WissIntra NG

User Manual

Action Manager

You cannot simplify complex facts at will. However, the way to find the required information must be as simple as possible.

Arne Klein, Head of Software Engineering

User Manual Action Manager WissIntra® NG

For further information and manuals, simply scan the QR code or click the following link:

https://www.kuk-is.de/kundenzentrum.html

Last updated: 2023_11_16_V01

Imprint

k+k information services GmbH
Höhenstraße 16
D - 70736 Fellbach
Tel: +49 711 578813 -0
Fax: +49 711 578813 -77
E-Mail: **Servicedesk@WissIntra.de**
Internet: **https://www.kuk-is.de/wissintra.html**

Table of contents

1 About this manual

This manual contains important hints that will help you to work with WissIntra NG and will support you to reach your goal faster. It is an essential aid for safe operation.

If you still have questions not answered in this manual, please refer to our service desk. You find the details at the end of this manual. For further questions or suggestions, please do not hesitate to contact us.

Gender-specific terms

Since using gender-specific differentiation of female and male terms makes texts hard to read, we will continue without it. By using the generic masculine, we refer to both genders. Therefore, all of these terms should be regarded as gender-neutral in the sense of the Equal Treatment Act.

Intended use

This manual is valid for the software version mentioned here and is not subject to the manufacturer’s modification service. It only describes the specific module. For further information, which is necessary for the use of the different modules of WissIntra NG, you will receive the corresponding manuals for the respective modules.

This manual does not claim to provide a full description. Any use other than described herein is considered improper. The manufacturer shall not be liable for damages caused by incorrect usage of the software, insufficient knowledge of the provided documentation, reasonably foreseeable misuse or other inappropriate actions.

Copyrights

Instructions for use

This manual contains numerous tips, suggestions and instructions. These text elements are represented as follows:

- **Bold**: Prompts and important information are highlighted in **colour and bold**.
- UPPERCASE LETTERS: Uppercase letters (e.g., CTRL + S) indicate shortcuts.
- Bullet-Point: A bullet point • represents instructions and input prompts.

Note: Useful information is marked with a frame and the word Note. This provides helpful information and tips.

Caution: Warnings are marked with a grey background and the word **Caution**. This identifies possible risks.

Definition: Technical terms are marked with a frame and the word **Definition**. This indicates the explanation of terms.

2 Getting Started

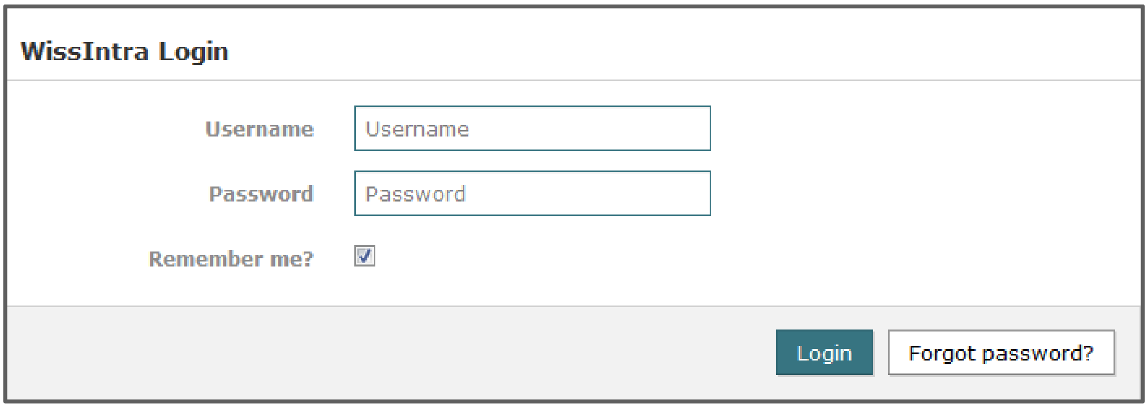
This chapter provides information about the following topics:

- Login to WissIntra NG
- Structure of the operating concept of WissIntra NG
- Handling of the cockpit of WissIntra NG
- Options for the profile settings
- Using the lexicon
- Permission concept

2.1 Login

- Open WissIntra NG in a web browser, such as: the latest Google Chrome, Mozilla Firefox or Microsoft Chromium Edge.

The following WissIntra NG login opens:



- Enter your **Username** and **Password** and click **Login**.

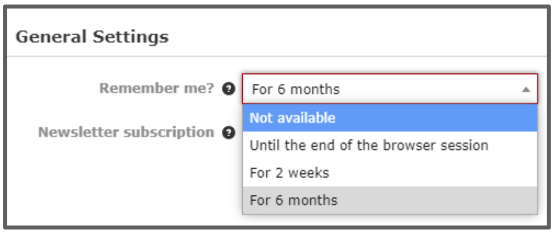
Note: If your user was created via the LDAP interface, please us your Windows password.

Remember me?

- By selecting this check box, you will be logged in automatically the next time you open WissIntra NG.
- The permanent login time can be set up to a maximum of 6 months.

Note: When you delete your browser cookies, you cancel the **Remember me?** in WissIntra NG. You have to login again with the correct data.

- As administrator you can select the duration of the **Remember me?** option. To do this, navigate via the **User** in the navigation bar to the **Settings** and click on **User Settings / Functions**. In the **General settings**, you can select the duration.



Note: After a user has been inactive in WissIntra NG for 20 minutes, a session timeout occurs and the user is temporarily logged out. This will make the previously used licence available for the next user.
The same happens when you log off from your browser by clicking on . The licence will be blocked by the user for additional 20 minutes. You can avoid this by logging out from WissIntra NG.

Forgot password?

If you have forgotten your password, you can request a new password:

- Click on **Forgot password?**
- The following dialog box appears:

- Enter your e-mail address and click on **Send**.
- The new password is sent by e-mail when you are registered as an active user. If your user is inactive, WissIntra NG also informs you about this and refers to your system administrator.

Note: This does not apply to LDAP users and group users.

2.2 Operating concept

WissIntra NG has a new, consistent and user-friendly operating concept, which also allows inexperienced users to work quickly and securely with the software.

Since WissIntra NG opens directly in a web browser, no separate installation is required for individual users. The software works as intuitively as you are used to by surfing the web.

In WissIntra NG information is displayed in different navigation levels.

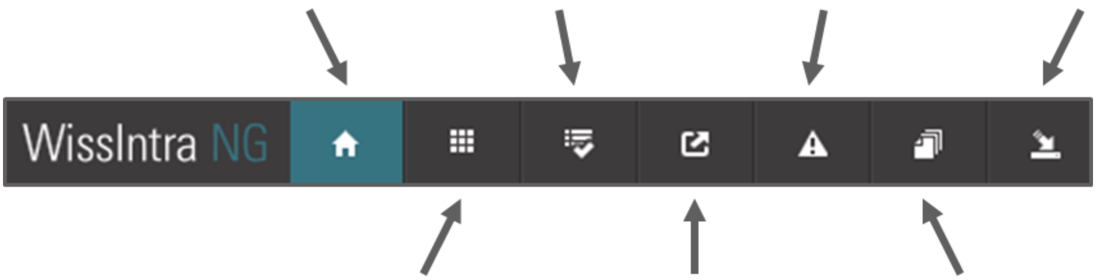
1. Navigation bar — This is where the user navigates between the modules (top level).
2. Module navigation — Here the user navigates within the respective module and selects between different views.
3. Sidebar navigation / Explorer — Here the user navigates within a tree view structure between different lists and tables.

Modules

The various software applications, such as the Process Manager or the Audit Manager, are called modules.

You can access the modules directly in the navigation bar. The appearance may vary depending on which modules you have purchased. The basic module, the Document Manager and the Approval Manager are always included.

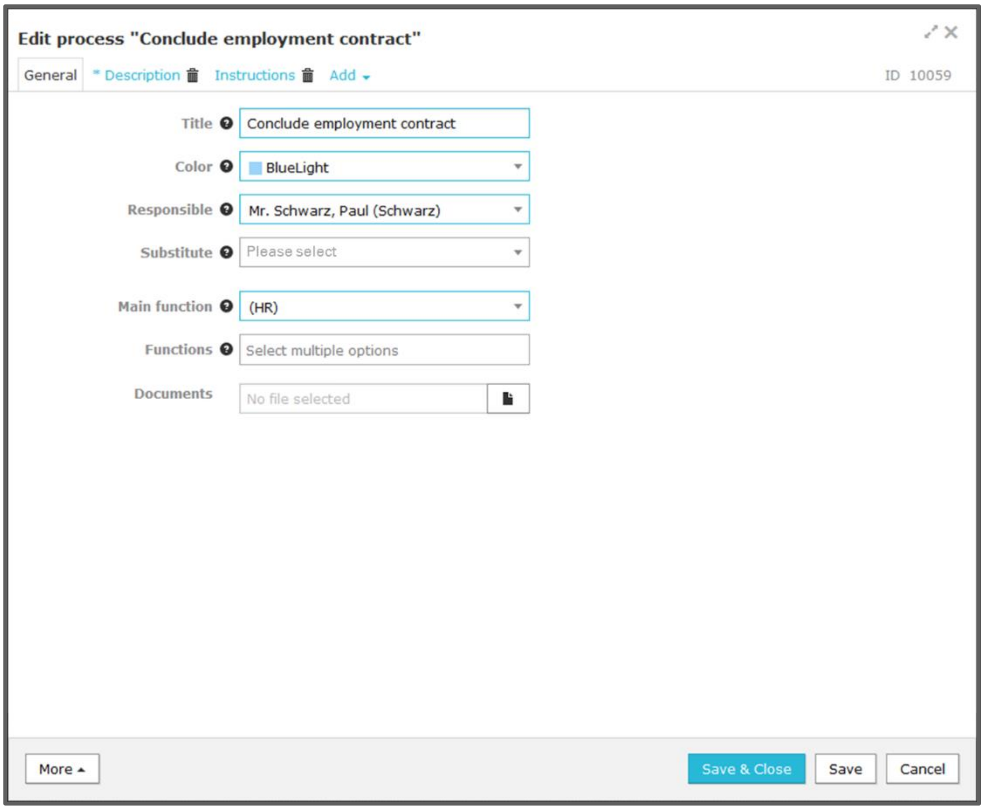
The graphic below shows the Cockpit, the Process Manager, the Audit Manager, the Action Manager, the Document Manager and the Approval Manager from left to right.



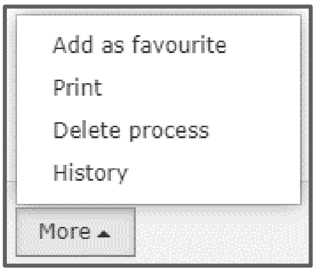
By clicking the respective symbol, the corresponding module opens. You can also click on the name of the module in the drop-down that appears on mouse-over.

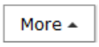
Modals

Dialog windows, which block the background, are called modals. They are usually split into different tabs which can be added for further input.



Note: If changes in a modal have not been saved, the corresponding tabs are marked with a "*". Validation errors are marked by underlining the tab name in red.
When uploading documents that are subject to an approval workflow, the tab name is underlined in purple, and the document itself is displayed in purple, as long as the approval has not been given.



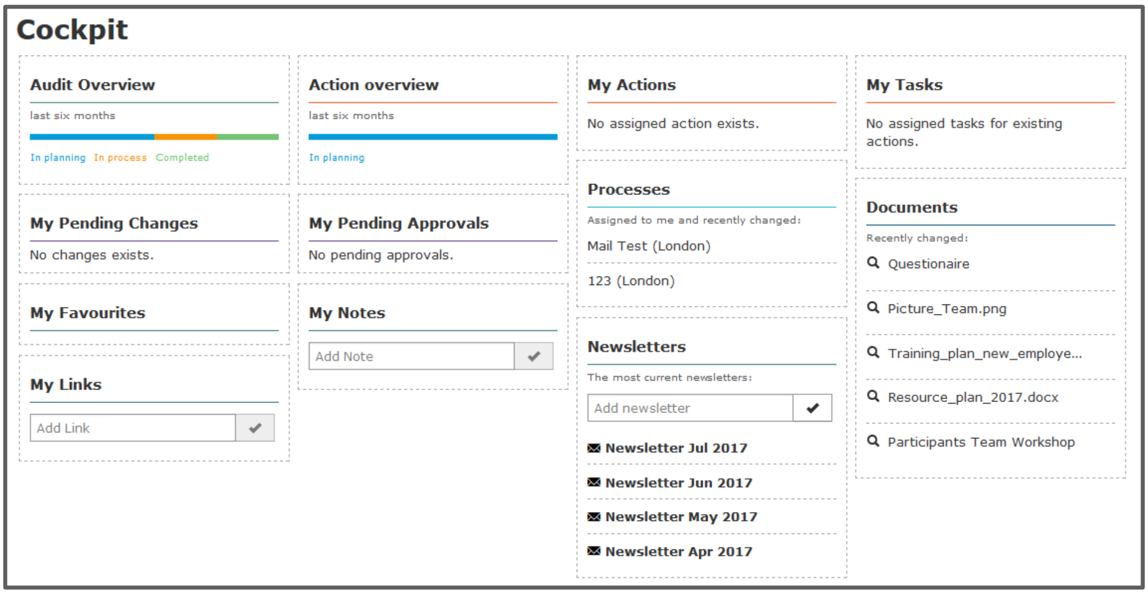
Most modals have the button 

at the bottom left. Here you can find additional functions that you can use in the current context.

2.3 Cockpit

The cockpit is the start page of WissIntra NG, which opens after login.

The cockpit represents the control centre with quick access options that you can assemble and adapt yourself. By clicking on the corresponding links, you can directly access the desired object or process.



Note: The display of the boxes can vary depending on the modules you purchased. The **Documents**, **My Notes**, **My Pending Changes**, **My Pending Approvals** and **My Favourites** are shown all the time.

Navigation bar and cockpit offer the following functions:

Symbol	Name	Explanation
	Process Manager	You can use the Process Manager module to organize your processes. For more information, please refer to the WissIntra NG Process Manager manual.
	Audit Manager	You can use the Audit Manager module to organize your audits. For more information, please refer to the WissIntra NG Audit Manager manual.
	Action Manager	You can use the Action Manager module to organize your activities. For more information, please refer to the WissIntra NG Action Manager manual.
	Risk Manager	You can use the Risk Manager module to organize your risks. For more information, please refer to the WissIntra NG Risk Manager manual.
	Document Manager	You can use the Document Manager module to organize your documents. For more information, please refer to the WissIntra NG Document Manager manual.
	Approval Manager	You can use the Approval Manager for documents to manage changesets that need to be approved.
	Profile settings	Use this icon to access your user profile. There you can set your password, the colour theme, the default folder and default location. You can also see your assigned roles and functions.
	Language	This icon will take you to the selection where of the interface and content language. This is only possible if other languages have been purchased.
	Location	Use this icon to select the location within the drop-down menu. This is only possible if your system has different locations.
	Help	This icon gives you access to the WissIntra NG manuals and information about the program version and Release Notes.
Search	**Search**	Using the search mask, you can search for terms in all modules.

