



Calipso

Community Edition

Administrators' Manual

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1. Welcome to Calipso

This document is the Administrators' Manual for the Calipso platform. It provides a guide for system, user, role, workflow and asset management functionality and options.

Calipso is a simple but horizontal and highly configurable task management and workflow platform. It can be easily customised and adapted to your organization's business procedures, goals and structure. Calipso's features include unlimited workflows, user and roles management, custom fields with per-workflow-state permissions, e-mail and LDAP integration, configurable file attachments, detailed history and reporting and fully customisable asset management.

Bellow you can find an overview of the features available in Calipso.

1.1. Workflow Management

A Calipso workflow defines all aspects of a business procedure, including the states (steps) composing it, the participating roles or users, the organizational assets involved and the custom fields that capture all relevant information. An item in Calipso is what other systems call a "ticket" or "case". Items may have dependencies between them and follow the rules of the workflow they belong to. Access to workflow items is subject to workflow roles configuration.

- **Workflow States** break a workflow down into steps. Calipso allows fine-grained access rights to be defined for any custom field per role and workflow step combination. States also define business logic plugins and email notification rules. A workflow can have any number of possible paths from one state to another depending on role rights.
- **State Plugins** are used for implementing custom business logic within a workflow and are defined per workflow state. Plugins are often used for pulling or pushing information from and to third-party systems. Calipso includes some commonly used plugins useful for copying asset information into an item, creating or updating assets etc.
- **Custom fields** are mapped in the Calipso user interface as form or other user interface elements of an item. There are different types of fields and their values may be entered by users or automatically by business logic plugins. Field access rights depend on the roles and workflow state in context. The available access rights per state are invisible, read-only, mandatory-if-empty and mandatory.
- **Workflow Roles** are perhaps the most important role type from a user's functional perspective since they allow the definition and management of access rights within a specific workflow. Workflows may use predefined roles such as "Workflow Administrator" or "Guest", or custom roles such as "Support Engineer" or "Sales Representative". Workflow roles may also be explicit or implicit regarding the users they apply to, for example the "QA Engineer" is an explicit role as it applies to specific users. Implicit roles may also be used depending on workflow configuration; those include "Guest" (any logged-in user) and "Anonymous".

A role has specific field level rights per state as well as origin-destination state combination rights. For example consider a simplistic bug reporting workflow, where a QA Engineer is able to change the state of an item to "Open" and "Closed" whereas a Developer can only change the state to "Fixed" and assign the item to the QA Engineer for review.

1.2. Asset Management

An asset in Calipso is a reference to any material or immaterial object that has a business meaning within your organization, such as hardware or software, buildings or conference rooms, vehicles, SLAs or other contracts etc.

Calipso allows you to create asset types to structure the characteristics (attribute types) for any class of objects that is meaningful for your organization. Assets of a specific type may then be created or updated manually, or as a result of a workflow. Assets may also be exported as PDF files for printing or sharing with external users and other systems.

Calipso also lets Administrators define their own templates with Velocityⁱ and converts the resulting HTML to PDF documents for printing or sharing with external users and other systems.

1.3. Search and Reporting

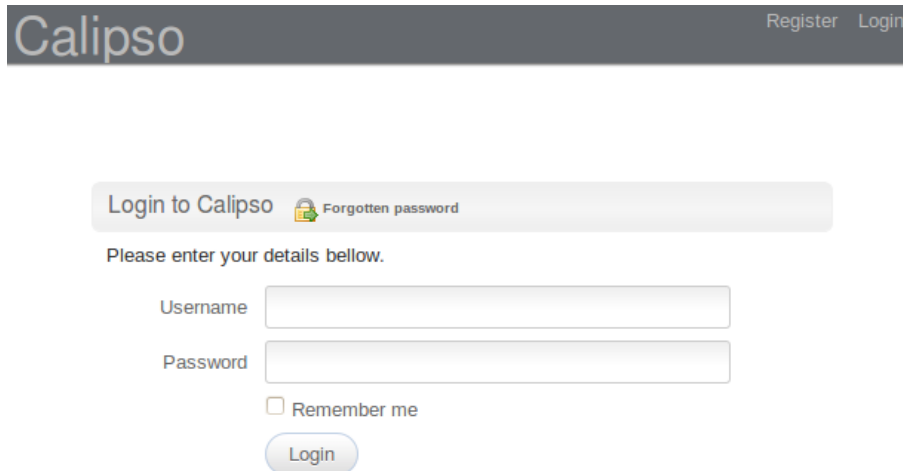
Calipso includes powerful search and reporting tools. You can search for items in any or all workflows, according to your access rights of course. Your search criteria can map directly to custom fields created for a workflow, allowing you to express any filters that are meaningful to your business.

System or workflow Administrators can also save search criteria, thus promoting searches to reports other users can view any time depending on item visibility settings. Both search and reporting results can be exported to spreadsheets for further processing using office suites such as MS Office or OpenOffice.org.

2. Introduction

2.1. Login

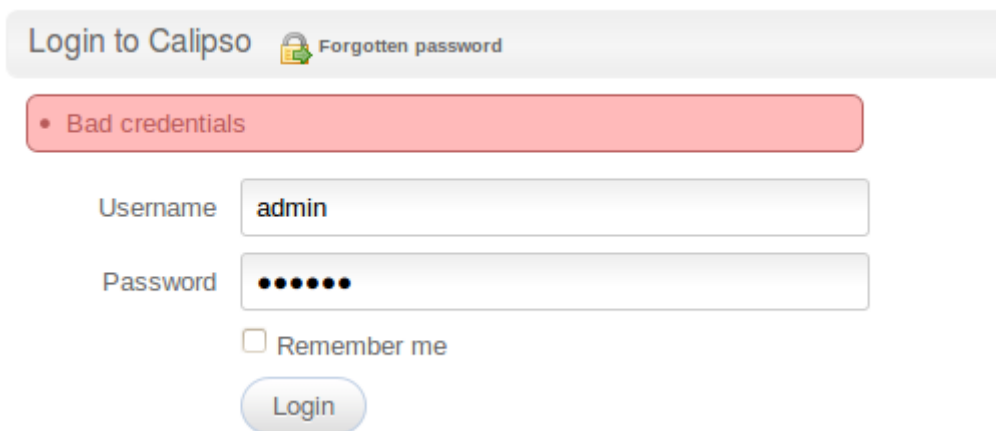
In order to access Calipso you will need to type your Username and Password and click on the "Login" button.



The screenshot shows the Calipso login interface. At the top, there is a dark header with the Calipso logo on the left and 'Register Login' on the right. Below the header is a light gray box containing the text 'Login to Calipso' and a link for 'Forgotten password'. Underneath, it says 'Please enter your details below.' There are two input fields: 'Username' and 'Password'. Below the password field is a checkbox labeled 'Remember me' and a 'Login' button.

Screen 1: Login form

If the combination of the login details is not correct the system will prompt you accordingly.



The screenshot shows the Calipso login interface after an unsuccessful attempt. A red error message box at the top says 'Bad credentials'. The 'Username' field contains the text 'admin' and the 'Password' field contains seven dots. The 'Remember me' checkbox is unchecked and the 'Login' button is visible.

