

OpenGroupware

(OGo)

Quick Reference Guide

This document was originally developed and written with funding provided by the Virginia Bioinformatics Institute at Virginia Tech.

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Introduction

What is “groupware”

Groupware is software intended create an environment that will foster communication and coordination among a group of people. There are numerous products available that fit the “groupware” definition; each product having its own distinctive functions in addition to, what might be known as, core functions. Some examples of core functions might include the following:

- Project and task definition
- Collaborative writing
- Workflow systems
- Group calendaring
- Hypertext linking
- Email and mailing lists
- Newsgroups

Any groupware solution should provide users with the ability to create a work area or project, define and schedule tasks for the project, manage and share documents, images, data or messages associated with the project and define who can access information associated with the project.

What is “OpenGroupware”

OpenGroupware (OGGo) is open source software that implements many of the core functions mentioned previously. This groupware solution is freely available and is supported by its users on a volunteer basis who provide not only bug fixes, but also enhancements and new functionality.

OGGo provides a very flexible environment in which we may create workspaces that may be used for just about anything.

Additional information about OGGo may be obtained on the internet at <http://www.opengroupware.org/>.

Why do I care?

OGGo can help the it’s users manage projects by providing a robust, loosely configured, environment in which to manage information. While providing a controlled repository for data, the tool offers much flexibility for individual project configuration, which will allow each user to operate in the manner that is most comfortable.

A few specific functions of OGGo that may contribute to the success of an organization are as follows:

- The ability to define a project that encompasses all tasks and documentation associated with a project.
- The ability to grant full or partial access to information contained within a project to any user of the system.

- By granting access to specific information in your project, you can establish a collaborative writing environment where multiple users may contribute to project efforts.
- By defining tasks or milestones for your project and assigning those tasks to system users, you create a type of workflow wherein each user will receive notification of those items that he/she is responsible for completing along with associated due dates. That information appears on the users “home” page immediately after successful login to the system.
- By including links to other projects/workspaces in a project, we may create “imbedded” projects, threaded discussions and the like.
- OGo is a web-based product, accessed through a centralized authentication database; available with any Internet enabled computer and standard browser.
- Navigation through and among your projects, calendar and contacts are accomplished via familiar hypertext links.

I hope you enjoy your tour ...

OpenGroupware “Home”

The OGo software can be run from a standard web browser on a network-connected computer by visiting the web site at `http://{your server here}`. A centralized server handles authentication (login) for OGo.

The “home” page, displayed when you log in (shown in Figure 1), lists tasks and appointments for the upcoming week (7 days). Along the left side of the window are links through which you will navigate to additional areas of functionality such as projects, tasks, calendar, contacts or mail. This section of the OGo screen is known as the dock area. At the top of the opening screen is a navigational aid, called “You are here:” that will maintain a brief history of functions you’ve visited and facilitate return to one of those areas.

Each of the primary functions of OGo is available from links provided in the dock area at the left side of the “home” page as seen in the following figure. These links will be briefly described here and in more detail later in this document.

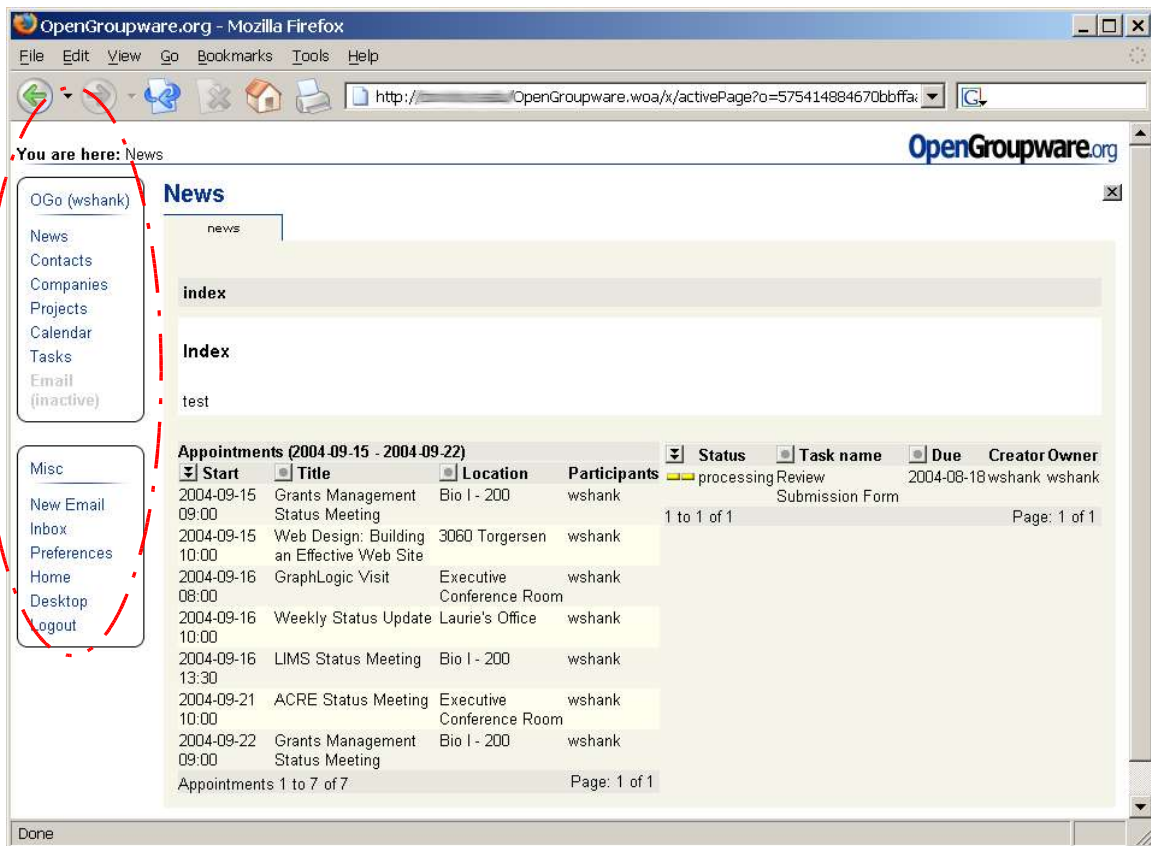


Figure 1 - OpenGroupware "Home"

The “News” option is displayed on the opening screen at login. It contains general announcements, provided by system administrators, followed by lists of appointments and tasks that are “due” during the following week. Each of the appointment/task entries is a link that can be clicked to open the entry for more information.

The “Contacts” option opens a screen, called “Lookup Contacts” that may be used to view contact information. Additionally, you can add new contacts, edit existing contacts or

import contact data from several external sources such as Microsoft Outlook, Netscape or comma/tab separated files. See the section for “Contacts” on page 5 for more information.

The “Companies” link opens the “Lookup Companies” screen that, similarly to the contacts screen, is used to view, add or edit company data. Like the contacts function, company data may be imported from selected external data files. See the section for “Companies” on page 5 for more information.

The “Projects” link opens the “Projects” area of OGo. This will be the initial entry point for the definition of a new project. As described later in this document, you may include contacts, documents, tasks and notes in your project and you may assign access permission for system users. See the section for “Projects” on page 17 for more information.

The “Calendar” option opens the calendar to the current week view. From this window, you may change to a different view, add an appointment or generate a printable version of the calendar. See the section for “Calendar” on page 42 for more information.

Clicking on the “Tasks” link will open the “Tasks” information screen. All tasks that you have created will be shown on this screen on one of the three available tabs:

- “to do list” – current, open tasks that are assigned to you
- “delegated tasks” – current, open tasks that you have created but assigned to another individual
- “archived tasks” – tasks that you created and have chosen to archive.

See the section for “Tasks” on page 34 for more information.

The “Email (inactive)” link displays a screen to specify an appropriate email server, user account and password. This link will be dimmed until the user enters valid mail server information. When the link is dim/gray and reads “Email (inactive)” email is unavailable through OGo. When the link is light/blue/normal link color and reads “Email,” email is available.

The “New Email” link opens a screen that may be used to create an email note if you are logged into a mail server. If you have not yet successfully logged into a mail server, you will be prompted to enter a valid user ID, password and server name before the inbox will be displayed.

The “Inbox” link displays your email “inbox” if you are logged into a mail server.

The “Preferences” link is used to specify several default settings that are used each time you log in to OGo. Available settings include such things as the default tab displayed in areas that have tabbing, your home time zone, whether you will use the OGo email editor or an external editor (for some mail links), initial calendar view and much more.

Clicking on the “Home” link opens a new window containing a previously specified Internet browser bookmarks file. The name and location of this file is specified through the “Preferences” function (see page 55 additional detail).

The destination for the “Desktop” link is another bookmark file, specified by the OGo administrator. It is the same file for all system users.

The links for “Home” and “Desktop” are to be removed in a future release (OGo 1.0a).

The “Logout” link logs the current user completely out of OGo and the email server if applicable.

OpenGroupware Functions

Contacts

To begin working with contact information, select the “Contacts” link from the OGo dock area. The “Contacts” screen, shown in the following figure, displays existing contacts and allows for creation of new entries through manual entry or by import from selected external data sources.

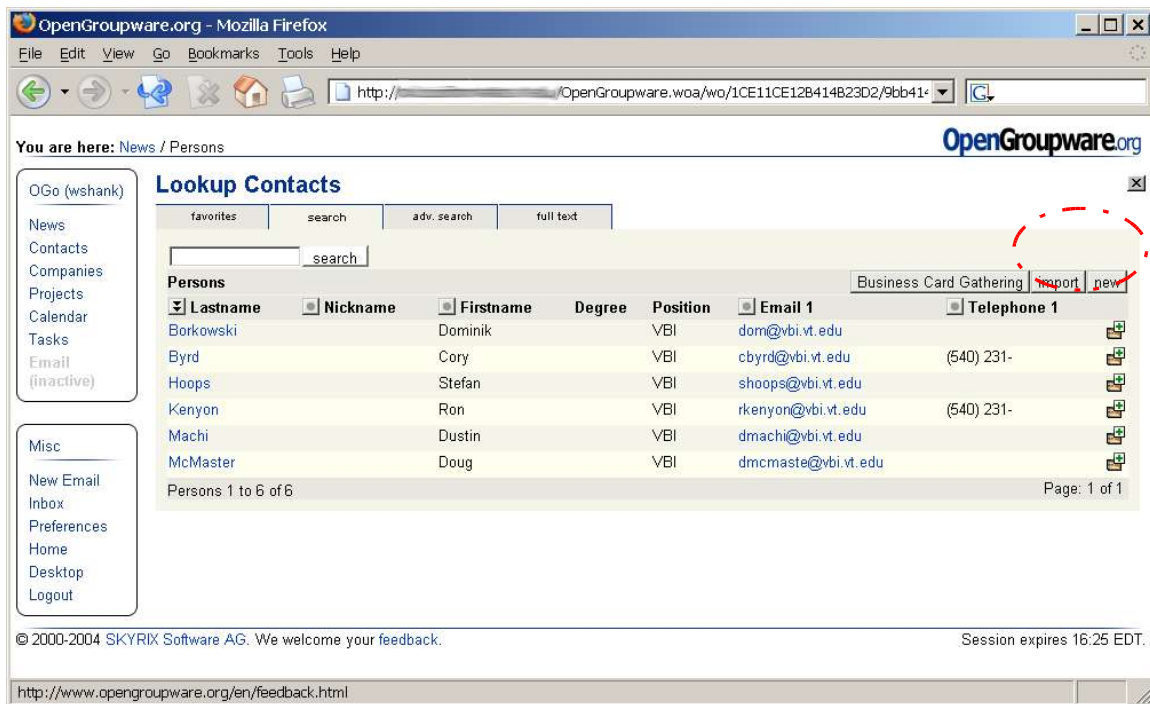


Figure 2 - Search Contacts Screen

How do I add a contact?

Each user can add contacts to OGo by manually entering the relevant data or by importing data from a supported external source. See Appendix A – Supported Sources of Contact/Company Import Data on page 68 for a list of supported external data sources.

Manual data entry is accomplished by selecting the **new** button near the right side of the screen. The “Person Editor” screen is displayed as shown in Figure 3.

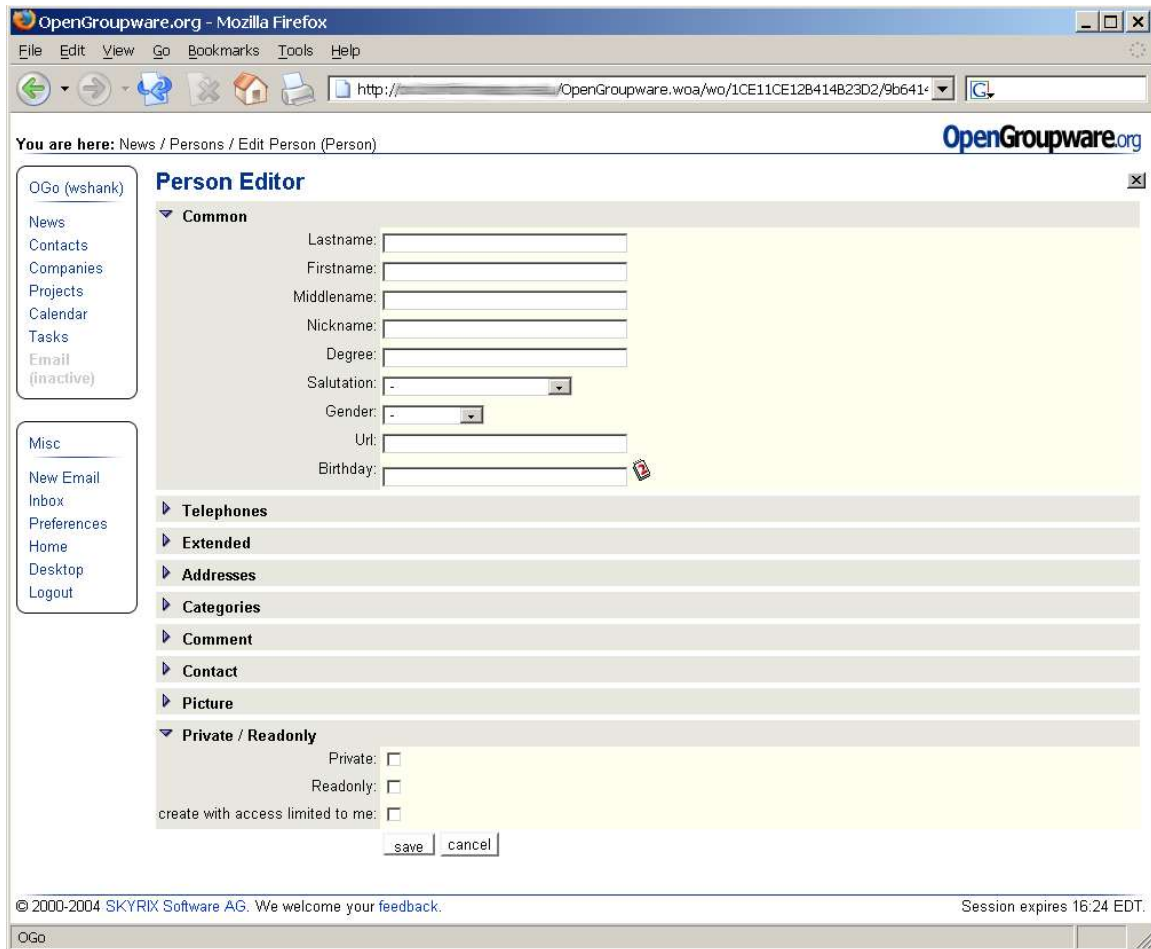



Figure 3 - Add New Contact (Manual)

There are nine sections in this form, each containing numerous, optional data elements to describe the contact. Clicking on any of the s will expand the selected section to display the fields that are available. Security for the contact information is specified in the “Private / Readonly” section. The difference between a contact that is “Private” and one that is “create with access limited to me” is that the limited access will allow the contact to be linked to a company definition; private will not. Both settings cause the entry to be invisible to other OGo users.

To import contact data from an external program, you must first export the data to a file using the external program. When a suitable contact file is available, you may select the **import** button to open the “Import persons” screen, shown in Figure 4.

A “file” and “file format” specification is required. Select the **upload** button to initiate import processing. The import of a comma/semi-colon delimited file begins by asking the user to specify data element mappings by displaying a sample record. When mapping is complete, press the **import** button to copy contact records from the data file into OGo.

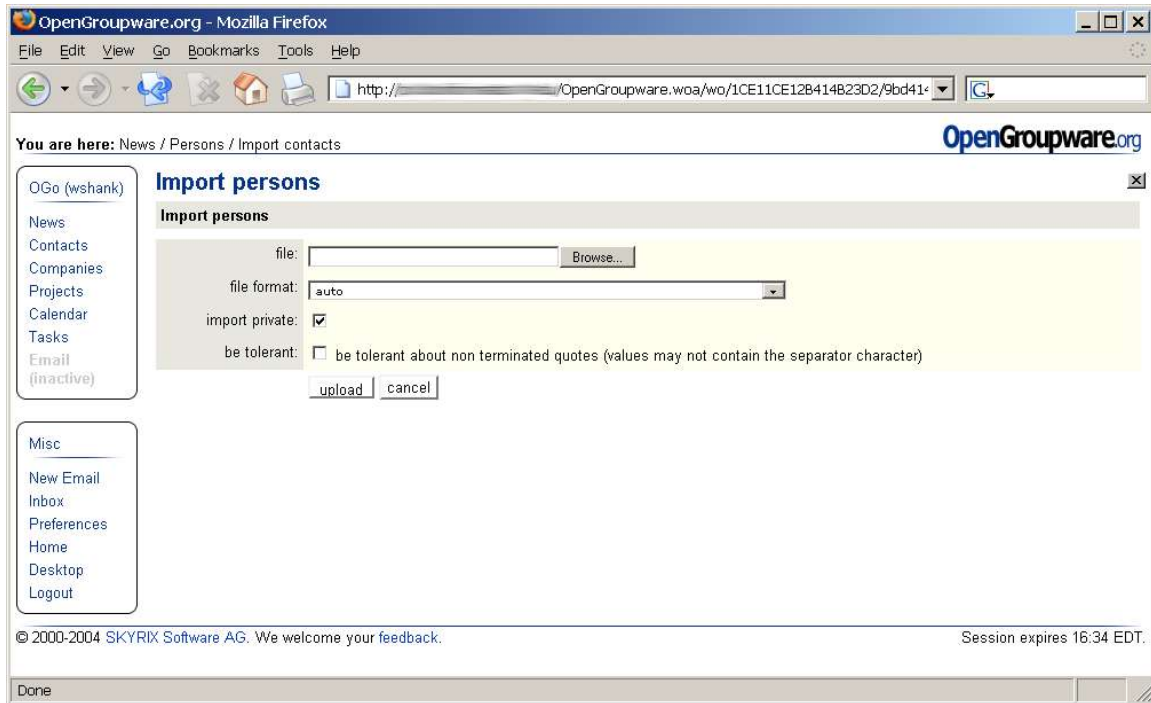



Figure 4 - Import Persons Screen


The **Business Card** button/function allows the user to link contact data and company data to facilitate alternate data retrieval methods.

How do I search for a contact?

In addition to the options for adding contact information, the “Lookup Contacts” screen (Figure 2) contains four tabs of options for searching contact information. The tabs and the distinguishing features of each are as follows:

- favorites – This tab contains a list of those contacts that you have previously designated as “favorite” or commonly used contacts. A contact is designated as a “favorite” as follows:

1. Search for contacts using any of the additional search methods.
2. Click the  icon at the right-hand end of the contact row.

To remove a contact from “favorites”, display the favorites list and click the  icon at the right-hand end of the contact row.

- search – Enter any part of a contact name and press the **Search** button. A list of contacts, which contain the specified characters in a **name** field, will be displayed. Click on any contact record to display the “Person Viewer” screen with additional contact information. If only one contact record matches the specified character string the “Person Viewer” screen will be presented instead of a list. The “Person Viewer” screen will contain the contact information for the matching record.
- advanced search – Similar to the search tab described above except that any field in the contact record database can be searched for matching information. Complex

searches can be accomplished by entering data in multiple fields. After specifying the desired information, press the **Search** button to execute the query and display either a list of names if multiple matching records are available, or the “Person Viewer” screen if there exists only one matching record in the database.

The bottom section of the advanced search tab (labeled *Save Search*) allows the user to save the search criteria specified by supplying a name and clicking on the **Save Search** button. The criteria may then be reloaded and executed in the future by returning to the advanced search tab and selecting the criteria from the list-of-values on the right-hand side of the *Save Search* section of the screen.

Finally, the *Save Search* section of the advanced search tab contains a selection option to “Create Tab” from the search criteria. By selecting this option, a new tab will be added to the standard four, identified by the name supplied and containing any contact information that matches the search criteria.

- full text – Like the “search” tab except that multiple strings separated by a space, may be entered as a search string. There are options to “match all words” and to “match one word”. As in the “search” tab, only the name fields are searched for matching characters.

How do I update a contact?

The first step to update an existing contact is to retrieve and display the contact record. Retrieval of the contact record can be accomplished through one of the search methods described in the section entitled “How do I search for a contact?” on page 7. Upon locating the contact record, display the “Person Viewer” screen by clicking on the contact’s last name. The “Person Viewer” screen contains two sections, each with an **edit** button, as seen in the following figure. There are actually **edit** buttons on three of the tabs contained on the “Person Viewer” screen.

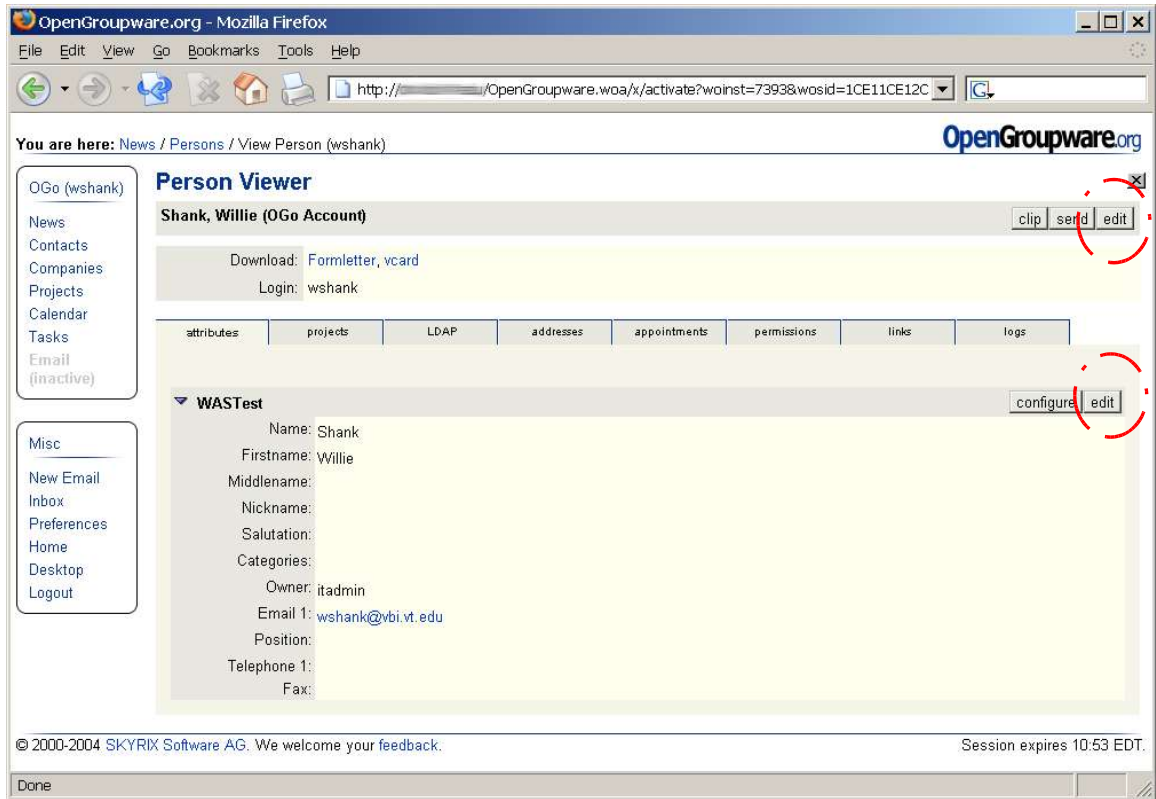


Figure 5 - Person Viewer Screen

The `edit` button labeled “1” in Figure 5 allows the user to update information such as name, multiple telephone numbers, multiple email addresses, multiple physical addresses, comments, and whether the contact record is “Private” or “Readonly”.

The `edit` button labeled “2” in Figure 5 appears on the tabs for “attributes”, “addresses” and “permissions”. The type of contact information that can be updated on each of the tabs is as follows:

- “attributes” – contact name.
- “addresses” – private, mailing and location addresses.
- “permissions” – more granular security settings for the contact record. Read or write access can be granted to contact records by individual or by group.

How do I configure display of contact information?

The user has the option of defining the contact attributes that are displayed on the “attributes” tab of the “Person Viewer” screen. The `configure` button will display an attribute selection screen as seen in Figure 6.

