



Conflux

Conflux Professional

User Guide

v 1.2

Index

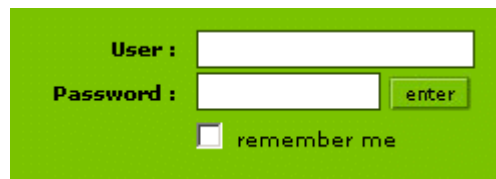
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1. General

1.1 Logging in

To log in to Conflux Professional the users have to enter their user name and password. The "remember me" check box stores the user authentication information to your computer if checked so Conflux will not ask to log in next time. This setting will effect until an user chooses to log out from the system by clicking the "log out" button. To keep this setting an user has to exit the system by closing his browser window.

A screenshot of a login form with a blue background. It features two input fields: "User :" and "Password :". To the right of the "Password :" field is a small blue button labeled "enter". Below the "Password :" field is a checkbox labeled "remember me".

Picture: Example of a log in form.

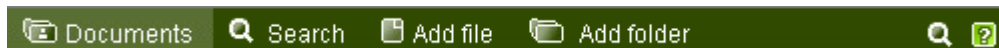
1.2 Logging out

To securely log out of Conflux, the user has to click on the Log Off button at the bottom-left of the screen. Closing the browser window might leave Conflux sessions active, which means that the next time the computer is used to access Conflux, it will not prompt for a user name and password, but will continue the old session.

1.3 Top-level menu

The top-level menu has three purposes:

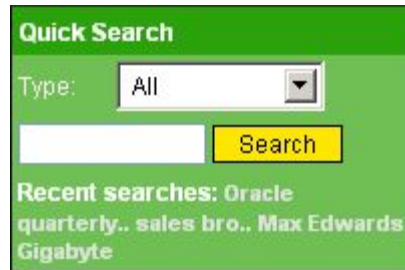
- It allows the user to navigate through the different functionality of the selected module by clicking on the tabs displayed.



Picture: Example of the top-level menu.

- It allows the user to bring up the online help module by clicking on the question-mark icon.

- It allows the user to bring up a quick search menu and perform a search over selected data types by clicking on the looking-glass icon. Up to eight of the latest quick searches are automatically stored and displayed as quick links under the "Recent searches" section. To use the quick search, click on the keyword(s) with your mouse.



Picture: Example of the quick search form.

1.4 Notes

Notes are good way to store data and history about objects in Conflux since most types of objects in the Conflux server can have notes added to them. Notes are public so they are visible to everyone.

Adding a note: Click on the "Add" button to open the "Add a note" form. Fill out the text form and click on "Save". A note has been added.

Changing notes contents: Click on the note creators name to open the "Edit note" form. Fill out the text form and click on "Save". The note has been changed.

Deleting notes: Click on each checkbox in the corresponding rows of notes you want to delete and then click on the "Delete selected" button.

NB! Changing and deleting notes is only possible if you are the author of the note.



Picture: Example of the note list.

1.5 Relations

Relations is the key for keeping connections between the objects in Conflux. Almost every type of object in the Conflux server can be connected to other objects through relations. To view object relations, open the object view form and click on the "Relations" tab. A list of relations is displayed, grouped by the relation type. To add a new relation, decide which type of object you want to connect to this object and click on that types "Add" or "Choose" button. The "Add" button allows the user to add a new object of this type which will be connected. The "Choose" button allows the user to select a pre-existing object for the connection.

Sales Opportunity: 15 Gigabyte G-Max Laptops

Info Relations (10) Notes (7) Log

Relations

Documents Add Choose

Name	Owner	Created on	Edited on	Action
Contract	Indrek Järve	07/28/2004 12:04	07/28/2004 17:27	Edit Del
Gigabyte G-Max Brochure	Angelina Patric	07/28/2004 17:25	07/28/2004 17:25	Edit Del

Events Add Choose

Name	Owner	Created on	Edited on	Action
E-Consumer: Negotiations	Angelina Patric	07/28/2004 17:19	07/28/2004 17:19	Edit Del

Tasks Add Choose

No records specified.

Contacts Add Choose

Name	Owner	Created on	Edited on	Action
Fred Astair	Angelina Patric	05/14/2004 15:35	07/26/2004 15:39	Edit Del
Jefferson Papay	Angelina Patric	05/14/2004 15:35	07/26/2004 15:48	Edit Del

Workflows Add Choose

No records specified.

Clients Add Choose

Name	Owner	Created on	Edited on	Action
Dobbystyle	Max Davis	05/30/2004 15:25	07/26/2004 09:46	Edit Del
E-Consumer	Max Davis	05/30/2004 15:26	07/26/2004 09:49	Edit Del

Opportunities Add Choose

No records specified.

Products Add Choose

Name	Owner	Created on	Edited on	Action
Gigabyte G-Max	Angelina Patric	07/15/2004 08:40	07/27/2004 10:03	Edit Del
Gigabyte G-Max N-501	Angelina Patric	07/15/2004 08:40	07/27/2004 10:03	Edit Del
Gigabyte G-Max N601	Angelina Patric	07/20/2004 11:46	07/27/2004 10:04	Edit Del

Picture: Relations View.

1.6 Log

All changes made to objects in the Conflux server are logged for historical and review purposes. To example an object's change log, enter the object view form and click on the "Log" tab. By default, a compact list of users who changed the active object is displayed. To see more details about the specific change, click on the appropriate "Show Details" button. To show all changes, click on the "Show all" button.

Product: Gigabyte G-Max

[Edit Product](#) [Relations \(1\)](#) [Notes \(0\)](#) **Log** [Reports](#)

Log: Gigabyte G-Max [Show All](#)

Modified by: Angelina Patric **Modified on:** 07/28/2004 17:48 [Hide Details](#)

Field	Old Value	New Value
Price	1540.00	1520.00

Modified by: Angelina Patric **Modified on:** 07/27/2004 10:03 [Show Details](#)

Modified by: Angelina Patric **Modified on:** 07/27/2004 09:58 [Show Details](#)

Modified by: Angelina Patric **Modified on:** 07/27/2004 09:40 [Show Details](#)

Picture: Log overview.

1.7 Ordering lists

Most of the objects lists in Conflux (documents, e-mails, etc.) can be ordered according to user preference. In order to re-order a list one must select a column and click on its header.

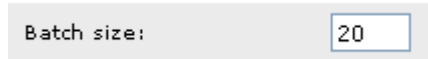
F	N	From	Subject	Date ↓	Size	<input type="checkbox"/>
---	---	------	---------	--------	------	--------------------------

Picture: E-mail list ordered by date in descending order.

The arrow next to the column header indicates column used for ordering the displayed list. An arrow pointing up means ascending order, an arrow pointing down means descending order. To change the the order of ordering one has to click on the same header again.