Screen 2: Unsuccessful login attempt

Tip 1 Note that Username and Password are case sensitive, so before trying again check that you are using the correct keyboard language and that the "Caps Lock" option is not activated.

2.1.1. Remember me

By selecting the "Remember me" box, a cookie will be saved by your browser so that it can automatically fill the required fields.

Tip 2 Note that although, this is might be a convenient option, it creates security risk, especially in the case that the same computer is used or can be accessed by more than one person.

Exiting the system, you will presented with the confirmation of successful logout.

Logout successful

- Any active "remember me" sessions have been disabled.

Screen 3: Successful logout

2.1.2. Forgotten Password


The "Forgotten password" link can be found right above the Username and Password data fields. By selecting it, the application will ask you to enter your e-mail address.

Tip 3 Note that if you have more than one e-mail addresses, you will need to enter here the one used in your original registration.

Login to Calipso  Forgotten password
 Email address

Screen 4: Forgotten password

By selecting the "Send password" option, the system will notify you for the successful creation of an automatic message sent to your inbox. The message will include a new Password, which you will be able to change once you regain access to your account details (see Your account details).

Login to Calipso  Forgotten password A new password has been send to the entered email address

Screen 5: New password creation - confirmation

In case that the e-mail address provided does not match any user record, the system will notify you accordingly.

Login to Calipso  Forgotten password
 Email address

- The email address does not corresponds to a user

Screen 6: E-mail address does not match any User record

Tip 4 Note that the “Forgotten password” link is visible only after the mail server set-up is complete.


2.2. Self Registration

Calipso allows for user self registration. By selecting the “Register” link available on the login page, any external user can enter his/her personal details and create an account:

Field name	Description / Comments
Photo	Browse to attach a photo to profile or use the e-mail account to use an existing Gravatar ^{vi}
Login ID	Text field
Name	Text field
Last name	Text field
E-mail ID	Validated text field. The system validates the information entered, following the “E-mail Validation Rule”
Address	Text field
Postal code	Text field
Country	Drop-down menu. Options are shown in your preferred language and are preceded with the international code, as according to ISO 3166 ⁱⁱ specification.
Phone	Text field
Phone (alternative)	Text field
Fax	Text field
Organization	Drop-down menu, presenting all organisations already registered to the system and the option “Other” allowing the registration of a new organisation (see Screen 7: Self registration form for details)
Language	Drop-down menu. Options are automatically created by the system, according to the available languages.
Font size	Predefined options (extra large, large, medium, small, extra small)

User details

[Edit details](#)



Delete icon?
 Use the email below to display my Gravatar

Fill in the details and press the "Submit" button located at the bottom.

Login ID *	<input type="text" value="elefteria"/>
Name *	<input type="text" value="Elefteria"/>
Last name *	<input type="text" value="Kokkinia"/>
E-Mail ID *	<input type="text" value="elefteria@abiss.gr"/>
Address *	<input type="text" value="Andrea Kalvou 19"/>
Postal code *	<input type="text" value="14231"/>
Country *	<input type="text" value="GR - Greece"/>
Phone *	<input type="text" value="2111027900"/>
Phone (alternative)	<input type="text"/>
Fax	<input type="text"/>
Language	<input type="text" value="en - English"/>
Font size	<input type="text" value="small"/>
Organization	<input type="text" value="Abiss.gr"/>

Screen 7: Self registration form

On Submit, Calipso executes a second validation test and allows registration or notifies the user: the user e-mail address should match the Organisation's domain.

For the registration of a new Organisation, the required and optional fields needed are shown in the following screenshot.

Organization

Organization details

Organization name *

VAT Reg No *

Address *

Postal code *

Country *

Phone *

Phone (alternative)


Fax

Web site

Email *

Screen 8: Self registration form (User's Organization)

The system confirms the successful registration of the User and automatically sends the login details to the e-mail address provided.

[Login to Calipso](#)  [Forgotten password](#)

Your registration has been completed. You will soon receive the password to the email address that you have provided. Please enter your details below.

Username

Password

Remember me

Screen 9: Self registration confirmation

Hi Elefteria,

Your login details are as follows:

Login name	elefteria
Password	7de151eb

Use the link below to log in:

<http://betasupport.abiss.gr/>

Powered by Calipso

Screen 10: Default e-mail sent automatically after self registration

2.3. Navigation and User Interface

Calipso is a 100% web-based application. That means that in order to use it you need an active connection to the Internet (or the local network in the case of Calipso's use as an Intranet tool). You will also need a web browser, like Mozilla Firefoxⁱⁱⁱ or Google Chrome^{iv}. The user interface is designed so that the system functions are easily accessible and understood by users.

2.3.1. Dashboard

Once you gain access to Calipso, you will be transferred to the application Dashboard, presenting you the Spaces/Procedures that you participate in or that you have a role assigned.

If you choose one of these processes the left-hand side navigation menu will appear. The contents of the left menu change depending on the settings and contents of the process you have selected.

Tip 5 Note that these options are related only to your involvement to specific Spaces/Procedures, if applicable, and not your administration actions.

In the case that, you are not participating in any Spaces/Procedures, your Dashboard will be empty.

/ My dashboard

My spaces overview You are not mapped to any spaces

Screen 11: Empty dashboard

2.3.2. Top Menu

The application header contains the top menu with links to the three main areas of the Calipso environment "My Dashboard", "Search" and "Options". It also includes the "Logout" option and presents your "Full Name (login id), Organisation".

Support Administrator (admin), Abiss.gr



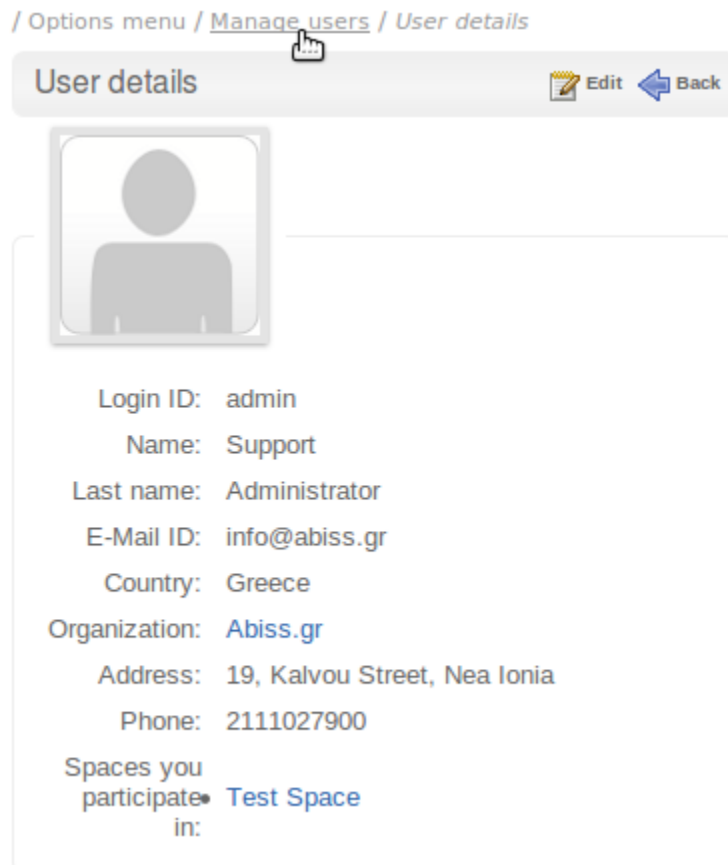
Screen 12: Calipso's top menu

The functions available only to System Administrators can be found under "Options".