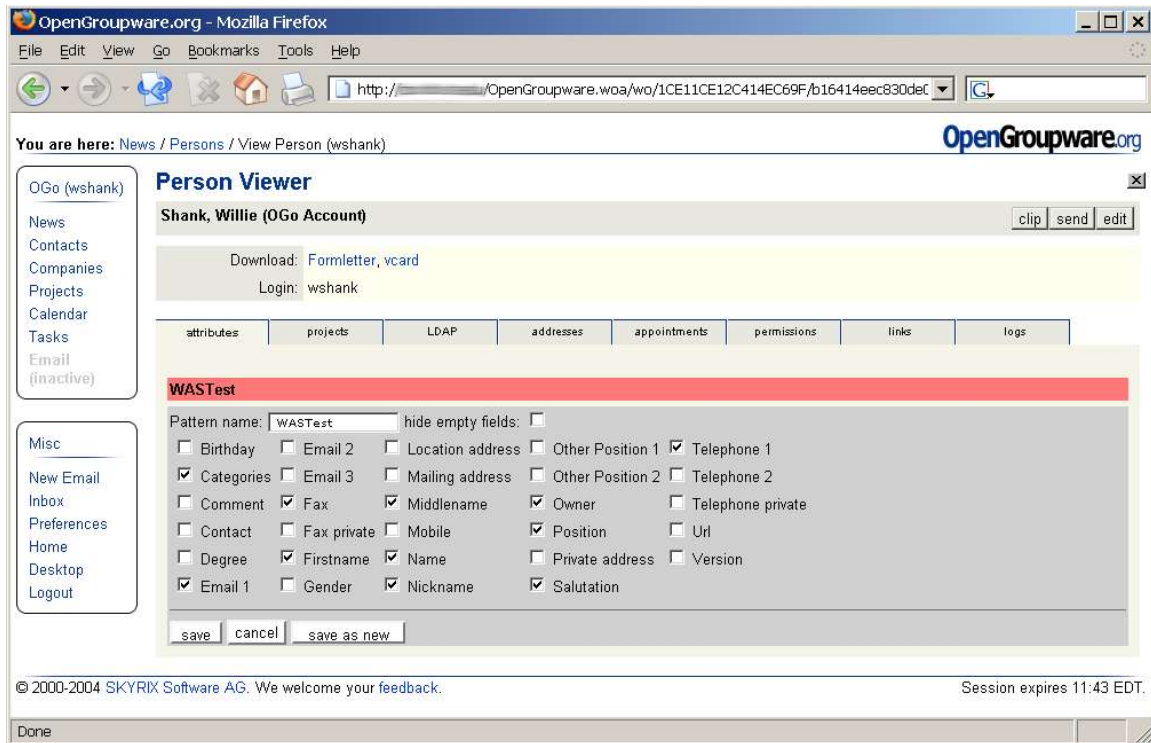


Figure 6 - Contact Attribute Configuration

To selectively display contact attributes, specify a “Pattern name” and select the desired attributes to be displayed. When attribute selection is complete, press the **save** button to return to the values view. To configure multiple views to be displayed side-by-side, select the **configure** button, specify a new “Pattern name”, deselect and select the desired attributes and press the **save as new** button to return to the values view. To return to a single attribute display set, select the **configure** button for the attribute set that is to be removed and press the **delete** button to return to the values view.

How do I add an appointment for a contact?

To add an appointment for (not necessarily with) a contact, open the “Person Viewer” window for the person. Select the “appointments” tab and press the **new** button to open the “Appointment Editor” screen. Specify relevant details of the appointment and press the **save** button at the bottom of the “Appointment Editor” screen to save the appointment.

Characteristics of the appointment editor are explained in more detail in the section of this document titled “Calendar” on page 42.

How do I assign a contact to a project?

To add a project for a contact, open the “Person Viewer” window for the person. Select the “projects” tab and press the **new** button to open the “Assign Projects” screen. Enter some part of the project name and press the **search** button to find projects that match the

specified criteria. Select the appropriate project(s) and press the **save** button at the bottom of the “Assign Projects” screen to save the assignment.

Projects are explained in greater detail in the section of this document titled “Projects” on page 17.

How do I delete a contact?

To delete a contact, locate and display the contact in the “Person Viewer” as described in the section of this document entitled “How do I search for a contact?”. Select the **edit** button labeled “1” in Figure 5 - Person Viewer Screen on page 9. The “Person Editor” screen will be displayed. At the bottom of the “Person Editor” screen, press the **delete** button and confirm deletion of the contact record when prompted.

What is the “Logs” tab?

The “logs” tab of the “Person Viewer” screen contains an audit trail of actions taken on the person record. The first record reflects the creation of the record in the database and subsequent records detail actions taken on the record to change the information it contains.

Companies

To begin working with company information, select the “Companies” link from the OGo dock area. The “Lookup Companies” screen, shown in the following figure, displays existing company information and allows for creation of new entries through manual entry or by import from selected external data sources.

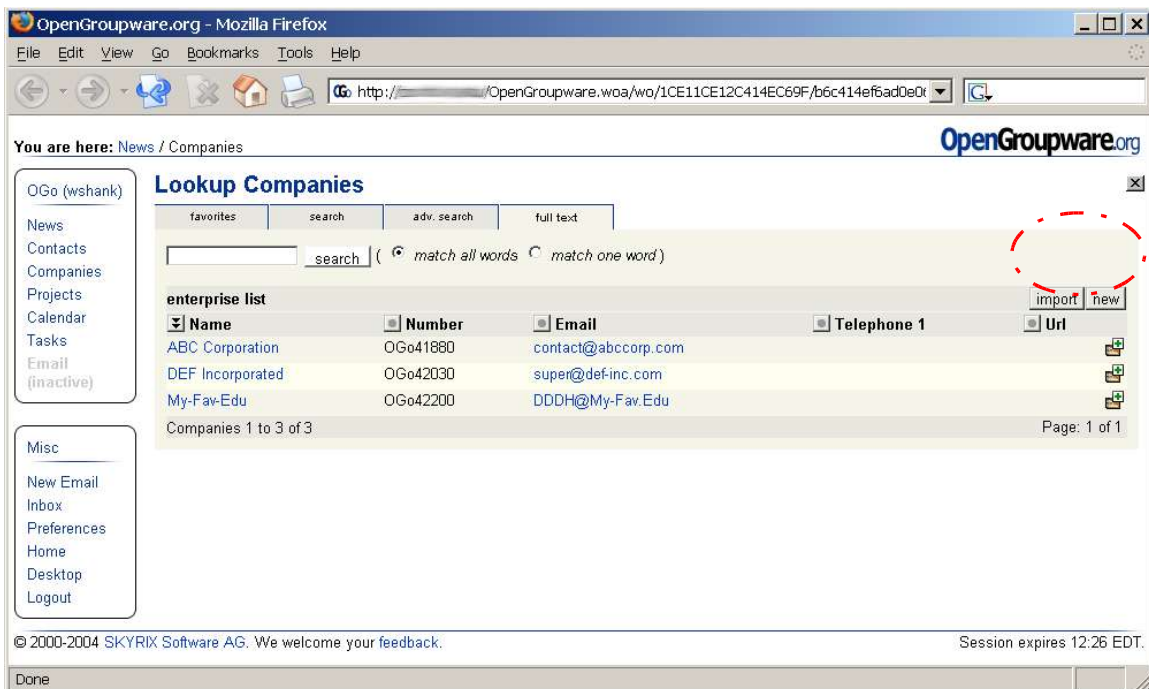


Figure 7 - Search Companies Screen

How do I add a company?

Each user can add company information to OGo by manually entering the relevant data or by importing data from a supported external source. See Appendix A – Supported Sources of Contact/Company Import Data on page 68 for a list of supported external data sources.

Manual data entry is accomplished by selecting the **new** button near the right side of the screen. The “Company Editor” screen is opened as shown in Figure 8.

The screenshot shows the 'Company Editor' form in Mozilla Firefox. The browser title is 'OpenGroupware.org - Mozilla Firefox'. The address bar shows the URL: <http://.../OpenGroupware.woa/wo/1CE11CE12E414F0CFF/b72414fd0e0e>. The page content includes a breadcrumb trail: 'You are here: News / Companies / Edit Company (Enterprise)'. The main form is titled 'Company Editor' and has a sidebar with navigation links: 'OGGo (wshank)', 'News', 'Contacts', 'Companies', 'Projects', 'Calendar', 'Tasks', 'Email (inactive)', 'Misc', 'New Email', 'Inbox', 'Preferences', 'Home', 'Desktop', 'Logout'. The form sections are: 'Common' (Name, Number, Url: http://, Email, Bank, Bankcode, Account), 'Telephones', 'Addresses', 'Extended', 'Categories', 'Comment', 'Contact', and 'Private / Readonly'. At the bottom of the form are 'save' and 'cancel' buttons. The footer contains: '© 2000-2004 SKYRIX Software AG. We welcome your feedback.' and 'Session expires 14:06 EDT.' The status bar shows 'Done'.

Figure 8 - Add New Company (Manual)

There are eight sections in this form, each containing numerous, optional data elements to describe the company. Clicking on any of the ▾’s will expand the selected section to display the fields that are available. Security for the company information is specified in the “Private / Readonly” section. The difference between a company that is “Private” and one that is “create with access limited to me” is that the limited access will allow the company to be linked to a contact definition; private will not. Both settings cause the entry to be invisible to other OGo users.

To import contact data from an external program, you must first export the data to a file using a supported external program. When a suitable contact file is available, you may select the **import** button to open the “Import companies” screen, shown in Figure 9.

A “file” and “file format” specification is required. Select the **upload** button to initiate import processing. The import of a comma/semi-colon delimited file begins by asking the

user to specify data element mappings by displaying a sample record. When mapping is complete, press the **import** button to copy company records from the data file into OGo.

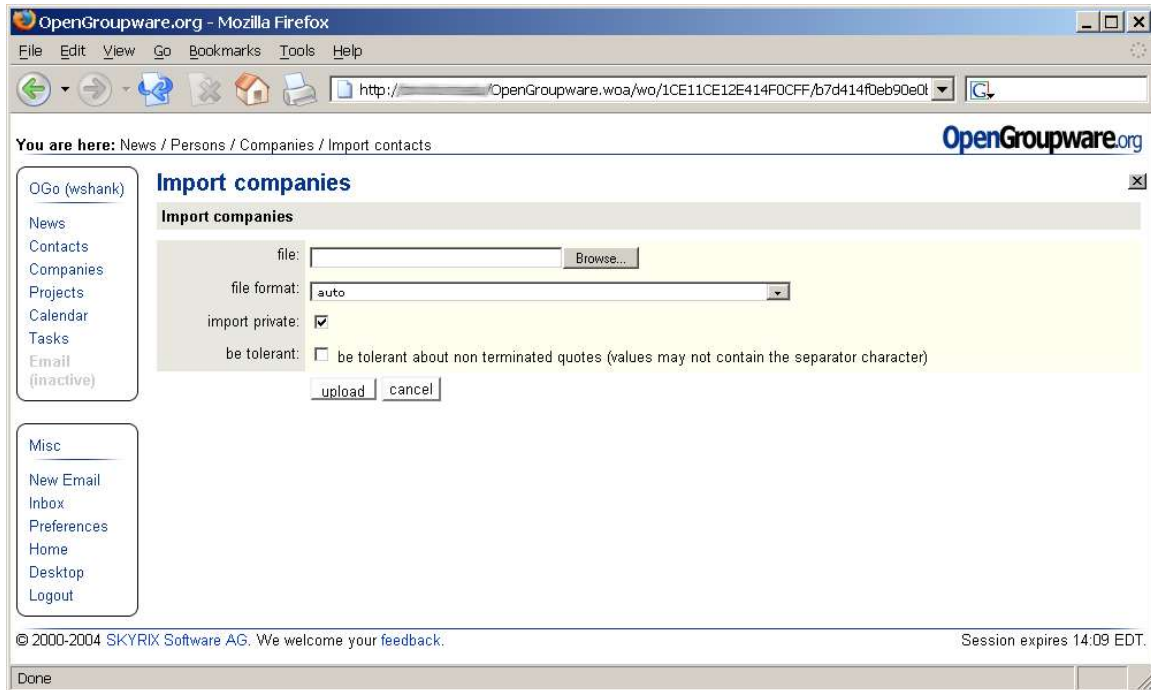




Figure 9 - Import Companies Screen

How do I search for a company?

In addition to the options for adding company information, the “Lookup Companies” screen (Figure 7) contains four tabs of options for searching company information. The tabs and the distinguishing features of each are as follows:

- favorites – This tab contains a list of those companies that you have previously designated as “favorite” or commonly used companies. A company is designated as a “favorite” as follows:

1. Search for companies using any of the additional search methods.
2. Click the  icon at the right-hand end of the company row.

To remove a company from “favorites”, display the favorites list and click the  icon at the right-hand end of the contact row.

- search – Enter any part of a company name and press the **search** button. A list of companies, which contain the specified characters in the company name field, will be displayed. Click on any company record to display the “Company Viewer” screen with additional company information. If only one company record matches the specified character string the “Company Viewer” screen will be presented instead of a list. The “Company Viewer” screen will contain the company information for the matching record.

- advanced search – Similar to the search tab described above except that many, commonly used, fields in the company record database can be searched for matching information. Complex searches can be accomplished by entering data in multiple fields. After specifying the desired information, press the **search** button to execute the query and display either a list of company names if multiple matching records are available, or the “Company Viewer” screen if there exists only one matching record in the database.
- full text – Like the “search” tab except that multiple strings separated by a space, may be entered as a search string. There are options to “match all words” and to “match one word”. As in the “search” tab, only the company name field is searched for matching characters.

How do I update a company?

The first step to update an existing company is to retrieve and display the company record. Retrieval of the company record can be accomplished through one of the search methods described in the section entitled “How do I search for a company?” on page 13. After locating the contact record, display the “Company Viewer” screen by clicking on the company name. The “Company Viewer” screen contains two sections, each with an **edit** button, as seen in the following figure. There are actually **edit** buttons on four of the tabs contained on the “Company Viewer” screen.

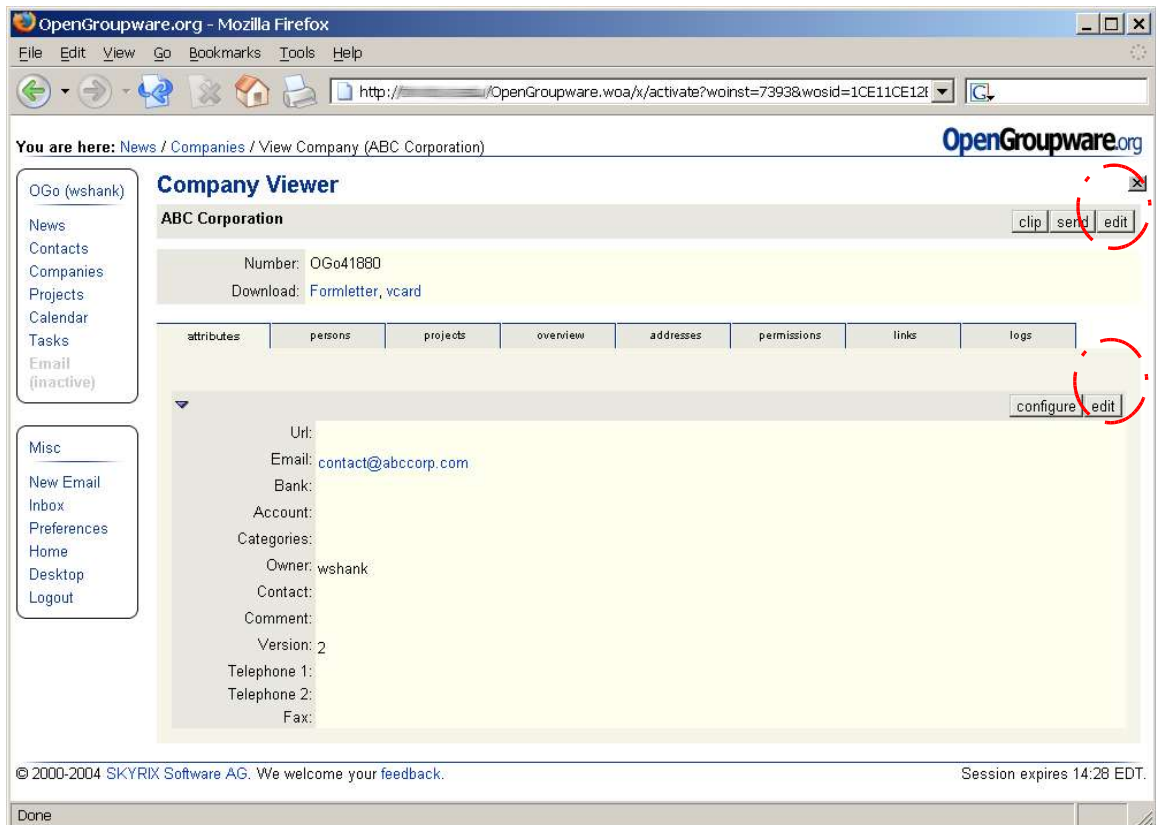


Figure 10 - Company Viewer Screen

The **edit** button labeled “1” in Figure 10 allows the user to update information such as company name, multiple telephone numbers, multiple email addresses, multiple physical addresses, comments, and whether the contact record is “Private” or “Readonly”.

The **edit** button labeled “2” in Figure 10 appears on the tabs for “attributes”, “overview”, “addresses” and “permissions”. The type of company information that can be updated on each of the tabs is as follows:

- “attributes” – company name, web site URL, telephone, etc.
- “overview” – an XML document that can contain any information you care to include.
- “addresses” – shipping and billing addresses.
- “permissions” – more granular security settings for the company record. Read or write access can be granted to company records by individual or by group.

How do I configure display of company information?

The user has the option of defining the company attributes that are displayed on the “attributes” tab of the “Company Viewer” screen. The **configure** button will display an attribute selection screen as seen in Figure 6.

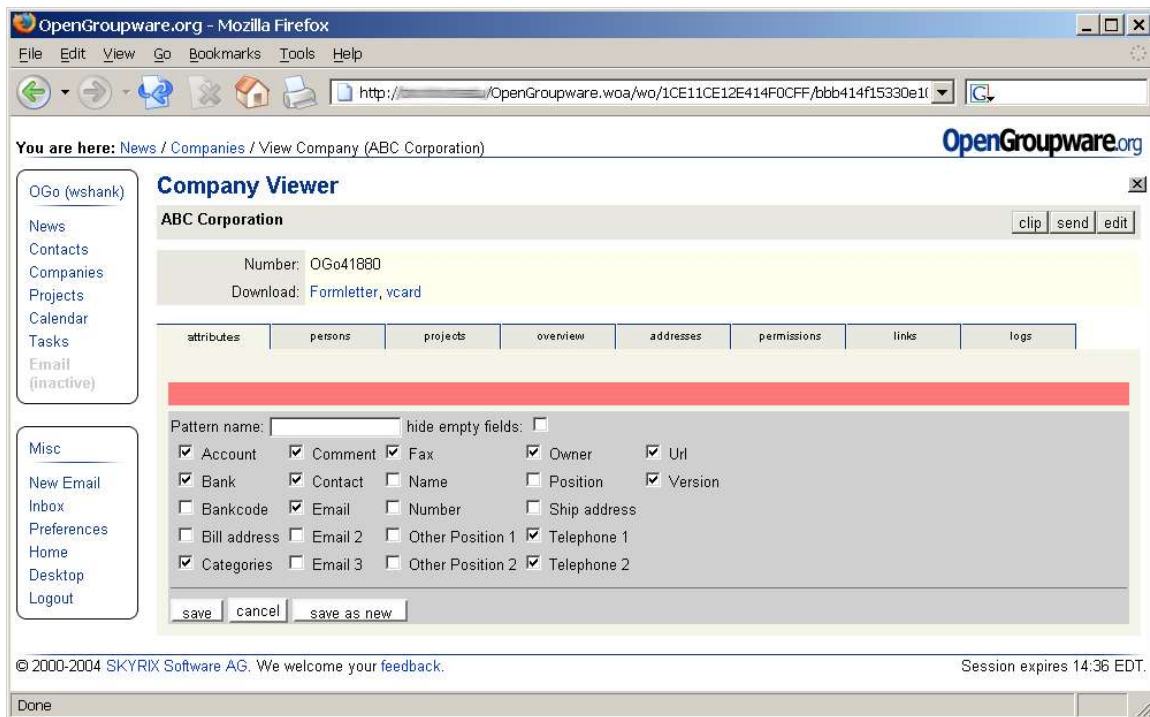


Figure 11 - Company Attribute Configuration

To selectively display company attributes, specify a “Pattern name” and select the desired attributes to be displayed. When attribute selection is complete, press the **save** button to return to the values view. To configure multiple views to be displayed side-by-side, select

the **configure** button, specify a new “Pattern name”, deselect and select the desired attributes and press the **save as new** button to return to the values view. To return to a single attribute set display, select the **configure** button for the display that is to be removed and press the **delete** button to return to the values view.

How do I link a person and company

To link the company with a person contained in the database, select the “persons” tab. Click on the **assign person** button to open the “Person Assignment” screen. On the “Person Assignment” screen, enter some portion of a person’s name and press the **search** button. Matching person names will be displayed for selection as shown in Figure 12. Select the name(s) to be linked to the company and press the **save** button to complete the link.

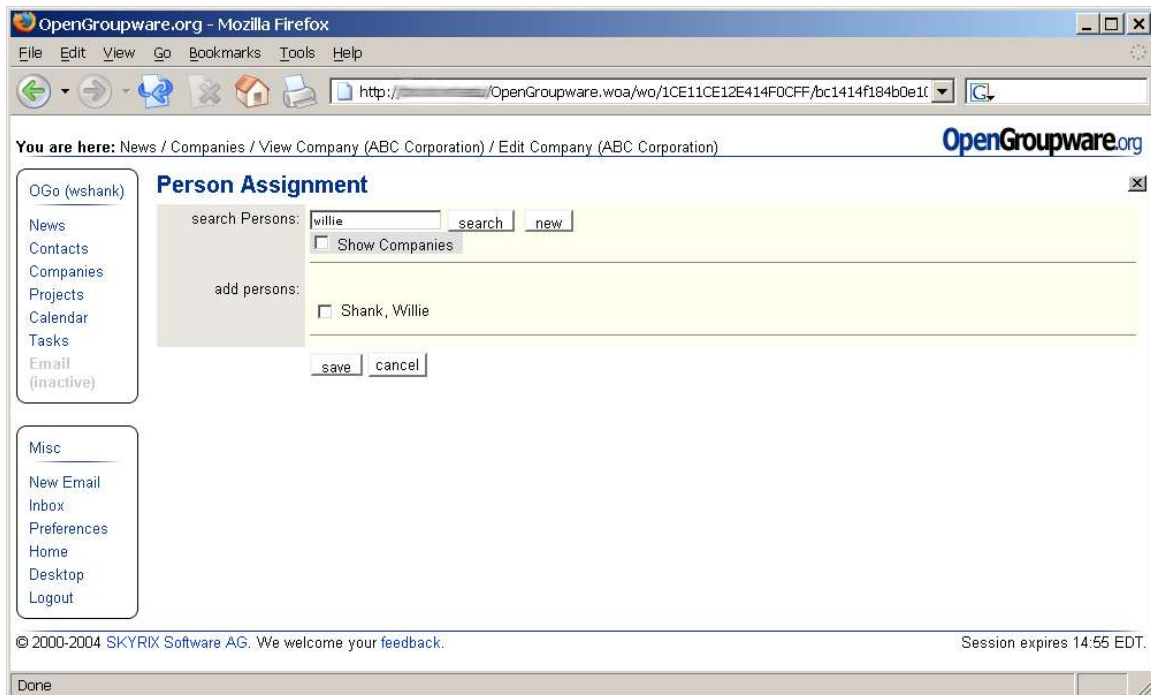


Figure 12 - Link Company/Person

How do I assign projects to the company?

Companies and projects may be linked in much the same way as companies to people. Select the “projects” tab, click on the **assign project** button, enter search criteria, press the **search** button, select the projects to be associated with the company and press the **save** button to complete the link.

Projects will be discussed in more detail in the section titled “Projects”.

How do I delete a company?

To delete a company record, locate and display the company in the “Company Viewer” as described in the section of this document entitled “How do I search for a company?”.

Select the **edit** button labeled “1” in Figure 10 - Company Viewer Screen on page 14. The “Company Editor” screen will be displayed. At the bottom of the “Company Editor” screen, press the **delete** button and confirm deletion of the company record when prompted.

What is the “Logs” tab?

The “logs” tab of the “Company Viewer” screen contains an audit trail of actions taken on the company record. The first record reflects the creation of the record in the database and subsequent records detail actions taken on the record to change the information it contains.

Projects

To begin working with project information, select the “Projects” link from the OGo dock area. The “Projects” screen, shown in the following figure, displays existing project information and allows for creation of new entries through manual entry of project data.

The screenshot shows the OpenGroupware.org interface in Mozilla Firefox. The browser window title is "OpenGroupware.org - Mozilla Firefox". The address bar shows the URL "http://OpenGroupware.woa/wo/1CE11CE12F414F1D06/c00414f22590e4c". The page content includes a navigation menu on the left with items like "OGGo (wshank)", "News", "Contacts", "Companies", "Projects", "Calendar", "Tasks", "Email (inactive)", "Misc", "New Email", "Inbox", "Preferences", "Home", "Desktop", and "Logout". The main content area is titled "Projects" and has tabs for "favorites", "search", "documents", "common", "private", and "archived". Below the tabs is a table of projects:

Projectcode	Name	Startdate	Projectlead
LIMS	LIMS	2004-06-29	wshank
General	WAS - General Project	2004-09-15	wshank
WAS-Test	WAS-Test	2004-09-15	wshank

At the bottom of the table, it says "Projects: 1 to 3 of 3" and "Page: 1 of 1". A "new" button is circled in red. The footer of the page contains the text "© 2000-2004 SKYRIX Software AG. We welcome your feedback." and "Session expires 15:33 EDT.".

Figure 13 - Projects Screen

How do I add a project?

Manual data entry is accomplished by selecting the **new** button near the right side of the screen. The “Project Editor” screen is opened as shown in Figure 14.

