Also, two calendars allow to narrow the display of task lists in the span of specific dates.

7.5.3.3 The 'View : Tasks' display

Setting the 'View:' menu to 'Tasks' displays what is featured on Fig.7.32 ; there, in contrast to the 'User' view (Fig.7.31) :

- the view is more synthetic as a single line is dedicated to a task list ;
- the number of accomplished tasks for this task list and the total number of tasks are featured (e.g. 0 tasks done on the 2) ;
- a button leads to a page detailed at 7.5.4 where the details of tasks are shown and can be printed out as a PDF ;
- a button leads to a page where tasks are displayed in a table very similar to the 'User' view ;
- a button allows to declare tasks as accomplished.

It is to note that in this display, the 'User' menu is without effect.



Figure 7.32: The 'Tasks' view.

7.5.3.4 Recording tasks

Declaring the task(s) of a task list as done is most easily achieved through the button as available in the 'View : Tasks' display (see above).

As illustrated on Fig.7.33, a task that was done is ticked, its execution date is chosen and a comment is added. Of course, should the tasks of a task list be not accomplished on the same day, this screen can be accessed anytime.



Figure 7.33: Declaring these tasks as done.

When all tasks belonging to a task list are done, this task list is closed ; the task list name click-link (e.g. [Water fountains](#)) then leads to a similar 'record' screen except

any action is now disabled.

This way of recording achieved tasks is the simplest. It also sets the 'To be done by' user as the default user for this task ; should a modification be done in execution date or user, a more detailed screen is available as explained next.

7.5.3.4.1 Updating tasks As it can be seen on the 'User' view (Fig.7.31), each task of a task list has an button, leading to a screen as illustrated at Fig.7.34.

There, execution date (but *not* posting date), user in charge/user who did it and comment can be updated.

This screen can also be used to declare an undone task as done.

Task List / [View : User] :

Models	Task	Exec date	Posting date	User	
Water fountains	Gen. cleaning	16/09/2011	16/09/2011	Jack Jones	<input type="button" value="Update"/>

Task list, 'Water fountains', 'Gen. cleaning', Update
From 12/09/2011 to 16/09/2011

Exec date : 16/9/2011
Posting date : 16/09/2011

User : To be done by :

Comment :

Figure 7.34: Options by which updating a task.



The advantage of this screen in contrast to the 'Record' one as presented above is when task is done by an other user than the one who was supposed to do it. This screen also allows to "undo" a task (7.5.5.1).

7.5.4 Printing out task lists

When a 'View : Tasks' display is on, clicking on the button leads to the page illustrated at Fig.7.35, where tasks are listed along their execution and posting dates, the

user who did them and their comment.

A **Print** button then allows to generate a PDF file summing up this data.

Task List / [View : Tasks] :

Model	Start date	End date	Status	Tasks
Water fountains	12/09/2011	16/09/2011	Closed	2/2 View Modify

Task list, 'Water fountains', View
From 12/09/2011 to 16/09/2011

Task	Execution date	Posting date	User	Comment
Bottle mgmt	16/09/2011	16/09/2011	Jack Jones	New batch of 50 gal. bottles ordered
Gen. cleaning	16/09/2011	16/09/2011	Jack Jones	Evthg. was cleansed thoroughly

Print

[Result on generated PDF] :

Water fountains from 12/09/2011 to 16/09/2011

Task	To be done by	Done by	Posting date	Execution date	Comment
Bottle mgmt	Jack Jones	Jack Jones	16/09/2011	16/09/2011	New batch of 50 gal. bottles ordered
Gen. cleaning	Jack Jones	Jack Jones	16/09/2011	16/09/2011	Evthg. was cleansed thoroughly

Figure 7.35: Printout of a closed task list.

7.5.5 Management of Task lists through time

Task lists are periodical, which means they are to be cyclically recommenced. This is done exactly as described in 7.5.3.1, except that now, the start and end dates have been updated according to the periodicity of the task list, here corresponding to the next week :

Task List / **Open list** :

Task list, Open list

	Model	Start date	End date
<input checked="" type="checkbox"/>	Water fountains	19/09/2011	23/09/2011

Ok

Previously-achieved task lists remain of course available to be consulted anytime by making searches with 'Closed', 'Tasks' for the status and view menus.

7.5.5.1 Re-opening a task

It may happen that, though a task has been declared as done, it must be opened again for whichever reason.

This can be done as featured on Fig.7.36 by making a search with 'Closed', 'User' for the status and view menus ; the **Update** button will still be available to access the screen to update this task : there, setting the 'User' menu to '**Unspecified**' will re-open this task.

