

# BLUE CHAMELEON : General Tools (Full)

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*download the relevant chapter or the **Blue Chameleon Full Documentation**.*

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

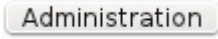

In order to broadcast miscellaneous company-related news to users, Blue Chameleon has designed a news tool that, upon login, permits user to be noticed of anything happening, as well as, should it be needed, publishing her/his own news to inform the user community about particular events that may happen.



*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

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**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.




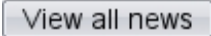
Figure 7.3: Publishing a recently-created piece of news.

### 7.1.4 Reading news

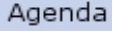
As illustrated by Fig.7.4, if the news Event Control has been setup (1.3) by the user, freshly published news will be displayed when logging in on Blue Chameleon, or when clicking on ; either way, unread news can be displayed by clicking on .



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*

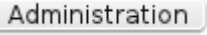
*[Menu script user rights :] Agenda*

### 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

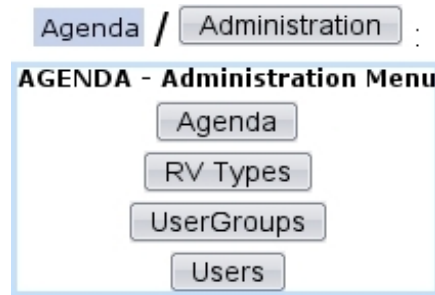


Figure 7.5: The *Agenda Administration Page*, with buttons designed to configure agenda display and rights.

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.

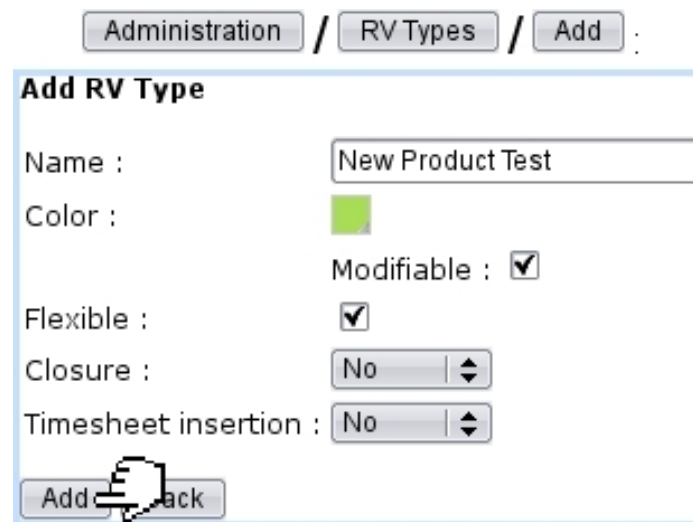


Figure 7.6: Creating a RV type called 'New Product Test'.

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

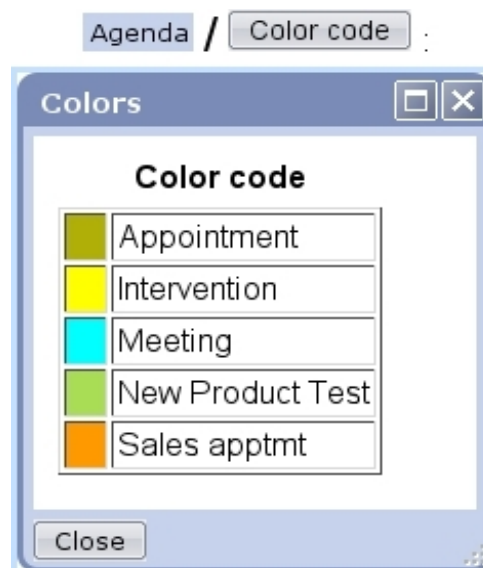
When a RV type is added as described above or when an appointment is edited (7.2.3.2), the color under which related appointment appears can be defined/updated in way shown at Fig.7.7.



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 ;



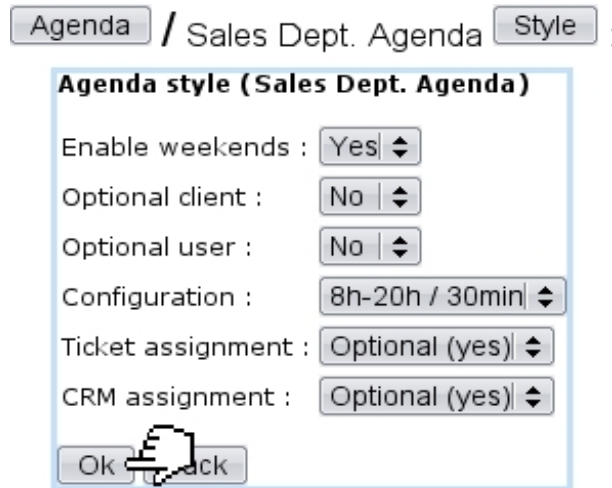


Figure 7.9: Defining the 'Sales Department' agenda style.

- 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*.

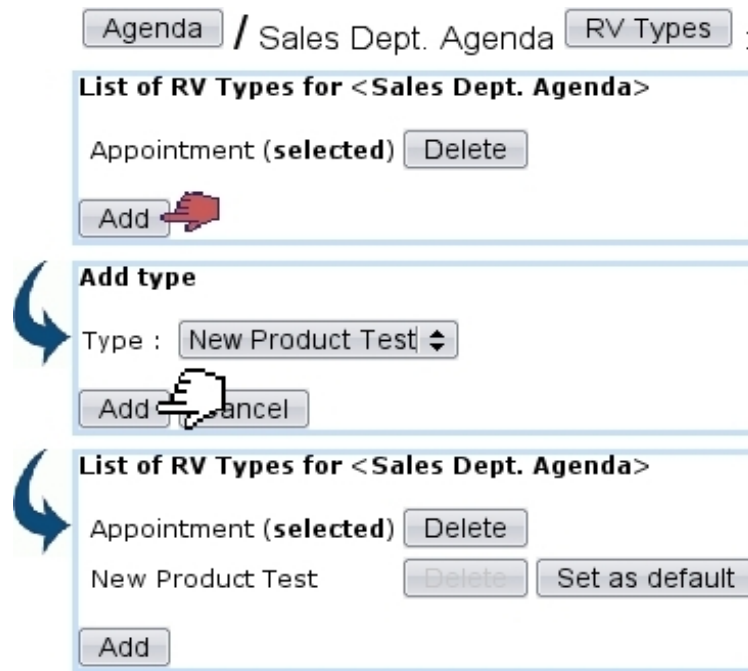


Figure 7.10: Adding the RV type 'New Product Testing' to the 'Sales Dept.' agenda.

#### 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*.

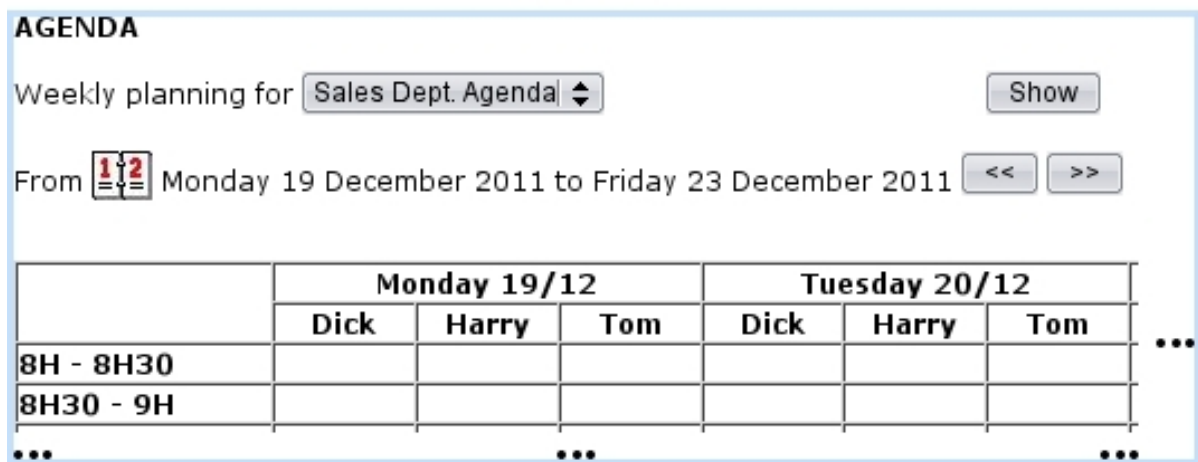
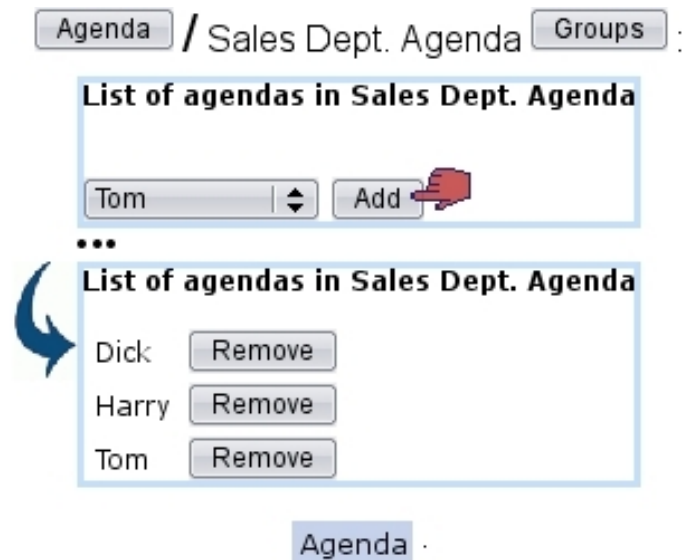


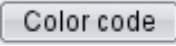
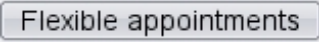
Figure 7.11: The own **agendas** of Tom, Dick and Harry are added into user-group-oriented 'Sales Dept. Agenda'; as a result, these three agendas are all featured when displaying the 'Sales Dept. Agenda'.

### 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) ;

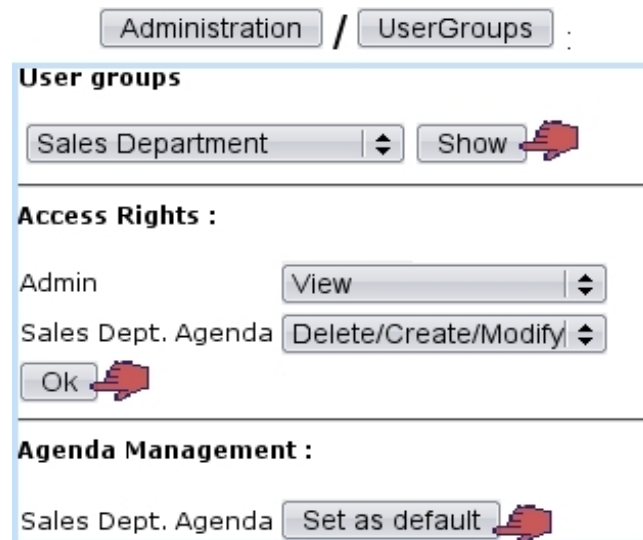


Figure 7.12: Setting the rights of a user group to agendas.



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

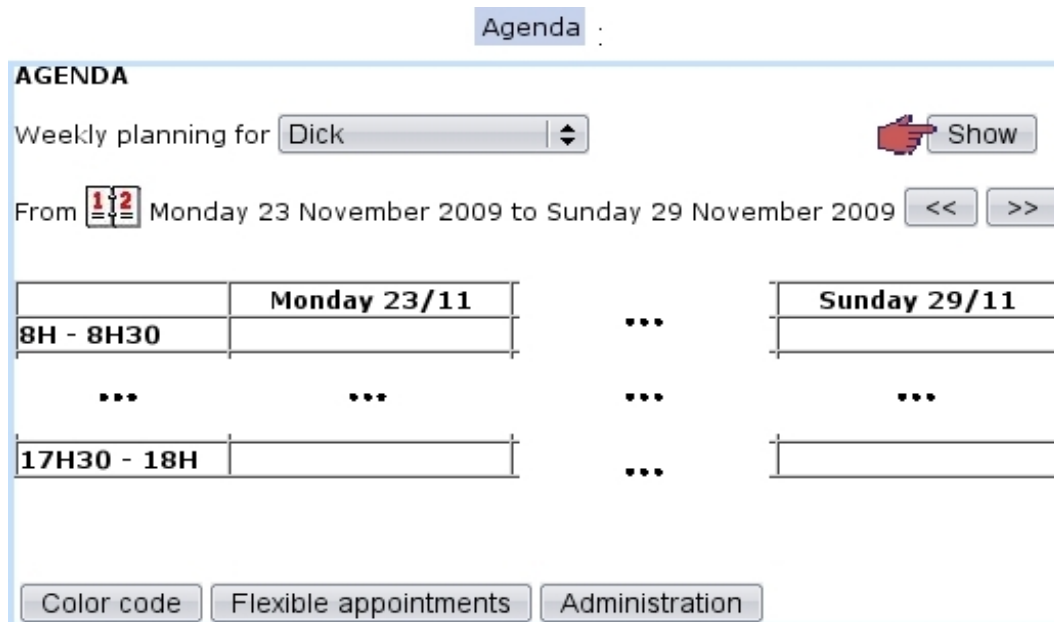


Figure 7.14: The *Main Agenda Page*.

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.

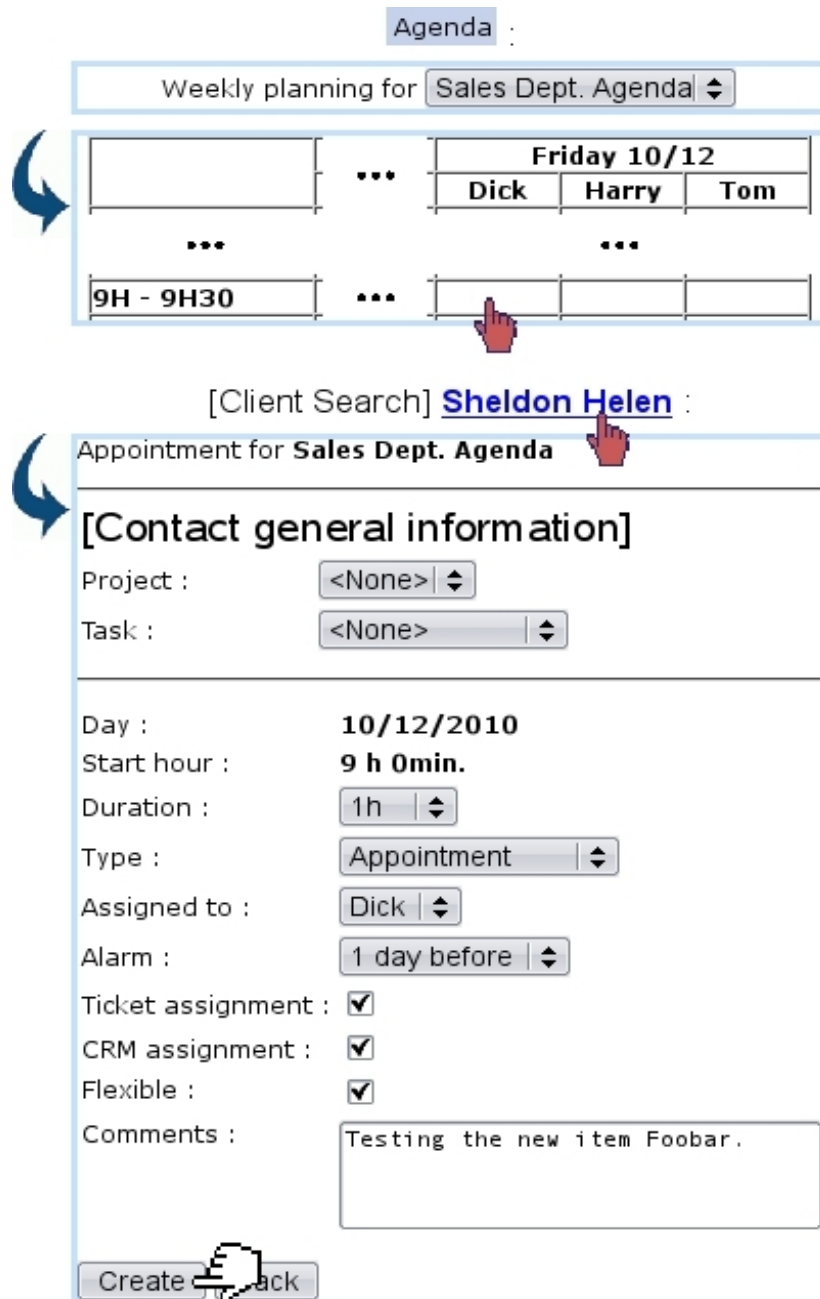


Figure 7.15: Adding an appointment for a client.

### 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-

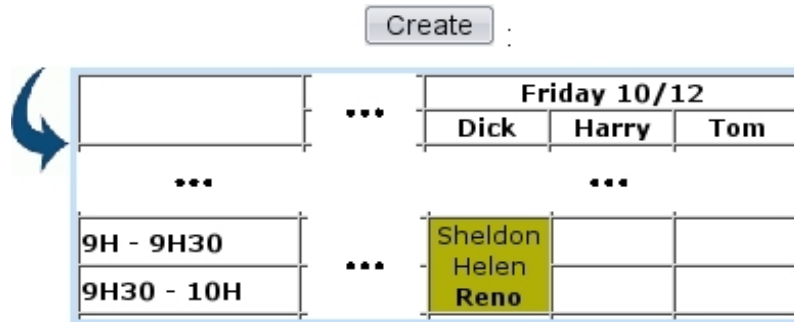


Figure 7.16: The now-scheduled appointment.

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

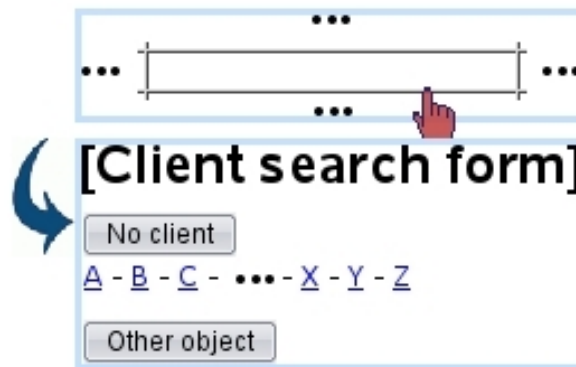


Figure 7.17: While the 'Other object' button is always available whatever agenda style is, the 'No client' one is only there if agenda style has optional client.

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.

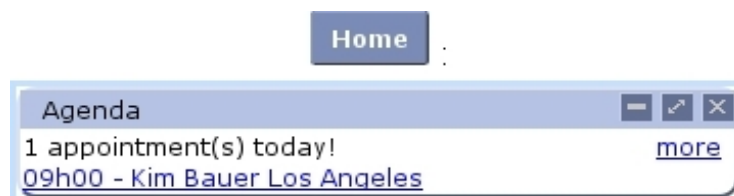


Figure 7.19: This appointment is imminent ; clicking on the [more](#) link will lead to the *Main Agenda Page* for the current week, while clicking on the link below "1 appointment(s) today !" will lead to the page for that very appointment.

### 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

**Create**

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 !	<a href="#">Modify</a>

**New alarm**

### 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.

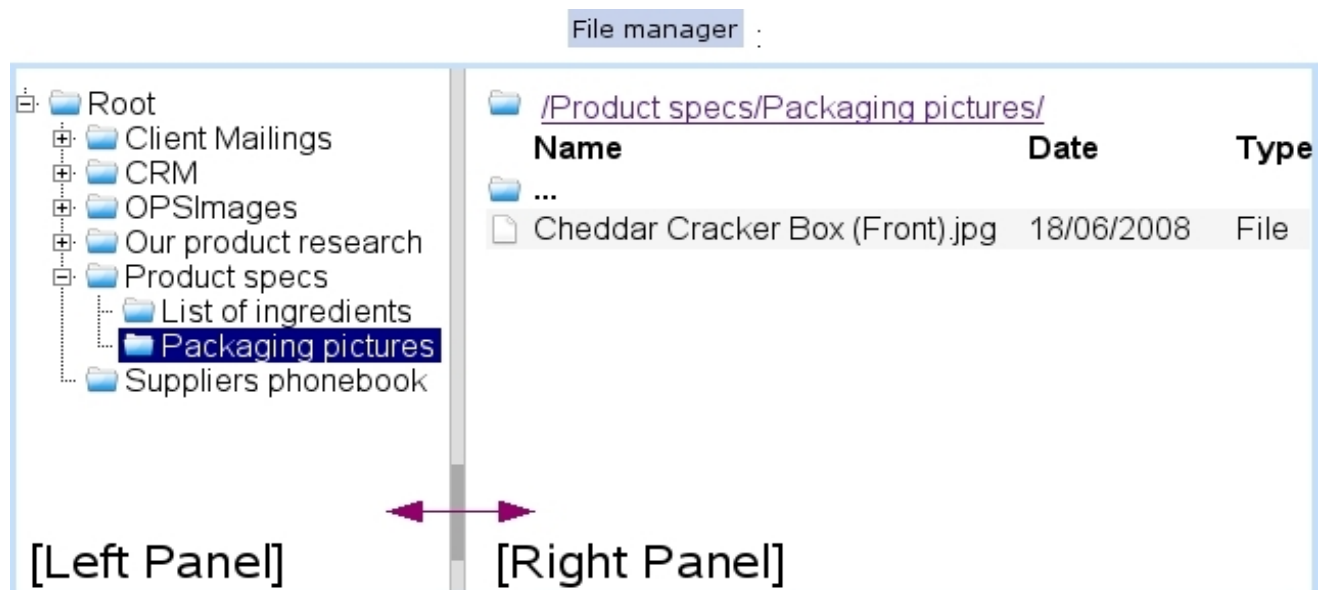





Figure 7.23: The *File Manager Page*.

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.

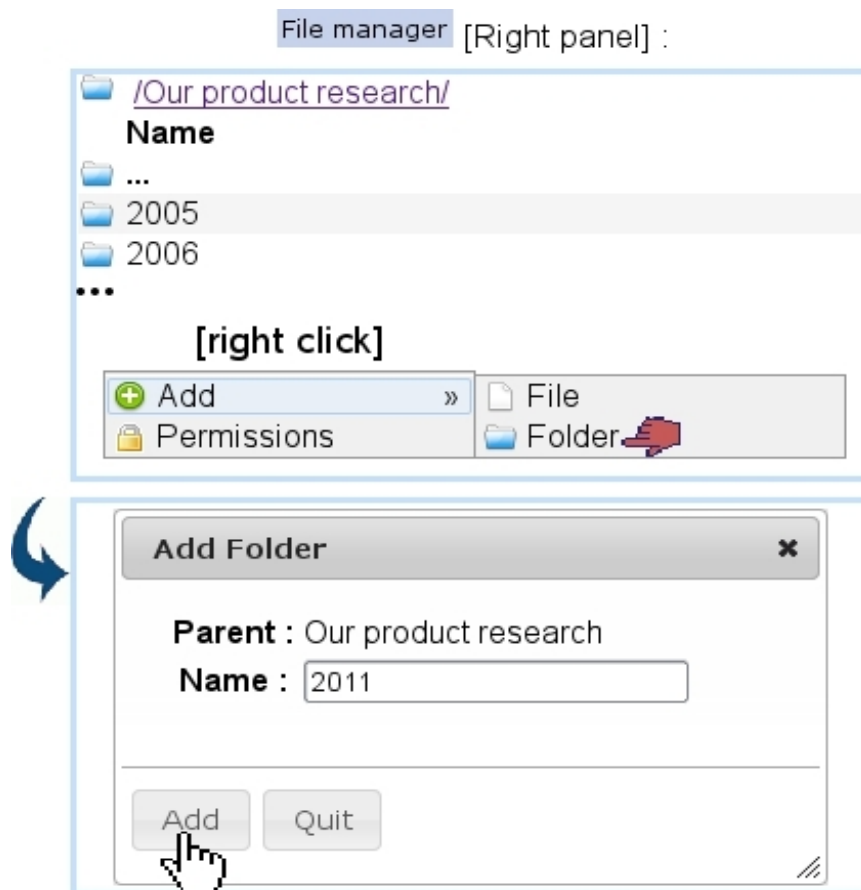
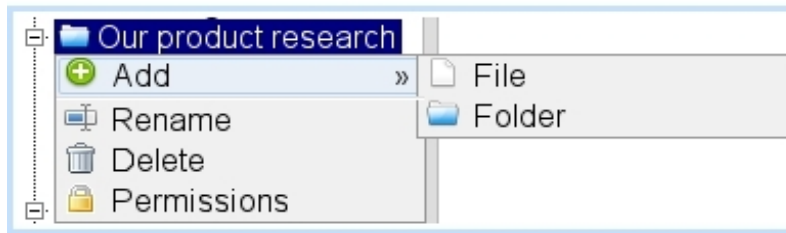


Figure 7.24: Creating the new folder '2011' at the 'Our product research' directory.

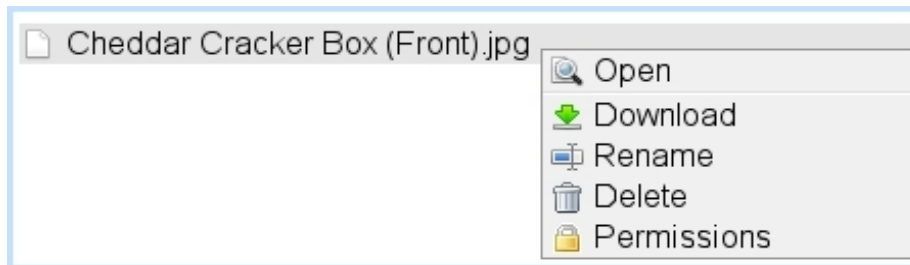
This folder could also be have been created from the left panel by a single click to highlight folder 'Our product research' and by then a right click :

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.

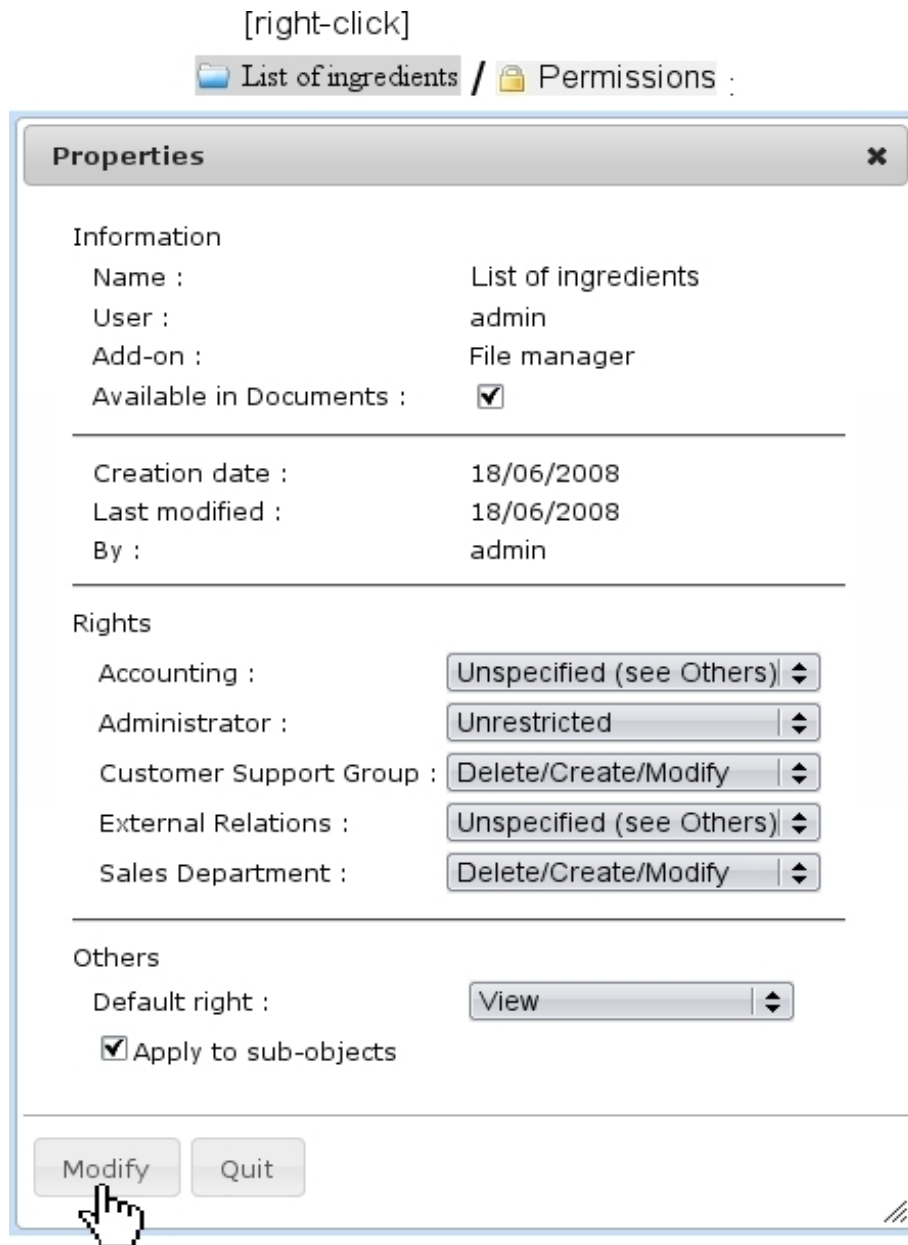


Figure 7.25: Setting the rights for the folder 'List of ingredients'.

