WissIntra NG

Administrator Manual

Configuration

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

Administrator Manual Configuration WissIntra® NG

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

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

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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

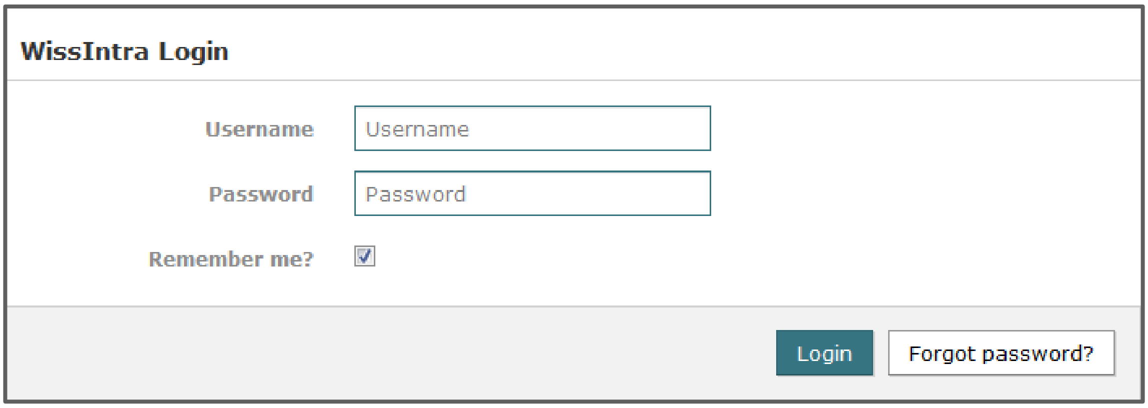
This chapter provides information about the following topics:

- 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**.

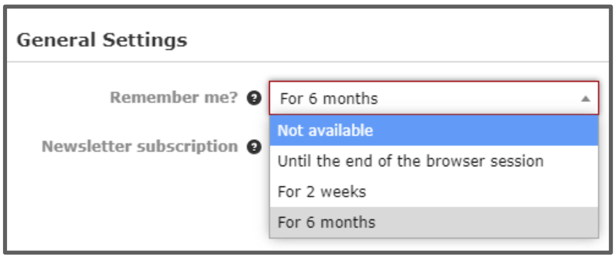
Note: If your user was created via the LDAP interface, please us your Windows password.

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.

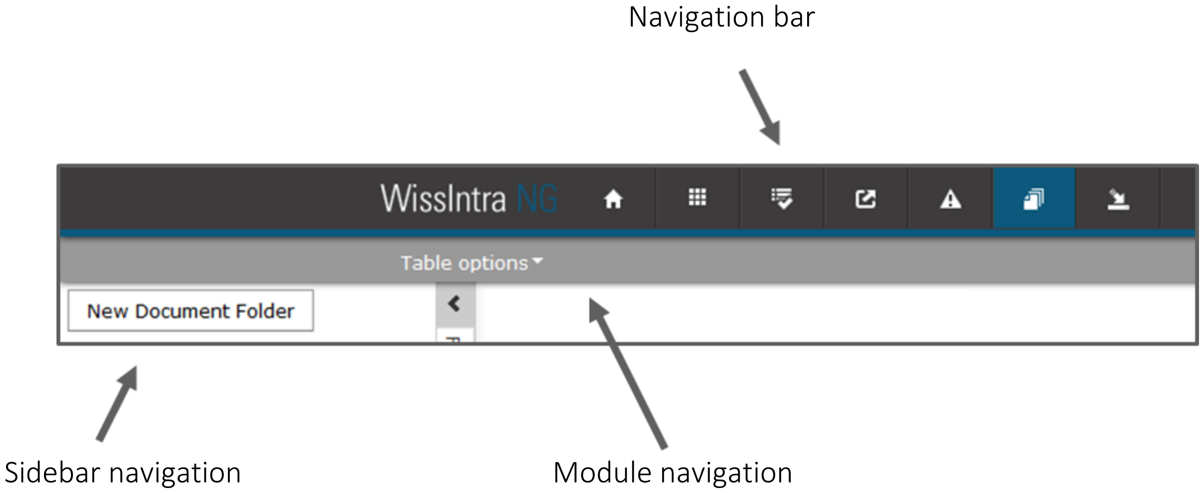
2.2 Operating concept

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.

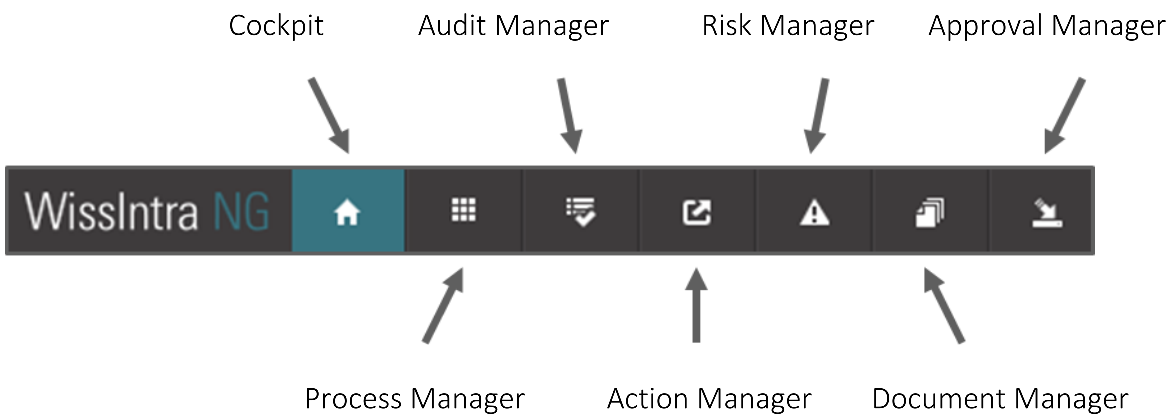


Modules

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.

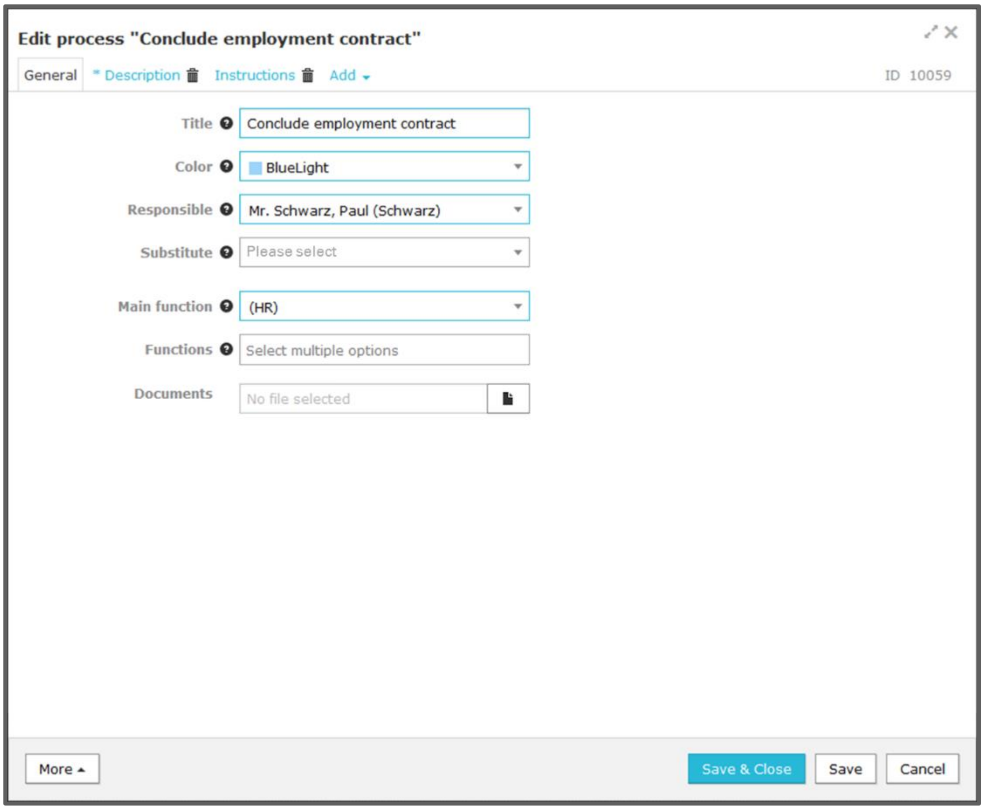
The graphic below shows the Cockpit, the Process Manager, the Audit Manager, the Action Manager, the Document Manager and the Approval Manager from left to right.



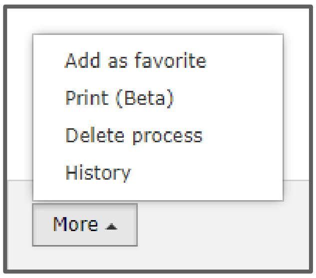
By clicking the respective symbol, the corresponding module opens. You can also click on the name of the module in the drop-down that appears on mouse-over.

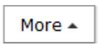
Modals

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.