1.8 Dividing lists into multiple pages

Conflux has a built in support for dividing (long) lists into multiple pages. Every user has its own setting called „batch size“ which can be modified under **Admin->Settings**.



Picture: Example of batch size:

The batch size defines the maximum number of items to be displayed on one page. If the list size exceeds the batch size, Conflux will show only the first 20 items on one page and creates a batch-bar under the list which contains links to the rest of the list.





« Previous 20 items 1-20 21-40 **41-60** 61-80 81-100 Next 20 items »

Picture: Example of a batch-bar

The current page is marked in bold, e.g. 41-60 in this example.

1.9 Marking and unmarking items

Most lists shown in Conflux have a check box in the rightmost column.

 Cesar Baquerizo	[Confluxlite] (no subject)	14.10.2003 18:54 2.0KB	<input type="checkbox"/>
 Emer Värk different.ee	Re: conflux	14.10.2003 01:34 1.0KB	<input type="checkbox"/>
 Emer Värk different.ee	conflux	13.10.2003 21:56 2.0KB	<input checked="" type="checkbox"/>
 강윤식	[Confluxlite] question about discution & e-mail menu	30.09.2003 09:03 4.0KB	<input type="checkbox"/>

Picture: Example of a list with check boxes.

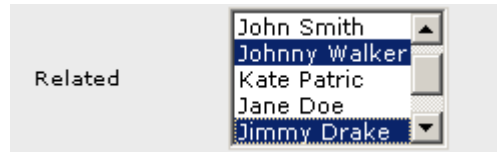
This check box can be checked or empty. If the check box is checked then the item on the check box row is „marked“. To mark an item one has to click on the items check box. Second click on the check box removes the mark.

Marking itself does nothing but is required for performing different actions with the selected items, for example deleting documents or moving e-mails into another e-folder. When you press „Delete selected“ button, it will delete only the selected (marked) items. This applies to most other buttons as well. In other words, marking is a convenient way to perform a specific action on multiple items.

In most lists it is possible to mark/unmark all items with one click. There is a check box in the header row, which marks/unmarks all items in the current list page upon clicking.

1.10 Selecting from the multiple selection box

Some forms contain fields with multiple selection boxes. For example related persons on the "Add new task" form.



Picture: Example of a multiple select box.

This indicates that a user can select multiple items from these lists. Selected items are marked with a dark background: in this example, Johnny and Jimmy are selected. To select multiple items, the user must hold the CTRL key down and then click on the wanted items. If clicked without CTRL the previous selection becomes void and only the clicked item remains marked. Clicking with CTRL key down on the selected items removes the selection one by one.

2. Desktop

2.1 Menu: Overview

After logging in to Conflux, the user is directed to the Conflux front-page, which gives a brief overview of the most important information. The overview section is divided into five tabs.

The tasks tab:

This tab displays tasks, which are already overdue or due on the current day. Overdue tasks are marked red.

The calendar tab:

The calendar tab gives an user a quick overview of his events occurring on the current day and the day after that.

The notes tab:

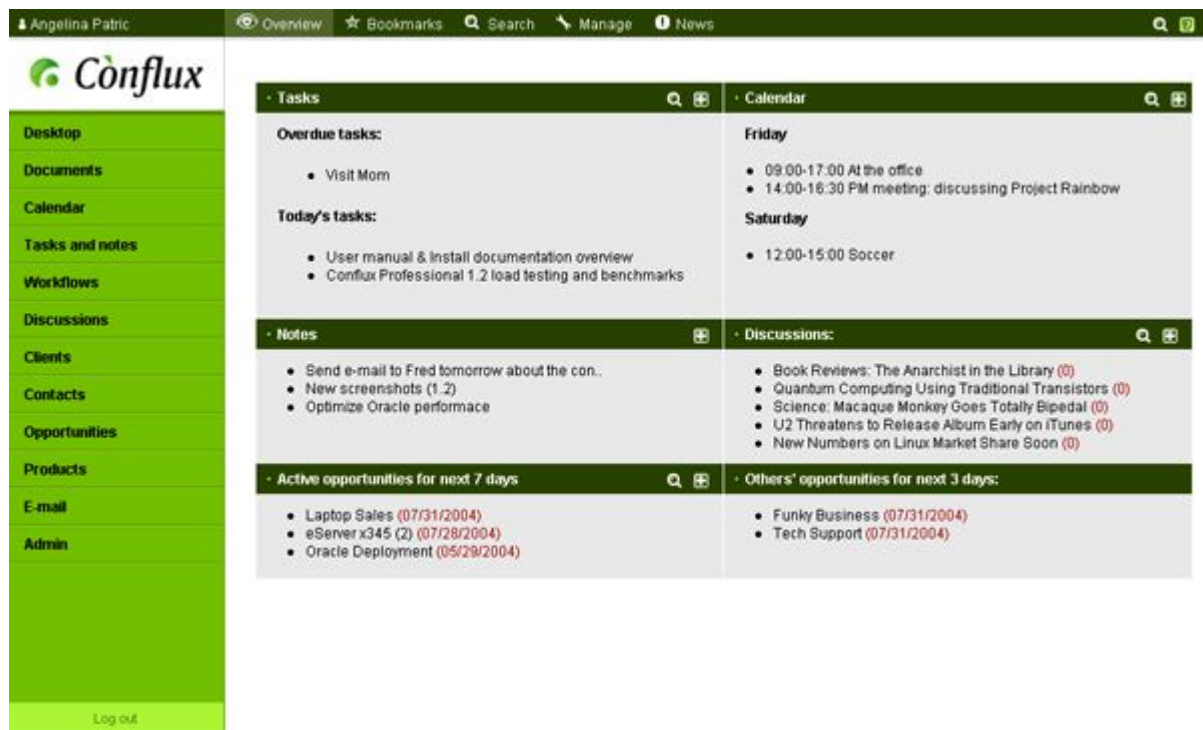
The notes tab shows the latest personal notes a user has entered.

The discussions tab:

The discussions tab shows the titles and links to the recently added discussion threads.

The announcements tab:

The announcements tab is fully customizable by the Administrators and is generally used for organization-wide information bulletins.



Picture: Example of a Desktop

2.2 Menu: Bookmarks

The bookmarks module contains public and private bookmarks. Bookmarks can be created by any user. If the bookmark is marked as private, then it is visible only to its creator. Otherwise it can be seen by all users under the same organisation. By default Conflux will show personal to the user. To see the public bookmarks, the user has to click on the „Public Bookmarks“ tab.

Bookmark categories: bookmarks are collected into user-created categories to ease management and data overview. Categories can be added by clicking on the “Add bookmark” tab and using the “add a category” form.