## 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'.

Task List / Open list :

**Task list, Open list**

	Model	Start date	End date
<input checked="" type="checkbox"/>	Water fountains	12/09/2011	16/09/2011

**Task list**

Task list :  Status :  View :  User :

Date : from 1/9/2011  to 14/9/2011

Model	Start date	End date	Task	Exec date	Posting date	User
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Gen. cleaning	None	None	To be done by Jack Jones <input type="button" value="Update"/>
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Bottle mgmt	None	None	To be done by Jack Jones <input type="button" value="Update"/>

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 **Record** 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	
<a href="#">Water fountains</a>	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
<a href="#">Water fountains</a>	12/09/2011	16/09/2011	Closed	2/2 <b>View</b> <b>Modify</b>

**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.

Task List :

**Task list**

Task list : <All> Status : Closed View : User User : <All> Search

Date : from 1/9/2011 to 30/9/2011

Model	Task	Exec date	Posting date	User	
Water fountains	Gen. cleaning	23/09/2011	23/09/2011	Robert Zmuda	Update

**Task list, 'Water fountains', 'Gen. cleaning', Update**

From 19/09/2011 to 23/09/2011

Exec date : 16/9/2011 Posting date : 23/09/2011

User : <Unspecified> To be done by : Jack Jones

Comment : <None>  
 Tony Clifton  
 Thomas Hanson  
 Jack Jones  
 Jane Kovács

Modify

**Task list**

Task list : <All> Status : Open View : User User : <All> Search

Date : from 1/9/2011 to 30/9/2011

Model	Task	Exec date	Posting date	User	
Water fountains	Gen. cleaning	None	23/09/2011	To be done by Jack Jones	Update

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.

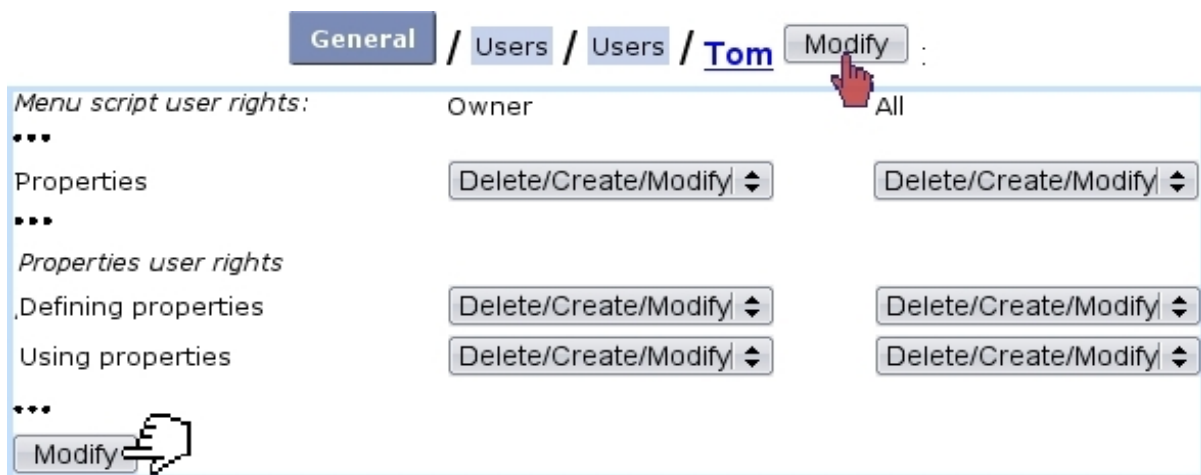


Figure 7.37: The user rights that rule Properties.

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 path "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**

<b>Username:</b>	Smith.John	<b>Subscription status:</b>	activated
<b>Title:</b>	Mr	<b>Active subscriptions:</b>	1
<b>Name:</b>	Smith	<input type="text" value="There is no property"/> <a href="#">More...</a>	
<b>First name:</b>	John		
<b>Address:</b>	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.

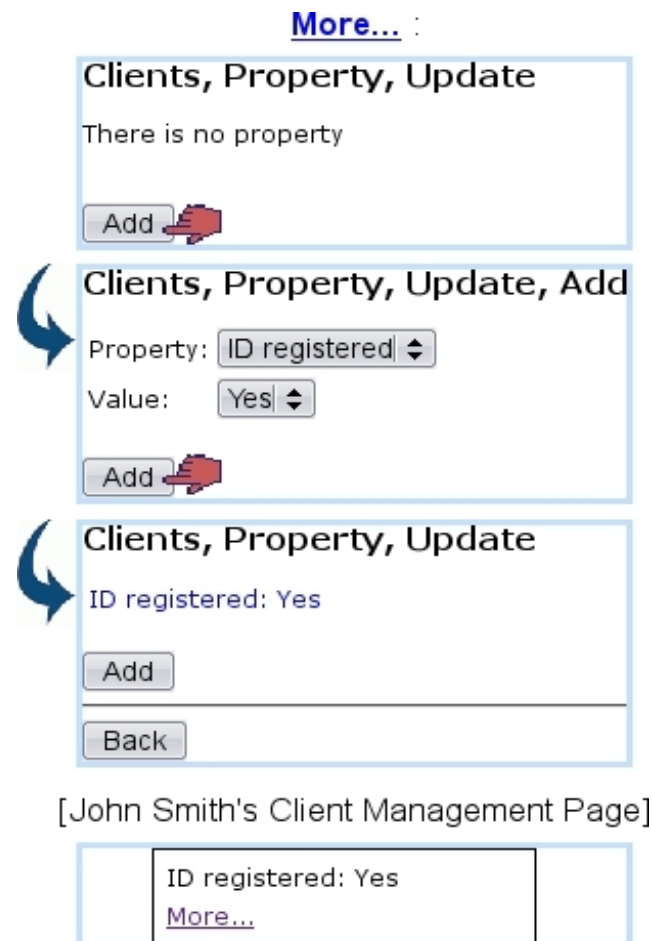


Figure 7.41: Setting the property 'ID registered' to 'Yes' for client John Smith.

### 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.

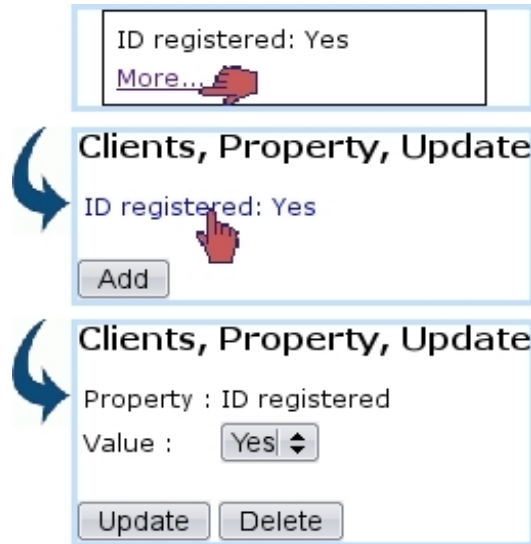


Figure 7.42: This allows a property to be changed or removed.

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*

## 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 re-



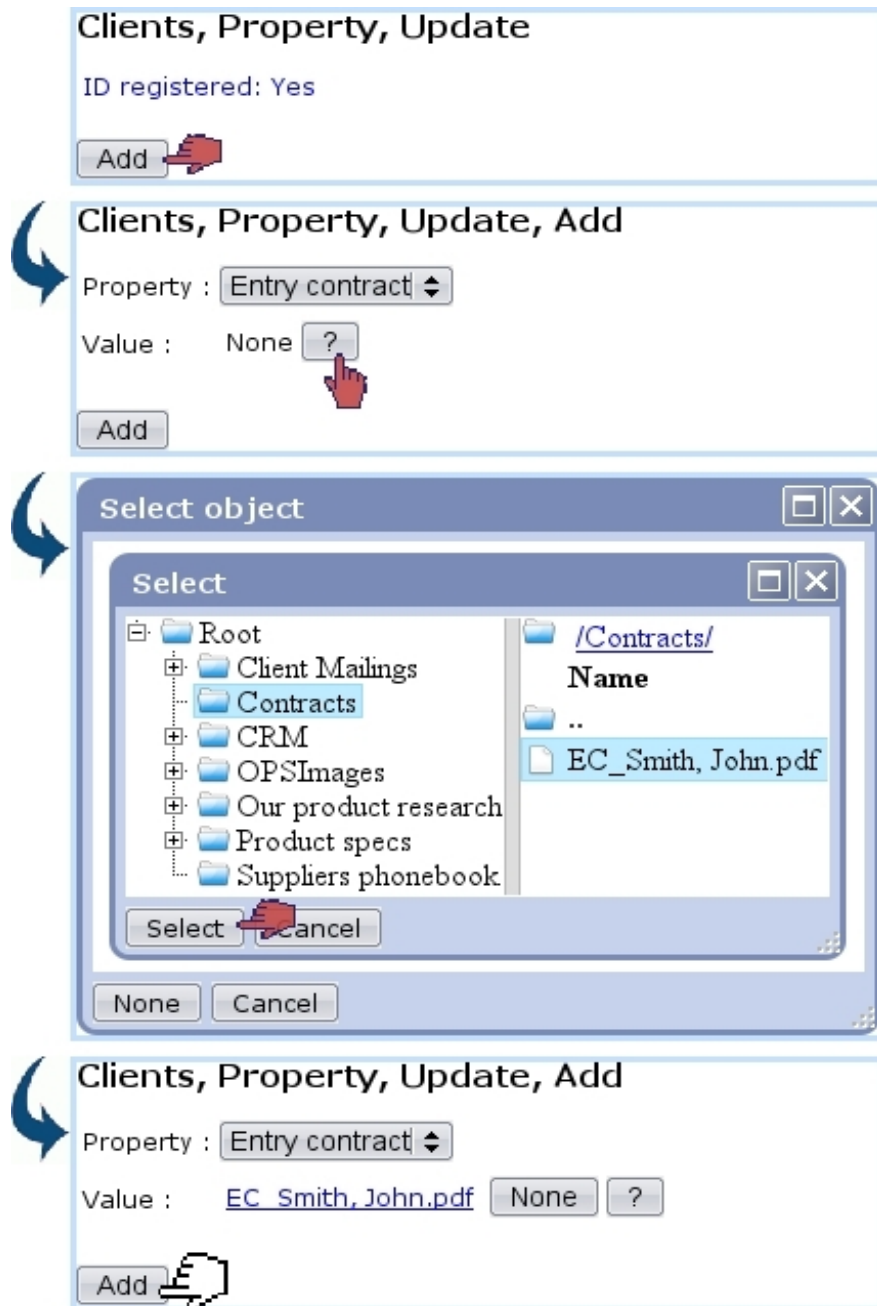


Figure 7.43: Adding an other property for a client.

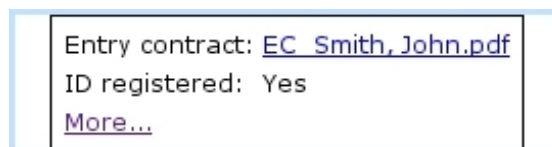



Figure 7.44: The two previously-set properties are now featured.

ceived/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 .


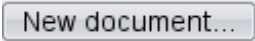


*Paperwork management access rights can be set up either at the Modify User Page (Fig.9.17) or the User Right Page (11.2) under the element*

*[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).

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).

Add-ons / Mail :

**Documents**

Clients :  ? - type : <any> state : <any>

treated : no archived : no ordered by : document date Show

Show attached : no Date : Creation

from **Monday 02 May 2011** to **Friday 06 May 2011**

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

Figure 7.45: The *Mail Management Page*.

### 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.

[Mail Management Page] :

Object name	Documents	Date	Access	Type	...
<a href="#">Tax Office</a>	<a href="#">Tax Form, 2011</a>	30/9/2011	4	Gen. Mailing - received	...
...	<b>Type</b>	<b>Modification</b>			
	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.

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.

### 7.7.3.1 Viewing/managing a mail document

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



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.

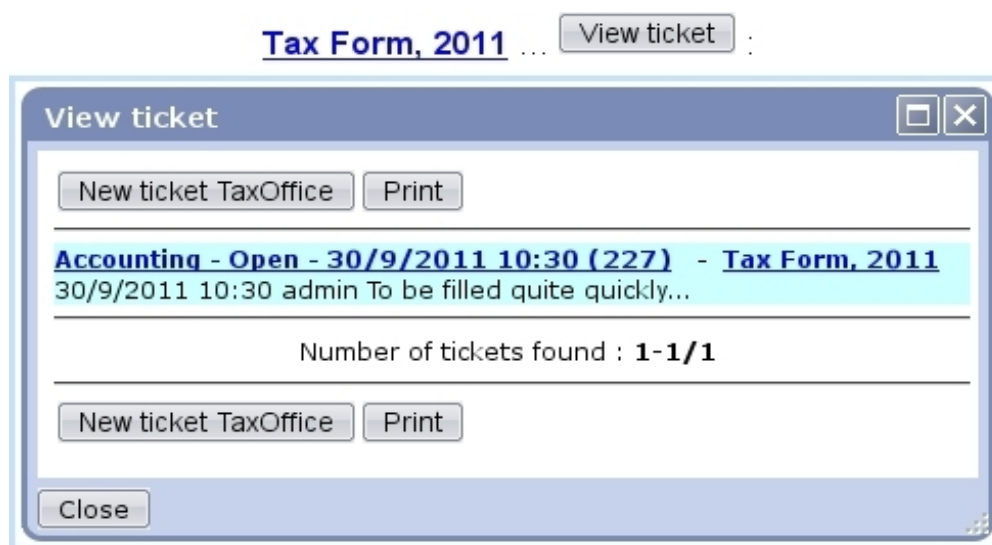


Figure 7.49: A short summary of the ticket created along the mail document ; from there, this associated ticket can be managed.

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.

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

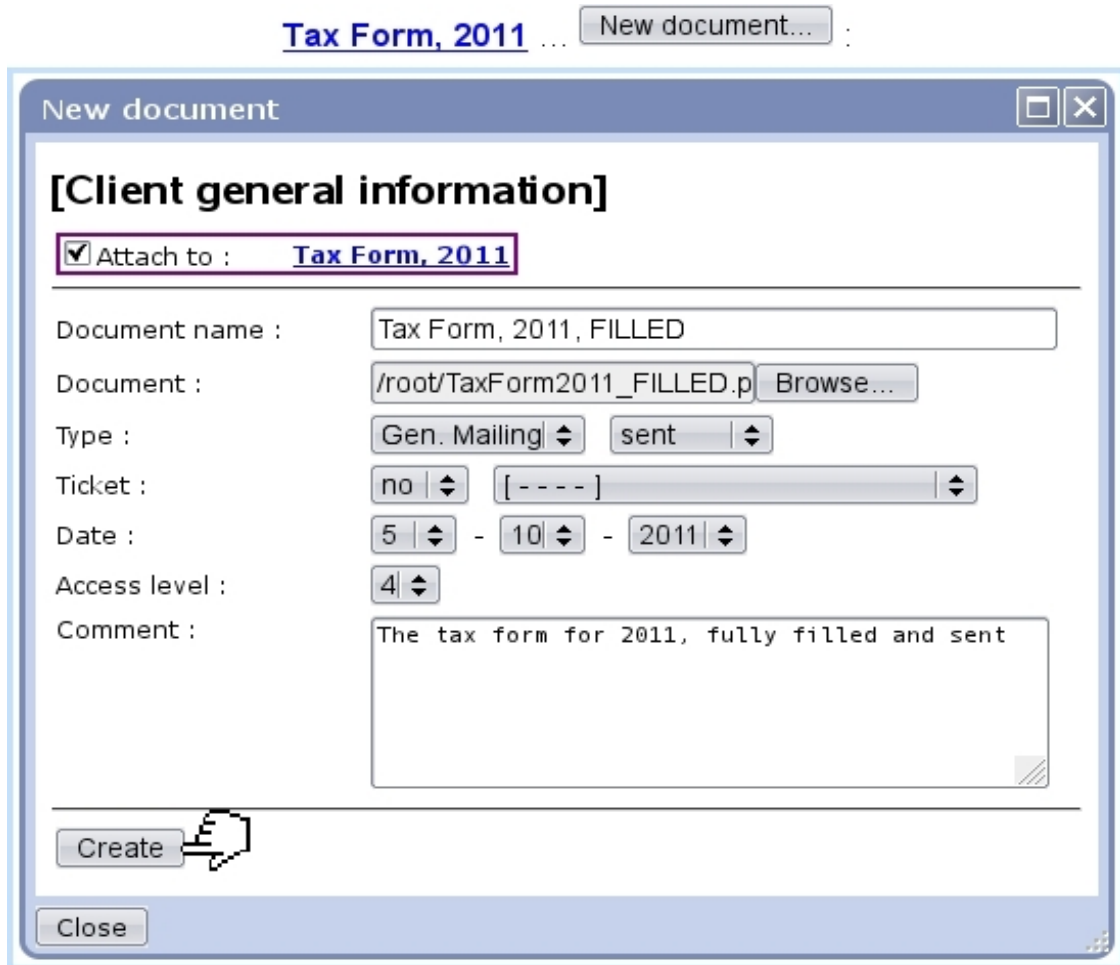


Figure 7.50: Attaching a reply to mail document 'Tax Form, 2011'.

#### 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.

#### 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



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

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.

### 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 ;





Figure 7.52: These are "linked" documents.

- 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]

## 7.9 Customer Relationship Manager (CRM)

The Client interface as lengthfully explained in the Client Management Chapter is vital, but one particular need that could surface in a company is still left unsatisfied : the possibility to manage client needs and client prospection.

Therefore, Blue Chameleon has designed an Customer Relationship Management tool as accessible via the eponymous submenu element in the  command group.

It mainly provides the following possibilities :

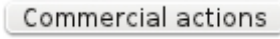
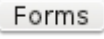
- relation-wise manage a potential client, known as a prospect (clients and prospects will be referred to in the following as 'contacts') ;
- send aimed campaigns (such as newsletters) to tactical contact lists ;
- send dedicated letters ;
- finely compose the documents related to those thanks to a handy, built-in document editor ;
- keep a record of all actions (campaigns, letters, appointments,...) pertaining to a particular contact and manage them through time.

### 7.9.1 Rights related to Customer Relationship Manager

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.53.

For this user :

[*Menu script user rights* :]

- CRM - Menu : rules the access to the CRM add-on ;
- CRM - Commercial actions : rules whether a  is available at the *Client Management Page* (2.3) for client-related action popup to be displayed ;
- CRM - Forms : rules whether a  is available at the *Client Management Page* (2.3) to generate client-related predefined forms (7.9.10).

The other rights as displayed under [*CRM user rights* :] rule the management (reading, creating, modifying and deleting) of CRM's components :

- Actions (7.9.4) ;
- contacts (7.9.3) and contact lists (7.9.3.5) ;
- campaigns (7.9.7) ;
- letters (7.9.9) ;
- predefined form models (7.9.10).

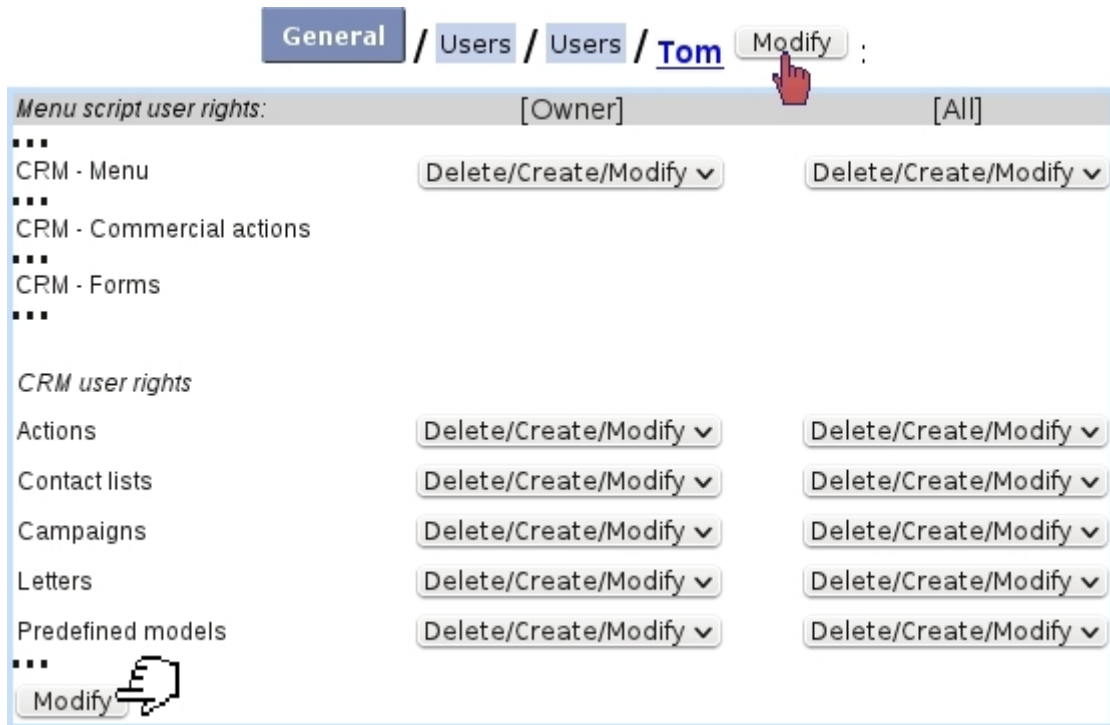


Figure 7.53: The user rights that rule Customer Relationship Manager.

## 7.9.2 CRM's Main Page



Figure 7.54: CRM's Main Page.

It is accessed via **Add-ons** / **CRM** and is featured at Fig.7.54.

There, a list of actions along with search tools (shown in a more detailed way at 7.9.6) is featured ; below, several buttons are available to access CRM's different components (they are available according to user's rights as explained above) :

- contacts (7.9.3) ;

- contact lists (7.9.3.5) ;
- campaigns (7.9.7) ;
- letters (7.9.9) ;
- predefined form models (7.9.10) ;
- statistics (7.9.11).

### 7.9.3 Contact managing

Everything related to the management of contacts (including the lists gathering them) is cleared up below.

#### 7.9.3.1 Adding a prospect

Prospects are added through **CRM** / **Contacts** / **Add a contact** ; the 'prospect' status is featured on the creating form (Fig.7.55).

#### 7.9.3.2 Uploading a list of prospects

It is also possible to upload a list of prospects via the means a file, which an example is given at Fig.7.56 : line by line, diverse information such as prospect's title, name, address,... are given, and the first line serves as to indicate the nature of the information.

Then, via **Contacts** / **Upload CSV file**, this very file is uploaded and CRM provides menus to indicate how each information given in the first line of the file will be taken as.

Clicking on **Ok** then leads to the *Preview Page* as featured in Fig.7.57, where the upload can be verified and finally validated.

#### 7.9.3.3 Upgrading a prospect

Should a prospect become one day a full-fledged client, this prospect's edit window (as attained through a contact search via **Modify**) features a **Migrate as new client** button that will create a new client file with the prospect's data.

#### 7.9.3.4 Searching for contacts

Contacts can be looked for via **CRM** / **Contacts**. There, as featured in Fig.7.58, a search tool very similar to the one in a *Search Client Page* (except that a drop-down menu allows to filter search by clients or prospects or both of them) provides several search criteria.

Prospects appear there in a light mauve background while regular clients appear in a grey one.

CRM / Contacts / Add a contact :

Add a contact

Company :	<input type="text"/>	**
Title :	<input type="text" value="Mr"/>	
Name :	<input type="text" value="Stagger"/>	**
First name :	<input type="text" value="Lee"/>	
Type :	<b>Prospects</b>	
Address :	<input type="text" value="10 O'Maley Street"/>	*
	<input type="text"/>	
City :	<input type="text" value="Los Angeles"/>	*
Zip code/Country :	<input type="text" value="90000"/>	* <input type="text" value="USA"/>
Phone/Mobile :	<input type="text" value="555 9510"/>	* <input type="text"/>
Office/Fax :	<input type="text" value="555 0101"/>	<input type="text"/>
E-Mail :	<input type="text"/>	
Language :	<input type="text" value="English"/>	
Comment :	<input type="text" value="This potential client is very interested in our products."/>	

(\*) required  
(\*\*) Name or company required

Figure 7.55: Adding a prospect.

A click on a client/prospect name displays in a pop-up windows her/his personal information. General information is featured such as city, zip, phone numbers... is featured ; also, if there is any, the next action (7.9.4) that as to be done for her/him.

The salesperson in charge for each contact (7.9.3.6), if s/he exists, is also featured.

As for buttons at the right, they allow to :

- : displays the list of actions done on this contact (7.9.6.1) ;
- : create a new action on this contact (7.9.4.1) ;
- : create a new 'information' on this contact (7.9.5) ;
- : view individual letters sent to this contact (7.9.9) ;

Prospects.csv:

```
company;title;name;first name;address;city;zip;country;phone;mail;language
Albatross INC;Miss;Berg;Lucia;11 Bungee Rd;Seattle;98100;US;5550203;berg@mailserv.com;EN
;Mr;Black;Chet;23 Beaver Ave;Fargo;58100;US;5556666;blackie@mailserv.com;EN
```

Contacts / Upload CSV file :

File (below 1000 lines) : /root/Prospects.csv

company :  ▾

title :  ▾

name :  ▾

first name :  ▾

address :  ▾

city :  ▾

zip :  ▾

country :  ▾

phone :  ▾

mail :  ▾

language :  ▾

Figure 7.56: A Prospects.csv file, listing prospect data its own way is uploaded to CRM, on which matchings are made between the file's information (on the left, retrieved from its first line) and CRM's own prospect data presentation (menus on the right).

- (for prospects only) : editing a prospect's general information, similarly as seen in Fig.7.55 (for modifying a client's general information, go at her/his *Client Management Page*).

### 7.9.3.5 Creating contact lists

According to common features shared by certain contacts (living in the same area,...), they can be gathered into contact lists, as shown in Fig.7.59. Then, on the page accessed via , this newly created contact list can be displayed through a search.

In a process shown at Fig.7.60, contacts finally are added thanks to a search led in this case on the city.