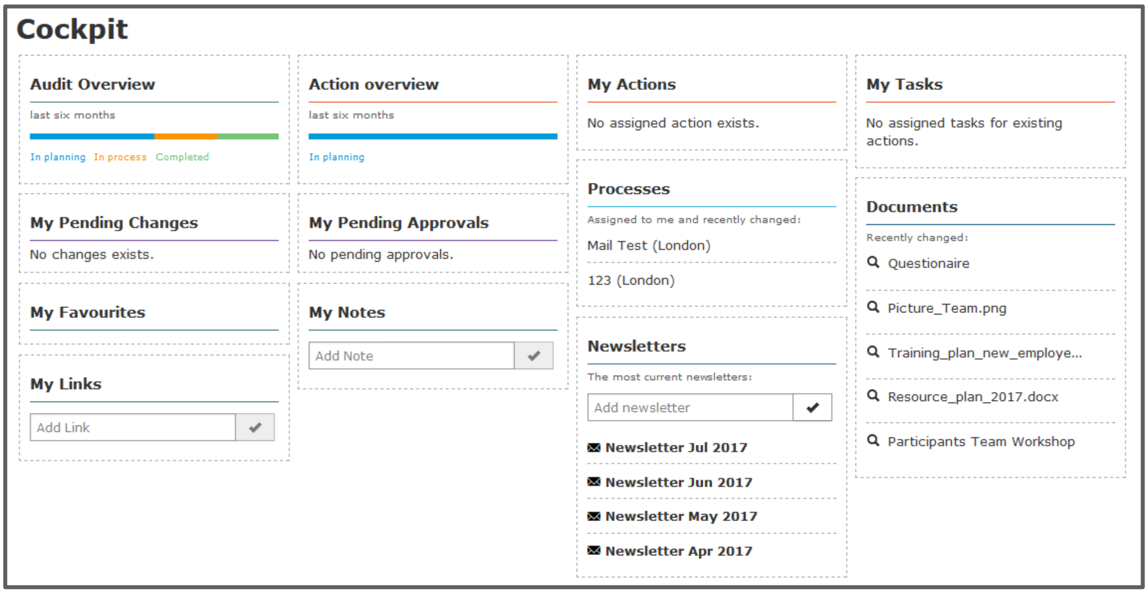
Most modals have the button 

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.
Suche	**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.

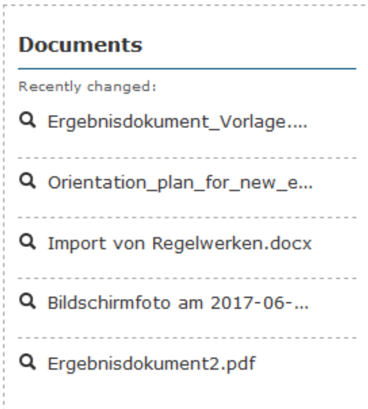
2.3.1 Cockpit boxes

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.

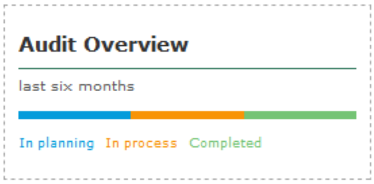
Documents

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)

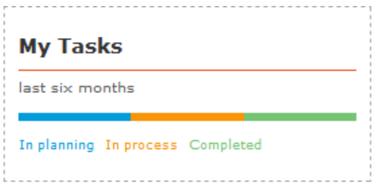
My Actions

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:

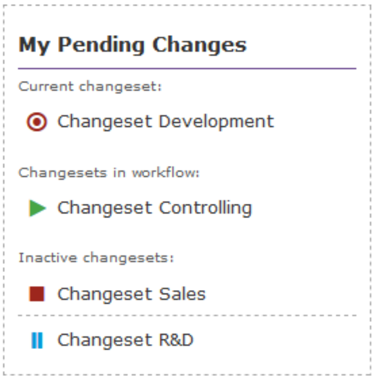


- In planning (blue)
- In process (orange)
- Completed (light green)

My Pending Changes

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

- Current changeset
- Changeset in workflow
- Inactive changeset



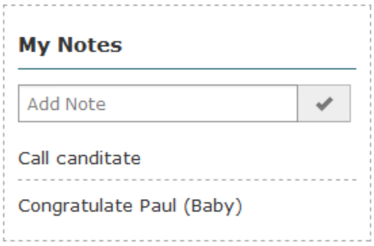
My Pending Approvals

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.



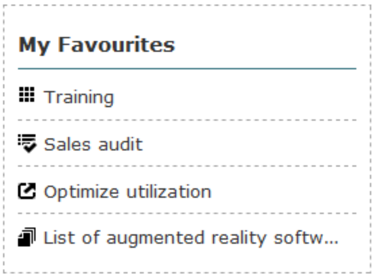
My Links

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.

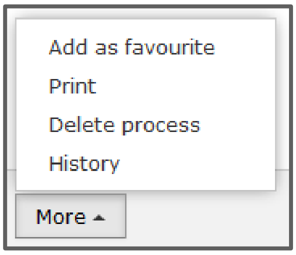
My Favourites

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



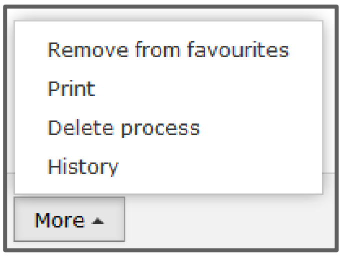
Add as favourite

- 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 .



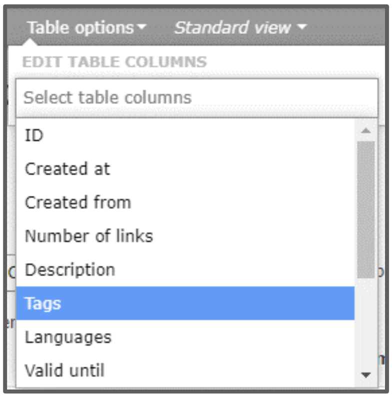
Newsletters

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 the columns of the tables.

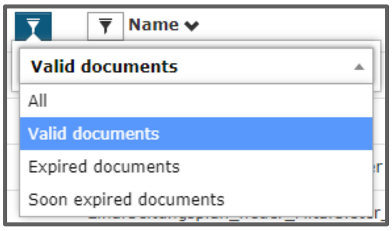


- In the module navigation (submenu), click on **Table options** and select the columns to be displayed.

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

Filter

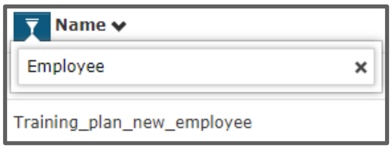
Each column in a table view can be filtered.



Columns with fixed values:

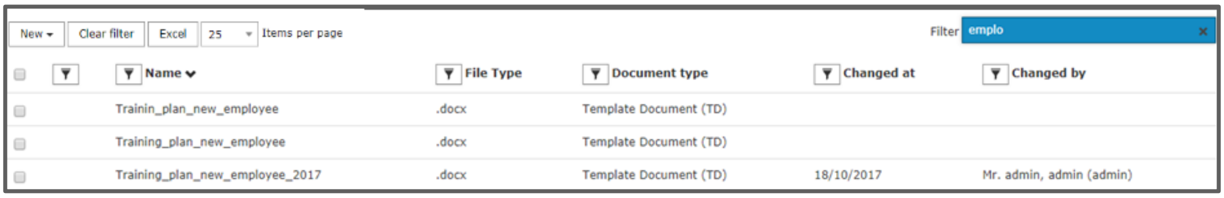
- Click on the filter icon and select a value from the drop-down list.
-

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.

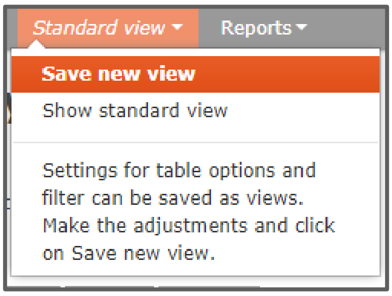
You can also filter across all columns using the general free text field on the right above the table.



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.

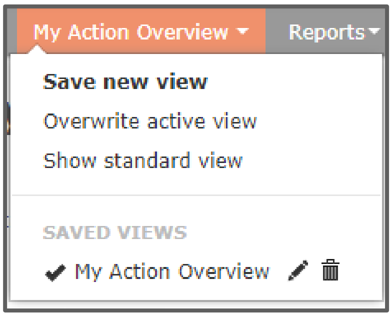
Save new view

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

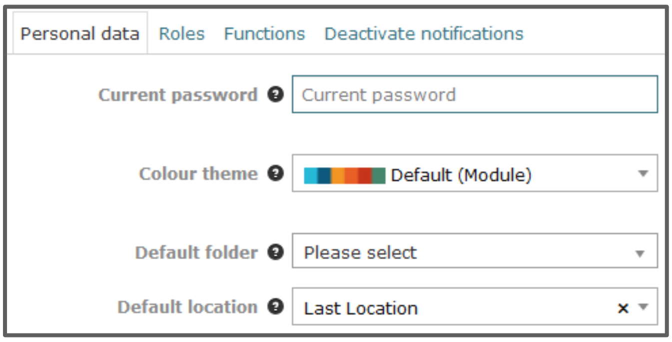
If you want to change a view that has already been saved, you can overwrite the view.