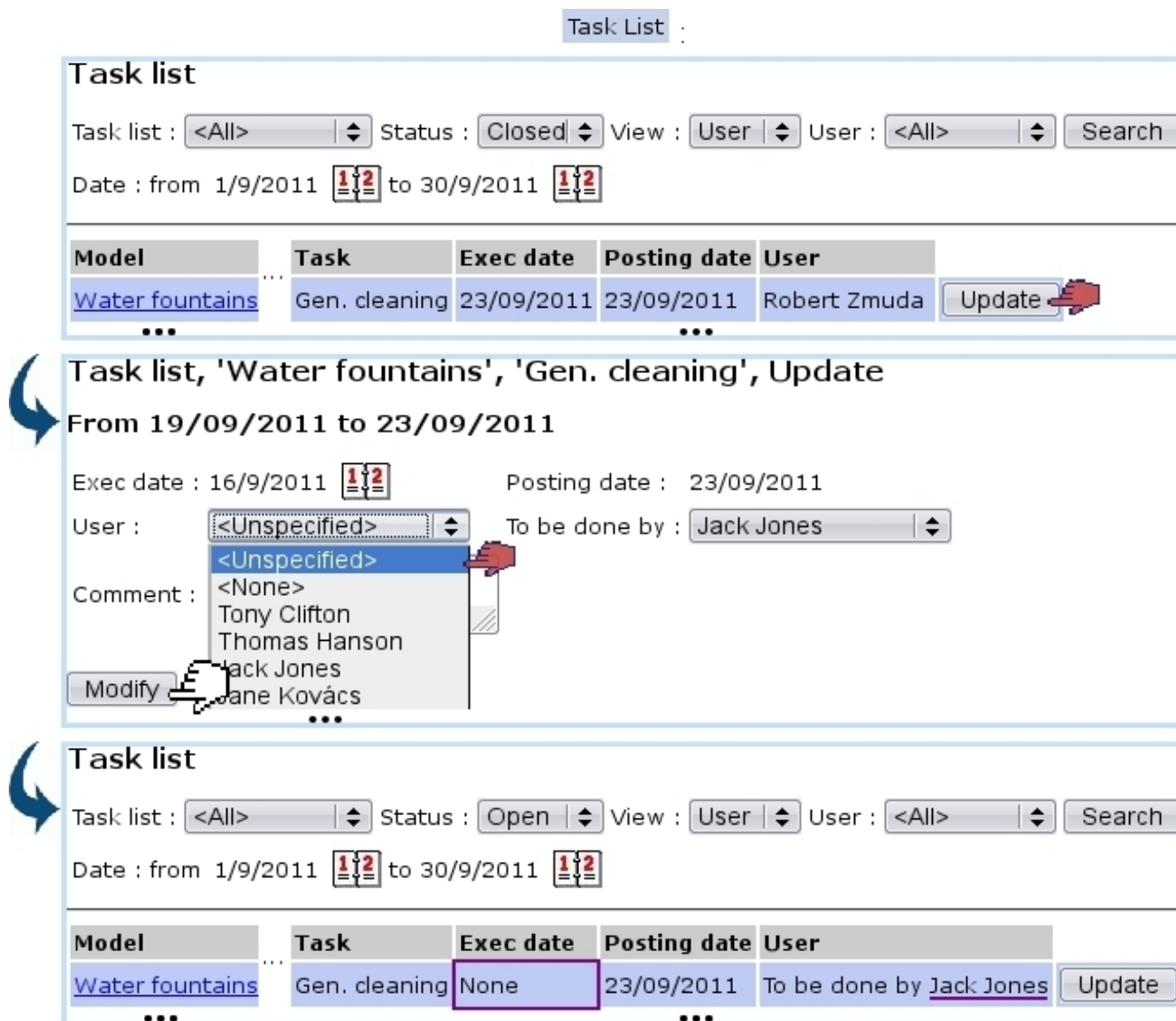


Figure 7.36: A done task that, upon inspection, did not fulfill the review, is opened again. Execution date is back to 'none'.

It is to note that the 'None' option as seen in Fig.7.36 still flags the task as done, but without mentioning any user in particular.

7.6 Object properties

Things handled during the use of Blue Chameleon (articles, clients, documents...) are most generally called objects.

While we always strive to provide the most exhaustive forms to define or modify them, some particular properties that you might want to define to qualify an object with may be missing.

That is why we developed a dedicated add-on aimed at defining your own properties for your clients, articles... And manage them in an easy way.

7.6.1 Rights for Properties

They are ruled at the *Modify User Page* (Fig.9.17) for instance as illustrated in Fig.7.37.