	Processes	Here you can see all modified processes assigned to you. With one click, you can access these processes directly.
	Documents	Here the last five documents that have recently been modified are shown. Clicking on it, you can download these documents. A click on the magnifying glass opens the modal with the details for the document.
	Audit Overview	Here all the audits of the last six months are shown unfiltered in their respective statuses. With one click, you can access this overview directly.
	Action Overview	Here, all the actions of the last six months are shown in their respective statuses. With one click, you can access this overview directly.
	My Actions	Here all the actions of the last six months that have been assigned to you are shown. With one click, you can access this overview directly.
	My Tasks	Here all the tasks assigned to you for existing actions are shown. With one click, you can access the tasks directly.
	My Pending Changes	All the user’s change packages are listed here. The change packages here refer to documents.
	My Pending Approvals	Here all the approvals for documents that are waiting for your decision are shown.
	My Notes	Here you can enter personal notes by using the text field. These notes are only visible for you.
	My Links	Here you can enter personal links by using the text field. These links are only visible for you.
	My Favourites	Here you can see all the favourites you have created. With one click you can access your favourites directly.
	Newsletters	Company-internal information, such as newsletters, can be stored here by the administrator and are visible for each user.

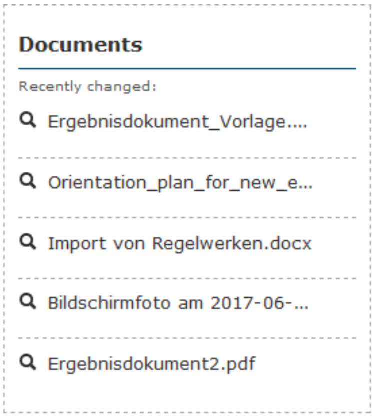
2.3.1 Cockpit boxes

Processes

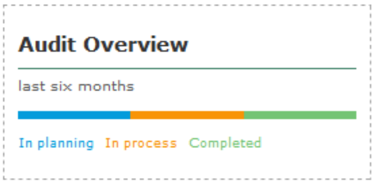
The **Processes** box displays your 5 last modified processes. This means the 5 processes that have recently been changed and to which you are assigned to as process responsible or substitute.

Documents

The box **Documents** shows a list of all recently changed documents for which the user has the appropriate permission. It displays the last five effective changes.



Audit Overview



In the box **Audit Overview** you can see all audits for the current location with their corresponding statuses in a colour bar. You can see all audits that have been completed in the last six months. Audits in planning or in process are shown without any time restriction.

- In planning (blue)
- In process (orange)
- Completed (light green)

Action Overview

This **Action Overview** shows all actions for the appropriate location with their corresponding statuses. You can see all actions that have been checked for effectiveness from the past 6 months. Actions from a different status are shown no matter, which start date they have. For a better overview, they are displayed in a colour bar.

WissIntra NG differentiates the following statuses:

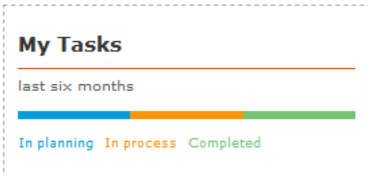
- In planning (blue)
- In process (orange)
- Completed (light green)
- Checked for effectiveness (dark green)

My Actions

In the box **My Actions**, all actions related to the user are listed. This allows a quick and uncomplicated overview of upcoming actions. In addition, here the colour bar also appears for an easier overview:

- In planning (blue)
- In process (orange)
- Completed (light green)
- Checked for effectiveness (dark green)

My Tasks



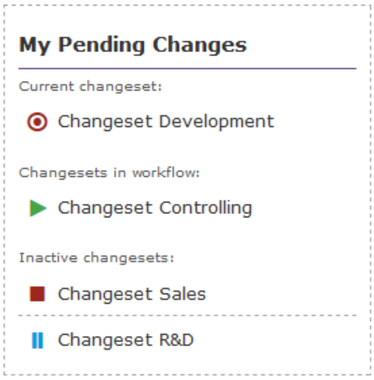
The **My Tasks** box gives you an easy overview about your tasks from the last 6 months as well as future tasks. A colour bar indicates the progress of the tasks:

- In planning (blue)
- In process (orange)
- Completed (light green)

My Pending Changes

The Box **My Pending Changes** shows all of the user's changesets, divided in:

- Current changeset
- Changeset in workflow
- Inactive changeset



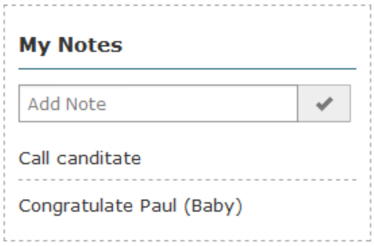
My Pending Approvals

In the Box **My Pending Approvals**, all changesets are listed that still await a decision by the user whether the approval is granted or not.

My Notes

In the box **My Notes**, you can save personal notes.

- Enter your note in the text field.
- Click the checkmark. The note appears under the text field.
- Repeat the procedure to save additional notes.
- Click the pencil icon to edit the note.
- Click on the recycle bin icon to delete the notes.



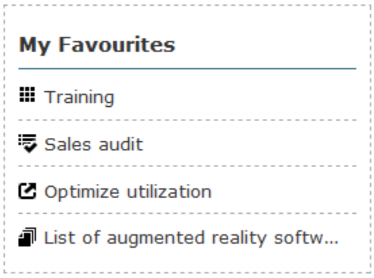
My Links

You can add personal links using the text field **Add Link**.

- Enter the link in the text field.
- Click the checkmark. The link appears under the text field.
- Repeat the procedure to save additional links.
- Click the pencil icon to edit the link.
- Click on the recycle bin icon to delete the link.

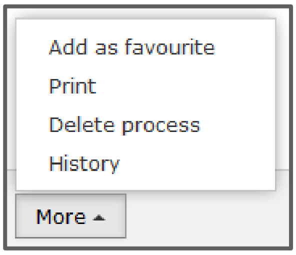
My Favourites

The **My Favourites** box allows you to place links out of processes, audits, actions, risks and documents for direct access.



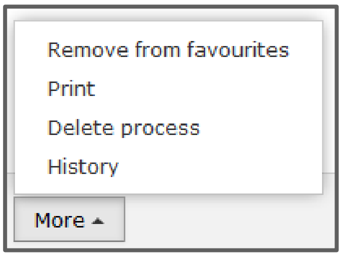
Add as favourite

- Open the process, audit, action, risk or document modal which you want to save as favourite.
- Clicking on the button More opens additional functions.
- Click on **Add as favourite**. A short message confirms that a new favourite has been successfully added to your favourites list in the cockpit.
-



Remove from favourites

- Open the detailed view of the object and navigate to More.
- Click **Remove from favourites**.
- Alternatively, you can also remove the saved favourites directly in the cockpit by clicking on the recycle bin icon .

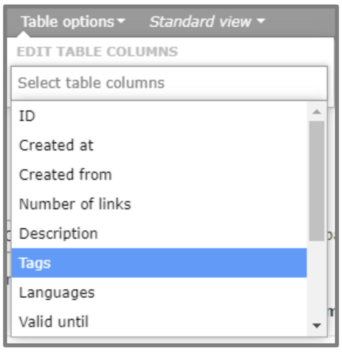


Newsletters

In the box **Newsletters**, company-wide information such as newsletters can be added. This box, if filled, is visible to all WissIntra NG users and is managed by the administrators. The maximum number of entries displayed is limited to five.

2.4 Table options, filters and views

Table options

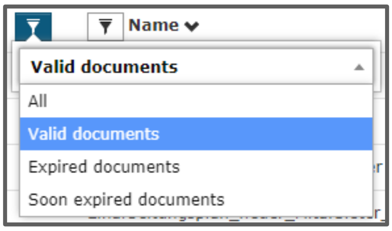


Within the different WissIntra NG modules, where there are table overview pages, you have the possibility to adjust all columns of the tables.

- In the module navigation (submenu), click on **Table options** and select the columns to be displayed.
- Furthermore, you can deselect all columns that are irrelevant for you.
- using drag and drop, you can arrange the columns within the table.

On the right you see the example of the selection for the table columns in the Document Manager.

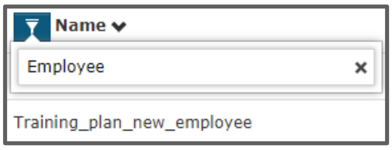
Filter



Each column in a table view can be filtered.

Columns with fixed values:

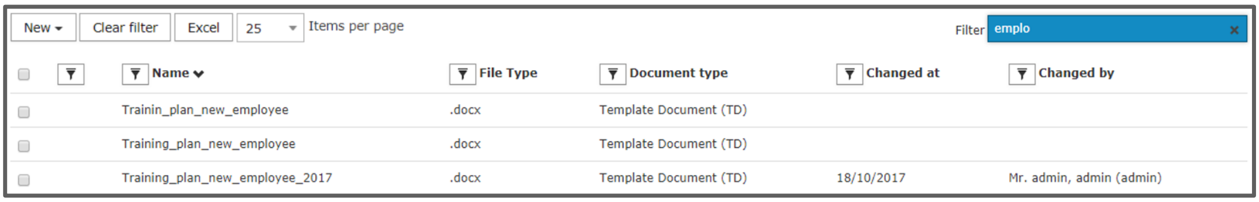
- Click on the filter icon and select a value from the drop-down list.
-



Columns with free content:

- Click on the filter icon and enter the term, number or date by which you want to filter in the free text field.

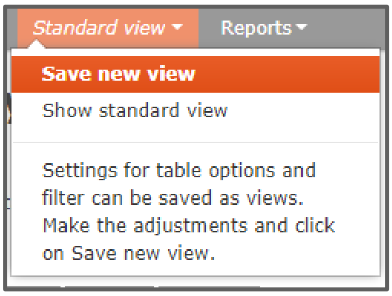
You can also filter across all columns using the general free text field on the right above the table.



Views

The table columns and filters you have set are automatically saved by WissIntra NG for similar table views, so that, for example, when you switch between different document folders, the same columns are always displayed.

If you have not made any adjustments to the table columns or filters, you see the table in the **Standard view**.



Show standard view

- Move the mouse in the submenu to **Standard view** and click on **Show standard view** to reset all additionally selected table columns and filters.

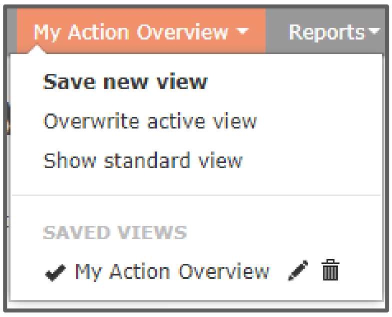
Save new view

You can also save your own views for similar tables.

- To do this, select the columns that you want to display in a table and/or filter for one or more values.
- Go to ***Standard view*** and click on **Save new view**.
- Enter a name and **Save** the view.

The view you have saved is immediately active and accessible via the submenu.

You can rename the view using the pencil icon and delete it with the recycle bin icon .



Overwrite active view

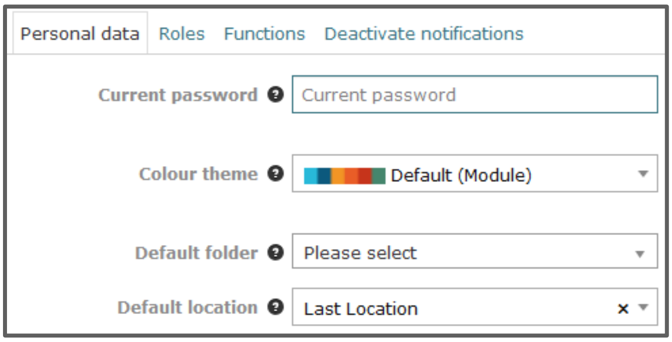
If you want to change a view that has already been saved, you can overwrite the view.

- Activate the saved view and make the desired changes to the table columns and filters.
- Click on **Overwrite active view**.
- If necessary, rename the view and click on **Save**.

2.5 Profile settings

Use the icon to access the profile settings.

- By clicking on **Profile settings** the following modal opens.



In this modal, you will find three or four tabs.

In the first tab **Personal data** you can make the settings for **Password**, **Colour theme**, **Default folder** and **Default location**.

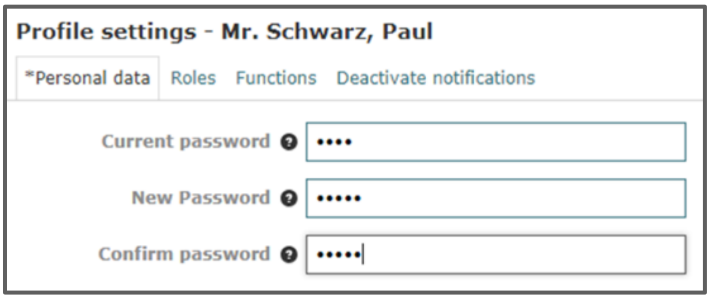
In the tabs **Roles** and **Functions**, the user can see which roles or functions are assigned to him within the respective locations.

In the tab **Deactivate notifications**, you have the option to deactivate the e-mail notifications sent out by WissIntra NG. You can see this tab only if your administrator has activated this feature. You can do this setting for each module separately by selecting the check box of the module from which you do not want to receive any notifications any more.

Note: If the tab **Deactivate notifications** is not available, contact your administrator.

Change password

- By clicking on **Current password** two new fields appear: **New password** and **Confirm password**.
- Fill out the fields with the current password and a new password.
- Save your change.

