

Manual



version 1.0.8

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Getting started

This section of the user manual is intended for end users. For setup and configuration please see [Administrator's Guide](#).

You should have by now a login information sent to you automatically as an e-mail message from epeSi when your system administrator created you as a user in the application. This e-mail should include:

- login name (for example: jdoe)
- password (for example: X6yRG65)
- link to the application (for example: <http://crm.yourcompany.com>)

The password is randomly generated unless the administrator specified it manually. In any case you should login to epeSi and change your password as soon as possible.

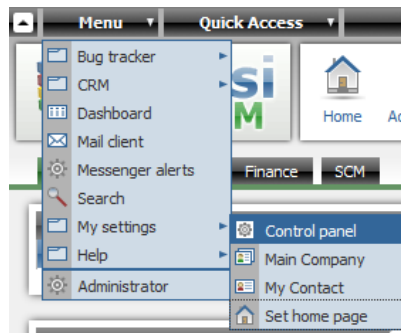
Login

Please enter your login info (username), and password. If you are using a computer that is your personal work or home workstation you can click on **Remember me** box. This box allows you to login to epeSi automatically. Don't select this box if you are using a public computer or a computer that you share with someone.

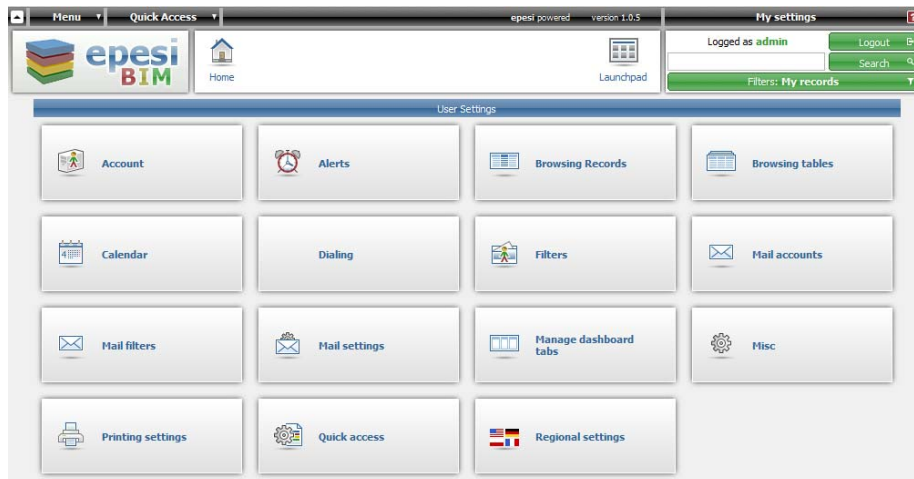


Changing password

After successful login go to Menu -> My Settings -> Control Panel



This will open **Control Panel** where you can adjust various settings in the application. Those settings apply to the way the application behaves **for you only**. Global changes have to be made by administrator.



Click on **Account** button. You need to specify new password (twice), an e-mail address will default to what is stored in the application already, but you can change it here as well, and the old password is required.

Finally click on **Save** button.

Recover Password

In case you forgot your password click on Recover password link right on the [main login page](#). You will need to specify a username and e-mail address associated with your account. Click on OK and the password will be e-mailed to you.

If you don't remember your username and/or e-mail account please contact your administrator.

epesiBIM Overview

epesiBIM is a **web based application** meaning that it does not have to be installed on your computer. All you need to use it is a computer with Internet access and modern browser. **Firefox, Opera, Chrome or Safari** are supported. It works on computers with Windows, Linux and Mac OS X operating systems. Currently we do not support Internet Explorer due to compatibility problems.

epesiBIM stands for **epesi Business Information Manager**. It is an application that stores in a very sophisticated database many types of records, like:

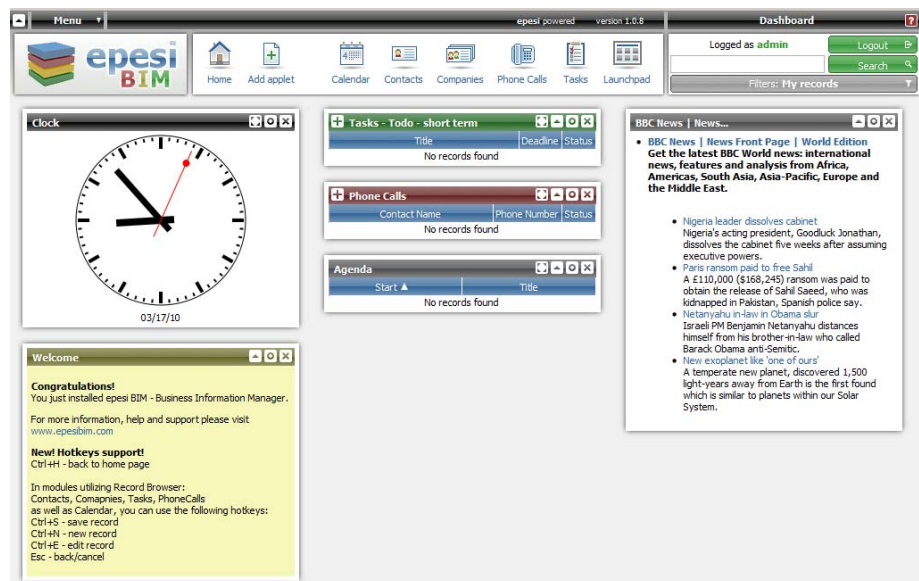
- Companies
- Contacts
- Calendar events
- To do list
- Phone Calls
- Notes

It is a multiuser, real-time collaboration software that allows linking of records to employees and customers. All data and application scripts are kept on the web server. We designed this application in such a way that once information is stored it remains there forever. Even deleted records are kept as hidden from users' view but never deleted from the database.

epesiBIM is offered as FREE and Open Source software. It has modular architecture and the functionality can be extended with additional modules. All modules are written using epesi framework. Please visit <http://www.epesibim.com> and <http://www.epesi.org> for more info.

Dashboard

If you logged in to epesi for the first time you will probably see a screen like this:



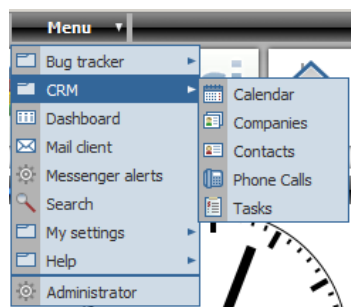
This screen is called a **Dashboard** and it is a special module to display [applets](#). Applets can have many different functions, but generally are used to display some predefined information from other modules in an easy to digest fashion.