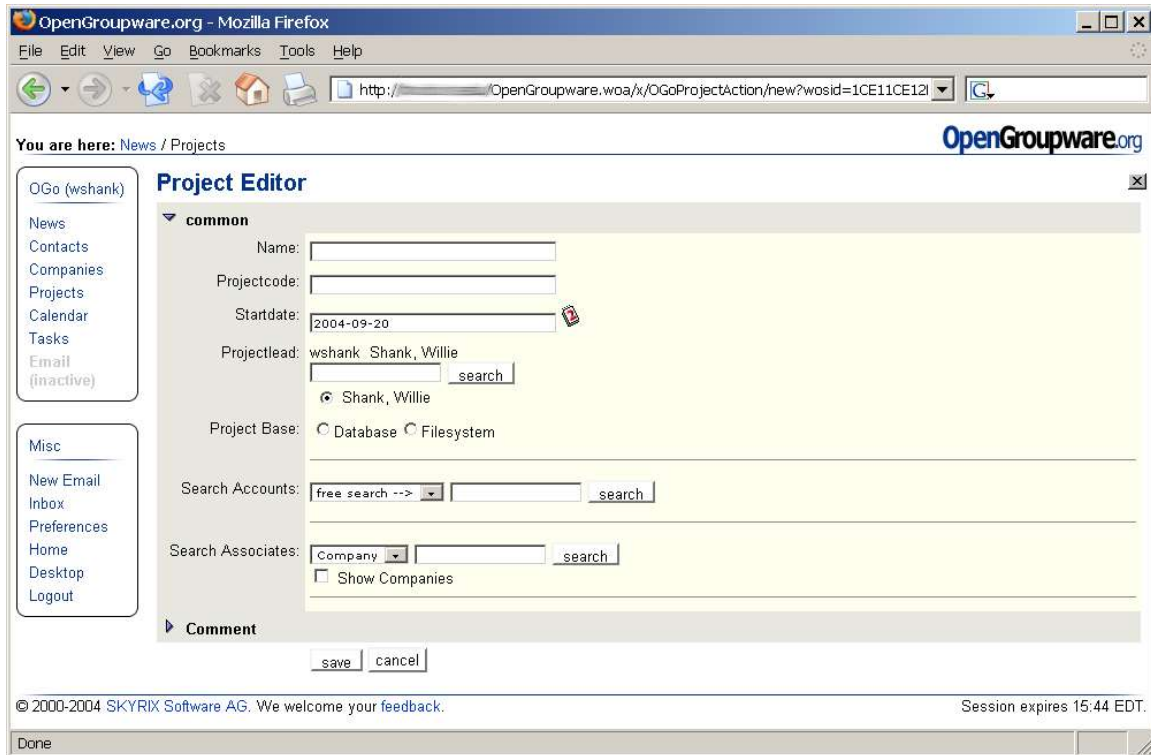





Figure 14 - Add New Project


There are two sections in this form, with several optional data elements to describe the project. Clicking on either of the 's will expand the selected section to display the fields that are available. The “Name” and “Projectcode” fields are the primary project identifiers – they should always be completed with relevant, descriptive information. The “Project Base” section tells OGo whether to store information about the project in the database, or within the filesystem. The “Search Accounts” section is used to grant individuals or groups of people access to the project. See Appendix B – Access Permission Values for a description of the security options. The “Search Associates” section is used to specify people who are points-of-contact for the project – separate and distinct from the list of people who have access to the project.

What are the tabbed options for projects?

In addition to the option to add a new project, the “Projects” screen (Figure 13) contains six tabs of options for searching project information or adding data to the project. The tabs and the distinguishing features of each are as follows:

- favorites – This tab contains a list of those projects that you have previously designated as “favorite” or commonly used. A project is designated as a “favorite” as follows:
 1. Search for a project as described in the next bullet.
 2. Click the  icon at the right-hand end of the project row.

To remove a project from “favorites”, display the favorites list and click the  icon at the right-hand end of the project row.

- search – Enter any part of a project name or projectcode and press the **search** button. A list of projects, which contain the specified characters in either the project name or projectcode fields, will be displayed. Click on any project record to display a screen with additional project information.
- documents – Enter any part of a document name, filename and/or file extension and press the **search** button to search all projects for files that match the specified criteria. Both your “private” projects and any projects that have been designated “common” are searched for matching files. The list of projects that contain matching files is displayed in the “Projects” section, near the middle of the screen shown in Figure 15. Select the  icon to expand a project and display the list of matching filenames. Clicking on the link for any document will open the file in its native application (assuming that application is available on the user’s desktop computer). **Warning:** *Edits to a file, opened in an application external to OGo, that are subsequently “saved” are not stored on the OGo server. The open file is a copy of the document, stored in a temporary location on the user’s desktop computer. It is possible to retain the document updates by choosing a “save as” location, but in general, editing the document directly from the OGo link is not a good idea.*

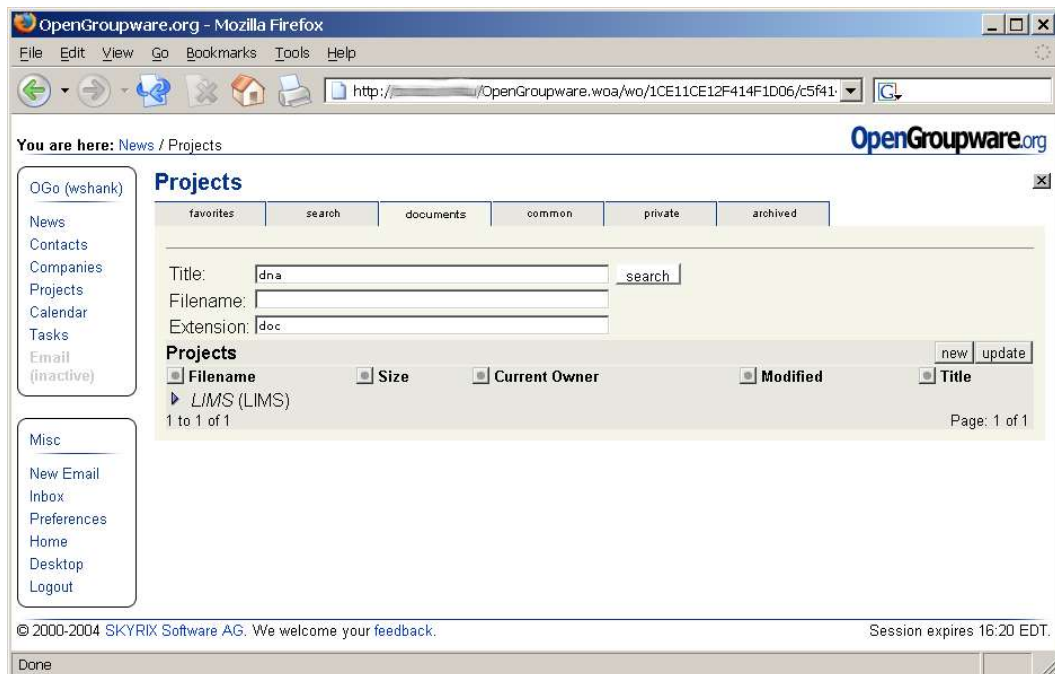


Figure 15 - Project Documents Tab

- common – contains a list of all projects that have been designated as “common”. Project permission settings determine whether a specific user may access the project, but all “common” projects have been assigned at least one account with access permission or an associate for the project.
- private – contains a list of all projects, created by the user, that are not “common”. These are projects that have not been assigned at least one account with access permission or an associate for the project.

- archived – contains a list of all projects, created by the user, that the user has chosen to archive. Project archival is available from the “attributes” tab when editing a specific project. Enter **Search** mode and press the **Archive** button near the bottom of the page.

How do I view project information

To display details of a specific project, first open the project list. Select “Projects” from the dock area at the left side of the OGo window. Click on the “search” tab to search for a project, or click on the “common”, “private” or “archived” tab to select a project from the respective category. Click on any project “Name” to display detailed information about the project. The project screen contains six tabs, as follows:

- attributes – This tab contains project setup details as shown in the following figure.

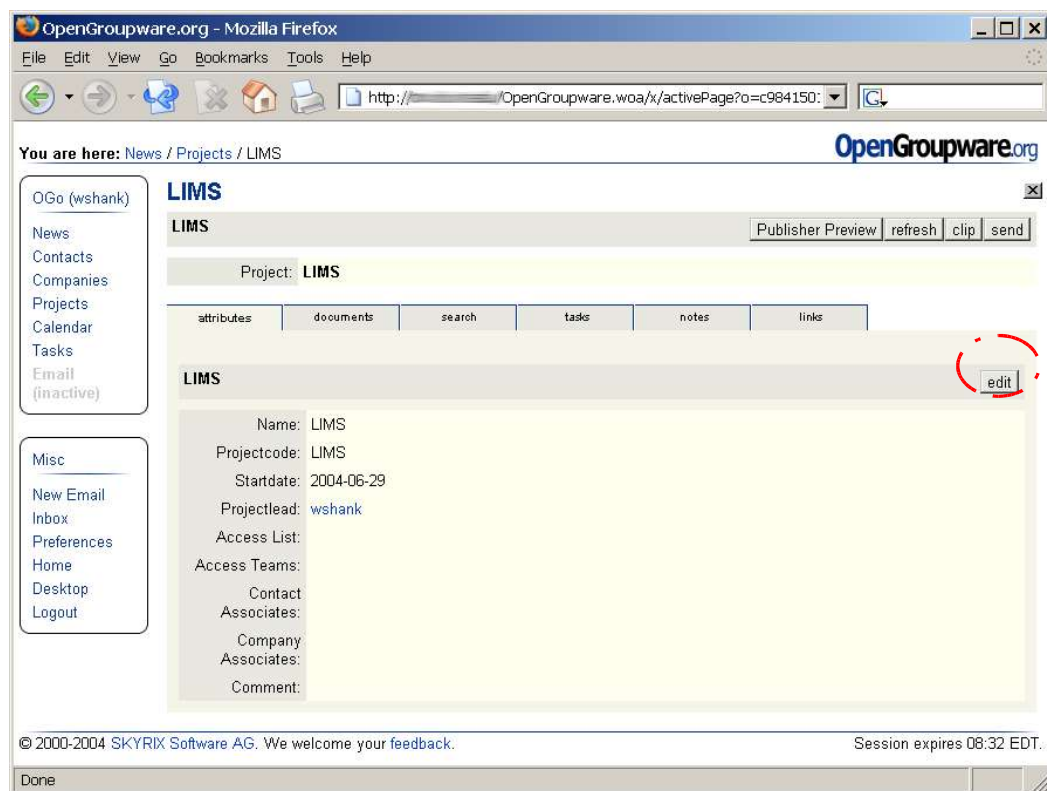


Figure 16 - Project Attributes

Project details may be added or updated by selecting the **edit** button. Specific details about project attributes may be found on page 17 of this document in the section titled “How do I add a project?”.

- documents – Contains a list of documents related to the project. Documents may be in any format. Documents may be files that are uploaded to the server or links to documents that reside anywhere on a shared file system or the internet. Additional discussion of the documents tab and adding documents to a project is presented in the next section entitled “How do I add documents to a project?”.

- search – Enter any part of a document name, filename and/or file extension and press the **Search** button to search for files that match the specified criteria. Click on the link for any document to open the file in its native application (assuming an appropriate application is available on the user’s desktop computer).
- tasks – contains a list of all tasks that have been defined for the project. Tasks can be defined for any project activity, meeting or milestone. Think of tasks as your project schedule. Additional discussion of the tasks tab and creating tasks for a project is presented in a later section entitled “How do I add tasks to a project?”.
- notes – contains a list of notes that the user has chosen to record for the project. Additional discussion of the notes tab is presented in the section entitled “How do I add notes to a project?”.
- links – contains a list of links that the user has chosen to create for the project. Links are hypertext references to external sources of information.

How do I add documents to a project?

The “documents” tab of any project screen is used to perform file-related activities. On this tab, you can view existing documents and link or create new HTML or text documents for the project. You can create, rename and delete directories/folders and files. And, finally, the “documents” tab has the capability to perform some limited configuration management for the project – to prevent multiple people from updating a document at the same time.

In the following sections, we’ll look at each of these functions in turn. A sample project “documents” tab is shown in “Figure 17 - Project Folders”.

Folder (directory) manipulation






The screenshot displays the OpenGroupware.org LIMS interface. The main content area shows the 'documents' tab for the 'LIMS' project. A navigation bar at the top includes 'attributes', 'documents', 'search', 'tasks', 'notes', and 'links'. Below this, there are icons for file operations and a table of documents. The table lists the following items:

Filename	Size	Current Owner	Modified	Title
Phase1		wshank	08:32:11	
Phase2		wshank	08:30:13	
Phase3		wshank	08:30:24	
DNA SeqSample Submission Form Fields.doc	22016	wshank	2004-08-17 12:22	DNA SeqSample Submission Form Fields
DNA_Seq_Subm_Form-Mar03-rev1.xls	24576	wshank	2004-08-17 12:23	DNA_Seq_Subm_Form-Mar03-rev1
GraphLogicSummary.doc	24064	wshank	2004-09-17 15:06	GraphLogic Demo Summary

The status bar at the bottom indicates 'Files: 1 to 6 of 6' and 'Page: 1 of 1'. The footer contains the copyright notice '© 2000-2004 SKYRIX Software AG. We welcome your feedback.' and the session expiration time 'Session expires 09:32 EDT.'

Figure 17 - Project Folders

Folder manipulation is accomplished in the circled section of the screen in Figure 17. A folder name may be entered in the text box in this section of the screen (where the “/” is located), followed by one of six icons/actions. The meaning of each of the icons is as follows:

-  – Change the current location to the folder specified in the location text box. Type a folder name into the location text box, after the “/” and click the change folder icon. This is equivalent to clicking on a folder name on the left-hand side of the tab screen.
-  – Rename the current folder to the name specified in the location text box. This action cannot be performed from the root folder of the project. You must first change to another folder by either of the methods described in the first bullet. Next, enter a new folder name in the location text box and click the rename folder icon to rename the folder. The new name will be displayed in the folder list at the left-hand side of the tab screen.
-  – Create a new folder. To create a new folder in the project root, type the folder name, after the “/” and click the create folder icon. To create a sub-folder, first select the parent folder by clicking on the appropriate icon from the folder list. Next, in the location text box, follow the pre-populated folder name with a “/” and the folder name you would like to add. Finally, click on the create folder icon to create the new folder.
-  – Delete the current folder. To delete a folder, either type the folder name in the location text box or click on the folder name in the folder list at the left-hand side of the tab. Next, click on the delete folder icon to move the folder from the folder list to the trash bin. Deleted items may be recovered from the trash until the trash has been emptied. Document/folder recovery is discussed in the section titled “File management and control” on page 29 (under the “move” bullet).
-  – Edit the permission settings for the current folder. To change access permissions, navigate to the folder by typing the folder name in the location text box or clicking on a name in the folder list and then click the edit permission icon to display the “Edit Access” screen shown in the following figure.

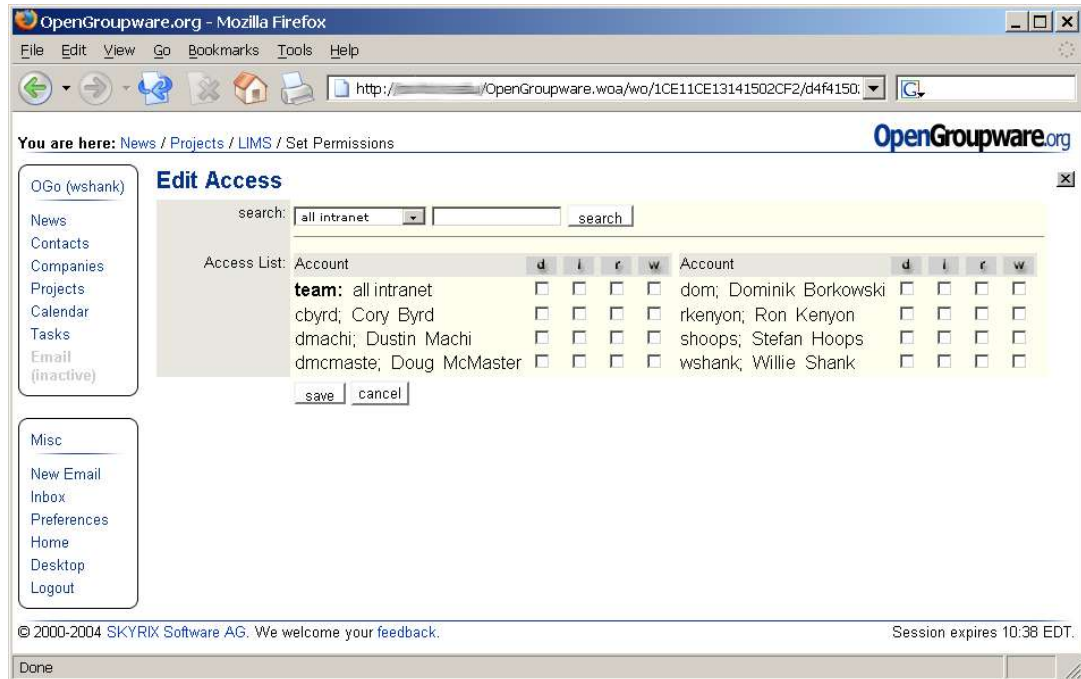


Figure 18 - Set Object Access

The “Access List” is displayed by selecting a value from the “search” list-of-values and/or entering search criteria into the available text box before pressing the **Search** button. For additional information on specific permission settings see “Appendix B – Access Permission Values” on page 70.

-  – Empty the trash bin.

File manipulation

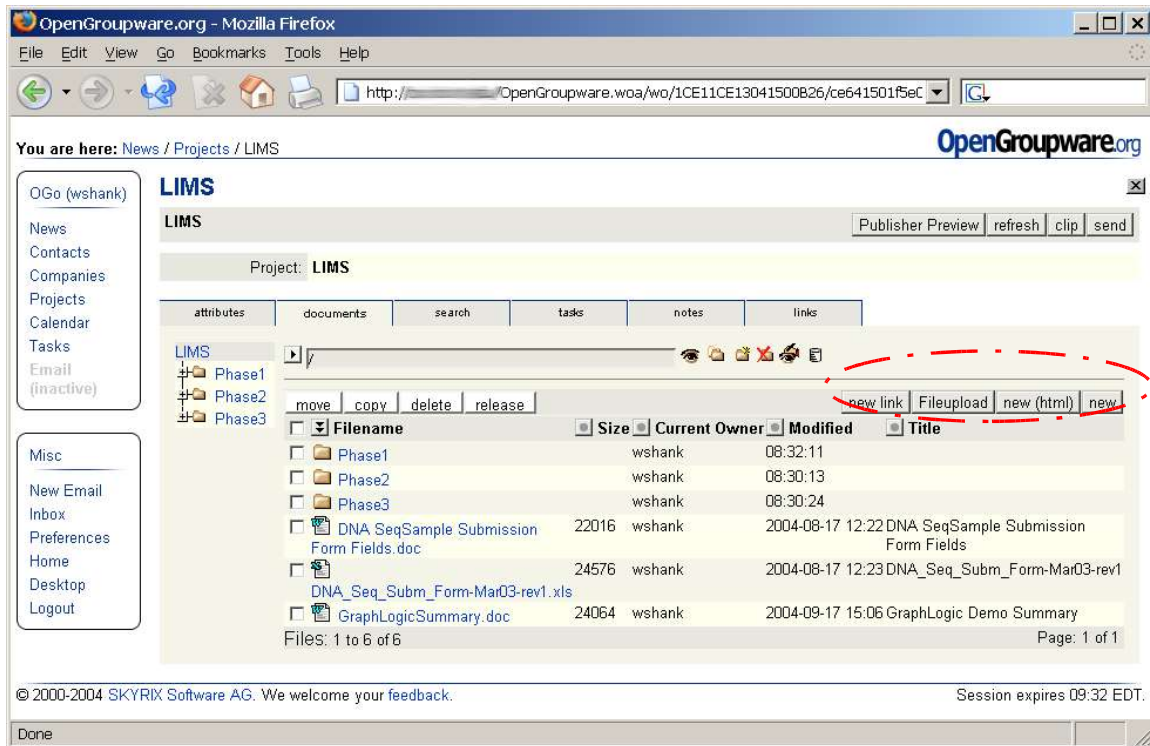



Figure 19 – Project Documents

Files/documents can be added to the project through the buttons in the circled section of the screen shown in Figure 19. There are four buttons available as follows:

- **new link** – Used to create a hyperlink to an external website or to another OGo object. The link is shown in the project documents list with a shortcut () icon. To visit the link, click on the link name. A new browser window will be opened containing the target data.

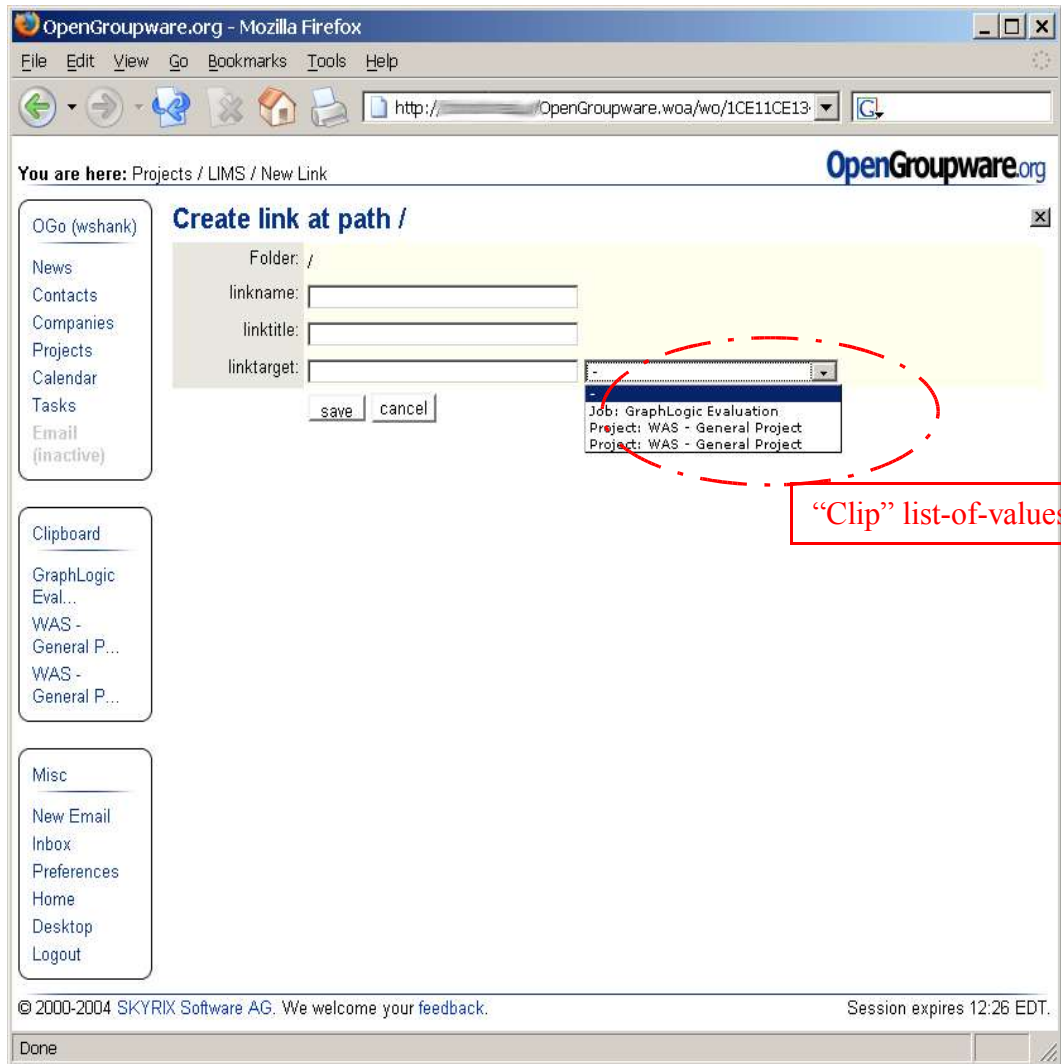


Figure 20 - New Project Link

Any descriptive information is allowed for “linkname” and “linktitle”. The “linktarget” must specify the target of the link that you want to include in your project. An external web site is specified in the form of a valid universal resource locator (URL) such as “http://my.website.edu”.

Links may also refer to contacts, companies, calendar entries, tasks or another project within OGo. To create a link to another OGo object, navigate to the object and click the **clip** button in the upper-right quadrant of the object screen. Then return to the “documents” tab of the project you are creating and click the **new link** button. In the “Create link at path” screen, choose the link you copied from the list-of-values, enter appropriate values for your link name and title and select the **save** button.

- **Fileupload** – Used to upload a document from the user’s computer to the OGo server in the specified location within a project folder.