Once created, a contact list's contents can be viewed via (in this example)

[Preview Page] :

Preview of the 10 first contacts in list before CSV import

Ok  Cancel

<b>1 - Albatross INC Miss BERG Lucia</b>	
Address	<b>11 Bungee Rd</b>
	<b>98100 Seattle - USA</b>
Language	<b>English</b>
Tel	<b>5550203</b>
Mobile	
Fax	
Email	<b>berg@mailserv.com</b>
Category	<b>Default</b>
Comment	

---

<b>2 - Mr BLACK Chet</b>	
Address	<b>23 Beaver Ave</b>
	<b>58100 Fargo - USA</b>
Language	<b>English</b>
Tel	<b>5556666</b>
Mobile	
Fax	
Email	<b>blackie@mailserv.com</b>
Category	<b>Default</b>
Comment	

Figure 7.57: This *Preview Page* shows that the prospect data has been rightly imported.

/  / [L.A. residents.](#)

Also, contacts can be ed anytime in a similar way as above via [Modify](#) ; there, contacts can be individually unchecked to be removed from the list.

Finally, it is possible to [Delete](#) a list provided it does not contain any contacts.

**7.9.3.5.1 Creating/expanding a contact list via an upload** It is also possible, for a already-created contact list, to upload a CSV file of contacts via [Modify](#) /  . The uploading process is then similar as described in 7.9.3.2.

If contact list already contained contacts, the uploaded contacts are appended at the end of the list.



Contacts :

**Contacts**

Search contacts by :

Name/Company :  Zip code/City :

Address :  Tel :

Email :  Type / Language :

Name	City (Zip code)	Country	Tel	Mobile	Salesperson	To do				
<a href="#">Salazar Ramon</a>	Albuquerque (87100)	USA	555 6666		-	-	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Scofield Michael</a>	Los Angeles (90000)	USA	555 8523		-	Visit	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Seranescu Pompilius</a>	BH (90210)	USA			-	Appointment	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Sheldon Helen</a>	Reno (89000)	USA	555 4563		-	Email	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">Smith John</a>	Los Angeles (90000)	USA	555 1234	6666666	-	-	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/>
<a href="#">STAGGER Lee</a>	Los Angeles (90000)	USA	5559510	62100000	-	Call	<input type="button" value="Actions"/>	<input type="button" value="Add action"/>	<input type="button" value="Add info"/>	<input type="button" value="Letters"/> <input type="button" value="Modify"/>

Figure 7.58: Looking for clients and prospects whose name begins by 'S' inside the contact database.

Contact lists / Add :

**Add a contact list** □ ×

Name :

Comments :

**Contact lists**

User :  - Title :  - Order by :  -

Title	Contacts	User	Creation	Modification	Usage	Owner	
<a href="#">L.A. Residents</a>	0	Jones Jack	28/10/2008 15:14	28/10/2008 15:14	n.a.	CRM	<input type="button" value="Modify"/> <input type="button" value="Delete"/>

Figure 7.59: Creating a contact list aimed to gather contacts living in the same city.

### 7.9.3.6 Salesperson in charge of a contact

CRM, in general, is a sales-oriented aspect of a company ; therefore, a dedicated salesperson (9.6.1) might often follow a prospect, from creation to commercial actions. Blue Chameleon's CRM module features this salesperson anytime a list of contacts is displayed, as it can be seen on Fig.7.58.

Add contacts :

### Add existing contacts to contact list

**Contacts**

Search contacts by :

Name/Company :  Zip code/City :

Address :  Tel :

Email :  Type / Language :

	Name	City (Zip code)	Country	Tel	Mobile
<input checked="" type="checkbox"/>	Barnes Cletus	Los Angeles (90000)	USA	1	1
<input checked="" type="checkbox"/>	Bauer Kim	Los Angeles (90000)	USA	555 4525	
<input checked="" type="checkbox"/>	Durden Tyler	Los Angeles (90000)	USA		
<input checked="" type="checkbox"/>	Paper Street Soap Company	Los Angeles (90000)	USA	555 6669	
<input checked="" type="checkbox"/>	Parker Ken	Los Angeles (90000)	USA	555 6363	
<input checked="" type="checkbox"/>	Scofield Michael	Los Angeles (90000)	USA	555 8523	
<input checked="" type="checkbox"/>	Smith John	Los Angeles (90000)	USA	555 1234	6666666
<input checked="" type="checkbox"/>	STAGGER Lee	Los Angeles (90000)	USA	5559510	62100000




Figure 7.60: Adding contacts to a contact list.

Setting or changing the salesperson in charge of a contact is done when an action is taken on a contact, as described next.


## 7.9.4 Actions

An 'action', in the Customer Relationship Manager context, is any deed that is accomplished on a contact, whether performed by yourself (phonecall, appointment,...) or processed by Blue Chameleon (sending of campaigns and letters), where it is labeled as a 'system action'.


In order to always follow closely a contact, actions are kept in record and may be edited, in the way of comment adding and due date editing.

Also, Blue Chameleon's strong feature for this matter is that distinction is made between past and future actions, the latter being dutifully reminded thanks to a dedicated CRM event control at your desktop (1.3 on how to set it).

### 7.9.4.1 Taking an action on a contact

As shown in Fig.7.58, after a contact search, a  button is available besides each contact.

Upon click, as displayed at Fig.7.61 :

- the current salesperson in charge of this contact is shown at the top ; in the current example, none is yet, so user Thomas Hanson (who has been set as a salesman, 9.6.1) checks the box 'Attribute contact to me' ;
- the status of the action (whether is to do or it has already been done) is set ;
- the action type (see details at 7.9.4.1.1 below) is set ;
- a date and time for this action are set thanks to the dedicated calendar icon  (7.9.4.2.1) ;
- a comment, describing the action, is writtem

Actions can also be created when an Agenda appointment is added (7.2.3.1), provided that the corresponding agenda supports CRM assignment (7.2.2.3.1).

**7.9.4.1.1 Types of actions** The 'Action type :' menu as found when creating (or modifying) an action contains the following choices :

- letter ;
- Email ;
- SMS ;
- Call ;
- Appointment ;

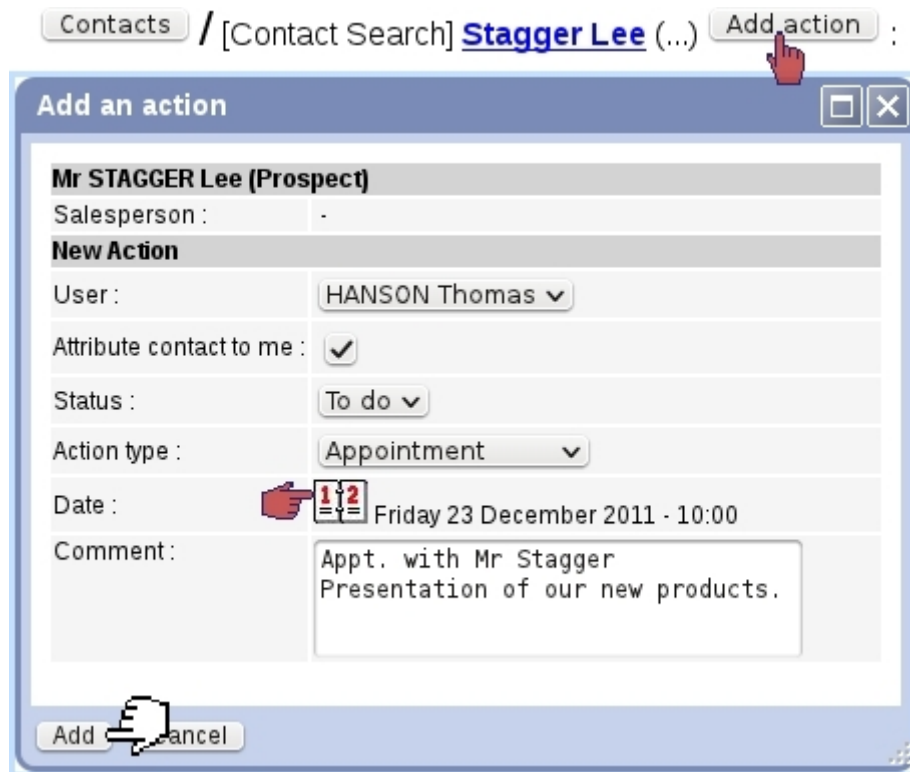


Figure 7.61: Registering an appointment taken with a contact ; the due date as it appears has been set in the way described at Fig.7.62.

- Visit (i.e., in opposition to an appointment, the contact has come her/himself to the company) ;
- Migration to client (as an action to do manually, 7.9.3.3).

#### 7.9.4.2 Managing past and future actions

Blue Chameleon's Customer Relationship Manager makes the distinction between actions that have been accomplished and action that still remain to be done. Once added as described in 7.9.4.1, it is possible to edit an action, in the ways described at 7.9.4.2.2.


**7.9.4.2.1 The Action calendar : scheduling actions** This calendar is brought up via the  icon as found next to an action date, in the context of action creation (Fig.7.61) or modifying (Fig.7.65).

Fig.7.62 shows for instance how a due date is scheduled while creating a new action. In this example, action is created on December, 16 and it concerns an appointment with a prospect that is meant to happen on December, 23 at 10 AM :

1. the calendar is displayed : the current date and time appear on the monthly view and time sliders;
2. December, 23 is then selected, and so is the time of the appointment ;



Figure 7.62: Setting the right date and time for a future action.

3. the appointment with the prospect now appears with the right date and time.

**7.9.4.2.2 Editing actions : examples** Blue Chameleon's Customer Relationship Manager ensures a great flexibility when it comes to actions. For instance, the following deeds are rendered possible :

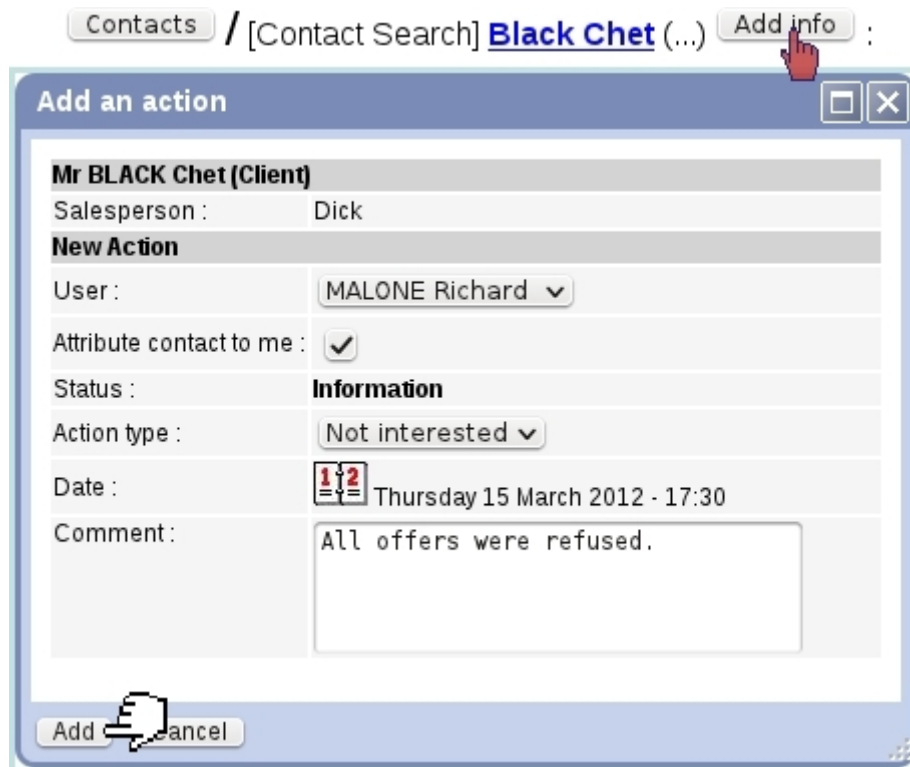
- if an action has been achieved without having been even created in the first place, it is still possible to create it. The creation process will remain the same, and the corresponding date (in the past) and time will be chosen. Also, it is possible to record an action that has been done in the past by just setting the right date and time ;
- postpone the due date and/or time of an action, even on the very day the action was due to happen, or after ;
- advance its due date and/or time, even, for example, schedule a future action on the current day ;
- update its commentary : for instance, after an appointment or a call has been made with a contact, write down the results of the meeting.

The editing of an action is most conveniently done from the page where actions can be searched and displayed (i.e. CRM's Main Page), as detailed next.

## 7.9.5 'Information' actions

'Information' actions, in opposition to the 'normal' actions as created above, just aim to feature some current status of the prospect, for instance whether s/he is not interested.

As featured at Fig.7.63, such an action is created for instance also after a contact search (7.58), this time through the **Add info** button ; data to input is similar as for a normal action, except that there is no 'To do/Done' menu.



The screenshot shows a software interface for adding an action to a contact. At the top, there is a breadcrumb trail: 'Contacts / [Contact Search] Black Chet (...) Add info :'. A red hand cursor is pointing at the 'Add info' button. Below this is a dialog box titled 'Add an action' with a close button (X) in the top right corner. The dialog contains the following information:

- Mr BLACK Chet (Client)**
- Salesperson : Dick
- New Action**
- User : MALONE Richard (dropdown menu)
- Attribute contact to me :
- Status : **Information**
- Action type : Not interested (dropdown menu)
- Date :  Thursday 15 March 2012 - 17:30
- Comment : All offers were refused. (text area)

At the bottom of the dialog, there are two buttons: 'Add' and 'Cancel'. A hand cursor is pointing at the 'Add' button.

Figure 7.63: Indicating an information upon a prospect's state.

Available information types are :

- Interested ;
- Not interested ;
- Misc.

## 7.9.6 Looking for actions

The Main CRM Page (7.9.2), as now detailed in Fig.7.64, features all actions remaining to be done by the current, along with various search menus tool as featured where it is possible to look for actions with various search criteria :

- the issuing user, if rights for Actions ('All') are sufficient ;

- the related contact, along a search string featured in her/his name ;
- the status of the action : To do, Done, System action (i.e. sent campaigns, letters, and validated migrations to client), and 'Information' actions (7.9.5) ;
- also, displaying a certain number of actions and ordering them along date, status or user.

CRM :

**Actions**

User: JONES Jack - Contact: - Status: To do - Type: Call - Search

Displayed actions: 25 - Order by: Date

Date	User	Contact	Action	Status	Type	
28/12/2011 10:30	Jones Jack	<a href="#">STAGGER Lee</a>	Call for a satisfaction p...	To do	Call	Modify Done Action Information
27/12/2011 16:00	Jones Jack	<a href="#">Scofield Michael</a>	Mitigate complaint.	To do	Call	Modify Done Action Information

Actions 1-2/2

Contacts Contact lists Campaigns Letters Predefined models Statistics

Figure 7.64: This displays for instance all phone-call actions remaining to be done.

From there, for an action :

- **Modify** allows the action to be updated (Fig.7.65) ;
- **Done** (only for 'normal' actions that are still to do) declares this action as 'Done' ;
- **Action** shows the popup to add a 'normal' action (7.9.4.1), preset to the related contact and action type of the line ;
- **Information** shows the popup to add an 'Information' action (7.9.5), preset to the related contact of the line.

### 7.9.6.1 List of actions for a contact

While on a list of contacts where the **Actions** button is available (for instance as seen on Fig.7.58), this button leads to a similar page as the action search page as detailed above except it is dedicated to that very contact.

If the CRM event control has been enabled (1.3), it is possible then, as shown on Fig.7.66, to remind what actions have to be done in the near future.

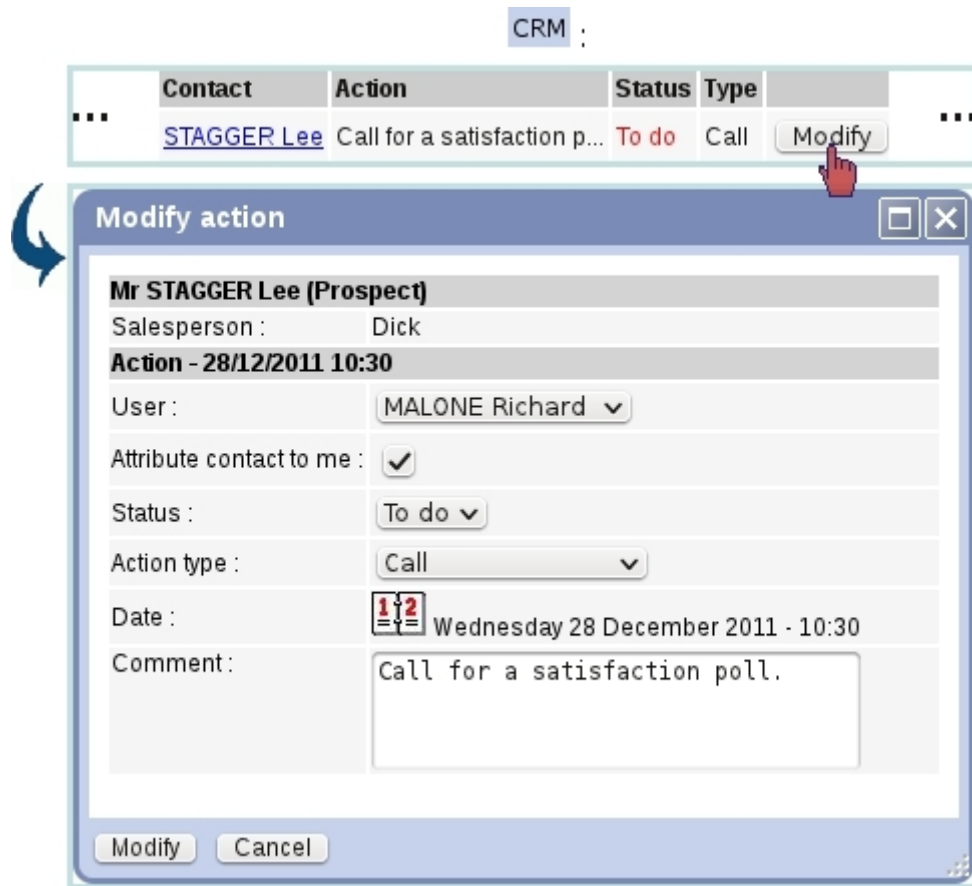


Figure 7.65: An action can be modified and updated anytime.

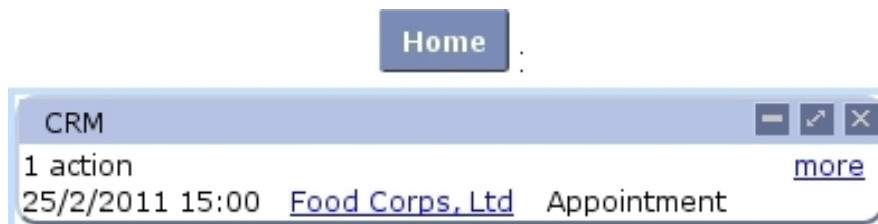


Figure 7.66: The CRM event control, here reminding that an appointment with a client is scheduled.

Clicking on the [Client Name](#) leads to the page where all actions for this contact are displayed, while the [more](#) link simply leads to the 'normal' CRM Main Page.



## 7.9.7 Postal campaigns

Blue Chameleon's CRM tool enables to generate mass mailing campaigns to contact lists. It also integrates a Document Editor, allowing to create model documents. Its use is explained at 13.1.

### 7.9.7.1 Adding a new postal campaign

Fig.7.67 shows how to create a new postal campaign : on the pop-up window as displayed via **Campaigns** / **Add a campaign** , pick user and type (in the following example, 'Postal campaign') and fill in its title.



Figure 7.67: Creating a new postal campaign.

Campaigns, on their main page, can be searched along creating user, title (or part thereof), type (postal/electronic) and status ; campagne results can be ordered by :

- creation date ;
- title ;
- user ;
- type.

This newly-created campaign is assessed the state 'opened' and has still no contacts nor associated documents. A campaign can then be modified and assessed contacts and documents via, as pictured in Fig.7.68, a click on its name (a campaign can be searched anytime via a dedicated search tool). There, several buttons enable to enrich this campaign with contacts as well as documents as explained below.

[Campaign Search] [New Offer for L.A. Residents !!](#) :

**Campaign : View/Modify**

**Campaign : New Offer for L.A. Residents !!**

User : **Jones Jack**

Type : **Postal campaign**

Title : **New Offer for L.A. Residents !!**

Status : **Opened**

**Contact list**

<No contact>

**Document**

Figure 7.68: This page allows to manage a campaign (for which, currently, no contact list nor document have been added).

### 7.9.7.2 Adding a contact list to a postal campaign

Through the  button as seen in Fig.7.68, contacts are added to campaign in a simple way pictured at Fig.7.69.

/ [Campaign Search] [New Offer for L.A. Residents !!](#) /  :

**Choose contact list** □ ×

User :  - Title :  -

	Title	Contacts	Modification	User
<input checked="" type="radio"/>	L.A. Residents	8 (1 prospect(s), 7 client(s))	20/1/2012 11:55	Jack Jones

**Contact list**

[L.A. Residents - 8 contact\(s\)](#) (1 prospect(s), 7 client(s))

Figure 7.69: Adding the right contact list (7.9.3.5) to a postal campaign.

### 7.9.7.3 Adding a document to a postal campaign

A model document is what will be sent or printed out for this campaign. If no model document was created for this specific campaign, click on **New model** and follow the how-to as described in 13.3.1.

To upload an already-existing model document, click on **Select model** as available at the *Campaign Manage Page* (Fig.7.68). Then, a File Manager window as described in 7.4 will be displayed, where an already-existing model document is selected ; via a click, it can also be modified and expanded through the Document Editor : see 13.1 for the Document Editor general use.

Whether created or selected, as shown for instance on Fig.7.70, document's name finally appears at the *Campaign Manage Page* ; clicking on it allows to view and modify it via the Document Editor. It is also possible to **Generate PDF file** for this campaign document : once PDF generation is done, it becomes possible to see the PDF file to be printed out via **Print PDF file**. If result was not satisfactory, **Remove PDF file** can be used to delete it.

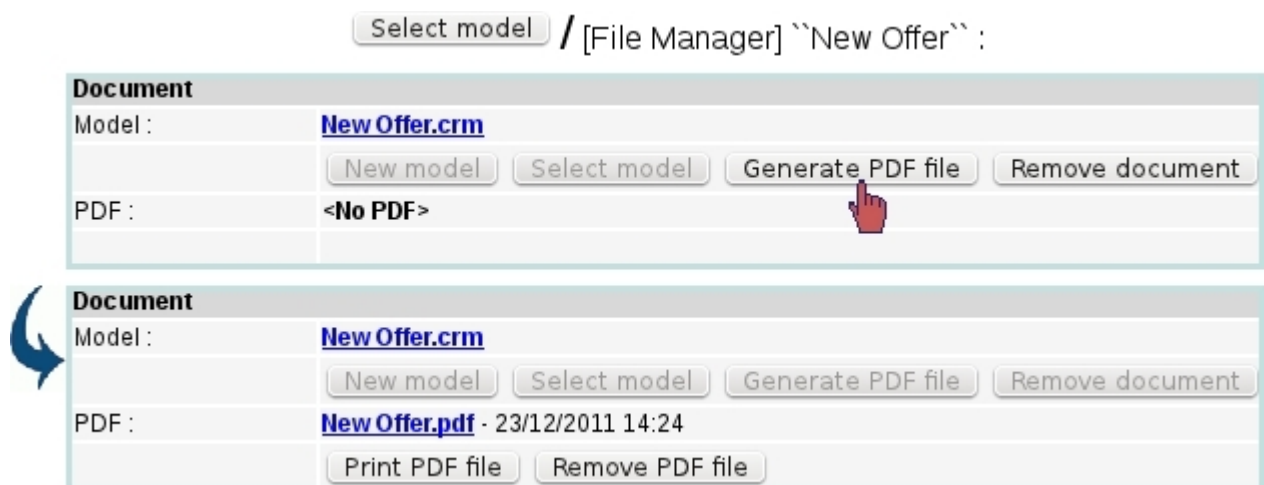


Figure 7.70: Uploading the model document "New Offer" (see 13.3 for details on its creation) and generating the corresponding PDF file.

### 7.9.7.4 Marking a postal campaign as 'sent'

Once you printed out the PDF file as generated through **Print PDF file** and sent the sheets to your contacts, follow the process as shown on Fig.7.71 to mark this campaign as 'sent'.

[After postal campaign has been printed out and sent] :

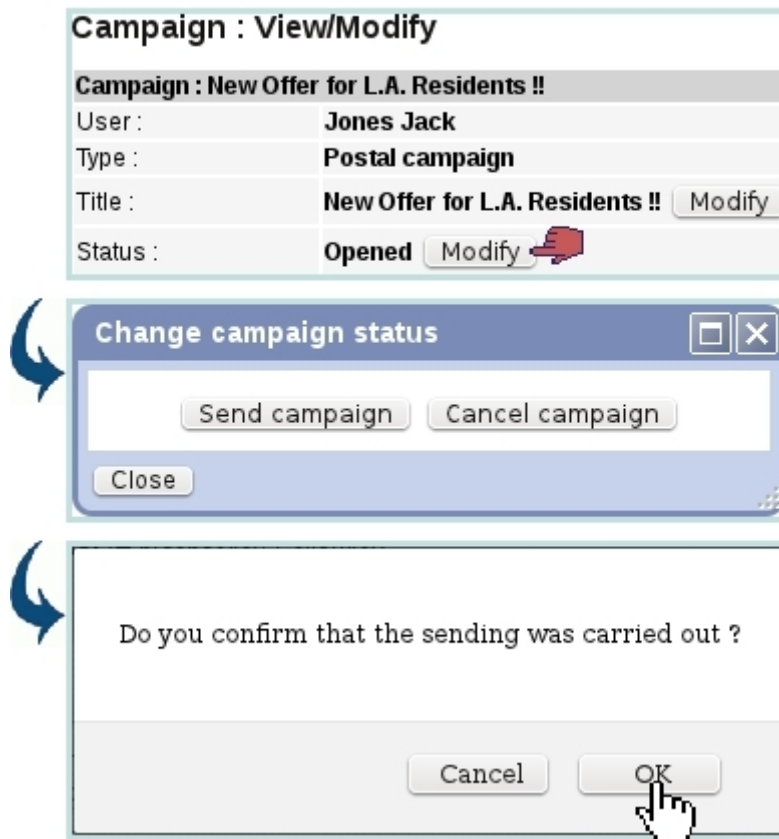


Figure 7.71: Marking as postal campaign as 'sent'.

#### 7.9.7.5 Duplicating a sent postal campaign

The *Campaign Manage Page* (7.68) for a sent campaign features a **Duplicate** button allowing to make a copy of that campaign, in a process shown at Fig.7.72. This new campaign can then be renamed via the **Modify** button.

This new campaign contains as default the contact list and model document of the campaign it has been copied from, but it can be changed respectively via **Choose** and **Remove document**.

#### 7.9.7.6 Canceling an unsent postal campaign

If there is need to abort a yet unsent campaign, the **Cancel campaign** button as seen in Fig.7.71 will be used. The cancelled campaign still remains in the list of campaigns and can be duplicated.

### 7.9.8 Electronic campaigns

Electronic campaigns are managed in a very similar way as postal ones (7.9.7) ; instead of paper mails, campaign is dispatched to the contacts via their emails. This functionality

[After postal campaign has been declared 'sent'] :

Campaign : New Offer for L.A. Residents !!	
User :	Jones Jack
Type :	Postal campaign
Title :	New Offer for L.A. Residents !!
Status :	Sent - 23/12/2011 Duplicate

Campaign : Copy of New Offer for L.A. Residents !!	
User :	Jones Jack
Type :	Postal campaign
Title :	Copy of New Offer for L.A. Residents !! Modify
Status :	Opened Modify

Campaign : Copy of New Offer for L.A. Residents !!	
User :	Jones Jack
Type :	Postal campaign
Title :	New Offer for Reno Residents !! Update
Status :	Opened Modify

Campaign : New Offer for Reno Residents !!	
User :	Jones Jack
Type :	Postal campaign
Title :	New Offer for Reno Residents !! Modify
Status :	Opened Modify

Figure 7.72: Making a copy of a 'sent' campaign.

also uses the Document Editor (13.1).