Menu Bar

The top of the screen has a **menu bar** that contains:



- **hide Action Bar** button.



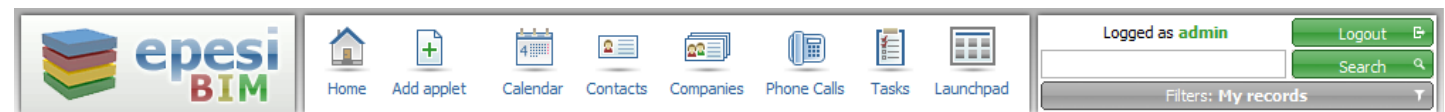
- **Menu** to access all installed epesiBIM modules.

Note that Administrator section is visible only to administrators.

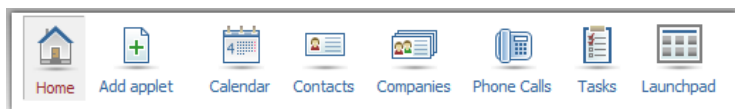
- **About** section showing current version of the application.

- **Module Indicator** - it shows in what module you are in and what action you are performing. It will show if you are browsing records, viewing or editing a single record in full view.

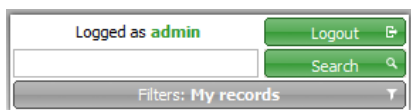
Right under the menu bar there is a section containing:



- **Logo**. This logo can be changed by the administrator. Because 'refresh' button in your's browser will refresh whole Epesi, this is button which refresh actual page inside Epesi.



- **Action Bar** - See section about Action Bar below.



- **Global Search and Filter box**. Here there are the following elements:

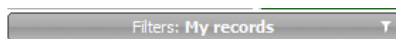
Logged as admin - indicator showing **user logged on**.



- Button to **logout** from the application. Normally you can just **close the browser**. If you click on Logout button the cookie stored by your browser will be deleted and opening the application next time will require the user to login again by providing username and password. It removes the cookie stored by "Remember me" option from the login screen. Logout button should be used when using a public computer to prevent someone else from accessing your data.



- This is a **global search** option. The search engine will try to find a word or a phrase in all records: Contacts, Companies, Notes, etc.



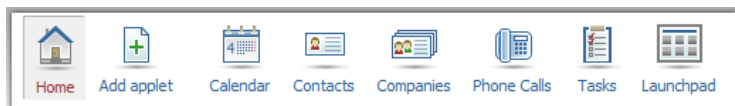
- **CRM Filter**. Some modules use this feature to filter records that belong to a particular user. When it is gray it means that it is inactive. Please see the section about CRM Filters for more details.

Action Bar

Action Bar is an area where the module displays **buttons** to perform different operations, like editing, saving, deleting or creating new records, accessing different modules, etc. As in any database application a user can perform the following basic functions on records (called **CRUD**):

- Create
- Read
- Update
- Delete

We enhanced this functionality by adding ability to **Clone** the record and preserving entire **editing history**, plus as we noted earlier - no record is permanently deleted and can be restored at any time by administrator.



The Action Bar changes depending on the module you are in. This action bar shown above is a default one for a Dashboard. Two buttons are the same in every module however:



Home - **Home button**. Opens your home page.



Launchpad - **Launchpad button**. Opens Launchpad which is a quick way to open a particular module. See the section below for a detailed description.

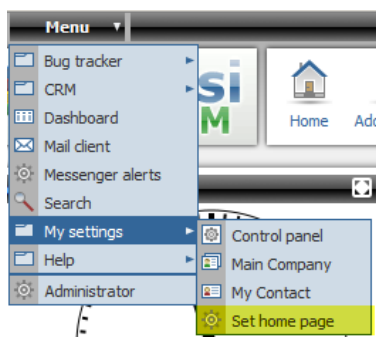
Launchpad

Opens Launchpad which is a quick way to open a particular module. The Launchpad can be customized by the user. Menu shows always all modules accessible to the user. The Launchpad can show only frequently used modules.

Set Home Page



Home - **Home button**. Opens your home page. By default this is your **Dashboard**. You can change Home page by opening any module and selecting from **Main Menu** -> **My Settings** -> **Set home page**.



Applets

Calendar

Calendar is one of the CRM modules. Using this tool you can create, change and view events. You can use it as a planner, organizer and reminder.

1. [Displaying schedules](#)
 1. [Agenda](#)
 2. [Grid views](#)
 1. [Event frame](#)
 2. [Day View](#)
 3. [Week View](#)
 4. [Month View](#)
 3. [Year View](#)
 4. [Options](#)
2. [Displaying event's details](#)
 1. [Event Tooltip](#)
 2. [View Event interface](#)
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3. [Adding and editing events](#)
 1. [Adding](#)
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 5. [Moving](#)
 6. [Closing / cancelling](#)
4. [Deleting events](#)
5. [Interface details](#)

Displaying schedules

Calendar can display events in a few different ways. These are: [Agenda](#), [Day View](#), [Week View](#), [Month View](#) and [Year View](#). You can switch between them by clicking on the respective tabs while in Calendar module.



Agenda

Agenda puts events in a list, one under another. It gives you possibility to view events in a few useful orders, for example chronologically.