- 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**.

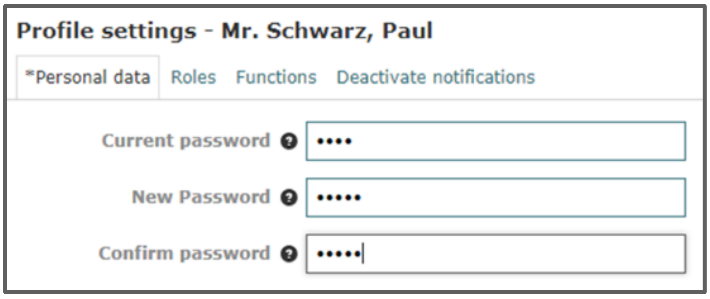
In the tabs **Roles** and **Functions**, the user can see which roles or functions are assigned to him within the respective locations.

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.

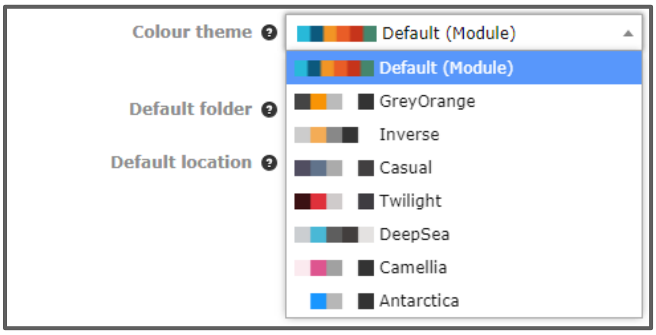


Note: This does not apply to LDAP users since they use the Windows password to login. This also does not apply to group users, since this password is always assigned by the administrator.

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.

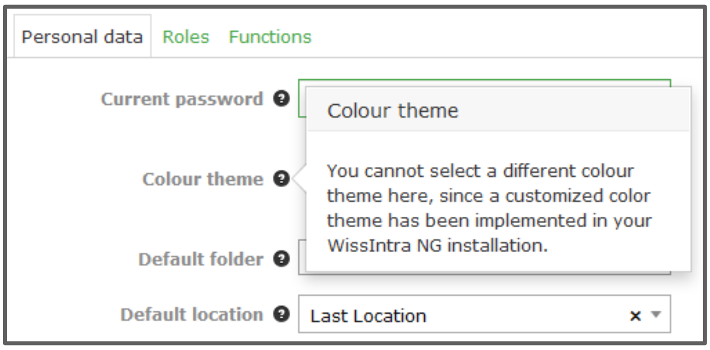


Note: The **Default (Module)** is selected from the beginning. Here each module has its own colour.

Customizing the WissIntra NG user interface

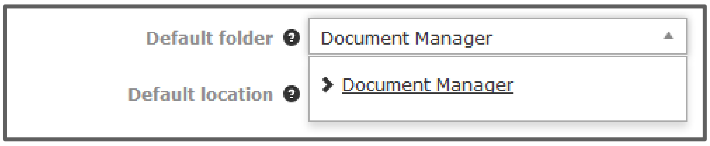
We offer you the possibility to customize the WissIntra NG user interface according to your wishes. You can find the information in the corresponding PDF in our Customer Centre.

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.



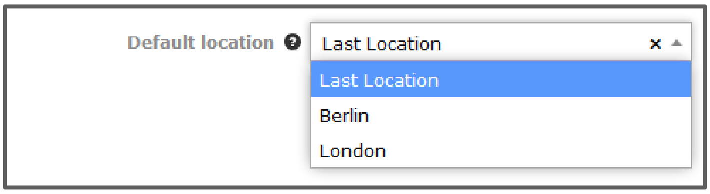
- Open the drop-down menu and navigate with › to the desired folder.
- **Save** your selection.

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

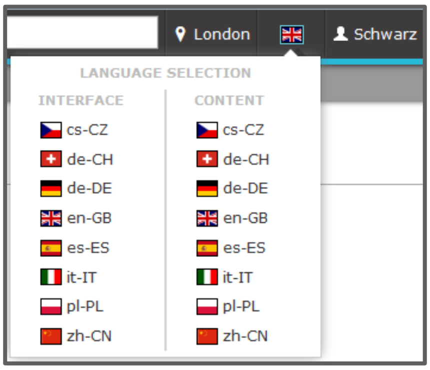


If you are able to access multiple locations in your system, you have the option to select a default location that will be opened each time you log in. Alternatively, you can choose that WissIntra NG always opens the location that was used at last.

- 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.

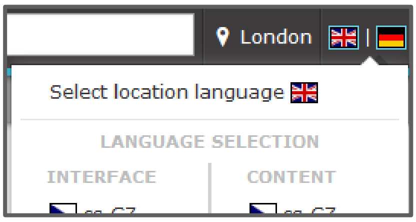
2.6 Language



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.



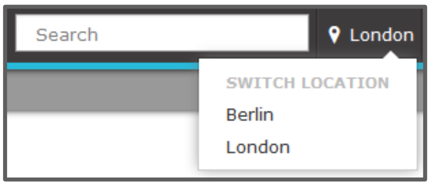
As soon as you have made such a selection, the option **Select location language** is displayed. This option changes both, interface and content to the language assigned to the specific location.

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.



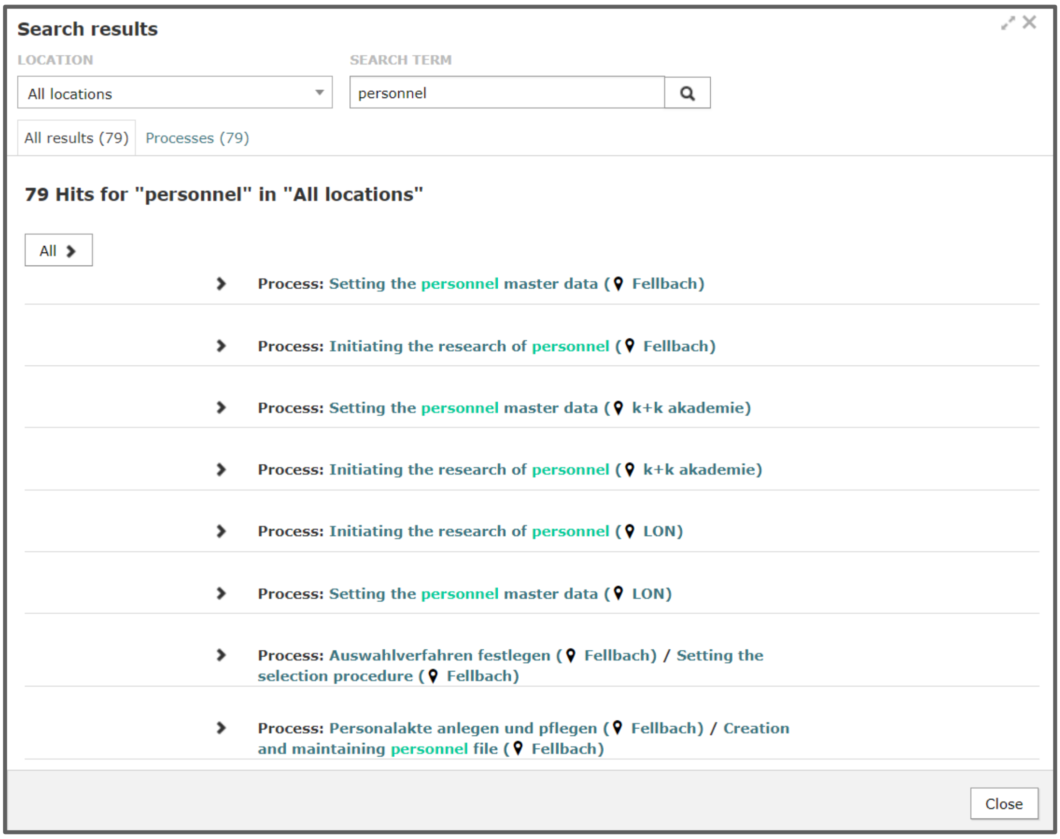
Note: Changing location is only available if you have several locations. This depends on your purchased licence. The administrator sets the parameters for the location.

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".



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.

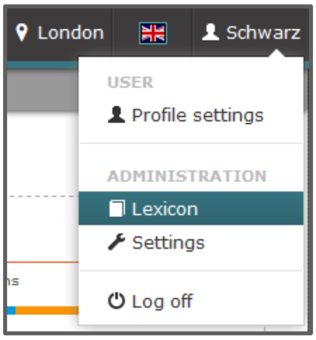
- For example, you search for “satisfied customer” and you want to increase the relevance of the term “satisfied”, you can boost it with the “^” symbol and a boost factor, e.g. “satisfied^4”. Thus, “satisfied” is 4 times more relevant for the search than “customer”. The boost factor has to be always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

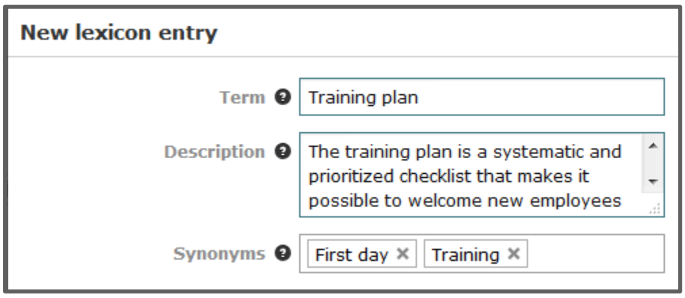
2.9 Lexicon



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.