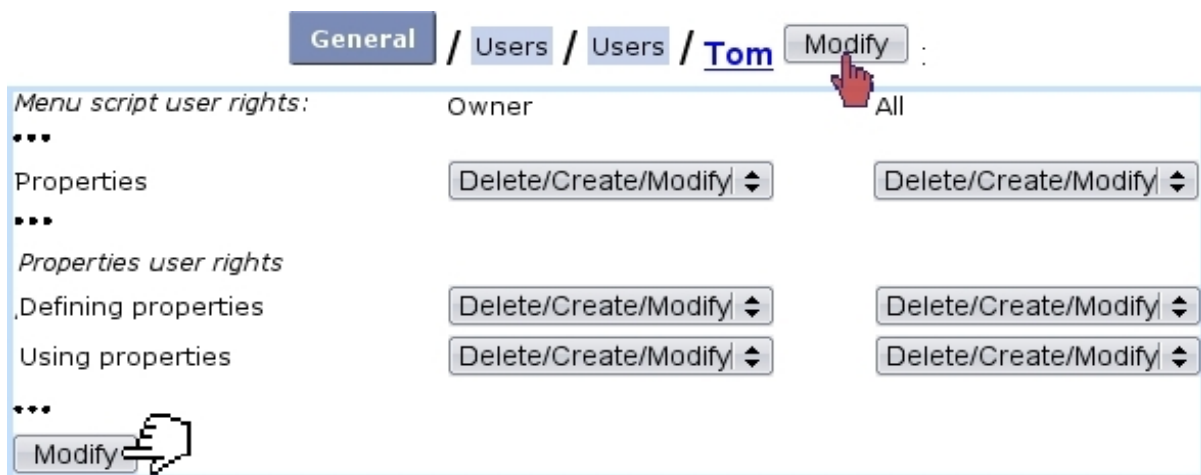


Figure 7.37: The user rights that rule Properties.

For this user :

[*Menu script user rights* :]

- Properties : rules the access to the Properties add-on

[*Properties user rights* :]

- Defining properties : rules the prerogatives (view, create, modify, delete) that user has on properties (7.6.2) ;
- Using properties : rules the prerogatives (assessing, modifying, removing) that user has on an object's property/ies (7.6.3).

All commands in this sections are accessed via **Add-ons** / **Properties**.

7.6.2 Creating properties and managing them

Fig.7.38 features as an example how a new property "ID Registered" is added for clients ; there, the following is defined :

- a name for this property ;
- its type : User or System ;
- the object type (the list of available objects to set properties for is featured at 7.6.4) ;
- the type of data this property will be, amongst the following choices :
 - Yes/No : a simple menu with these choices ;
 - Boolean : a simple menu with True/False ;
 - Boolean extended : a simple menu with True/False/Null ;
 - Integer ;
 - a Date or a Time (7.6.2.1.1) ;
 - Listbox : a menu which items are added by user ;
 - Ref. object : another object (an extensive example is featured at 7.6.3.2).



The screenshot shows a dialog box titled "Property, Add" with a breadcrumb trail "Add-ons / Properties / Add". The dialog contains the following fields:

- Property name: ID registered
- Type: User
- Object type: ossbo - Clients
- Data type: Yes/No

An "Add" button is located at the bottom left, with a hand cursor icon pointing to it.

Figure 7.38: Creating a new property aimed at clients, consisting in Yes or No choices.

After their creation, properties can be looked for add-on's main screen :

Add-ons / **Properties** :

Search property

Property name: Type: <All> ▾

Object type: ossbo - Clients ▾ Status: <All> ▾

Property	Type	Object type	Data type	Default value	System	
ID registered	User	ossbo - Clients	Yes/No	No	<None>	<input type="button" value="View"/> <input type="button" value="Modify"/>

A table sums up properties' types and object types as well as providing a button, allowing as described next to configure properties more extensively.

7.6.2.1 Modifying properties

As featured on Fig.7.39, modifying a property offers a far greater choice of configuring options.

There :

- General information such as property name and comment can be modified/added. Also, the default value of the property when it will be set for an object (7.6.3) as a 'System' value. It is to note that property type, related object type and data type cannot be modified anymore.
- the style of the property is set :
 - the status of the property (**setting it to 'Active' is necessary for it to be used**) ;
 - whether this property will be shown in the object's summary, if it has one (7.6.4) ; this item is better set to yes, then ;
 - whether multiple occurrences of that property are allowed for one object ;
 - if the 4-eyes principle is applied : an update in property's value can only be achieved if current user is different from the last user to have done a modification ;
 - In the context of the object it is set for :
 - * whether the property can be added on creation ;
 - * whether the it can be updated ;
 - * whether it can be deleted.
 - the minimum level required to update a property, comparing with user's privacy access level (11.1.1.2) ;
- How property label and its values (here, Yes and No) will appear on the screen : normally, with the 'Warning' style (i.e., in red) or in bold font.