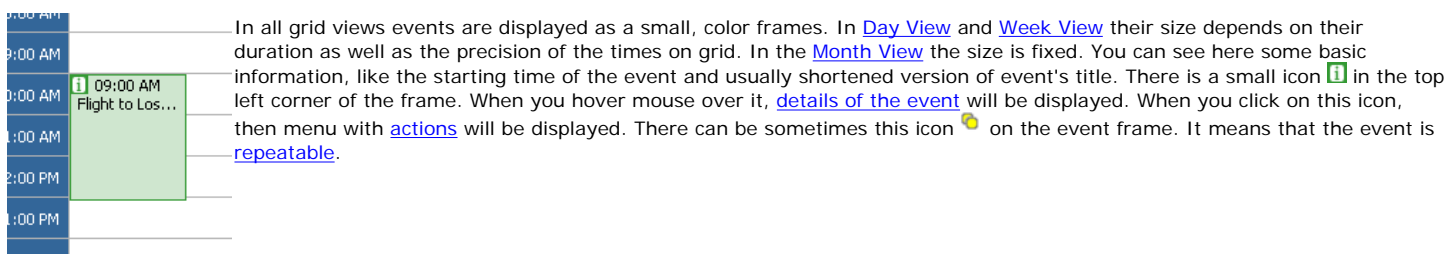
Actions	Start ▲	Duration	Title	Description	Assigned to	Related with
	Mon, 07/06/2009 01:00 PM	1 hour(s) 15 minutes	Staff meeting		Doe John, Phillips Edward	
	Tue, 07/07/2009 09:00 AM	2 hour(s) 0 minutes	Important meeting		Phillips Edward	Davies P. [Customer Company]
	Wed, 07/08/2009 07:00 PM	1 hour(s) 0 minutes	Beer with friends		Phillips Edward	
	Thu, 07/09/2009		Business trip to Los Angeles - first day		Phillips Edward	
	Thu, 07/09/2009 10:00 AM	2 hour(s) 15 minutes	Flight to Los Angeles		Phillips Edward	
	Thu, 07/09/2009 03:00 PM	3 hour(s) 0 minutes	Dinner with potential business partner		Phillips Edward	
	Fri, 07/10/2009 08:00 AM	8 hour(s) 0 minutes	Conference		Phillips Edward	
	Sat, 07/11/2009		Business trip to Los Angeles - last day		Phillips Edward	
	Sat, 07/11/2009 04:00 PM	2 hour(s) 20 minutes	Flight back from LA		Phillips Edward	

1. This panel determines time range for which events are displayed. You can set this range by determining From and To dates. To do this write the proper dates in fields "From" and "To" or choose them using "Select date" buttons. After that click "Show" button and the right events will be displayed.
2. This bar, apart from obvious informational usage, serves as the sorting tool. All fields here, except "Actions", work as sorting buttons. When you click them, you choose the value by which the events are sorted and also toggle ascending/descending order.
3. This icon indicates, that the event is repeatable. Such an event can occur with one of the few different frequencies, for instance once a week on Monday.
4. These buttons serve as shortcuts to the common actions you might want to perform on the events.

Grid views

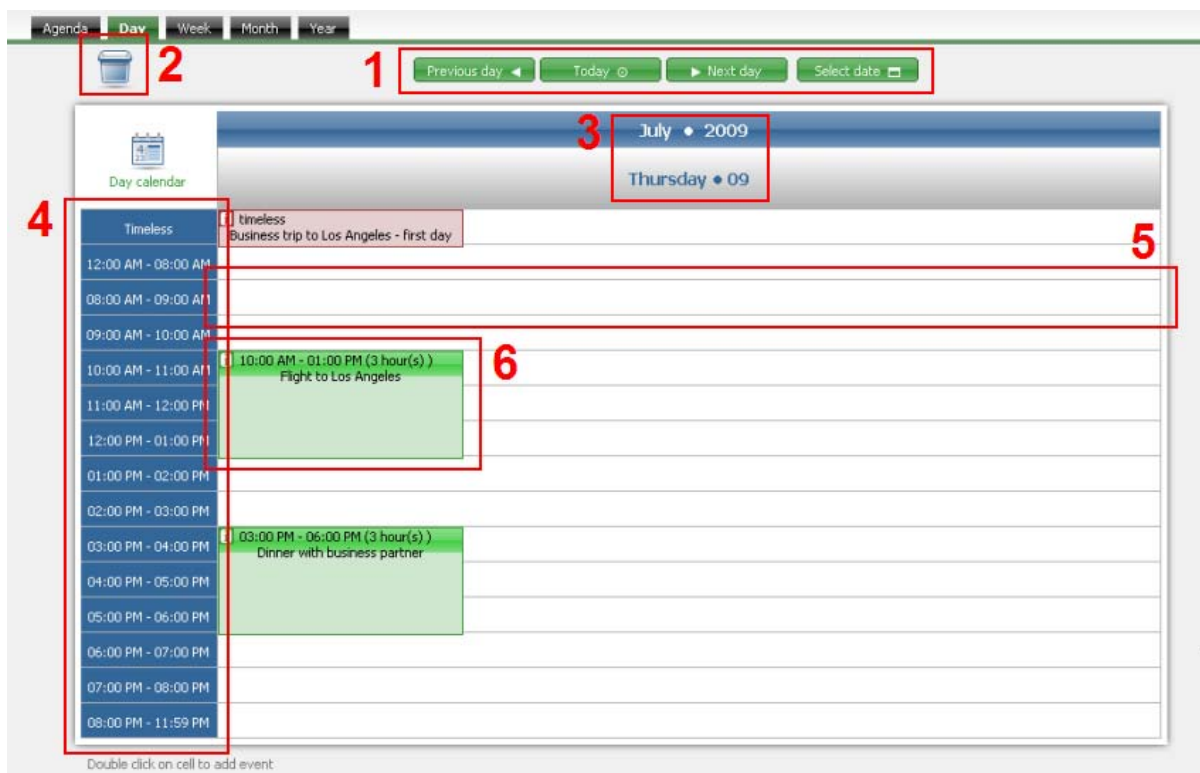
[Day View](#), [Week View](#) and [Month View](#) display events by showing them on time grids. [Day View](#) and [Week View](#) focus on showing the starting dates, duration and overlapping of events. [Month View](#) is more general and display events on the right days, without further details, but in a larger scope.