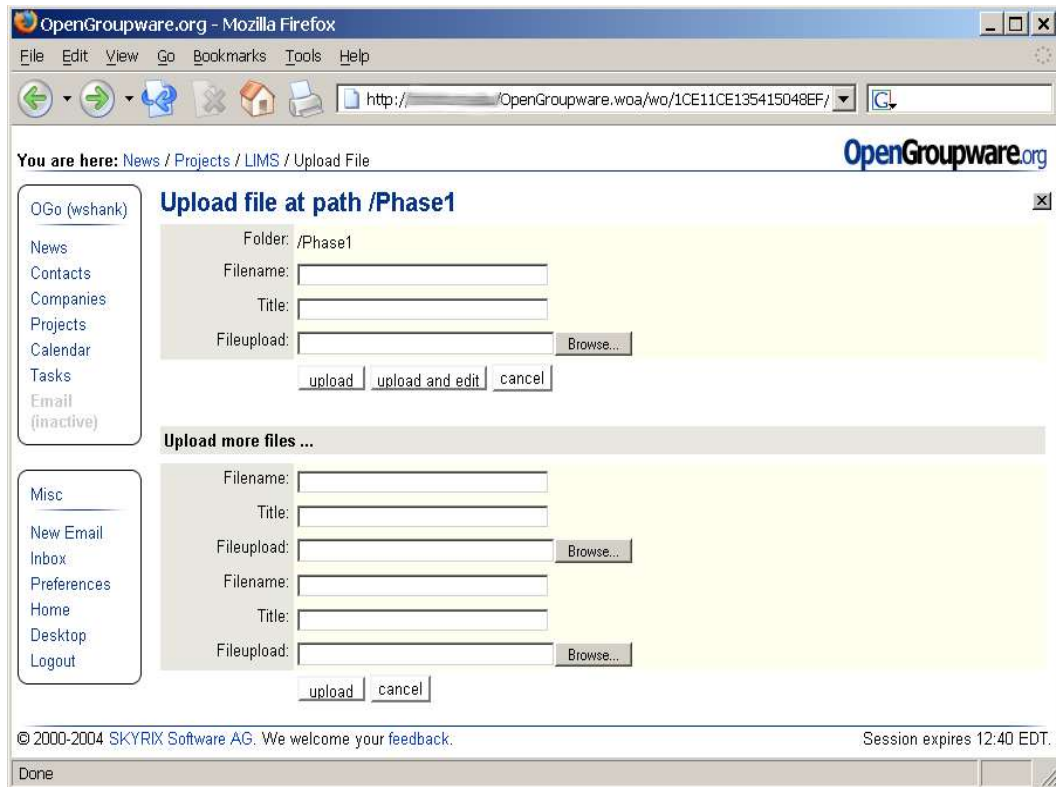


Figure 21 - Project Document Upload

To upload a file, first navigate to the folder that you want to contain the uploaded document and then click on the **Fileupload** button to display the file upload screen shown in Figure 21. From this screen, you can upload a maximum of three files at one time by completing all three sets of fields. The “Filename” field must contain the name of the document you are uploading, as you would like for it to appear in OGo (with an appropriate file extension). The “Title” may be any descriptive text and the “Fileupload” field must contain the path to the file on the local computer (typically, it’s easiest to “Browse” to the file and select it). When the required fields have been filled in, press the **upload** button to initiate processing. When the document copy has completed, OGo will return to the document list for the “current” folder (chosen as the first step in the upload process).

From the document list, you may click on any link name to visit the document details screen. From the document details screen, you may select versions of the document, download the document from the server to your desktop computer, open the document in an appropriate external application, set access permissions for the document and perform other document management functions. **Warning:** *Edits to a file, opened in an application external to OGo, that are subsequently “saved” are not stored on the OGo server. The open file is a copy of the document, stored in a temporary location on the user’s desktop computer. It is possible to retain the document updates by choosing a “save as” location, but in general, editing the document directly from the OGo link is not a good idea.*

New (html) – To create a new HTML file, first navigate to the folder that you want to contain the document and then click on the **New (html)** button to display the file upload screen shown in Figure 22. The “Filename” field must contain the name of the document you are creating, as you would like for it to appear in OGo (with an appropriate file extension). The “Title” may be any descriptive text. Type the content of the document into the “Texteditor” field. The size of the editor multi-line text area may be expanded/contracted, both horizontally and vertically, by clicking on the “+” and “-“ buttons at the bottom-right corner of the text area. When the desired text has been entered, you may validate the HTML/XML syntax. Press the **save** button to store the document. When the document has been saved, OGo will return to the document details screen for the new document.

From the document details screen, you may select versions of the document, download the document from the server to your desktop computer, open the document in an appropriate external application, set access permissions for the document and perform other document management functions.

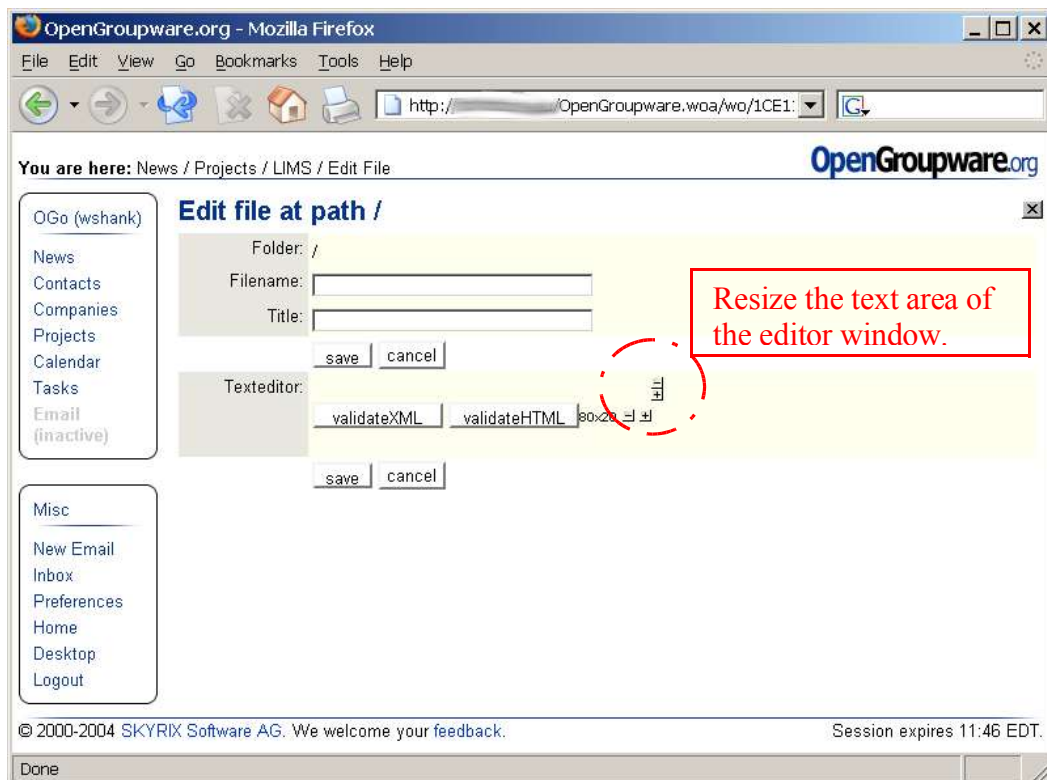


Figure 22 - Project New HTML Document

- **new** – Used to create a new text document by displaying a basic text editor within the OGo application.

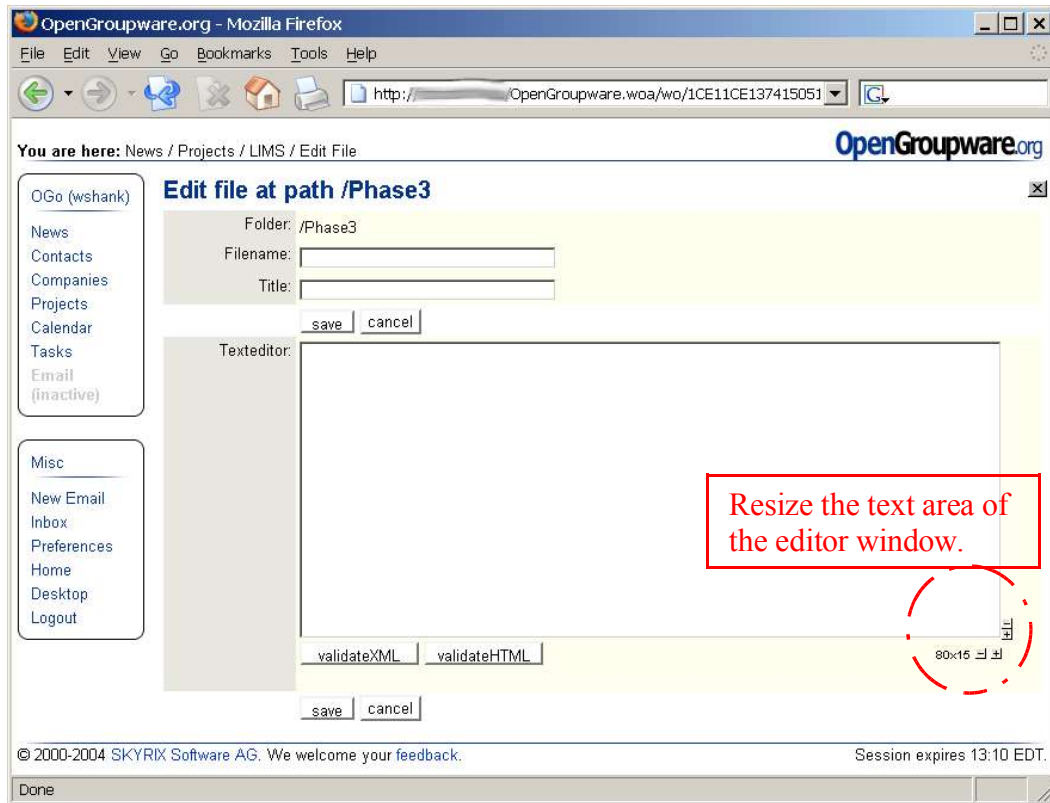


Figure 23 - New Project Text Document

To create a text document, first navigate to the folder that you want to contain the new document and click on the **new** button to display the file editor shown in Figure 23. The “Filename” field must contain the name of the document you are creating, as you would like for it to appear in OGo (with an appropriate file extension). The “Title” may be any descriptive text. Enter the body of the document in the “Texteditor” area and press the **save** button to save the file when complete. OGo will return to the document details screen for the new document.

From the document details screen, you may select versions of the document, download the document from the server to your desktop computer, open the document in an appropriate external application, set access permissions for the document and perform other document management functions.

File management and control

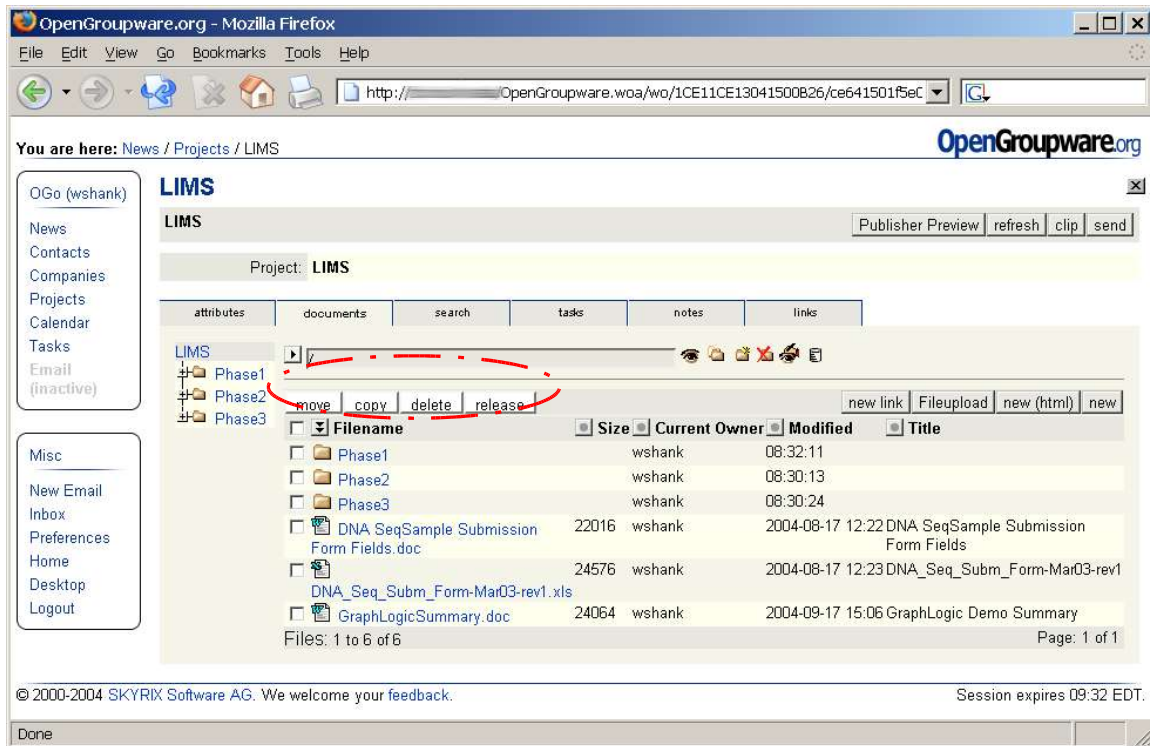


Figure 24 - Project Document Management/Control

File management controls are accomplished in the circled section of the screen shown in Figure 24. There are four buttons available to manipulate project documents as follows:

- **move** – Move a document from one folder to another. To move a document, select the checkbox to the left of the document icon and click on the **move** button. The “Move files from project [project name]” screen will be displayed as shown in Figure 25.

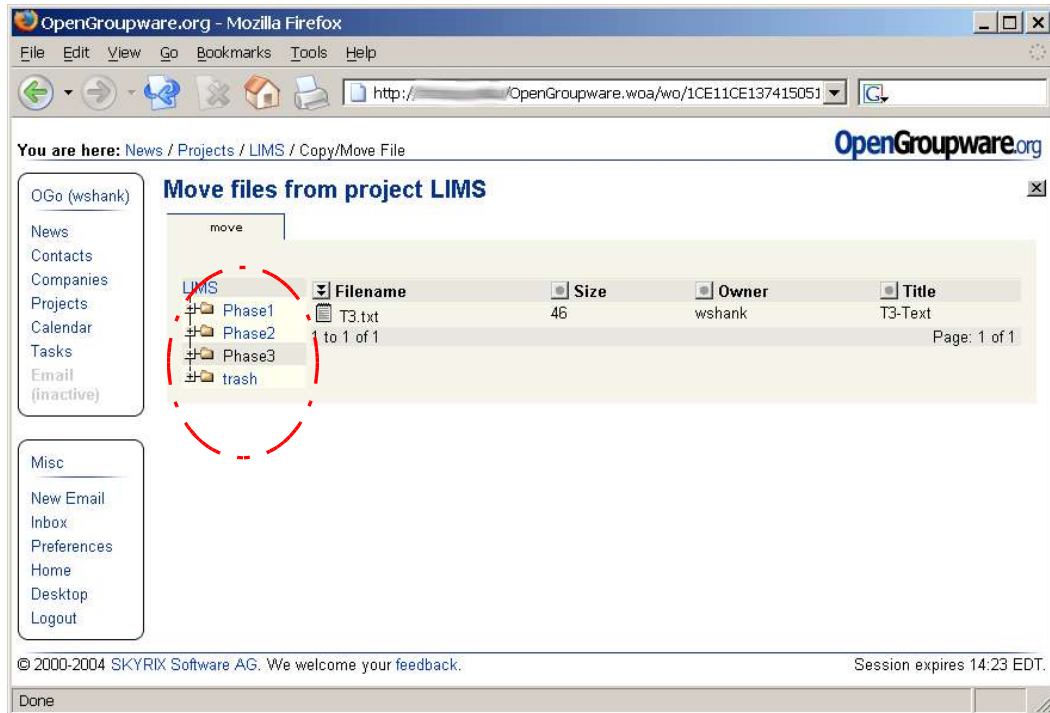


Figure 25 - Move Files

Select the destination folder from the list on the left side of the screen. OGo will move the file and display the selected (destination) folder and the list of documents that it contains.

The move function is used to recover a document from the trash/recycle bin. To recover a document, click on the “Trash” folder to display its contents. Select the document to be recovered, click on the `move` button and select the destination folder from the folder list.

- `copy` – Copy a document from one folder to another. Similar to the move function, to copy a document, select the checkbox to the left of the document icon, click the `copy` button and select the destination folder on the “Copy files from project [project name]” screen.
- `delete` – Delete a project document. To delete a project document, select the checkbox to the left of the document icon and click the `delete` button. OGo deletes the document and remains in the current folder document list. There is no confirmation for the delete function – so use caution. However, the document is available in the “trash” folder until the empty trash icon (🗑️) is clicked.
- `release` – Remove the lock from a document that prevents other users from updating the document and create a new version of the document. To remove the lock from a project document, select the checkbox to the left of the document icon and click the `release` button. OGo removes the document lock and remains in the current folder document list.

Additional file controls may be accessed on the screen for a specific project file. To access these controls, click on the hyperlink for the file. The OGo screen for that file will be displayed as shown in the following figure.

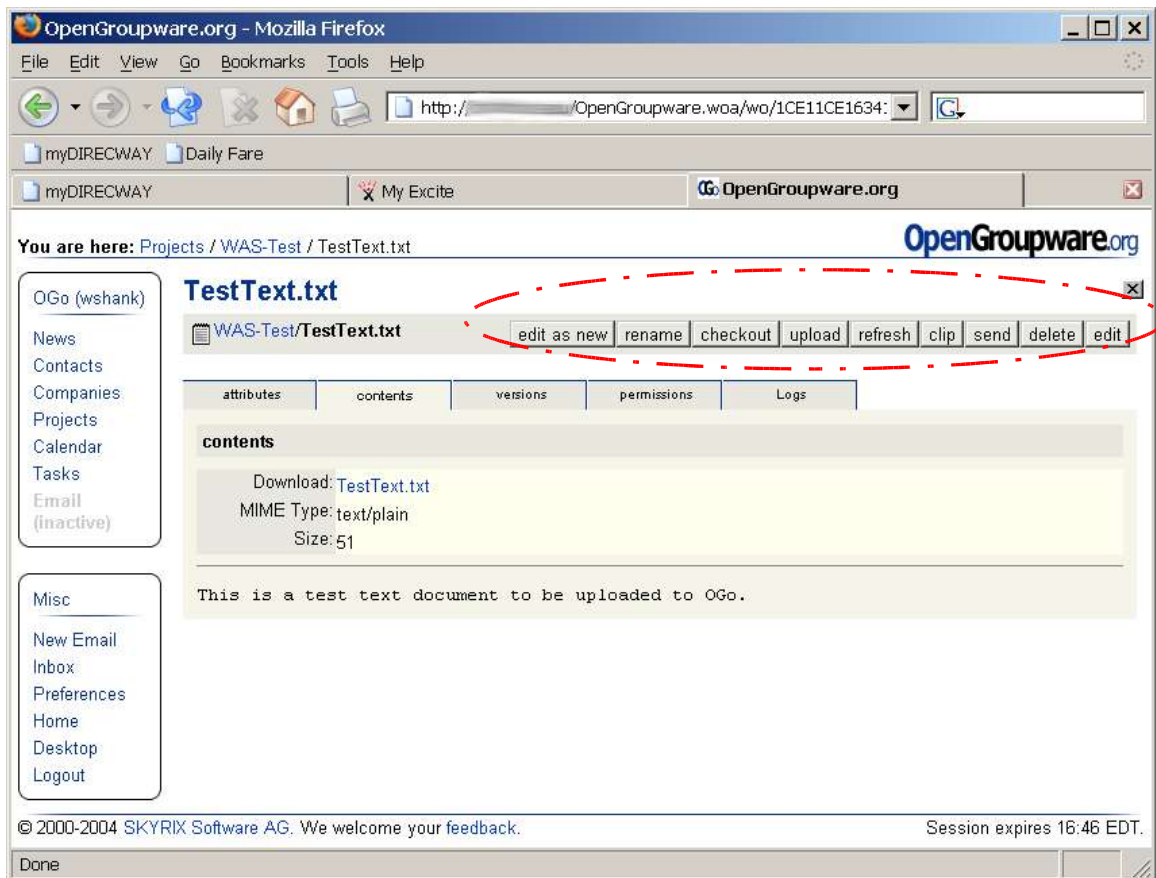


Figure 26 - Project File Details

The project file screen is home to five tabs of information about the file. The tabs and the information they contain are as follows:

- attributes – A container for optional information, such as an alternate title, that may be completed by the user by clicking on the “rename” button.
- contents – (shown in the preceding figure) contains information about the data file such as multipurpose internet mail extension (MIME) type and file size. This tab is used to download the file from the OGo server to the user workstation. File download is accomplished by clicking on the hyperlink filename. When prompted by browser software, select the option to save the file to disk. If the file automatically opens in it’s native application, you may select the “Save As” option from the application program.
- versions – A list of document versions. A version is created each time the file is checked out, downloaded and then, subsequently, uploaded into OGo and released.
- permissions – Lists the current access control settings for the file and allows (via the “edit” button on the tab) modifications to those settings.

- **logs** – Contains a history of actions for the file such as upload and download.

There are seven action buttons available to the user on the file details screen for all documents. There are an additional two options for plaintext files that were created in OGo or that have a “.txt” file extension. The complete list of options is as follows:

- **edit as new** – This option is only available for plaintext files. Copy the existing document content and opens the copied content for update. A new file name must be specified to save the new document. A new title may be specified if desired.
- **rename** – Change the file name of the selected file.
- **checkout** – This option is not available for plaintext files. Checkout the selected file. A file that is checked out may not be uploaded/checked-in by any other user until released by the owner of the lock. Checkout does not automatically initiate a file download.

When selected, this button is replaced by two buttons – **reject** and **release**. The **release** button removes the lock from the file and creates a new version of the document. The **reject** button removes the lock from the file but does not create a new version. As with **checkout**, **release** and **reject** are not available for plaintext files.

- **upload** – Specify the location on a local computer from which to copy a file to the OGo server. There are options to just “upload”, to “upload and release” or to “upload and edit” the file. Generally, to check a document back into the OGo application, the user would specify the file location and select the “upload and release” option.
- **refresh** – Refresh file details that may have changed by another user or application.
- **clip** – Copy a link to the file details screen, for the selected file, to the Clipboard so that it may be pasted as a link in another project.
- **send** – Send a link to the file details screen, for the selected file, to another user via email. This type of email may be processed either within an OGo screen or in the users default email client software (new window). This option is specified in the OGo "Preferences" (see the section entitled "Preferences" on page 55).
- **delete** – Delete the selected file from OGo.
- **edit** – This option is only available for plaintext files. Open the document content for update.

How do I add tasks to a project?

Tasks may be added to a project through the “tasks” tab on the project details screen or by specifying a project under the “Project” header while creating a new task from the “Tasks” link in the dock area.

From the project details screen, click on the “tasks” tab to display the current (not archived) tasks defined for the project. To add a new task, click on the **new** button at the top, right side of the task list. The “Task Editor” screen, shown in Figure 27, is displayed for entry of task details.

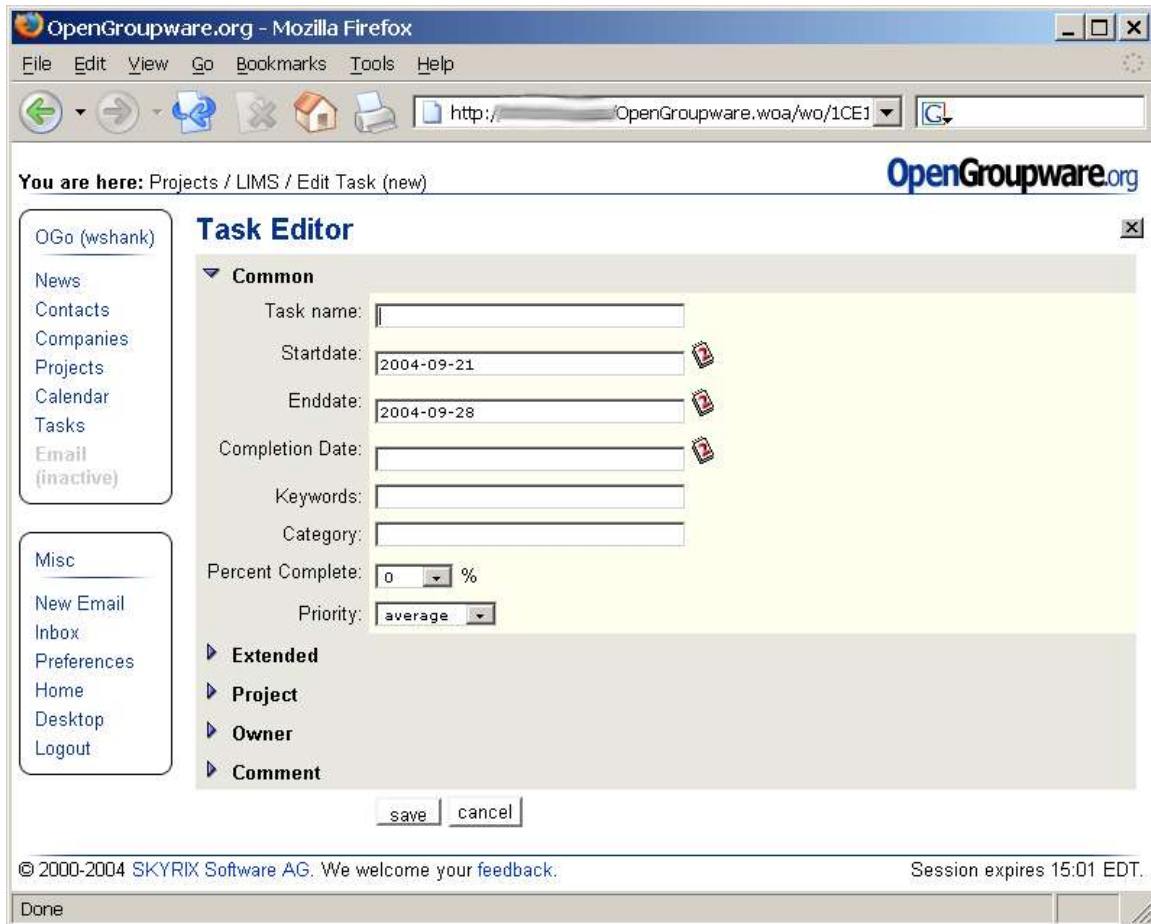




Figure 27 - Task Entry Screen

There are five sections on the “Task Editor” screen which allow the user to record details such as the name, start and end dates, percentage complete, priority, associated companies and contacts, work performed (actual and total) and project associations. Click on the blue  icon to the left of any section heading to expand the section. Date  values may be entered manually or by clicking on the calendar icon ().