[Search Properties] **ID Registered** :

Property, 'ID registered', Update

Property :

Type : User

Object type : Clients

Data type : Yes/No

System :

Default value :

Comment :

Style :

Status :

Show in summary :

Multiple :

4-eyes principle :

Add on create :

Add :

Delete :

Update :

Access level :

View :

Label :

No :

Yes :





Figure 7.39: Modifying property 'ID registered'.

7.6.2.1.1 Date, Time properties These properties, when they are updated or set for an object, feature a calendar icon  that allows to choose a date ; also time in the case of the eponymous property.

7.6.2.1.2 'Ref. object' properties Properties of that kind offer more configuring possibilities, as featured on Fig.7.40. As a 'Ref. object' property consists in associating another object with the object this property applies to, the type of the associated object

has to be chosen.

This choice is done through the 'Associated object type', where a particular object type the property will be (in this example, a document) can be set, along with an (optional) default value. When the property will be set for an object, for instance as shown in 7.6.3.2, this particular object type will be imposed.

[Search Properties] **Entry contract** :

Property, 'Entry contract', Update

Property :

Type : User

Object type : Clients

Data type : Ref. Object

System :

Associated object type :

Default value : None

Comment :

...

Figure 7.40: This property applying to clients will only accepts documents for its value.

This imposed associated object type can be removed by setting the menu to 'All'.

7.6.3 Setting properties

In the current example, a property as applied to clients was created.

Such properties will appear on the *Client Management Page* (2.3), where they are still not set :

Client management

Username:	Smith.John	Subscription status:	activated
Title:	Mr	Active subscriptions:	1
Name:	Smith	<div style="border: 1px solid black; padding: 5px;"><p>There is no property</p><p>More...</p></div>	
First name:	John		
Address:	12 Orange Road 90000 Los Angeles		

...

Then, clicking on the [More...](#) link leads to a process featured on Fig.7.41 where :

- a screen saying that this object has no property (yet) allows to one ;
- then, a menu enables to choose a client-related property (here, our 'ID registered') featured along with its default value (7.6.2.1), which is set to whichever is needed ;
- a final screen sums up the set property and provides a button to go back to the *Client Management Page*, where the property and its value are now appearing.

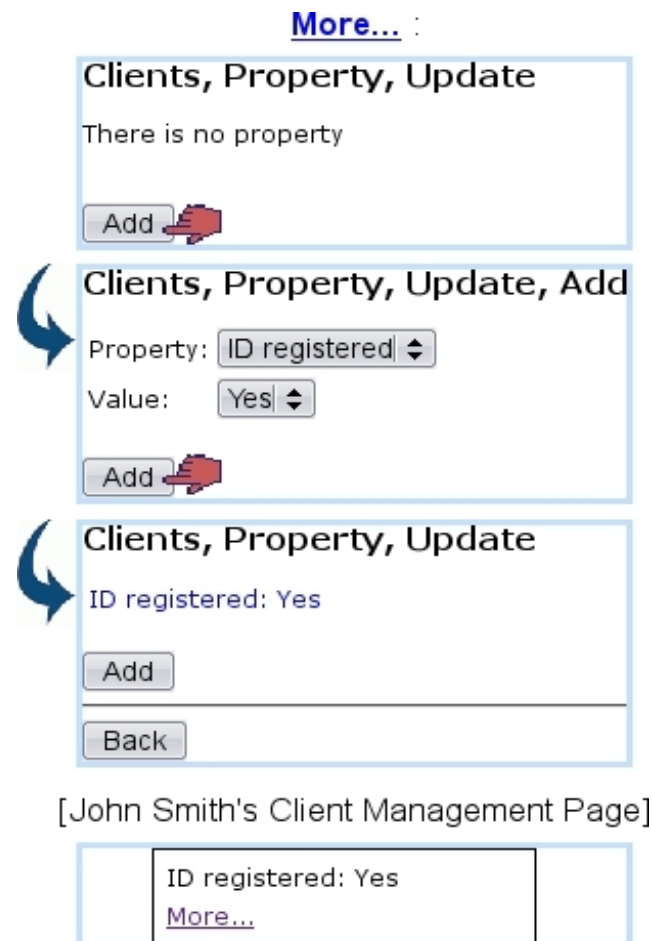


Figure 7.41: Setting the property 'ID registered' to 'Yes' for client John Smith.

7.6.3.1 Updating, removing a property

Afterwards, if needed, this client property can be updated via the [More...](#) link, as shown in Fig.7.42.

This can only be done by the same user if property's 4-eyes principle (7.6.2.1) was set to No.

It can be seen that a is available for property to be removed.