2.3.3. Breadcrumbs

Just below the header area, the application dynamically generates and presents to you the path you have taken to arrive at a page and provide you links back.

For example, while previewing a User's details, breadcrumbs will allow you to see the path followed, i.e. Options > Manage users > User details and move to any of those pages by selecting the appropriate link.



Screen 13: Example of breadcrumbs


2.4. Your account details

To see your account details navigate to Options > Edit user profile.

Your account details include a number of fields, as shown in the screenshot below. The fields marked with an asterisk "*" are mandatory and cannot be left blank.

Tip 6 Note that the Password / Confirm Password fields are empty. If you wish to change your Password you should type here the new one. If the fields are left empty you will be able to login using your existing Password.

Edit details



Delete icon?

Use the email bellow to display my Gravatar

Login ID *

Name*

Last name*

E-Mail ID*

Address*

Postal code*

Country* ▼

Phone*

Phone (alternative)

Fax

Organization [Abiss.gr](#)

Language ▼

Font size ▼

Password

Confirm password

Screen 14: Editing your user details

Field name	Description / Comments
Photo	Browse to attach a photo to the user's profile, use the e-mail account to use an existing Gravatar ^{vi} or check the "Delete icon" box.
Login ID	Text field
Name	Text field
Last name	Text field
E-mail ID	Validated text field. The system validates the information entered, following the "E-mail Validation Rule"

Address	Text field
Postal code	Text field
Country	Drop-down menu. Options are shown in your preferred language and are preceded with the international code, as according to ISO 3166 ^v specification.
Phone	Text field
Phone (alternative)	Text field
Fax	Text field
Organization	Not editable. The organization you belong to is set during your initial registration to the system and cannot be changed.
Language	Drop-down menu. Options are automatically created by the system, according to the available languages.
Font size	Predefined options (extra large, large, medium, small, extra small)
Password	Text field.
Confirm password	Text field. Content should match the entry made in the previous field.

2.4.1. Your e-mail

The e-mail address registered in your personal account, will be used by Calipso for:

- password resets
- user intrigued notifications
- automatic notifications

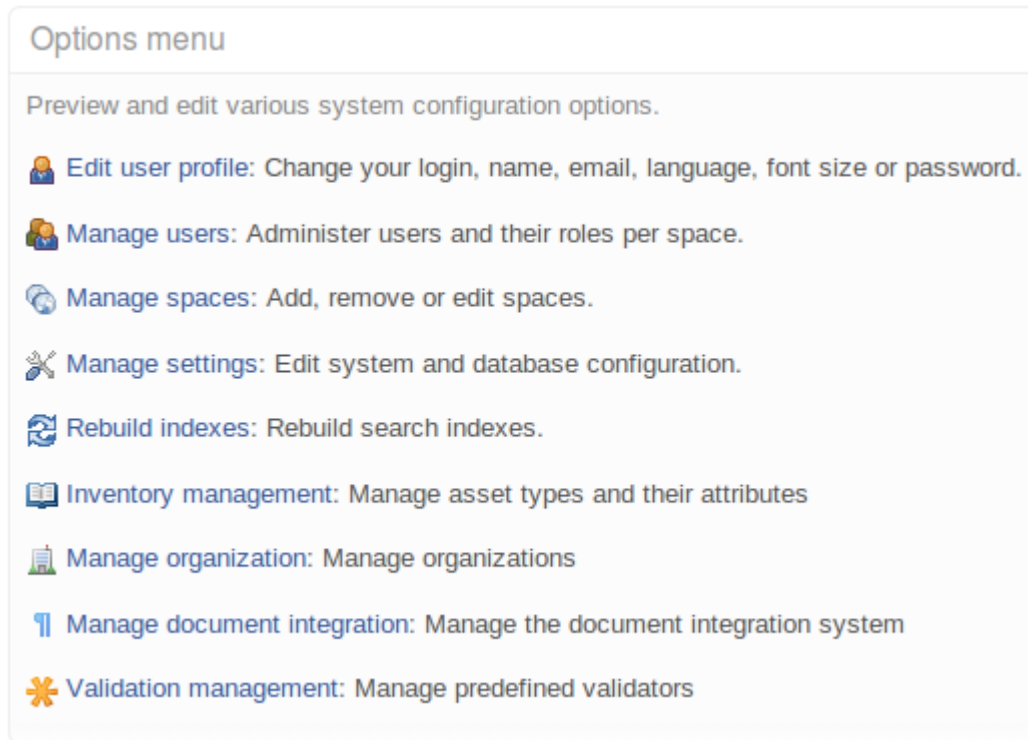
2.4.2. Your photo (Avatar)

Calipso offers you with two distinct options:

- upload a picture / icon from your local system
- use your picture / icon form Gravatar.com^{vi}

3. Administrative Tasks

This is the area presenting you all the options you have as an Administrator.



Screen 15: Options menu (Administrator)

The following paragraphs describe in detail each option separately.

3.1. Managing Users

3.1.1. User List

To see the list of registered users navigate to Options > Manage Users.

You will then be presented with a list of registered users; from there you can search using user-based criteria, edit an existing user and associated roles, as well as create a new user.

/ Options menu / Manage users

Manage users Create new user Back

You can create, delete or edit a particular user. You can also filter out particular users.

Filter by

Login name	Name	Last name	Email	Organization	Country	Language	Locked	Edit profile	Spaces and roles
(marvin)	Marvin	Robot	marvin@abiss.gr	Abiss.gr	Greece	en			
(admin)	Support	Administrator	info@abiss.gr	Abiss.gr	Greece	en			

Screen 16: The user list

3.1.2. Search for a User

Above the user list, as presented in Options > Manage users, the Calipso interface provides a search field allowing you to filter the user entries. You can search users / filter results by login name, name, last name, email, address and phone number.

/ Options menu / Manage users

Manage users Create new user ← Back

You can create, delete or edit a particular user. You can also filter out particular users.

Filter by: Login name Search

Login name	Last name	Email	Organization	Country	Language	Locked	Edit profile	Spaces and roles
(marvin)	robot	marvin@abiss.gr	Abiss.gr	Greece	en			
(admin)	administrator	info@abiss.gr	Abiss.gr	Greece	en			

Powered by Calipso 2.1.2

Screen 17: Search User

3.1.3. Create a new User

On the top of the page, you will find the “Create new user” link and by selecting it you will be presented with the “Edit details” empty form.

User account details include a number of fields, as shown in the screenshot below. The fields marked with an asterisk “*” are mandatory and cannot be left blank.