### 7.9.8.1 Creating an electronic campaign

An electronic campaign is created most easily along those following steps :

- selecting this time 'Electronic campaign' in the 'Type:' menu as shown on Fig.7.67 ;
- associating a contact list like in 7.69 ;
- adding in the **Email Header** zone information specific to this type of campaign, as illustrated in Fig.7.73 ;
- associating a new document or an already-existing one like in 7.9.7.3.

Once all steps above are fulfilled, the **Visualize** button as illustrated on Fig.7.74 allows to create a PDF file that can be saved or printed out as a reminder for that electronic campaign. An 'Attached file:' field allows to attach any document to the electronic campaign (7.9.8.4).

## Weekly Newsletter :

The screenshot shows a web interface for creating an email campaign. At the top, there is a section titled "Contact list" with a link to "L.A. Residents - 8 contact(s) (1 prospect(s), 7 client(s))" and a "Choose" button. Below this is the "Email header" section with fields for "From : <Your email address>", "CC :", "BCC :", and "Subject :". A "Modify" button is located at the bottom of this section, with a red hand icon pointing to it. A blue arrow points from this "Modify" button to a separate window titled "Email header". This window has a title bar with a maximize and close button. It contains four input fields: "From : contact@retailfc.com", "CC :", "BCC :", and "Subject : Weekly Newsletter". At the bottom of this window are "Modify" and "Cancel" buttons, with a white hand icon pointing to the "Modify" button.

Figure 7.73: Creating the header of the electronic campaign 'Weekly Newsletter'.

[After "Weekly Newsletter" has been edited with email information and model document has been associated] :

The first screenshot shows the "Email" section of the interface. It has a header "Email" and a "Model :" field with the value "Electronic Nwsltr.crm". Below this are four buttons: "New model", "Select model", "Visualize", and "Remove document". The "Visualize" button has a red hand icon pointing to it. The "PDF :" field contains "<No PDF>". The "Attached file :" field contains "<None>" and an "Add" button. A blue arrow points from the "Visualize" button to the second screenshot. The second screenshot shows the same "Email" section, but the "PDF :" field now contains "Electronic Nwsltr.pdf - 3/3/2012 10:15". Below this field are two buttons: "Print PDF file" and "Remove PDF file". The "Attached file :" field remains "<None>" with an "Add" button.

Figure 7.74: Creating a PDF file that sums up the electronic campaign.

Example extracts of that PDF file are shown at Fig.7.75.

Print PDF file :

**Email campaign**

**Title :** Weekly Newsletter

**User :** Jack Jones

**Creation date :** 3/3/2012 15:42

**Contact list :** L.A. Residents

**Contact number :** 8 contact(s)  
*1 prospect(s)*  
*7 client(s)*

---

**From :** contact@retailfc.com  
**To :** kim.bauer@mailserv.com  
**Cc :**  
**Bcc :**  
**Subject :** Weekly Food Information Newsletter

Hello Dear suscribers of RFC Newsletter !  
[...]

---

**From :** contact@retailfc.com  
**To :** tyler.durden@mailserv.com  
**Cc :**  
**Bcc :**  
**Subject :** Weekly Food Information Newsletter

Hello Dear suscribers of RFC Newsletter !  
[...]

Figure 7.75: The PDF file generated for an electronic campaign features the campaign's general information as well as the contents of the emails sent to each member of the contact list.

### 7.9.8.2 Sending an electronic campaign


Once **Visualize**'d, an electronic campaign is sent in an identical manner as a postal one, that is to say by clicking on the **Send campaign** button as seen in Fig.7.71. This marks the electronic campaign as 'sent', and in this case, sends the emails to the members of the selected contact list.

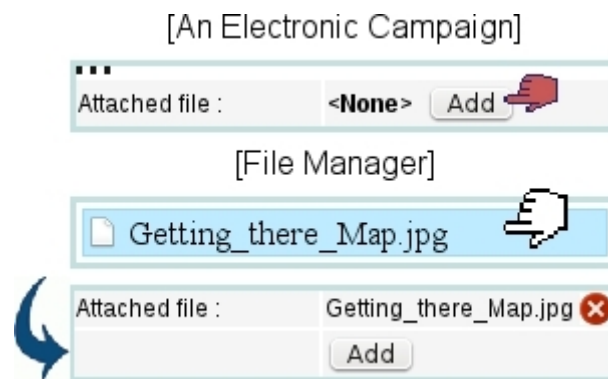
### 7.9.8.3 Duplicating or canceling an electronic campaign

The duplication and cancellation of an electronic campaign are achieved similarly as for postal campaigns ; please refer to respectively 7.9.7.5 and 7.9.7.6.

### 7.9.8.4 Attaching a file to an electronic campaign

Blue Chameleon allows to add an attachment to all the e-mails that will be sent through the electronic campaign. For this to be done, the attachment must be uploaded first to the File Manager (7.4.1.1).

As soon as model document is selected, the 'Attached file:' field becomes available ; then, clicking on **Add** shows the File Manager where aimed document is selected. Its name is finally featured in the aforementioned field, before a  icon that permits to remove it :



Another attachment can then be added in the same way, to a maximum of 5.

## 7.9.9 Postal/electronic letters

In contrast to postal/electronic campaigns, letters are destined to *one particular contact*. The process of creating a new letter, for instance of the postal kind, is shown at Fig.7.76.

Once created, clicking on a letter's attached document name (here, [<No document>](#) for that matter), allows as illustrated on Fig.7.77 to manage this letter. This page displays all the contact's information as well as the same document and status buttons as for campaigns : indeed, the document creation/upload and (in this case) associated PDF generation (7.9.7.3), sending (7.9.7.4), duplicating (7.9.7.5) and cancellation (7.9.7.6) are indeed done in the same exact way as for campaigns.

The sending of an electronic letter similarly follows the same guidelines as an electronic campaign (7.9.8).





Figure 7.76: Creating a new postal letter for prospect Max Burr.

### 7.9.10 Predefined forms

The use of campaigns and letters as described above is fine for documents that have to be sent periodically ; now, the need to generate postal/electronic documents ready to be printed/sent right at the moment might surface.

It is particularly true for documents which have to feature the client's general information, such as repair sheets, quotes, etc...

Blue Chameleon allows to compose such documents, named 'Forms' in an easy way through the document editor ; they will be then generated through the client's own

[<No document>](#) :

Letter : View/Modify	
<b>Letter information</b>	
User :	<b>Jones Jack</b>
Type :	<b>Postal letter</b>
Date :	<b>15/12/2011</b>
Status :	<b>Opened</b> <input type="button" value="Modify"/>
<b>Contact</b>	
Name :	<b>Mr BURR Max</b>
Type :	<b>Prospects</b>
Address :	<b>5 Garden St.</b>
City :	<b>Fargo</b>
Zip code / Country :	<b>58000 / USA</b>
Tel :	<b>5551000</b>
Mobile :	
Fax :	
E-Mail :	
<b>Document</b>	
Model:	<a href="#">Indiv.Prosp. Ltr.crm</a>
	<input type="button" value="New model"/> <input type="button" value="Select model"/> <input type="button" value="Generate PDF file"/> <input type="button" value="Remove document"/>
PDF:	<a href="#">Indiv.Prosp. Ltr.pdf</a> - 15/12/2011 15:15
	<input type="button" value="Remove PDF file"/>

Figure 7.77: This page allows to do any letter-related action in the same way as for campaigns.

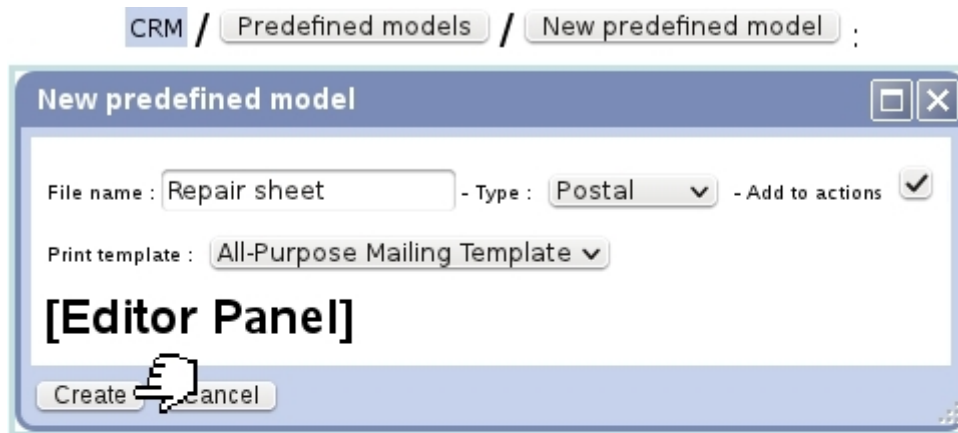
*Management Page.*

### 7.9.10.1 Writing predefined form models

A new form model is created as shown on Fig.7.78. There, similarly as for campaign or letter creation, a Document Editor popup shows (13.3.1), with the following elements to fill :

- a name under which to save this predefined model ;
- whether this model will be used for a print-out (postal) or mail-send (electronic) purpose ;
- whether a CRM action will be automatically created when form is generated or sent ;
- a print template (13.2).

Once created, a form model can be modified or deleted.



[After file has been saved :]



Figure 7.78: Creating a new predefined form model.

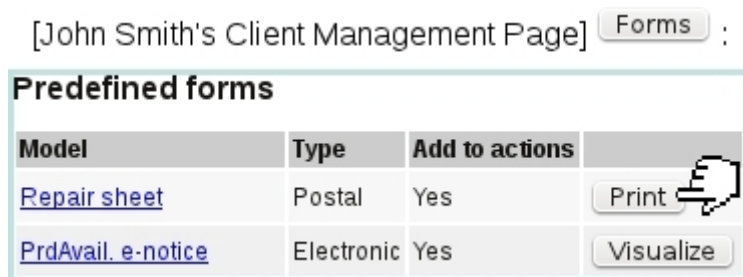


Figure 7.79: Generating a form ready to be printed out for client John Smith.

### 7.9.10.2 Generating a form

On a client's *Management Page* (2.3), as featured as an example in Fig.7.79, the **Forms** button allows then to generate the forms corresponding to the models defined as described above, and also to automatically insert an action if predefined model has been defined to.

'Postal' forms have a **Print** button that, upon click, displays the corresponding PDF, of which an example is displayed at Fig.7.80.

'Electronic' forms, on the other hand hand, have a **Visualize** button leading to a page where email information (such as the sender, subject...) has to be given before sending (Fig.7.81).

[Result on generated PDF] :

**Retail Food, Co**

Retail Food Company  
41, Green Hill Road  
Los Angeles 90000  
Ph : 555 9630  
contact@retailfc.com

## REPAIR SHEET

First name : John  
Last name : Smith  
Address : 12 Orange Road  
City : Los Angeles  
Zip : 90000

Item : \_\_\_\_\_  
Repairman : \_\_\_\_\_

Done on : 21/01/2011 - 9:50  
Signature: \_\_\_\_\_

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Figure 7.80: An example of a form to be printed out.



*These examples make good use of "Client (and other) variables" (13.1.6), allowing to feature client information as well as date, time... without knowing them in advance.*



Figure 7.81: Sending a dedicated email right from the client's page, and also creating an action for the record.

### 7.9.11 Action statistics

As time passes, more and more actions, whatever their type, are added to the system ; to keep a clear, quantitative view of the actions that have been done by type and status (especially how many actions remain to be done) as well as compare the performances of the various users, Blue Chameleon provides a action statistic tool, as accessible from CRM's main page.

As featured on Fig.7.82, a menu allows to select a specific user (or all of them) and a range of dates (corresponding to actions' due dates). Results are twofold : a table for the 'normal' actions (7.9.4) and a table for the 'Information' actions (7.9.5).

For each of those, number of actions according to each type are shown ; and for nor-

mal actions, numbers of actions to do, to be done and done by the system are displayed. Type names as well as the two 'TOTALS' are click-links, which lead to an action search page (7.9.6), for which the User and Action type menus already preset and the action status set to 'To do'.

For instance, clicking on the 'SMS' link would show, for the selected user, all SMS actions remaining to be done.

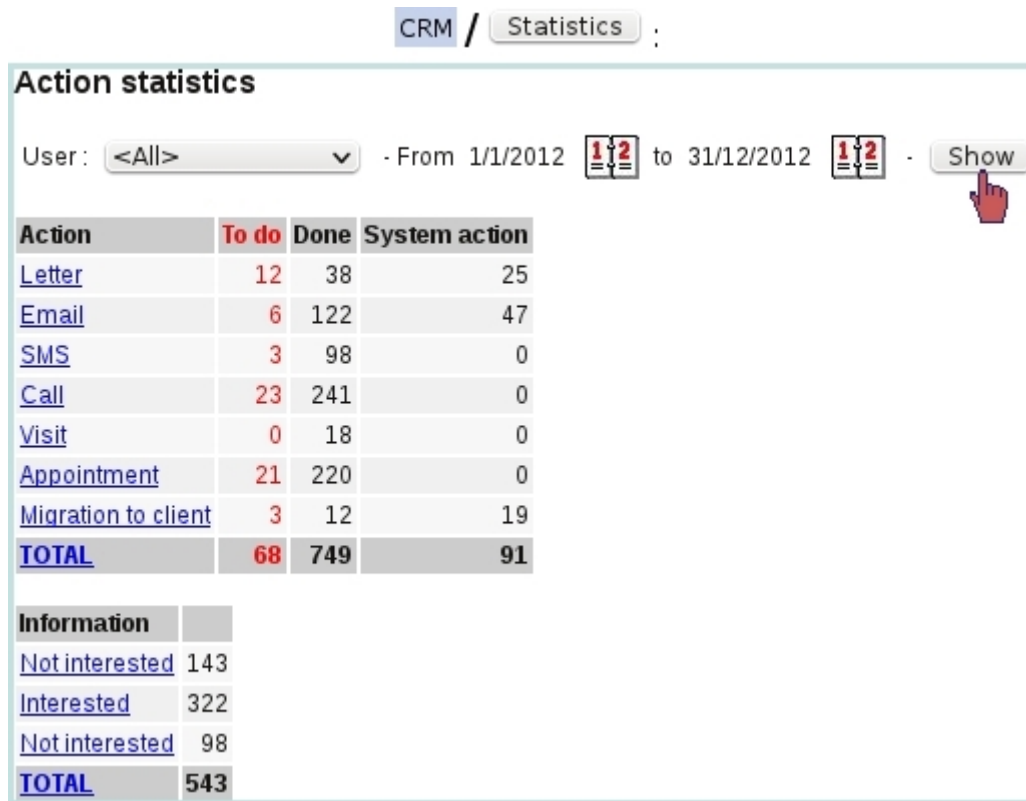


Figure 7.82: A complete, numerical view on actions.

#### 7.9.11.1 Action statistics, on a specific contact list

For more targeted action statistics, as featured on Fig.7.83, a viewed contact list can offer similar action-wise statistics, related on the contacts it contains.

CRM / Contact lists / [Contact List Search] [L.A. residents](#) :

### View contact list

Name : **L.A. Residents**  
User : **Jack Jones**  
Comments : **Clients and prospects living in L.A. or vicinity.**  
Number of contacts : **8 (7 clients, 1 prospect)**

---

## [List of contacts]

---

### Action statistics

From 1/1/2012   to 31/12/2012   -

Action	To do	Done	System action
<a href="#">Letter</a>	3	5	10
<a href="#">Email</a>	2	32	15
<a href="#">SMS</a>	1	31	0
<a href="#">Call</a>	8	71	0
<a href="#">Visit</a>	0	6	0
<a href="#">Appointment</a>	21	73	0
<a href="#">Migration to client</a>	1	4	5
<b>TOTAL</b>	<b>36</b>	<b>222</b>	<b>30</b>

Information	
<a href="#">Not interested</a>	41
<a href="#">Interested</a>	106
<a href="#">Not interested</a>	28
<b>TOTAL</b>	<b>175</b>


Figure 7.83: These are the actions statistics pertaining to all contacts of a contact list.

## 7.10 Projects/Timesheets

Projects aim at representing, for a client, a series of works, tasks, etc. made by your company.

This work can be accounted for and represented at the same time as timesheets, which might even give the possibility to be invoiced.

The Blue Chameleon add-on that allows these acts to be performed, on a daily basis, is accessible via **Add-ons** / **Projects/Timesheets**.



*Project/Timesheet access user 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 :] Projects/Timesheets

### 7.10.1 Rights related to Projects/Timesheets

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.84.



Figure 7.84: The user rights that rule Projects and Timesheets, for a 'manager' user.

For this user :

[Menu script user rights :]

- Projects/Timesheets : rules the access to the Projects/Timesheets add-on

The other rights as displayed further down under [*Projects/Timesheets*] rule the management of :



- Projects (7.10.3), for oneself and for all users (None, View, Create/Modify) ;
- Timesheets (7.10.8), for oneself and for all users (None, View, Modify, Delete/Create/Modify) ;
- whether user will be featured in 'User' menus (as featured on timesheet pages) : this menu must be set to 'Yes' for users who will be featured in timesheets, and 'No' for users who will never have timesheets created in their name. This is useful for making 'User' menus less long ;
- Printing and exporting timesheets (7.10.8.5), for oneself and for all users ;
- Invoicing timesheets : rights can be as low as None, then View, Modify (i.e. choose whether a Timesheet is billable or not (7.10.8.1, 7.10.8.2)), Invoice (create an invoice related to a timesheet, 7.10.9) and Administration, ruling which service articles can be defined for which user (7.10.7). This right, as usual, applies for oneself and for all users.

When Administration is chosen for 'Bill Management', user can also access the *Administration Page* (7.10.7).

## 7.10.2 *Projects/Timesheets main page*

With rights configured as in Fig.7.84, the *Projects/Timesheets main page* shows what is featured at Fig.7.85.

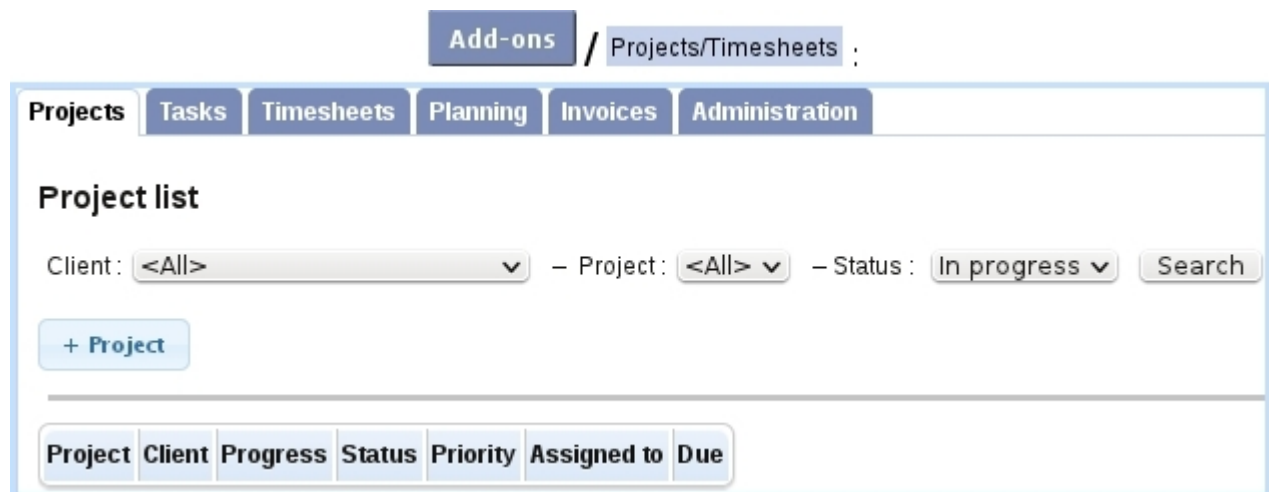


Figure 7.85: The *Projects and Timesheets Main Page*.

Tabs (provided rights are sufficient) on the top can be clicked to access the different parts of the Projects/Timesheets add-on :


- Projects (7.10.3), Tasks (7.10.4) and Planning (7.10.6) tabs, appearing if 'Projects' rights are at least 'View' ;
- Timesheets (7.10.8) tab, appearing if 'Timesheets' rights are at least 'View' ;

- Invoices (7.10.9) tab , appearing if 'Bill management' rights are at least 'View' ;
- Administration (7.10.7) tab , appearing if 'Bill management' rights are 'Administration'.

### 7.10.3 Projects

*Main Projects Page* is accessed via the Project tab ; from here, projects can be searched and created.

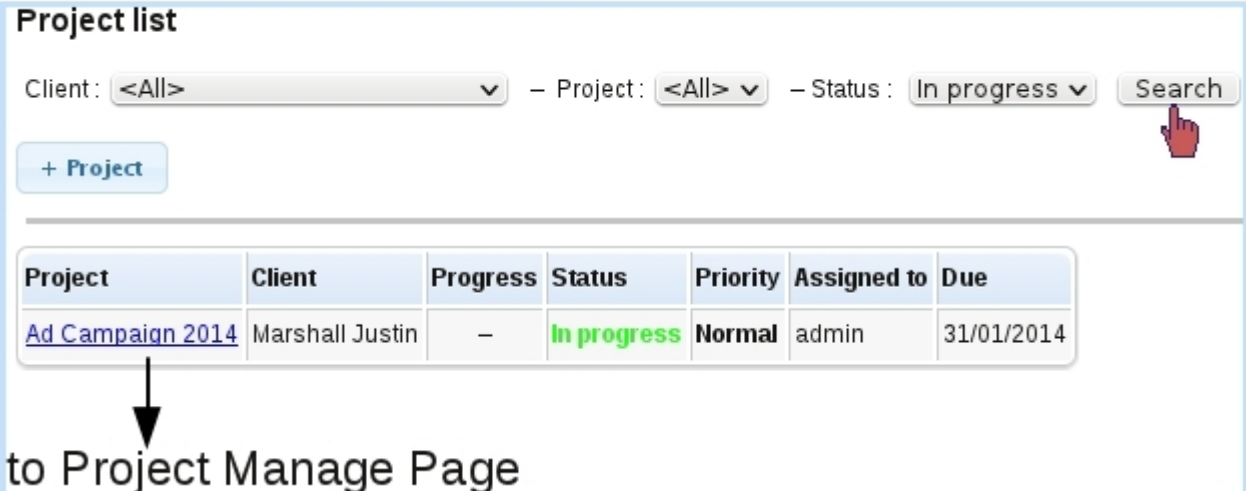
#### 7.10.3.1 Creating a project

Creating a project is done by clicking the  button, where choice is then given between 'Client project' and 'Internal project' (attached to no client). Fig.7.86 shows how a client project is created. There, user can define :

- a label, short label and comments ;
- a starting status ('In progress' or 'Pending') ;
- a priority ('Low', 'Normal', 'High' or 'Critical') ;
- a due date ;
- the enabling of a maximum number of logged hours and amount, when project's related timesheets will be created and invoiced ;
- rights for each user group, 'None' for no access at all to this project ; 'View' only or 'Modify'.

Upon creation, one is redirected to the *Manage Project Page*, that can also be access on the *Main Projects Page* by clicking project's name :

[Projects Tab] :



The screenshot shows a 'Project list' interface. At the top, there are search filters: 'Client: <All>', 'Project: <All>', and 'Status: In progress'. A 'Search' button is located to the right of these filters. Below the filters is a '+ Project' button. The main part of the interface is a table with the following data:

Project	Client	Progress	Status	Priority	Assigned to	Due
<a href="#">Ad Campaign 2014</a>	Marshall Justin	-	In progress	Normal	admin	31/01/2014

An arrow points from the project name 'Ad Campaign 2014' to the text 'to Project Manage Page'.

[Projects Tab] / [+ Project](#) Client project / [Client Search] :

**New project**

For : [istn.mrsh73](#)

Label :

Short label :

Comment :

Status :

Priority :

Due date : 31/01/2014

Enable max amount/number of hours :

Enable preferred services :

---

**Rights :**

Accounting :  None  View  Modify

Administrator :  None  View  Modify

Customer Support Group :  None  View  Modify

External Relations :  None  View  Modify

Sales Department :  None  View  Modify

---

Figure 7.86: Adding a new project for a client.

### 7.10.3.2 Managing a project

Whenever a project click-link is featured, it leads to the *Manage Project Page*, as shown on Fig.7.87.

There, it is possible to :

- modify this project's main data (7.10.3.3) ;
- access its timesheets (7.10.8) ;
- access its invoices (7.10.9) ;

**Ad Campaign 2014 :**

**Ad Campaign 2014 [jstn.mrsh73]** [← Project list](#)

Status : **In progress** – Priority : **Normal** – Planned amount : 0.00 – Planned hours : 0 – Assigned to : admin – Owner : admin – Due : 31/01/2014

[Modify](#)   [Timesheets](#)   [Invoices](#)   [Print overview](#)

---

**Tasks** +

*No task*

---

**Actions** + (  **System actions** )

06/12/2013 09:39 admin	<b>Label :</b> <b>Ad Campaign 2014</b> <b>Status :</b> <b>In progress</b> <b>Priority :</b> <b>Normal</b> <b>Due date :</b> <b>31/01/2014</b> <b>Assigned to :</b> <b>admin</b> <b>Owner :</b> <b>admin</b>
06/12/2013 09:39 admin	<b>Created</b> <b>All designs for 2014 advertisement campaign.</b>

Figure 7.87: This page allows to manage and access all data related to a project.

- print a general overview of the project, in the same layout as a full-featured (all timesheets, all users) PDF print (7.10.8.5), with further invoice-related information ;
- view and add tasks to the project (7.10.4) ;
- view and add actions to the project (7.10.3.4).

### 7.10.3.3 Modifying a project

As featured on Fig.7.88 the following properties of a project can be updated :

- label, short label, status and priority ;
- amount and hours planned, provided project had been created with the enabling thereof (7.10.3.1) ;
- owning user and user it is assigned to (so as to appear on user's Event Control, 7.10.5) ;
- rights, in a similar manner as for creation ;
- project's allowed services (7.10.3.5).

Any validated update is then logged as an system 'action'. User actions can be created anytime, as described next.

[Manage Project Page] Modify :

Label: <input type="text" value="Ad Campaign 2014"/>	<span style="border: 1px solid #ccc; padding: 2px 5px;">Rights ↓</span> <span style="border: 1px solid #ccc; padding: 2px 5px;">Services ↓</span>
Short I.: <input type="text" value="AdCpgn14"/>	
Status: <span style="border: 1px solid #ccc; padding: 2px 5px;">In progress ▼</span> Priority: <span style="border: 1px solid #ccc; padding: 2px 5px;">Normal ▼</span>	
Amount planned: <input type="text" value="20000"/> Hours planned: <input type="text" value="38"/>	
Due: <input type="text" value="31/01/2014"/> <span style="border: 1px solid #ccc; padding: 2px 5px;">1 2</span>	
Assign to: <span style="border: 1px solid #ccc; padding: 2px 5px;">admin ▼</span> Owner: <span style="border: 1px solid #ccc; padding: 2px 5px;">admin ▼</span>	
<span style="border: 1px solid #ccc; padding: 2px 10px; margin-right: 10px;">Validate</span> <span style="border: 1px solid #ccc; padding: 2px 10px;">Cancel</span>	

Figure 7.88: Updating a project.

### 7.10.3.4 Project actions

Whenever something new is done on the project, or just for information purposes, one can add a project action as shown at Fig.7.89.