Additional details for project tasks are provided in the section titled “Tasks” on page 34.

How do I add notes to a project?

Notes may be added to a project through the “notes” tab on the project details screen.

From the project details screen, click on the “notes” tab to display a list of notes defined for the project. To add a new note, click on the **new** button at the top, right side of the note list. The “Edit Note” screen is displayed for entry of a note title and text.

Additionally, you can click on the `togglecreate` button to open a quick-create area directly on the notes tab. After completing the title and note body fields, click on the `create` button to save the note. To return to “normal” view, click on the `togglecreate` button a second time.

How do I delete a project?

A project cannot be deleted if it has one or more active tasks or documents. An active project can, however, be archived (see “How do I archive a project?” – the next section) to remove it from active status. In order to actually delete the project, all active tasks and documents must be removed (deleted). After deleting dependent tasks and documents, the `delete` button will become available.

To delete a project, first navigate to the project that you would like to delete. Click on the “attributes” tab and click on the `edit` button below the tab selectors. Scroll to the bottom of the project editor screen and click on the `delete` button.

How do I archive a project?

When a project has been completed or cancelled, you may wish to archive it to remove the project and its dependent tasks, notes and documents from active status. To archive a project, first navigate to the project that you would like to archive. Click on the “attributes” tab and then the `edit` button below the tab selectors. Scroll to the bottom of the project editor screen and click on the `archive` button.

Tasks

Tasks fall into two categories – those that span a period of time, and those short- or no-duration events that are often called milestones. In OGo, both types of tasks are managed in the same way.

How do I add a task to a project?

Tasks may be added to any project from either the “Tasks” link in the OGo dock area, or from the “tasks” tab of the project you are working with. Except for navigation to the “Task Editor” screen, essential details of adding the task are the identical. The following discussion will assume that work begins from the main screen for a project.

From the project screen, click on the “tasks” tab and then the `new` button to display the “Task Editor” screen as shown in the following figure.

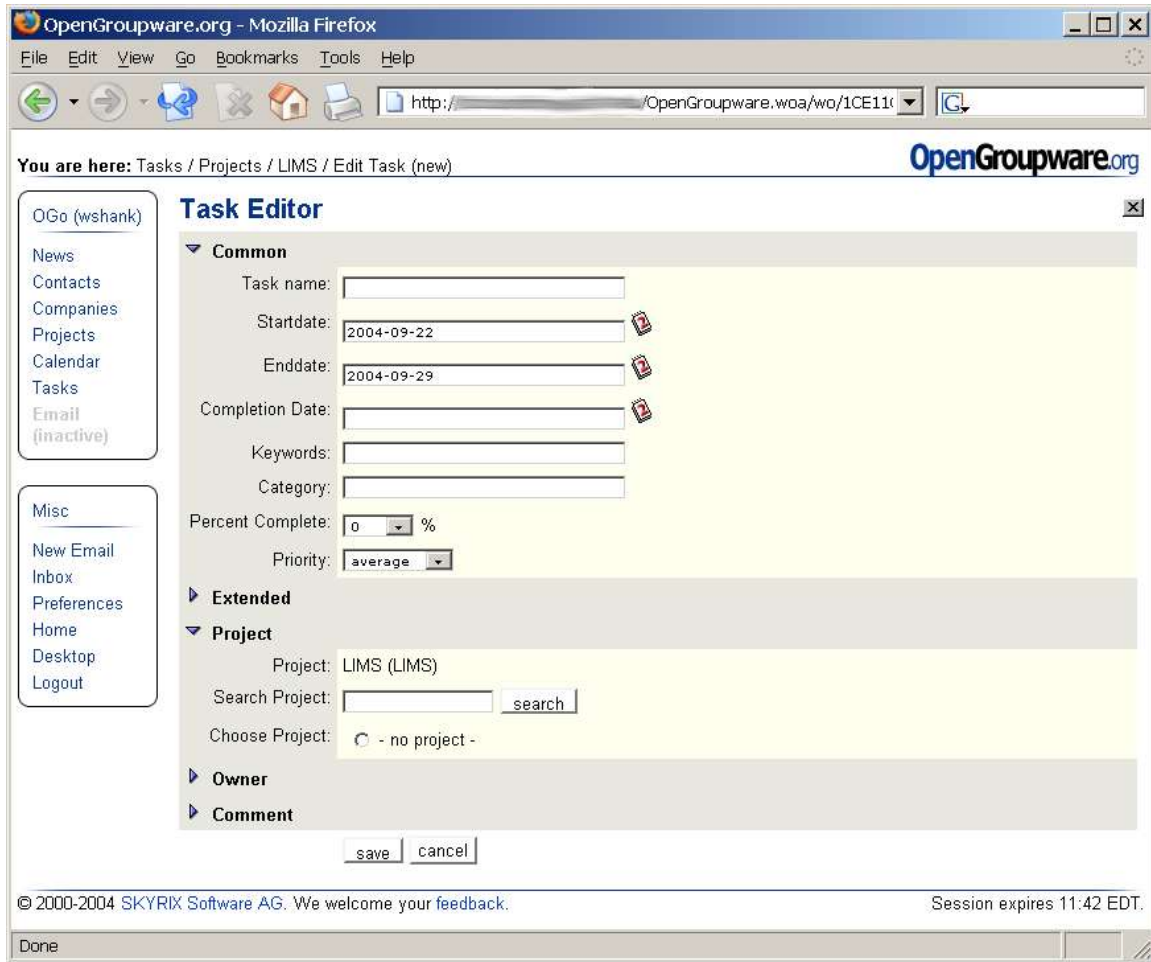




Figure 28 - Add Task

There are five sections on the “Task Editor” screen which allow the user to record details such as the name, start and end dates, percentage complete, priority, associated companies and contacts, work performed (actual and total) and project associations. Click on the blue  icon to the left of any section heading to expand the section. Date  values may be entered manually or by clicking on the calendar icon ().

“Task name” is a user-defined name for the task. The start and end date fields define the duration for the task. A fixed-duration task will have both dates; a milestone will have only a “Startdate”. The “Completion Date” is generally not entered at task creation. Data for this field will be added when the task has been completed. Keywords, or search terms, are used to help facilitate efficient searching of the database.

The “Extended” section of the screen contains fields to record contacts (people and companies) and work performed. Additionally, by selecting the appropriate option from the “Notify creator” list-of-values, you can be notified whenever the status of a delegated task changes. The values that may be chosen for notification are as follows:

- “Never” – no notification is provided
- “Always” – notification is provided each time status of the task changes

- “On accept/done” – notification is provided only when the delegated task owner accepts the task or indicates that it has been completed.

Notably, the “Project” section of the screen has been populated with a default “Project”. You may change the default by searching for an alternate or by selecting the “no project” option, but if no action is taken, this task will be assigned to the current project. The default project is the only apparent difference that you will encounter between entering the “Task Editor” from a project or from the OGo dock area “Tasks” link at the left side of the screen. When you enter from a project, you are provided with a default project; when you enter from the master task list, no default is available.

A task may be delegated to another OGo user by searching for and selecting the user in the “Owner” section of the form.

Selecting the “Tasks” link from the OGo dock area opens the main “Tasks” screen. This screen gives the user a great deal of flexibility to manage workload. An example screen is shown in the following figure.

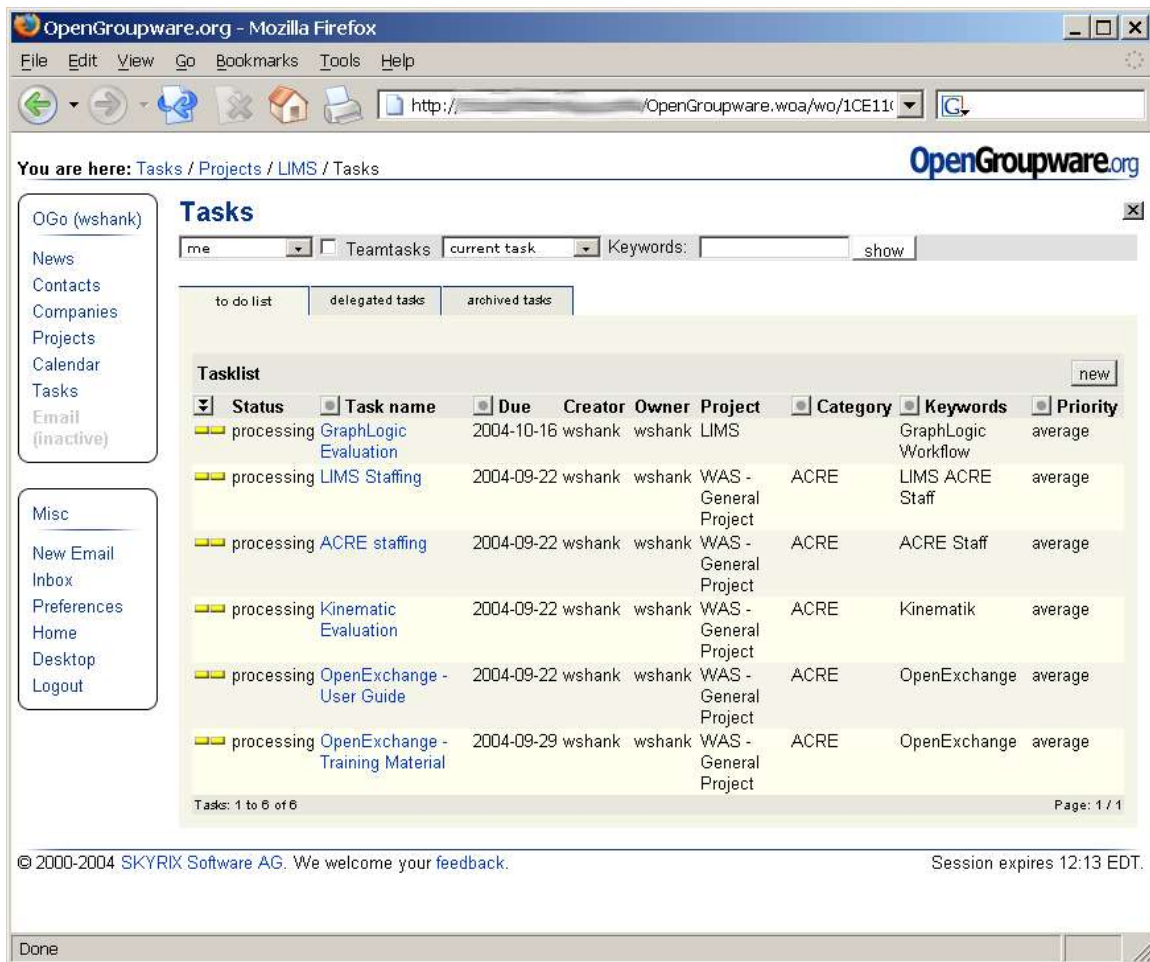


Figure 29 - Task Viewer

Near the top of the task viewer, there are three blocks that help determine what data is displayed in the task list.

The first block, populated with “me” in the example figure, causes the task list to display those tasks that the current (logged in) user is involved in. Any team/group defined in OGo may be selected for display.

The second block, populated with “current task” in the example figure, causes the task list to display tasks that are in-progress. An in-progress task is one where the begin date has passed, but the user has not yet indicated that it has been completed. The other available option for the list-of-values is “upcoming tasks”; those items where the begin date has not yet been reached.

The third block, blank in the example figure, includes search terms to restrict the task list. This option might be used if you wanted to find all users (“all intranet” option) who are currently working (“current task” option) on tasks for the XYZ Project (search term).

The task list is coded with colored dashes at the beginning of each task line. Green indicates completed tasks, yellow – in-progress tasks and gray – archived tasks.

There are three tabs on the “Tasks” screen that further subdivide content. The content of those tabs is as follows:

- to do list – In-progress tasks.
- delegated tasks – Tasks that you created but have delegated by changing the owner to another OGo user.
- archived tasks – Tasks that have been completed and archived.

How do I update a task?

To update any data that defines a task, you must first navigate to the “Task Viewer”. You may reach the viewer screen through the master task list (OGo “Tasks” link) or from the “tasks” tab for a specific project. In either case, the “Task Viewer” screen looks and functions in the same manner. A sample “Task Viewer” screen is shown in the following figure.

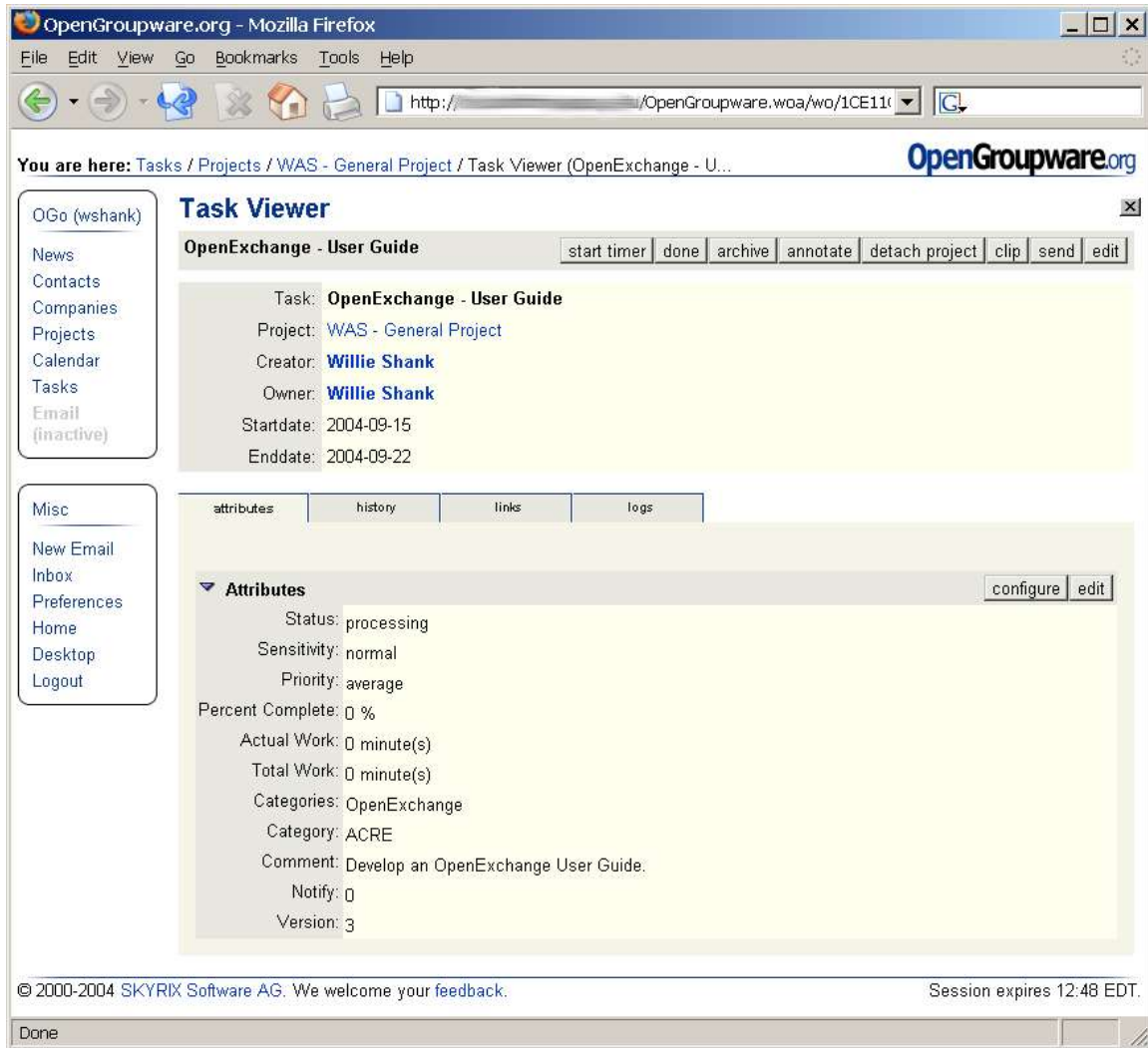


Figure 30 - Task Viewer

The top third of the screen contains essential details about the task and most task action buttons that may be used to update or work with task details. The action buttons for any task are as follows:

- **start timer** – Starts a “stopwatch” function to track the amount of time spent working on the task. One might start and stop the timer at the beginning and end of work on a task to automatically record the amount of time spent on the task during a specific session.
- **stop timer** – (replaces the **start timer** button when the timer is started) Stops the automatic stopwatch function.
- **clear timer** – (only appears when the timer is started/running) Stops the timer. *I expect this function is also supposed to clear either the actual or total time worked for the task, but that does not appear to be the case at present. Bug?*

- `done` – Indicates to OGo that the task has been completed. Sets the status indicators for the task to green. This action does **not** set the “completion date” for the task.
- `archive` – Displays a “Task Action” screen for entry of optional comments. After clicking on the `save` button, the task status is updated, the task is removed from the “to do list” and added to the “archived tasks” tab.
- `annotate` – Displays a “Task Action” screen for entry of comments. The annotation text can be viewed on the “history tab”
- `detach project` – Removes the project reference for the current task. The task will remain in the master task list, but will be removed from the task list of the specific project.
- `clip` – Creates a link for the task on the clipboard. The clipboard appears in the OGo task area on the left side of the browser window, just below the OGo task list. The clip function can be used to return quickly to a previous screen. It can also be used to hold a location to be used in a project document when the `new link` button is used. After using `clip` to record a location, select the memorized location in the “linktarget” list-of-values in the “Create link at path” dialog screen.
- `send` –Used to send a hyperlink to the current task via email.
- `edit` – Open the “Task Editor” screen to update task details.

Four selectable tabs display data about the task on the bottom two-thirds of the screen. The tabs and their content is as follows:

- `attributes` – Displays those task details that the user has chosen to display. The displayed details can be changed by selecting/deselecting values on the attributes configuration screen, accessed by clicking on the `configure` button.

To selectively display task attributes, specify a “Pattern name” and select the desired attributes to be displayed. When attribute selection is complete, press the `save` button to return to the values view. To configure multiple views to be displayed side-by-side, select the `configure` button, specify a new “Pattern name”, deselect and select the desired attributes and press the `save as new` button to return to the values view. To return to a single attribute set display, select the `configure` button for the display that is to be removed and press the `delete` button to return to the values view.
- `history` – Contains the history of changes to the task including the full text of comments that are entered through the `annotate` button as described previously and timer start/stop/clear actions.
- `links` – Contains a list of links to external data sources that relate to the task.
- `logs` – Contains a more abbreviated history of changes that occur to task data.

How do I respond to a delegated task?

When a task has been delegated to you, the task will be displayed in your “to do list” as either a current or upcoming task, depending on the start date assigned when the task was created. To open and view details of the task, click on the task name from the task list. The “Task Viewer” screen will be displayed with two buttons that are not displayed on the “Task Viewer” for tasks that you own. A sample screen for a task that has been delegated to you is shown in the following figure.

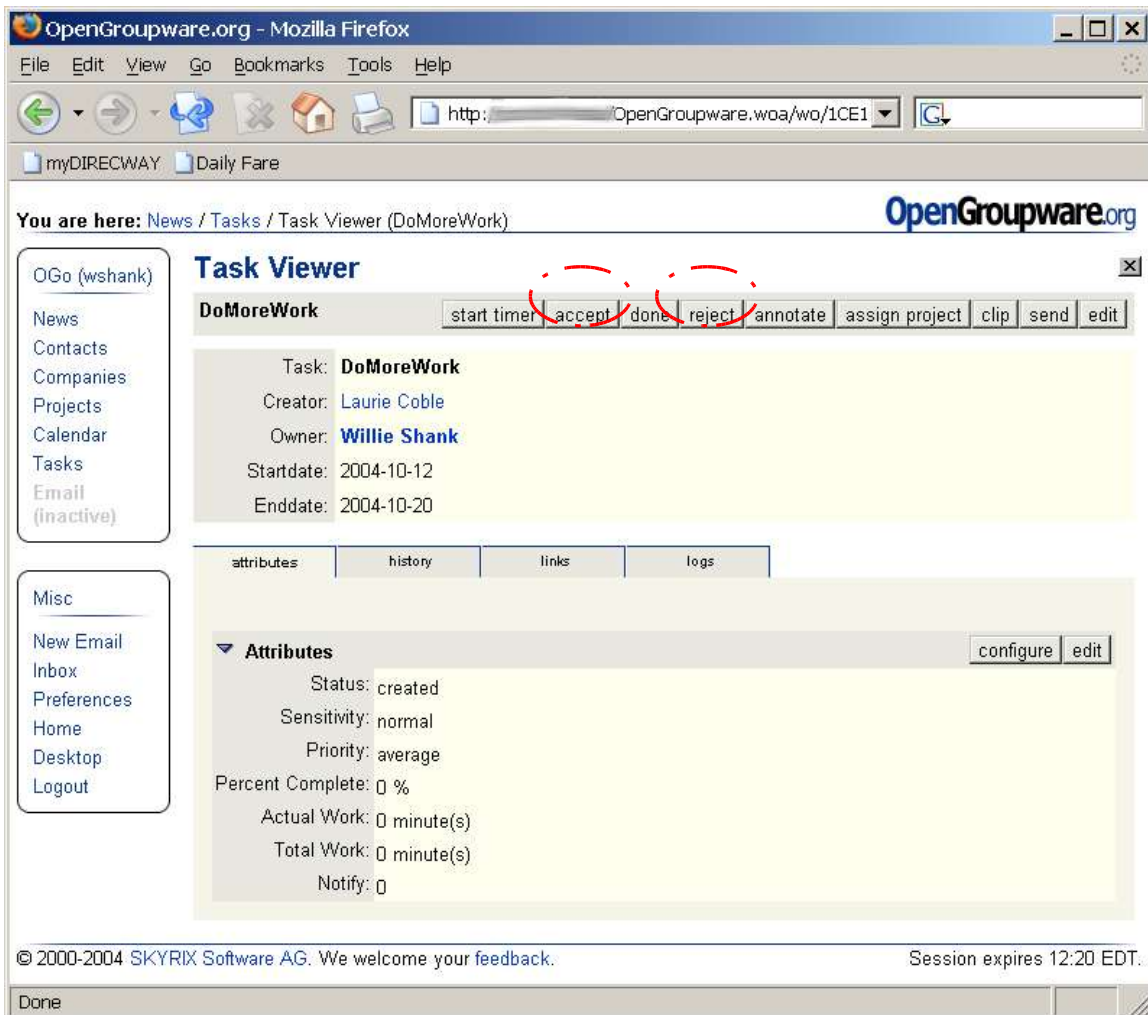


Figure 31 - Task Viewer for Delegated Task

The additional buttons are to **accept** or **reject** the task. Depending on the notification level specified by the creator, email may be forwarded to the creator when you have selected either option. Regardless, the task creator will be able to track the current status of the task on the “delegated tasks” tab of the Tasks screen.

How do I track the status of a delegated task?

The current status of any task that has been delegated to another user may be determined by viewing the “delegated tasks” tab of the Tasks screen. Click on the name of the appropriate task from the list of delegated tasks to display the “Task Viewer” screen. Click on the

history tab to display a record of all actions/updates that have occurred to the task information. A sample delegated task history display is shown in the following diagram.

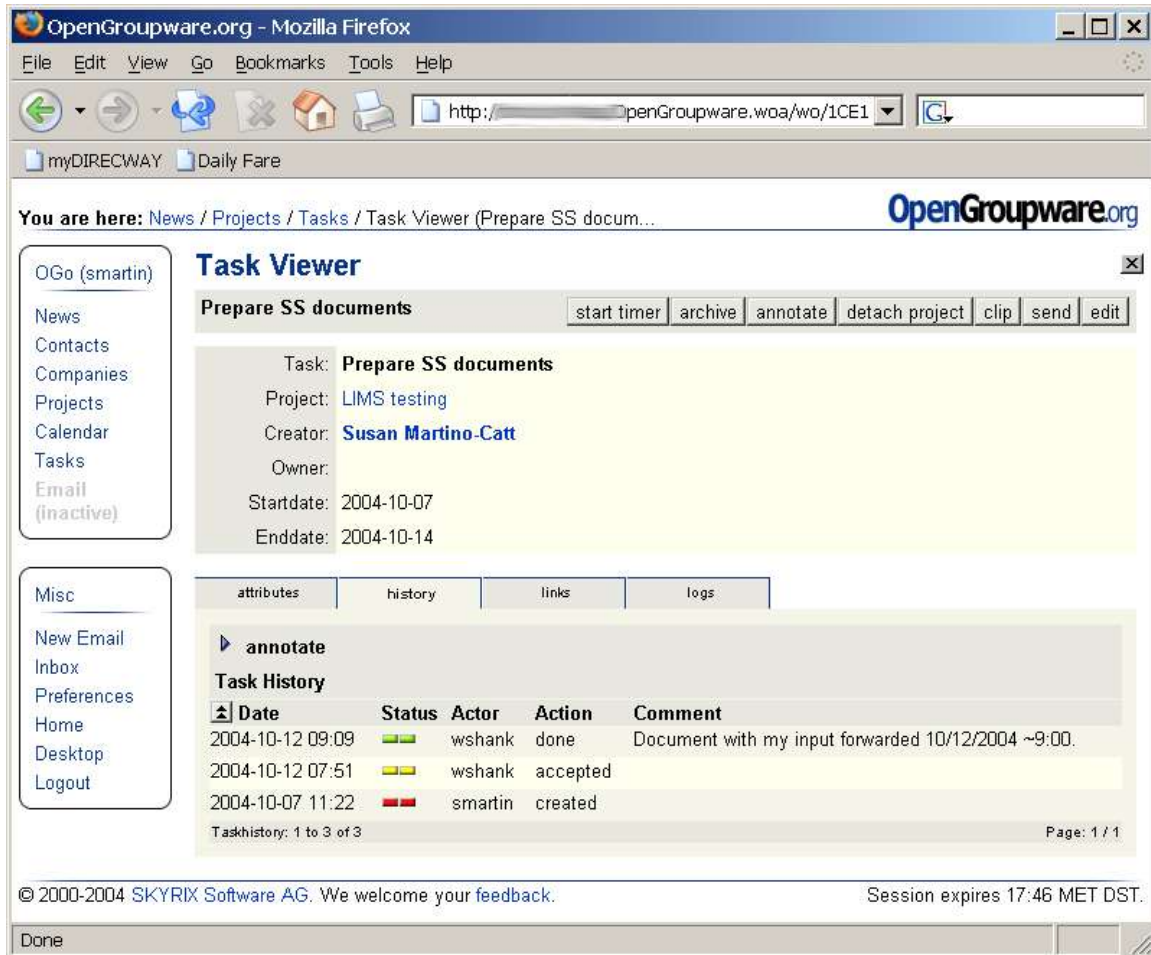


Figure 32 - Delegated Task Status

From the sample display, Figure 32, we are able to determine when the task was created, accepted and completed, along with any comments that were entered for the task at each step.