- **Password:** while creating a new user account, you as administrator, have two options regarding the creation of the password:
 - type a specific password (you should type it in both the “Password” and the “Confirm password” fields)
 - let Calipso create one (leave the fields empty and proceed)
- **Send password by e-mail:** by checking the box you trigger the automatic creation of an e-mail message informing the user about the password created.

Tip 7 Note that until specific roles are assigned to the new user, he/she will be able to see only Spaces allowing “Guest” participation.


3.1.4. Update User details

The fields are identical to the ones described in section “Create a new User”, with the addition of the Locked option:

- **Locked:** your administrator role allows you to “lock” a user account. A locked user is not deleted from the system but loses access rights and role-based privileges until the account is unlocked.

Fill in the details and press the "Submit" button located at the bottom.

Edit details



Use the email below to display my Gravatar

Login ID*

Name*

Last name*

E-Mail ID*

Address*

Postal code*

Country*

Phone*

Phone (alternative)

Fax

Organization

Language

Font size

A password will be generated and emailed by default. The fields below are optional.

Password


Confirm password

send password by email

Fill in the details and press the "Submit" button located at the bottom.

User details

Edit details



Delete icon?
 Use the email below to display my Gravatar

Login ID*

Locked

Name*

Last name*

E-Mail ID*

Address*

Postal code*

Country*

Phone*

Phone (alternative)

Fax

Organization

Language

Font size

Password

Confirm password

send password by email

Screen 18: Creating a new user

Screen 19: Update User Details

The table below provides a full description of the information fields that comprise a User Account.

Field name	Description / Comments
Photo	Browse to attach a photo to the user's profile, use the e-mail account to use an existing Gravatar or check the "Delete icon" box.
Login ID	Text field
Name	Text field
Last name	Text field
E-mail ID	Validated text field. The system validates the information entered, following the "E-mail Validation Rule"
Address	Text field
Postal code	Text field
Country	Drop-down menu. Options are shown in your preferred language and are preceded with the international code, as according to ISO 3166 ^{vii} specification.
Phone	Text field
Phone (alternative)	Text field
Fax	Text field

Organization	Not editable. The organization a User belongs to is set during the initial registration to the system and cannot be changed.
Language	Drop-down menu. Options are automatically created by the system, according to the available languages.
Font size	Predefined options (extra large, large, medium, small, extra small)
Password	Text field.
Confirm password	Text field. Content should match the entry made in the previous field.

Tip 8 Note that the Password / Confirm Password fields are empty. If you wish to change the User's Password you should type here the new one. If the fields are left empty the user will be able to login using his/her existing Password.

3.2. Managing Workflows

3.2.1. Space List

To see the list of existing Spaces/Procedures navigate to Options > Manage Spaces.

You will then be presented with a list of existing spaces; from there you can edit an existing space and associated users and assets, as well as create a new space.

/ Options menu / Manage spaces

Space list Create new space

In the below list you can create, delete or edit a particular space. Also you can allocate users and associate assets to a particular space.

Name	Key	Description	Space group	Edit	Users	Assets	Documents
Test Space	TEST	This is a test Space	Testing				

Screen 20: Space list

3.2.2. Creating a new Space

On the top of the page, you will find the “Create new space” link. The creation of a new space is a four-step process, where you will be able to:

- Select supported languages
- Set the space details
- Define custom data fields
- Manage workflow stages, roles and privileges

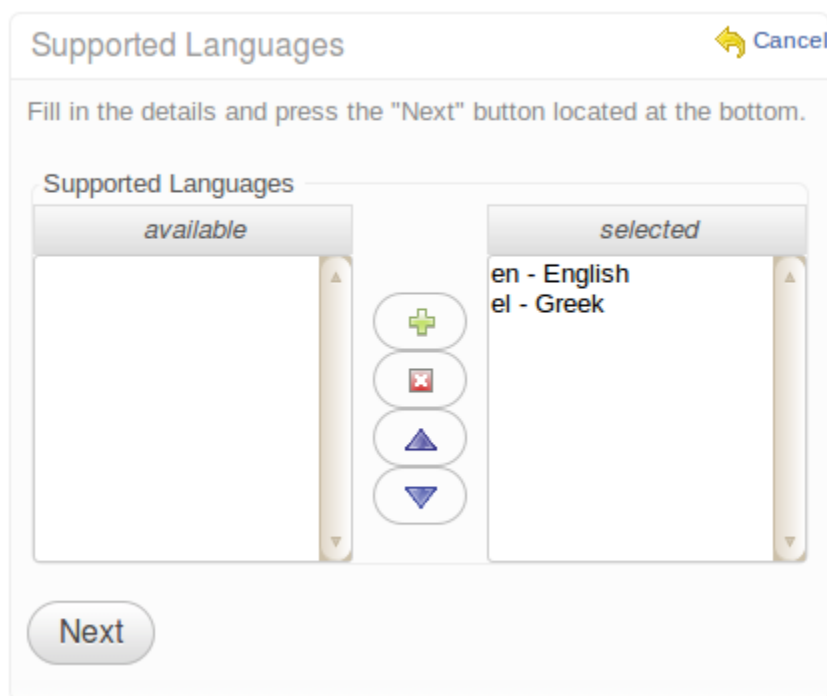
3.2.2.1. Supported Languages

The languages pane is divided in two parts: in the left-hand side you will find all available languages, in the right-hand side all the languages the new space will support.

By selecting any language from the left part and then using the + sign, you can move it to the right list. Accordingly, you can select any language from the “selected” list (right side) and using the - sign to move it to the left pane.

The available blue arrows allow you to define the order that the selected languages will appear in the administration interface.

Tip 9 The “selected” list should contain at least one language in order for you to complete the process, and therefore should not be left empty.



Screen 21: Add languages to a Space

3.2.2.2. Space Details

This second step of the space creation process allows you to define:

- **Space display name(s):** the application will create one space display name field for every language you have selected in the previous step, order and label them accordingly.
- **Space key (short name):** this unique short name will be used by the application. Note that only capital letters and numeric characters are allowed in this field.
- **Description:** the text entered here appears in the Space List under the “Description” column and as a tooltip message on mouse-over the Space Name. It should be kept short but meaningful in order to help users understand the nature or the purpose of each space.

- **Default maximum allowed duration for item completion:** in this field you are asked to express the time limit for the completion of an item (also called issue or ticket). The application allows for this to be entered in the language you have selected for your interface. If the language selected in your profile preferences is English then:

Period	Long description	Short description
Year(s)	1 year, 2 years, ...	1y, 2y, ...
Day(s)	1 day, 2 days, ...	1d, 2d, ...
Hour(s)	1 hour, 2 hours, ...	1h, 2h, ...
Minute(s)	1 minute, 2 minutes, ...	1m, 2m, ...
Second(s)	1 second, 2 seconds, ...	1s, 2s, ...
Millisecond(s)	1 millisecond, 2 milliseconds, ...	1ms, 2ms, ...
Combination	1 year 10 days 2 hours 4 minutes 1 seconds 10 milliseconds	1y 10d 2h 4m 1s 10ms


- **Item visibility:** this drop-down menu allows you to define the settings regarding the visibility for the items that will be created and managed in this space. The available options are:
 - Assigned space users only
 - Logged-in users can see their own items
 - Logged-in users can see all items
 - Public (visible without login)
- **Asset visibility:** this drop-down menu allows you to define the settings regarding the assets of the space and their visibility. The available options are:
 - Space uses no assets
 - Assets are private to space
 - Assets are visible to space group
 - Assets are visible to any space
- **Copy existing space:** the drop-down includes all the available Spaces allowing you to use an existing space as a “template”. This option can save you a lot of time and effort when you want to create spaces sharing workflow stages, user roles and/or custom fields and permissions.
- **Select or create space group:** the drop-down includes all existing Space Groups and allows you to create a new one. In order to create a new space group, you will be asked to enter a short description and a name, as shown in the screenshot below.