Exporting bookmarks: a user can export his/her, public or all (both user's private and public) bookmarks by clicking on the “Export/Import” tab and using the “Export form”. The “Format” parameter defines the output format of the export – “HTML” format can be imported by the Mozilla and Firefox browsers and “Opera (.adr)” format can be imported by the Opera browser.

Importing bookmarks: a user can import bookmarks exported from Opera, Mozilla and Firefox browsers. To import bookmarks, click on the “Export/Import” tab, and in the “Import” form select the exported bookmark file from your computer. Once the file is selected, clicking on the “Import” button will initiate the import of those bookmarks. Note that all imported bookmarks will be marked as private.

2.3 Menu: Search

The search module is the most powerful search tool in Conflux. It uses Full Text Indexing on object meta data and can find almost all Conflux objects from any module. It can also search from the contents of files. By default the system will search from all Conflux modules, this can be modified by altering the selection in the „Search in“ field.

Search in objects data: If checked then the search will try to find a match in objects meta data (title, author, description, etc.).

Search in objects contents: If checked, the search will look into file and e-mail contents for a match.

Full text indexing keywords can be matched on partial words, but cannot be shorter than three characters.

3. Document Management

To enter the document management module one has to select „Documents“ from the left menu.

General picture:

Upon entering the document management module, the user is shown a screen which is divided into two distinct parts: to the left is the Document Tree, which makes it easier to navigate in the system and to the right are different views related to documents. By default the user is shown the Documents view.

3.1 The Document Tree

The Document Tree displays the organisations, sub-organisations and document folders visible to the user. Tree nodes can be opened and closed by clicking on the plus and minus signs. Clicking on the organisation or folder name opens the organisation or folder contents view on the right side of the screen.



Picture: Example of a document tree.

3.2 Menu: Documents

The Documents view shows the contents of an active folder. The content may contain sub-organisations, folders and files. By default the list is sorted in alphabetic order. Documents and folders can be renamed, copied and deleted. For each of these actions there is a button below the document listing.

Cut – Selected documents and folders will be cut for pasting into other folders. In order to paste the user will have to go into the destination folder and click the „Paste“ button.

Copy – Otherwise like cut with the exception of the original documents and folders remaining in their location after pasting them to another location.

Rename – Allows to change the name of the selected item. Only one item can be renamed at a time.

Delete – Deletes the selected documents and folders.

3.3 Organisation-, Folder- and Document information

Every item (organisation, folder, document) in documents view has an icon in front of its title. A house for organisation, a folder for folder and different icons for documents depending on the type of the document. Clicking on the icon opens the object information tab. For organisation the system will display information about the organisation: address, telephone and so on. For folders the system will also allow the user to change the folders comments.

Document information form:

The document information form is divided into five tabs:

- **Info** tab displays document meta data, such as Author, Creator and Size. Also of importance are the buttons below the information form:
 - **Edit file meta data** allows the user to change file meta data
 - **Load new version** allows the user to overwrite the document with a new version of the file. The older overwritten versions will be stored under the "Versions" tab for history.
 - **Lock document** allows the user to lock the document for a certain time so only this user can edit the document during the period of the lock.
 - **Unlock document** allows the user to unlock the document. If the user is not the same user that locked the document, the user will have to have "manage" access to the organization to override the lock.
 - **Edit file contents** allows the user to edit text files through the browser.

Path: /TestCompany Ltd./Sunset.jpg

Info	Versions	Relations (0)	Notes (0)	Log
Title:	Sunset.jpg			
File name:	Sunset.jpg			
Author:				
Creator:	John Doe			
Created on:	07/23/2004 13:30			
Category:				
Editor:	John Doe			
Edited on:	07/23/2004 13:30			
Size:	70KB			
Description:				
Comments:				
Edit file metadata		Load new version		
Lock Document				

Picture: an example of a document information form.

- **Versions** tab displays the current (marked in bold) and older versions of the document. The older versions can be downloaded by clicking on the respective version's file name column.
- **Notes** tab: see Section 1.4 (Notes)
- **Relations tab: see Section 1.5 (Relations)**
- **Log** tab: see Section 1.6 (Log)

3.4 Menu: Search

The document search form offers the functionality of finding documents quickly and conveniently. The search tab is divided into two: a simple Search form and an Advanced Search form. The simple search form is displayed by default, clicking on the „Advanced Search“ link switches the forms.

Simple search:

Allows to search documents by unified keyword search over document meta data.

Advanced search:

Advanced search allows the user to define clear parameters for document searches and also allows the user to search in document contents.

3.5 Menu: Add file

This form allows the user to add new files into the Conflux Document Management. The user can choose between two different upload methods: Simple upload and Advanced upload. By default the simple upload form is selected. To change the upload method to the advanced one, the user must click on the „advanced upload“ link. Advanced upload lets the user to describe the uploaded file in more detail. To add a file the user must first click on the browse button and locate a file on his/her computer. After the file is selected, the user can fill out the meta data required and click on the „Save“ button. The upload can take anywhere from a few moments to several minutes depending on the size of the file and the Internet connection speed of the user. After a successful upload the user will be notified about it and then redirected to the documents list.

3.6 Menu: Add folder

Creates a new folder with a user specified name to the document management. Additionally the user can specify the folder or organisation under which the new folder will be created.

4. Calendar

4.1 Overview

Calendar is for organising time, planning meetings and managing shared resources. It helps the user to get a better overview of their time tables and can be used for reminding as well. Additionally to personal time management, Conflux Professional supports shared time management.

Conflux calendar is designed to be used primarily as a shared calendar, but it can be used for private time management also, without anyone but the user seeing information about the event.

In the groupware context the calendar can be used for delegating tasks to group members and for reporting the progress and results of projects.

Calendar is divided into a four views: daily, weekly, monthly calendar views and the search form. It also has a quick link for adding a new calendar event.

4.2 Daily calendar:

Daily calendar view displays the events of the selected day. The selected day is displayed at the top of the calendar. Selected month and year are shown on the mini calendar at the top right of the screen. By default the selected day is the current day.

On the left side of the screen the hours layout is displayed. The events are displayed next to them in boxes. The placement and the size of the event box shows the events' start times and duration. For example an event which starts at 11:00 and ends at 14:00 is displayed in a box with the upper edge at 11:00 and lower edge at 14:00. This generally applies to all events with the exception of events with a very short duration or a very long title. Moving the mouse cursor over the event box shows the events' exact start and end time and description. Clicking on the event box opens the event edit form.