[Manage Project Page] :

...

Actions + (  System actions )

**Add action:** +

Prelim docs have been sent.

+ Add file...

Add
Cancel

Figure 7.89: Adding an action for a project.

Also, to each action, it is possible to add a file, accessible at any point of the project's history.

### 7.10.3.5 Allowed services for a project

The Services ↓ button as found on the Modify Project interface (Fig.7.88) serves as to define which services (which are in fact shop articles that are counted in a hourly way)

are proposed adding a timesheet for that project.

Fig.7.90 shows how articles can be added.

The screenshot shows a web interface for managing project services. At the top, there is a header "[Manage Project Page] Modify". Below this, there is a section for selecting services. It starts with a dropdown menu set to "<All users' services>" and a "Change" button. Below that, there are two rows of service selection options. The first row shows "Category: Marketing", "Service - Billing: Polling (phonecalls) Payable", and a green plus icon. The second row shows a table with columns "Service" and "Billing", containing "Polling (phonecalls)" and "Payable" with a "Default" button and a red 'x' icon. Below the table, there is another "Category: Marketing" dropdown and "Service - Billing: <Choose> Optional (payable)" with a green plus icon. Red hand icons indicate where to click to change services or add new ones.

Figure 7.90: Adding a service article to be used for this project's timesheet.

As shown there, when no services are defined, user's own defined services (7.10.7) will be proposed. By clicking the **Change** button, shop articles used as 'services' can be added. Here, the article 'Polling (phonecalls)' (which price has been defined for an hour) will be proposed when adding a service timesheet (7.10.8.2), its billing forced to 'Yes' ; there, this service can be automatically selected by making it **Default**

The different billing options are :

- Free, meaning that service timesheets cannot be declared as billable ;
- Optional (free), meaning that service timesheets can be declared as billable or non-billable, with the latter chosen by default ;
- Optional (payable), meaning that service timesheets can be declared as billable or non-billable, with the former chosen by default ;
- Payable : meaning that service timesheets are no other way than billable.



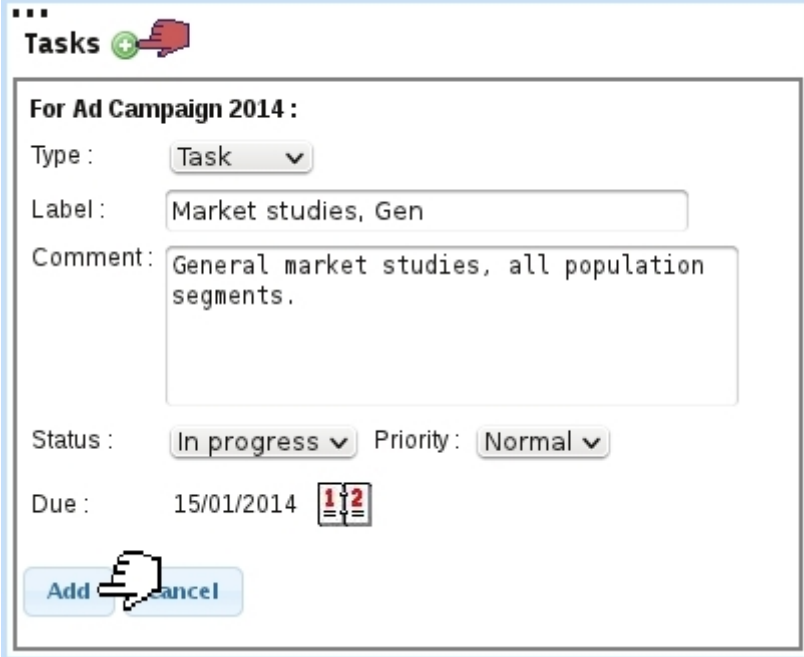
*The existence of such allowed services for a project override any service defined for a user (7.10.7). If a project has one or several defined services, only those will be proposed when adding a service timesheet.*



## 7.10.4 Project's tasks

A task for a project can be created from the *Manage Project Page*, or from the *Manage Tasks Page* (7.10.4.1).

Fig.7.91 shows how a task is added from a project.

[Manage Project Page] :



**Tasks**  

**For Ad Campaign 2014 :**

Type :

Label :

Comment :

Status :  Priority :


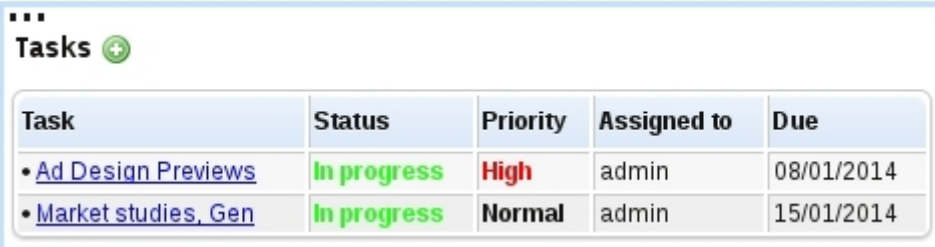
Due : 15/01/2014 

Figure 7.91: Adding a task for a project.

Tasks, on the Project's page, are featured in a table, each being a click-link to its *Manage Task Page* (7.10.4.1) :

[Manage Project Page] :



Task	Status	Priority	Assigned to	Due
<a href="#">• Ad Design Previews</a>	In progress	High	admin	08/01/2014
<a href="#">• Market studies, Gen</a>	In progress	Normal	admin	15/01/2014

### 7.10.4.1 Managing tasks

Clicking on the name of a task, wherever it appears, activates the Tasks tab to show the task's information, which can be updated (7.92).

**Market Studies, Gen :**

**Market studies, Gen** Ad Campaign 2014 ← Task list

Status : **In progress** – Priority : **Normal** – Assigned to : admin – Owner : admin – Due : 15/01/2014

---

**Modify**

Label :

Status :  Priority :

Due : 15/01/2014

Assign to :  Owner :

---

**Actions**  (  System actions)

07/01/2014 17:10 **First draft of results.**  
 admin  
 File : [results](#)

Figure 7.92: From here, a task can be managed.

Similarly as for a project, actions are logged and can be added, optionally with an attached file.

On this page, right to the task name, a click-link allows to show the task's related project, shown in the then-activated Projects tabs.

The  button allows to show the *Task List Page* as explained next.

#### 7.10.4.2 List of tasks

Accessed from an individual task or from the Tasks tabs when accessing the Projects/Timesheets add-on, the *Task List Page* (7.93) allows to look for tasks according to the following search criteria :

- user who owns tasks or to whom tasks have been assigned ;
- a range of dates for the due date ;
- a particular status.

#### 7.10.5 Project event control

In order to remind user of the tasks that are due, s/he can activate the "Projects/Timesheets" event control (1.3), which can show the following :



[Manage Task Page] [← Task list](#) :

or [Add-ons](#) / [Projects/Timesheets](#) / [Tasks](#) :

**Task list**

User :   – From 01/01/2014  to <none>

Status :  – Sort by :  –

Task	Project	Status	Priority	Assigned to	Due
<a href="#">Ad Design Previews</a>	<a href="#">Ad Campaign 2014</a>	In progress	High	admin	08/01/2014
<a href="#">Market studies, Gen</a>	<a href="#">Ad Campaign 2014</a>	In progress	Normal	admin	15/01/2014

Figure 7.93: An interface to look for tasks.

[Home](#) :

Projects ...
- □ ↗ ✕

Tasks in progress	Project	Due
<a href="#">Ad Design Previews</a>	<a href="#">Ad Campaign 2014</a>	08/01/2014
<a href="#">Market studies, Gen</a>	<a href="#">Ad Campaign 2014</a>	15/01/2014

## 7.10.6 Project planning

As accessed via the [Planning](#) tab, in order to better allocate users' time, Projects and users to process them can be planned in advance in a weekly view as featured in Fig.7.94. There, for each project and day of the selected week, the view shows which users are to work on which project.

In order to define a day's schedule for a project, one must click on the corresponding cell and add users (on that menu are only shown users having access to Projects/Timesheets and having been configured as 'will be featured in User menus', 7.10.1) :

**Planning**

View: **Project** **User** - Projects **Active** - Week: 06/01/2014 - 12/01/2014 **Display**

Project	Mon 6/1	Tue 7/1	Wed 8/1	Thu 9/1	Fri 10/1	Sat 11/1	Sun 12/1
<a href="#">Ad Campaign 2014</a>		Dick Harry Tom					

Figure 7.94: An example of project planning.

There, users are added with and removed with . Also, before validating, it is possible to duplicate the cell's planning for the next few days to come.

Afterward, a cell's planning can be modified in a similar way.

The 'View : Project/User' toggle on top of the page serves as to switch from this view to a view where *users* are listed vertically and, in each planning cell, *projects* (that are pending or in progress) will be featured ; the adding and deleting of projects for a day is done in the same way.

On the 'User:' menu there, it is to note that teams (7.10.7.1), if they have been defined, are also proposed.

### 7.10.7 Projects/Timesheets administration

Provided user's 'Bill management' rights (7.10.1) are set to 'Administration', the eponymous tab appears and shows what is featured at Fig.7.95.

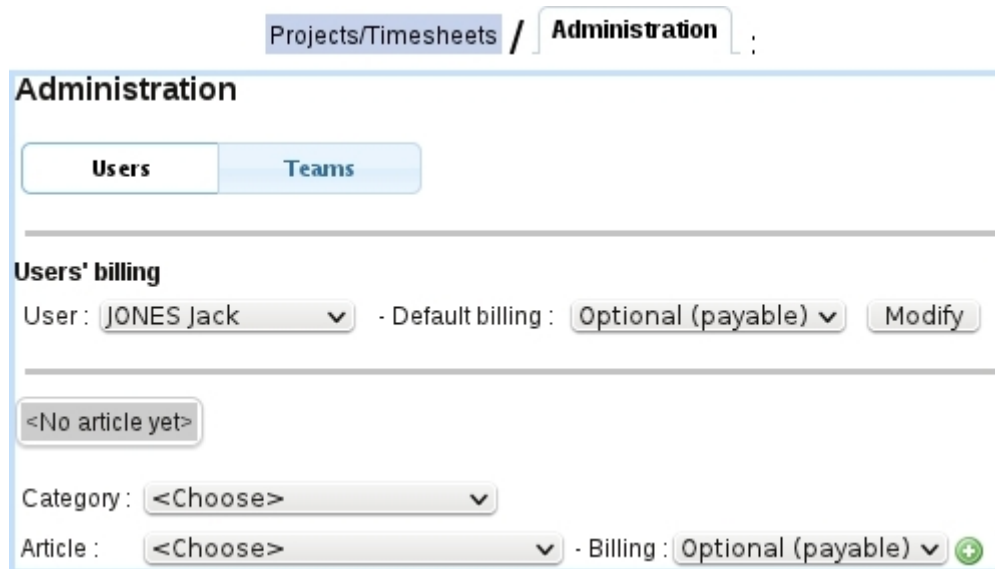


Figure 7.95: From here, users' billing preferences and services can be managed.

The first part defines the default billing when adding an service article is added in the interface just under it. This interface works similarly as in 7.10.3.5.

For instance, setting user Jack Jones has having the service article 'Airbrushing and enhancing' (as default) will mean that, **for projects without any service defined**, this service will be proposed when bringing up the add service interface.

#### 7.10.7.1 Teams of users

The 'User:' menus as seen on the timesheets or project planning (7.10.6) environment may also propose teams ; those are groups of users and are defined in the Human Resource Management add-on (7.11.4.9).


### 7.10.8 Managing Timesheets

Timesheets have the following properties :

- they can be either of the 'Service' or 'Article' kind ; in the former, for the project, a user performs a certain service for a certain timelength ; in the latter, an article from the shop is used for the project's needs (and thus does not have any user attached to it) ;

- therefore, in addition to the client, the project and (optionally) the user, a timesheet has either a duration or a quantity ;
- a comment is added too, describing what has been done.

Before properly using timesheets, a few configuration steps have to be performed, by defining allowed services for the projects (7.10.3.5) and/or users' services (7.10.7). **'Service' articles are created in the Shop as any other article**, except that the unit price must correspond to an hourly price.

The *Timesheet Page*, featured at Fig.7.96 is accessed either by the eponymous tab or by clicking the  button on the *Manage Project Page* (7.10.3.2). By default the *Timesheet Page* shows a 'Monthly View'.

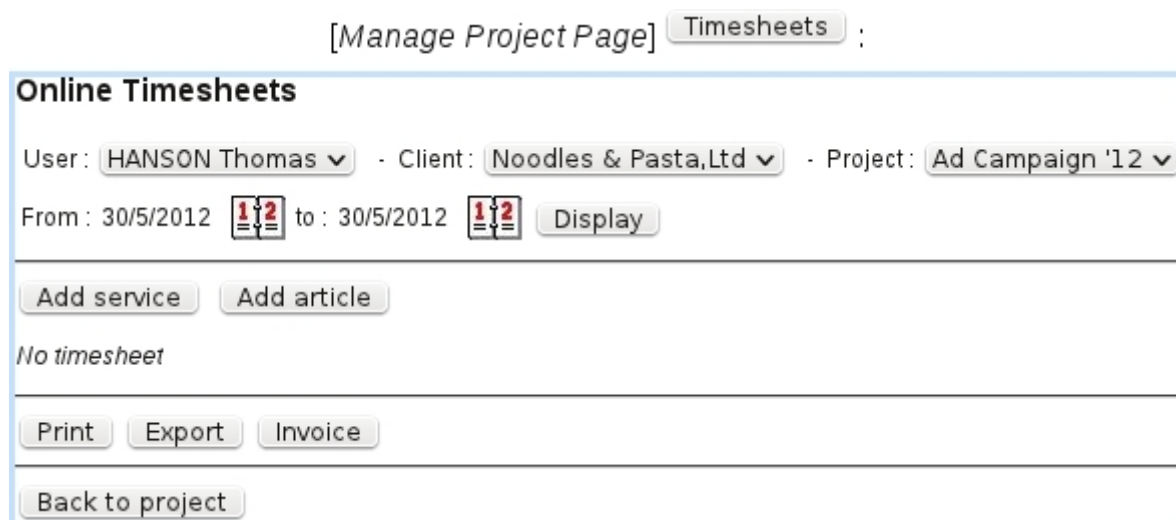


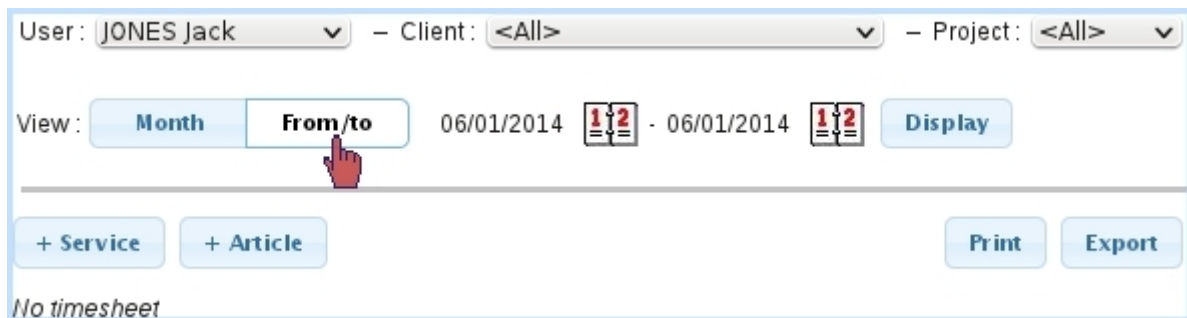
Figure 7.96: The *Timesheet Page*.

It features :

- a user menu, provided that user has at least 'View' rights for All's timesheets (7.10.1), otherwise it is just the name of the current user ; this user menu may also feature teams (7.10.7.1) ;
- client and project menus, that may be set to the originating project if coming from *Manage Project Page* ;
- a toggle between 'Month' and 'From/to' view ; the latter is where timesheets can be created (7.10.8.1) ;
- below those, according to the view choice a monthly or extended list of timesheets is shown, with buttons allowing to browse and others to print and export (7.10.8.5).

### 7.10.8.1 Creating timesheets

Adding timesheets is done by switching to the 'From/to' view, which then shows what the following :



The screenshot shows a user interface for creating timesheets. At the top, there are three dropdown menus: 'User: JONES Jack', 'Client: <All>', and 'Project: <All>'. Below these, there are two buttons: 'Month' and 'From/to', with a red hand cursor pointing to 'From/to'. To the right of these buttons are two date pickers, both set to '06/01/2014', and a 'Display' button. Below the date pickers, there are two buttons: '+ Service' and '+ Article'. At the bottom right, there are 'Print' and 'Export' buttons. The text 'No timesheet' is displayed at the bottom left.

Two buttons **+ Service** and **+ Article** allow to create such timesheets, as described next. For these buttons to appear, user must have sufficient Timesheet rights.

Right to those, buttons allow to **Print** and **Export** timesheets (7.10.8.5).

### 7.10.8.2 Creating a service timesheet

Fig.7.97 shows how a 'service' timesheet is added.

[Timesheet Page, From/To View] **+ Service** :



The screenshot shows a dialog box titled '[Timesheet Page, From/To View] + Service :'. It contains the following fields and options:



- Client: Marshall Justin (dropdown)
- Project: Ad Campaign 2014 (dropdown)
- Date: 06/01/2014 (calendar icon) repeat:  7/1/2014 -  8/1/2014 -  9/1/2014 -  10/1/2014
- User: JONES Jack
- Service: Polling (phonecalls) (dropdown)
- Billable: Yes
- Duration: 6h30 (dropdown)
- Comment: Poll was made on the 18-35 age range. (text area)
- Buttons: Add (with hand cursor) and Cancel

Figure 7.97: Creating a service timesheet.


There :



- client, project and user are preselected from above ;


- date, as set by default to the current date, can be modified by clicking on the calendar icon. Timesheet can also be repeated the few next days ;
- service : if allowed services had been defined for the project (7.10.3.5), those are the ones that are shown in this menu. If project has no defined allowed service, user's services (7.10.7) are shown ;
- the 'Billable:' field contains either 'Yes' or 'No' or a menu with those, according to the billing of the service article chosen above ;
- finally a duration in hours (with half-hour increments) is picked and a comment is filled.

Upon click on , the service timesheet is created, and another one can be done right after ; the panel is dismissed with . Service timesheets feature in the following order the client, the date, the user (with the service article), the project and comment, and the duration :

Client	Date	User	Project	Duration
Marshall Justin	06/01/2014	admin <i>Polling (phonecalls)</i>	<b>Ad Campaign 2014:</b> Poll was made on the 18-35 age range.	6h30
<b>Total 06/01/2014</b>				<b>6h30</b>

When switching back to the Monthly View, a summary for Service timesheets is provided on each day line ; further details can be then viewed by putting mouse cursor over the  icon :

View:   :

January 2014		Duration	Clients
01	Wed	0h00	
02	Thu	0h00	
03	Fri	0h00	
04	Sat	0h00	
05	Sun	0h00	
	06	Mon	6h30 <b>Marshall Justin [Ad Campaign 2014]</b>

**Marshall Justin** Ad Campaign 2014

Jack Jones [Polling (phonecalls)] *Poll was made on the 18-35 age range.* (6:30)

Clicking on a day line in the Monthly View brings up the Range View with boundaries set to that day.



*It is to note that if neither project (7.10.3.5) nor user (7.10.7) were configured service-wise, a service timesheet can still be added, the service article being 'None' and the 'Billable:' property set to 'No'.*

**7.10.8.2.1 Creating a service timesheet for a team** By selecting a team (7.10.7.1) in the 'User:' menu, the 'User' field in the create service timesheet panel changes to a list featuring herself/himself and her/his teammates with checkboxes, pre-ticked according to whether user is selected by default in that team :

The screenshot shows a software interface for creating a service timesheet. At the top, a 'User/Team' dropdown menu is open, showing 'Writers' as the selected team. Below the dropdown, a list of users is displayed under the heading 'Users'. The users listed are HANSON Thomas, JONES Jack, MALONE Richard, and ROBBS Harry. Each user has a checkbox next to their name, and all three listed users have their checkboxes checked. Below the user list, there is a '+ Service' button. Below the dropdown menu, a blue arrow points to the main form area. The main form contains the following fields: 'Client: Marshall Justin', 'Project: Ad Campaign 2014', 'Date: 07/01/2014' with a calendar icon and a 'repeat:' section with radio buttons for dates 8/1/2014, 9/1/2014, 10/1/2014, and 13/1/2014. The 'Users:' section shows three checked checkboxes for HANSON Thomas, MALONE Richard, and ROBBS Harry.



*If project has no defined service : the available service article menu is ruled by the leader of the team and will be applied to each member of the team : the chosen article must then have been configured (7.10.7) before to each of them.*

Validating the timesheet will then automatically create an individual timesheet for each of the checked team members.

### 7.10.8.3 Creating an article timesheet

Contrary to the 'service' timesheets as described before, the article timesheets are not attached to a particular user. They describe which articles of the Shop have been used to do a certain task. Therefore, there is no duration anymore, only a quantity.

Fig.7.98 features the creation of such a timesheet. Final result shows client, date, article, project, comment and quantity.

[Timesheet Page, From/To View] + Article :

Client:

Project:

Date:

Category:

Article:  quantity:

Billable:

Comment:

• Sheet 6ft by 4ft, glossy (15)

Figure 7.98: Creating an article timesheet.

Such timesheets, belonging to no user in particular, are always displayed on the Range View provided the date range, client and project are right. They are on the other hand not displayed on the Monthly View, as this view rather focuses on worked durations.

#### 7.10.8.4 Modifying timesheets

If user has sufficient Timesheet rights either for herself/himself or All, **and if the timesheet has not been invoiced yet**, service and article timesheets can have the following data changed, by clicking directly on the element :

- for both types : client, project, date and comment ;
- for service timesheets : user, service article, duration and (if applicable) billability ;
- for article timesheets : article, quantity and billability.

Validating changes is done through . To cancel any change,  must be clicked. If the rights are sufficient, timesheet can be deleted through .

#### 7.10.8.5 Printing and exporting timesheets

The  ,  buttons as available on the *Timesheet Page* (provided user has sufficient rights for 'Print/Export') respectively allow to produce PDF and CSV printouts of timesheets. Clicking on any of those leads to a page with various options.

For the 'Print' page, as featured at Fig.7.100, it is possible to :



Client	Date	Article	Project	Quantity
Marshall Justin	10/01/2014	Sheet 6ft by 4ft, glossy	Ad Campaign 2014 For pre-prints.	15
<b>Total 10/01/2014</b>				<b>15</b>

Figure 7.99: Modifying an article timesheet.

- display timesheets to print by a particular client (or for all), and narrow display by a particular project pertaining to her/him ; by default, client and projects are inherited from the menus on top of the page ;
- choose the format, whether each page will display one client or one project ;
- show the sub-totals by client or project : indeed, on the printout, the duration/quantity for each timesheet element is displayed and then these durations/quantities are summed up. Sub-totals by client and project are relevant when 'All' had been chosen for the 'Client:' and 'Project:' menus on the top of the page ;
- show timesheets issued by oneself, or by any or 'All' user(s) (in the latter cases, provided that user all sufficient "Print management" rights for 'All') ; a box can be ticked so as to to show user name(s) next to each timesheet element. Teams can also be selected ; in which case, timesheets corresponding to users belonging to that team will be shown ;
- the start and end dates in between which timesheets will be displayed. Their default values depend on the current view, whether from 1 to the end of month for Monthly View or the chosen range for Range View ;
- show according to the billing status and the billability ;
- the writing paper on which timesheets will appear, created similarly as described in 13.2.

Here is an example of timesheet printout :

[Timesheet Page] [Print](#) :

Client :	Marshall Justin	▼
Project :	Ad Campaign 2014	▼
Format :	1 client per page	▼
Subtotals :	by client	▼
User/Team :	Writers	▼
Display user :	<input checked="" type="checkbox"/>	
Display details :	<input checked="" type="checkbox"/>	
Display amounts :	<input checked="" type="checkbox"/>	
From :	01/01/2014	
To :	15/01/2014	
Billable :	<All>	▼
Billed :	<All>	▼
Writing paper :	All-Purpose Mailing Template	▼
<a href="#">Print PDF</a> <a href="#">Close</a>		

Figure 7.100: Printing options.

<b>Marshall Justin</b>				
01/01/2014 - 15/01/2014				
Date	Ad Campaign 2014	User/Service	Duration	Price (VAT incl.)
06/01/2014	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	6h30	650.00
07/01/2014	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	7h15	725.00
<b>Total</b>	<b>Marshall Justin</b>		<b>13h45</b>	<b>1,375.00</b>

Date	Ad Campaign 2014	Article	Quantity	Price (VAT incl.)
10/01/2014	For pre-prints.	Sheet 6ft by 4ft, glossy	15	450.00
<b>Total</b>	<b>Marshall Justin</b>		<b>15</b>	<b>450.00</b>

The interface for the 'Export' is similar, except there are no format, billable and billed menus ; the output is a CSV file with the following fields featured, for service timesheets :

"Date";"User/Service";"Client";"Project";"Duration";"Comment";  
"Billable";"Billed";"Price"

and for article timesheets :

"Date";"Article";"Client";"Project";"Quantity";"Comment";"Billable";"Billed";"Price"

### 7.10.9 Invoicing timesheets


[Manage Project Page] **Invoices** :


#### Invoice timesheets

Client : Marshall Justin ▾

Project : Ad Campaign 2014 ▾


User : <All> ▾

From : 06/01/2014 

To : 10/01/2014 

Show pre-invoiced/invoiced :

Show non-billable :

Show 

<input type="checkbox"/>	Ad Campaign 2014	User/Article	Date	Quantity
<input checked="" type="checkbox"/>	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	06/01/2014	6:30:00
<input checked="" type="checkbox"/>	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	07/01/2014	7:15:00
<input checked="" type="checkbox"/>	For pre-prints.	Sheet 6ft by 4ft, glossy	10/01/2014	15


Invoice selected 

Figure 7.101: The *Invoice Timesheet Page* : choosing the timesheets to invoice.

The great strength of Blue Chameleon is that it allows timesheets that are billable to be invoiced directly, without going through the shop.

The page to invoice timesheets can be accessed either by the **Invoices** tab or by the **Invoices** button as found on the *Manage Project Page* (7.10.3.2). The latter will more practically pre-load the menus and calendars (client, project, user and range of date) as

seen on Fig.7.101. A checkbox also allows to show the timesheets that had been invoiced and an other one to show those which cannot be billed (which can be useful to retrieve a non-billable timesheet that had been labeled so by mistake).

Timesheets (of whichever type, article or service - for the latter, depending on the chosen user) corresponding to the search criteria are shown, with their general data (project, user/article, date, quantity/duration) and for each a checkbox that allows to select it for pre-invoicing.

### 7.10.9.1 Pre-invoicing

Clicking on the **Invoice selected** button as seen on the *Invoice Timesheet Page* leads to a page as featured on 7.102, where :

- quantities/durations can be adjusted, if needed (any change in those will be affect the corresponding timesheets) ;
- if article's ordering options (3.3.1.3) allow to, label, unit price or both can be modified.

**Invoice selected** :

**Invoice timesheets [Ad Campaign 2014]**

<b>Value date :</b> 15/01/2014	<b>Username:</b> <a href="#">jstn.mrsh73</a>
<b>Posting date :</b> 15/01/2014	<b>Title:</b> Mr
	<b>Name:</b> Marshall Justin
	<b>Address:</b> Prism Avenue 59100 Billings USA
	<b>Status:</b> Ok

Label:

Article	Quantity	Price	Total price	VAT
Polling (phonecalls)	6h30 ▾	100.00	650.00	5.00 %
Polling (phonecalls)	7h15 ▾	100.00	725.00	5.00 %
Sheet 6ft by 4ft, glossy	15	30.00	450.00	5.00 %
<b>Total VAT incl.</b>			<b>1,825.00</b>	
<b>Total VAT excl.</b>			<b>1,738.10</b>	
<b>Total VAT</b>			<b>86.90</b>	

Figure 7.102: From here, quantities/durations and labels may be updated.