Select or create space group	<input type="text" value="Create new space group..."/>
Space group name	<input type="text" value="Testing"/>
Space group description *	<input type="text" value="Spaces created for testing purposes"/>

Screen 22: Create new space group

Tip 10 Note that in order to move to the next step you will need to complete all required fields.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space"

Space details  Cancel

Fill in the details and press the "Next" button located at the bottom.

Display name *	<input type="text" value="Test Space"/>	English
	<input type="text" value="Δοκιμαστική Διαδικασία"/>	Greek
Space key (Short name) *	<input type="text" value="TSP"/>	
Description *	<input type="text" value="This is a test Space"/>	
Default maximum allowed duration for item completion	<input type="text"/>	
Item visibility	<input type="text" value="Assigned space users only"/>	<input type="button" value="v"/>
Asset visibility	<input type="text" value="Assets are private to space"/>	<input type="button" value="v"/>

Select or create space group

Screen 23: Space details

3.2.2.3. Custom fields

The available custom field types include:

Field type	Description	Comments
Free text field	allows the entry of free text	it can be associated with a Validation rule
Decimal number	allows the entry of numbers	it is recommended only for numeric values that may be used in calculations
Drop down list	creates a customisable drop-down menu	options are set and ordered by the administrator
Country	drop-down of Countries	options are shown in the preferred language and are preceded with the international code, as according to ISO 3166 ^{viii} specification
Date field	allows the entry of a date	manually or with the use of the calendar widget
Organization	creates a dynamic drop-down menu	options are automatically set to include all Organisations registered in the system
File	creates a file field	it allows browsing to local systems and upload a file to the application
User	creates a dynamic drop-down menu	users belonging to an Organisation

3.2.2.3.1. Add new custom fields

i. Add a new free text field

In order to add a new free text field to your space, you will need to make the appropriate selection among the available types of custom fields.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space

Custom fields for space: Test Space (TSP) Cancel

View and modify the custom fields from the list or add a new one from the drop-down menu.

Custom fields for space

Choose type of custom field to add Free text field - 20 left Add field

Back
Next

- Severity (Drop down) - 1 left
- Priority (Drop down) - 1 left
- Drop down list - 10 left
- Decimal number - 50 left
- Free text field - 20 left ☞
- Country - 2 left
- Date field - 10 left
- Organization - 1 left
- File - 5 left
- User - 1 left

Screen 24: Add a new free text field

The application automatically creates an internal name for the new field. You will need to insert a label for every available language of the space and select (if applicable) a validation rule from the automatically generated expression list.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name cusStr01

Label * English

Greek

Validation expression list None

None

None

Email

Done

Screen 25: Customise the new free text field

ii. Add a new decimal number field

In order to add a new decimal number field to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name cusDbI01

Label * English

Greek

Done

Screen 26: Customise the new decimal number field

It is recommended that this type is used for numeric values that may be used for calculations by the application and not for data, that although numbers, do not participate in such operations.

Tip 11 It is recommended to select Free Text field type for values that are not used in calculations, e.g. telephone numbers, P.O. Box numbers etc.

iii. Add a new drop-down list

In order to add a new drop-down list to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

Additionally, you will need to add the options you want to be included in the new drop-down list. You should enter one option per line (separate with paragraph breaks). The area field

allows you to paste long lists from your clipboard.

By selecting the “Update” button, the options will be transferred above the text area and can be edited separately:

- use the “up” and “down” arrows to define the order of options' appearance
- use the “edit” button to alter the text value of an option
- add more options to the list by entering them in the text area and select “Update”

In order to complete the creation of the new field you will need to select among the two available presentation options:

- drop-down list
- auto-suggest text

Internal name `cusInt01`

Label * English

Greek

Options	1 GNU/Linux	▲	▼	✎
	2 BSD	▲	▼	✎
	3 MS Windows	▲	▼	✎
	4 Sun Solaris	▲	▼	✎
	5 HP-UX	▲	▼	✎
	6 IBM AIX	▲	▼	✎
	7 Apple Mac OS X	▲	▼	✎

Screen 27:
Customise the new drop-down list and its options

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
↩ Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name

Label * English

Greek

Options

Update

GNU/Linux
 BSD
 MS Windows
 Sun Solaris
 HP-UX
 IBM AIX
 Apple Mac OS X

Add option

Select how to show the options

-
-

Screen 28: Customise the new drop down field


Tip 12 It is recommended to use the "Auto-suggest text" for long lists to avoid long and difficult to use drop-down menus.

iv. Add a new country field

In order to add a new country field to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

The new country field, is a drop-down displaying the options to every user in his/her preferred language and are preceded with the international code, as according to ISO 3166^{ix} specification.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name

Label * English

Greek


Done

Screen 29: Customise the new country field

v. Add a new date field

In order to add a new date field to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name

Label * English

Greek

Done


Screen 30: Customise the new date field

The applications allows for date values to be entered manually or using the calendar widget.

vi. Add a new organization field

In order to add a new organisation field to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name

Label * English

Greek

Done


Screen 31: Customise the new organisation field

The new organisation field, is a dynamically updated drop-down, whose options include all Organisations registered in the system.

vii. Add a new file field

In order to add a new file field to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Internal name

Label *	<input type="text" value="Attachment"/>	English
	<input type="text" value="Συνημμένο"/>	Greek

Done


Screen 32: Customise the new file field

The new file field allows browsing to local systems and upload a file to the Calipso. As the Administrator of the system you can define the acceptable for uploading file formats.

viii. Add a new user field

In order to add a new file field to your space, you will need to make the appropriate selection among the available types of custom fields. The application automatically creates an internal name for the new field. You will need to insert a label for every available language.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Edit field

Edit field
 Cancel

Fill in the details and press the "Done" button located at the bottom.

Select organization

Internal name

Label *	<input type="text" value="Team Leader"/>	English
	<input type="text" value="Υπεύθυνος Ομάδας"/>	Greek

Done

Screen 33: Customise the new user field

























You can also select a specific Organisation in order to filter the users that will appear on the dynamically updated drop-down field.

3.2.2.3.2. Edit custom fields

The list of the created custom fields is available for further customisation and editing:

- use the “up” and “down” arrows to define the order of the custom fields' appearance
- use the “edit” button to alter any field

You can add more options to the list by making the appropriate selection from the drop-down menu or select “Next” to go to the fourth step of the new space creation process.