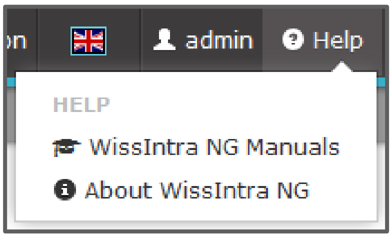
Alternatively, a lexicon entry can be made directly via each free text field:

- In the toolbar of free text fields, you can directly insert a term (but without synonyms) 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.

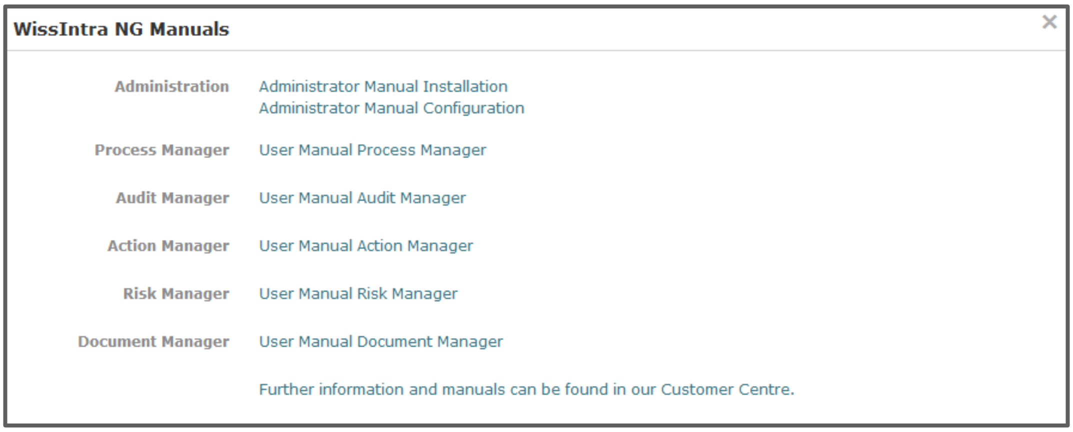


WissIntra NG Manuals

- 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.

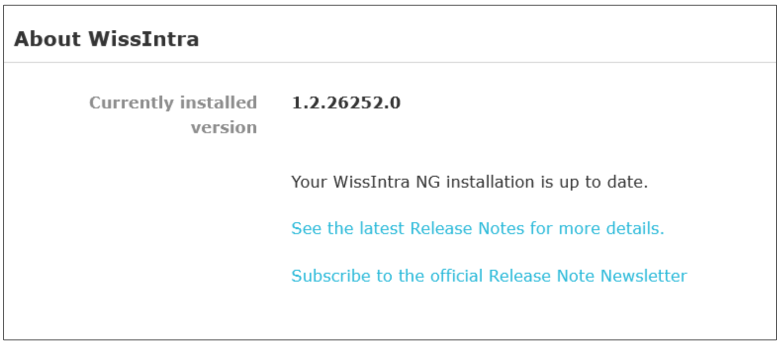


About WissIntra NG

- 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.

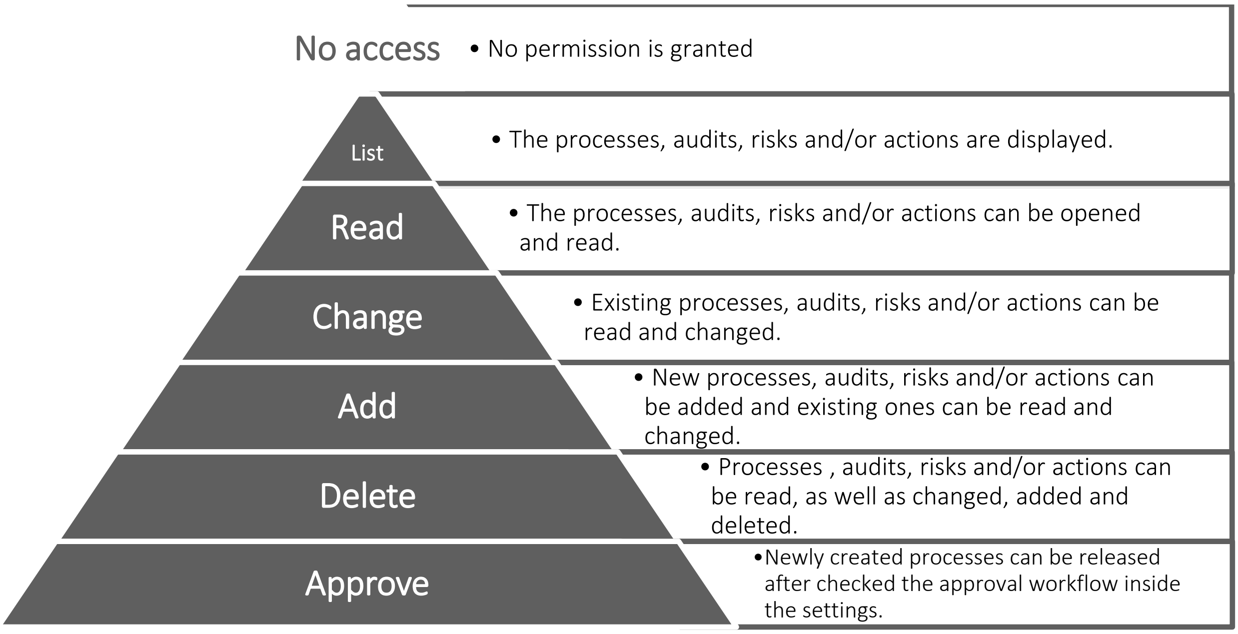
In addition, a link will take you directly to the current Release Notes. If your administrator activated the **Newsletter Subscription** option in **User Settings**, a link is shown that enables every user to subscribe to the official Release Notes Newsletter.



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

2.11 Permission concept

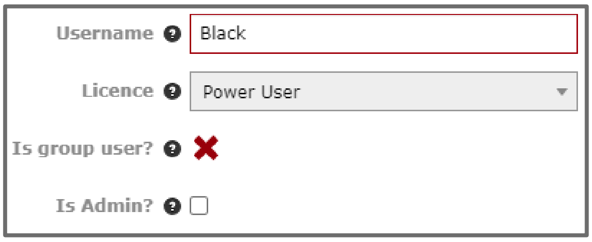
Access to WissIntra is given via permissions. There are six independent module permissions. The pyramid describes the increasing permissions from top to bottom:



> **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.

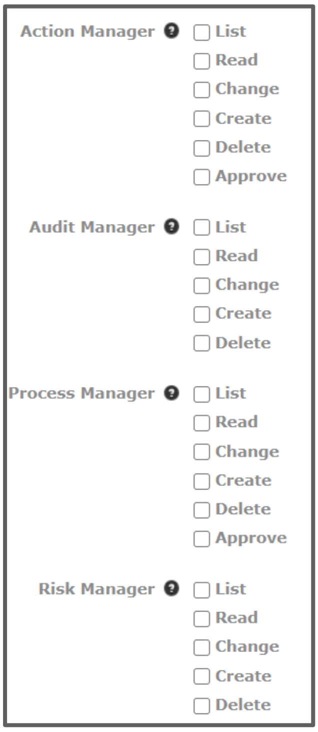
Therefore, you should develop an individual permission concept, which meets your company-specific requirements.

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 Administrator Settings

As an administrator, you have the option to make settings in WissIntra NG, which apply globally to the entire system.