Event frame



Day View

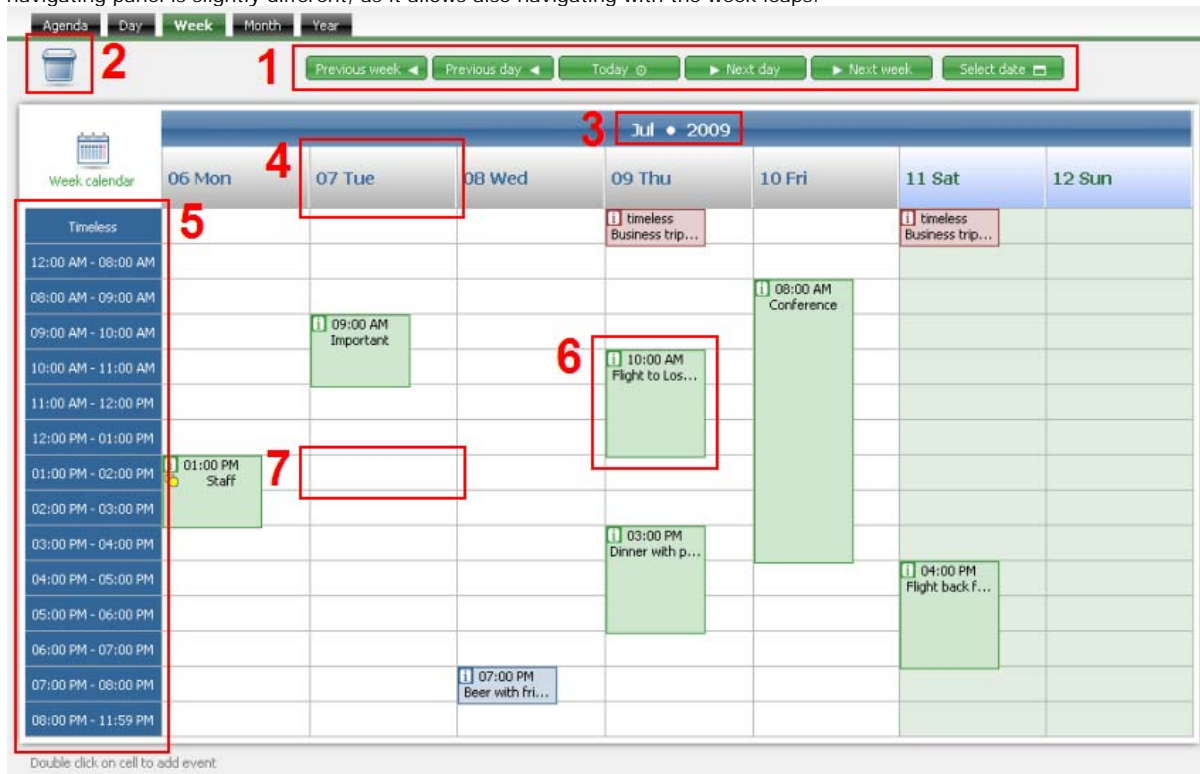
Day View displays all events of the selected day.



1. This panel helps you navigate through the dates, either by going through consecutive days ("Previous day" and "Next day") or by skipping right to the day of your interest ("[Select date](#)").
2. This space is used to delete events. [More...](#)
3. This header gives information, what day is displayed. In addition, signs of month and year serve as buttons to corresponding [Month View](#) and [Year View](#).
4. This panel contain labels that inform about exact time the cells stand for. [More...](#)
5. A cell is a basic component of the day grid. Double click on it will start a creation of a new event.
6. This is an event. It is displayed in a form of [event frame](#).

Week View

Week View is similar to [Day View](#). There are, however, two differences - events from seven, not only one, consecutive days are displayed and the navigating panel is slightly different, as it allows also navigating with the week leaps.



1. Navigating panel helps you navigate through days nad weeks. You can move by one day ("Previous day", "Next day") or week ("Previous week", "Next week"). There is always possibility to move right to the week of some other date ("[Select date](#)").

2. An easy way to delete events. [More...](#)
3. This time header informs about the month and year of the displayed week. There might be two such headers, when the week is at the edge of two months. The two labels - of month and year, both serve as buttons to [Month View](#) and [Year View](#).
4. Day headers mark consecutive days of the week. All events in the column beneath this header are of the same day. It also serves as a button to a [Day View](#).
5. Time panel marks rows with times they refer to. [More...](#)
6. A single event, displayed as [event frame](#).
7. Cell - basic component of the grid. Double click on it will start the process of adding new event with starting date and time same as these of the cell.

Month View

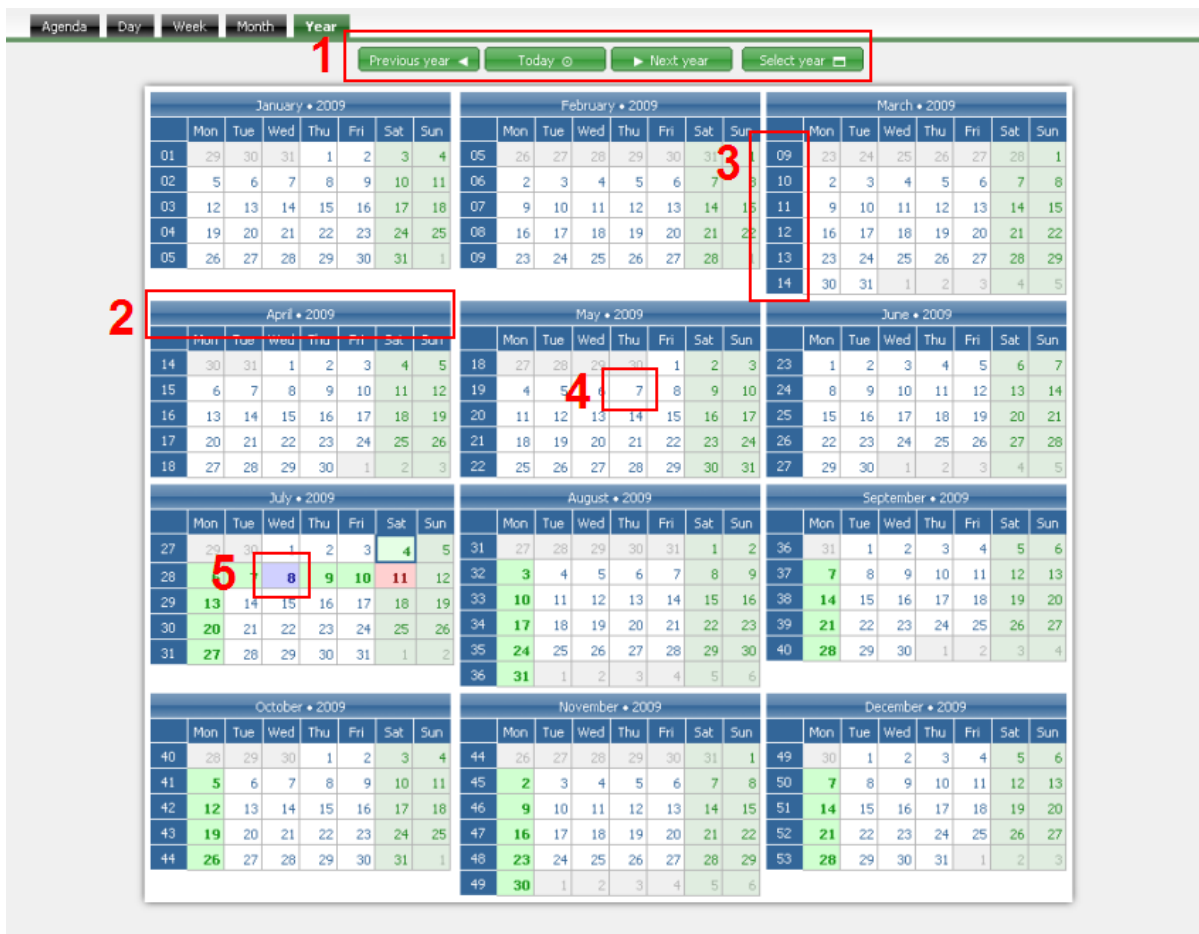
Month View displays events from selected month. It shows more events, but with fewer details.