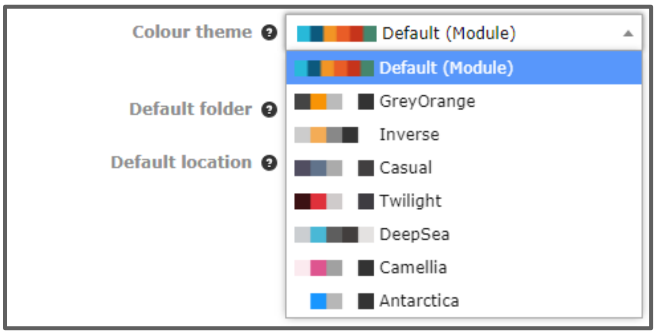


Note: This does not apply to LDAP users since they use the Windows password to login. This also does not apply to group users, since this password is always assigned by the administrator.

Set the colour theme

WissIntra NG offers you a selection of different colour themes. By using the colour theme, each user can customize his own interface.

- Select the desired colour theme in the drop-down menu.
- **Save** your choice.

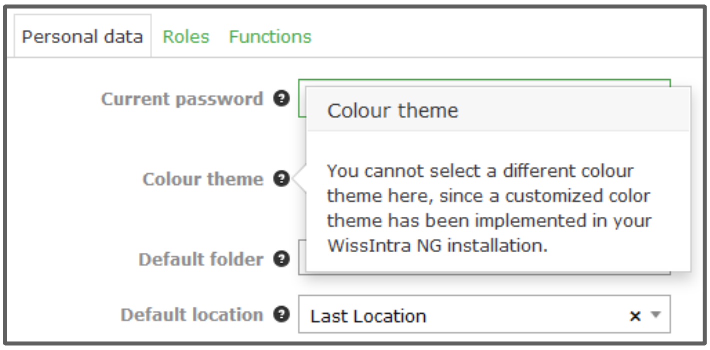


Note: The **Default (Module)** is selected from the beginning. Here each module has its own colour.

Customizing the WissIntra NG user interface

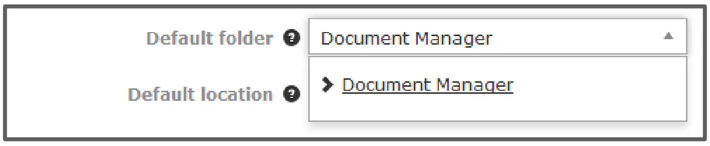
We offer you the possibility to customize the WissIntra NG user interface according to your wishes. You can find the information in the corresponding PDF in our Customer Centre.

Once you use your own customized colour theme, users of your system will no longer be able to select another colour theme.



Select Default folder

You have the option to change the default folder "Document Manager" which is set by WissIntra. This folder always opens the folder you have selected, both when starting the Document Manager and when selecting or uploading documents. This will help you navigate faster within the document manager.



- Open the drop-down menu and navigate with to the desired folder.
- **Save** your selection.

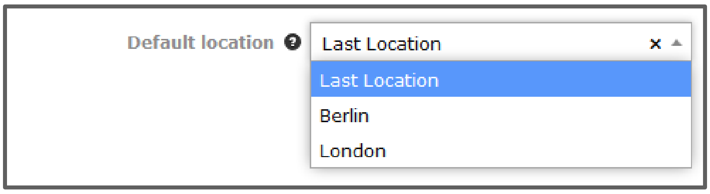
Note: For group users, the default folder can only be set by the administrator. If you are working with a group user in WissIntra NG, you can see in the profile settings which folder was chosen by your administrator.

Note: Once the selected default folder is deleted, the root folder **Document Manager** is automatically set as the default folder.

Note: The ability to select a different folder as the default folder is only available if you have sufficient permissions in the document manager.

Select the default location

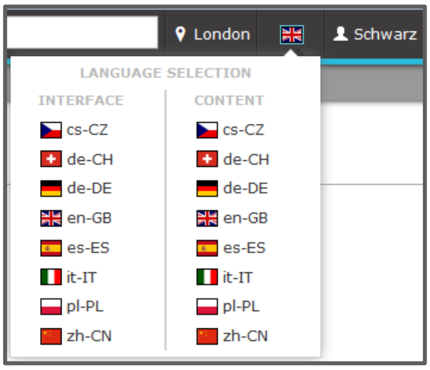
If you are able to access multiple locations in your system, you have the option to select a default location that will be opened each time you log in. Alternatively, you can choose that WissIntra NG always opens the location that was used at last.



- Select the desired location from the drop-down menu.
- **Save** your selection.

Note: If a default location is deleted, the option **Last Location** is automatically set here.

2.6 Language

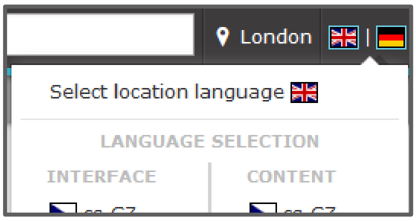


Use the flag icon to access the language selection.

You have the option to select both, the language for the interface and the content.

This option is useful if, for example, a company has one location in Germany and one in England. Thus, an employee of the German location can display the content of the English location but continue working in the German interface language.

As soon as you have made such a selection, the option **Select location language** is displayed. This option changes both, interface and content to the language assigned to the specific location.

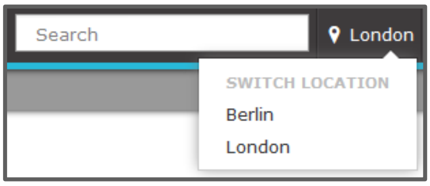


Note: The languages displayed here depend on your purchased licence.

2.7 Location

When you move the mouse over the current location, a drop-down menu appears. You can **switch location** if you have multiple ones and if you have the permission to see them.

- Click on the desired location.



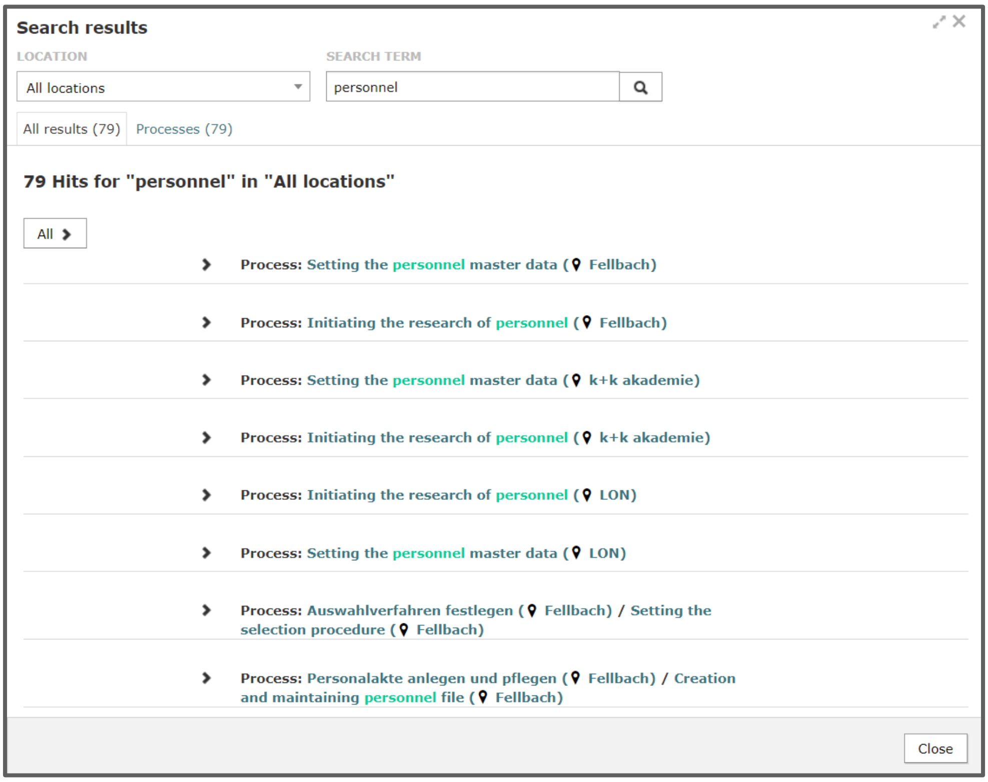
Note: Changing location is only available if you have several locations. This depends on your purchased licence. The administrator sets the parameters for the location.

2.8 Search

The **Search** in the navigation bar allows you to search for terms across all modules and locations in which you have the permission to work.

- Enter the desired term in the search field.
- Confirm by pressing **Enter**.

A modal opens where the search results are displayed and the term you searched for is highlighted in green. You can use the tabs to select whether you want to see **All results** or only those for one of the modules.
Here, e.g. the modal with the results for the search term “personnel”.



Note: The search term must contain at a minimum 3 characters.

The search can be further refined. You can choose between the following three options:

1. Wildcard search

The wildcard search uses placeholders for single or multiple characters within the terms.

- Single character search with "?":
  Here the "?" is used as a placeholder. For example, if you search for the terms "test", "text" or "tester", use the search term "te?t"
- Multiple character search with "*":
  Here the "*" is used as a placeholder when you search for one or more characters. For example, if you search for "process*" you will get terms like "process", "process description" or "process step"; if you search for "*process" you will also get "process" as well as terms like "main process".
  When you use the placeholder before and after the search term, e.g. "*process*", you will find all composite terms no matter if the additive term is before or after the search term.

2. Fuzzy search

The fuzzy search is based on the Levenshtein algorithm. To use this search, use "~" at the end of a single word.

Note: Press ALT GR + */+/~ to generate the tilde symbol (~).

- If you search for example for a term that sounds like „teacher", you can use the Fuzzy search with "teacher~". The search result contains terms like "teacher", "teaching", etc.
  The desired similarity can be specified with a value between 0 and 1. The closer the value is to 1, the more similar the terms will be.
  If nothing is specified, the default setting is 0.5.

3. Booster search

When searching for several words, a term can be boosted. The booster search allows you to control the relevance of a word. The higher the boost, the more relevant the search term is.

To boost a term, use the "^" symbol and a boost factor at the end of the term.

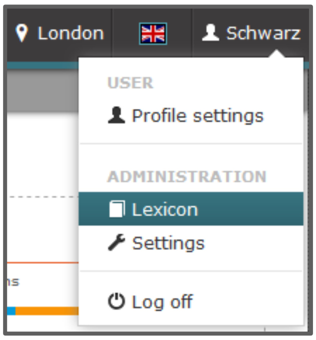
- For example, you search for "satisfied customer" and you want to increase the relevance of the term "satisfied", you can boost it with the "^" symbol and a boost factor, e.g. "satisfied^4". Thus, "satisfied" is 4 times more relevant for the search than "customer".
  The boost factor has to be always positive (>0).

Note: As of October 2021, the default search behaviour in WissIntra NG changed in a way that the system does not open a modal dialog directly when there is only one search result found. Only when that result exactly matches the ID of e.g. a process, the process modal will be opened immediately. In all other cases, the system displays the usual search results page.

Note: If your search yields no results, you can try to change location and retry.

Note: Search terms with special characters like "-", "+" or "_" can be found in the search now. WissIntra is able to search for the complete word combination (e.g., “kick-off”) and display the correct search result. Working with two special characters, for example "task-*", is also possible.

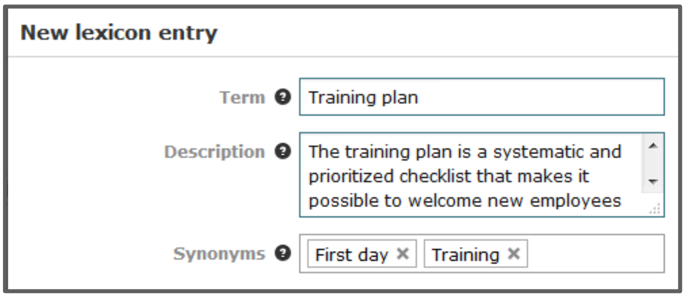
2.9 Lexicon



In WissIntra NG, all users with a Power User licence can create terms in the lexicon. Users with Read User licence can only read the lexicon. Terms that are inserted in the lexicon appear in dotted underline in free text fields. If you move your mouse over the term, the description appears.

There are two ways of creating a lexicon term:

- Navigate to the user and open the lexicon.
- You will see an overview of all existing terms in WissIntra NG.
- Use the button Excel to export all terms into an Excel list.
- Use the button New to create a new term.
- Enter the term or an abbreviation, such as e.g. “CIP“ in the field **Term**. In the **Description**, insert the text you want to appear on mouse-over. In the field **Synonyms**, you can enter terms which have the same meaning or similar use. The same description will be shown on mouse-over as well for these terms.



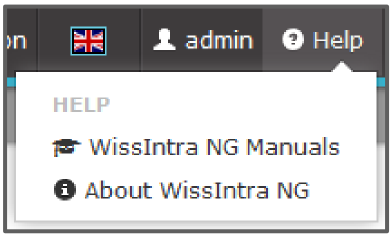
Alternatively, a lexicon entry can be made directly via each free text field:

- In the toolbar of free text fields, you can directly insert a term by clicking on the left icon shown here. By clicking on the right icon, you access the lexicon where you can proceed as described above.

Note: Please note that the lexicon is language-specific. The terms have to be maintained separately for each content language.

2.10 Help

The **Help** button in the navigation bar gives you direct access to the WissIntra NG manuals as well as to information about your version and the latest version of the program.

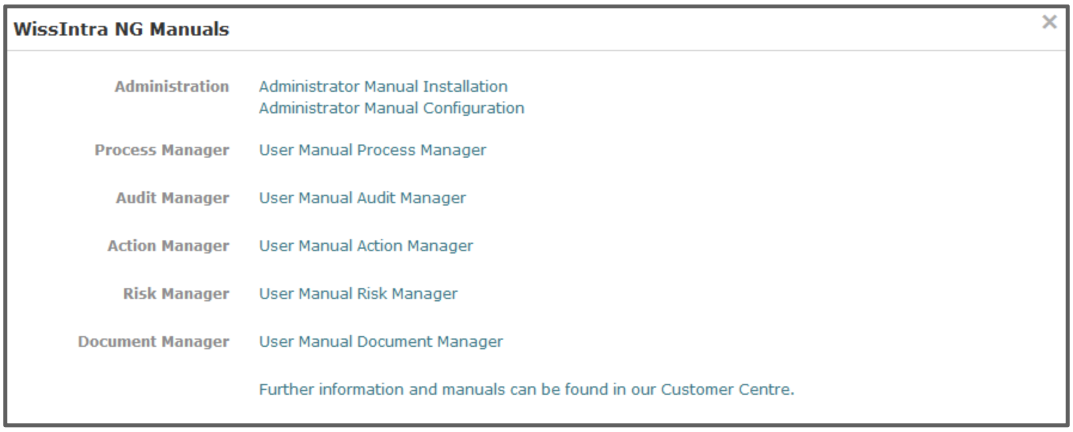


WissIntra NG Manuals

- Navigate to **Help** and click on **WissIntra NG Manuals**.