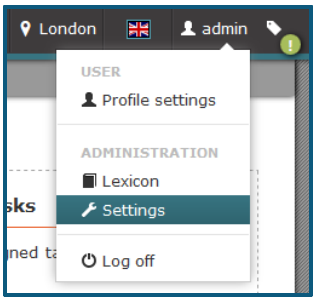
Note: Please consider the following when using IIS 7 and IIS 7.5:

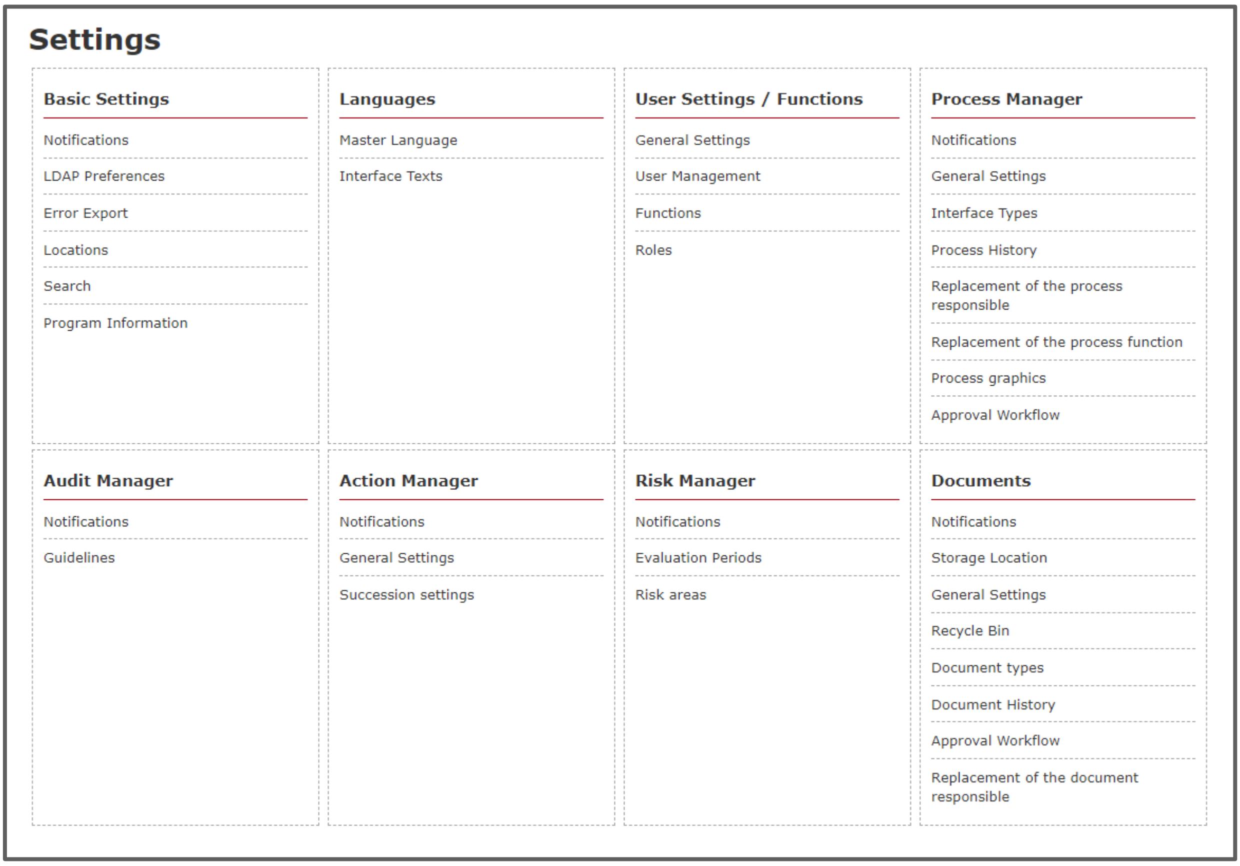
IIS 7: If you want to use IIS 7 as a web server for WissIntra NG, please consider that after re-starting the server the e-mail notifications are only sent after you first open WissIntra NG.

IIS 7.5: The default configuration for the web server is to switch into standby mode after a certain period of time. In the setup for WissIntra NG 1.1 this feature is disabled since the notifications need the ISS to run continuously. The web application is therefore opened simultaneously with the server start.

You can assess the administrator settings as follows:

- Navigate to **User**
- Select the section **Settings**
- The following window appears

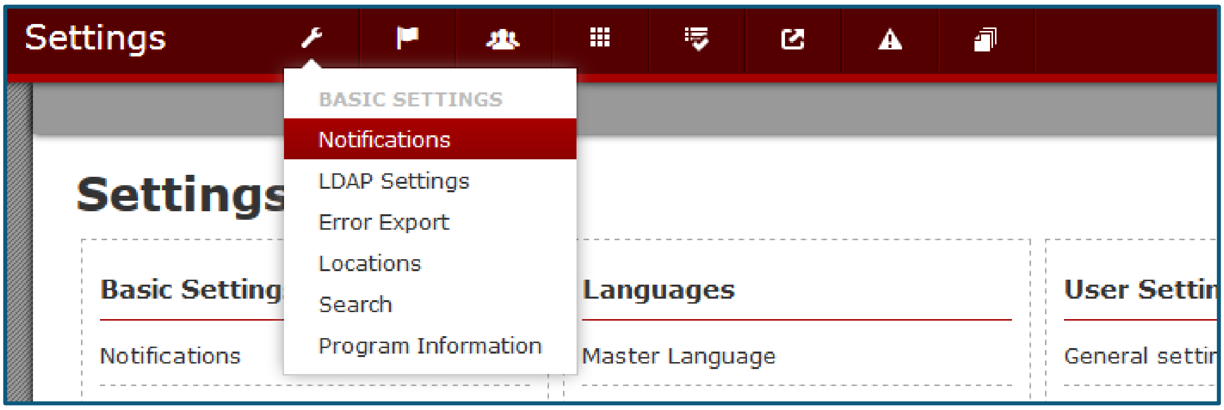




In the settings, eight boxes with several sections are shown. The number of boxes depends on your licence. Here you can access all general settings directly as well as the settings concerning the respective modules.

Note: These settings can only be made by an administrator. Users without administrator rights cannot access the settings.

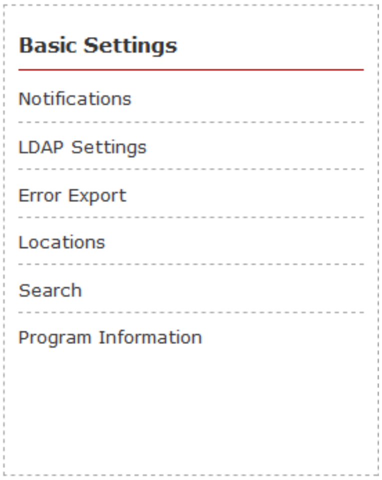
You find a navigation bar at the top of the page from which you can access the settings directly.



3.1 Basic Settings

In the Basic Settings you have the possibility to make general settings for WissIntra NG, which affect the entire software. The following settings can be made:

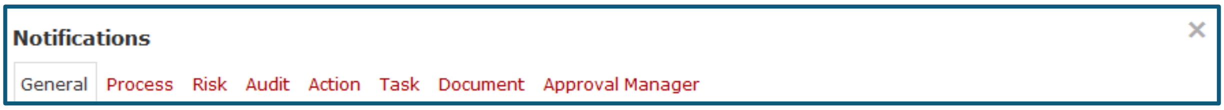
- Notifications
- LDAP Settings
- Error Export
- Locations
- Search
- Program Information



3.1.1 Notifications

WissIntra NG allows you to send notifications to employees or external users via e-mail. The necessary configurations are described here:

- Click on the section **Notifications**
- A modal with several tabs opens. Here you have the possibility to make general settings and settings for the respective modules.



The following settings are available in the **General** tab:

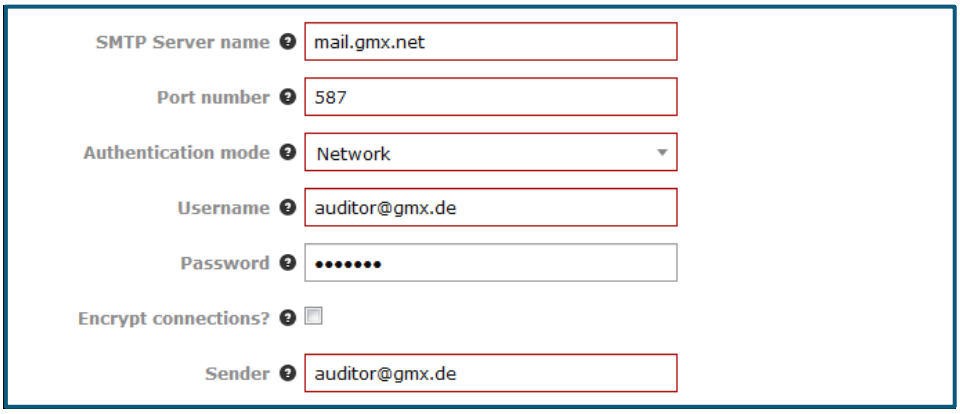
E-Mail Settings

The SMTP server is responsible for sending e-mails. Fill in the following fields:

- Enter the **SMTP Server name** of your SMTP server.

Note: To find the necessary information, open the Windows Start menu and type „CMD“ in the input field. The DOS window appears. If you enter “ping smtp.mysite.com” or “ping mail.mysite.com” you will get the name of your server.

If you do not want to use an internal mail server in your company but host your mails at an external provider, the following graphic shows exemplarily how the settings can be made:



First, decide whether you want the e-mails to be encrypted or unencrypted. Correspondingly, a different port number must be entered.

- Unencrypted (SMTP): 25 or 587
- Encrypted (SMTPS): 465

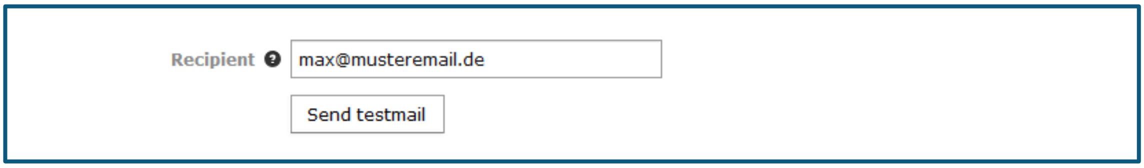
- Enter the corresponding **Port number**.
- Select one of the two types of **Authentication modes** from the drop-down menu:
  - None (No authentication, thereby it is possible to send e-mails internally without the appropriate permissions)
  - Network (The authentication is done over the network, so you need both a username and a password)
- Enter the **Username**, with which WissIntra NG logs on to your SMTP server.
- Enter your SMTP **Password**.