4.3 Menu: Add

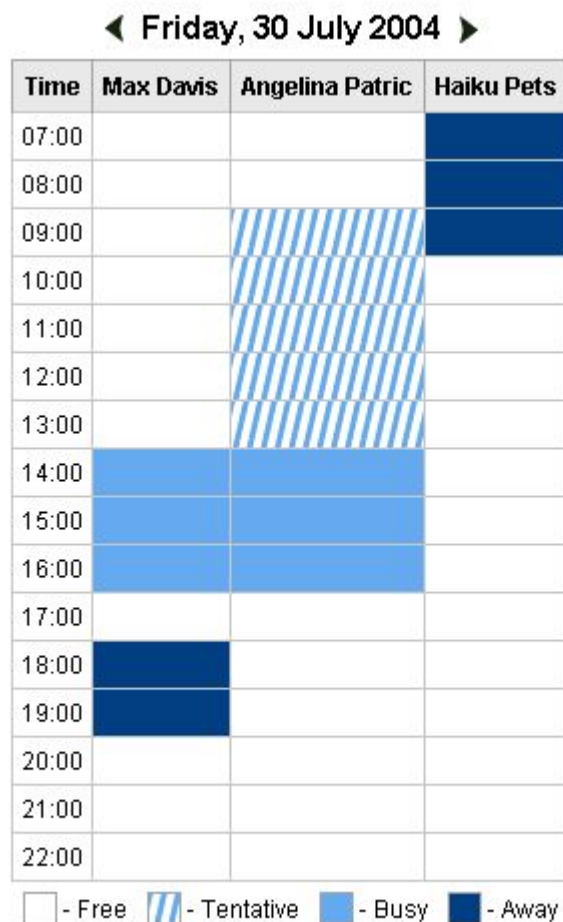
New events can be added to the calendar from the daily, weekly, monthly calendar views and from the menu under „Add“ button. In the daily calendar view, an event can be added by clicking on the time column. E.g. when clicked on 12:00 an event window opens with start time pre-set as 12:00. The pre-set date is the selected date, which can be changed by clicking on the mini-calendar icon and selecting another date. An event can be created as public or private. If the "private" check box is marked, then only the owner of the event can see its details. Also, when adding an event, the user has an option for setting a reminder. Currently Conflux supports e-mail and SMS reminders which means that Conflux can send a reminder message to the users related with the event before its start time.

NB! Conflux can only send out reminders when the required e-mail addresses and/or cell phone numbers are set under **Admin->My info**. If these fields are empty then the users will not get a reminder.

Adding relation information:

- **Persons** – to invite other users to the event, click on "Show relations" to activate the relation view and then click on the "Invite persons" button. A new window will be opened where you can add new persons by marking the checkboxes next to their names and clicking on the "Add" button. To finish managing related persons, click on the "Save & Close" button.
- **Contacts** - to assign contacts to the event, click on "Show relations" to activate the relation view and then click on the "Contacts" button. A new window will be opened where you can add new contacts by marking the checkboxes next to their names and clicking on the "Add" button. To finish managing related contacts, click on the "Save & Close" button.
- **Groups** – groups are custom collections of persons (see section 4.10). To assign groups to the event, select the needed groups (see section 1.10 for a tutorial on working with selection boxes). If you have not created any groups, this selection box will not be displayed.
- **Resources** – to assign a resource to this event, select it in the selection box (see section 1.10 for a tutorial on working with selection boxes). If no resources are visible to you, this selection box will not be displayed.

Scheduling: to determine if any of the users you have assigned to the event have any openings in their schedule, click on the "Scheduling" tab. A new window will be opened that will display the daily schedule for the people added as related to the event. To move forwards or backwards a day, click on the arrow icons next to the date in the top part of the window.



Picture: Example of a scheduling.

4.4 Select others:

Clicking on the "select others" button below the mini calendar under daily, weekly, and monthly calendar views opens a screen with two multiple selection boxes. The purpose of "select others" form is to let the users modify the information they see in their calendar views. The left selection box contains persons who are included in the users calendars. The right selection box contains all other visible persons the users can include in their calendars. To move persons from one box to another, the user will have to select the persons from one box and press the arrow-button pointing towards the other box. The system supports moving multiple persons at once.



Picture: Example of a select others selection box.

4.5 Weekly calendar:

Weekly calendar view gives the user a quick overview of all events scheduled for the selected week. The contents of an event can be seen similarly to the daily calendar view – by moving the mouse cursor over its title.

To add an event from the weekly calendar view the user will have to click on the day header. Mini calendar at the right of the screen allows the user to change the selected week.

4.6 Monthly calendar:

Monthly calendar view gives a compact overview of the selected months events. Seeing the contents of an event is analogical to the daily and weekly calendar views – moving the mouse cursor over the events title. New events can be added by clicking on the date header.

Selecting a new day from the mini calendar redirects the user to the daily calendar view, since the monthly view will not be changed when another day from the same month is activated. To get an overview for another month the user can change the month from the mini calendar. The left arrow redirects to the previous month, the right arrow to the next month. Plus and minus signs will change the selected year.

4.7 Menu: Search

The best way to find an event quickly is to search for it from the event search module. An event can be searched by its title, contents, comments, start- and end date, priority and type.

Additionally it is possible to search other peoples events and/or events related to other people. Same goes for resources.

The simple search form will do a general text search over event meta data, while the "Advanced Search" feature allows the user to refine search parameters.

4.8 Repeating events

Conflux Professional has a full support for repeating events. An event can be marked as repeating upon adding or editing. There are four different repeating types.

Examples:

Repeat on every N'th day.

- 1) Repeat type: Daily
- 2) Repeat interval: 1 if every day, 2 if every other day, 3 if every third day and so on.

Example: Every day at 14:00-14:45 o'clock is lunch.

- 1) repeat type: daily.
- 2) repeat interval: 1

Repeat on every N'th week, on days x, y, z.

- 1) Repeat type: weekly
- 2) Repeat interval: 1 if every week, 2 if every other week and so on.
- 3) Check the days on which the event will occur.

Example: Sauna on the every second Saturday.

- 1) repeat type: daily
- 2) repeat interval: 2
- 3) check on Saturday

Repeat on every N'th month, on a specific day.

- 1) Repeat type: monthly
- 2) Repeat interval: 1 if every month, 2 if every other month and so on.
- 3) Day: the day when the event will occur.

Example: Taxes on the 20th of each month.

- 1) repeat type: monthly
- 2) repeat interval: 1
- 3) day: 20

4.9 Editing event contents:

Clicking on the events title will open the event editing form in a new window where all the required changes can be made.

It is possible to change others people events also, with some limitations:

1) If the event created by another person has the active user as a related person, then it is considered as the users own event, and all data can be modified.

2) Same goes for event which the user has a manage right to. (see Appendix A for an explanation on access rights)

3) If neither of the above is true, only commenting another persons event is allowed.

Additionally, private events cannot be modified or seen by other users.