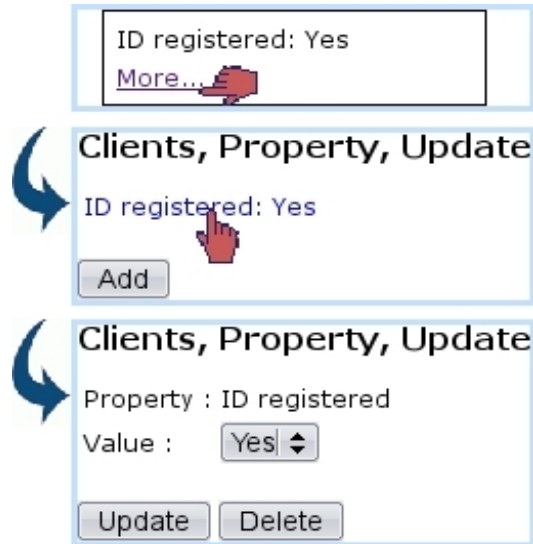


Figure 7.42: This allows a property to be changed or removed.

The updating and deleting a property are only available if property's style (7.6.2.1) allows so.

7.6.3.2 Adding other properties

Other properties - if they exist for the current object type - can also be added through the eponymous button.

For instance, a Ref. object property called 'Entry contract' has been defined for clients ; Fig.7.43 then shows how this property is set to a particular document object (as uploaded through the File Manager, 7.4) for a client.

It is to note that, in this example, the choosing of a document is imposed (in contrast to any other object type) because the 'Associated object type' field for 'Entry contract' property (7.6.2.1.2) was set to 'documents'.

As a result, on the *Client Management Page* for this client, this new property will appear (Fig.7.44).

7.6.4 List of objects to set properties for

So far in Blue Chameleon, a "Property" frame can be seen in the following contexts :

- 2.3 *Client Management Page*

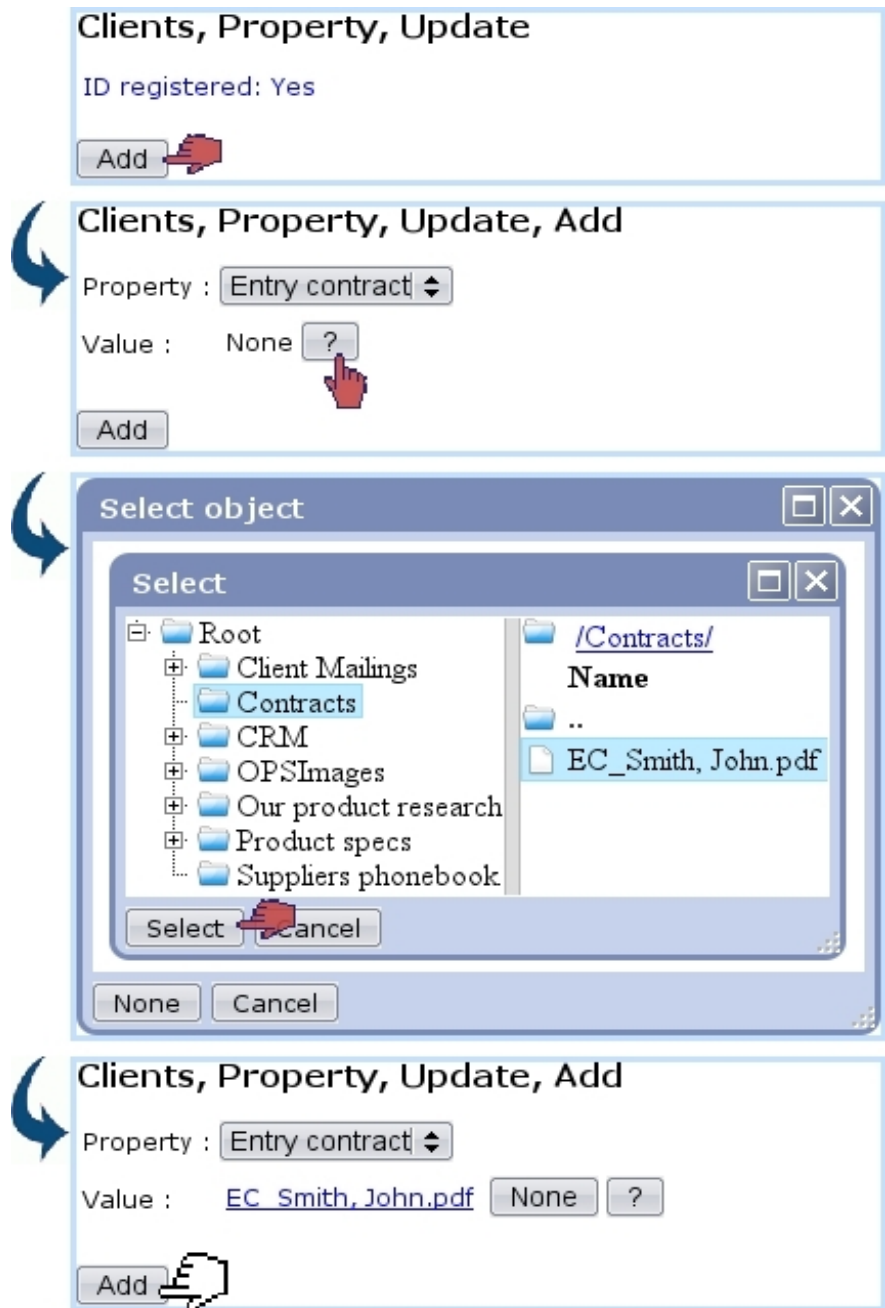


Figure 7.43: Adding an other property for a client.