Double click on cell to add event.

1. Buttons in this panel serve as tools to navigate through months and years, either one after the other ("Previous month", "Next month" and "Previous year", "Next year") or directly to the month of interest ("[Select month](#)").
2. This area is used to delete events. [More...](#)
3. Header of the month. The sign of year serves also as a button redirecting to [Year View](#).
4. Numbers on this panel refer to weeks. Each of these labels redirects to proper [Week View](#).
5. The events in this view are also represented by [event frames](#), however all of them have the same size.
6. A day cell - basic component of Month View's grid. Double click on it will add a new event.
7. A day label. Redirects to the [Day View](#).

Year View

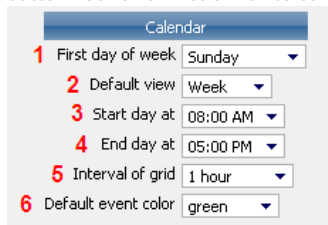
Year View is not that much precise as the prior views. It focuses on showing the days that have some events planned in the context of the whole year. You can use it also as navigating tool, as it has buttons which direct to all kinds of grid views.



1. Navigating panel, when you want to go through consecutive years ("Previous year" and "Next year" button) or just skip to another year ("Select year").
2. A month header. It works as a button redirecting to the [Month View](#) of the chosen month.
3. Headers of the weeks. Each of them, when pressed, redirects to [Week View](#) of the chosen week.
4. A cell of a day without any events. Still can be used to redirect to [Day View](#) of this day.
5. A cell of a day with some events planned (the font is bold and the background color is the same as the one of the first event of this day). It also redirects to [Day View](#).

Options

There are a few options that can be changed here. You can access them by Menu -> My settings -> Control panel and then choosing Calendar. Click button "Save" on ActionBar to save chosen settings.




1. The day of the week you want to be displayed as the first one. This option is used not only in [Week View](#) and [Month View](#), but also in [Year View](#).
2. The view that will be displayed, when you access calendar.
3. The hour at which you start your day. The earlier hours will be displayed all in one row. This applies to [Day View](#) and [Week View](#).
4. The ending hour of your day. The time after that till the end of the day will be seen in one row. This applies to [Day View](#) and [Week View](#).
5. The precision, with which the grid will be displayed. The interval determines the duration that corresponds with each row. It is used in [Day View](#) and [Week View](#).
6. The color of frames of events that have "Default" color chosen as the one to be displayed. [More...](#)

Displaying event's details

All events have a variety of settings and additional information that isn't shown while displaying schedules. You can access these details in two ways - by View Event interface or by Event Tooltip.

Event Tooltip

Date:	Sat - 07/04/2009
Time	12:00 AM - 01:00 AM
Duration	1 hour(s)
Event:	Meeting with contractors
Description:	Discuss details of the new contracts.
Assigned to	Phillips Edward
Contacts	Anderson Caroline [Contractor Company] Robinson William [Contractor Company]
Status	Open
Access	Public
Priority	Low
Notes	0
Created by:	Phillips Edward
Created on:	07/04/2009 02:00:22 PM
Click to show / hide menu	

This tooltip is visible when you hover mouse over the  icon on [event frame](#) in any of [grid views](#).

Date - the day the event is scheduled for
Time - the exact hours of the start and the end of the event
Duration - the amount of time between starting and ending hour of the event
Event - the title of the event; an outline
Description - more information about the event (text)
Assigned to - people from your company directly involved in the event progress
Contacts - customers, contractors or other people who take part in the event or are interested in it.
Status - informs about the stage in which event is. [More...](#)
Access - how and by whom the event might be accessed. [More...](#)
Priority - tells how important the event is. [More...](#)
Notes - the number of notes that are attached to this event
Created by - the date and time of event's creation
Created on - person who created the event

View Event interface

You can access this interface in a few ways. From [Agenda](#) - by clicking on the title of the event's title. From [grid views](#) - by using [event frame](#), either by clicking on the time panel or by choosing "view" from actions.




1. This panel contains a few useful [actions](#).
2. Title - an outline of an event, its definition.
3. Description - contains more detailed information about the event.
4. Employees - people who are directly and actively involved in the event from the side of company.
5. Timeless - gives information whether event is timeless or not.
6. Access - the way the event can be accessed across the system. [More...](#)
7. Priority - tells how important the event is. [More...](#)
8. Color - the color connected with the event. This color is used to display event frame in grid views. [More...](#)
9. Status - the information about in which state the event is ([More...](#)). This interface allows changing of status by simply clicking on it. Clicking on "Open" will change it to "In Progress" and clicking on "In Progress" will change it to "Closed" or "Canceled" (depending on user's choice).
10. Customers - the list of people who are connected with the event, but don't take active role in it or are from outside of the company.
11. Recurrence - informs whether event is repeatable. On the picture above - it is not. [More...](#)
12. [Notes](#) and [Alerts](#).

Event's attributes

There are a few attributes of events that require detailed description. These are: Access, Priority, Color and Status.




Access

Access indicates the type of permission to view and change the event. There are a few options possible:

-  "Public" - everyone may see the event, read and change the event's details.
-  "Public, Read-Only" - everyone may see event and it's details, but only users assigned to the event may change it.
-  "Private" - only users assigned to the event may see or change it.

Priority

This attribute says how important the event is. The priority might be set to three different values:

-  Low
-  Medium
-  High

Color

Color is a basic attribute of every event. Is is used mainly by grid views while displaying event frame. It also influences the color of the day in [Year](#)

[View](#). You can use it as a tool to mark different types of events. Recurring events have the same color for every occurrence. There is a variety of colors the event can take: [green](#), [yellow](#), [red](#), [blue](#), [gray](#), [cyan](#) and [magenta](#). Event can also have "default" color chosen. "Default" color is set per user (this can be set in [Options](#)). All events that have "default" as a color will be displayed for you with the color you choose as your "default".