Any change has to be **Update**'d. Clicking on **Pre-invoice** leads to the *Pre-invoice Page*, (Fig.7.103) where :

- all timesheets featuring the same article or service **are summed in a single line, with the quantities/durations summed up** : here, the two lines with the service article 'Polling (phonecalls)', one timed at 6:30 hours and the other at 7:15 hours are merged into a single 'Polling (phonecalls)' line timed at 13:45 hours ;
- also, if article's ordering options (3.3.1.3) allow to, label, unit price and summed-up can quantities/durations be modified ;
- new lines can be **Add**'ed ;
- pre-invoice can be saved as a draft (necessary before creating the invoice itself).

The pre-invoice can be accessed later on : the *Invoice Timesheet Page* will feature, for each pre-invoiced timesheet, a click-link (e.g. [Pre-invoice #205](#) that allows to access directly the pre-invoice page.

Pre-invoice / Save as draft :

### Pre-invoice #205 [Ad Campaign 2014]

<b>Value date :</b> 15/01/2014	<b>Username:</b> <a href="#">jstn.mrsh73</a>
<b>Posting date :</b> 15/01/2014	<b>Title:</b> Mr
	<b>Name:</b> Marshall Justi
	<b>Address:</b> Prism Avenue 59100 Billings USA
	<b>Status:</b> Ok

Label:

Article	Quantity	Price	Total price	VAT	
Polling (phonecalls)	13 hours 45 minutes	100.00	1,375.00	5.00 %	
Sheet 6ft by 4ft, glossy	15	30.00	450.00	5.00 %	
<b>Total VAT incl.</b>			<b>1,825.00</b>		
<b>Total VAT excl.</b>			<b>1,738.09</b>		
<b>Total VAT</b>			<b>86.91</b>		

---

Figure 7.103: The pre-invoice, just after it saved as a draft.

### 7.10.9.2 Finally creating the invoice

Once all changes have been done to the pre-invoice (and they can be done and saved all along the project's life), the invoice can finally be created by clicking [Generate invoice](#).

As a result, the *Invoice Timesheet Page* is shown back, with now for each invoiced timesheet a reference to the created invoice. It should be noted that, for 'service' articles, the quantity (which can only be an integer) is given as minutes, the (unit) 'Price' being the hourly rate :

Ad Campaign 2014	User/Article	Date	Quantity	Invoice
Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	06/01/2014	6:30:00	<a href="#">201401150100000191</a> <a href="#">Details</a>
Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	07/01/2014	7:15:00	<a href="#">201401150100000191</a> <a href="#">Details</a>
For pre-prints.	Sheet 6ft by 4ft, glossy	10/01/2014	15	<a href="#">201401150100000191</a> <a href="#">Details</a>

### 7.10.9.3 Details on invoiced timesheets

When several timesheets are selected for invoicing, a few of them may correspond to the same article, for instance a 'service' article performed at several dates. In order to make the final invoice as succinct as possible, **those identical articles are condensed in a single line : their quantities or duration as well as their total prices are be summed up**, provided there was no change in label or unit price.

It is still then possible to get the full details of a series of invoiced timesheets, through the [Details](#) button as found right to the invoice reference.

On subsequent page, full details about the invoiced timesheets are shown, but most interestingly, it is possible to [Print](#) those details, giving a result rather similar to the timesheet PDF printout (7.10.8.5).

This way, if a series of timesheets had the same articles repeated a few times (for instance the same service performed at different dates or by different users), **this printout, giving the full details of what has been done, completes nicely the invoice printout, which is condensed.**

[201401150100000191](#) [Details](#) :

### Invoice details

Reference : [201401150100000191](#)

Client : Marshall Justin

Date : 15/01/2014

Date	Ad Campaign 2014		Duration/Qty	Price (VAT incl.)
06/01/2014	Poll was made on the 18-35 age range.	Jack Jones [Polling (phonecalls)]	6:30:00	650.00
07/01/2014	Poll, phase 2 (36-70).	Jack Jones [Polling (phonecalls)]	7:15:00	725.00
10/01/2014	For pre-prints.	Sheet 6ft by 4ft, glossy	15	450.00
<b>TOTAL (VAT incl.)</b>				<b>1,825.00</b>

Display user  Display details

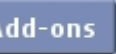
[Print PDF](#)

Figure 7.104: Full details of a series of invoiced timesheet, which can be printed out.

## 7.11 Human Resource Manager (HRM)

Blue Chameleon's Agenda, as previously seen (7.2), offered a client-dedicated organization of your company's working force. Now, employees also have their own timetable-related plans, rights and duties that should be taken care of ; that is why Blue Chameleon's is equipped with a Human Resource Manager that allows to :

- manage employees along their working schedule (regular weeks, on weekends...) and work contract (permanent, temporary...) ;
- as an employee, plan holidays, modify them... in a quantitative way ;
- manage employees' requested holidays in a chain-of-command manner ;
- see at a glance, through the Planning, what each user or user groups are up to, sick leave, work or holidays.

The HRM functionalities are accessed via the eponymous submenu element in the  command group.

### 7.11.1 HRM setup guide

This guideline has to be followed before using HRM and, after that, each time a new user is in.

1. set up HRM user rights (7.11.2) ;
2. define workweek profiles (7.11.4.1) ;
3. configure employees (7.11.4.3) : to each user, assess a workweek profile as well as entry/outgo dates so that her/his Planning is filled by default.

### 7.11.2 Rights related to the Human Resource Manager

They are ruled at the *Modify User Page* (9.17) for instance as illustrated on Fig.7.105.

For this user :

[*Menu script user rights* :]

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

The other rights as displayed under [*HR Management*] rule the management (reading, creating, modifying and deleting) of HRM's components. They might be for 'Owner' (the right is limited to user herself/himself), 'Group' (the right is extended to all users in user's default user group) 'All' (user can apply it to any other user) :



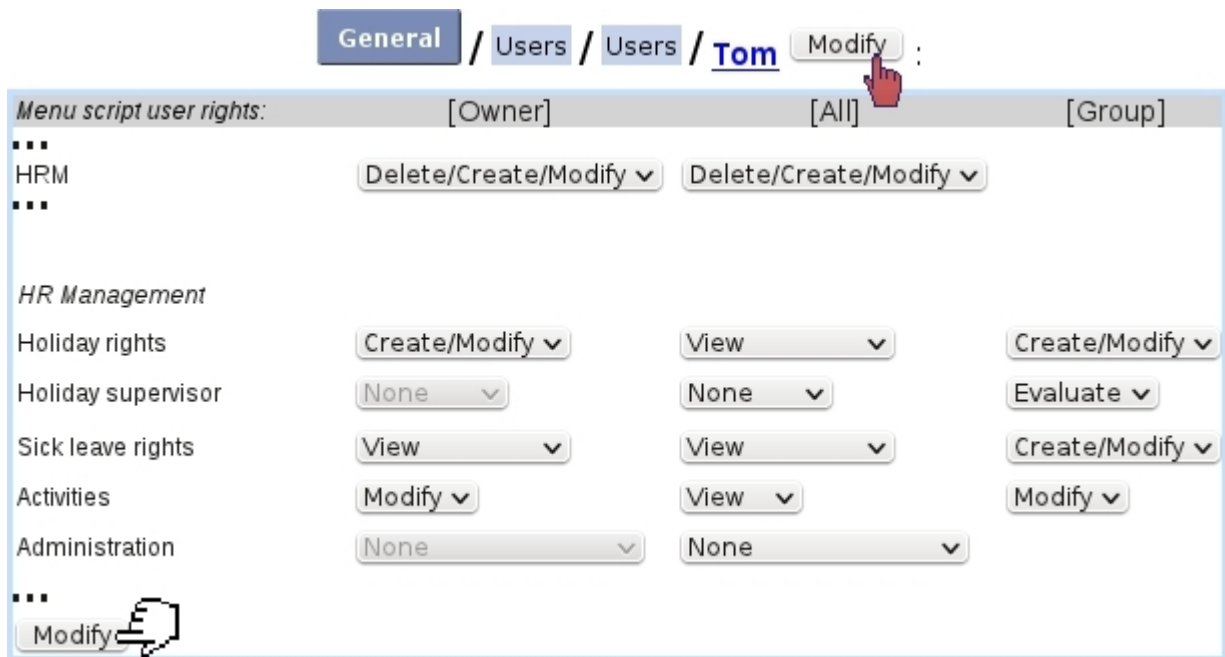



Figure 7.105: The user rights that rule Human Resource Manager ; **these values are ideal for a non-manager user that is a head of group** (he can indeed plan holidays, sick leaves and activities for users belonging to his group).

- Holiday rights ('Owner', 'Group', 'All') : are related to user's ability to her/his own (and others') holiday. Values are :
  - None : no access to holiday planning ;
  - View : the holiday planning can only be viewed ;
  - Create/Modify : user can add (7.11.5.2) and modify (7.11.5.4) holidays for herself/himself (in addition, her/his group or all users) and also cancel requests (7.11.5.4.2) for unconfirmed holidays ;
  - Credit/Debit : user can credit and debit holidays (7.11.5.9) ;
  - Review : user can review holidays requests (7.11.5.7). With this particular right, user can also modify and cancel holidays that have already been confirmed.
- Holiday supervisor ('Group', 'All') : gives user the right to give an opinion on a holiday request (7.11.5.8) ;
- Sick leave rights ('Owner', 'Group', 'All') : are related to user's ability to sick leaves (7.11.9). Values are :
  - None : user cannot see her/his own or others' sick leaves ;
  - View : user's own sick leaves or others' can be seen on the planning ;
  - Create/Modify : user can add and modify sick leaves for herself/himself ('Owner') and others ('Group', 'All').

- Activities ('Owner', 'Group', 'All') : user can modify activities, on the planning (7.11.10) for herself/himself or other users ; this also grants the right to overtime management (7.11.6) and on-planning week/day type change (7.11.7).
- Planning administration ('All') :
  - None : the 'Administration' button, at the bottom of the *Main Planning Page*, does not even show ;
  - Workweek profiles : user can define and delete (7.11.4.1) ;
  - Yearly management : user can default-fill planning for any year (7.11.4.5).


### 7.11.3 Planning view

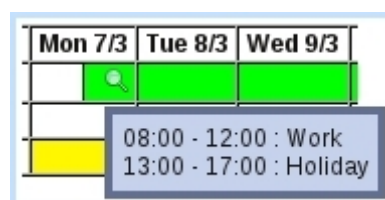
As featured on Fig.7.106, the planning is accessed via **HRM**. The following display options are featured :

- search menus to aim on a particular user group and/or user, as well as ('User status') according to their Blue Chameleon access (9.4.3) status : enabled, disabled or any of those ;
- browsing calendars , allowing to then **Display** the planning from and to any date ;
- a checkbox enabling to show holidays that have not been validated yet.

Upon display, thanks to click-links, the planning can also be browsed in a weekly or monthly way. User names are also clickable, showing user's information (7.11.3.1).

On the planning grid, a cell which is fully colored means that this event lasts for the user's whole day (therefore, with a duration equal to user's *Daily Work Duration*, as weekly set on the *Staff Workdays Page*, 7.11.4.4), otherwise the number of hours that the event lasts is shown in a proportional way to the cell's width.

Hovering mouse cursor over a cell shows a  icon, which mouseover shows in a small window the detailed planning contents of the day :



Color codes for cells (or cell parts), as well as the effect of clicking on them, are as follows :

**Planning**

User group :  User :  User status :

From 7/3/2011  to 13/3/2011  -  Show pending holidays

---

**Planning group Sales Department, 7 March 2011 - 13 March 2011 :**

<< February <	User	Mon 7/3	Tue 8/3	Wed 9/3	Thu 10/3	Fri 11/3	Sat 12/3	Sun 13/3	> April >>
	HANSON Thomas ...								
	MALONE Richard ...				Biz trip	Biz trip			
	ROBBS Harry ...								

Print model :

Figure 7.106: The *Main Planning Page*, showing the planning of all users (with an *enabled* access) in "Sales Department" user group.


Color	Meaning	Click (*)
white	work	Manage Day pop-up (7.11.3.2)
red	no work	<i>Add/Modify Workday Page</i> (7.11.6)
green	confirmed holidays	<i>View Holidays Page</i> (7.11.5.3), ( <i>Modify Holidays Page</i> (7.11.5.4) if 'Review' rights)
orange	pending holidays	<i>Modify Holidays Page</i> (7.11.5.4)
yellow	sick leave	<i>Modify Planning Page</i> (7.11.9.1)

(\*) *provided that related user rights are sufficient.*

As it can be seen on the illustration, a white planning cell may contain a small text, corresponding to an activity (7.11.10) set for that user that day.

Below the planning grid, as many as four buttons may be available, according to user's rights (7.11.2) :

- , leading to the eponymous page as detailed at 7.11.5.1 ;
- , leading to the *View Activities Page* (7.11.10) ;
- , allowing to access the *Manage Users' Holidays Page* (7.11.5.6) ; this button only appears if "Holiday rights" are at least set to 'Debit/Credit' ;
- , allowing to access the *Planning Administration Page* (7.11.4) ; this button only appears if "Administration rights" are at least set to 'Workweek profiles'.

At the very bottom of *Main Planning Page*, a button is available to  as a formatted PDF document the current view of the planning (limited to one week), according to a print model (13.2).



*It is to note that, in order to not clutter the display, only users who had been assessed a workweek profile (7.11.4.4) appear here.*

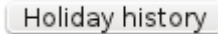
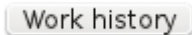
### 7.11.3.1 The User Information pop-up

[Main Planning Page] [HANSON Thomas](#) :



Figure 7.107: The User Information pop-up.

On the *Main Planning Page*, clicking on a user's name shows the pop-up as featured in Fig.7.107, where the following is available :

- the user's general information (names, user groups, phone numbers,...) as it was filled on the *Modify User Page* (9.17) ;
- a button allowing to view user's  (7.11.5.5) ;
- a button allowing to view user's  (7.11.8) ;
- same possibility as above for user's sick leave (7.11.9) history.

The clickable "..." right next to a user name leads to a page where a detailed planning (similar as the one featured at Fig.7.125) for this user can be seen.

### 7.11.3.2 The Manage Day pop-up

On the Planning view, whenever a cell (or part thereof) is white, clicking on it brings (if at least one of the two elements proposed in the menu is allowed by rights) the Manage Day pop-up as featured on Fig.7.11.3.2. According to the user's rights (7.11.2), and depending how current user is related to the clicked cell's user, these elements may or may not appear :

- the clicked day's activities (7.11.10) can be changed ; for this to appear, user has to be configured activity-wise (7.11.4.4) and the user right for 'Activity' has to be high enough for 'Owner', 'Group' or 'All', depending on the clicked user ; it is to note that as many activity choices appear as user's day is configured work-wise (for instance, work from 8-12, nothing from 12 to 1PM and work again from 1PM to 5PM : yields two activity choices) ;
- the daily planning/weekly planning corresponding related to this day can be changed (7.11.4.2/7.11.7) ; this also relies on the 'Activities' user right ;
- an event can be added :
  - new holidays (7.11.5.2), relying on the eponymous user right ;
  - overtime or undertime (7.11.6), relying on the 'Activities' user right ;
  - sick leave (7.11.9), relying on the eponymous user right.



Figure 7.108: The Manage Day pop-up for user Tom.

The **More...** buttons as seen in this pop-up allow to configure more precisely or broadly :

- for Activity, it brings the pop-up as seen in Fig.7.139, where the activities for the week (or the month) can be set ;
- for Daily planning, it brings up similar detailed schedule menus as in Fig.7.134 allowing to define a more complicated schedule ;
- for Weekly planning, it leads the same page as in Fig.7.115, where weekly profiles can be set for the whole year.

For holidays or sick leaves, on the subsequent page, a range of dates for the new event will be proposed, starting and ending by default on the clicked date. For overtime, a configuration page the day is brought up.

### 7.11.4 Planning Administration

Configuring the planning user-wise is done from the *Planning Administration Page* as illustrated on Fig.7.109, accessible only if "Administration" user rights (7.11.2) are sufficient, i.e. at least set to 'Workweek profiles'.

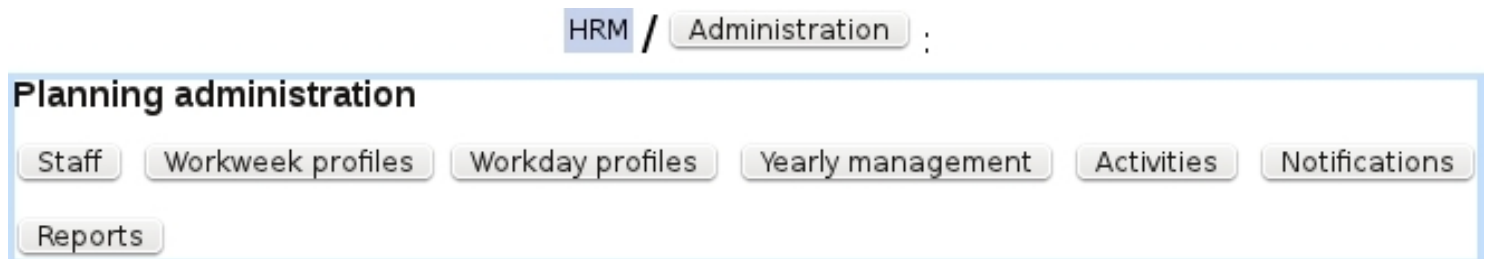


Figure 7.109: The *Planning Administration Page*.

On this page :

- **Staff** leads to the *Manage Staff Page* (7.11.4.3), where employees are configured (entry/exit dates, workweek profiles) ;
- **Workweek profiles** leads to the page as described next where workweek profiles are created ;
- **Yearly management** leads to the page where the yearly filling of planning (7.11.4.5) is taken care of ;
- **Activities** leads to the page where activities are configured (7.11.4.6) ;
- **Notifications** leads to the page where notifications are set up (7.11.4.7) ;
- **Reports** leads to a page where time-wise reports upon employees' sick leaves, holidays... can be printed out (7.11.4.8).

**When first using HRM, defining workweek profiles and configuring employees as described next must be done in order.**

### 7.11.4.1 Defining workweek profiles

Inside a company, employees might not share the same weekly schedule and total worked hours ; that is why Blue Chameleon enables to define workweek profiles, describing for each day of the week which hours are worked and which are not.

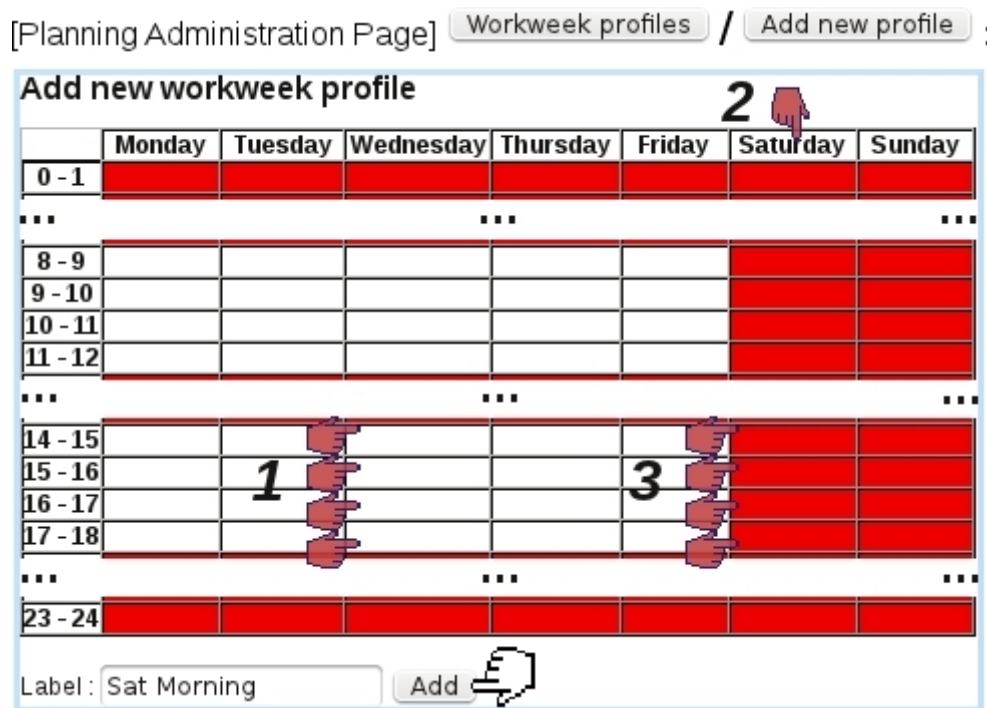


Figure 7.110: Creating a workweek profile with a Wednesday afternoon off and a worked Saturday morning. First, the four hours of Wednesday afternoon are clicked to be declared as un-worked ; then, **Saturday** is clicked to be declared as worked and finally the four hours of Saturday afternoon (now in white) are clicked to be declared as un-worked.

Defining such profiles is achieved from the *Planning Administration Page*, via the [Workweek profiles](#) / [Add new profile](#) . A general weekly schedule, as featured on Fig.7.110 is then displayed.

There :

- clicking on a particular cell declares this hour either worked or un-worked ;
- clicking on a day's name makes it either fully un-worked or worked similarly as the other days ;
- clicking on a hourly range (for instance **8-9**) declares it either worked or un-worked for all worked days of the week.

The default workweek profile is defined from Monday to Friday, from 8 to 12 and from 14 to 18.

**View workweek profile**

Label : Sat Morning

	Monday	Tuesday	Wednesday	Thursday	Friday	Saturday	Sunday
0 - 1							
...							
8 - 9							
9 - 10							
10 - 11							
11 - 12							
...							
14 - 15							
15 - 16							
16 - 17							
17 - 18							
...							
23 - 24							

Figure 7.111: Viewing the workweek profile as previously created.

Any profile can then be seen (as illustrated as a result on Fig.7.111) via [Workweek profiles](#), as well as modified (in a similar way as defined) and removed.

#### 7.11.4.2 Defining workday profiles

Workday profiles can be designed to be used whenever a specific day's planning has to be modified ; they then appear in a specific menu (as seen for instance at Fig.7.134 or at the Manage Day Popup, 7.11.3.2) and allow thus to load in a single click a day's profile.

They are defined from the *Planning Administration Page*, through [Add new day profile](#) ; on subsequent popup, as featured at Fig.7.112, hourly ranges are defined by clicking on the 🕒 icons for start and end and are [Add](#)'ed. The day profile is then created.

Afterwards, workday profiles can be modified and deleted (provided that they are not already used in the planning).

#### 7.11.4.3 The *Manage Staff Page*

As illustrated in Fig.7.113, this page features, for users (as usual searchable by user groups, access status (9.4.3) and user type (9.17)) :

- her/his **current** workweek profile (7.11.4.1), as assessed as described at 7.11.4.4.1 ;
- her/his allowed holiday overdraft i.e. the number of vacation days that can be taken eventhough user has none remaining (provided of course they will be compensated for in the future) ;



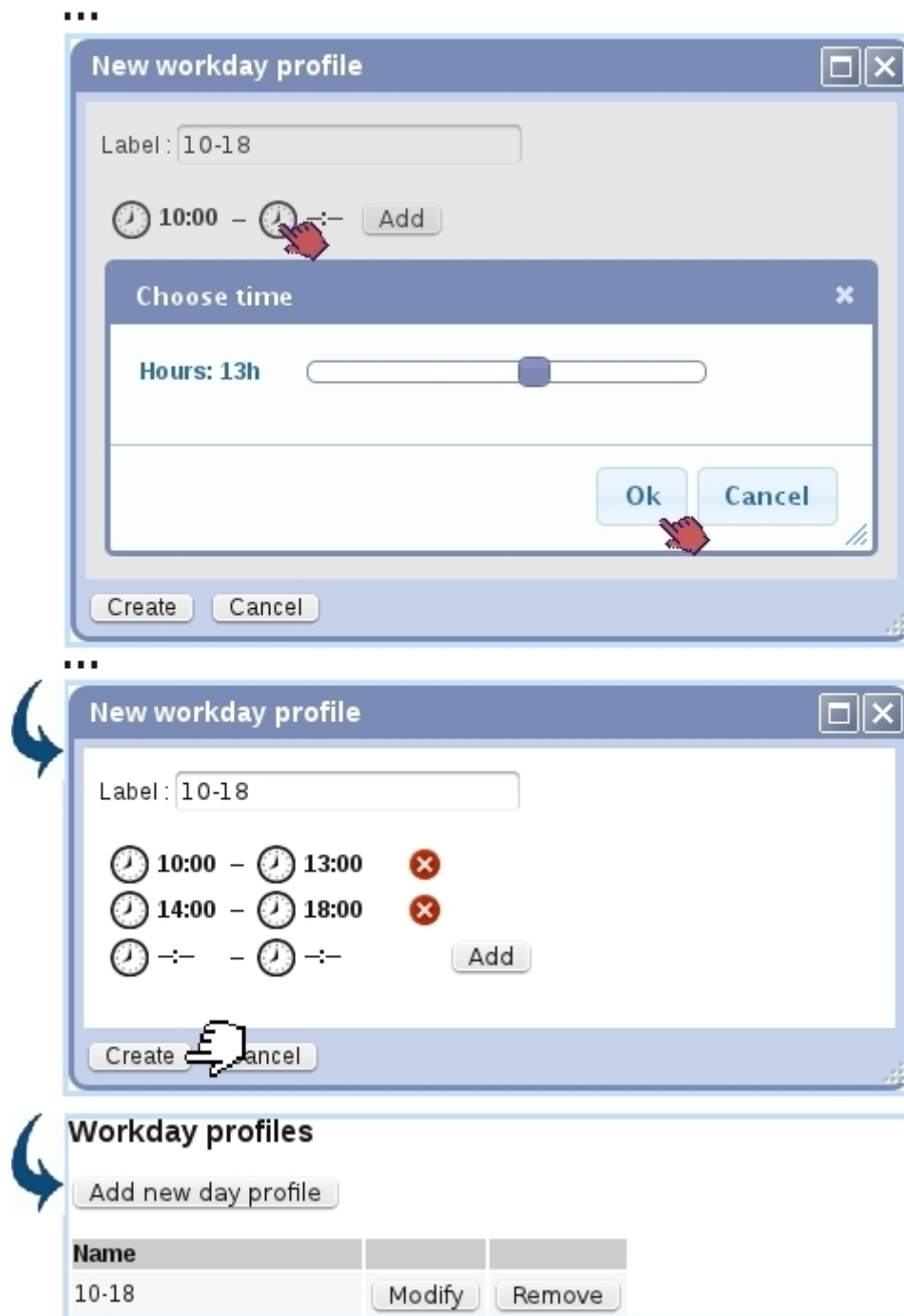


Figure 7.112: Creating a workday profile, defining a day worked from 10AM to 1PM and 2PM to 6PM.

- their entry and exit dates in the company ; users can be filtered entry and exit date-wise thanks to four calendars at the page ;
- buttons allowing to **View** and **Modify** this particular user.

**Staff**


User group :  User :  User status :  User type :

Entry : from  to  - exit : from  to

User	Current workweek profile	Default workweek profile	Holiday overdraft	Entry	Exit	
HANSON Thomas	Regular	<None>	2	02/01/2004	-	<input type="button" value="View"/> <input type="button" value="Modify"/>
MALONE Richard	Regular	<None>	2	04/12/2005	-	<input type="button" value="View"/> <input type="button" value="Modify"/>
ROBBS Harry	Sat Morning	<None>	2	02/10/2006	31/12/2012	<input type="button" value="View"/> <input type="button" value="Modify"/>

Figure 7.113: The *Manage Staff Page*, offering extensive data on Blue Chameleon users relating to the Planning.