A modal opens in which you will find all manuals for the WissIntra NG modules and for administrators.

You can find further information if you follow the link to our Customer Centre.

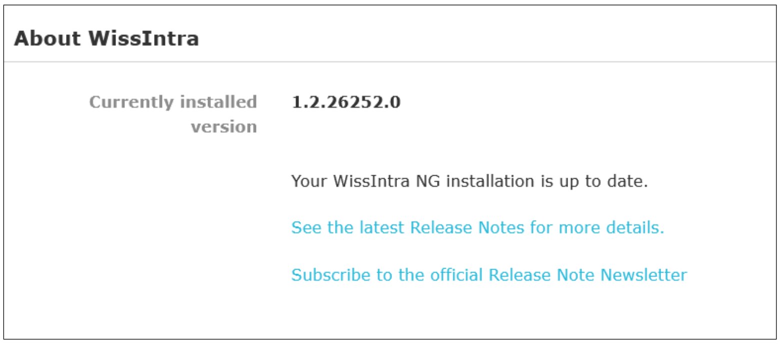


About WissIntra NG

- Navigate to **Help** and click on **About WissIntra NG**.

A modal opens with information about the currently installed version and whether newer versions of WissIntra NG are available.

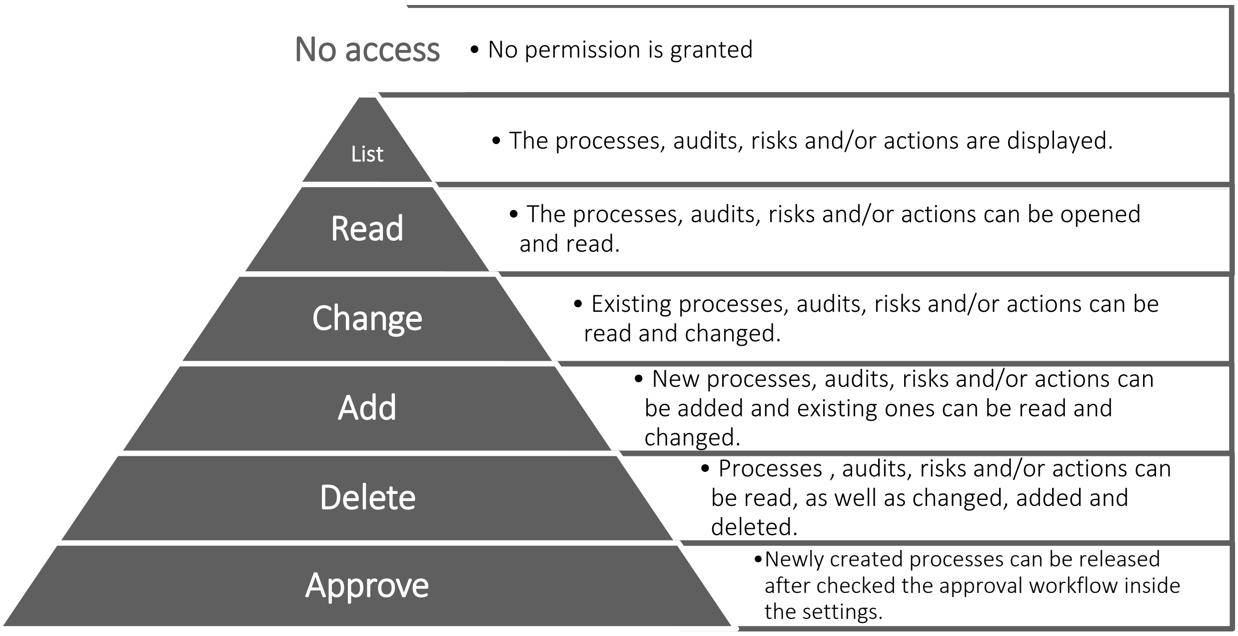
In addition, a link will take you directly to the current Release Notes. If your administrator activated **Newsletter Subscription** option in User Settings, a link will show enabling you to subscribe to the official Release Notes Newsletter.



Note: If you cannot see the link enabling subscription to the official Release Notes Newsletter, please contact your administrator.

2.11 Permission concept

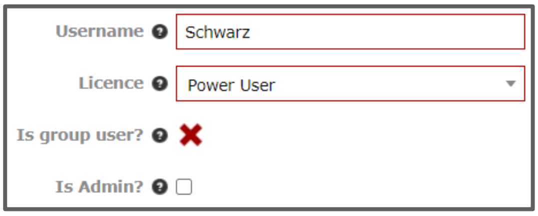
Access to WissIntra is given via permissions. There are six independent module permissions. The pyramid describes the increasing permissions from top to bottom:



Note: Permissions are assigned independently. Consider that the permission **Delete** requires at least the permission **List** and **Read**.

WissIntra NG distinguishes between Read User and Power User licence. They allow different access to the modules. As an administrator you can select the corresponding licence in the user administration and control the assignment:

If you select the **Read User**, the user is given access to WissIntra NG with a Read User licence. By selecting **Power User** he will log in with a Power User licence.



In the user administration, the user is granted a global permission without restriction by clicking the check box **Is Admin?**. The prerequisite for this is the access via Power User licence.

The following graphic gives an overview of the possible accesses:

With a read user license, the user with appropriate authorization sees the objects listed in the process manager, risk manager and the audit manager in the standard setting, and can open them.

With a Power User licence, the user can initially get all permissions.

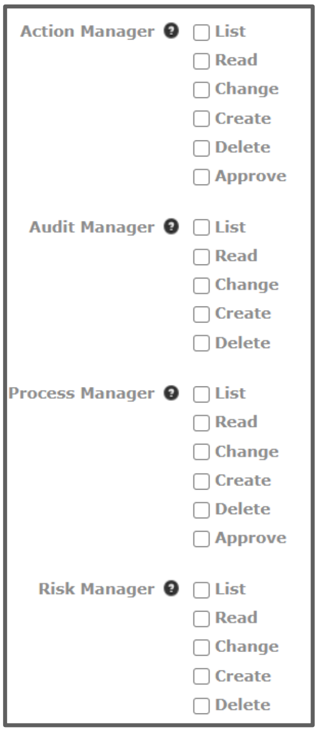
Therefore, you should develop an individual permission concept, which meets your company-specific requirements.

Note: Permissions are given by assigning users to specific roles.

By defining roles, you control the access to the modules and the locations.

To grant permissions, you first need to create a role that you can name freely. Subsequently, the required permissions are granted to this role for each module. The permissions are not ordered hierarchically and are independent from each other.

This role can be assigned to users at one or more locations. It is always assigned individually. This also applies to group and LDAP users.



Note: The permissions are granted by the administrator.

You can see two examples here for clarification:

- The role „viewer" with permission to read within the Process Manager can for example be given to all users that have a Read User licence access to WissIntra NG and only need to read processes.
- Another role could be the „action planner" who can create actions but cannot further edit them.

Note: If a user is responsible for a process in WissIntra NG, he can edit and delete it or create new processes in a deeper level. This is possible if the user has a Power User licence but has only received a read permission for this module.

- If you create a role „process keeper" with the permission to list, read and change within the Process Manager, the user assigned to this role can access the Process Manager and change processes. For further modules, this role has no other permission. Thus, the user has no access to other modules.
  Here the process responsible has a special permission. He can also create underlying levels and has all permissions for the child processes.
- While creating roles, please consider that not every combination of access rights is useful, like e.g. a role named "delete" with the permission to delete but without permission to read.

Note: Before migrating / installing WissIntra NG, please develop an individual permission concept that meets your requirements. If you have any questions, please do not hesitate to contact us.

Note: In the following manual, it is assumed that the respective user has the appropriate permission.

3 Short introduction Action Manager

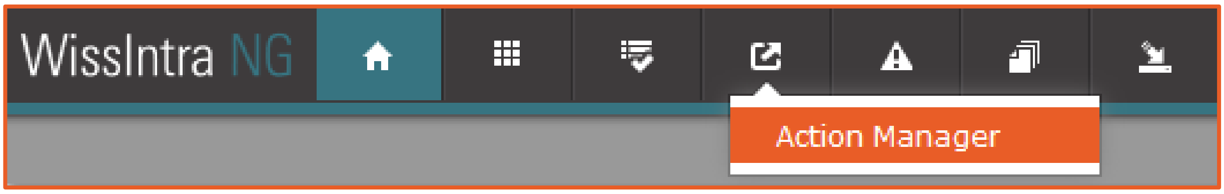
In this chapter you will learn in short:

- How to start the Action Manager
- How the WissIntra NG Action Manager works.
- What is the difference between an action programme, an action and a task.
- Which special permissions are available in the Action Manager.
- What settings for getting notifications you can make in WissIntra NG.

3.1 Starting the Action Manager

- Click on the Action Manager icon in the navigation bar, or click on the drop-down with the module name which appears on mouse-over.

The Action Manager will be started and you can work with it.



3.2 Functionality and structure of the Action Manager

The basis of the Action Manager is the action programme that contains all the actions and tasks.

When starting the Action Manager, you will see an overview of all actions, tasks and action programmes in the sidebar on the left.

The list is structured as follows:

- **Action Overview**: My Actions, Current actions, Future actions, Past actions, Soon overdue actions, Overdue actions, Recycle bin (for administrators)
- **Task overview**: My Tasks, Current tasks, Future tasks, Past tasks, Soon overdue tasks, Overdue tasks
- **Action programmes**: Here, all created action programmes are listed.

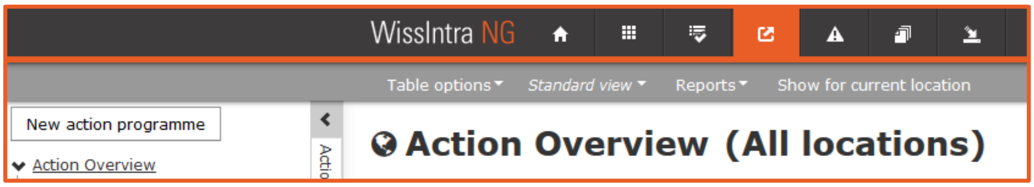
3.2.1 Showing actions for all locations

Within the Action Overview and the subordinate views, you can display the actions for the currently selected location or for all locations.

- Click on the button **Show for all locations** in the submenu.

You will receive a list of actions from the active view (Action Overview, My actions, etc.) for all locations.

As an indicator that you are in the view for all locations, you see on the one hand the globe before and on the other hand the note **(All locations)** after the table headline.



- Click on the button **Show for current location** in the submenu to return to the view for the currently selected location.

> **Note:** In the view for all locations, you can use the Table options to display the column Action path. It shows in which location and in which action programme the action is located.

3.3 WissIntra NG Action Manager items

Action programme

In WissIntra NG, actions are created within action programmes. These programmes provide clarity and simplify the handling of recurring actions. In the sidebar on the left, you can generate a **New action programme**.

Action

The actions themselves are created within individual action programmes. It is also possible to trigger actions directly in the Audit Manager or the Risk Manager.

An action includes the tabs **Finding**, **Cause**, **Tasks** and **Effectiveness**. By filling these tabs you can make a detailed description of the action.

Task

Tasks can be created within an action. This enables a better structuring of the entire action. The tasks themselves can be subdivided into a main task with several tasks to achieve a higher level of detail.

3.4 Special permissions for responsible users

In the previous chapter you learned about the permission concept and the correct assignment of users to the corresponding roles. However, in the WissIntra NG a user without the appropriate role and permission for the Action Manager can get access to it.

Note: If a WissIntra NG user has no permission to access the Action Manager but gets assigned to actions, main tasks or tasks, he can partially edit the objects assigned to him.

These are the options for assigning special permissions for the Action Manager:

- User without any access is assigned to a task:
  If a user is responsible for a task, he can change the status of this task, attach documents, set a reminder and add comments.
- User without any access is assigned to a main task:
  If a user is responsible for a main task, he can change the status of this main task, attach documents, set a reminder and add comments. Furthermore, he can add additional tasks to the action and assign them to other users.
- User without any access is assigned to an action:
  If the user is responsible for an action, he has all the permissions for it and can do everything mentioned above. However, he is not able to delete the action.

3.5 Administrator Settings

Notifications

The WissIntra NG Action Manager allows you to configure notifications.

It is possible to send notifications regarding actions when the following events occur:

- creation
- change
- deletion
- before the expiration of an action
- when the status changes
- at the expiration of an action
- when the expiration date was changed
- when the check for effectiveness is done
- change of an attached document

In addition to notifications for actions, notifications can also be sent for tasks created within an action for the following events:

- creation
- change
- deletion
- completion
- change of an attached document
- when the reminder date is achieved
- at the expiration of a task
- creation of a comment

These notifications can be send to a given role, individual users or external e-mail addresses.

For more information, please refer to the "User Manual Configuration", as these settings have to be done by an administrator.

Note: If you activate the settings for scheduled notifications during operation of WissIntra NG, e-mails are sent for which associated action can be up to 2 weeks ago. Older actions are not considered.
In the Action Manager this applies to the notifications prior to expiration and at expiration of an action and to the notifications at achieved reminder date and at expiration of a task.

4 The action programme

In WissIntra NG actions are assigned to an action programme. An action programme is like a folder containing one or more actions and possibly other action programmes. Before you can create an action, you first need an action programme.

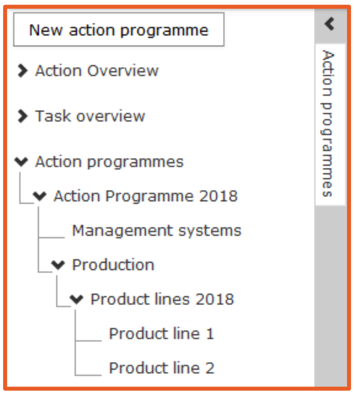
Note: When creating action programmes, it is advisable to establish a procedure for arranging the programmes. For example, it might be helpful for a company to arrange the action programmes by year and the child programmes by departments.