Status

This attribute informs about the progress of the event. There are four possible stages:

- ● "Open" - the event hasn't started yet
- ● "In Progress" - the event has already started and is still running
- ● "Closed" - the event has ended
- ● "Canceled" - the event has been canceled

Recurrence

This icon displayed on an [event frame](#) or near the event's title in [Agenda](#) means that the event is repeatable. It is scheduled to recur once in some certain time, for example - on Mondays or every 14th day of the month.

In the [View Event](#) interface you can find more detailed information about the recurrence of particular event.

Recurrence event	<input checked="" type="checkbox"/>	1
Recurrence interval	once every week	2
No end date*	<input checked="" type="checkbox"/>	3
End date*	11/02/2009	4

1. This field displays the information whether event is recurring or not.
2. The recurrence interval. Possible options are:
 - everyday
 - every second/third/fourth/fifth/sixth day
 - once every week
 - few times every week (for example on Mondays, Tuesdays and Thursdays)
 - every two weeks
 - every month
 - every year
3. Indicates if there is an end date for this recurring event
4. The end date for the recurrence.


Adding and editing events

Adding

To add a new event you can simply click "Add event" button (on the picture) and then [fill the data](#). Other way of starting event creation is by using [Grid Views](#). Double clicking on a cell in [Day View](#) or [Week View](#) will direct you to [filling form](#) with date and time filled with the data based on the time and date of the cell. Clicking on a cell in the [Month View](#) will give similar effect - the date of the new event will be the same as the one of the cell.

Editing

To edit an event you need to access the [filling form](#) and change there the fields of interest. There are a few ways to access this form:

- From [Agenda](#) - choose the "Edit" option from [actions](#) available for the event.
- From [Grid Views](#) - click  icon on the right [event frame](#), and choose "Edit" from available [actions](#).
- From [View Event](#) interface - while viewing the event use "Edit" button from Action Bar (on the picture)

Cloning

If you want to create an event very similar to the one that already exists, you can use cloning function. To do this, enter a [view](#) of the event you want to copy, and click "Clone" button from Action Bar (on the picture). It will redirect you to a [form](#) filled with the cloned event's data. To proceed enter and save the changes.

Note: the original event won't be changed during cloning.

Filling data form

1. The name of the event, may contain a short information regarding the event.
2. Description of the event, containing more detailed information, for example a short list or agenda.
3. List of people directly involved in the event, in a form of multiselect.
4. Recurrence options. *TO DO LATER*
5. Time options. Here you set detailed information about the event start, end or duration.

button.

If you don't want to determine the exact time of the event you are creating or editing, check "Timeless" option for it.

6. Here you can set event's attributes: access, priority, color and status. More detailed information about these fields you will find [here](#).
7. Customers' selection. Here you can choose all customers that are connected with the event by using auto-multi.
8. Setting alerts. [More...](#)

When you fill the data you can see two buttons on the Action Bar: Save and Back.

If you want to save the changes you've made (or the new event), click "Save" button to confirm them.



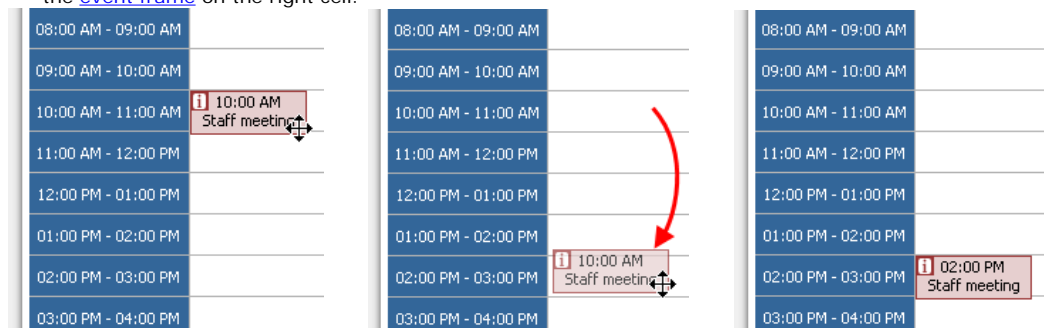
If you want to abandon the changes you've made (or the new event), click "Back" to reverse them.



Moving



If the only thing you want to change in the event is its time or date (but not duration), you can do this by moving the event. You can do this from any [Grid View](#).

- In a [Day View](#) you can change only the start time of the event. To do this, drag and drop the [event frame](#) on the right cell.
- In a [Week View](#) you can change both start time and date of the event. However it has its limitations - you can choose only the date from the same week event already is. To do this, drag and drop the [event frame](#) on the right cell.
- In a [Month View](#) you can change only the date of the event and only if it is in the same month the event already is in. To do this, drag and drop the [event frame](#) on the right cell.

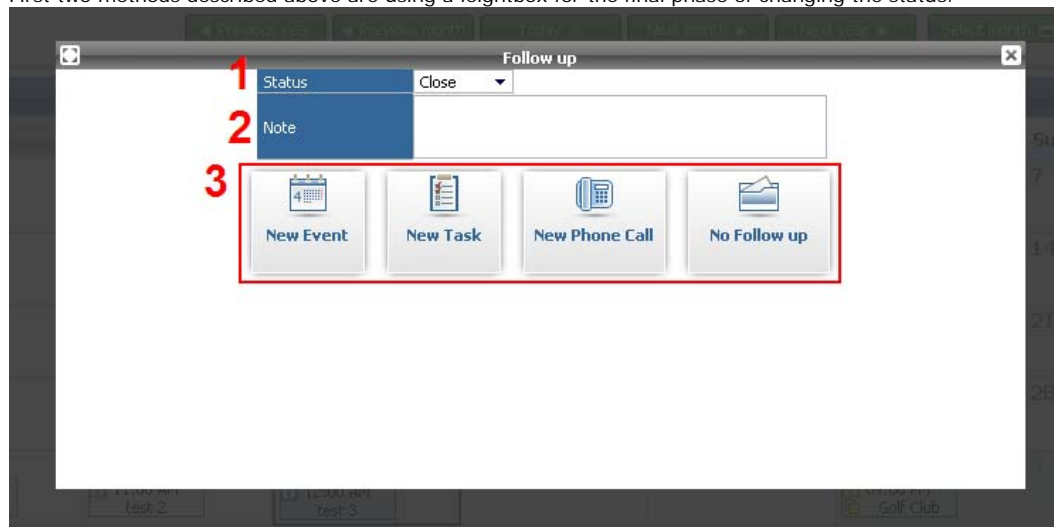


Closing / cancelling

When the event is over and you finished working on it, you may want to mark this event as "closed". If the event didn't happen or was called off, you may want this event marked as "canceled". Both these status changes you can do in a few similar ways:

- While in a one of [Grid Views](#) - click on the  icon on the chosen [event frame](#) then click on the action button "close" (). This will direct you to a leightbox (described below).
- From the [View Event](#) interface. To change the status from "Open" to "Closed" or "Canceled", first change the status to "In Progress" by clicking "Open" sign in "Status" field. To change status from "In Progress" to "Closed" or "Canceled", click "In Progress" sign in "Status" field. This will result in displaying a leightbox (described below).
- By [editing](#) the event - change value of "Status" field to "Closed" or "Canceled" (choose the right option from the select).