Move	Internal name	Type	Label	Option list	Edit
 	Contact e-mail address	Free Text Field	Contact e-mail address		
 	Total number of Incidents	Decimal Number	Total number of Incidents		
 	Location	Country	Location		
 	Start date	Date Field	Start date		
 	Organisation	Organization	Organisation		
 	Attachment	File	Attachment		
 	Team Leader	User	Team Leader	<ul style="list-style-type: none"> • 1 • Abiss.gr 	
 	Operating System	Drop Down List	Operating System	<ul style="list-style-type: none"> • GNU/Linux • BSD • MS Windows • Sun Solaris • HP-UX • IBM AIX • Apple Mac OS X 	

Screen 34: Custom fields list

3.2.2.4. Roles, Permission and Workflow States

Based on the information provided in the previous steps (1 to 3), Calipso will present you with the default user roles, permissions and workflow states allowing you to perform any customisation needed to match your requirements and needs.

3.2.2.4.1. Default space overview

A. Workflow states

The default space includes 3 states:

- **New:** the state allowing the creation of a new item
- **Open:** the state assigned automatically to any new item entered to the system
- **Closed:** the state assigned to completed items

Your role, as administrator of the system, you are able to:

- add any number of states by selecting the “+” sign
- rename any state to match your usage scenario
- customise any state to fulfil your workflow requirements (see Customise workflow States)

Tip 13 Any state added manually inherits the “Open” state characteristics. An item can have only one “Closed” state.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Space roles and state-Transitions (Workflow) for space

Workflow and role permissions for space: Test Space (TSP) Cancel

Modify the workflow.

		Next allowed state		Field level permissions									
				<input type="checkbox"/> Mandatory <input type="checkbox"/> Mandatory if empty <input type="checkbox"/> Optional <input type="checkbox"/> Read-Only <input type="checkbox"/> Hidden									
State	Role	Open	Closed	Contact e-mail address	Total number of Incidents	Location	Start date	Organisation	Attachment	Team Leader	Operating System		
New	Space Administrator	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
	Regular User	<input checked="" type="checkbox"/>		<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>		
Open	Space Administrator	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Regular User	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
Closed	Space Administrator	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		
	Regular User	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>		

Common field permissions

	First response after	Closed after	Asset	Asset type	Due in (state/item)	Planned effort	Actual effort
Space Administrator	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>
Regular User	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>	<input type="text" value="hidden"/>

New	Regular User	Open	Regular User	Open
	Space Administrator		Space Administrator	Open
	Regular User	Closed	Regular User	Open
	Space Administrator		Space Administrator	Open

Screen 35: Default space overview

B. User roles

The user roles that appear on the default automatically created space depend on your selection regarding item visibility in step 2. (see Space Details)

The four system-defined roles are:

- **Space Administrator:** able to edit space settings (add states, custom fields, user roles, edit states and field permissions, assign roles to users), privileges to Space according to specific settings.
- **Regular User:** no access to administrative functions, privileges to Space are set by the administrators, accessible after login. Regular users are the registered users assigned a specific role to a space.
- **Guest:** no access to administrative functions, privileges to Space are set by the administrators, accessible after login. Guest users are the registered users who are not assigned a specific role to a space.
- **Anonymous:** not registered, privileges to Space are set by the administrators, accessible without login.

Item visibility setting	Default user roles
Assigned space users only	Space Administrator
	Regular User
Logged-in users can see their own items	Space Administrator
	Regular User
	Guest
Logged-in users can see all items	Space Administrator
	Regular User
	Guest
Public (visible without login)	Space Administrator
	Regular User
	Anonymous

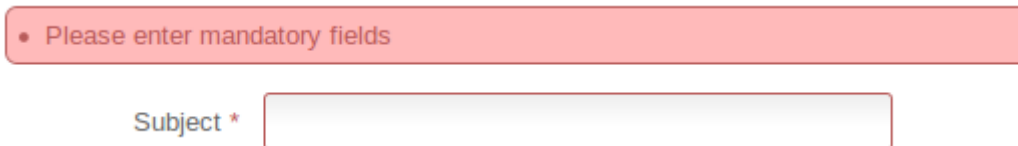
Tip 14 Note that all the roles created by System or Space Administrators inherit the privileges of the Regular User.

C. Field level permissions

As administrator, you need set a specific level of permission for every custom field, for every user role involved in the process.



- **Mandatory:** users will not be able to complete their entry unless they complete these fields. The system marks mandatory fields with a "*" and notifies the user accordingly if the field is not filled.

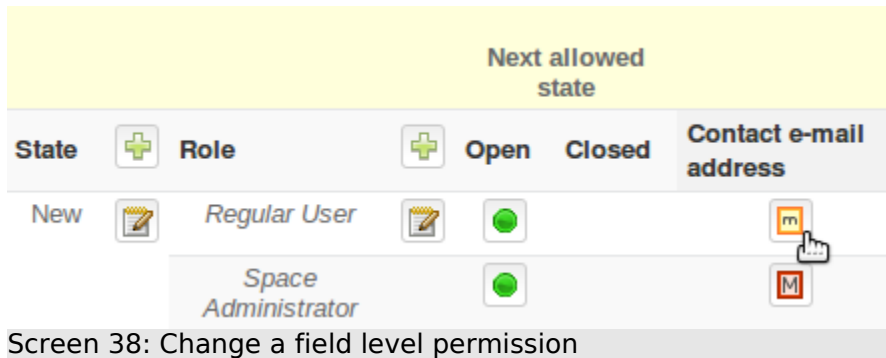


Screen 37: Mandatory field notification

- **Mandatory if empty:** users will not be able to complete their entry unless the field has been completed in earlier stages of a process. This permission is used for fields that have been characterized as "Optional" in initial stages, but need to be completed in order to proceed from a given point and on.
- **Optional:** users are able to complete their entry without completing optional fields.
- **Read-Only:** users are able to preview field contents, but have no permission to edit / alter them.
- **Hidden:** contents of these fields remain hidden from users.

Tip 15 Note that by default, all custom fields are Mandatory at “New” stage and Read-Only at any other existing stage.

You can change the field level permission, by clicking on the image denoting the current selection. On each click the permission changes, following the recurrent circular sequence Mandatory / Mandatory if empty / Hidden / Read-Only / Optional / Mandatory etc.



Screen 38: Change a field level permission

The different field permissions for every role involved in the process are shown (and edited) in the corresponding row of the workflow modification table.

D. Common field permissions

User permissions to space common fields, are set by the system or the space administrator, by selecting the appropriate value form the corresponding drop-down menus.

Common field permissions

	First response after	Closed after	Asset	Asset type	Due in (state/item)	Planned effort	Actual effort
Regular User	hidden	hidden	hidden	hidden	hidden	hidden	hidden
Space Administrator	hidden	hidden	hidden	hidden	hidden	hidden	hidden

Screen 39: Setting permissions for the space common fields per role

Tip 16 Note that Calipso will create a new row for every existing role in the space. By default the table will include the roles of Space Administrator and Regular User. As described in section User roles, Guest or Anonymous may also appear, depending on Space settings.