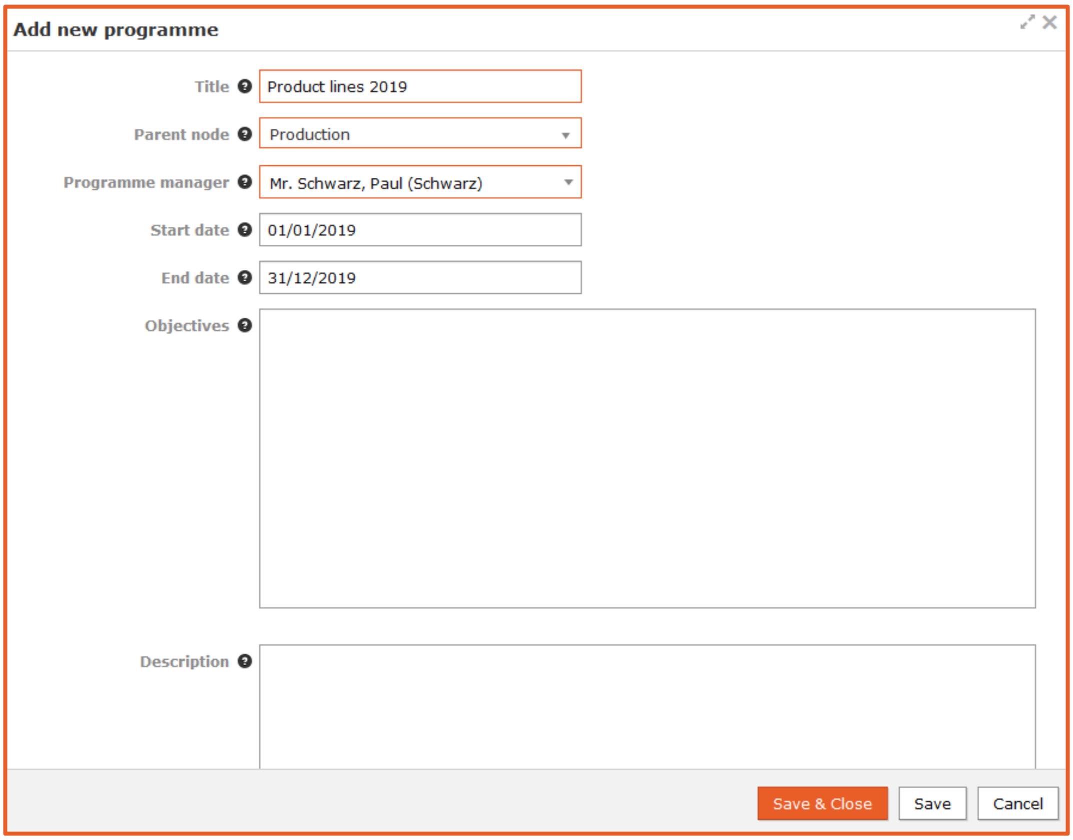
4.1 Create an action programme

To create an action programme, proceed as follows:

- In the sidebar on the left, click on New action programme .

In the modal that opens, the first three fields are mandatory, which is indicated by a coloured border.





- Enter a descriptive name in the field **Title**. Note, that you can assign child programmes so that the name should be chosen accordingly.
- In the field **Parent node** you specify the hierarchy level in which the action programme should be located. Use the arrow to navigate to the appropriate action programme within the active location.
- The field **Programme manager** is a drop-down, in which the responsible employee has to be selected. The programme manager's task is to coordinate the action programme.
- You can select a **Start** and **End date**.
- In the field **Objectives**, you can enter the objectives for the action programme. These objectives may relate to the outcome, the process, the requirements or the risks.
- The field **Description** allows you to enter any further information about the action programme.
- **Save** the changes and close the modal.

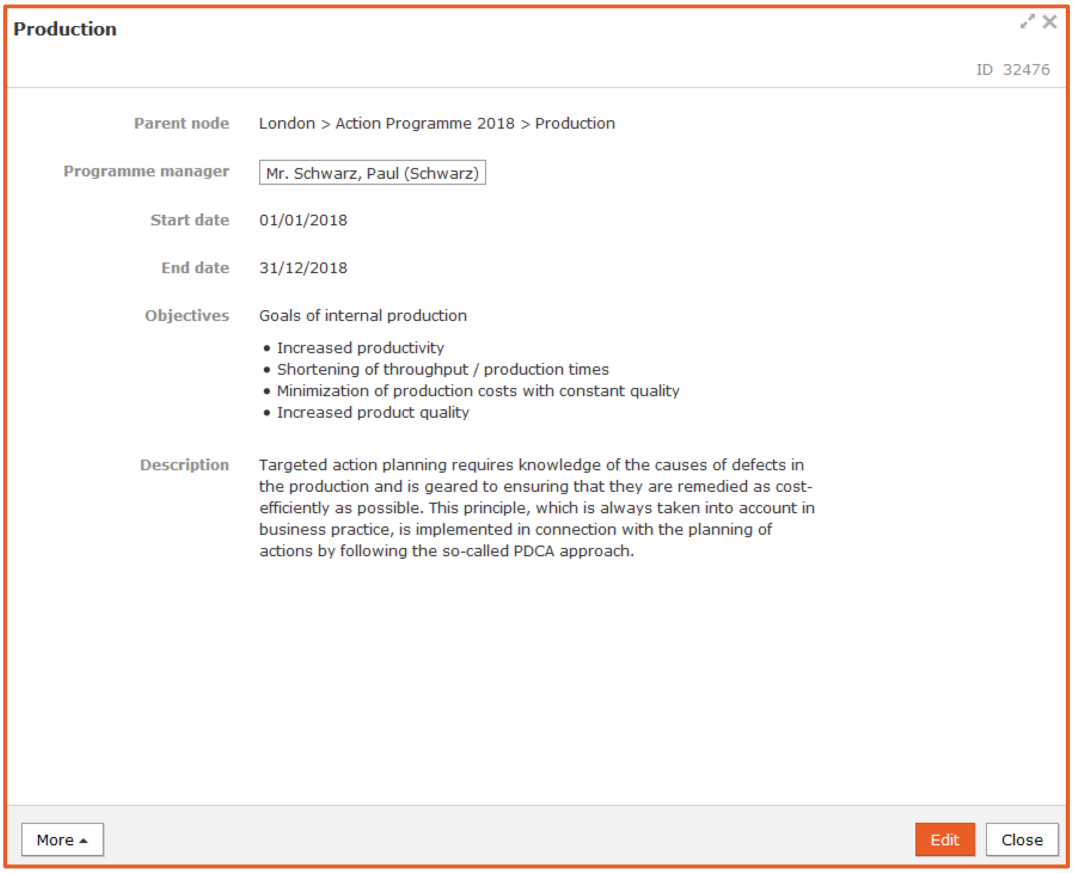
The action programme is created and appears in the sidebar on the left. The corresponding actions can now be assigned to this programme.

4.2 Edit an action programme

Once you have created the action programme, you can edit it to make changes.

- Navigate with the mouse to the desired programme in the sidebar and click on the magnifying glass that appears on mouse-over.

The following modal opens.

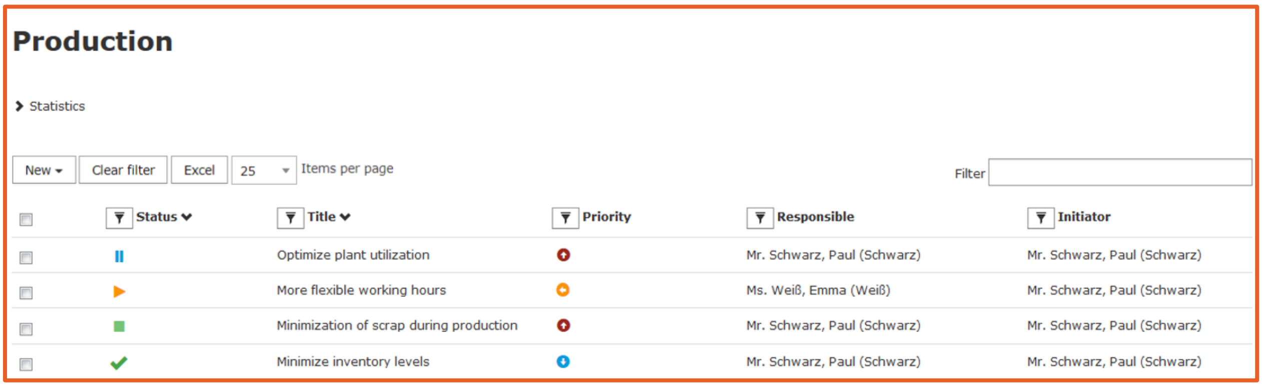


- To edit the action programme, click on Edit .

This takes you to the edit mode of the modal and allows you to make changes.

- Save it by clicking on Save & Close .

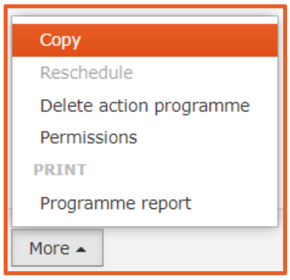
- If you click on the action programme itself, a list of all actions contained in this programme opens. These appear on the right side of the screen.



4.3 Copy an action programme

WissIntra NG offers the possibility of copying complete action programmes. In this way, recurring actions can be transferred to the next processing cycle, for example the next fiscal year, without having to create them again.

- Open the action programme via the magnifying glass and navigate to More .
- Click on **Copy**.



Note: You can copy the action in the detail view as well as in the edit mode.

A submodal opens, which allows you to copy and modify the action programme.

- In the field **New programme name** you can modify the title. For example, you can enter the current year here.
- By selecting the **Parent node**, you can adjust the hierarchy level of the action programme.
- The field **Start date** can be used to specify the start of the action programme.
- Below this, under **Reschedule by**, you can see the period of rescheduling.

Note: The option **Reschedule by** can only be used if both, the action programme and all child programmes, have a start date.

By selecting or deselecting the checkboxes, you have the possibility to decide:

- Whether you want to **Copy child programmes** as well, including the action contained therein.
- Whether WissIntra NG should **Send notifications** to the users defined in the settings for creating actions.

Note: When you copy an action programme, all actions, including those that have already been completed, are in the status **In planning**. The comments of the original programme are not copied, and the check for effectiveness is pending again.

Note: If you select **Send notifications?**, you allow WissIntra NG to send messages regarding the action programmes. However, these notifications are only sent according to the settings made by the administrator.

- Click on **Save** to save all the changes made.

The copied action programme opens in edit mode, so that any changes can still be done.

- Click on **Save & Close** to complete the copying.

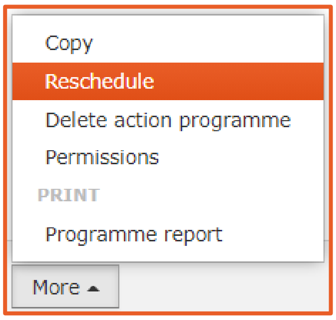
The new action programme and the new programme appears in the sidebar on the left.

Note: Please note that copying an action programme or an action may take some time due to technical processes in the background. It may take a few minutes to display the copied objects.

Note: Please remember that after copying an action programme, it is independent of the original programme and subsequent changes are not adopted.

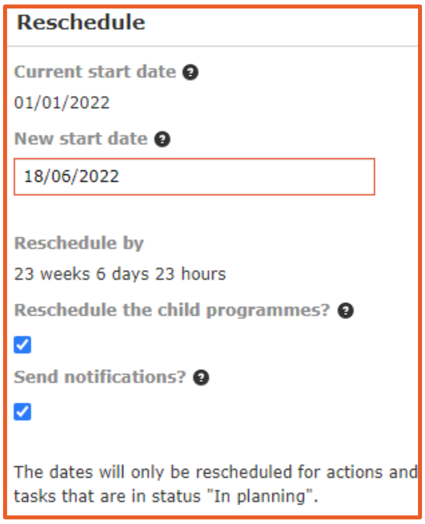
4.4 Reschedule an action programme

If you have assigned a start and/or end date to an action programme, you can reschedule it.



- Open the action programme in edit mode, navigate to the button More and select **Reschedule**.
- The opened submodal shows the **Current start date** and offers you the possibility to enter a **New start date**.
- The time difference between the two dates is displayed under **Reschedule by**.

With this, you can reschedule all dates of all actions and tasks with the status **In planning** assigned to the action programme.



- You can also select the option **Reschedule the child programmes?**, as long as the child programmes have a start date.
- And you can select **Send notifications?** to inform the users.
- Click on Save to save the changes.

4.5 Delete an action programme

To delete an action programme, proceed as follows:

- Open the modal of the action programme with the magnifying glass .
- Navigate to the button More and select **Delete action programme**.
- Confirm the confirmation prompt.

Note: Note that action programmes can only be deleted if there are no more actions in these programmes.

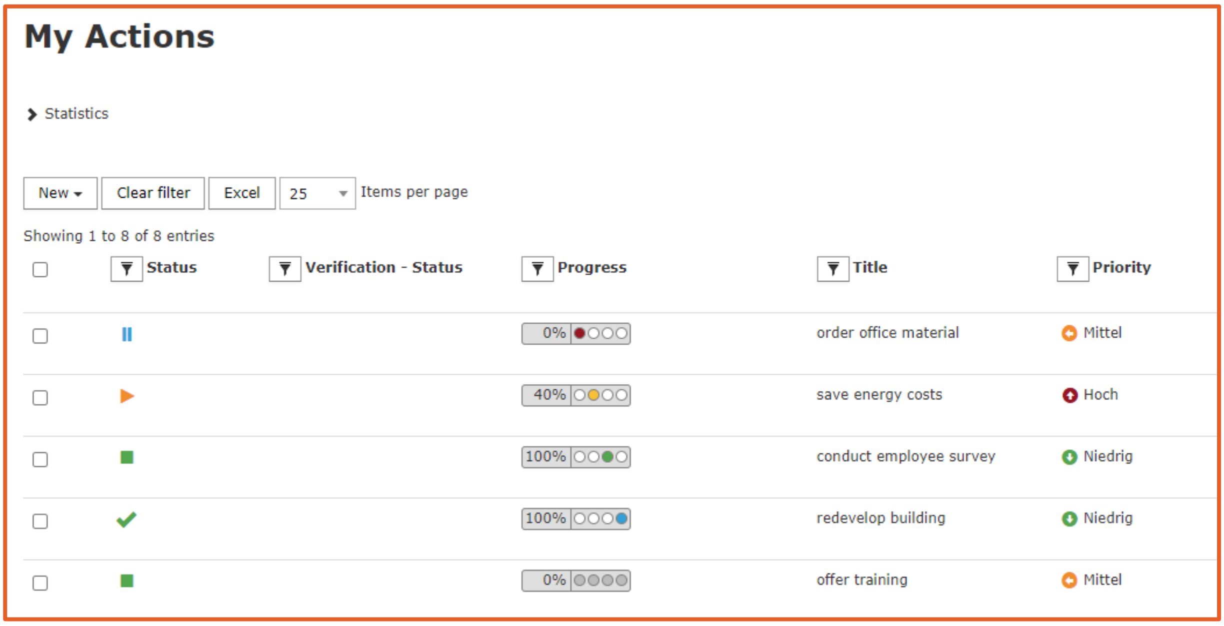
Note: If the Recycle bin for actions is activated and the last action within an action programme has been deleted, that means has been moved to the recycle bin, the deleted action programme can be deleted. However, the deleted actions from this action programme cannot be restored afterwards!