First two methods described above are using a leightbox for the final phase of changing the status.



1. Status selection - here you choose whether you want to close or cancel the event.
2. Note - here you can write some comments.
3. Follow ups - in order to continue you have to click one of these. The default value is "No follow up" - click this button if you only want to close/cancel the event. Other options allow you creation of a new event, task or phone call using the data of the event being closed/canceled.

Deleting events

To delete an event you need first to display it, either in [Agenda](#) or in one of the [Grid Views](#) and then:












- From [Agenda](#) - click  icon form the "Actions" field corresponding with the event.
- From any of [Grid Views](#) - click  icon on the [event frame](#), then click .

After that you will see a confirmation box. Click "OK" to succesfully finish deleting process.

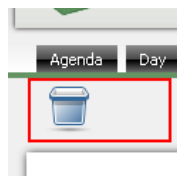
Interface details

Actions

Actions are as follows:

-  View event's details
-  Edit event's details
-  Delete event
-  Change the date of the event - clicking on this will display a [small calendar](#), where you can choose any date.
-  Close event - you can use this to mark that the event has ended or was cancelled.
-  /  These icons indicate whether or not the event is subscribed, i.e. whether you will be noticed if the event is changed. Green one means, that you subscribe the event and clicking on it will unsubscribe the event. Opposite, gray one says that event isn't subscribed and clicking on it will start subscription.
-  This is an information icon. By hovering mouse over it you will see additional information about the event, like time of creation and last edition and who created and edited it.
-  Adding a new event - follow up to the displayed one.
-  Creation of a new task - follow up to the displayed event. Appears only if the "Tasks" module is installed.
-  Creation of a new phone call - follow up to the displayed event. Appears only if the "Phone Call" module is installed.

Deletion area



This area, marked with the icon of dust bin, serves as a simple method of deleting events. It is used in all views with event frames: [Day View](#), [Week View](#) and [Month View](#). To delete particular event, just drag and drop event frame on this spot.

Time panel

Timeless	This panel contains labels that indicate the time of the day which is represented by the cells next to them. It is used in Day View and Week View . There are several types of labels here, each of them should be interpreted in a slightly different manner.
12:00 AM - 08:00 AM	Timeless This label marks that events in the same row are "timeless". This means that there is not specific time of their start and end. It appears only once for one time panel, always on top of it.
08:00 AM - 09:00 AM	12:00 AM - 08:00 AM This label, which is always right after "Timeless", marks the row that contains all the events that happen before the "start of the day". The time of this start may be changed in Options . There is always only one such label for a time panel. It is placed between "timeless" label and the standard ones.
09:00 AM - 10:00 AM	
10:00 AM - 11:00 AM	03:00 PM - 04:00 PM This is typical label of time panel. All of them have the same time span. Here it is one hour, but this can be changed to different values in Options . The duration of the event might be, of course, longer than the duration of one of such labels. Event frame is then situated in more than one cell.
11:00 AM - 12:00 PM	
12:00 PM - 01:00 PM	08:00 PM - 11:59 PM This label is next to the row, which contains all the events that happen after the "end of the day". Exact time of this "end" can be set in Options . This label is always at the end of time panel. There could be only one such label in one time panel.
01:00 PM - 02:00 PM	
02:00 PM - 03:00 PM	
03:00 PM - 04:00 PM	
04:00 PM - 05:00 PM	
05:00 PM - 06:00 PM	
06:00 PM - 07:00 PM	
07:00 PM - 08:00 PM	
08:00 PM - 11:59 PM	

Small calendar

This tool is very usefull when selecting date, month or year, which is not near the current or currently displayed one.

<< July 2009 >>						
Mon	Tue	Wed	Thu	Fri	Sat	Sun
		1	2	3	4	5
6	7	8	9	10	11	12
13	14	15	16	17	18	19
20	21	22	23	24	25	26
27	28	29	30	31		

This is **view of the month**. It is used to choose the day. From here you can select the date, by clicking on a proper number. You can also choose a day from another month. To do so, you need to change view to the month of interest. Simply navigate with the arrows located in the to right and top left corner of the small calendar frame. There is also another method - using view of the year you can directly choose the month from the displayed year. To go to that view - click on the name of the month.

<< 2009 >>		
January	February	March
April	May	June
July	August	September
October	November	December

The **view of the year** serves to select months. To do so, click on the name of the right month. If you need month from another year, you can navigate through years by using arrows located in top left and top right corner. You can also display wider range of the years to choose from by clicking on the name of the year. It will redirect you to view of decade.

<< 2000 - 2010 >>		
1999	2000	2001
2002	2003	2004
2005	2006	2007
2008	2009	2010

View of the decade shows ten consecutive years. You can choose a year by clicking on the proper number. If the year of interest is not in the displayed decade, you can navigate to next and previous decades by using arrows from the top panel.

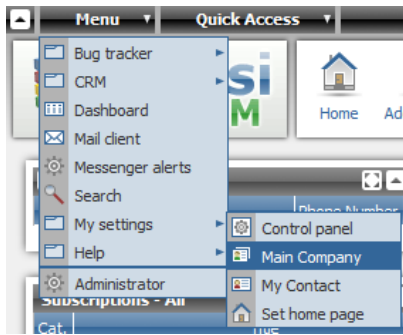
Administrator's Guide

Creating New Users

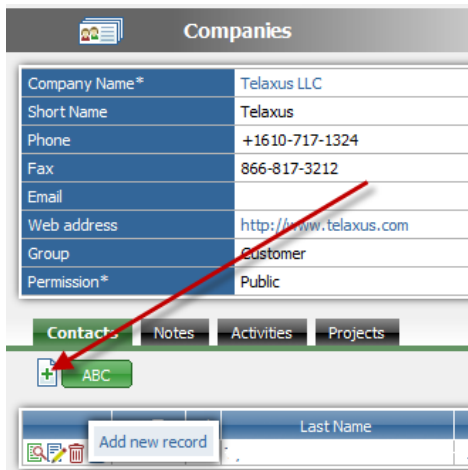
A user is a contact that belongs to the Main Company and has login rights. Only administrators have rights to create new users.