Note: The **Username** and the **Password** of a user must correspond to each other. The user has to have the permission to send e-mails with the **Sender**'s address.

- WissIntra NG also offers encrypted connections. Select the checkbox **Encrypt connections?** if your SMTP server requires this.
- Enter an e-mail address in the field **Sender**, from which the notifications are sent.
- WissIntra NG allows you to send **HTML e-mails**. To do this, select the checkbox. Otherwise e-mails will be sent in text format.
- In the next field you have to enter the **External server address** of your WissIntra NG installation. This must be accessible to all WissIntra NG users, as it is used for the links within the notification e-mails and reports. Usually this is http://Servername/WissIntraNG.
- Enter the **Internal server address** of your WissIntra NG installation. WissIntra NG uses this address to access WissIntra NG for sending e-mails. Usually this is http://localhost/WissIntraNG.

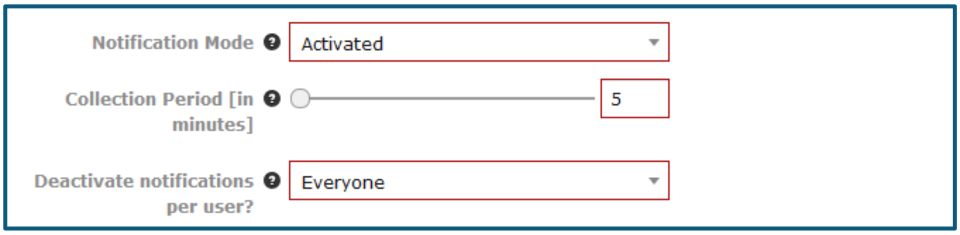
Testmail

In the section **Testmail** it is possible to test your input. In order to be able to send this testmail in WissIntra NG, you must enter a valid e-mail address as a **Recipient**.



Mail Mode

WissIntra NG offers you 3 different modes for sending your e-mails. You have to select one of the **Notification modes**.



- **Deactivated**: If you select this option, no further e-mails will be sent to users in the system apart from the password e-mail and the welcome message.
- **Activated**: In this case, the sending of notifications is active, i.e. notification e-mails are sent to the appropriate recipients.
- **Redirected**: This option will only send the password e-mail and the welcome message to the WissIntra users, all other notifications will be redirected to the recipient. This variant is suitable to be used as a test scenario in order to check if and where notification e-mails would have been sent without redirection.

The slider for **Collection Period [in minutes]** allows you to control when WissIntra NG sends the collected e-mails to the respective recipients.

Example: The quality management officer of your company wants to adapt his processes and is now making several changes that have taken place since the last revision:

- Exchange of 2 responsibles in 5 processes
- Adjustment (change and delete) of 4 actions to new legislation
- Creation of several tasks

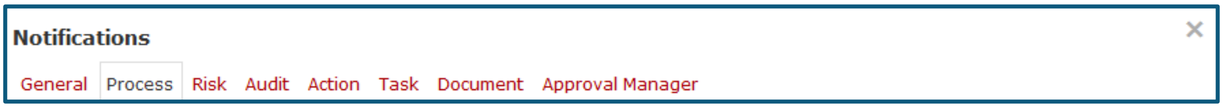
The phone rings and the employee answers the incoming call. In order not to lose the current entries, he saves his changes. After returning to his tasks, he discovers a spelling error in his last action, which he corrects immediately.

Because the administrator had previously set the collection period to be 30 minutes, the employee now only gets one e-mail that lists all the changes, instead of 14 e-mails for each change.

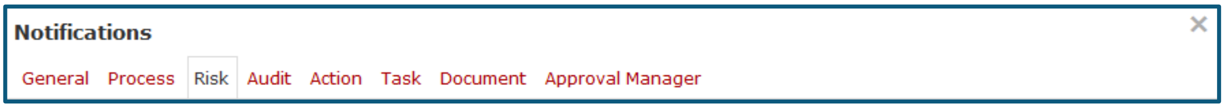
The field **Deactivate notifications per user?** allows you to specify who can deactivate the WissIntra NG notifications for the individual users per module. There are three possible scenarios:

- **Not available**: In this case, the notifications per user cannot be deactivated.
- **Administrator only**: Only the administrator can disable notifications for individual users.
- **Everyone**: With this selection each WissIntra NG user can deactivate the notifications individually according to his needs.

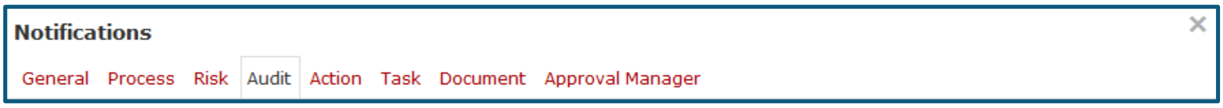
Note: Please note that the following tabs of the modules are visible according to the licence you have purchased.



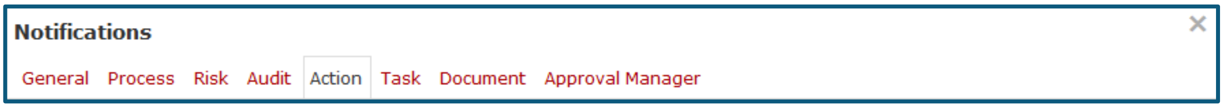
- Notification at Creation
- Notification on Changes
- Notification on Deletions
- Notification at Change of an Attached Document



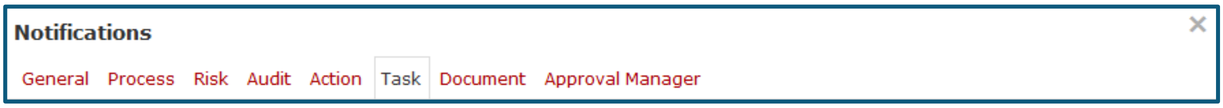
- Notification at Change of an Attached Document



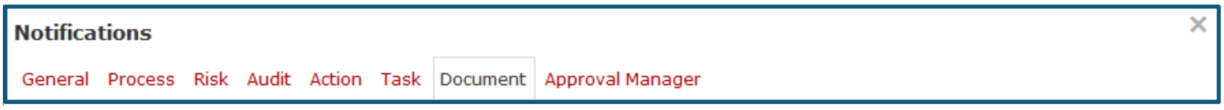
- Notification at Creation
- Notification on Changes
- Notification on Deletions
- Notification prior to start
- Notification of Status Change
- Notification at Change of an Attached Document



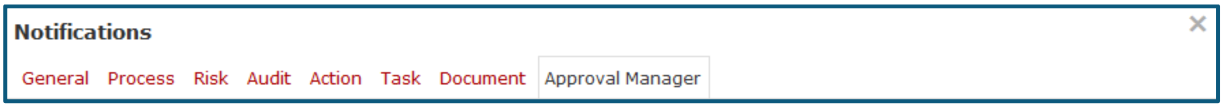
- Notification at Creation
- Notification on Changes
- Notification on Deletions
- Notification prior to Expiration
- Notification of Status Change
- Notification at Expiration
- Notification at Expiration Date Change
- Notification at Efficiency Check
- Notification at Change of an Attached Document
- Notification after Expiration



- Notification at Creation
- Notification on Changes
- Notification on Deletions
- Notification at Completion
- Notification at Change of an Attached Document
- Notification at Achieved Reminder Date
- Notification at Expiration
- Notification at comment creation
- Notification after Expiration



- Notification at Creation
- Notification on Changes
- Notification on Deletions
- Notification prior to Expiration
- Notification at Expiration
- Notification after Expiration



- Notification at Required Approval Evaluation
- Notification at Denial of the Approval
- Notification at Cancellation of the Approval Workflow
- Notification at Completion of the Approval Workflow
- Notification at Skipping of the Approval Workflow

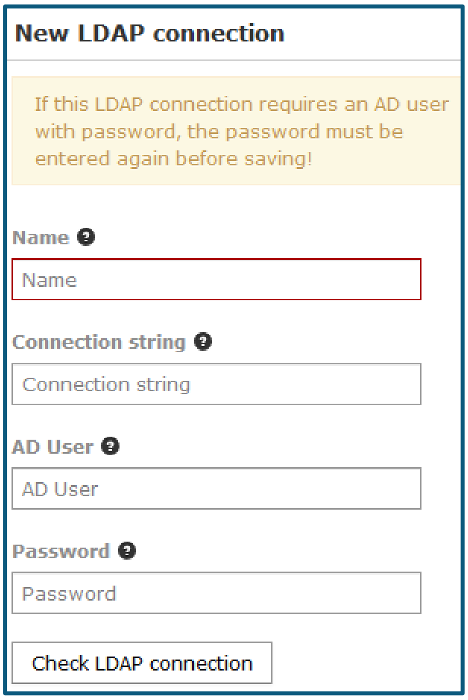
Note: If you activate the settings for scheduled notifications during operation of WissIntra NG, e-mails are sent for which associated action can be up to 2 weeks ago. Older actions are not considered.
This applies to the following notifications:
Audit: notification prior to start
Action: notification prior to expiration and at expiration
Task: notification at achieved reminder date and at expiration
Document: notification prior to expiration, at expiration and after expiration

3.1.2 LDAP Settings

In the **LDAP Settings** you can manage one or more LDAP connections.