5 The action

Once an action programme has been created, it can be filled with actions. An action is a targeted activity that is intended to lead to the prevention, avoidance, correction or improvement of a particular situation.

5.1 Create an action

To create an action, proceed as follows:



- In the sidebar, select an action programme in which the new action should be created. Open the action programme by clicking on it.
- A table appears with the actions that may have been already created.

- To create a new action, click on the button New which opens a modal in edit mode.
- Fill this modal as described below to create the new actions.
- Use the button Save & Close to complete the process.

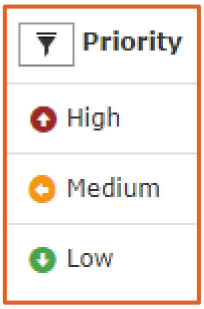
5.1.1 Finding

When you open or create an action, the modal opens with the tab **Finding**. Here, all information about the status quo are described. The mandatory fields are marked with a coloured border.

- Start by giving the action a meaningful **Title** that describes the action. It has proven to be useful to use at least a noun in combination with a verb as a unique title.

The **Actiontype** categorizes the action, this field is automatically filled by WissIntra NG.

In the field **Origin**, you can see where the action was triggered. If the action was triggered in the Audit or Risk Manager, there is a link that points directly to the corresponding audit or risk.



- In the mandatory field **Priority** you assign the action to the importance it has for achieving the company's goals. You can differentiate between Low, Medium and High.

After saving the action the following icons indicate the priority in the table view:

- High priority
- Medium priority
- Low priority

- In the field **Category**, you can assign the action to a category of your own choice. For example, you can enter a department or a function to which this task belongs.
- The field **Status** shows the progress of the action at the moment. When you create an action the status is always "In planning". After you have saved the action you can choose from four states.

The actions are then displayed in the table view with the following icons:

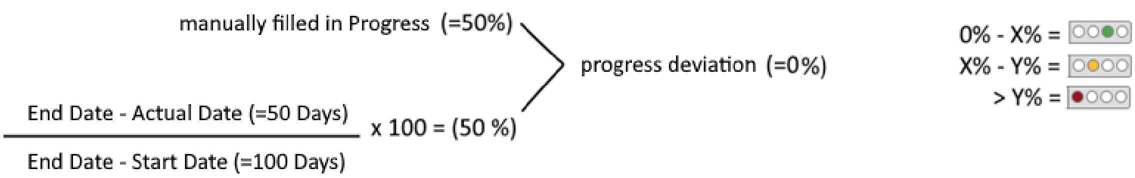
- In planning: This action has not been started yet.
- In process: This action is currently being processed.
- Completed: This action has already been completed.
- Checked for effectiveness: This action has already been check for its success and, if necessary, a new action can be triggered.

Note: As soon as an action has the status "Completed", you can no longer attach documents to it within the tabs.

- Enter the percentage value for the **progress** of the action. The traffic light has different tolerance levels (red, yellow and green). As soon as the progress is at 100% and the action has the status "Checked for effectiveness", the traffic light shows blue. If the end date is not defined in the action, the traffic light is greyed out.

Note: The traffic light can be deactivated or activated at any time in the settings. The respective tolerance levels can be defined in the settings.

Note: The traffic light represents a progress deviation. Here the planned target progress (start and end date) is compared with the actual progress (**progress** field in the action). This percentage deviation is now shown in the traffic light.



- In the following field, select the **Responsible** person for the action. Every employee created in WissIntra NG can be selected.
- After filling the Responsible field, the **Substitute** field appears. Here you can enter up to five employees, now.
- The field **Initiator** is automatically filled by WissIntra NG, but can be changed.

- In the **linked Risks** field, you can see which risk is directly linked to your action. The link will take you to that risk.
- Select the **Action Programme**, in which the action should be implemented. To do this, navigate in the drop down by clicking on ›. If the user possesses access rights to other locations, the action can also be assigned to an action programme of another location.
- Use the field **Found at** to specify the date on which the action was determined.
- With the **Start date** you can fix a date on which the action should start, with the **End date** when the action should be completed.
- In the fields **Planned Costs** and **Planned savings** you can enter the expected amount to show the costs of the action.
- The field **Finding** allows you to enter the information which made the action necessary. Thus, non-conformities to the actual process should be mentioned here.
- You can write down any other helpful comments about the action in the field **Remark**.
- As soon as the action has be created and saved, you can attach useful **Documents** to the action.

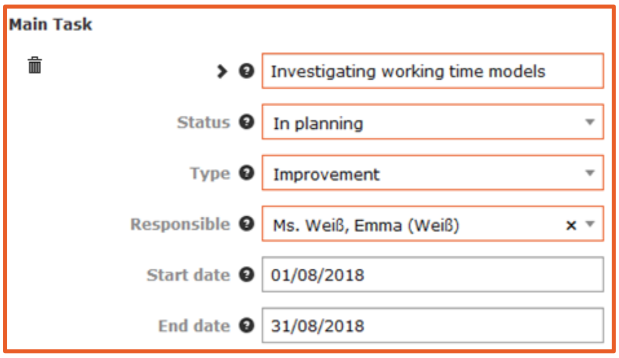
5.1.2 Cause

The second tab allows you to determine the cause of the detected deviation or error.

- Enter the reasons which led to creating the action in the field **Cause**. These can, for example, be internal or external influences or non-compliance with processes.
- In the field **Areas**, you can insert keywords that describe the areas in which the causes occur.
- You can also give other helpful information about the cause in the field **Remark**.
- After saving again, **Documents** can also be attached there.

5.1.3 Tasks

In the tab **Tasks** you can further subdivide an action. WissIntra NG enables you to divide an action into a main task and subordinate tasks. This ensures good clarity when solving complex problems. It also helps when several persons participate in this action or when the action is divided into numerous activities.



- Start by creating a main task by choosing meaningful title.
- The field **Status** shows the progress of the main task. After saving for the first time, the status can be changed.

The following option are available:

- In planning: This task has not been started yet.
- In progress: This task is currently being processed.
- Completed: This task has already been completed.

- In the field **Type** you can specify why this task should be executed.

The following options are available:

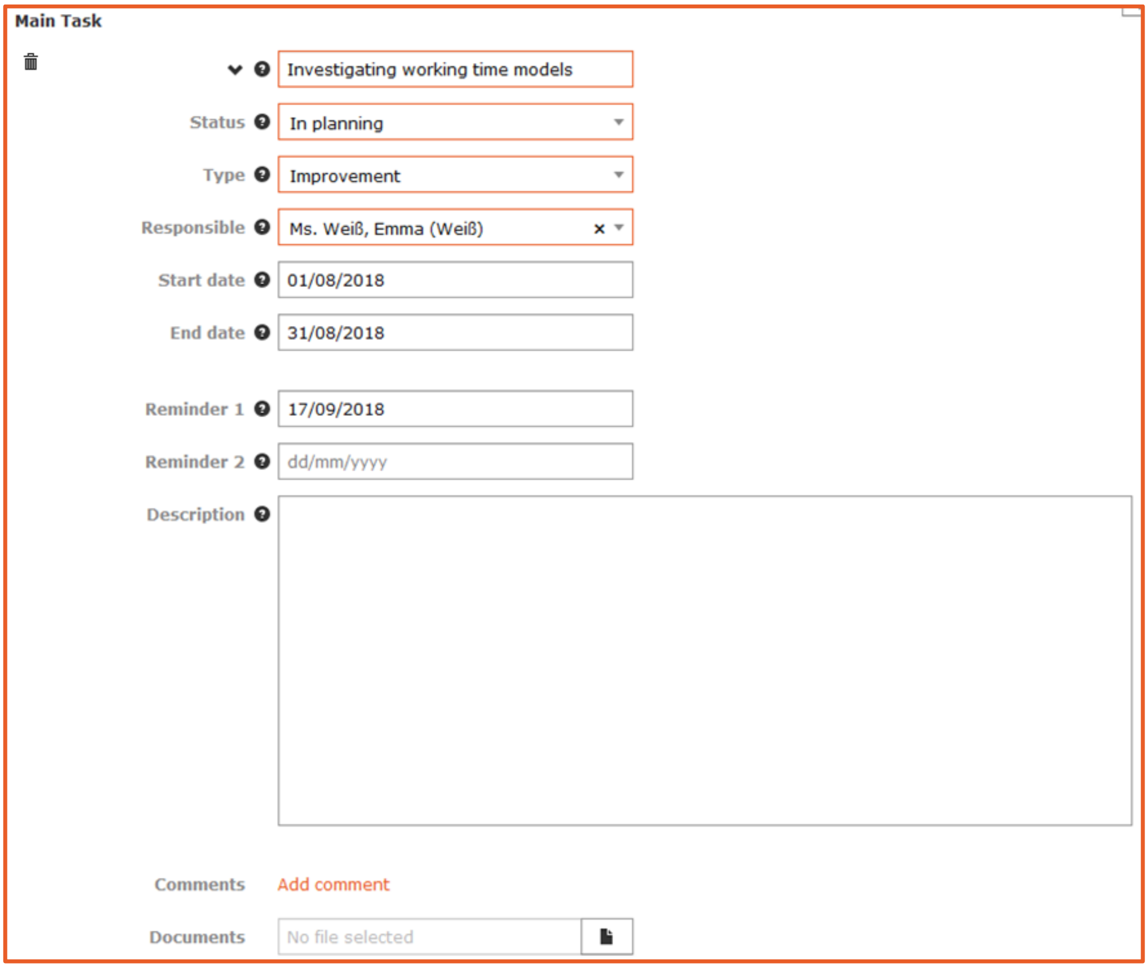
- Correction
- Fault prevention
- Improvement
- Immediate
- Prevention
- Urgent

The terms used here originate from quality management and enable you to work in accordance with quality standards, also with regard to possible subsequent audits. To adapt the task types to your company's requirements, you can change the names in the administrator settings. However, the number of task types cannot be changed.

Note: Keep in mind that any changes to the user interface should be documented.

- In the field **Responsible** you assign a WissIntra NG user to the task.
- With the **Start** and **End date** you fix a date on the task should begin and on which the task should be completed.

By clicking on you can expand the view of the tasks and you can fill in additional fields as follows:

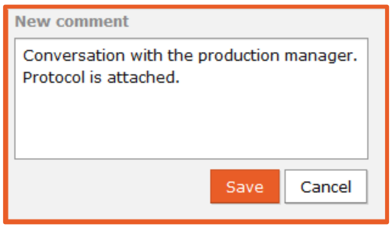


- You can enter a date in the field **Reminder**.

This will send a reminder e-mail to the person(s) defined in the **Notification at Achieved Reminder Date** within the notification settings for tasks. This can be, for example, the initiator of the task, the person responsible for the task, a user or an external contact person.

- In the field **Description**, tasks can be explained in more detail. Here you can describe structures, regulations, processes or records. This can be used to support the preparation of audits.

In the section **Comments**, a user who works on the task can add comments after saving for the first time. This is also possible if the user does not actually have permission for the Action Manager, but is assigned to an action or task.



- A click on **Add comment** opens a submodal in which the previous comments are listed and further comments can be entered.
- Finally, **Documents** can be attached if required.

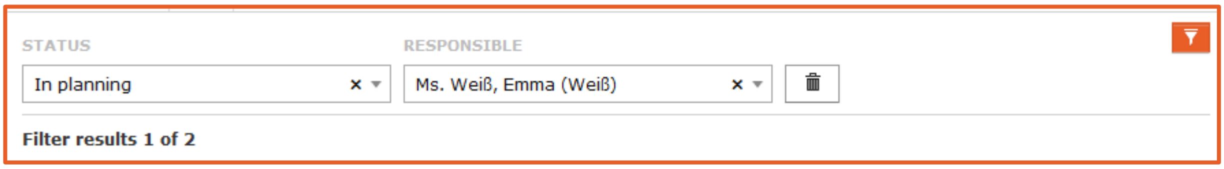
It may be useful to create further subordinate tasks in addition to the main task. The first task can be filled directly. To be able to create additional tasks, you first have to save the action.

> Note: If an action or task is assigned to a user, it appears in the cockpit under **My Actions** or **My Tasks**.

Filter tasks

Within the tab **Tasks**, you can filter the list of tasks by clicking on in the top right corner.

You can filter for the status of the tasks and the responsible person.



- To remove single filter values, click on the “x” next to the value. To remove the entire filter, click on .

5.1.4 Effectiveness

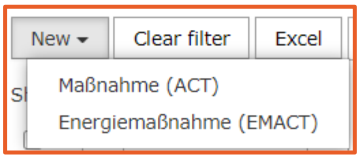
The last tab you can fill here is the tab **Effectiveness**. The following information is taken from the previous tabs: **Initiator**, **Finding**, **Main Task**, **Planned costs** and **Planned savings**.

Additional fields are available to document the effectiveness of the action.

- Select the employee that checks the action in the field **Verifier**.
- You can also enter a **Verification date** when the check for effectiveness should be done.
- In the fields **Actual costs** and **Actual savings** you can insert the amounts that have occurred.
- In the field **Remark**, you have the possibility to add notes. For example, recommendations or tips can be stored here.
- It is also possible to attach **Documents** after saving.

> Note: From quality management point of view, the check for effectiveness of actions is a quality-relevant characteristic for certification audits.