The latter button leads to a page where workweek profile, holiday overdraft and entry/exit dates are to be configured. It is explained next.

 *It is to note that, contrary to the Main Planning Page (Fig.7.106), users with no assessed workweek profile are shown here, as the Manage Staff Page's main aim is to configure users in that regard.*

#### 7.11.4.4 Configuring an employee

Fig.7.114 shows the data that can be individually configured for each employee. Apart from a menu allowing to set an allowed holiday overdraft in days, a button allows to configure the  of assessed workweek profiles on a dedicated page, detailed further down.

Those configuring operations have to be done before using HRM.

Two calendars allow to define entry and exit dates of user in the company :

[Manage Staff Page] HANSON Thomas (...)  :

### Modify employee profile

User : **Thomas HANSON**[Sales Department]

Current workweek profile : Regular


Default workweek profile : Regular

Hol. overdraft (days) : 2

Entry date : 2/1/2004

Exit date : <none>

Category : Salesmen



---

Figure 7.114: The *Manage Employee Page* : human-resource data of a user inside Blue Chameleon.

2/1/2004  

2/1/2004 

Jan 2004

Su	Mo	Tu	We	Th	Fr	Sa
				1	2	3
4	5	6	7	8	9	10
11	12	13	14	15	16	17
18	19	20	21	22	23	24
25	26	27	28	29	30	31

If employee is a permanent one, then setting exit date to 'None' (or any date for that matter) is done by clicking on the  button in this calendar. This no-date option is also in force on the search calendars of the *Manage Staff Page*. If a date was selected by mistake in the calendar, it can be re-initialized to its former value by clicking the  button.

If nothing is configured for the user yet, it is to note that, when validating changes via **Modify**, the default planning for this user is filled according to the **default workweek profile** (which must be defined in any case) and entry/exit dates. If for instance no entry date is defined, planning is filled beginning at the start of the current year ; if no exit date is defined, planning is filled until the end of the current year.

For more complex plannings, the **Details** of user's set workweek profiles can be configured, as explained next.

Lastly, the 'Category :' field shows the activity categories (7.11.4.6.1) that have been defined and allows to assess one to this employee.

**7.11.4.4.1 Configuring workweek profiles** As Fig.7.115 shows, on the upper part of the page, a workweek profile is chosen in a menu, along with a date from which it starts : validating this with the **Apply** button will fill/reformat the planning for this user with that workweek profile from this date on (always automatically set to be a Monday).

[Manage Staff Page] HANSON Thomas (...) **Modify** / **Details** :

**Weekly schedule details**

User : **Thomas HANSON**[Sales Department]

Current workweek profile : **Regular**

Apply :  starting :

---

Year :

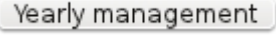
Week	Workweek profile
02/01/2012 - 08/01/2012	<input type="text" value="Regular"/>
09/01/2012 - 15/01/2012	<input type="text" value="Regular"/>
...	...
24/12/2012 - 30/12/2012	<input type="text" value="Regular"/>
31/12/2012 - 06/01/2013	<input type="text" value="Regular"/>

Figure 7.115: Two ways by which to configure the weekly schedules of an employee.

For users that may have a more complicated schedules, i.e. weekly schedules subjected to change along time, the lower part of the interface allows, *for each week of the current year*, to choose one specific workweek profile ; any change done that way is validated

through the  button at the bottom of the page.

#### 7.11.4.5 Yearly management

When the end of the year comes - or even anytime in the year, it is necessary to fill in plannings by default for the next year : this is done as shown on Fig.7.116 via the  as found on the *Planning Administration Page*.

This page (endowed with the usual user-related search menus) indicates for each user until which date the planning is filled, and also warns if a user has no workweek type assessed to her/him, in which case user has to be configured as shown at 7.11.4.4.

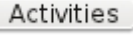


*The process of filling plannings for the next year, covering all employees, may take some time for the server to complete.*



*It is to remember that, before filling the plannings by default, the workweek profiles for the next year can be modified thanks to the interface as seen in Fig.7.115 ; otherwise, filling is done according to the workweek profile in force at the last week of the current year.*

#### 7.11.4.6 Configuring activities

Before starting using activities (7.11.10) in the planning, it is of course necessary to define them first, a task which is done through the  button as seen on the *Planning Administration Page* (Fig.7.109).

To make their assessment to users easier, activities are gathered in **categories**.

**7.11.4.6.1 Activity categories** Fig.7.117 shows how an activity category is defined, consisting only in a name.

Afterwards, an activity category is assessed to an employee on her/his *Manage Employee Page* (Fig.7.114).

Categories can be modified name-wise or removed (if they do not contain any activity) with the eponymous buttons.

**7.11.4.6.2 Defining activities** With activity categories defined as shown above, activities themselves are defined as featured at Fig.7.118.

[Planning Administration Page] Yearly management :

**Yearly management**

User group : <All> User : <All>  
User status : Enabled User type : merchant company Search

User	Planning filled until
HANSON Thomas	31/12/2012
JONES Jack	31/12/2012
KOVÁCS Jane	31/12/2012
LAVEREAU Dwayne	06/06/2012
MALONE Richard	31/12/2012
ROBBS Harry	31/12/2012
RUSSELL Mary	31/12/2012
SAWYER James	31/12/2012
WINSTON Karen	31/12/2012
ZMUDA Robert	No workweek type ! Planning not filled !

Fill planning for 2013 :

User	Planning filled until
HANSON Thomas	31/12/2013
JONES Jack	31/12/2013
KOVÁCS Jane	31/12/2013
LAVEREAU Dwayne	06/06/2012
MALONE Richard	31/12/2013
ROBBS Harry	31/12/2012
RUSSELL Mary	31/12/2013
SAWYER James	31/12/2013
WINSTON Karen	31/12/2013
ZMUDA Robert	No workweek type ! Planning not filled !

Figure 7.116: Filling the plannings by default for year 2013 ; it is to note that the fill does not affect temporary employees (whose exit date is within the current year) and unconfigured employees (respectively Dwayne Lavereau and Robert Zmuda in this example).

The short label is featured whenever display is under size constraints, e.g. when there are two activities in the same day or when activity is not the only thing in the planning cell.

After their definition, activities' names can be modified or their categories changed ; they can be removed provided that they have not been yet used in the planning.

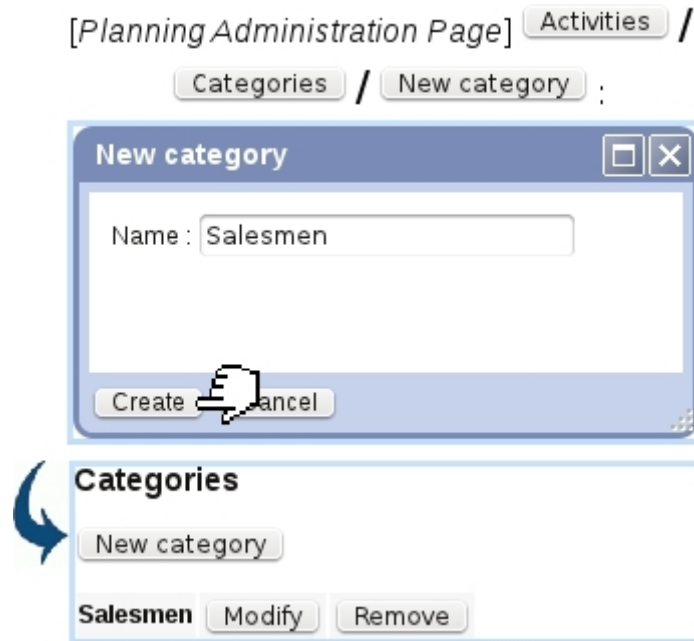


Figure 7.117: Defining a new activity category 'Salesmen'.

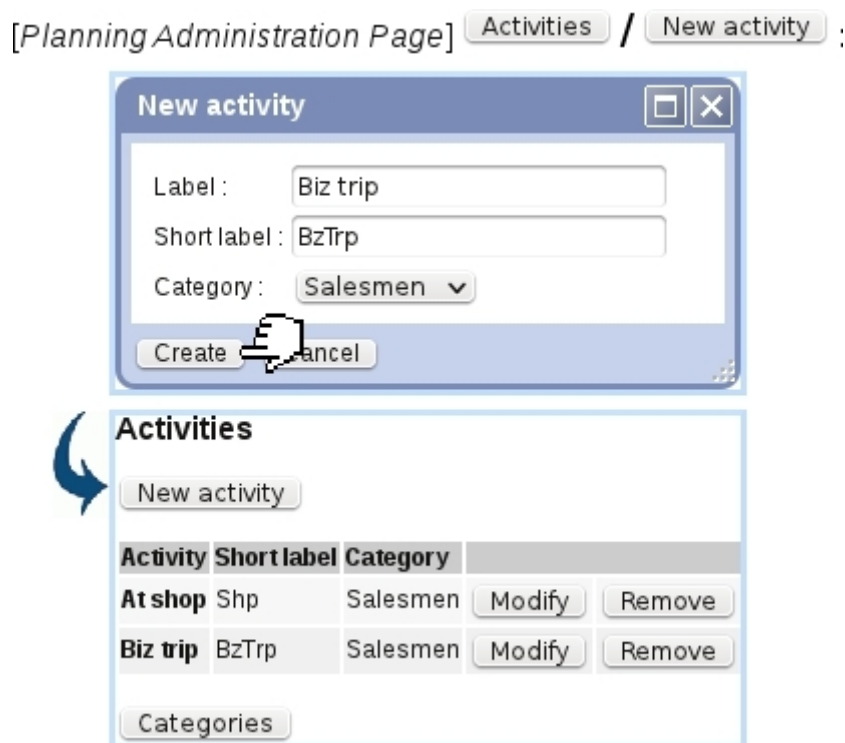


Figure 7.118: Defining an activity 'Biz trip', related to category Salesmen.

#### 7.11.4.7 Holiday notifications

Whenever a user creates a new holiday request (7.11.5.2), another user (for instance the leader of her/his group) can receive an email notification of it, and, if rights are sufficient, can give an opinion on this request (7.11.5.8) before it is reviewed.

Those notifications are sent automatically to whomever has been set as the recipient(s).

As described on Fig.7.119, through the **Notifications** as found on the *Planning Administration Page* (7.11.4), a list of users is found, with for each which user(s) will be notified of the request and confirmation, as also an email can be sent when holiday is confirmed or refused.

On this configuration page, one or several users can be set as receiving the holiday request notifications and/or confirmations.

[Planning Administration Page] **Notifications** :

**Notifications**

User group : <All> User : <All>

User	Notifications to	Confirmations to	
...	...	...	...
MALONE Richard	-	-	<input type="button" value="Modify"/>

**Holiday notifications for MALONE Richard**

Notifications to : HANSON Thomas ✖

<Choose>

Confirmations to : <None>

<Choose>

<Choose>

HANSON Thomas

User	Notifications to	Confirmations to	
...	...	...	...
MALONE Richard	HANSON Thomas	HANSON Thomas	<input type="button" value="Modify"/>

Figure 7.119: User Thomas is set as the receiver of Richard's holiday request notifications and confirmations.

#### 7.11.4.8 HRM reports

As illustrated below, this functionality allows managers to display, for a custom range of dates, the number of days/hours for each kind of occupation (normal work, overtime, holidays, sick leaves) ; a specific user group can be chosen.



Thanks to the eponymous button, a PDF version of the search results can be printed out along a print model.

[Planning Administration Page] **Reports** :

**Reports**

User group:  User:

User status:  User type:

From 1/6/2012  to 30/6/2012  Display:

---

**Normal hours (Days | Hours)**

Period: 01/06/2012 - 30/06/2012

User	June	Total
HANSON Thomas	21 0	21 0
MALONE Richard	21 0	21 0
ROBBS Harry	25 5	25 5



Print model:

Figure 7.120: Days and hours as worked by the Sales Department for June 2012.

#### 7.11.4.9 User teams

Teams aim at grouping users which perform tasks together ; they may used to define what is done on a planning cell, similarly as for activities (7.11.10).

As shown on Fig.7.121, a team is defined with the following data :

- a name and short name ;
- optionally, an activity category (7.11.4.6.1) to restrict team to only users belonging to that category ;
- whether this team is visible in Activities/Teams menus ;
- whether this team is accessible (i.e. can be assessed) to users that do not belong to it ;
- a menu with users (that may only show a subset of users if the 'Category:' menu further up has been set to other than 'None'), each of them added by  and removed by . They may be 'selected by default' and one user is defined as leader ; those concepts are relevant in the Projects/Timesheets add-on when adding a Timesheet for a team (7.10.8.2.1).

[Planning Administration Page] Teams / Add team :

**New team**

Name : Report Writers

Short name : Writers

Category : <None>

Visible :

Accessibility : Open

Teammates :

User	Selected by default	Leader	
<None>			
HANSON Thomas	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Create Cancel

**Teams**

Add team

User	Selected by default	Leader	
HANSON Thomas	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
MALONE Richard	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
ROBBS Harry	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>
<Choose>	<input checked="" type="checkbox"/>	<input type="radio"/>	<input checked="" type="checkbox"/>

Create Cancel

Figure 7.121: Defining a team 'Report Writers'.

After, teams' data (members, leaders, visibility...) can be viewed at a glance ; they can also be modified or deleted (provided they are not used in the planning yet) :

[Planning Administration Page] Teams :

**Teams**

Add team

Name	Short name	Function	Users	Visible	Accessibility	
Report Writers	Writers	<None>	Dick, Harry, Tom	Yes	Open	 

## 7.11.5 Holiday use

How to exhaustively manage employees' vacations is elucidated in the following.

### 7.11.5.1 The *My Holidays Page*

As accessed via the eponymous button as found on the *Main Planning Page*, this page as illustrated on Fig.7.122 offers the **current user** a general view upon her/his holidays, featuring :

- a search tool by holiday status (all, pending, confirmed, refused and canceled) ;
- a search tool by year, including the current, previous and next ones.

[Main Planning Page]  :

**My holidays**  
Jack JONES[Administrator]

Status :  Year :

Start	End	Duration	Status		
22/06/2011	28/06/2011	4 days	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>
17/01/2011	20/01/2011	2 days - 4 hours	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>
10/01/2011	10/01/2011	1 day	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>
27/12/2010	06/01/2011	8 days - 4 hours	Confirmed	<a href="#">View</a>	<a href="#">Modify</a>

Figure 7.122: User Jack Jones views his confirmed 2011 holidays.

Search results are shown in a table giving holiday's start and end dates, duration, and status ; also, two click-links allow to view (7.11.5.3) and modify (7.11.5.4) in detail this holiday, while, at the bottom of the page, a button allows to plan  (7.11.5.2).

### 7.11.5.2 Planning holidays

Holidays, for a given user, can be planned according to the value of "Holiday rights" (7.11.2) :

- by herself/himself if they, for 'Owner', are at least set to 'Create/Modify' ;
- by others if they, for 'All', are at least set to 'Create/Modify'.

Planning new holidays will create a holiday request that will be reviewed by the person in charge of it (7.11.5.7).

Holidays can be planned in two possible ways, either of them leading to a screen as featured in Fig.7.123 and 7.124, where start and end dates can be chosen with two pop-up calendars :

- via the *Main Planning Page*, by clicking on an empty cell (and then choosing "Holidays" on the Manage Day pop-up, 7.11.3.2) : both calendars will then be set to the date corresponding to the clicked cell ;
- or via the **New holidays** button as found on the *My Holidays Page* (7.11.5.1).

It is to note that both start and end dates can be modified. If user has enough days remaining to take her/his planned holiday, the request is validated and user is either redirected to the *Main Planning Page* or *My Holidays Page*, where this new request is seen as pending.

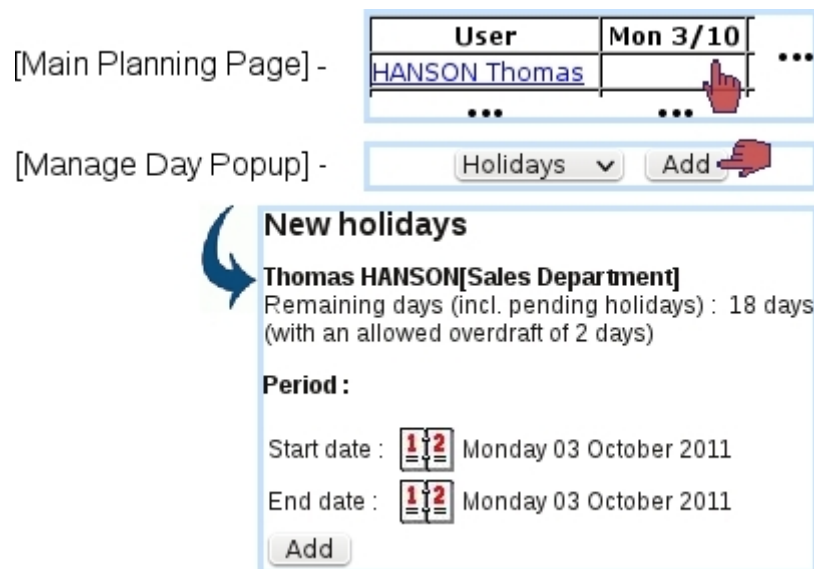


Figure 7.123: Defining new holidays, directly from the Holiday planning.

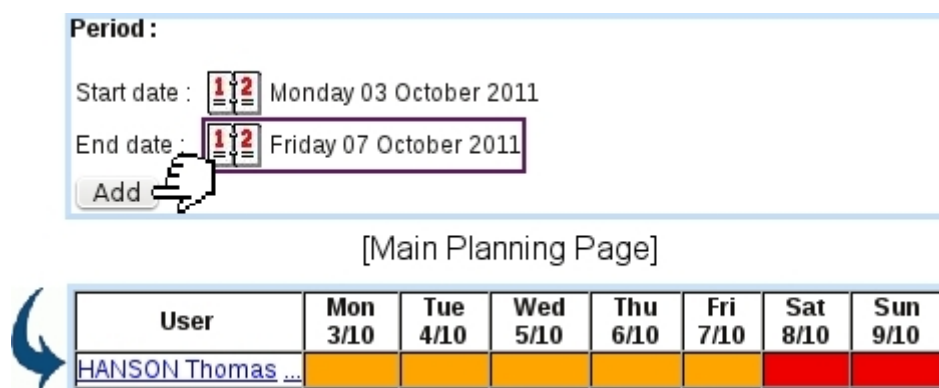


Figure 7.124: Once start and end dates have been chosen, new holidays can be finally validated.

The holiday request as created assumes that full days are taken ; **if user wishes to plan half-days (or more complicated hourly patterns), the (still unreviewed) request can be then modified (7.11.5.4).**

It is to note that, thanks to the overdraft amount as set during assessing workweek profile to users (7.11.4.4), a user can plan holidays/do modifications that go over her/his day balance.

### 7.11.5.3 Viewing holidays

[Jack's My Holidays Page] 17/01/2011 | 20/01/2011 | ... | [View](#) :

**View holidays**

User: **Jack JONES[Administrator]** - From 17/1/2011  to 23/1/2011

Holiday dates : **17/01/2011 - 19/01/2011** confirmed by admin on 14/1/2011 15:50

---

	Mon 17/1	Tue 18/1	Wed 19/1	Thu 20/1	Fri 21/1	Sat 22/1	Sun 23/1
8 - 9							
9 - 10							
10 - 11							
11 - 12							
12 - 13							
13 - 14							
14 - 15							
15 - 16			At shop				
16 - 17							

---

Figure 7.125: User Jack views his confirmed holidays.

A user can have a detailed view her/his holidays via the [View](#) link as available on the *My Holidays Page* (Fig.7.122). This link is always available whatever holiday's status is. Clicking on it leads to what is shown for instance on Fig.7.125 : the whole span of the holidays is shown vertically, while now horizontally, the schedule of days/hours is detailed.

This detailed view is also accessible from the *Main Planning Page* by simply clicking on the related holiday.

The span of displayed hours depends on user's planning properties (7.11.4.4).

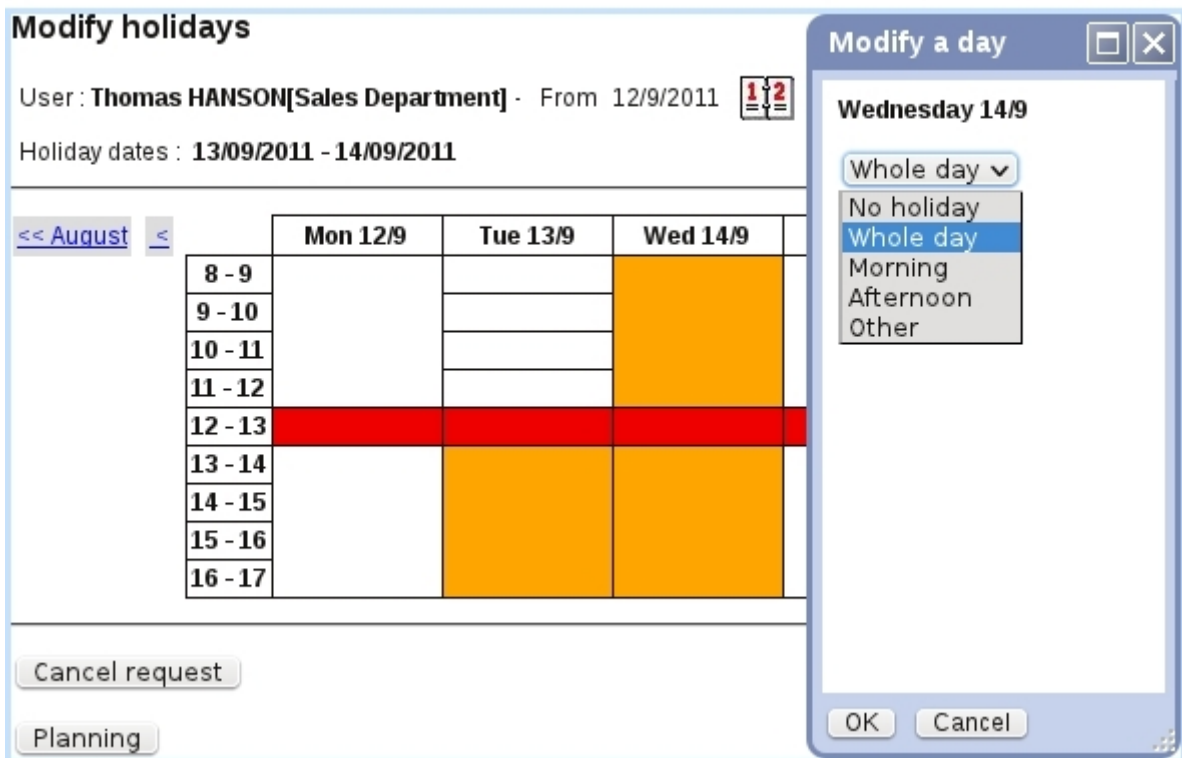


Figure 7.126: Showing the choices to which modify the Wednesday of this holiday request.

#### 7.11.5.4 Modifying holidays

For most users, i.e. whose 'Holiday' right as 'Create/Modify', modifying holidays is only possible with those which have not been confirmed/refused yet. "Manager" users, with 'Review' rights on the other can modify holidays which have been confirmed.

Accessing the page where a holiday is modified can be done :

- either from the *Main Planning Page* (provided that the displaying of pending holidays has been enabled through the checkbox) by clicking any day of the aimed request. This can be achieved by user herself/himself (provided that s/he is able to create holidays for herself/himself) and other users (provided their "Holiday rights" for 'All' are at least set to 'Create/Modify') ;
- or via the [Modify](#) link as available on the *My Holidays Page* (only for related user).

Either way, user is led to the page as featured in Fig.7.126, where, in a detailed presentation very similar to the *View Holidays* one, each day can be clicked on. A pop-up then appears with various choices, to apply changes to this selected day :

- canceling this day from the request ("No holiday") ;
- making it a Whole day ;

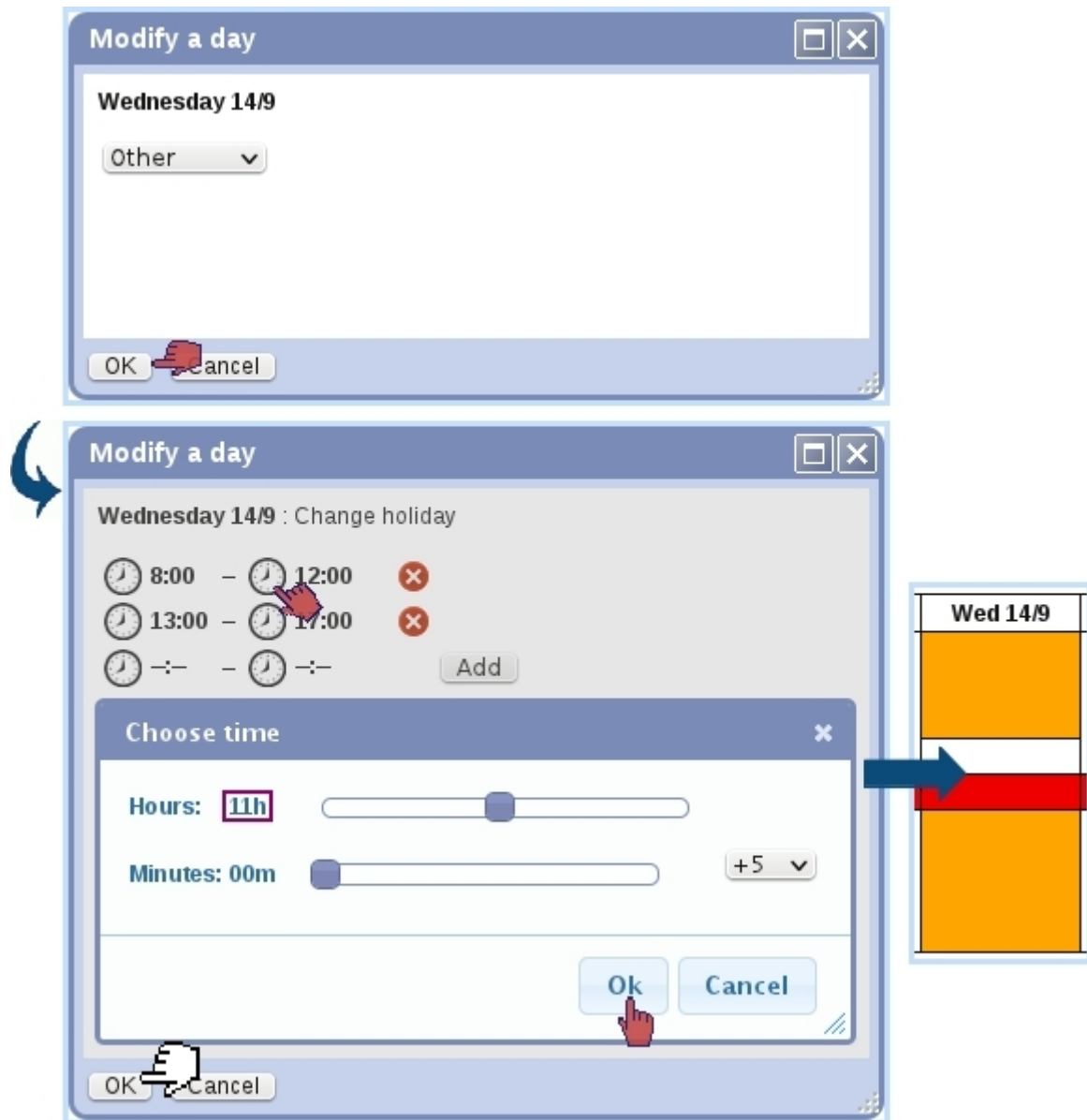



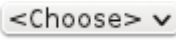
Figure 7.127: Defining a schedule for this Wednesday, where off-time is counted in a matter of hours and minutes.