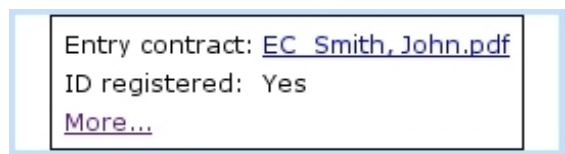



Figure 7.44: The two previously-set properties are now featured.

7.7 Paperwork management

A company's everyday life often entails the reception and sending of paper documents, sometimes in such volumes that it becomes difficult to keep track of what has been received/sent and when, also what shall be sent.

In order to make this easier, this Blue Chameleon addon allows to keep trace of any communication-related event and permits actions such as :

- upload documents from the computer and associate them with a client ;
- attach documents to other documents, such as sent replies ;
- optionally create tickets associated with documents, in order to give them a "to-do" feature.

All the commands in this add-on are accessed via .




Paperwork management access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element

[Menu script user rights :] Mail

7.7.1 The *Mail Management Page*

As illustrated at Fig.7.45, the main page of this add-on allows to add and search for mail documents ; it features the following :

- a  which leads to a client search ;
- a menu allowing to choose a specific mail document type (7.7.7) ;
- a 'state' menu enabling to choose only sent or received documents, or any of those ;
- 'treated' and 'archived' menus allow to search specifically for documents flagged as such (7.7.6), or not, or any ;
- the ordering of search results by creation, or modification dates, or by access level (7.7.2) ;
- a 'Show attached' menu allowing to show only documents that are attached to no other ('no'), optionally featuring their attached documents in the table ('as parent'), or any kind of document regardless of attachments ('as document') ;
- two calendar icons permitting to restrict search results in between (as 'Date:') two creation or modification dates ;

- a allowing to upload and create a new mail document entry (7.7.3).

Add-ons / Mail :

Documents

Clients : ? - type : state :

treated : archived : ordered by :

Show attached : Date :

from Monday 02 May 2011 to Friday 06 May 2011

Object name	Documents	Date	Access	Type	Modification	
...						...

Figure 7.45: The *Mail Management Page*.

Search results are summed in a table that features client and mail document names, reception, creation and last modification dates, access level of the mail document, type (7.7.7) and, as seen on Fig.7.47, three buttons that allow to view/act on the mail document in various ways (7.7.3.1, 7.7.3.2, 7.7.3.3).

7.7.2 Access levels

As some mail documents might be confidential or irrelevant for some users to see, mail documents are assessed an access level from 0 to 5, comparing with user's privacy level (11.1.1.2) as set on the Modify User Page (Fig.9.17).

So, for instance, if a mail document has been assessed an access level of 3, only users with a privacy level of 3 or above will be able to open it and attach mail documents to it ; nonetheless, it will still appear only nominally in the mail document table.

7.7.3 Creating a mail document

For instance, when a mail document is physically received, it is scanned as a PDF ; it is then uploaded into Blue Chameleon's Mail Manager in the way featured at Fig.7.46.

The simple process is as follows : on the *Mail Management Page*, the is clicked, leading to a client search, that ultimately makes the makes her/him featured in the eponymous field ; the same button is clicked again, leading to a page where :

- client general information is summed up ;

- the document to be uploaded via is given a name ;
- its type (7.7.7) as well as its state ('received') are chosen ;
- the creation of a ticket (7.7.3.2) is recorded (if type allows/forces it), and this ticket can be already forwarded to another person ;
- the reception date of the document can be set (it is set by default to the current day) ;
- an access level is chosen (7.7.2).

[Mail M. Page] / [Client Search] /

Clients: ... :

New document

[Client General Info]

Document name :

Document :

Type :

Ticket :

Date : - -

Access level :

Comment :

Figure 7.46: "Entering" a newly-received and scanned document into Blue Chameleon.

Upon successful creation, the *Mail Management Page* will feature the document in its table, as illustrated on Fig.7.47.

There, **provided the user's privacy level is equal to or greater than the document's access level** : the name of the mail document is featured as a click-link that allows to download it and three buttons are accessible : for viewing it, viewing its ticket, or attach documents to it.

These actions are described next.

[Mail Management Page] :

Object name	Documents	Date	Access	Type	...
Tax Office	Tax Form, 2011	30/9/2011	4	Gen. Mailing - received	...