5.2 Energy action (licenced extension)



Depending on your licence, you can choose between two types of actions in the WissIntra NG Action Manager:

- Action
- Energy Action

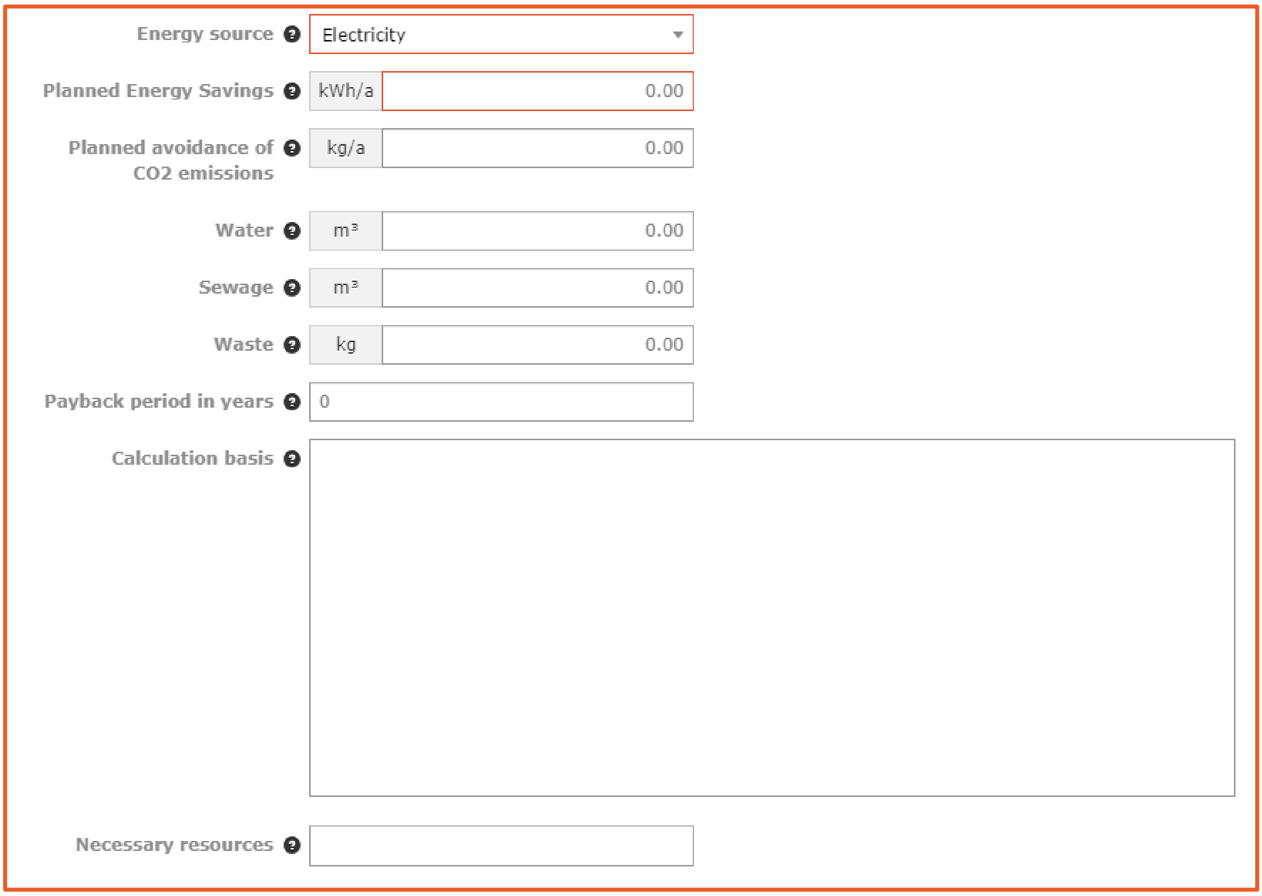
The Energy action supports you in planning and documenting energy management actions in your company.

Note: The energy actions are a paid extension of the WissIntra NG Action Manager. You can only create energy actions if you have the necessary licence.

- Click **New** and choose **Energy Action (EMACT)**.

The familiar modal for creating a new action opens. However, additional fields are visible in the two tabs **Finding** and **Effectiveness**.

5.2.1 Finding Energy Action



- Select the **Energy Source** to be considered within this action.
- Specify in **Planned Energy Savings** how much kWh/a you want to save by this action.
- In addition you can determine how many kg CO2 you want to avoid through the action during the year in the field **Planned avoidance of CO2**.
- You can also determine the **Payback period in years** and the **Calculation basis** for this energy action.

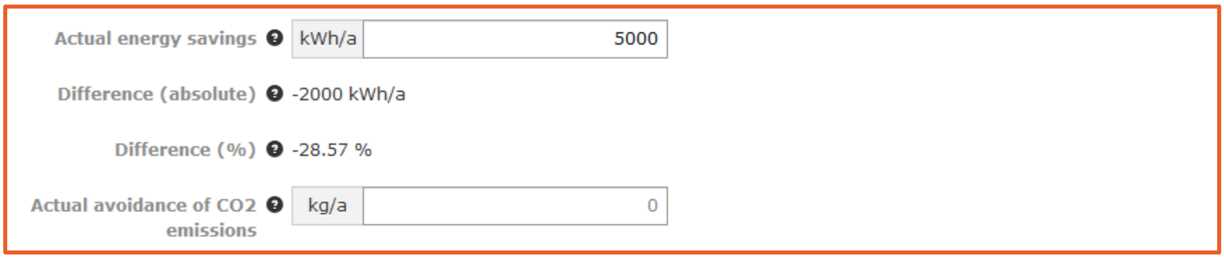
- In the fields **Water**, **Sewage** and **Waste**, you can document your planned consumption
- Finally, in the field **Necessary resources**, you can specify what you need to implement this action.

5.2.2 Effectiveness of the energy action

In the tab Effectiveness, the additional fields **Energy Source**, **Payback period in years**, **Necessary resources**, **Planned Energy Savings**, **Planned avoidance of CO2 emissions** and **Calculation basis** are shown from the tab Finding.

When checking for effectiveness, you can fill the fields **Actual energy savings** and **Actual avoidance of CO2 emissions** with the values actually achieved.

When you click on Save, WissIntra NG calculates the **Difference (absolute)** and **Difference (%)** between the energy savings and the actual energy savings.



5.3 Edit an action

- To edit an action, first open the action by clicking on the action title in the action list.

A modal appears in which you can see the contents of the action.

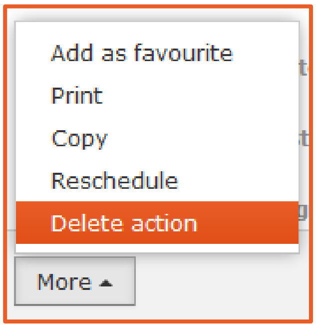
- Click on **Edit** to get to the edit mode, where you can do the desired changes directly.

5.4 Delete an action

In WissIntra NG, an action can be deleted in two different ways.

- Open the action programme, where the action which you want to delete is stored.
- Select the checkbox in front of the action that you want to delete.
- Click on Delete that appears on top of the list and confirm the security prompt.

- Alternatively, you can open the action, click on More ▴ and select **Delete action**.
- Confirm the security prompt to delete the action.



Recycle bin for actions

It is possible to activate the **Recycle bin** for actions in the settings area.

This means that deleted actions are not immediately deleted from the system, but moved to the virtual folder **Recycle bin**, which administrators can see directly in the Action Manager.

It can be defined how long the actions should remain in the recycle bin before they are permanently removed from the system.

The administrator can also restore actions from the Recycle bin.

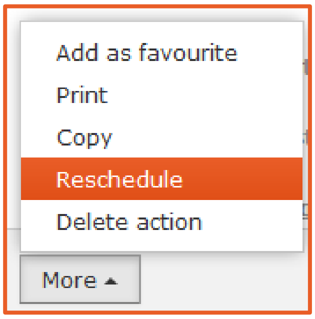
> **Note:** For more information about configuring the **Recycle bin**, please refer to the **Administrator Manual Configuration**.

5.5 Reschedule an action

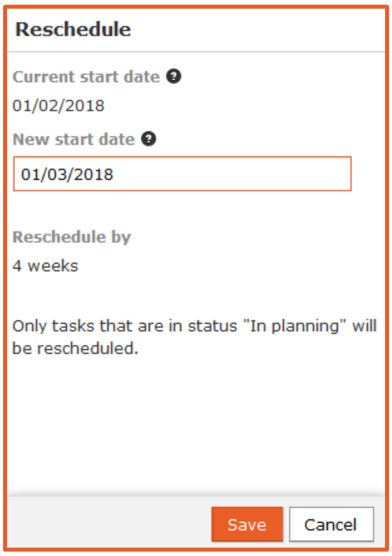
If an action contains a start date, the dates of this action can be moved. This applies also to all appointments except the **Found at** date.

> **Note:** You can only reschedule tasks that have the status **In planning**.

- Switch to edit mode, navigate to More and select **Reschedule**.



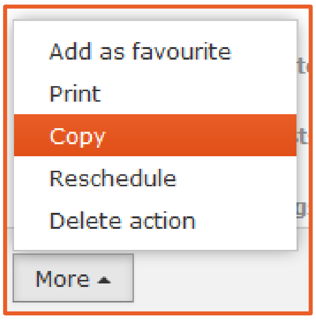
- The **Current start date** is displayed in the opening submodal and you can enter the desired **New start date**. Under **Reschedule by** WissIntra NG shows you the time difference between the two dates. Click on **Save** to confirm the reschedule.



5.6 Copy an action

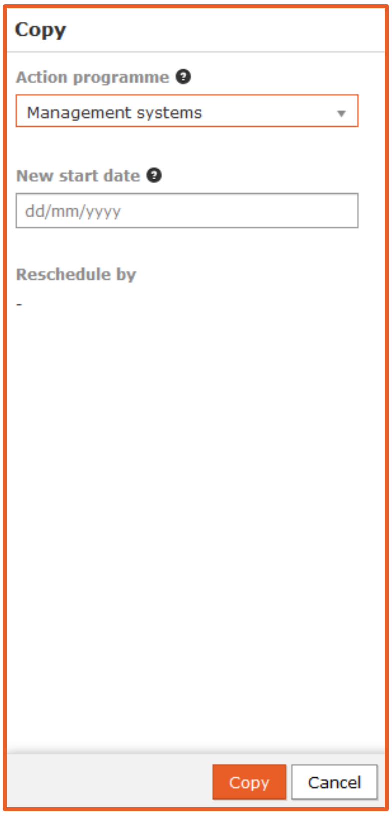
WissIntra NG enables you to copy tasks so that you do not have to create each task individually.

- Open the action which you want to copy, click on More and select **Copy**.



This opens a submodal.

- Select an **Action programme** to which you want to copy the action. The default setting is the action programme in which you are currently working.
- If you want the new action to start on a specific date, you can choose a **New start date**.
- If the action which will be copied has a start date, you see under **Reschedule by** the time difference between the two dates.
- Click on **Copy** to confirm the command.



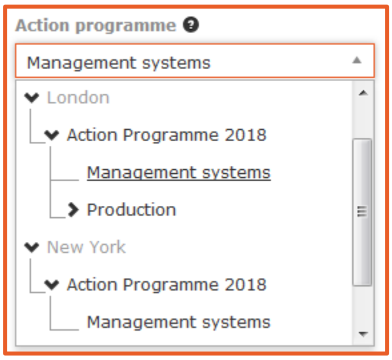
A modal opens with the copy of the selection action. This is indicated by the prefix “(Copy)” in the title.

The modal is opened in edit mode, so that you can make changes directly and rename the new action immediately.

Copy an action to another location

WissIntra NG offers you the option to copy an action to another location.

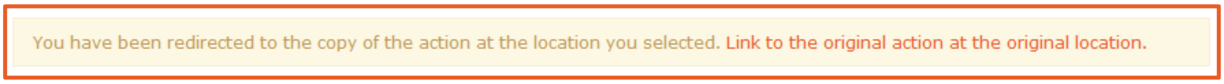
Note: Make sure that an appropriate action programme has been created at the required location.



- Open the action which should be copied and choose **Copy** via More .
- Click in the field Action programme, use to open the desired location and select the corresponding action programme.
- If necessary, select a new start date and click on **Copy**.

You will now be forwarded to the copy of the action at the new location where you can edit it as usual.

As long as you keep this modal of the copy open in detail mode and do not close it, the link at the top of the modal will take you back to the original action at the original location.



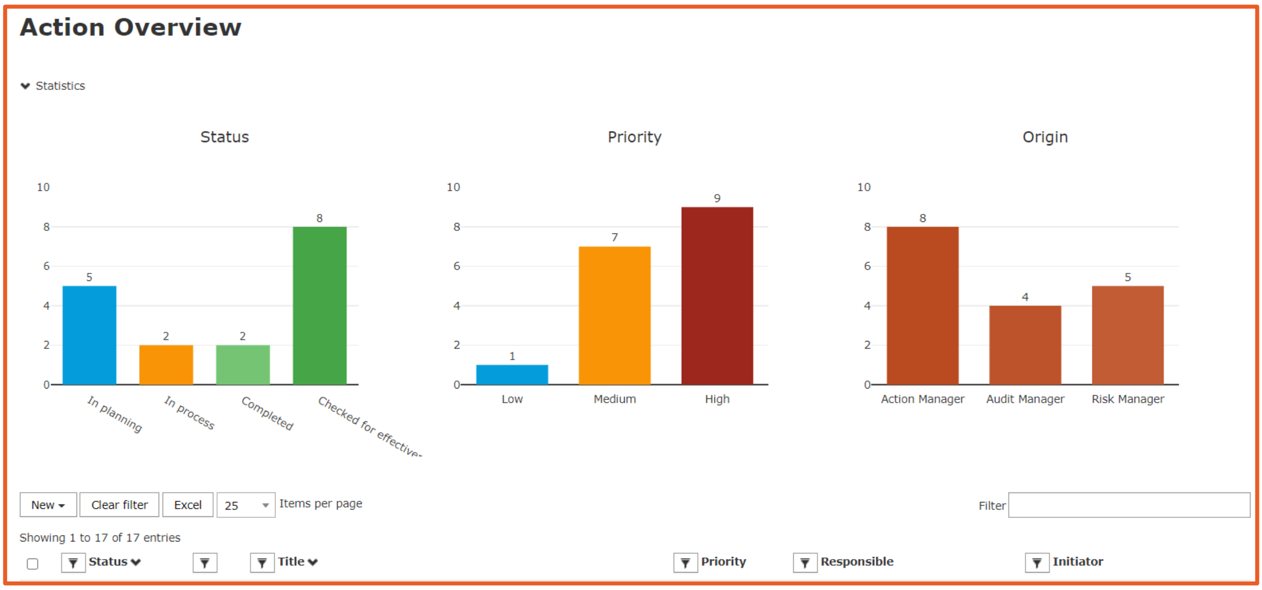
6 Reports

6.1 Statistics

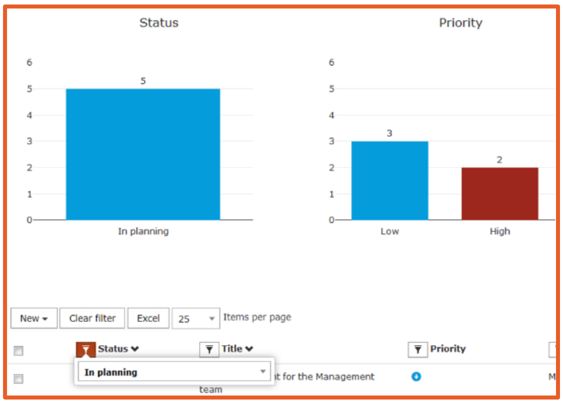
The Action Overview and in each Action programme you can get a graphical overview of the created actions.