4.10 Groups

Calendar groups are designed to be a short-hand way to assign events to multiple persons. Groups are unique and private, not shared or visible to other people. However, events assigned to groups are visible to the members of the groups as if they have been directly assigned as invited persons.

Adding a group: fill out the "Create a new group" form and move the desired people to the **left** list using the arrow icons. Then click on the "Save" button.

Modifying a group: click on the group name in the main "Groups" list. An edit form will open. Make the required changes and click on the "Save" button.

Deleting a group: click on the group name in the main "Groups" list. An edit form will open. Click on the "Delete" button.

4.11 Resources

The Conflux calendar can handle the use of shared resources such as conference rooms, cars and projectors.

To add a resource, put in the name of the resource in the "Add a resource" form and click on the "Save" button.

To rename a resource, check it's checkbox in the main "Resources" listing and click on the "Rename" button. A new form will open. Change the name of the resource and click on the "Save" button.

To delete a resource, check it's checkbox in the main "Resources" listing and click on the "Delete" button.

NB! Only organization administrators can manage (create, modify and delete) resources!

5. Tasks and Notes

This module is meant for planning tasks and creating a better overview of their progress. The system includes personal and team tasks.

Additionally, the notes module allows to create personal notes and memos.

5.1 Menu: Active tasks

The active tasks view gives the user a quick overview from all currently active (not finished) tasks related to the user. Overdue tasks are marked as red. Clicking on the task title opens the task details view.

5.2 Menu: All tasks

The all tasks view is similar to the active tasks view but displays all user related tasks, active and finished. If the task is not finished and is overdue, it is marked as red.

5.3 Menu: Search

The tasks search form is meant for faster finding of tasks. Tasks can be searched by all of its meta data.

5.4 Menu: Add:

New tasks can be created by clicking on the "Add" menu. For adding a new task, only the title is mandatory to fill, all other fields are voluntary and meant to help to describe the task better. The default pre-inserted start date value is the current day.

5.5 Menu: Notes

The notes module is meant for storing small bits of information as an alternative on adding a task. The advantages of notes module are that it gives a faster overview of notes contents than tasks and is more appropriate to store messages and memos which contain only text content.

6. Workflows

6.1 Overview:

Workflows are collections of tasks, scheduled in parallel or serial mode. They are designed to give a better overview of projects and work processes than individual tasks.

6.2 Menu: My workflows, Others' workflows, All workflows

My workflows lists active workflows created by the user or assigned to the user through the "Related persons" field of the workflow.

Others' workflows lists active workflows **not** created by the user or assigned to the user through the "Related persons" field of the workflow.

All workflows lists all workflows visible to the user, including the completed ones.

To see the workflow in a detailed form, click on the title on the workflow in the listing.

To delete workflows, mark the checkboxes in required rows and click on the "Delete selected" button.

6.3 Menu: Add workflow

To add a new workflow, click on the "Add workflow" menu item and fill out the opened form. The title, start date and due date parameters are obligatory.

Additional settings:

- **Serial workflow:** the tasks collected in the workflow are to be executed in a serial manner. Once a task is completed, the assignees of the next task will be automatically notified by e-mail about the new task.
- **Send e-mail to related persons to notify them about the new workflow:** users assigned as "related" to the workflow (not the tasks in the workflow!) will be notified by e-mail once the workflow is saved.
- **Send e-mail to related persons when the workflow is done:** users assigned as "related" to the workflow (not the tasks in the workflow!) will be notified by e-mail once the workflow has been completed.

6.4 Menu: Search

Workflow search allows the user to quickly find the required workflows. Workflows can be searched by:

- Simple mode: a general keyword search over the title and description of the workflow
- Advanced Search: a detailed search over title, description, start date and due date

6.5 Editing workflows

To edit a workflow, enter the workflow view form (by clicking on it's title in the listings described in section 6.2).

Edit info: by clicking on the "Edit info" button in the view form, it is possible to edit the general workflow meta data.

Manage tasks: by clicking on the "Manage tasks" button, it is possible to add existing tasks to the workflow or remove already assigned tasks from the workflow.

Add new tasks: by clicking on the "Manage tasks" button, it is possible to add new tasks to the workflow.

7. Discussions

7.1 Overview:

Upon entering the discussions module, the user is shown a screen which is divided into two distinct parts. To the top remains discussions category tree which contains different discussions categories. By default only the active category is displayed, to show the full tree click on the category name area with your mouse. The rest of the screen is used to display discussion topics under the current category or posts in an open discussion thread.

7.2 Menu: List

This view displays all discussion topics under the selected category. The list is ordered by date.

7.3 Menu: Search

Discussion search allows the user to quickly find the required discussion thread. Threads can be searched by author, title and content.

7.4 Menu: Add

New discussion threads can be added by clicking on the "Add" menu. Thread subject and contents are both mandatory to enter.

7.5 Replying:

Replying to a discussion thread can be done by clicking on the reply button under an open discussion thread.

7.6 Categories

Discussion categories can be created, renamed and deleted by the organisation administrators or by the superuser.

8. Contacts

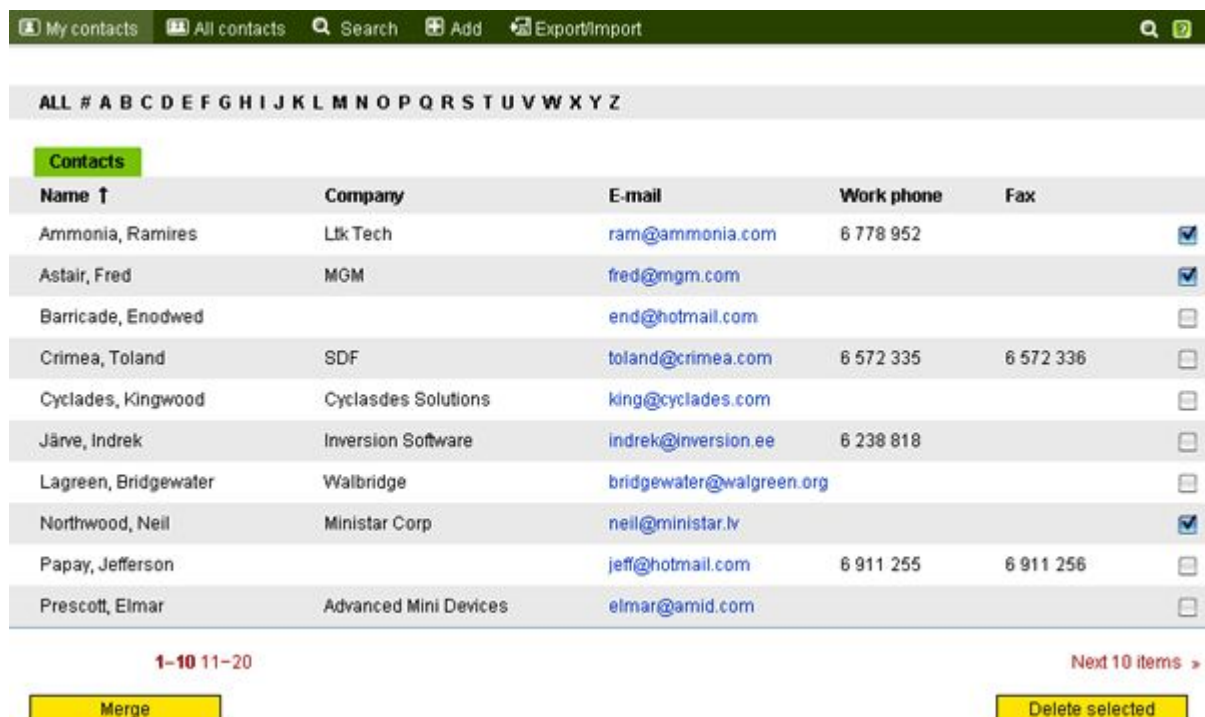
The contact database is a convenient way of recording and searching the data of clients and any related people. You no longer need to skim through your notebooks and read tens and tens of notes on your table, if you need to find a telephone number. You just need to type a few keywords or the name of the client in the contact search form and this result is quickly displayed on your screen. Generally, all contacts are shared and public, meaning that all users under the same organisation can see and modify shared contacts. The exceptions are the private contacts, which are visible only to their owners. The contacts module also works as an address book, which means that while sending an e-mails you can quickly select the mail receivers from the contact list.