How do I delete a task?

An active task cannot be deleted. The task must first be archived by selecting the **archive** button from the “Task Viewer” screen. After a task has been archived, a **delete** button becomes available on the “Task Viewer” screen.

How do I archive a task?

To archive a task, click on the **archive** button on the “Task Viewer” screen. Archiving a task moves it from the “to do list” tab to the “archived tasks” tab of the main task list accessed from the “Tasks” link in the OGo dock area. The task will appear in its normal

location on the “tasks” tab of the project screen. In both cases, the status will change to “archived” and the status indicators will be colored gray.

Calendar

The OGo calendar is a very capable system with many features comparable to better-known systems without the overhead of running those other server systems. With OGo, you can maintain a calendar containing both public and private appointments, schedule multiple participants and resources through a “smart” proposal scheduler, link meetings to project data and view or print a calendar summary in several, convenient formats. A sample calendar display is shown in the following figure.

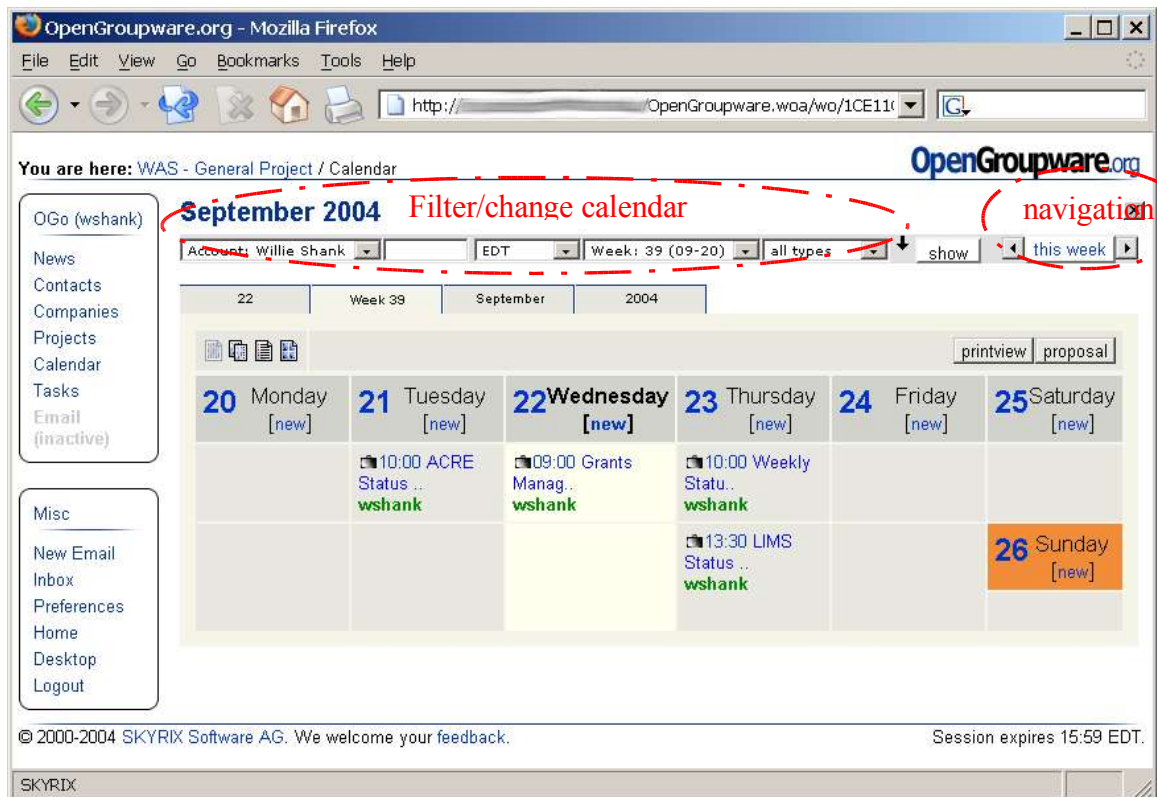


Figure 33 – Sample OpenGroupware Calendar

How do I view appointments

Select the “Calendar” link from the OGo dock area on the left side of the browser window to open the calendar to the default view. The user can change the default view through “Preferences” (see Preferences on page 55 for more information).

OGO provides four tabs that allow the user to select a different view of calendar data as follows:

- The leftmost tab (“22” in the sample), by default displays the calendar for the current user for the current day. Previous or subsequent days may be viewed by clicking on an arrow in the area of the form labeled “navigation” on the sample

figure. Return to the current day by clicking on the “today” link (which replaces “this week” when in “day view”) in the “navigation” area.

- The second tab (“Week 39” in the sample), by default displays the calendar for the current user for the current week. Previous or subsequent weeks may be viewed by clicking on an arrow in the area of the form labeled “navigation” on the sample figure. Return to the current week by clicking on the “this week” link in the “navigation” area.
- The third tab (“September” in the sample), by default displays the calendar for the current user for the current month. Previous or subsequent months may be viewed by clicking on an arrow in the area of the form labeled “navigation” on the sample figure. Return to the current month by clicking on the “this month” link in the “navigation” area.
- The fourth tab (“2004” in the sample), by default displays the calendar for the current user for the current year. Previous or subsequent years may be viewed by clicking on an arrow in the area of the form labeled “navigation” on the sample figure. Return to the current year by clicking on the “this year” link in the “navigation” area.

From any view, you may click on an appointment to open the “Appointment Viewer” screen with complete details about the event.

In addition to the view tabs, OGo allows you to select alternate or additional calendar information or to filter for specific types of events. By selecting and/or specifying additional parameters you can change users, display multiple users on the same calendar or only show meetings, for example. The parameters are specified at the top of the calendar screen (labeled “Filter/change calendar content” in Figure 33) and are as follows:

- To display your personal calendar – The leftmost box at the top of the calendar screen is a list-of-values that defaults to the current user. To change from viewing another user’s calendar to your own, select the your own account from the list-of-values.
- To display another user’s calendar – Following the leftmost box at the top of the calendar screen is a text box that allows data entry. From the list-of-values, select the “all intranet” option, option, type part of a user name in the text box and click on the **show** button to search for and display another user’s public calendar events.
- To display a combination view of your calendar with the public events of another user – Simply perform the steps to show another user’s calendar and select the “me too” checkbox that follows to the right of the text box. Note that the “me too” option only appears when you are viewing another user’s calendar.
- To display a combination view of your calendar with the public events of multiple other users – To display more than two user’s calendar entries, we must first “extend” the “content control” area at the top of the screen. At left side of the screen, just under the list-of-values for user/team selection, there is a filled down-arrow (). Click the icon to enter extended mode.

While in extended mode, type a name in the left-most text box and press the enter key on your keyboard or click on the **show** button. The matching name(s) will be displayed below the text box. Select the one(s) that you would like to display. Repeat typing a name into the text box, pressing the enter key and selecting names until you have selected all the individuals that you want displayed in your overlay calendar. If you want to include yourself, type own name in the text box and select your ID, just as any other user. The following figure is a sample calendar with multiple users selected.

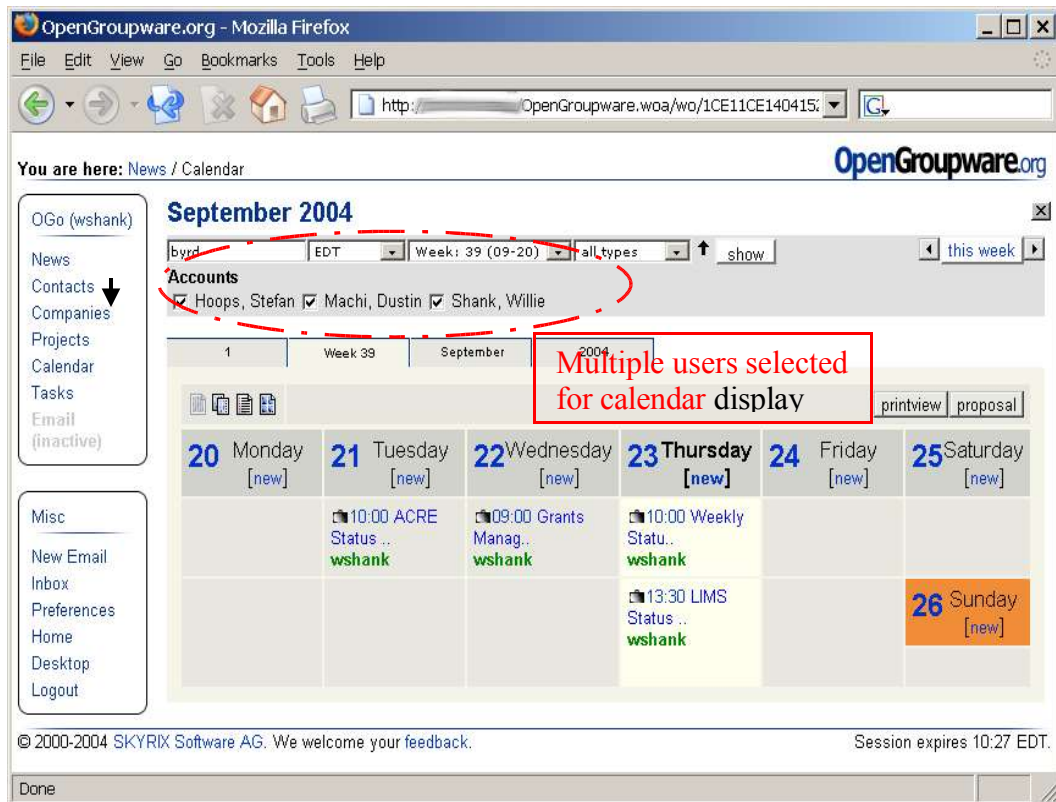


Figure 34 - Multiple User Overlay Calendar Example

While in extended mode, the arrow points upwards and moves to a new position at the end of the row of list-of-values boxes. Click the up-arrow to return to “normal” mode. The **show** button and the up-/down-arrow move together.

If you choose to create a new calendar event with multiple accounts specified and selected, the default participants in the event editor will be those accounts specified in the calendar view. Participants may be deselected and removed as necessary.

- To view a different week – Click on the week selector list-of-values (near the center of the screen) to select an alternate week to be displayed in the calendar. The week selector is only available when viewing a calendar in week-view (the Week x tab).

An alternate way to view a different week (or other time period) is to click the arrow buttons at the top-right section of the screen to move forward or backward through time in the scale derived from the view tab (i.e. one week when in week view; one year when in year view).

- To restrict the type of appointments that are displayed – Click the appointment type selector at the right end of the row of list-of-values to select the appointment type that you are interested in.
- To generate a printable version of the current view – Click the `printview` button at the top-right corner of the calendar section of the screen. A new window will be opened containing the print formatted calendar view.
- To change calendar formatting – Click on one of the formatting buttons at the top-left corner of the calendar section of the screen. The available formats are as follows:




Overview () – Available while displaying the day and week view tabs. The format is a traditional, verbose calendar view.

Chart () – Available while displaying the day and week view tabs. The format is a matrix with date on the x-axis and time on the y-axis. Appointment presentation is quite terse.

List () – Available while displaying the day and week view tabs. The format is essentially a timeline. Appointment presentation is quite terse.

Columns () – Available only while displaying the week view tab. The format is a two-column condensed calendar. Appointment presentation is verbose.

The OGo default time zone in near the center of the lists-of-values is Middle European Time (MET). This setting is user configurable in the OGo Display Preferences. See the section titled “Preferences” on page 55 for more information.

How do I add a calendar entry?

Calendar events can be created, from the calendar screen, by following two different paths depending on the category of event you want to create.

Click on the “[[new](#)]” link within the calendar to create events that involve only yourself, such as reminders, due dates and vacation. The “[[new](#)]” link is available in three of the four calendar view tabs as follows:

- Day view – in the time column
- Week view – in the day heading
- Month view – in the block for each day
- Year view – not available. You must first select a day to display the calendar in day view before creating an event.

Click on the `proposal` button at the top-right of the calendar display area to create events that involve multiple people such as meetings. The proposal option allows you to specify the users involved and will help find meeting date/times that are open for all participants.

In the following paragraphs, both types of calendar events are explained in more detail.

The five sections of the screen offer schedule settings for the event, participants or resources required for the event, access permission and comments. Each section and the data it contains is detailed as follows:

- Appointment on *[date]*

Start time, End time – The start and end times for the event or meeting. Creating an event with start time equal to end time is essentially a milestone or reminder. The default setting for time list-of-value boxes is the 24-hour clock. This setting is user configurable in OGo Display Preferences. See the section titled “Preferences” on page 55 for more information.

All day – This checkbox allows you to easily schedule the event for the entire day. Selecting the checkbox removes the start and end time list-of-values from the screen.

Title – User specified name for the event or meeting.

Location – An optional field to specify the location of the event or meeting. Note that the location is distinct from a resource that might be scheduled such as a meeting room. Though both the location and resource fields may contain the same information, entering a meeting room name in the location block does not “schedule” the meeting room/resource.

Cycle – An optional field used for recurring events such as leave report submission or monthly status reports.

Cycle end – Required for cyclic/recurring events. The cycle end is specified in date format, not number of cycles. The maximum number of events created by the combination of cycle start, frequency and cycle end cannot exceed 100.

Reminder – An optional field that causes an email reminder to be sent to the user at the specified time period, prior to the event start. There is no option to use a pop-up window-type reminder.

Read access – Used to allow other users to see the event when viewing your calendar. To hide the details of an event (but not the fact that you’re “busy”, select the “private” option.

Ignore conflicts – *Sort of a misnomer since there is really no button to ignore conflicts.* Used to select the frequency of conflict checking. When the event conflicts with another event or meeting on your calendar, you will be given the opportunity through a conflict notification screen to ignore the conflict or return to the appointment editor to make necessary changes. A sample conflict notification screen is shown in the following figure.



Figure 36 - Sample Conflict Notification

Appointment type – Used to categorize the calendar event. Available types or categories are as follows:

unspecified (default)	vacation	phone call
birthday	due date	ill
tradeshaw	outward appointment	
meeting	at home	

- Search Participants – Used to specify participants in the event. Select a search category from the list-of-values and enter search criteria into the text box. Press the **search** button and select individual users from the search results.
- Search resources – Used to specify resources, such as conference rooms, required for the event. Similar to a participant search, enter search criteria into the text box, press the **search** button and select individual resources from the search results.
- Set Write Access – Used to specify system users that may update the calendar event. Similar to the participant search, select a search category, enter search criteria, and select individual users from the search results.
- Comment – Used to enter general comments about the task. The size of the multi-line text box may be expanded or contracted with the “+” and “-” buttons at the bottom right side of the text box.

When event detail entry has been completed, click on the **search** button to save the event. You may click on the **save and mail** button to send an event notice to another

user of the system. The **cancel** button quits the appointment editor and discards any changes.

Proposal

A calendar proposal typically involves multiple people and one or more resources. Generally an OGo user would create a meeting proposal for a group of users on a specific topic.

To create a proposal, click on the **proposal** button from the top-right corner of the calendar display section of the screen. The first step in coordinating a meeting that involves multiple characters is to find a common time of availability. Therefore, the “Search Appointments” screen is displayed as shown in the following figure.

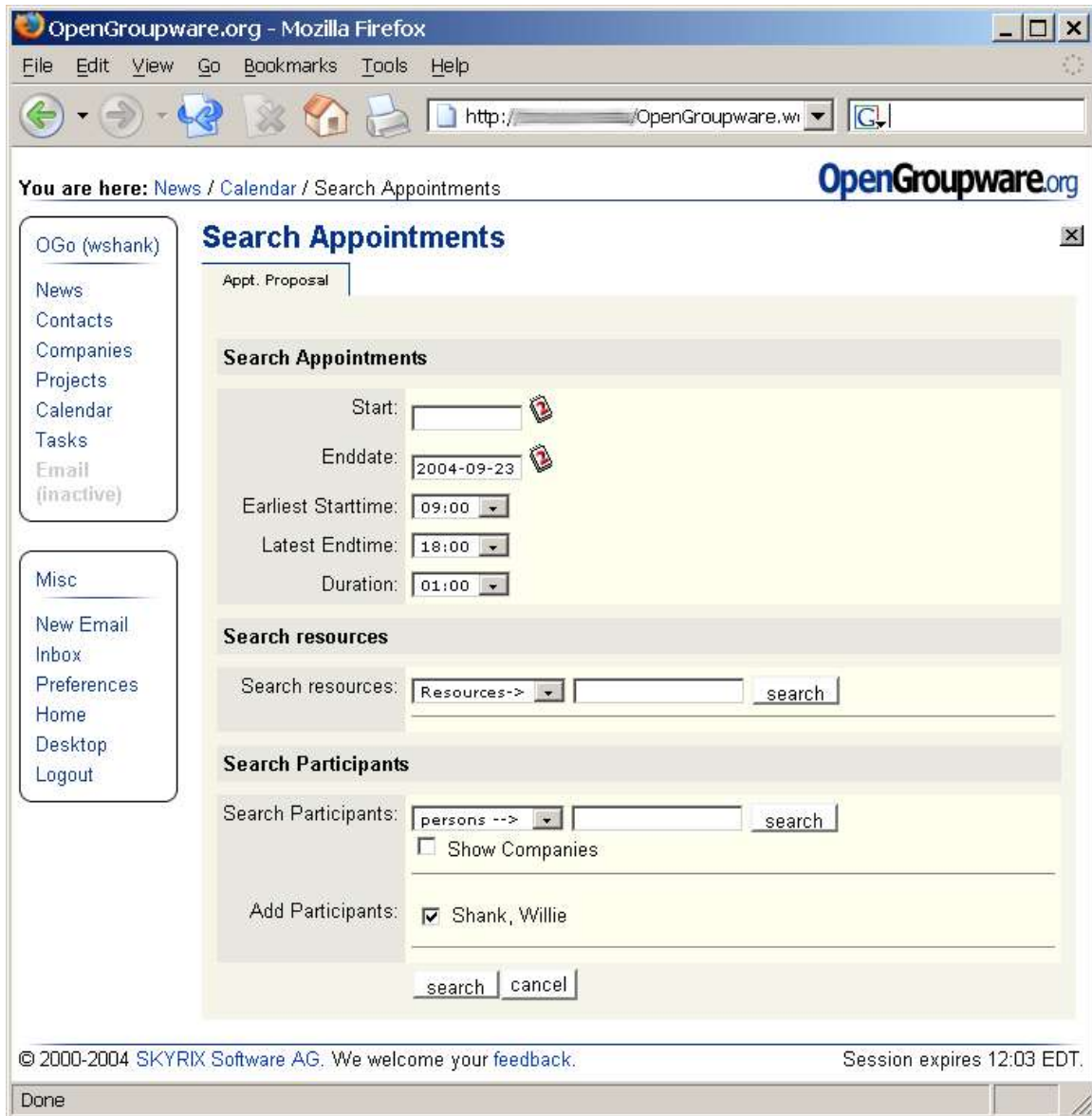


Figure 37 - Search Appointments

The search screen contains areas for the user to specify the required people, resources and duration for the meeting along with the preferred time period. Search criteria fields are as follows:

- A search range, specified by entering start and end dates may be entered manually or by selecting values from the calendar pop-up that is displayed when the calendar icon (📅) is clicked.
- Earliest start and latest end times must be selected from the list-of-values. Values in thirty-minute intervals are provided. The default time clock setting for OGO is the 24-hour clock. For more information on how to change to an AM/PM format, see the section titled “Preferences” on page 55.
- Duration must be selected from the list-of-values provided. Values may range from fifteen minutes to ten hours.
- Enter search criteria into the resources text box and click on the **search** button to specify required resources. From the search results, select those that you will include in your proposal.
- Select an appropriate participant category, enter search criteria and click on the **search** button to specify required participants. From the search results, select those that you will include in your proposal.

When the desired proposal criteria have been entered onto the “Search Appointments” screen, click on the **search** button to initiate automated identification of available appointment date/times. When potential meeting times have been identified that fit the specified criteria, a matrix will be added to the bottom of the “Search Appointments” screen similar to the following figure.

	8		9		10		11		12		13		14		15	
	00	30	00	30	00	30	00	30	00	30	00	30	00	30	00	30
2004-10-01	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2004-10-02	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2004-10-03	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2004-10-04	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓
2004-10-05	✓	✓	✓	✗	✗	✗	✓	✓	✓	✓	✓	✓	✓	✓	✓	✓

Figure 38 - Proposal Search Results

The times that are unavailable are blocked out with a rose color. Available times are shown with a green triangle. You may click on any green triangle to schedule the appointment for that date/time. The matrix will be removed from the bottom of the screen and you may continue with completion of the appointment title, location, etc. as was discussed in the previous section – “Event” beginning on page 46.

How do I update a calendar event?

To update a calendar entry, open the event by clicking on its link from any calendar view. The “Appointment Viewer” will be displayed as shown in the following figure.

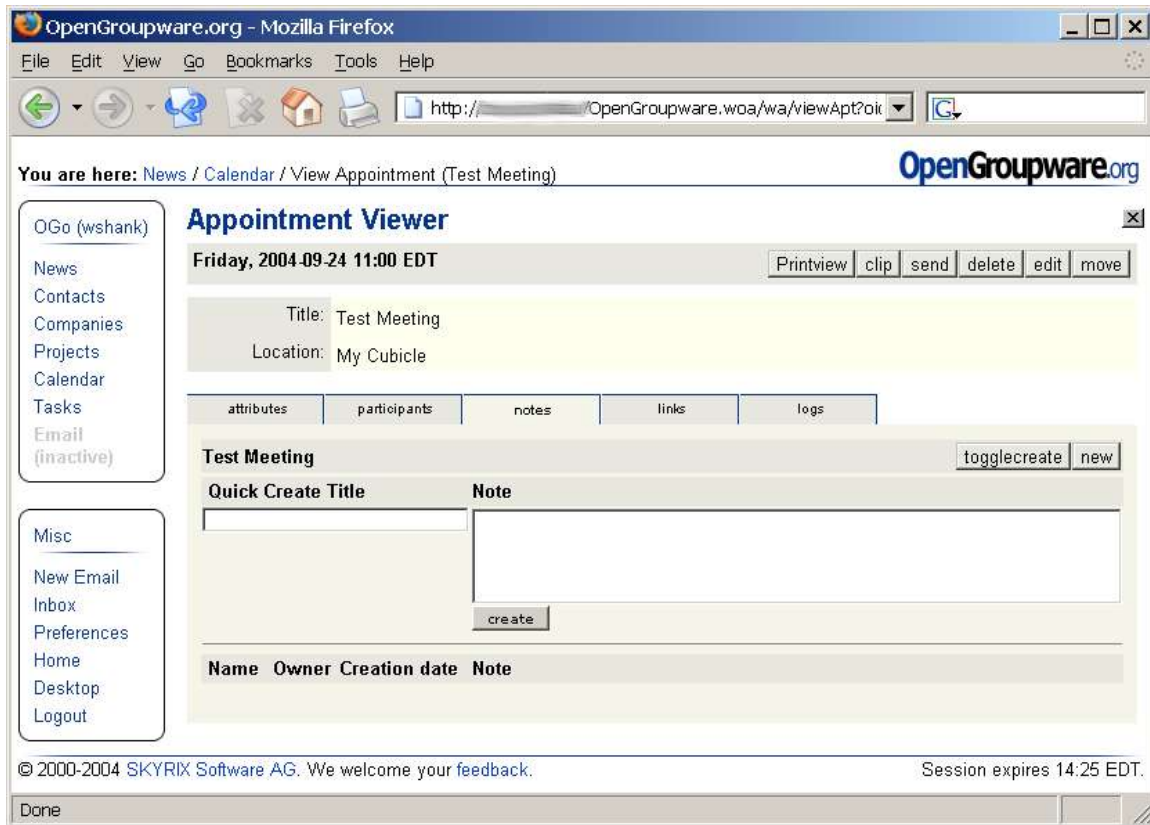


Figure 39 - Appointment Editor

The actions available from the button bar at the top right corner of the screen are as follows:

- **Printview** – Generate a printable version of the appointment that shows all detail data.
- **clip** – Copy a link to the appointment to the clipboard so that it can be pasted as a link within a project or task. ***This operation does not currently function correctly.***
- **send** – Send an email message to another OGo user containing a link to the appointment.
- **delete** – Delete the appointment from the calendar. A confirmation is requested before the appointment is deleted. For a recurring event, the user has the option to delete a single instance or all occurrences.
- **edit** – Modify details of the appointment in the “Appointment Editor”. In the editor, the user has the option of changing any or all appointment details. When complete, you can save the changes or cancel. When saving the changes, you have the option of sending a link to the appointment to another OGo user in an email message.

- **move** – Change the date or time for the appointment when not using the “Appointment Editor” mentioned previously. With the move command, the user may move the appointment a specified number of selected units earlier or later than the original appointment. A sample move screen is shown in the following figure.