Common fields, as set by the system, include:

Common field	Description	Options	Comments
First response after	automatic field, calculating the time elapsing from the creation of a new item until the first response from another user	read hidden	
Closed after	automatic field, calculating the time elapsing from the creation of a new item until its transfer to the “Closed”	read hidden	

	state		
Asset		hidden create update read	
Asset type		hidden read	
Due in (state/item)		hidden create update read	
Planned effort		hidden create update read	
Actual effort		hidden create update read	

3.2.2.4.2. Adding Users to a Workflow

Clicking on the “Users” icon found in every row of the Space list, you will be able to preview the users that have been allocated to the specific space. You will also be able to see the role that has been assigned to each one of the users.

/ Options menu / Manage spaces

Space list Create new space Back

In the below list you can create, delete or edit a particular space. Also you can allocate users and associate assets to a particular space.

Name	Key	Description	Space group	Edit	Users	Assets	Documents
Test Space	TEST	This is a test Space	Testing				

Screen 40: Space list

At any time, you as the administrator, can:

- **add a user to the space:** select the user from the dynamically updated drop-down (includes all registered users) and then select the appropriate role from the second drop-down (includes all the existing roles of the specific space). The table of users will be updated to include your selection.
- **remove a user from the space:** you can remove a user by selecting the corresponding “X” button. Remember that since a user can be assigned more than one role, you need to perform this action as many times as the roles assigned in order to totally remove a user from a space.
- **change a user's role to the space:** at any time, you can add a new role to any registered user. To replace a role, you will need to add the new one and remove the one previously assigned.

Tip 17 Note that a user can be assigned more than one role to each space. In such a case, the user is granted the maximum level of permission given by any of his/her roles.

/ Options menu / Manage spaces / Users allocated to Test Space (TSP)

Space users ← Back

View and modify users and their roles to space

Users allocated to Test Space (TSP)

Login name	Name	Last name	Organization	Role	Remove
admin	Manos	Batsis	Abiss.gr	Space Administrator	

Choose user and role to allocate [[New user](#)]

User: Elefteria Kokkinia (elefteria), Abiss.gr

Role: Regular User Regular User Space Administrator

Allocate Done

Screen 41: Allocate Users to Space by selecting specific roles

Tip 18 Note that you can create a new user account by selecting the link provided in this page for your convenience.

3.2.2.4.3. Customise workflow States

As mentioned before, every new Space includes three default stages: New, Open, Closed. You can add and customise as many states you need in order to fully implement your process. Each state is comprised by the following elements:

- **State name:** you can select any name you feel it is appropriate. The names of the states appear in the user interface, so they should be as short and comprehensive as possible.

Tip 19 Note that you can not rename the “New” state. This is mainly because the New state name does not appear anywhere in the application.


- **Plugins:** go to section Plugins for information and details.
- **State duration:** in this field you are asked to express the time limit for the completion of a state. The application allows for this to be entered in the language you have selected for your interface.

If the language selected in your profile preferences is English then:

Period	Long description	Short description
Year(s)	1 year, 2 years, ...	1y, 2y, ...
Day(s)	1 day, 2 days, ...	1d, 2d, ...
Hour(s)	1 hour, 2 hours, ...	1h, 2h, ...
Minute(s)	1 minute, 2 minutes, ...	1m, 2m, ...
Second(s)	1 second, 2 seconds, ...	1s, 2s, ...
Millisecond(s)	1 millisecond, 2 milliseconds, ...	1ms, 2ms, ...
Combination	1 year 10 days 2 hours 4 minutes 1 seconds 10 milliseconds	1y 10d 2h 4m 1s 10ms

- **Asset type of which entries will be created or updated using item information:** a dynamically updated drop-down that includes all asset types available in the specific space. See more details about asset (or inventory) types in section Inventory Types & Asset Management
- **Asset type of which entries will be used to automatically enter item information:** a dynamically updated drop-down that includes all asset types available in the specific space. Select the “allow multiple entries” in case that an item may result to the creation of more that one asset entry.

/ Options menu / Manage spaces / Edit language support for space: "Test Space" / Edit space "Test Space" / Custom fields for space / Space roles and state-Transitions (Workflow) for space / Create new state

Create new state
 Cancel

State name

Plugins

State duration

Asset type of which entries will be created or updated using item information

Asset type of which entries will be used to automatically enter item information allow multiple entries

Screen 42: Customise workflow states

3.2.3. Plugins

Workflow State Plugins are written using the Java programming language. They can vary in complexity; a plugin may be as simple as a single Java class containing a few lines of code or complex enough to be a complete library.

Plugins contain custom business logic and are used to perform calculations, update application entities such as items or assets, integrate with legacy or third party applications and more.

Plugin implementation classes must extend one of the existing Calipso plugins such as the `gr.abiss.calipso.plugins.state.AbstractStatePlugin`.

3.2.4. Deadlines

When creating a space, you can assign default values for item and state durations. The durations are expressed in natural language like “1 year 10 days 2 hours 4 minutes 1 seconds 10 milliseconds” or a shorter form like “1y 10d 2h 4m 1s 10ms”. Users may have the right to read and/or update these values according to their role and your workflow configuration. Configuring the “Due in” standard field hidden or read-only you effectively apply a hard deadline policy.

Calipso will automatically send email notifications to users involved in an item 24 hours before a state or overall deadline.


3.2.5. Inventory Types & Asset Management

Under the Options menu, you will find the Inventory Management option.

This is the area designated for the management of the custom attributes that can participate in the creation of an inventory (or asset) type.

Asset types are the “templates” for the registration of different asset entries to the system, either directly or as the result of a process.

/ Options menu / Inventory management

Inventory management 

Manage asset types and their attributes

 Custom attributes

 Inventory types

3.2.5.1. Custom attributes

By selecting the “Custom attributes” link, you will be presented with a menu, allowing you to search existing attributes or create a new one.

/ Options menu / Inventory management / Custom attributes management

Custom attributes management  Search custom attributes  New attribute 

Screen 43: Creating a new custom attribute

Every custom attribute includes the following elements:


Field	Description
Description	The name of the attribute. You should enter a different description for every supported language of the spaces you create.
Type	The possible types are: <ul style="list-style-type: none"> • Text • Number • Date • Drop down list • User • Organization • Country

	<ul style="list-style-type: none"> Asset
Mandatory	check box characterising the specific attribute as mandatory for the successful creation of an asset entry.
Active	check box that allows you to activate / deactivate the attribute
Validation expression list	automatically updated drop-down menu including the validation rules set in your system

Asset attributes can be of the following types:

Field type	Description	Comments
Text	allows the entry of free text	it can be associated with a Validation rule
Number	allows the entry of numbers	it is recommended only for numeric values that may be used in calculations
Date	allows the entry of a date	manually or with the use of the calendar widget
Drop down list	creates a customisable drop-down menu	options are set and ordered by the administrator
User	creates a dynamic drop-down menu	all registered users
Organization	creates a dynamic drop-down menu	options are automatically set to include all Organisations registered in the system
Country	drop-down of Countries	options are shown in the preferred language and are preceded with the international code, as according to ISO 3166 ^x specification
Asset	drop-down of existing asset entries	description should match the asset type name

[/ Options menu / Inventory management / Custom attributes management / New attribute](#)

New attribute  Cancel

Create or edit custom attributes. Fill in the details and select "Submit".