8.1 Menu: My contacts

The "My contacts" view displays only the contacts added by the active user. This includes public and private contacts.

8.2 Menu: All contacts

The "All contacts" view displays all contacts visible to the user. This basically means that the user will see all public contacts added by anyone under an organisation for which he/she has read access to. By default, the list is ordered by the last and first name of the contacts. Clicking on a contact name opens contact details view (see section 3.6).



Name ↑	Company	E-mail	Work phone	Fax	
Ammonia, Ramires	Ltk Tech	ram@ammonia.com	6 778 952		<input checked="" type="checkbox"/>
Astair, Fred	MGM	fred@mgm.com			<input checked="" type="checkbox"/>
Barricade, Enoðwed		enod@hotmail.com			<input type="checkbox"/>
Crimea, Toland	SDF	toland@crimea.com	6 572 335	6 572 336	<input type="checkbox"/>
Cyclades, Kingwood	Cyclades Solutions	king@cyclades.com			<input type="checkbox"/>
Järve, Indrek	Inversion Software	indrek@inversion.ee	6 238 818		<input type="checkbox"/>
Lagreen, Bridgewater	Walbridge	bridgewater@walgreen.org			<input type="checkbox"/>
Northwood, Neil	Ministar Corp	neil@ministar.lv			<input checked="" type="checkbox"/>
Papay, Jefferson		jeff@hotmail.com	6 911 255	6 911 256	<input type="checkbox"/>
Prescott, Elmar	Advanced Mini Devices	elmar@amid.com			<input type="checkbox"/>

Picture: Contact listing

8.3 Menu: Add

Clicking on the Add menu opens the contact adding form. Contact first and last name are the fields that are mandatory to fill, all other fields are optional and help you to keep more information about the contact.

Add new contact			
First name*	Chales	Company	EMCA
Middle names		Department	Administration
Last name*	Ryan	Job title	CTO
Work phone	6 893 336	Fax	6 893 337
Cell phone	58 261 933	Home phone	
E-mail	charles.ryan@emca.com	Webpage	
Address		Description	
3276 South Street Hopkinton, MA 01749		Grumpy old man ;)	
Date of Birth	09/17/1966	Category	Business Personal Other
Sex	Male		
Private	<input checked="" type="checkbox"/>		
Save			

Picture: Add contact form

8.4 Menu: Search

The contact search form offers the functionality of finding contacts quickly and conveniently. The search tab is divided into two: a simple Search form and an Advanced Search form. The simple search form is displayed by default, clicking on the „Advanced Search“ link switches the forms.

Simple search:

Allows to search contacts by unified keyword search over clients meta data.

Advanced search:

Advanced search allows the user to define clear parameters for contact searches.

The contact search can be also used for sending mass e-mails as you can check the desired contacts from the search result and click on the “send e-mail” button to send an e-mail to all of them.

8.5 Menu: Export/Import

Contacts can be exported and imported in CSV (comma separated) and XML formats.

Importing contacts: Browse for the exported contact file on your computer (XML or CSV format) and select behaviour on importing contacts with matching names with existing contacts:

- **Insert as new** – insert identically named contacts as new
- **Update existing contacts** – update existing identically named contacts with new imported data
- **Leave out** – do not import identically named contacts

Exporting contacts: Fill out the “Export” form and click on the “Export” button.

Data selection (Export):

- All contacts – all visible contacts to the user
- My contacts – only the contacts added by the user

Output format:

- XML – Conflux XML contact export format
- CSV – comma separated text format

8.6 View Contact

Click on the contact name in the contact listing to open the “view contact” view. The view displays all information about the contact. On the top of the page are displayed five tabs: Info, Relations, Notes, E-mails and Log. The info tab is active by default. The e-mails tab shows you all e-mails exchanged between you and the contact, excluding the ones which are in deleted items folder. You can edit contact information by clicking the edit button on the bottom left of the screen.

8.7 Edit Contact Info

Click on the edit button in the contact view to open the edit contact form, make the required changes and click on the save button to save changes.

8.8 Merge Contacts

In some cases you might have two entries of the same contact (for example you add one and some of your colleagues adds another). In this case you can use the "Merge Contacts" functionality to merge these two. Check these two contacts in the contact listing and click on the merge button on the bottom-left of your screen. A view opens where you can set the primary contact. The primary contact is the one you wish to keep. Setting the primary contact opens the contact merge form. You can modify the data field manually and switch the data between two contacts by clicking on the button with arrows. Click on the save button when you are done. Merging contacts will also transfer all notes attached to the secondary contact to the primary contact as well as all relations also.