In the opening modal, you can see the already created LDAP connections, if available.

Create a new LDAP connection

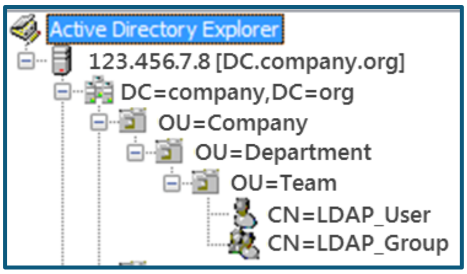


- Click on New LDAP connection .
- Enter a **Name** for the new LDAP connection.
- Enter the LDAP connection string to read the user data from the Active Directory via the LDAP interface in the field **Connection string**.
- Specify an **AD User** who is allowed to access the Active Directory via the LDAP interface with Read permission.
- Enter the **Password** for the previously specified AD user.
- With the button **Check LDAP connection** you can check if all entries are correct. This will be confirmed by a success message.
- **Save** the new LDAP connection.

LDAP connection to a subarea of the Active Directory

You have the option of specifying the connection string more precisely in the field **Connection String**, for example to get only the users that are in a particular Organizational Unit (OU) within the Active Directory.

LDAP://<Domain Name, Domain Controller Name or IP>/
ou=<Target OU>,ou=<OU above Target OU, etc.>,
dc=<Domain Component 1, etc.>



Example:

Domain Name: company.org
IP: 123.456.7.8
Path to the Target Organizational Unit:
Company/Department/Team

LDAP://123.456.7.8/ou=Team,ou=Department,ou=Company,dc=company,dc=org

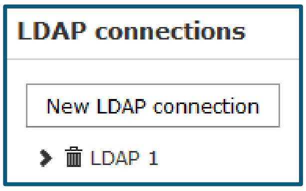
Edit an LDAP connection

- Click on the existing LDAP connection in the modal LDAP connections.
- A submodal opens in which you can make the desired changes.
- **Save** your changes.

Note: If the LDAP connection requires an AD user with password, you have to enter the password again for any changes before you click on **Save**.

Delete an LDAP connections

- Move your mouse over the name of the LDAP connections.
- Click on the appearing recycle bin .
- Confirm the security query to delete the LDAP connection.



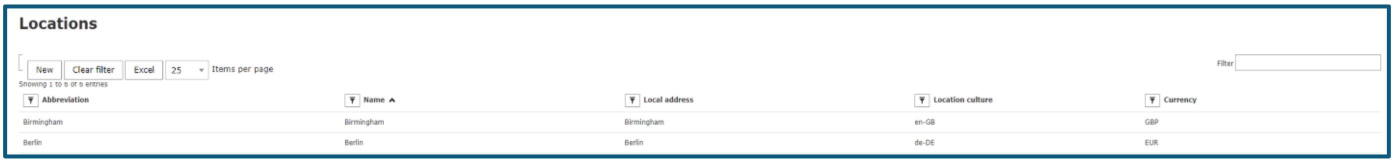
Note: You cannot delete an LDAP connection as long as there is at least one active user who logs in to WissIntra NG through this LDAP connection.

3.1.3 Error Export

WissIntra NG allows you to create an error export, which lists system or program errors. Clicking on the two fields **Start date** and **End date** opens a calendar. Here you can select the desired period. Click on the button Download export to download a password-protected .zip-file that you can send to the WissIntra NG Support.

3.1.4 Locations

In the section **Locations** you can manage your locations, i.e. you can create locations, rename or delete them. The number of possible locations depends on the licence you have purchased.

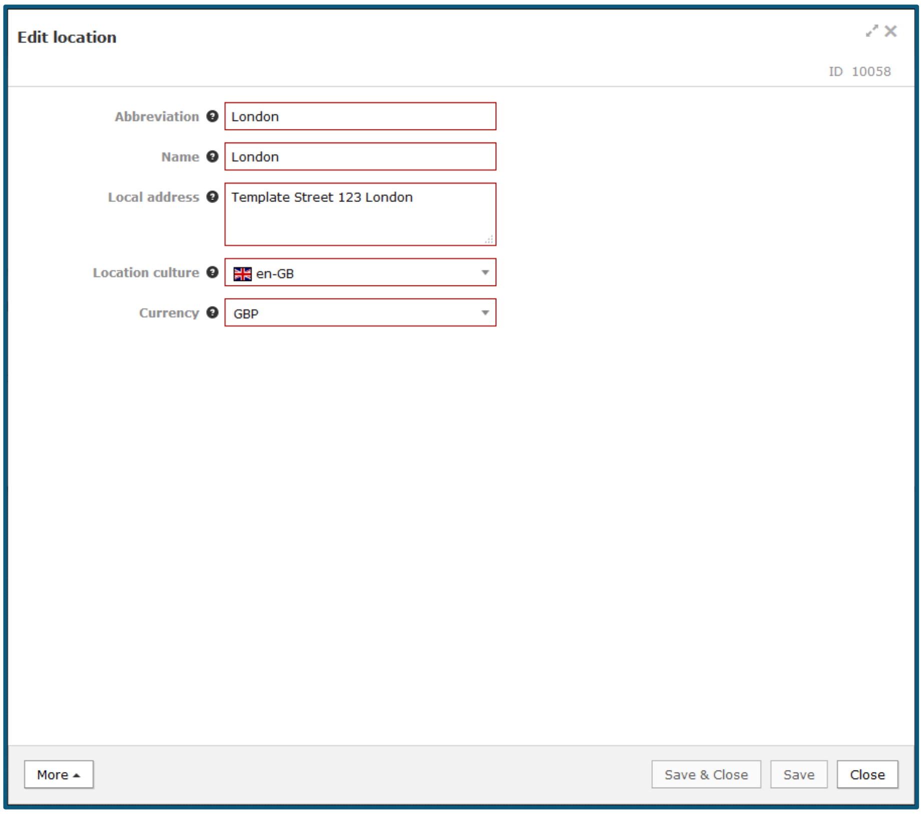


- Click on the button New to create a new location
- Fill the fields in the opening window. Enter the **Abbreviation** of the location you want to create, as well as its **Name** and the **Local address**. Select the **Location culture** and the **Currency** for the location.

Use the button Excel in the locations overview to export the locations as an Excel list.

Note: The maximum number of locations you can create is the number of locations you have purchased in your licence. If the button New is no longer selectable, you have reached the limit.

You can edit a location by clicking on it. A modal will open where you can make the changes. In addition you find the button **More** at the bottom left. Here you have the possibility to delete the entire location.



By selecting the **Location culture** you define the leading language of the Process Manager. This means that in future, the process cards can only be filled, created and deleted in this language. The content of the process cards must therefore be available in the location language in order to be able to be translated.

In the field **Currency**, you store the information which currency is to be used in this location in WissIntra NG. For example, this is used in the Action Manager in the field **Planned savings**.

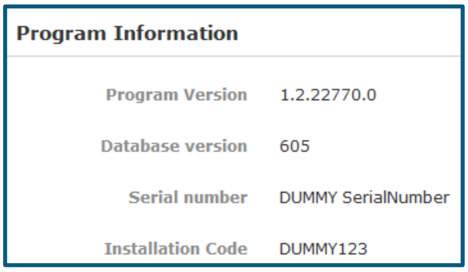
3.1.5 Search

The data of an existing database in WissIntra NG is updated automatically in regular intervals. In addition, you have the option of manual updating. By clicking **Refresh all index files** the search files in WissIntra NG are manually updated.

3.1.6 Program Information

In the section **Program Information** you will find all important information about your WissIntra NG licence.

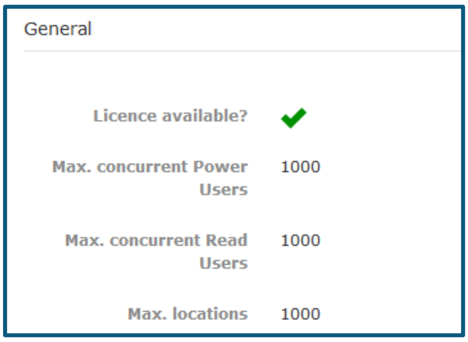
First you will get an overview of the installation data of your WissIntra NG version.