Type	Modification				
Gen. Mailing - received	30/9/2011 10:30	<input type="button" value="View"/>	<input type="button" value="View ticket"/>	<input type="button" value="New document"/>	

Figure 7.47: A document with all its main information.

7.7.3.1 Viewing/managing a mail document

Fig.7.48 shows the pop-up displayed by ing a document.

[Tax Form, 2011](#) ... :

View document

Creation : **30/9/2011 10:30** by **admin**
Modification : **30/9/2011 10:30**
Object : **TaxOffice**
Type : **Gen. Mailing - received**
Document : [Tax Form, 2011](#)
Date : **30/9/2011**
Ticket : [227](#)
Access level : 4
Treated : no
Archived : no

Figure 7.48: Details of a mail document.

There :

- the client (or object) associated with the document can be updated ;
- the mail document can be downloaded via the click-link ;
- a click-link leads to the view of the attached ticket (see 7.7.3.2), if mail document entailed the creation of one ;
- the access level of the mail document can be lowered or raised ;

- the mail document can be deemed treated and/or archived (7.7.6) ;
- a button allows to attach it to another document (7.7.4) ; this button can only be clicked if current document is not already attached ;
- if the document is attached to another document (and/or the other way around), it is featured (7.7.5).

7.7.3.2 Mail document tickets

If mail document creation included the creation of a ticket as it is the case in the current example, this ticket can be accessed either via the **View ticket** as found (if user's privacy right is sufficient) on the *Mail Management Page* or via the click-link as previously seen (e.g. [227](#)).

Either way, what is featured on Fig.7.49 will appear on the screen : a pop-up summing up which user group this ticket has been assessed to along with status and date, as a click-link to the *View Ticket Page* (8.3.3).

The uploaded document can also be downloaded here.

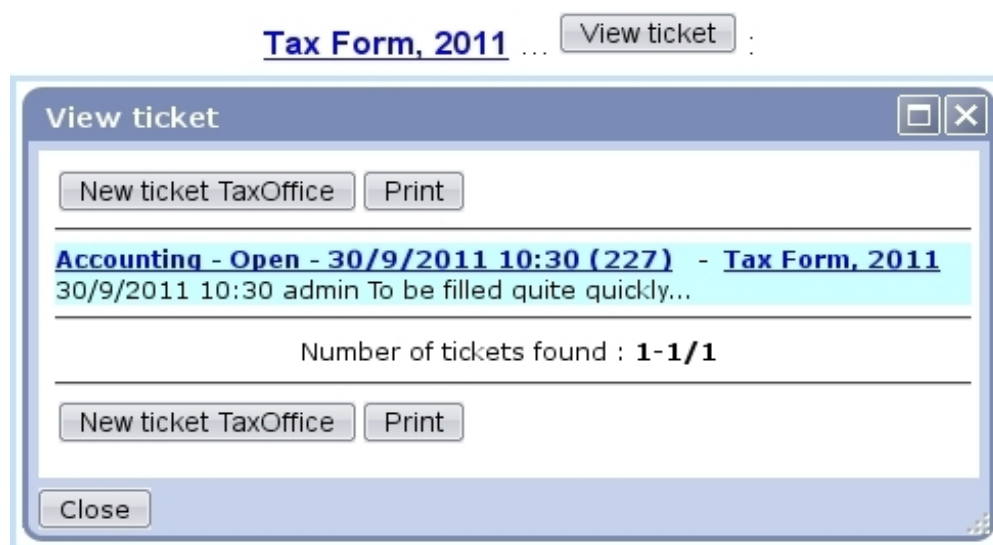


Figure 7.49: A short summary of the ticket created along the mail document ; from there, this associated ticket can be managed.

This way of doing, associating a ticket, endows the mail document with a feature of timely importantness.

7.7.3.3 Attaching mail documents

Still from the *Mail Management Page*, using the **New document...** button, a new document can be created as attached to this document.

An example of a "reply" is featured at Fig.7.50 ; the mail document for which to create an attachment is reminded and the correct status (here, 'sent') is selected.