Merge Contacts			
This contact remains.	This contact gets deleted.		
First name*	Fred	↔	Neil
Middle names		↔	
Last name*	Astair	↔	Northwood
Company	MGM	↔	Ministar Corp
Department		↔	
Job title		↔	
Work phone		↔	
Home phone		↔	
Cell phone		↔	
Fax		↔	
E-mail	fred@mgm.com	↔	neil@ministar.lv
Webpage		↔	
Address		↔	
Description		↔	
Category	Business Personal Other		
Sex			
Date of Birth			

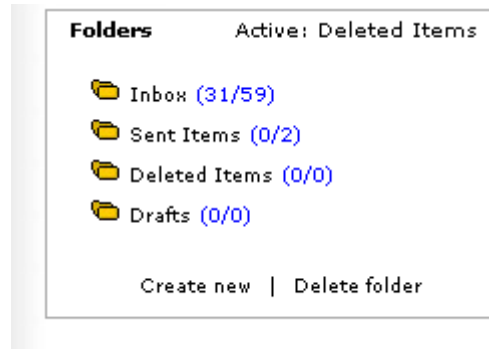
Save

Picture: Contact merging form

9. E-mail

9.1 Menu: E-mail

Upon entering the e-mail module, Conflux displays a list of e-mails under the active e-folder. The active e-folder can be changed by clicking on the folders tab at the top left of the screen.



Picture: Example of the e-folders.

E-mails are ordered by the date, most recent on top. The column 'F' shows whether the e-mail has an attachment or not. In case of an attachment a picture of a paper-clip is displayed. The column 'N' stands for new (unread) mail. Unread mails have a picture of a closed envelope and the whole line is marked bold, read e-mails have a picture of an open envelope. E-mails can be deleted, moved into other e-folders, marked as high or normal priority, marked as read or unread. For each of those actions buttons are present below the e-mail list. Clicking on the e-mail title or sender opens it.

9.2 Menu: Search

E-mails can be searched by sender, receiver, subject and contents. In addition, the user can specify in which folder the search should be performed and whether to filter e-mails with attachments.

9.3 Menu: Compose

New e-mails can be created in the compose section. The receivers can be typed in manually or selected from the address book (contacts). Clicking on the contact icon next to the "To:" field opens an address book. The address book contains all visible contacts with e-mail addresses. Conflux Professional e-mail module supports unlimited number of attachments. There are two ways of adding an attachment to an e-mail: it can be selected from the Conflux document management module or the local computer. For both of these actions buttons are present below the e-mail content field. After selecting the attachment, the user has to click the "Add attachment" button to add the attachment to the composed e-mail.

Mail format: Conflux e-mail client supports composing e-mails in both Rich Text and Plain Text modes. The default will be selected using the setting "Default e-mail editor" under **Admin->Settings**.

Signatures: Conflux supports multiple signatures. To add a signature to an e-mail, first set up your signatures in the "Signatures" tab of the Settings menu. After that an additional menu will appear next to the e-mail format selection. Select the desired signature and click on the "OK" button to add it to the e-mail.

9.4 Menu: Settings

The settings section is for managing settings and information needed by the e-mail client. The section is divided into four tabs:

- **Accounts** tab lists the existing accounts and their states. The following functions are available in this tab:
 - **Delete** – deletes the marked accounts
 - **Activate** – activates the marked accounts (mail is only fetched from active accounts)
 - **Deactivate** – deactivates the marked account
 - **Toggle 'Leave on server'** – if this setting is active for an account, new messages will be left on the server so other mail clients can also receive them. However this will slow down the "Check for mail" process in time.
- **Add an account** tab allows the user to add new accounts.
- **User information tab** allows the user to enter the information used in sending out new e-mails, such as the "From" field seen by the other users.
NB! The "Sender name" and "Sender e-mail" fields must be filled to compose new e-mails!
- **Signatures** tab allows the user to define three signatures. Signatures can be deleted by emptying their "Name" field and clicking on the "Save" button.

9.5 Menu: Check for mail

Clicking on the "Check for mail" checks for new mail on all active accounts, downloads new e-mails and displays the results.

9.6 Menu: Filters

E-mail filters allow the user to perform pre-defined actions on messages fetched from e-mail servers. For example, a user can tell the system to mark all e-mails coming from client@client.com as high-priority.

Adding a new filter:

- **Select the search context** (Search in)
 - Whole message – the keywords will be searched from the whole message.
 - Header (from, to) – the keywords will be searched from the e-mail header fields such as From, To, Cc.
 - Body (subject, text) – the keywords will be searched from the body of the message and the subject.
 - From – the keywords will be searched from the “From” field of the message.
 - To – the keywords will be searched from the “To” field of the message.
 - Subject – the keywords will be searched from the “Subject” field of the message.
 - Text – the keywords will be searched from the contents of the message.
- **Keywords** to search for (for) – text to search for in the previously defined context
- **Action** to perform
 - Move message to – defines a filter that upon finding the keywords in the defined context will move the message to the selected folder
 - Delete message - defines a filter that upon finding the keywords in the defined context deletes the message (useful for auto-deleting spam)
 - Mark as high priority - defines a filter that upon finding the keywords in the defined context will mark the message as high priority (displayed red in the listings)
- **Priority** – higher-priority (lower numbers) filters will be run first
- **Case sensitive** – if marked, the keyword search will be case sensitive. The default search is case insensitive.

10. Admin

10.1 Menu: My info

User information is displayed under the "My info" section. This is also the place where it can be changed. The users can also upload their photos to Conflux by using the "Picture" form. These photos will be displayed under the "Users" menu item, user information form.

NB: The password will be changed only if the password fields are filled, all other data can be changed by leaving the password fields blank.

NB: The e-mail address entered under "My info" is where Conflux sends its e-mail reminders, if left blank or incorrect address is entered, the user will not correctly receive his/her reminders.

NB: The cell-phone number under "My info" is where Conflux sends its SMS reminders.

10.2 Menu: Settings

Language: Sets the users Conflux interface language.

Date format: Allows to choose preferred date format. All dates displayed in Conflux use this setting.

Batch size: Indicates how many items from a list will be displayed on one page. See also the general section of the manual: Dividing into multiple pages.

Send me invitations and assignments by email: if this setting is enabled, the user will receive automatic notifications of new events and tasks added that have him/her as a related user.

Default e-mail editor: Defines the default editing mode used in composing new e-mails.

Time zone: Defines the user's time zone. All times in Conflux will be displayed with taking into consideration this setting.

10.3 Menu: Users

The users menu displays visible users. System Administrator can see all users, and Organization Administrators according to their access rights. Regular users can access this module too, but they can only view other users' information. Administrators can perform additional actions with users. They can add/delete users and modify users information. Deleting an user will remove all users personal data also (events, tasks and so on). Documents will remain though. If you do not want to loose all users data, you can deactivate the user instead of deleting. Deactivated users cannot log in, but all their data remains. Inactive users are displayed red in the list. Inactive users can be made active again if necessary.

Add user:

Click to to the "Add" button to open the user adding form. While filling the data fields, please make sure that you put the user to the correct organization, since the organization cannot be changed later.

Delete user:

Click on the trash-can icon at the right to delete an user.