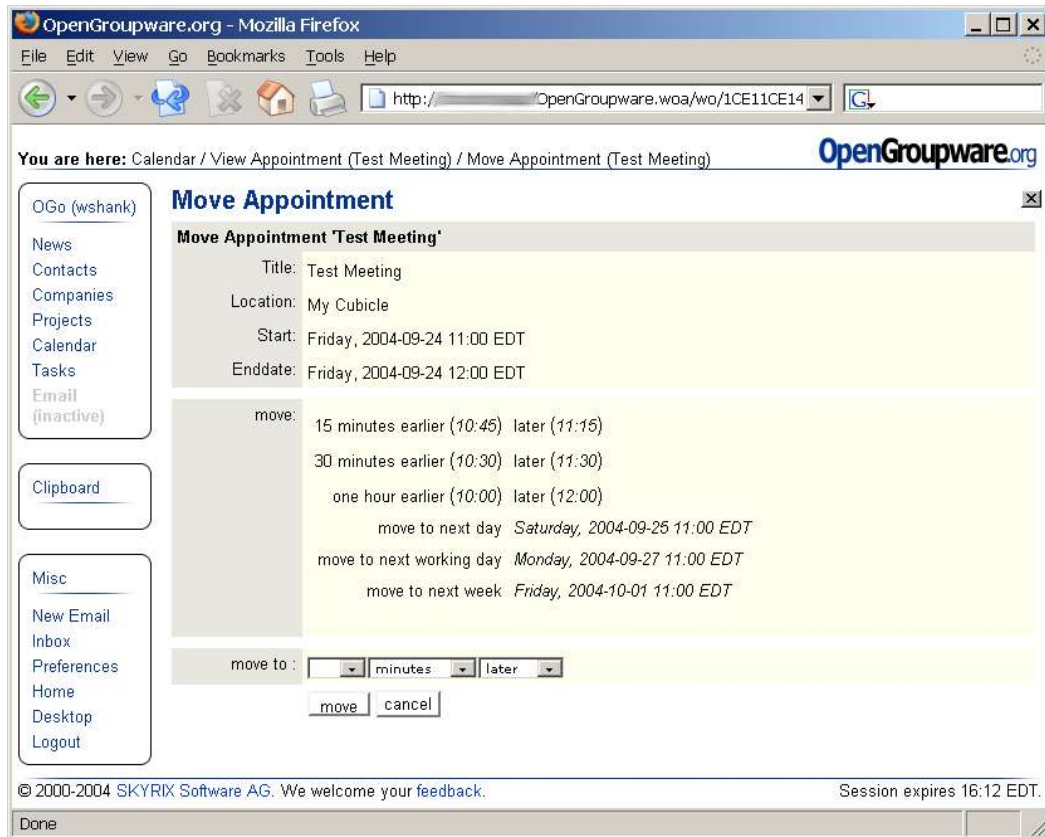


Figure 40 - Sample "move" Appointment Action

The “Appointment Viewer” screen separates appointment details into five tabs as follows:

- **attributes** – Displays appointment details such as the date/time, reminder setting, appointment type, access list and version.
- **participants** – Displays the list of people who have been selected to participate in the meeting. From this tab, the user may click on a participant link to view more detailed information about the user in the “Person Viewer”.
- **notes** – Allows the user to create additional notes for the event in either a quick-editor section of the “notes” tab or in a new screen -- “Edit Note”. The quick-edit section of the screen can be turned on/off by clicking on the `togglecreate` button. The “Edit Note” screen is accessed by clicking on the `new` button. When using the note editor, the user has the option of creating a link from the appointment to a project. See the following section titled “How do I link a calendar event to a project?” for more information.
- **links** – Contains a list of links to external data sources that relate to the appointment.

- logs – Contains a history of changes that occur to the appointment detail data.

How do I delete a calendar event?

To delete a calendar event, you must first display the appointment editor by clicking on the appointment from the calendar screen. The button bar in the top-right corner of the appointment viewer contains a `delete` button. Click on the `delete` button and confirm the request. For a recurring event, the user has the option to delete a single instance or all occurrences. Alternatively, there are `delete` and `delete all` buttons available from the bottom of the “Appointment Editor” screen. Click on the `edit` button, scroll to the bottom of the screen, click either `delete` (for a single event) or `delete all` (for all occurrences of a recurring event) and provide confirmation for the delete request.

How do I link a calendar event to a project?

To link an appointment to a project, first display the “Appointment Viewer” by clicking on the event from the calendar view. Next, click on the “notes” tab and then the `new` button to create a new note in the note editor. Enter a project name in the “Search Project” text box and click on the `search` button. Select a project from the search results, enter a note title and appropriate comments and click on the `save` button to create the note. A sample screen is shown in the following figure.

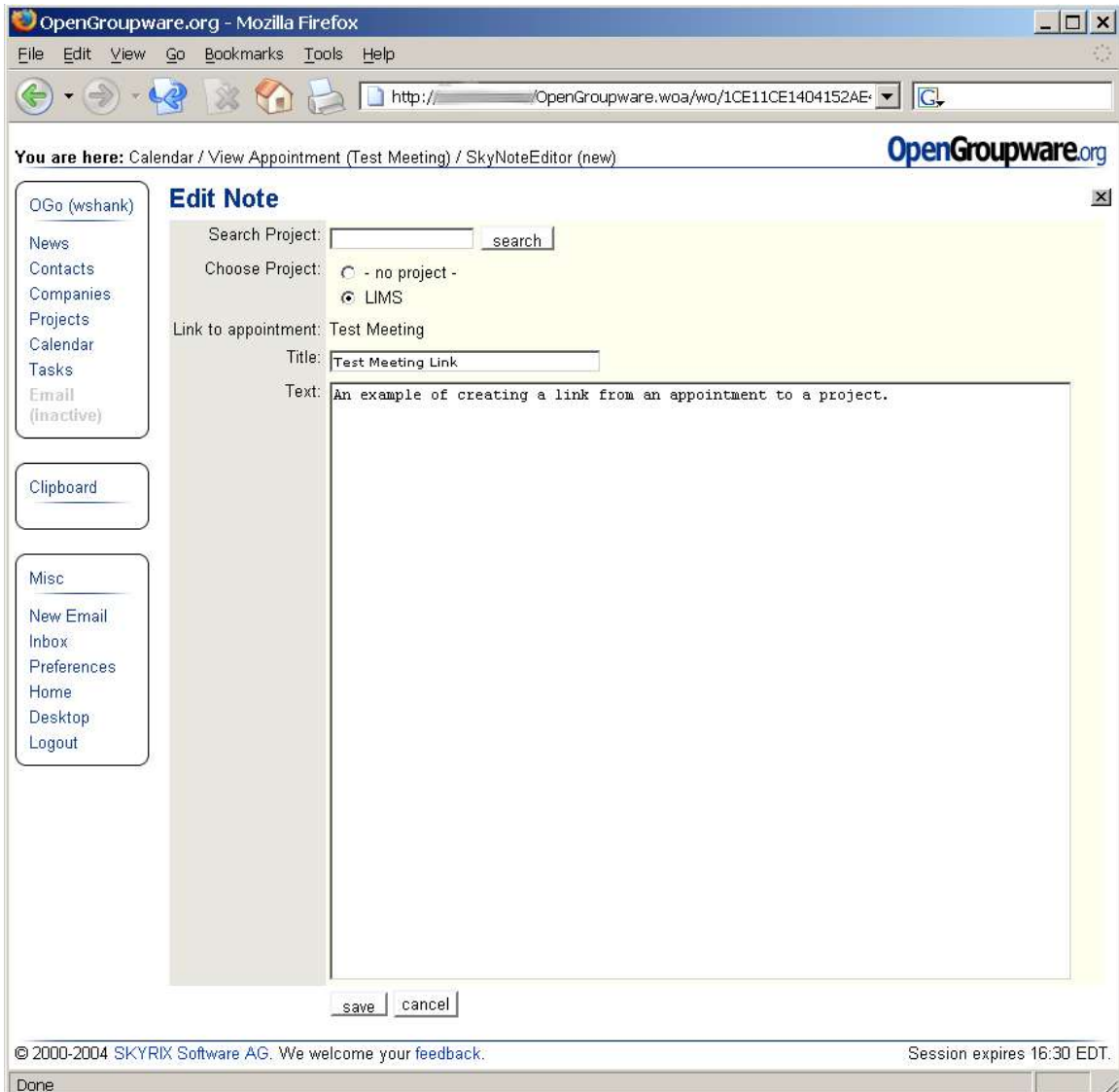


Figure 41 - Sample Appointment/Project Link

The link will be displayed on the notes tab of the selected project with a special calendar icon as shown in the following figure.

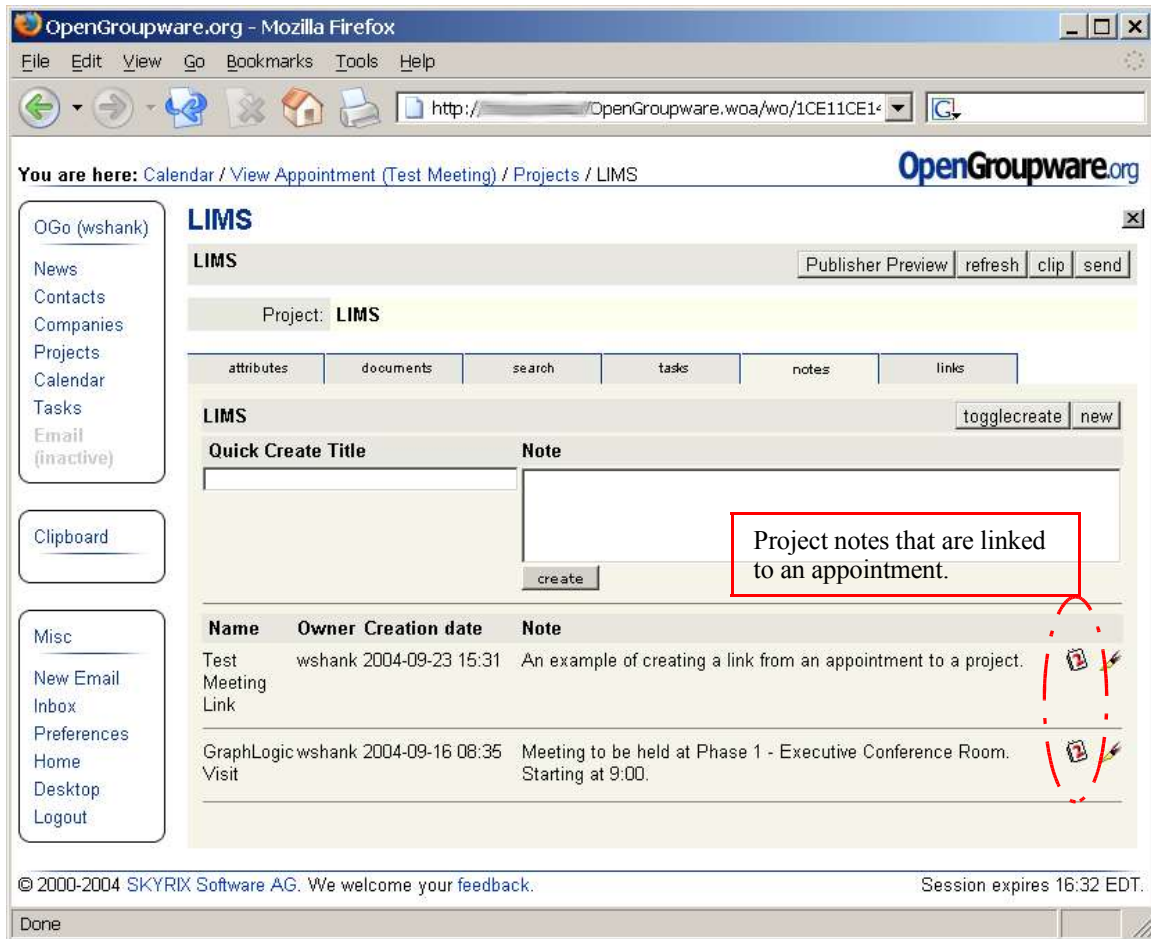


Figure 42 - Sample Appointment/Project Link

Preferences

The preferences screen allows the user to change many of the default settings for OGo. Click on the “Preferences” link from the “Misc” section of the dock area at the left side of the browser window to begin working with preference settings.

In the top-right corner of the preferences screen there are two buttons as follows:

- edit password – allows the user to change the login password for their OGo account. This action should be performed the first time you log into OGo and periodically thereafter.
- edit – allows the user to specify the way their full name shows up in OGo and to specify a nickname and email address (return address). Additionally, the user may upload an existing bookmark file that will be displayed in a new browser window when the user clicks on the “Home” link in the dock area.

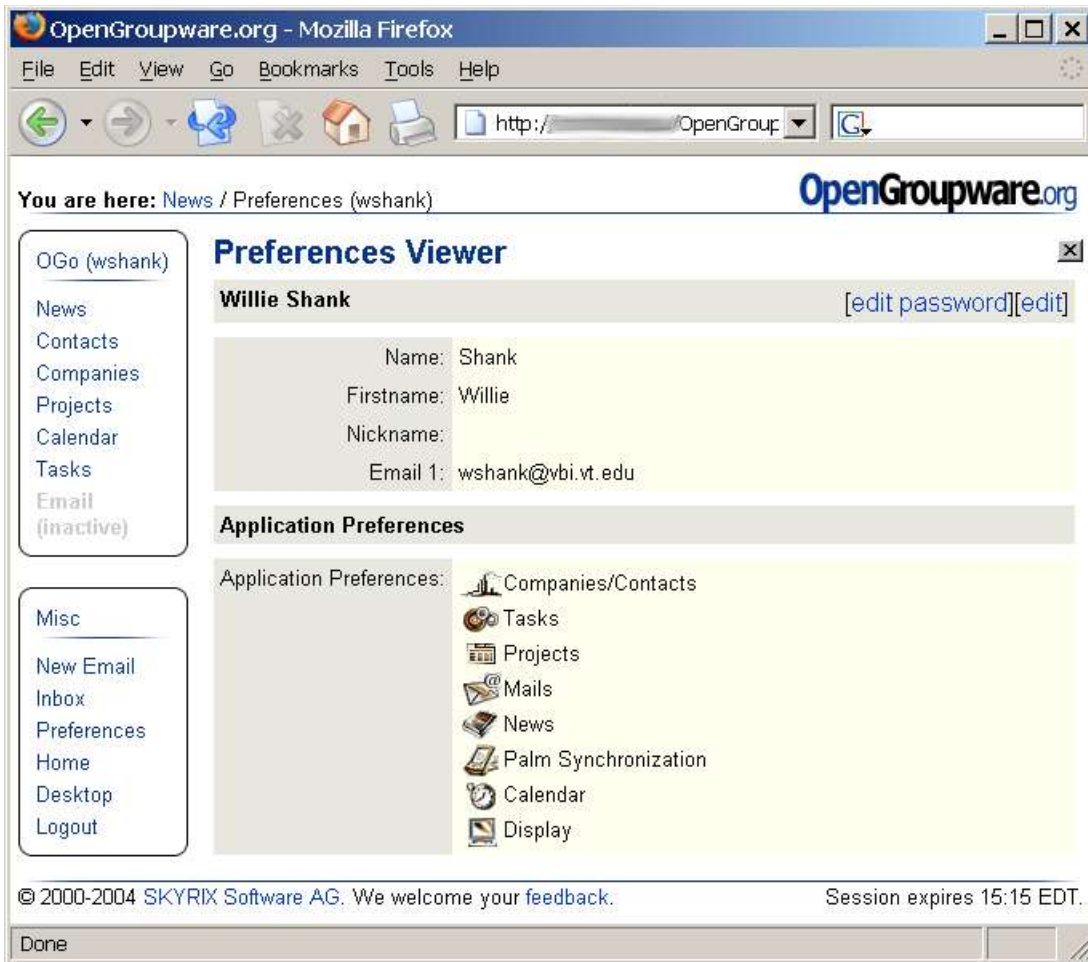


Figure 43 - OGo Preferences

There are eight categories of settings that may be updated through the OGo preferences. The categories and settings within the category are as follows:

- Companies/Contacts – These settings are used to set the default external editor and the length and number of columns for several list types.

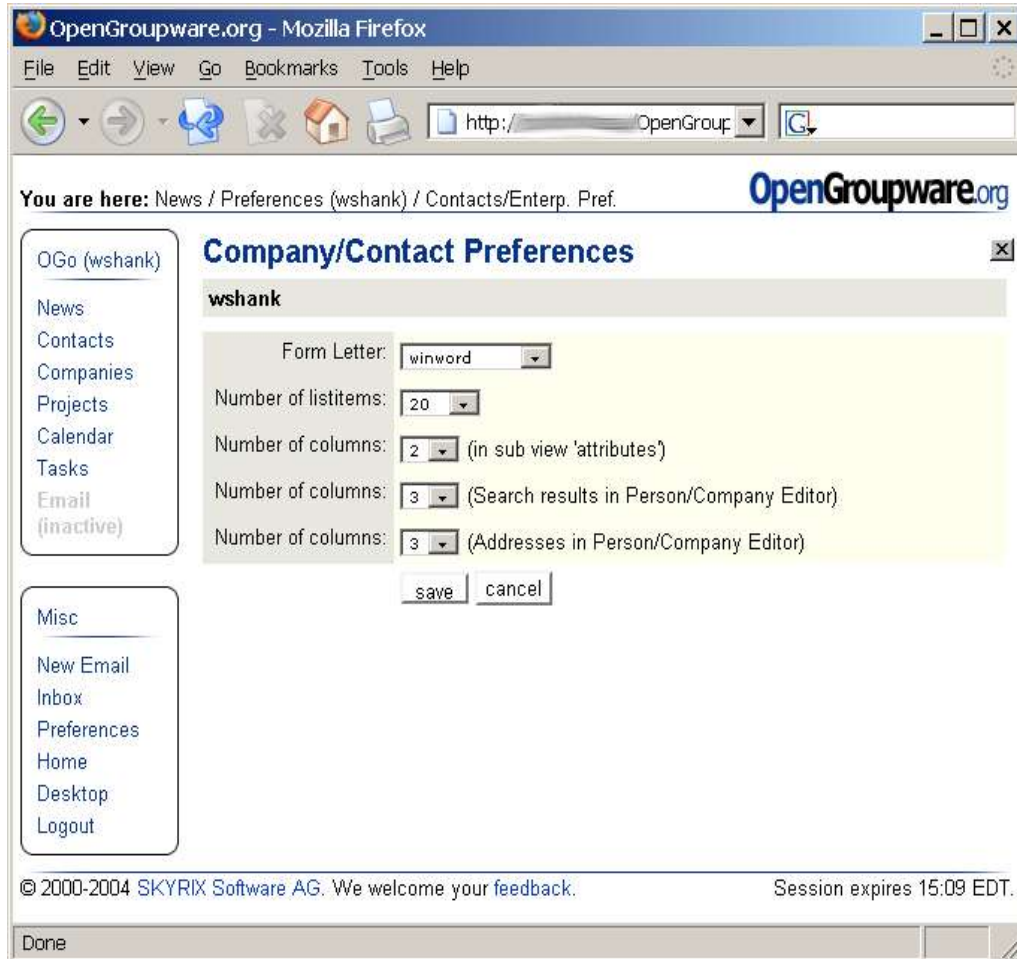


Figure 44 - Company/Contact Preferences

- Tasks – These settings allow the user to specify the tab setting that is displayed by default when entering the “Tasks” screen. List configuration settings may also be changed.

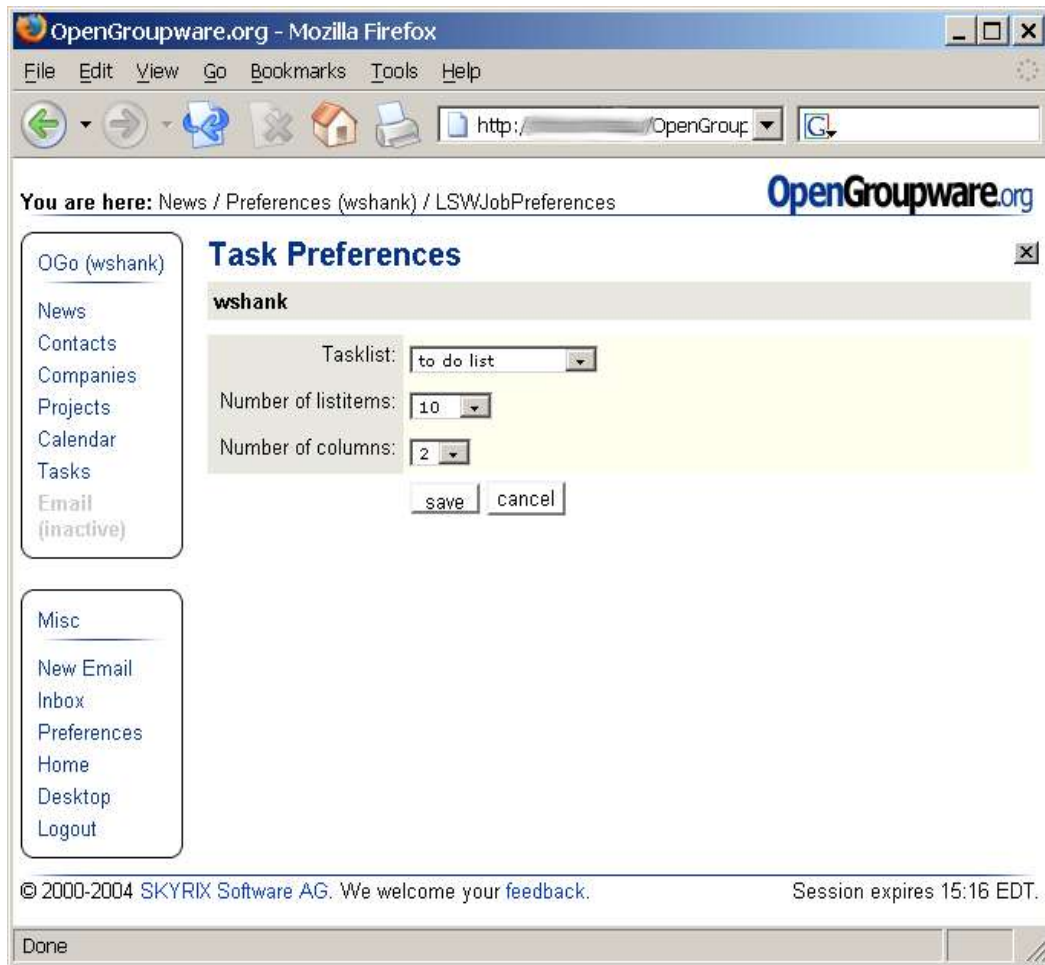


Figure 45 - Task Preferences

- **Projects** – These settings allow the user to configure the default tab on the project summary screen and on the detail screen for any individual project. The user may also configure the number of columns displayed in project search result output.

An additional feature of these preference settings is the ability to specify certain favorite or frequently used projects to be listed in the OGo dock area. Search for and select a project(s) using the “Search project” and “Choose project” sections of the screen to specify those that you want to appear in the dock area. The Project section is displayed between the main OGo pane and the “Misc” pane as in the following figure.



Figure 46 - Project Preferences

- Mails – There are many email options that may be configured using the settings in this section. Some, more frequently changed settings are as follows:

Type of mail editor – you may use mail editor screens built into OGo, or an external mail program such as Thunderbird or Eudora.

Send mail as – plain text or html format.

View images inline – yes/no checkbox.

View attachments inline – yes/no checkbox.

Show next message after delete – yes/no checkbox.

Return receipt – configuration of automatic, ask, never along with subject and text of return receipt message.

Signature text

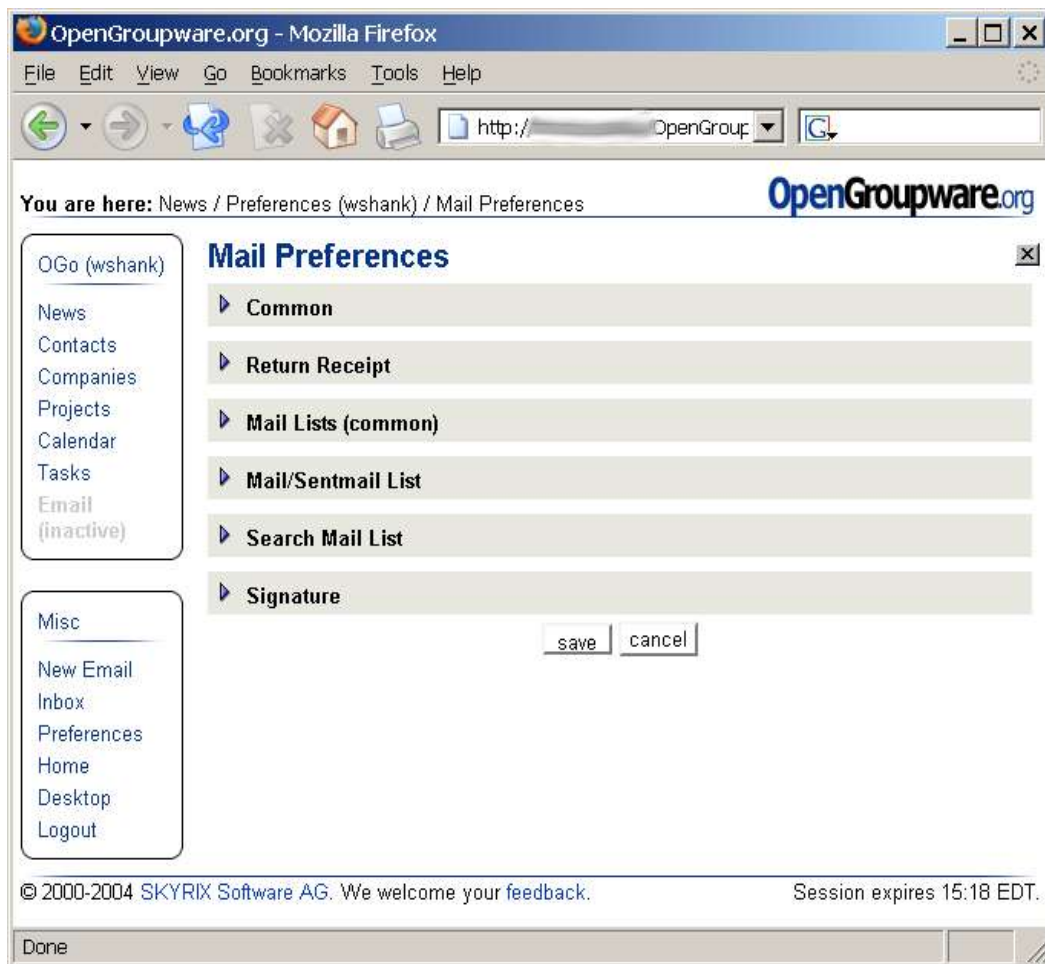


Figure 47 - Mail Preferences

- News – These settings control whether local news (controlled by the local OGo administrator) is displayed, the number of items/days of information that are shown in the appointment and task lists and whether or not overdue jobs are displayed in the task list.