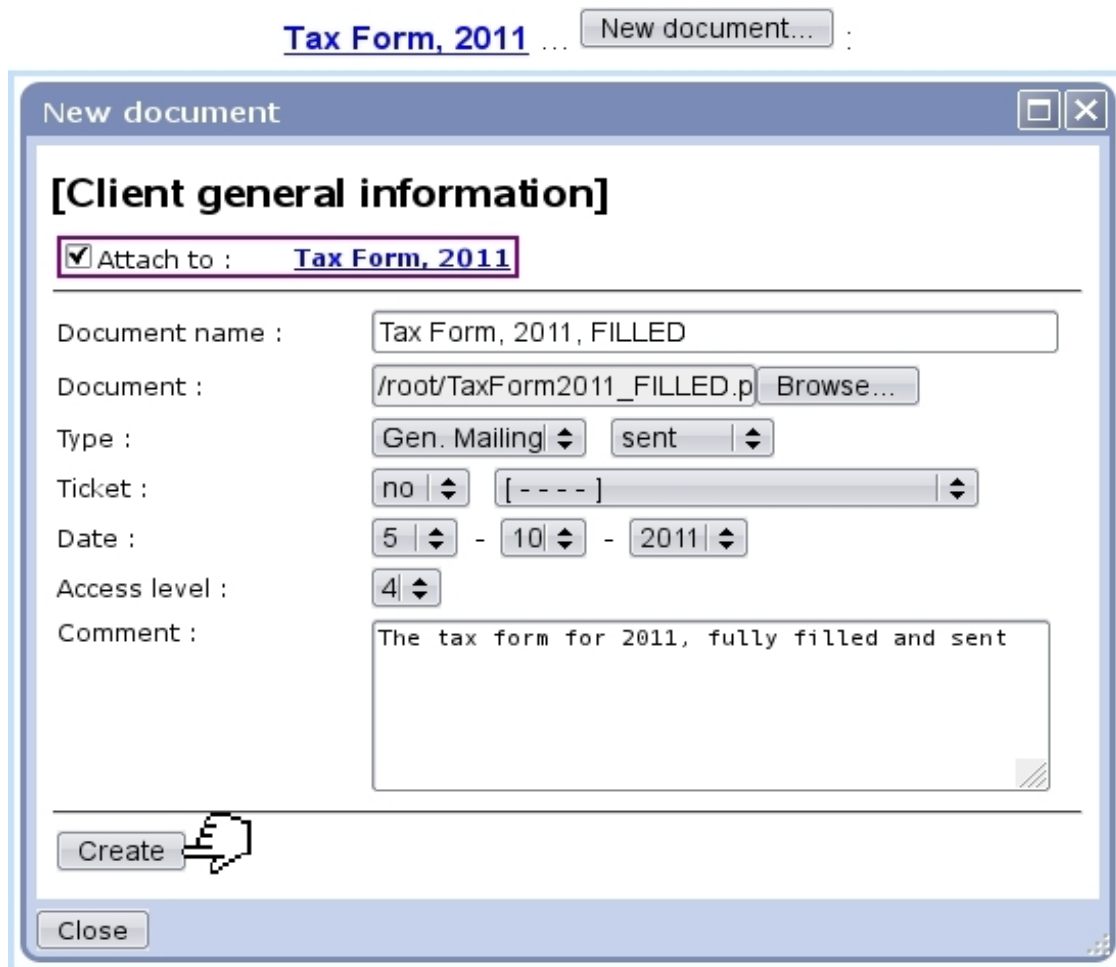


Figure 7.50: Attaching a reply to mail document 'Tax Form, 2011'.

This action can be done as many times as wanted, as a document can have several attachments.

7.7.4 Attach current mail document to an other

This process is the reverse of the one previously described : now, from the *View Document Page* (Fig.7.48), using the **Attach to** button, current document is attached to an other.

Contrary to the previous process, this can be done once, as a document can be attached to one and only other document.

Fig.7.51 shows the simple process of attaching currently viewed mail document to an other.



Figure 7.51: In this example, mail document 'Tax Form, 2011' is being attached to mail document 'FINC. MERGE 2011'.

7.7.5 Viewing attachments/attached document

In order to keep track of which document is attached to which, the *View Document Page* always features the parent document and the attached documents ; Fig.7.52 features both.

It can be seen that the *View Document Page* for [Tax Form, 2011](#) (that was first featured at Fig.7.48) now features an **Attachments** part with the attached document [Tax Form, 2011, FILLED](#) (as a click-link to be downloaded), as well as an 'Attached to' part resulting from what was done at 7.7.4.

Conversely, the *View Document Page* for [Tax Form, 2011, FILLED](#) features the mail document it is attached to.

This two-way of displaying information ensures that no ambiguity is left.



Figure 7.52: These are "linked" documents.

7.7.6 Flagging mail documents as treated and archived

In order to make the displaying and searching of mail documents easier, thanks to the 'Treated' and 'Archived' menus as seen on Fig.7.48, it is possible to :

- declare a document as treated, for instance when a reply has been added to it ;
- declare documents as archived, when the thread of received/replied-to documents is over, so that it does not clutter the display on the *Mail Management Page*.

Any change in those menus must be validated via the **Update** button at the bottom of the pop-up.

Treated and/or archived documents can be looked for specifically on the *Mail Management Page* thanks to the eponymous menus.

7.7.7 Mail document types

[In Development]

7.8 Wall

[In Development]