10.4 Menu: Organizations

(Administrators only)

Under this tab are displayed organizations. This is also the place where they can be edited, deleted and where new organizations can be added. While adding new organizations, you should take in mind that organizations parent organization cannot be changed later. So it might be good idea to think through the organization structure before creating it.

10.5 Menu: Choices

(Administrators only)

Many modules use classifiers. All these classifiers can be edited from the choices tab. Both, System Administrator and Organization Administrators can edit these choices. The difference is that System Administrators' changes apply systemwide while Org. Administrators changes apply only to his organization.

The first part of the classifiers name indicates the module where the classifier is used, and the second part is the classifiers name. For example cal_priority is priority field in calendar.

user_dateformat, language and timezone are special classifiers which set up the system default values for these fields.

Currency setting can be set up by currency_prefix and currency_suffix classifiers. For example if your currency is \$200 then you should fill currency_prefix with \$ and leave currency_suffix blank. Alternately, if your currency is 200 FIM then you should write FIM to currency_suffix and leave currency_prefix blank.

10.6 Menu: Access Tree

(Administrators only)

Upon entering the Access Tree module you will see an organization tree. Clicking on an individual organization opens this organizations access list where you can set access permissions to this organization. On top-level organizations it is possible to enable/disable modules too by clicking on the "enabled modules" tab.

Read more about access rights in Appendix A: Access Rights

10.7 Menu: Groups

(Administrators only)

In groups sections you can create, edit and delete access groups. Groups allow more advanced access rights. For example you have organization A with "write access" to itself but you would like to have some users from that organisation A with "manage access" to itself. To accomplish this you can create a group B, put these selected users to this group and give group B a manage right to org A. Now these selected users have manage right (access rights always select max value when two or more options e.g. write and manage returns manage right).

Read more about access rights in Appendix A: Access Rights

10.8 Menu: ASP

(System Administrator only)

Under the ASP section, administrators can be assigned to organizations. Also, it is possible to set and remove quotas to organizations from there.

10.9 Menu: System

(System Administrator only)

The system section is divided into a four parts:

System Status

Backups

Point-in-Time Recovery

Recover Deleted Items

System Status:

On the top are displayed mounted devices and their usage, on the bottom is memory usage.

Backups:

From the backups section you can create database and file backups with just a single click. Also you can delete old unwanted backups from there. This is meant for small systems only, on large system backup should be done automatically by other means.

Point-in-Time Recovery:

Every object in Conflux has a change log and all modifications will be saved. This way it is possible to bring back any object state which can be done under Point-in-Time Recovery module. You can select the object from the list or search it by its id or name. Once you have found your object you can select and view object's data in different states. Finally you can click on the "Recover" button to bring back objects shown state.

Recover Deleted Items:

All items in Conflux can be un-deleted under "Recover Deleted Items" module. Just use the search function or browse for the object, open the object view form and click the "recover" button to bring the object back. Recursive un-deletions are not supported at this time, object must have a parent in order to restore it. (e.g. if you wish to restore a deleted file in deleted folder you will have to recover the folder first and then the file).

APPENDIX A

Access rights:

Conflux uses an hierarchical group-based access rights management system.

All objects in Conflux are organized into a hierarchical tree. The root node of the tree is always an organization under which reside its child objects.

Example:

```
Test organisation
  Test2 organisation
    User3
  User1
    event1
    task1
    private_contact1
    e_mail1
  User2
    private_note1
    task2
  Folder1
    document1
    document2
  Folder2
    Folder3
      document3
  Public_Contact1
    note1
  Public_Contact2
```

The general rule for selecting whether the object resides under an organisation or an user is that if an object contains data that should be shared with other users under the same organisation (folder, documents, public contacts), then it resides directly under the organisation, more private objects that belong to a certain user reside under user.

Access rights can be granted or revoked only to organisations and groups. Groups are virtual organisations that can be created by the administrators and have the purpose of allowing flexible and advanced access rights management.

Since access rights can be granted only on organisations and not other objects, the algorithm for finding a specific objects access right for a specific user uses a recursive bottom-to-top tree search method.

Example:

Lets check whether User3 from our previous example tree has an access right for document3.
First step:

Determine the users organisation. In this case it is Test2 organisation.

Second step:

Check if document3 is an organisation and has direct rights for Test2 organisation. Since in our case that is not true the algorithm will start making the same check for each of document3's parents, starting from the bottom (Folder3, then Folder2, then Test organisation).

As we reach Test organisation, there can be two cases:

- There is an direct access right for Test2 organisation on Test organisation.
In this case that right will be used.
If several access rights are found (user3 is in multiple custom groups), the **highest right will be used.**
- There is no direct access right. In this case, Test organisation is the root node and has no parent, thus the algorithm decides that user3 has no access right for document3.

Access rights come in four forms: no access, read access, write access and manage access.

No access:

- No access has been given, the user will not see the object.

Read access:

- Users can see the object but cannot modify it.

Write access:

- Users can modify the object if it is not a calendar event owned by another user. Also, everything that can be modified, can be deleted.

Manage access:

- In addition to the benefits of a write access, manage access allows to modify and delete another users non-private calendar events, unlock documents locked by other users, restore document versions and delete discussion posts.

In addition there are two special types of users:

- Superuser – free access to every object (similar to Unix root).
- Top-level organisation administrator
 - Can add sub organisations.
 - Can add user to their organisation and sub-organisations.
 - Can set access rights to sub organisations.
 - Can edit organisation-wide settings.
 - Can create discussion categories.
 - Can create new calendar resources.
 - Can modify front page announcements.

Suggestions for creating an organisations structure in Conflux

Lets look at the example of a company ABC which has four departments: Administration, Sales, Marketing and Development.

Administration must have an overview of everything.

Marketing staff must know what is going on in Sales and Development.

Sales and Development have no need to have an access to other departments.

Access tree in Conflux:

- ABC
 - Administration (Administration: write access by default)
 - Marketing (Marketing: write access by default , Administration: write access)
 - Sales (Sales: write access by default, Administration: write access, Marketing: write access)
 - Development (Development: write access by default, Administration: write access, Marketing: write access)

Note: this write access is just an example, you can switch it with a read access, if that is enough, or manage access, if write is not sufficient.

Note 2: It is not recommended to set organisations access right to itself to read only or even delete access completely: In first case, users from that organisation can only browse Conflux and not modify anything (even their own personal data), in the second case users will get an error as soon as they log in to Conflux, since they have no rights to view the front page. Read access to itself can be useful for example when you want to create a public document repository where users can only view and download the documents.

Suggestion: If you don't want to give a manage access to all users under the same organisation, but you need it for certain users, you can create a new group, place these certain users to that group and give that group a manage access to this organisation.