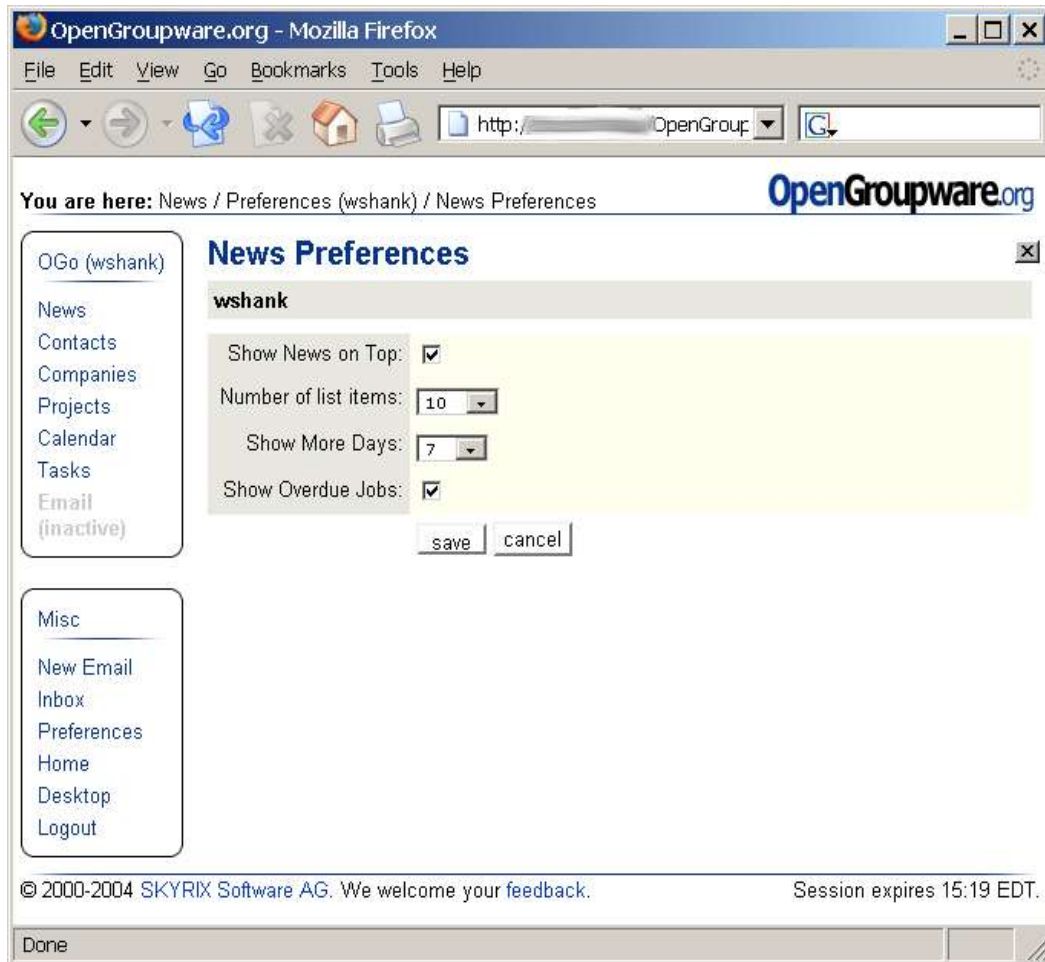


Figure 48 - News Preferences

- Palm Synchronization – Numerous settings controlling what information is exchanged during Palm synchronization and how data are mapped.

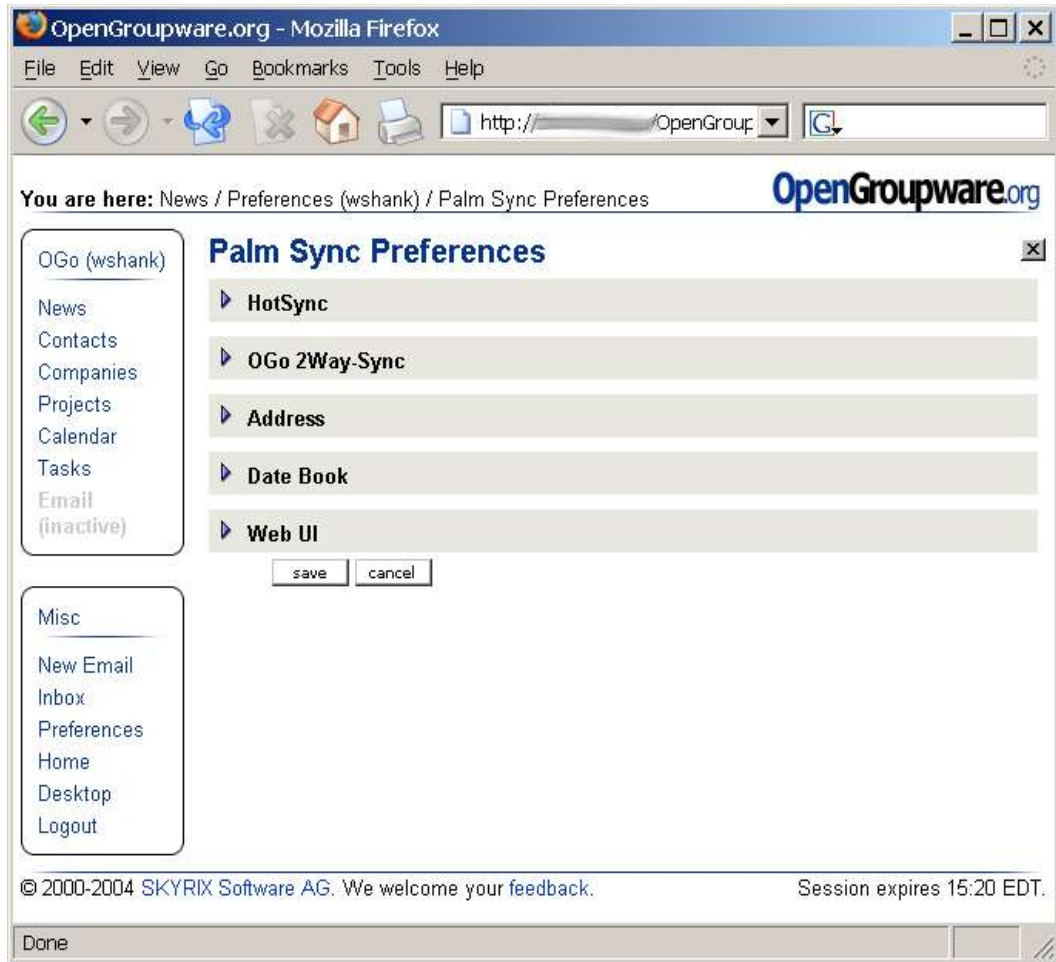


Figure 49 - Palm Synchronization Preferences

- Calendar – Control settings for calendar and task scheduling activities. Available options include default tab settings and calendar view, the names that appear in the calendar user list-of-values (to select user's calendar to view), settings for some overview displays, control who has write access to the calendar and selection and/or specification of holidays displayed on the calendar.

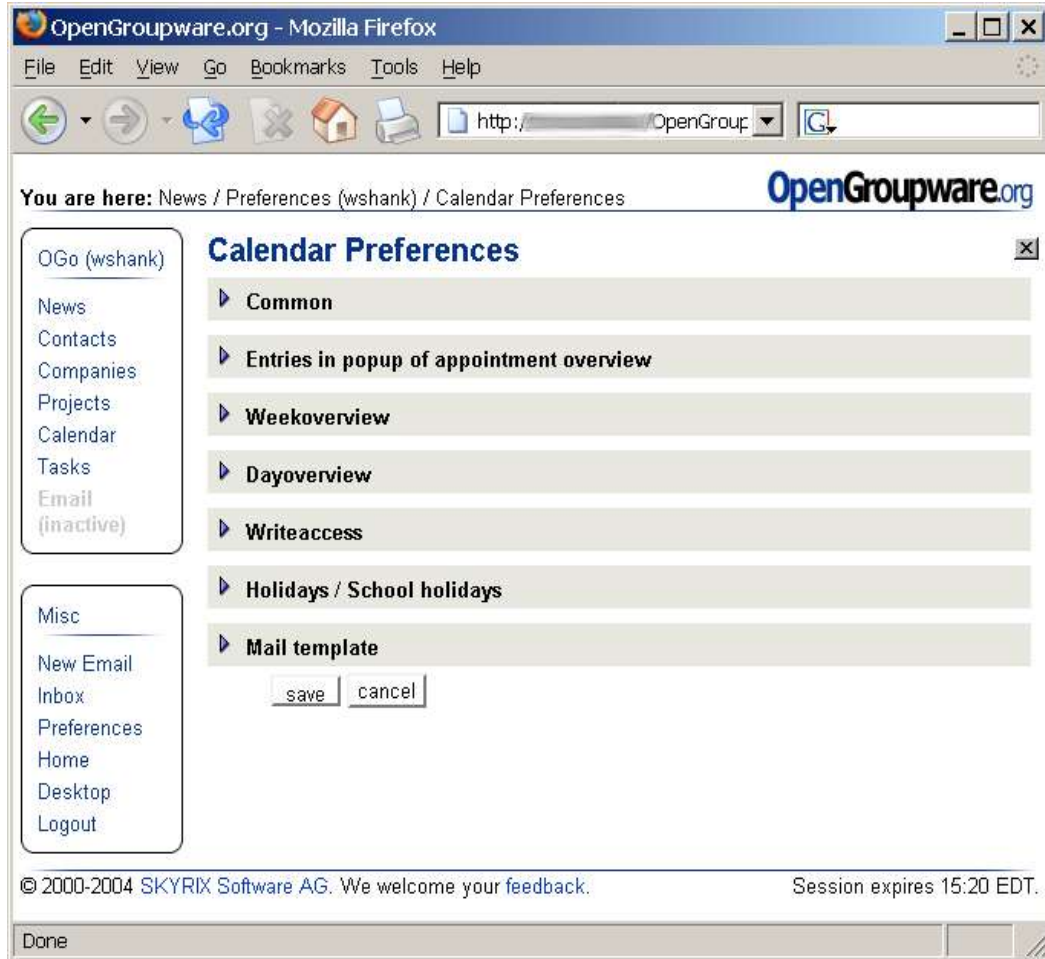


Figure 50 - Calendar Preferences

- Display – These settings control the default language, time zone, time display (12- or 24-hour clock) and allow you to change the links that appear in the dock area and the order in which they are listed.

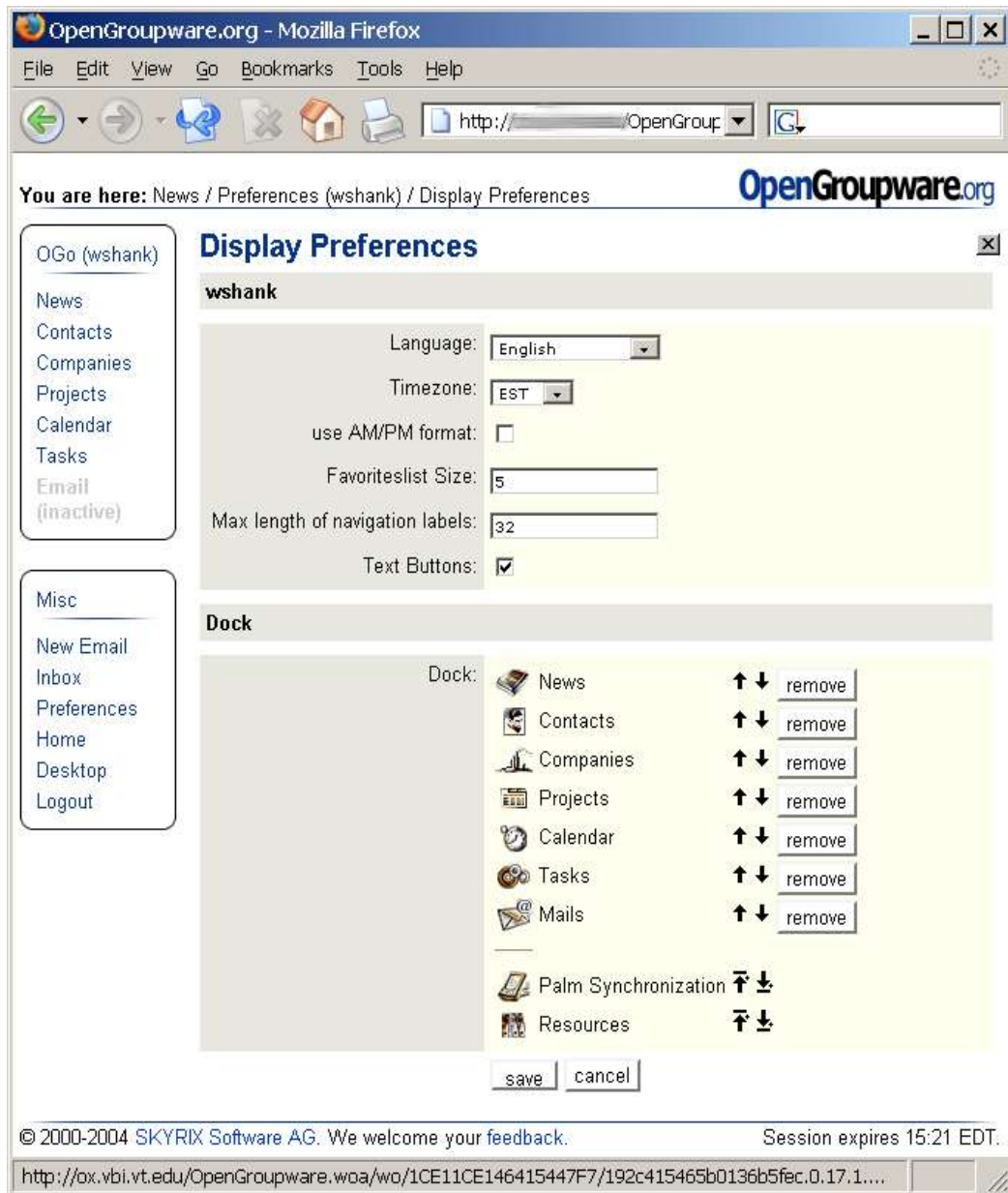


Figure 51 - Display Preferences

Note that the “Text Buttons” option functionality may be counter-intuitive to some users. When “checked”, the list of options at the top-right of many OGo screens are shown as hyperlinks. When the option is “unchecked”, those links are rendered as buttons. Observe the difference in the following two figures, Figure 52 and Figure 53.

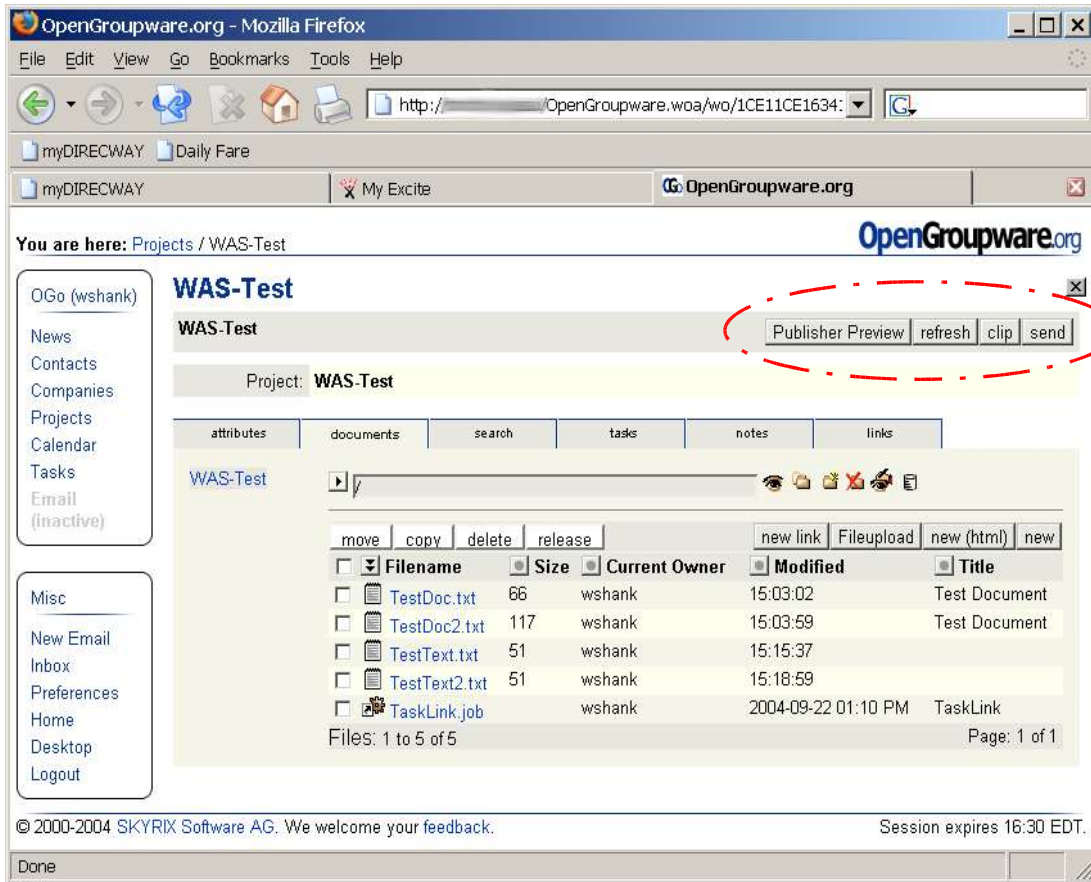


Figure 52 - "Text Buttons" Option Not Selected

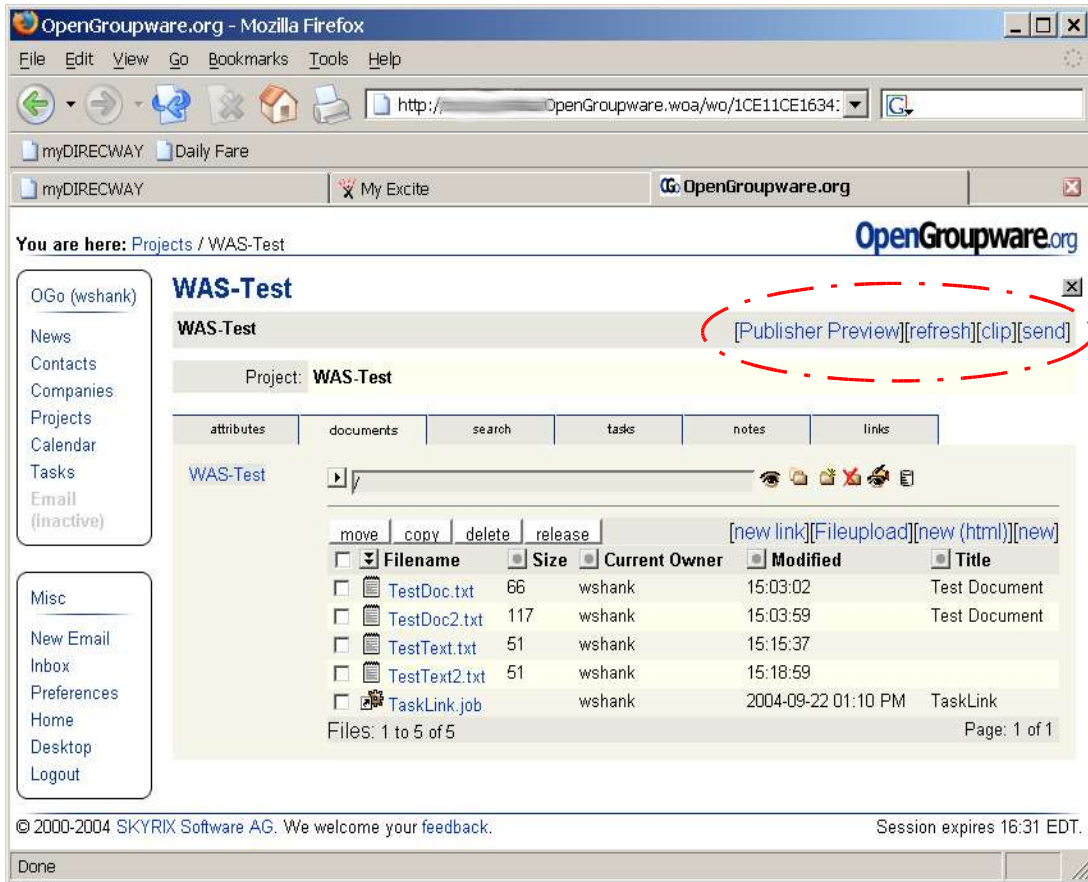


Figure 53 - "Text Buttons" Option Selected

Log out of OpenGroupware

To log out of OGo, click on the "Logout" link in the "Misc" section of the dock area on the left side of the screen. The current user is logged out of e-Mail (if applicable) and out of the OGo application. The initial OGo login screen will be displayed.

Helpful Hints

How do I change my password?

Click on the Preferences link in the Misc dock area and then click on the “edit password” link at the top-right corner of the screen. Enter your old password, new password and confirmation of the new password. Click on the **save** button to complete the password change.

How do I create the project links in the dock area?

Click on the Preferences link in the Misc dock area and then click on the “projects” link. Search for and select the desired project(s) and click on the **save** button.

How do I change my default time zone?

Click on the Preferences link in the Misc dock area and then click on the “display” link. Use the list-of-values in the top section of the screen to select the desired time zone. Click on the **save** button at the bottom of the screen to complete the change.

How do I tell OGo to use my external email client?

OGO can use an external email client for messages initiated by clicking on one of the many **send** buttons throughout the application. However, the inbox and messages initiated from the “New Email” dock link will continue to be displayed on OGo screens.

To tell OGo to use your external email client whenever possible, click on the Preferences link in the Misc dock area and then click on the “mails” link. Under the “Common” heading, select “External” from the “Type of mail editor” list-of-values. To use the built-in mail editor, select “Internal” from the list of values. Click on the **save** button at the bottom of the screen to save changes.

How do I create a knowledge repository?

Create a new project and name it something relevant to the content (i.e. OpenGroupware Knowledgebase). Add a link to the project to the dock area to make it easily accessible. Click on the project link to open the project, select the documents tab to upload relevant files, the notes tab to enter text commentary or the links tab to link to external html documents. Use relevant folder structures on the documents tab to strategically segment documents and remember to set appropriate security for the project and folders.

How do I create a project of projects?

Create a new project and name it something relevant to the content (i.e. My Master Project). Add a link to the project to the dock area to make it easily accessible. Create sub-projects (i.e. Phase I, Phase II, Phase III) and “clip” them to copy the link to the clipboard. Click on the primary project link to open the project and select either the documents tab or the links tab to add sub-projects. On either tab, click “new link”, name the link and select

the appropriate sub-project from the “link target” list-of-values. Use relevant folder structures on the documents tab to strategically segment documents and remember to set appropriate security for the projects and folders.

How do I create a discussion list?

Create a new project and name it something relevant to the content (i.e. OpenGroupware Discussion). Add a link to the project to the dock area to make it easily accessible. Click on the project link to open the project, select the documents tab create relevant folder structures to represent discussion threads. Users may review existing folder content or create new entries by uploading a document, editing a new note, html document on-line or adding a link to an external html document. Remember to set appropriate security for the project and folders.

Appendix A – Supported Sources of Contact/Company Import Data

Outlook – comma-separated values

Outlook Express/Windows Address Book – semi-colon separated values

Netscape – comma-separated values

Netscape – tab-separated values

Comma-separated values

Tab-separated values

Appendix B – Access Permission Values

m - manager

This access right can be granted only for entire projects. With this level of access, a user has complete control over a project. The user can add accounts, create folders and documents, etc..

r - read

The respective project, folder or document can be read or opened.

d - delete

Folders or documents can be deleted (projects can not be deleted). To delete a specific object (i.e. a file), you also need write access (w) for the parent object (i.e. folder).

i - insert

Objects can be inserted into the specified object (i.e. files or folders can be added to a project).

w - write

The user(s) have write access to the project, its folders and files.

f - form

This access will allow user(s) to create and to edit forms.

Appendix C – Supported Time Zones

MET – Middle European Time

GMT – Greenwich Mean Time

PST – Pacific Standard Time

EST – Eastern Standard Time

CST – Central Standard Time

Appendix D – Supported Languages

English

German

Danish

Dutch

French

Spanish

Italian

Portuguese

PtBR

English (OOo)

German (OOo)

English_kde

German_kde