The simplest way to create new contact login is to:

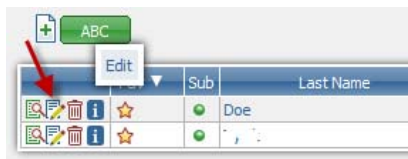
1. Open Main Company with listing of all contacts: Menu -> My Settings -> Main Company



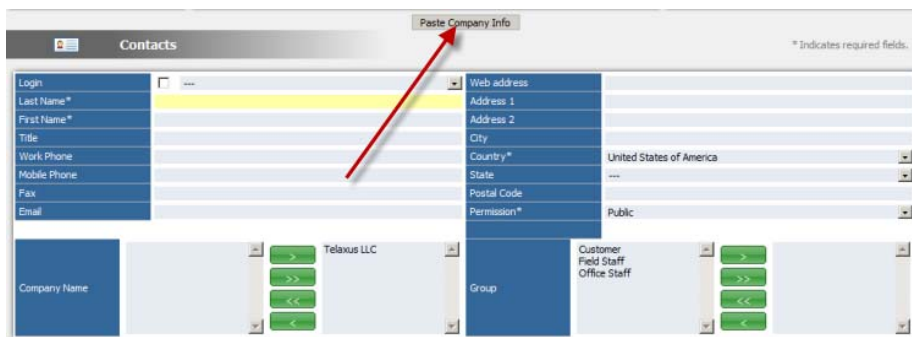
2. Under Contacts Tab click on '+' sign - Add new record (new contact).



If the person is already listed as a contact just edit it:

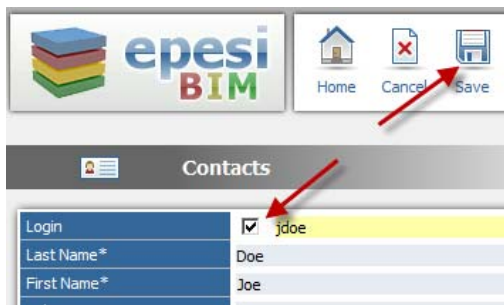


3. If creating new contact you can save some time filling out the form with "**Paste Company Info**" button located on the top. This will pre-fill address, phone number, etc. from data stored under Main Company record. Later you can modify fields as needed. **Make sure that you will provide a correct e-mail address.**

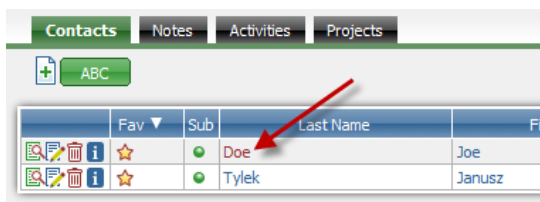


4. Finally enter **Last Name**, **First Name** and desired **login**. If editing an existing contact just click on "login" checkbox and provide desired login.

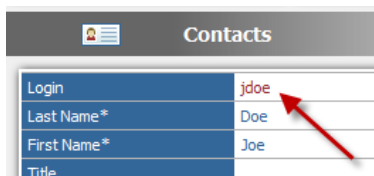
Once the checkbox "login" is selected the login field becomes a text field. A common practice is to use the first letter initial and last name as login, in this case for Joe Doe we create a login 'jdoe'. Finally click **Save**. A contact and the epesi user was created in one step. Please note, that the **password is randomly generated** and an e-mail is automatically sent to that contact with login information.



5. After saving the record you will be redirected back to the Main Company page with listing of Contacts. Open this contact again by clicking on the Last Name link (or view action icon):



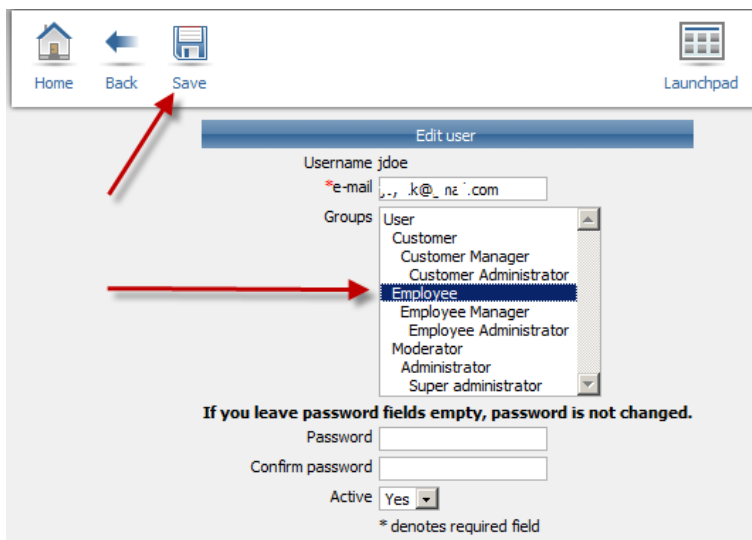
6. Now in the Contacts module viewing this person record click on the **Login** link to adjust proper access rights:



7. Here you will specify access level by assigning this user to a group. The default group for all newly created users is just '**User**'. For all employees the minimum access level should be "**Employee**" group. While this may seem not very logical, it is necessary to verify and/or adjust access level to avoid access to unauthorized data in the system.

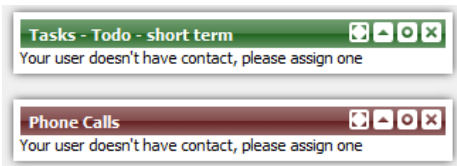
A user can belong to multiple groups - for example: Employee and Administrator. To assign multiple groups hold **CTRL** key on the keyboard while making a selection with the mouse.

Finally click on **Save**.



If needed you can specify a password here, however an e-mail with the login information and link to the site was already generated by the system and you will need to notify the user about the new password.

Note: epesiBIM allows to have a user (login) without the associated contact. This option may be useful for someone who acts as an outside consultant or an administrator, but is not considered an employee of the Main Company. A user with just a login but no associated contact will see a warning in applets: "**Your user doesn't have contact, please assign one**"



Deleting a User

Changing Logo