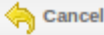
Description	<input type="text"/>	Greek
	<input type="text"/>	English
Type	<input type="text" value="Text"/> ▼	
Mandatory	<input checked="" type="checkbox"/>	
Active	<input checked="" type="checkbox"/>	
Validation expression list	<input type="text" value="None"/> ▼	

Screen 44: Creation of a new custom attribute

In the case that Asset entries are the result of a process, you will have to make sure that:

- the custom fields of the corresponding space match the description of the inventory type fields,
- in the case of drop-down menus, option entries should match in description and order of appearance

/ Options menu / Inventory management / Custom attributes management / Edit custom attribute

Edit custom attribute


Create or edit custom attributes. Fill in the details and select "Submit".

Description	<input type="text" value="Λειτουργικό Σύστημα"/>	Greek	<input type="text" value="Operating System"/>	English
Type	<input type="text" value="Drop down list"/>			
Mandatory	<input type="checkbox"/>			
Active	<input checked="" type="checkbox"/>			
Validation expression list	<input type="text" value="None"/>			

Submit
Reset

List of values

1	GNU/Linux	▲	▼	✎	✖
2	BSD	▲	▼	✎	✖
3	MS Windows	▲	▼	✎	✖
4	Sun Solaris	▲	▼	✎	✖
5	HP-UX	▲	▼	✎	✖
6	IBM AIX	▲	▼	✎	✖

Add value to list: +

Add value to list




<input type="text" value="Apple Mac OS X"/>	Greek	Submit Cancel
<input type="text" value="Apple Mac OS X"/>	English	

Screen 45: Creating an attribute (drop-down)

3.2.5.2. Inventory types

Inventory types are customisable sets of attributes.

/ Options menu / Inventory management / Asset types management

Asset types management  Search asset types  New asset type  Back

Screen 46: Create a new asset type

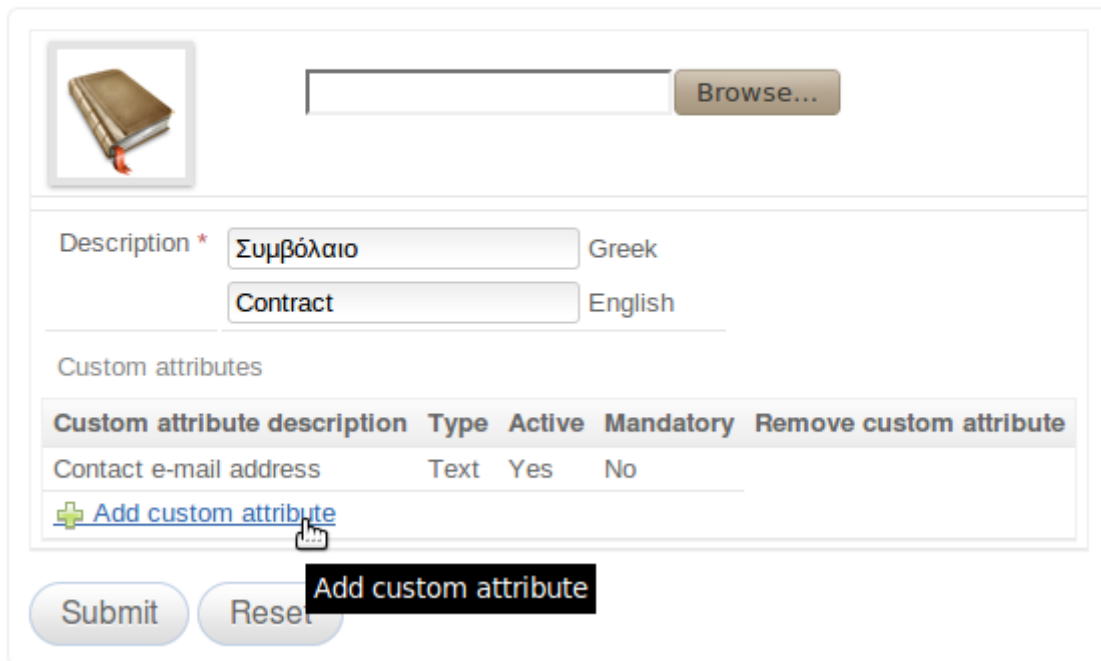
By selecting the “New asset type” you will be presented with the form for the creation of an asset type.

/ Options menu / Inventory management / Asset types management / Edit asset type

Edit asset type

 Cancel

Create new or edit existing asset type. Fill in the details and press "Submit".



Custom attributes

Custom attribute description	Type	Active	Mandatory	Remove custom attribute
Contact e-mail address	Text	Yes	No	

[+ Add custom attribute](#)

Submit Reset **Add custom attribute**

Screen 47: Customise an asset type

After you enter the name of the new asset type, you can click on the “Add custom filed” link to add attributes using the “+” sign (or remove previously added using the “-” sign).

List of custom attributes

7 records found

Description	Type	Mandatory	Active	Edit	Add/Remove from asset type "Contact"
Contact e-mail address	Text	No	Yes		-
Location	Country	No	Yes		-
Operating System	Drop down list	No	Yes		-
Organisation	Organization	No	Yes		-
Start date	Date	No	Yes		+
Team Leader	User	No	Yes		+
Total number of Incidents	Number	No	Yes		+

Screen 48: List of available attributes

References and Links

i **Apache Velocity Engine**

The Apache Velocity Engine is a free open-source templating engine. Velocity permits you to use a simple yet powerful template language to reference objects defined in Java code. It is written in 100% pure Java and can be easily embedded into your own applications. The engine is the core of the Apache Velocity Project (<http://velocity.apache.org/>)

ii **ISO 3166**

ISO 3166 is this commonly accepted International Standard for country names and code elements (http://www.iso.org/iso/country_codes.htm)

iii **Mozilla Firefox**

Mozilla Firefox is a free and open source web browser descended from the Mozilla Application Suite and managed by Mozilla Corporation (www.mozilla.com/firefox)

iv **Google Chrome**

Google Chrome is a web browser developed by Google that uses the WebKit layout engine and application framework (www.google.com/chrome)

v **ISO 3166**

ISO 3166 is this commonly accepted International Standard for country names and code elements (http://www.iso.org/iso/country_codes.htm)

vi **Gravatar.com**

Gravatar.com allows web-based applications and sites display user-provided pictures from a central database. (<http://www.gravatar.com/>)

vii **ISO 3166**

ISO 3166 is this commonly accepted International Standard for country names and code elements (http://www.iso.org/iso/country_codes.htm)

viii **ISO 3166**

ISO 3166 is this commonly accepted International Standard for country names and code elements (http://www.iso.org/iso/country_codes.htm)

ix **ISO 3166**

ISO 3166 is this commonly accepted International Standard for country names and code elements (http://www.iso.org/iso/country_codes.htm)

x **ISO 3166**

ISO 3166 is this commonly accepted International Standard for country names and code elements (http://www.iso.org/iso/country_codes.htm)