- Click on **Statistics** below the headline.

The system displays three bar charts which provide information on the status, the priority and the origin of the actions.



As soon as you use the filter or search function in the list of actions, the diagrams are automatically adjusted according to the displayed results.



6.2 Reports

WissIntra NG enables you to generate evaluation of the tasks using reports.

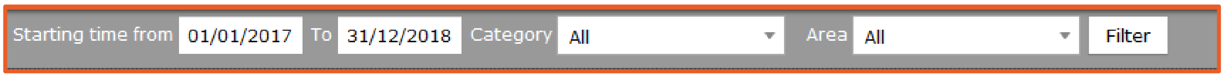
In the context of the continuous improvement process in quality management, organizational actions to improve process quality, performance, product quality etc. can be defined and implemented. The evaluation possibilities in WissIntra NG facilitate internal evaluation and provide important information for auditors, and thus supports certification.

In the Action Manager, two different types of reporting can be displayed. Each provides additional information with different filter options.

6.2.1 Action overview (current location)

- To obtain an overview of all actions, click on **Reports** in the grey bar and select **Action overview (current location)**.

In the action overview you can reduce the list of evaluated actions by setting filters.



Note: An action is only considered in this report if it has a start date.

The structure of the report corresponds to all other reports in WissIntra NG. The upper part of the report provides an overview of the most important data, such as the **Area** to which the actions have been assigned, the number of **Actions**, the **Starting time**, the **Category**, the number of **Tasks** and **Action programmes**.

Below this, the individual actions are arranged **By status**, **By priority**, **By action programme**, **Categories** and **Areas**.

This gives you a quick overview of the number of actions and the relationship between them.

Note: WissIntra NG offers you the possibility to embed your company logo in the header of your reports. The procedure for this is described in detail in the Administration Manual Configuration.

With the icons above the report, you can e.g. **Export the report as PDF**.

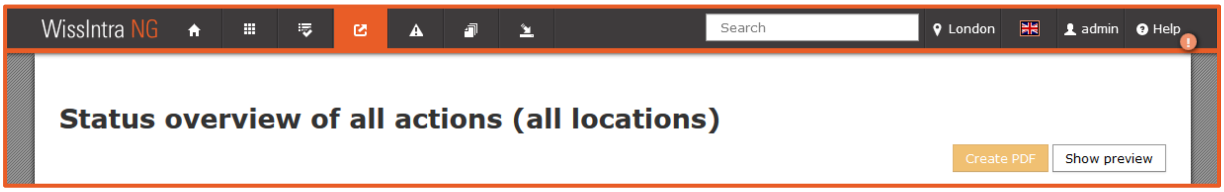
Note: Reports are always displayed in the selected interface and content language.

6.2.2 Status overview of all actions (all locations)

The **Status overview of all actions** shows the status and progress of all actions in all locations.

- In the Action Manager, click on Reportings and select **Status overview of all actions (all locations)**.

A new tab opens in which you can print the report a s a PDF file or preview the report.



- Click on **Create PDF** to create a printable PDF of the report in a new tab.

Note: For this function, you need a version of the Windows Server 2012 or later or Windows 10. If this is not the case, the button cannot be clicked.

- Click on **Show preview** to display the diagrams in the same window.

The different diagrams show the number of actions at all locations.

The coloured sectioning represents the traffic light status of the actions.

Active actions

All actions that have the status **In planning**, **In process**, **Completed** or **Checked for effectiveness** and are not archived.

Due status of actions

All active actions are displayed. The system divides whether the end date is in the future (**Due**) or in the past (**Overdue**).

Due actions

The active actions with an end date in the future, divided into different time periods that show in how many days the action is due.

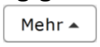
Overdue actions

The active actions with an end date in the past are also divided into periods that indicate how many days the action has been overdue.

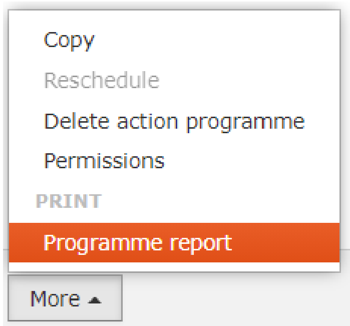
6.2.3 Programme report

Furthermore, it is also possible to create a programme report in WissIntra NG. This provides you with a detailed overview of the selected action programme.

To do this proceed as follows:

- Select the appropriate action programme in the sidebar and open it by clicking on the magnifying glass  .
- Click on 

 and select **Programme report**.



The programme report of the selected action programme opens in a new tab.

At the top you can also find the icons for exporting the report.

The upper part of the report contains an overview of the contents.

The **Programme manager** is listed, as well as the number of **Actions** and the **Time span**, in which the action programme is implemented. It also lists the **Parent node**, the number of contained **Tasks** and subordinated **Action programmes**.

The **Objectives** and the **Description** of the action programme are also shown.

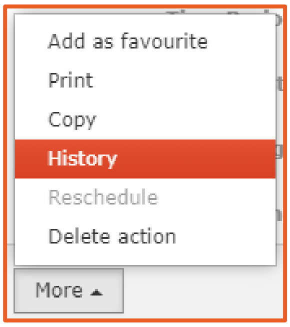
Below that, different diagrams show the actions sorted **By status**, **By priority**, **By action programme**, **Categories** and **Areas**.

Note: For a holistic use of the possibility of WissIntra NG, it is helpful to use the Action Manager in combination with the Audit Manager. In this way, you can achieve a valuable facilitation of the documentation for the quality management of your company.

7 History

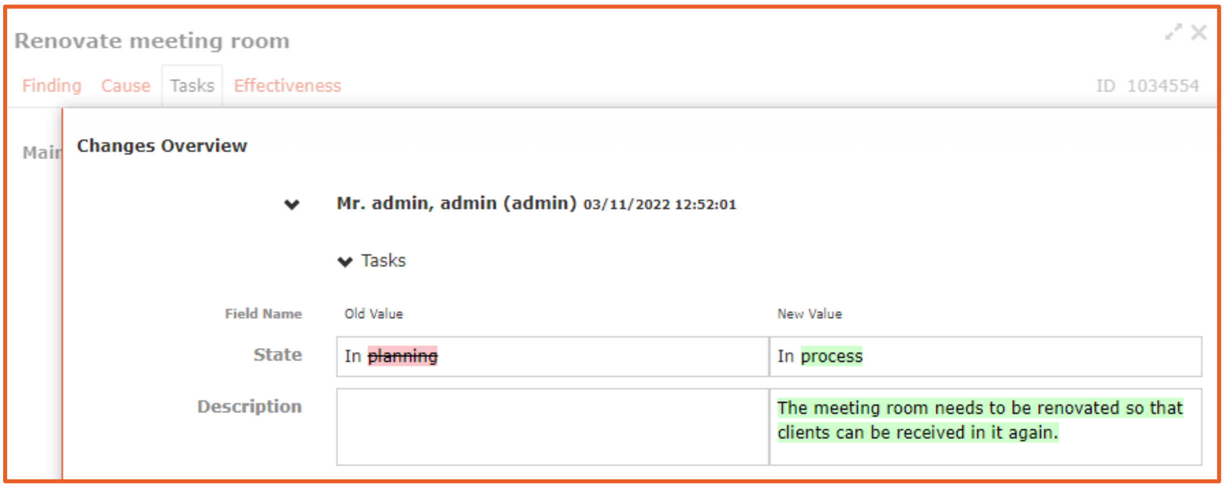
Due to legal requirements and especially regarding a successful quality management, storage of data with its completeness and chronological sequence is very important for companies.

- To access the history of an action, open the corresponding action.
- Click the button **More** at the bottom left and select **History**.



Now all changes to this action appear. You can use the icon to open individual changes.

In addition to the user and the date, the history also contains information about the changes made.



Note: The history starts with the day of implementation of this function. A retroactive history is not possible. The function is content of the November 2022 release.

8 Keyboard Shortcuts

General	
CTRL + SHIFT + UP	Navigates to the main navigation
CTRL + SHIFT + DOWN	Navigates to the breadcrumbs (mini-view of the process card)
CTRL + SHIFT + LEFT	Navigates to the first navigation sidebar entry
CTRL + SHIFT + RIGHT	Navigates to the main content (first process card or first table entry)

Modal	
CTRL + E	Opens Modal
CTRL + S	Saves the date in the modal
ESC	Closes the Edit / Detail modal
CTRL + ALT + 1	Opens the first tab
CTRL + ALT + 2	Opens the second tab
And so on.	

Depending on what has been activated, the navigation buttons have a different function:

Main navigation	
LEFT	Previous Module
RIGHT	Next Module
ENTER	Enters the module

Table	
UP	Cursor jumps back one line
DOWN	Cursor jumps to the next line
LEFT	Navigates to previous page
RIGHT	Navigates to next page
ENTER	Opens the modal
SPACE BAR	Opens the checkbox
ESC	Deactivates all checkboxes

Matrix/Function lane (matrix itself)	
UP	Navigates to the overlying process card
DOWN	Navigates to the underlying process card
LEFT	Navigates to the previous process card
RIGHT	Navigates to the next process card
ENTER	Opens the process card / navigates one level downwards
ESC	Undo the move

Matrix/Function lane (Breadcrumbs)	
LEFT	Navigates to the previous process card
RIGHT	Navigates to the next process card
ENTER	Opens the process card / navigates one level upwards

Treeview	
UP	Cursor jumps one element higher
DOWN	Cursor jumps one element lower
LEFT	Folds a branch
RIGHT	Unfolds a branch
ENTER	Opens or select the entry (modal opens)

9 FAQ – Frequently Asked Questions

In this chapter you will find answers to frequently asked question when working with WissIntra NG:

Why do some hyperlinks from MS Office documents not work correctly?

This problem may occur if the name of the page from which you want to create a hyperlink contains a hash character (#).

When you right-click a hyperlink in a Word document and use the Insert Hyperlink option, the hash sign is displayed incorrectly and the inserted link cannot be opened correctly.

Note: The hash sign (#) is a valid character when using file names, but is not accepted for hyperlinks in MS Office documents.

To avoid this problem, use on of the following methods:

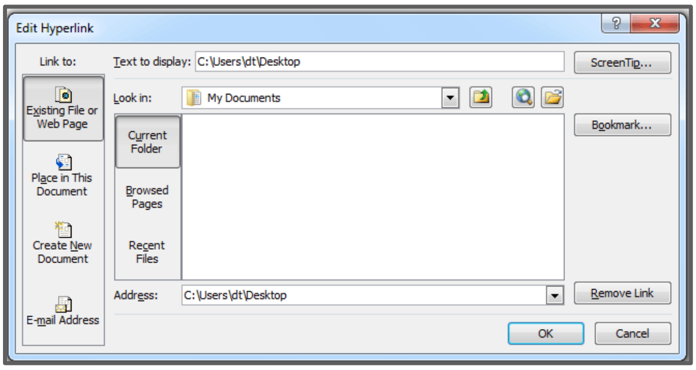
- Use CTRL + C to copy the address of the hyperlink and insert it into the Office document.
- Press **Enter** to automatically generate a link.

Or

- Right-click the corrupt link in the Office document.
- Click on **Edit Hyperlink**.

The following window will open:

- Insert the correct address of the hyperlink and click OK.



Note: For more information about this MS Office issue, visit Microsoft Support at: https://support.microsoft.com/de-de/kb/202261

The same problem can appear when creating a PDF with the integrated PDF tool in Office (PDF / XPS document). Again, the hyperlink may be displayed incorrectly and cannot be opened correctly.

To avoid this problem, we recommend using an alternative external tool for creating PDFs. For further questions about this issue, please contact Microsoft Support.

When opening a document, a login window appears. How can I avoid that?

If you are using a version of Microsoft Office 2010 or older and open WissIntra NG with the Internet Explorer, it may happen that a login window appears when you open Office documents in the Document Manager or within a modal, prompting you to log in with your Windows user data.

To solve this problem, please contact your administrator. **Chapter 4.3** in the **Administrator Manual Configuration** describes how to bypass this behaviour.

What is the difference between modules and modals?

The various software applications, such as the Process Manager or the Audit Manager are called modules.

The dialog windows are called modals where you can navigate in tabs and insert input.

10 Customer Support and Service Desk

Follow the instruction in this manual to make the best preparations for working with WissIntra NG. Should you still have any questions and you need support from our service team, please contact us under consideration of your service level.

We would be pleased to receive your feedback and suggestions.

We wish you a lot of success and pleasure working with WissIntra NG!

Customer Support

k+k information services GmbH
Höhenstraße 16
D - 70736 Fellbach
Tel: +49 711 578813-0
Fax: +49 711 578813 -77
https://www.kuk-is.de/wissintra.html

Service Desk

E-Mail: **Servicedesk@WissIntra.de**

Tel: +49 711 578813 -13

Monday to Friday from 9am – 12am and 1pm – 5pm (CET)

Note: Before you contact the Service Desk, please contact your internal WissIntra NG contact person to learn more about your service level and the resulting contract terms.

Note: Please let us know your current program version with each contact. You will find this on each WissIntra NG page at the lower right corner.

WissIntra Online Support via pcvisit:

With pcvisit, we switch directly to your screen.

This is how it works:

- Make an online support appointment.
- Download the guest module for pcvisit.
- Follow the step by step instructions.

For detailed instructions, please visit:

https://www.kuk-is.de/files/kuk-is/userfiles/Kundenzentrum/Support/kk_information_services_Anleitung_pc_visit.pdf

Our service staff will be available at any time to answer your questions.

.

k+k information services GmbH

Höhenstraße 16
D - 70736 Fellbach
Tel: +49 711 578813 -0
Fax: +49 711 578813 -77

E-Mail: Servicedesk@WissIntra.de

Internet: https://www.kuk-is.de/wissintra.html