- taking only the Morning or Afternoon ;
- choosing a detailed hourly schedule ("Other"), as shown on Fig.7.127.

A begin or end time is fixed the following way :

- the corresponding clock  is clicked ;
- a new window appears, where hour and minute sliders allow to choose a specific time ; depending on what has been selected in the menu right to the minute slider, minutes can be chosen either as :00 or :30 (" +30"), by gaps of 5 minutes (" +5") or by gaps of 1 minute (" +1") ;

- clicking on "Ok" then validates the time.

A predefined workday profile (7.11.4.1) can also be chosen in the  menu.

Whichever choice is made, and provided related user has enough hours left to make certain change, the modifying appears immediately.

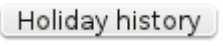
**7.11.5.4.1 Adding new days to a holiday request** If user has at least one day or enough hours left, s/he (or a high-clearance user with sufficient rights) can add a new day to the current holiday request as displayed on the *Modify Holiday Page* by simply clicking a blank day : a pop-up window, with similar choices as shown above (except of course for "No holiday") will be shown.

While it is possible to add a day that is not contiguous to the already-existing holiday period, it is not possible to add a day so that another request stands between this day and the current request.


**7.11.5.4.2 Canceling a holiday request** Similarly as for modifying, a holiday request can be canceled by related user if it has not been confirmed yet. "Manager" users, with 'Review' rights, can cancel requests which have been confirmed.

The cancellation is then achieved via the  button as seen on Fig.7.126.


#### 7.11.5.5 User's holiday history

A page displaying a user's holiday history for the current year (as well as for the previous year) is available through the  as found in the User's Information pop-up (7.11.3.1). This page can also be accessed directly via user's name click-link as found on the *Manage Users' Holidays Page* (7.11.5.6) and the *Credit/Debit Page* (7.11.5.9).

An example of holiday history is featured at Fig.7.128. This page shows for this particular user and the current year the various holidays that have been confirmed, as a click-link to the *View Holiday Page* (7.11.5.3) ; also shown are holiday credits and debits (other than vacations) that have been done for this user (7.11.5.9).

At the bottom of the User's Information pop-up (or at the bottom of the page when holiday history is accessed through the aforementioned other means) lies a  button allowing to generate a formatted PDF file of the display, along a print model (13.2).

#### 7.11.5.6 The *Manage Users' Holidays Page*

For users that have been granted sufficient ('Credit/Debit') "Holiday rights", the *Manage Users' Holidays Page* is accessed through the  button rendered available at the *Main Holiday Page*.



[Main Planning Page] [Jane Kovács](#) / [Holiday history](#) :

**User information**

**Holiday history**

**Jane KOVÁCS[Accounting]**  
Pending holidays : 5 days

Year :

Request	Confirmation	Label	Days	Hours
-	03/01/2011	Transfer 2010-2011	10	6
-	05/01/2011	Credit 2011	25	0
11/03/2011	14/03/2011	<a href="#">21/03/2011 - 01/04/2011</a>	-10	0
15/06/2011	17/06/2011	<a href="#">20/06/2011 - 24/06/2011</a>	-5	0
<b>Total :</b>			<b>20</b>	<b>6</b>

**Remaining holidays : 20 days 6 hours**

Print model :

Figure 7.128: The *Holiday History Page*.

[Main Planning Page] [Staff holidays](#) :

**Staff holidays**

User group :  User :

User status :  User type :

Request status :  Year :  - Print model :

---

**2 pending requests, group Accounting, 2011 :**

User	Request date	Period	Status	
<a href="#">KOVÁCS Jane</a>	24/11/2011	05/12/2011 - 09/12/2011	Pending	<input type="button" value="Review this request"/>
<a href="#">RUSSELL Mary</a>	15/11/2011	07/12/2011 - 09/12/2011	Pending	<input type="button" value="Review this request"/>

Figure 7.129: The *Manage Users' Holidays Page*.

There, as featured on Fig.7.129, search tools consisting in user groups, users, user access status, holiday status and year allow to display holiday requests. For confirmed requests, a  button is available to generate a print-friendly PDF account on the request, along a print model (13.2).

For pending requests, if user has even superior rights ('Review'), a **Review this request** button is available to accept or deny this holiday request (7.11.5.7).

The **Credit management** button leads to a page where users' holiday credit can be modified (7.11.5.9).

**7.11.5.6.1 The "Pending request" event control** When a user logs in, provided that s/he has got 'Review' rights, the pending requests to process (7.11.5.7) may be conveniently displayed in an event control (1.3) as featured in Fig.7.130. There :

- each request can be clicked and reviewed individually ;
- the more [more](#) link leads to the *Manage Users' Holidays Page* where all pending requests (whichever the user, user group and year) are displayed.



Figure 7.130: The HRM event control, displaying pending holiday requests to process.

### 7.11.5.7 Accepting/refusing a user's holidays



Figure 7.131: The displaying of full user group's schedule helps to decide whether to accept or not user's requested holidays.

With conditions stated above, the **Review this request** is available and leads to the page as featured at Fig.7.131, where :

- related user's holidays are displayed in all their duration, along with the holiday schedule of all the users of her/his user group : this thus allows to have a documented view of what everyone in the related user group is at at the time of those requested holidays. Therefore, this allows for instance to prevent that everyone in the same user group might be on holidays at the same time ;
- this schedule can be browsed in a weekly or monthly way, along with two browsing calendars (similarly as on the *Main Planning Page*) ;
- clicking on any pending day, whether it belongs to the reviewed user or any user of her/his group, allows to see it in detail and even to modify it, similarly as in 7.11.5.4.

When decision is made, holiday request is either confirmed or denied via the **Accept** and **Refuse** buttons.

Whatever the decision is, an email is sent to the user who requested the holidays, and also, if applicable, to the users who were set as the recipients of confirmation mails (7.11.4.7).

#### 7.11.5.8 Pre-evaluating a user's holidays

Some users (who are for instance the leader of their group), though they do not have the administrative rights to accept or refuse holiday requests, may nonetheless be able to give their opinion - positive or negative - on a holiday request ; this is ruled by the 'Holiday supervisor' right (7.11.2).

For instance, Tom, who has this right set to 'Evaluate' for his group and user Richard had been set as a (passive) sender of holiday notifications (7.11.4.7) : these are the two conditions for the 'Evaluate : ' choice to appear on Richard's *Modify Holiday Page* as seen by Tom (Fig.7.132).

This possibility helps administrators (who might not always be up-to-date about the schedule of a user group) to make the decision of accepting or refusing holidays.

#### 7.11.5.9 Managing users' holiday credit and debit

As a depleting resource, holidays are replenished from time to time in the form, for instance, of a yearly credit. To do so, a convenient page is accessible via **Staff holidays** / **Credit management** (a button which only appears when user's "Holiday management" (7.11.2) is at least set to 'Credit/Debit'), as featured on Fig.7.133. There :

- a specific user group and/or user can be chosen (and user access status, 9.4.3), as well as year on which the operation will be credited/debited on ;

[Harry's Modify Holidays Page, as seen by Tom] :

### Modify holidays

User : **Richard MALONE**[Sales Department] - From 11/6/2012 1 2 to ...

Holiday dates : **11/06/2012**

---

<< May <

	Mon 11/6	Tue 12/6	Wed 13/6	Thu 14/6
8 - 9				
9 - 10				
10 - 11				
11 - 12				
12 - 13				
13 - 14				
14 - 15				
15 - 16				
16 - 17				

---

Evaluation :

[Harry's Review Holidays Page, as seen by Admin] :

### Review holiday request

User : **Richard MALONE**[Sales Department] - From 11/6/2012 1 2 to ...

Holiday dates : **11/06/2012** - Evaluation : Positive(Thomas HANSON)

...

Figure 7.132: Tom, a holiday supervisor for his own group, views Richard's unconfirmed holidays and can give his opinion on them.

- on the then displaying list of users, each of them can be chosen (or not) via a checkbox (it is also possible to select all users through the eponymous button) ;
- an amount of days and/or hours is given, to be either credited or debited ;
- a label can be entered, which will then be displayed on the *Holiday History Page* (7.11.5.5).

Also, a  button conveniently allows to automatically transfer vacation balance of selected users to the year following the one featured in the menu ; for instance, if "Transfer selected users balance to 2013" appears (year 2012 is selected in the menu) :

- clicking on that button will thus set to 0 balances for 2012 and,
- on *Holiday History Page* for 2013, the transferred balances will appear with the label "Transfer 2010-2011".

**Users' holiday credit management**

User group : [Sales Department](#) User : [<All>](#)

User status : [Enabled](#) User type : [merchant company](#) [Search](#)

Year : [2012](#)

	User	Current workweek profile	Days	Hours
<input checked="" type="checkbox"/>	<a href="#">HANSON Thomas</a>	Regular	11	4
<input checked="" type="checkbox"/>	<a href="#">MALONE Richard</a>	Regular	9	4
<input type="checkbox"/>	<a href="#">ROBBS Harry</a>	Sat Morning	16	5

[Select all](#)

Add to selected users  days -  hours

Credit  Debit

Label : [Bonus AAA Salesmen](#)

On year : 2012

[Add](#)

---

Transfer selected users' balance to year : 2013

[Transfer](#)

Figure 7.133: An example where some extra holidays are credited to a few selected users.

### 7.11.6 Overtime management

During the course of a company's life, employees may have to work further hours than they are supposed to or work during days where their weekly schedule (7.11.4.1) means they are not supposed to.

This is why Blue Chameleon's HRM handles the management of overtime, through a simple interface, which can be brought up in two ways :

- by clicking on a white part of the planning, bringing up the Manage Day pop-up (7.11.3.2) and choosing 'Overtime' ;
- by clicking on a red part of the planning for adding work in that normally un-worked day.

Fig.7.134 shows for instance how a Saturday morning is declared as worked, by a user who is not supposed to work that day. On the then-displayed *Change Work Schedule Page* :

- hour and minute menus for start time and end time are displayed, from which a worked span can be filled in ;
- several worked spans can be **Add**'ed, provided than they do not overlap ;
- a worked span can be deleted through the **✖** icon ;
- a predefined worday profile (7.11.4.2) can be selected in the **<Choose>** menu to load a specific schedule.

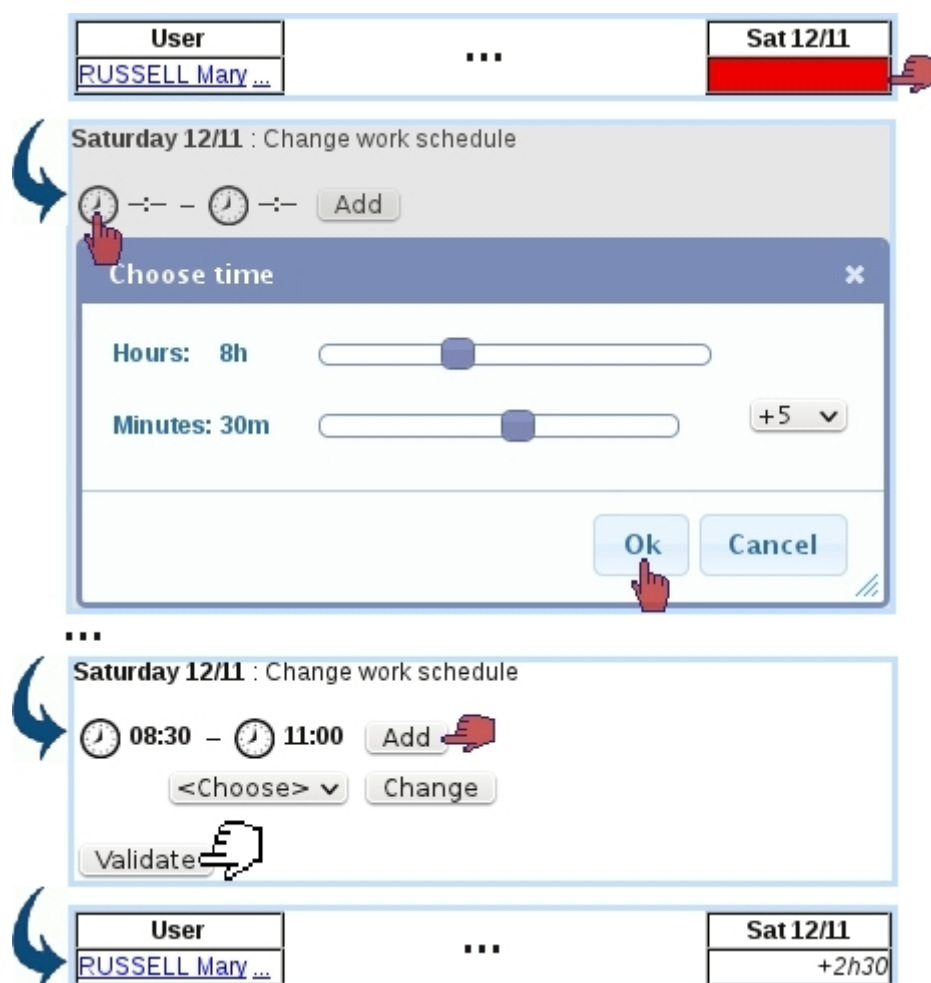


Figure 7.134: Declaring this Saturday morning as worked.

Afterwards, the overtime is featured on the *Main Planning Page* : the clicked cell has been rendered white and the overtime amount in hours and minutes is featured.

The adding of overtime for an already-worked day is done through a similar interface, except than worked times are pre-loaded. They can be modified and other worked spans can be added :

Tue 8/11  
 [Manage Day Popup] Overtime ▾ Add :

**Tuesday 8/11** : Change work schedule

🕒 8:00 – 🕒 12:00 ❌

🕒 13:00 – 🕒 17:00 ❌

🕒 :-: – 🕒 :-: Add

<Choose> ▾ Change

Validate



Changing the schedule of an already-worked day also allows to define **undertimes**, e.g. in case employee got in late. They will be featured as negative time, for instance ”-3h30”.

Overtimes can be seen as a summary on the month’s work history (7.11.8).

### 7.11.6.1 Modifying overtimes

Once a planning cell is endowed with overtime (or overtime), this overtime can be modified by using the ”Overtime” option again at the bottom of the *Manage Day Popup* (Fig.7.135).

Tue 8/11  
 +2h45 [Manage Day Popup] Overtime ▾ Add :

**Tuesday 8/11** : Change work schedule

🕒 8:00 – 🕒 12:00 ❌

🕒 13:00 – 🕒 19:45 ❌

🕒 :-: – 🕒 :-: Add

<Choose> ▾ Change

Validate

Figure 7.135: Accessing the details of a workday.

### 7.11.7 Changing a workweek or a workday to another profile

The configuring of workweek profiles for an employee (7.11.4.4.1) showed extensive and detailed possibilities for those for the whole year.

Now, in order to change in a more casual way, by user herself/himself (or, depending on the user rights, others users) the profile of a week (stemming for instance from an exceptional change) for profile of a particular week, Blue Chameleon's HRM allows it to be done directly from the planning, by bringing up the Manage Day pop-up (7.11.3.2).


There, a menu below 'Weekly planning' shows the current workweek profile that had been configured for the week ; this menu features all already-defined workweek profiles (7.11.4.1) and it is then possible to change week to any of those.

The same can be done for a single day : a particular planning can be set for the clicked day, **independently from the week's profile**. Under 'Daily planning', the already-defined workday profiles (7.11.4.2) are shown and the clicked day can then be set to any of those. In order to reinitialize the workday profile to the one given by the workweek profile, 'Choose' must be selected.

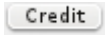
## 7.11.8 Work history

In order to keep track of overtimes at a glance, or more generally to check the number of worked hours, holidays and sick leaves in a month, Blue Chameleon provides a detailed monthly account of the work history. It is accessed through the eponymous button as found on the User's Information pop-up (7.11.3.1).

Fig.7.136 shows an example where the overtimes as defined as examples in 7.11.6 can easily be seen. The normally-worked days, as defined by employee's weekly schedule (7.11.4.1), is shown just after the 'Activity' column. Any day which is at least partially worked (this includes days which are partially holidays or sick leaves) is featured there.

At the bottom of this popup, a PDF version of the month's work history can be ed out along a print model (13.2).

### 7.11.8.1 Converting overtime

As seen on Fig.7.136, next to each overtime, there is a  button that allows, as shown on Fig.7.137, to convert overtime in a equal amount of vacation time. This button only appears if user has 'Credit/Debit' rights.

Clicking on this button shows a popup where a time range is chosen, the amount of which will be added as vacation hours. In this example, the overtime corresponded to a worked Saturday morning, from 8 to 12 ; we choose to fully convert it by inputting those times in the hour menus.

As a result, on the *Holiday History*, this credited will appear as 'Compensation [Date]'.



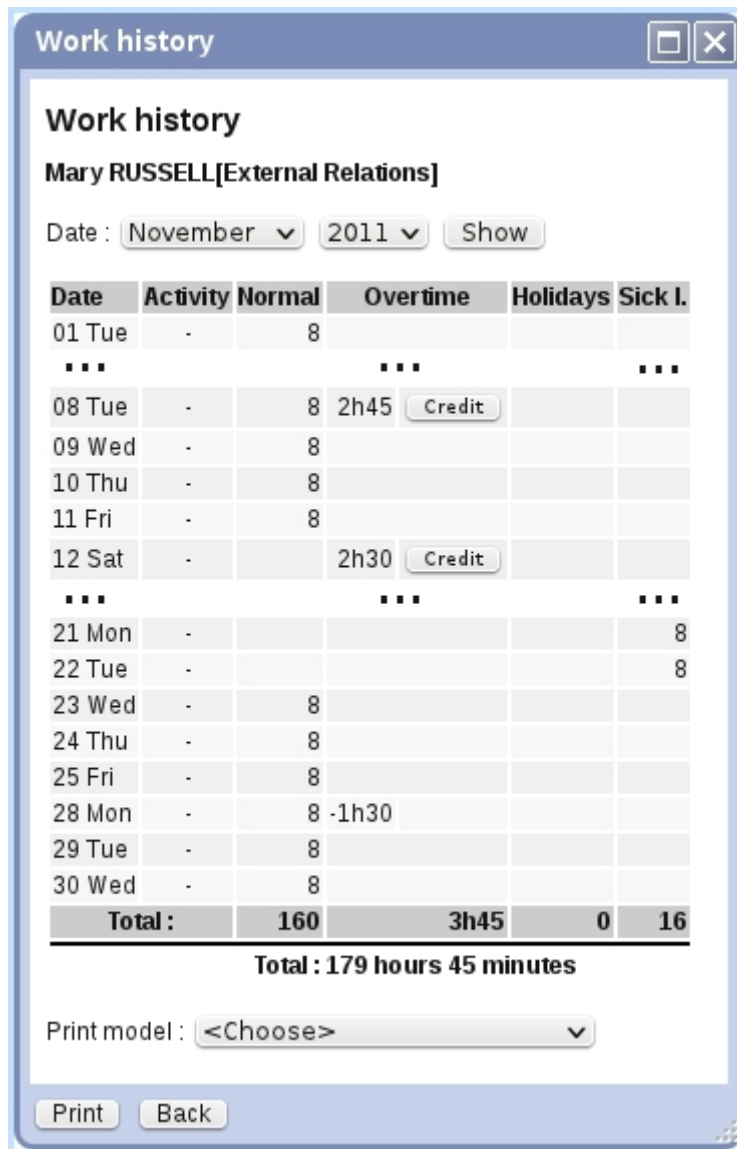


Figure 7.136: The work history for this user on November 2011.

### 7.11.9 Sick leaves

Sick leaves are planned and handled in a very similar way as for holidays, but this time without restriction of a limited number of days, and according to the value of the "Sick leave right" (7.11.2).

Declaring a sick leave is then done :

- by clicking on an empty cell on the *Main Planning Page*, thus bringing up the *Manage Day* pop-up (7.11.3.2) and choosing "Sick leave" there ; it then redirects to an identical page (with two calendars) as seen for new holiday planning ;
- by clicking on a cell that already contains a sick leave ; redirected on a *Modify Planning Page*, identical to the *Modify Holidays* one (Fig.7.126), it becomes possible, by clicking on an empty day, declare this day as a sick leave.

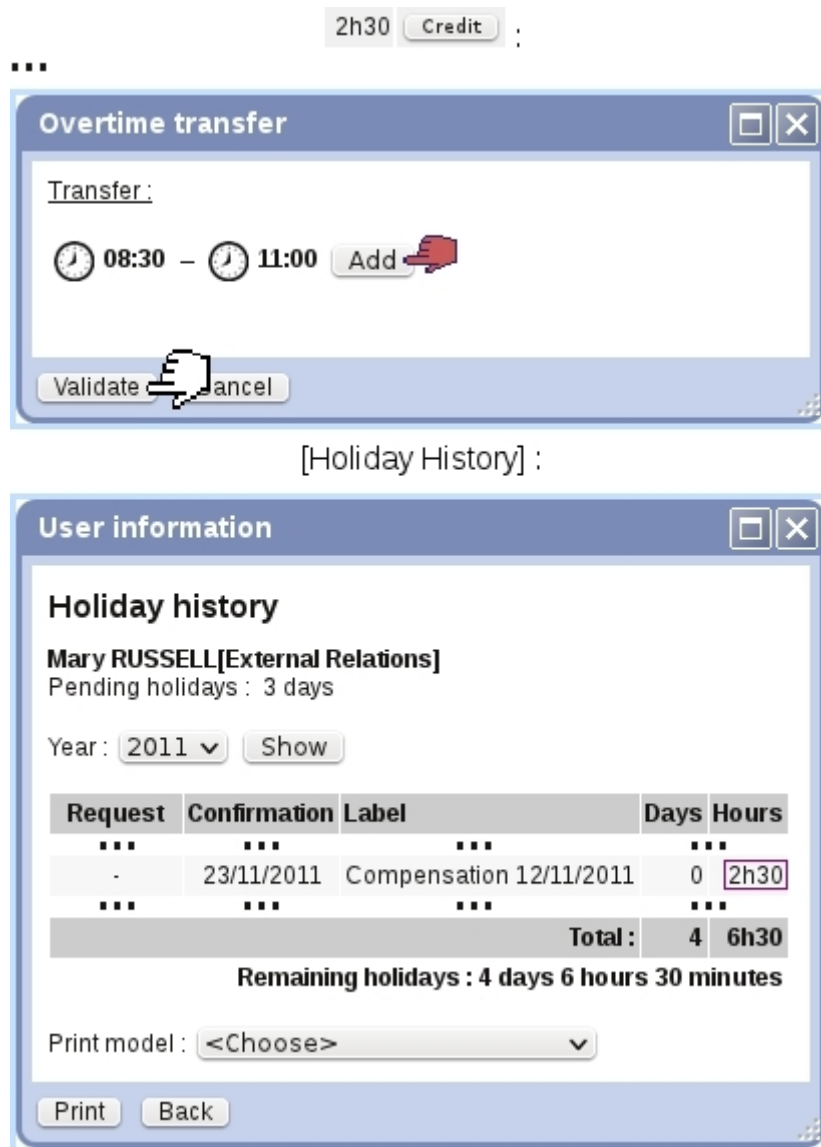


Figure 7.137: Crediting overtime as vacation time.

### 7.11.9.1 Modifying sick leaves

Modifying already-defined sick leaves is done through the *Modify Planning Page*, where clicking on the sick day brings a pop-up where sick leave can be modified to Morning only or Afternoon only, to the Whole Day, or to another more complicated schedule (just as in Fig.7.127). The sick leave for that can be also canceled through the 'None' choice.

### 7.11.9.2 Sick leave history

Identically as for holiday history, a reminder of a user's sick leave history for the current year (and also the previous one) can be displayed through the **Sick leave history** button as found on the User Information pop-up (7.11.3.1). A **Print** tool to generate a PDF account of the user's sick leaves (dates) is also available.

## 7.11.10 Activities

If wanted, activities as used in the planning aim to make more precise what an employee is at ; they are individually assessed to a particular user at a particular day.

For the 'activities' feature to be properly used :

- Activity categories (7.11.4.6.1) and activities (7.11.4.6.2) must be defined ;
- a category must be assessed to each user (7.11.4.4), if one wants her/him to use them.

### 7.11.10.1 Setting activities for a day

Most easily, activities can be assessed from the Manage Day Popup (7.11.3.2) for any day ; the conditions as cited above must be filled. In addition to this, user must have enough rights to assess 'Activities' (7.11.2).

As featured on Fig.7.138, the *Manage Day Popup* is opened for user Tom on a certain day ; he was configured on his *Configure Employee Page* (7.11.4.4) as belonging to the category 'Salesmen', for which two activities 'At shop' and 'Biz trip' were defined. They can be thus assessed to him, one for the morning, one for the afternoon.

[Manage Day Popup, HANSON Thomas, 23/03/2012] :

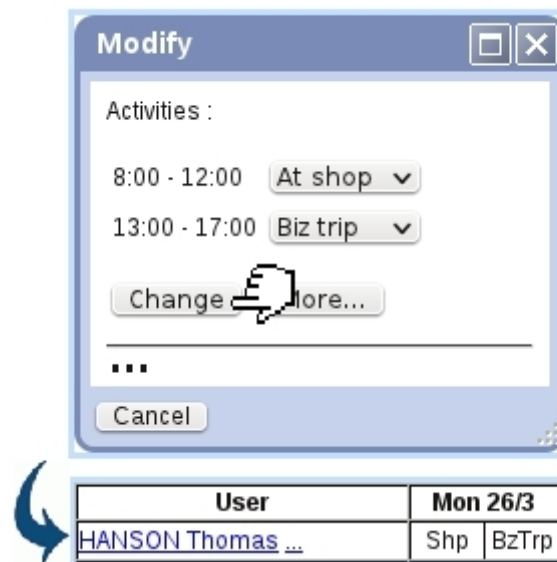


Figure 7.138: Changing Tom's activities for a day.

Happening in the same day, they finally appear in the planning in their short label form, as to reduce the span of the display.

### 7.11.10.2 Setting activities for a week or month

As the previously described daily setting of activities can be too time-taking for long, homogenous periods of activities, the **More...** button as seen right to the **Change** one (Fig.7.138) allows for weekly and monthly settings of activities.

As shown at Fig.7.11.10.2, clicking on the **More...** button then displays a popup where two choices are available through a toggle : either show the current week, or the current month :

- in the former case, activities of that week are set day by day (that is worked), with a single choice for each day, applying to the whole day ;
- in the latter case, activities of that month are set week by week (for each week that at least has a worked day), with a single choice for each week, applying to the whole week.

This systems allows for fast configuring of employees' activities, if those do not vary much during a day or during a week. If activities set that quick way need to be fine-tuned for a certain day, it can still of course be modified in a daily way as described in 7.11.10.1.

[Manage Day Popup, HANSON Thomas, 18/06/2012] [Activities] More... :

**Modify activities**

**Activities for HANSON Thomas**

Week 18-24 June 2012  June 2012

Mon 18/6	Tue 19/6	Wed 20/6	Thu 21/6	Fri 22/6	Sat 23/6	Sun 24/6
At shop ▾	At shop ▾	At shop ▾	Biz trip ▾	Biz trip ▾	.	.

Modify Cancel

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**Modify activities**

**Activities for HANSON Thomas**

Week 18-24 June 2012  June 2012

Set weeks to :

28/05/2012 - 03/06/2012 : <Choose> ▾

04/06/2012 - 10/06/2012 : <Choose> ▾

11/06/2012 - 17/06/2012 : <Choose> ▾

18/06/2012 - 24/06/2012 : <Choose> ▾

25/06/2012 - 01/07/2012 : <Choose> ▾

Modify Cancel

Figure 7.139: Setting activities for a whole week or a whole month.