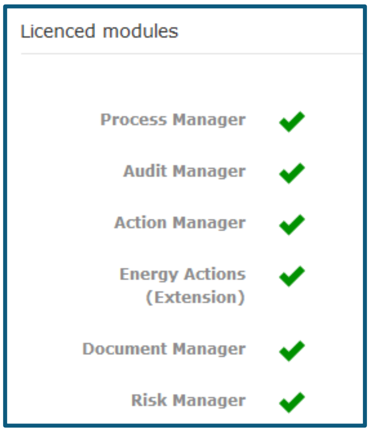


In the field **Program Version** you can see which WissIntra NG version you have currently installed on your sever. The **Database version** gives you the analogue information. The **Serial number** and the **Installation Code** are used to uniquely identify the version you are using.

> **Note:** In addition, the current version number of your WissIntra NG installation is visible at the bottom right of every page.

In the section **General** you find more information about the licence you have purchased. The green check mark indicates that the **Licence is available**. The number behind **Max. concurrent Power Users** describes the number of Power User licences you have purchased. The number behind **Max. concurrent Read Users** is the number of Read User licences you have purchased. **Max. locations** tells you the number of purchased locations.

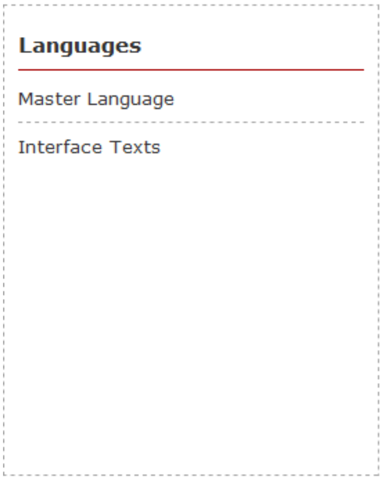




In the section **Licenced modules** you see the overview of all WissIntra NG modules. The green check mark indicates that it is available in the licence. If there is a red cross behind the module name, this module is not included in the licence.

A list of all languages available in WissIntra NG can be found in the **Licenced languages** section. The identification of the languages is made by the respective country flag and the official language abbreviation. Again, the green check mark indicates that the languages is included in your licence. The red cross means that it is not.

3.2 Languages



In the box **Languages** you can do the settings regarding the languages. These are applicable across the entire system.

- Master Language
- Interface Texts

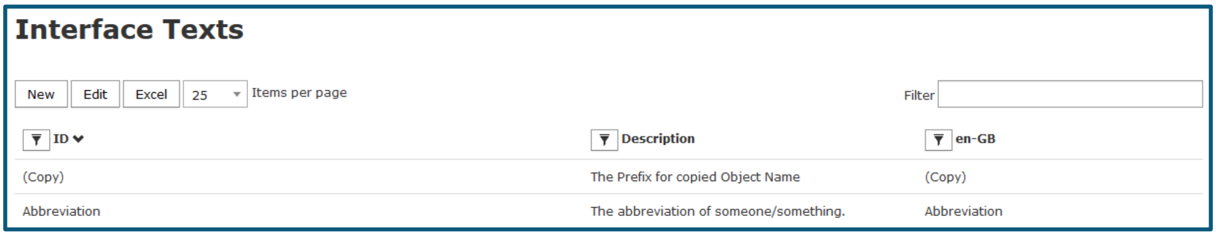
3.2.1 Master Language

The Master Language in WissIntra NG is the standard language used throughout the company. You can choose from the languages you have purchased and define it as your Company standard language.

Note: The Master Language is the standard language you have ordered. Each additional language has to be charged. If several languages are purchased, the Master Language is English by default and has to be adapted. If you purchase several languages, you can describe your content also in these languages. Please note that your content is not translated automatically by WissIntra NG.

3.2.2 Interface Texts

Interface texts are the texts in WissIntra NG defined by the system.



The **ID** defines the position in the system, where the text should appear. This ID must not be changed! The **Description** defines what the interface text is about, e.g. a headline or a tooltip, and what the text shall describe. The next column(s) show the **languages** with the texts that are actually shown in the software.

With Edit you can edit already existing interface texts. Also you have the possibility to export the information with the button Excel . With the filter, text entries can be found more quickly.

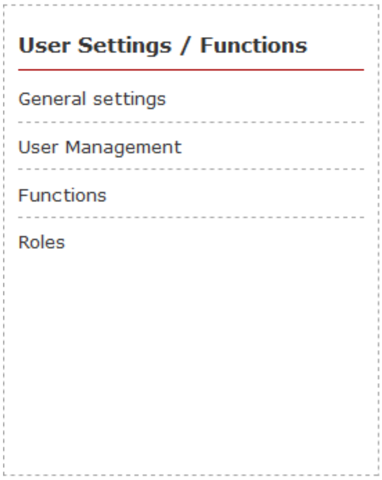
Note: Please note that the ID must not be changed!

Note: If only the master language appears in the table, the addition languages you have purchased can be added via the **Table options** in the grey bar at the top.

3.3 User Settings / Functions

In the **User Settings** you have the option to make user-specific settings. These settings apply to all modules.

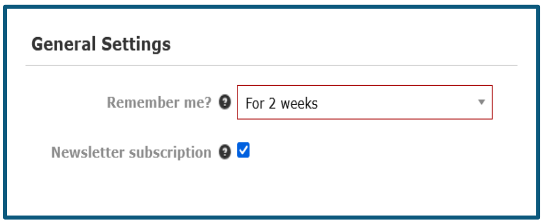
- General settings
- User Management
- Functions
- Roles



3.3.1 General settings

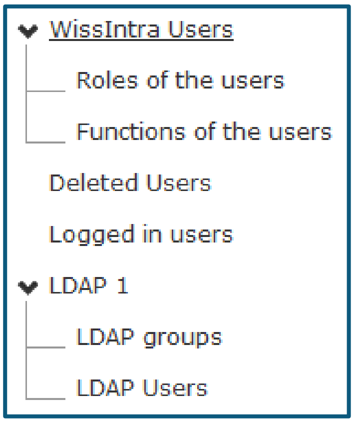
In the **General settings** you can determine whether users can log on to WissIntra NG without re-entering their login data, and how long this permanent login should remain.

The maximum duration is 6 months. The login data must then be entered again.



Newsletter subscription activates a link in the **WissIntra About** modal for all users. Each user can then subscribe individually to the official Release Notes Newsletter.

3.3.2 User Management



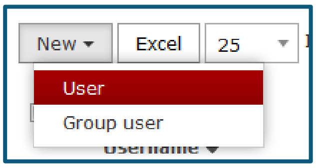
In the **User Management**, you can select different views of the users in the sidebar. You can see the currently active **WissIntra Users**, their assigned **Roles** and **Functions** as well as the **Deleted Users** and **Logged in users**. And, if you have set up an LDAP connection, you will get an overview of the **LDAP Users** and **LDAP groups**.

You can use the **Table options** to display additional columns in the various views.

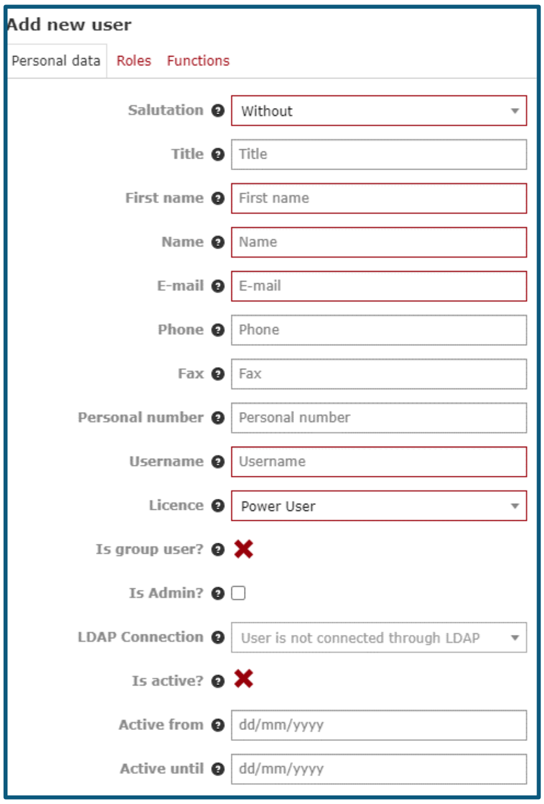
The button Excel allows you to export the created users as an Excel file.

Create a user

Use the button New to create a new **User** in WissIntra NG.

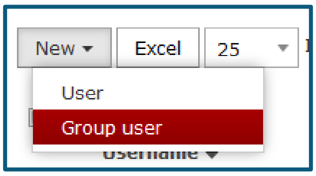


Proceed as follows:



- Click on the button New .
- Select **User** in the appearing drop-down.
- Fill the fields in the opening modal. The fields marked with red are mandatory fields that have to be completed.
- In the field **Licence** select with which licence the user can log on to WissIntra NG, as **Power User** or **Read User**.
- Select the checkbox **Is Admin** if you want the new user to be administrator in WissIntra.
- The field **LDAP Connection** tells you whether a user has been imported from an Active Directory (AD) using an LDAP connection. You can also select a desired LDAP connection here, provided that the Username and E-mail address match the data in the AD.
- You can define in the field **Active from** when the new user should be able to work in WissIntra NG.
- In addition, you can define under **Active until** when the user should have access to WissIntra NG.
- Confirm with Save & Close . This creates a new user.

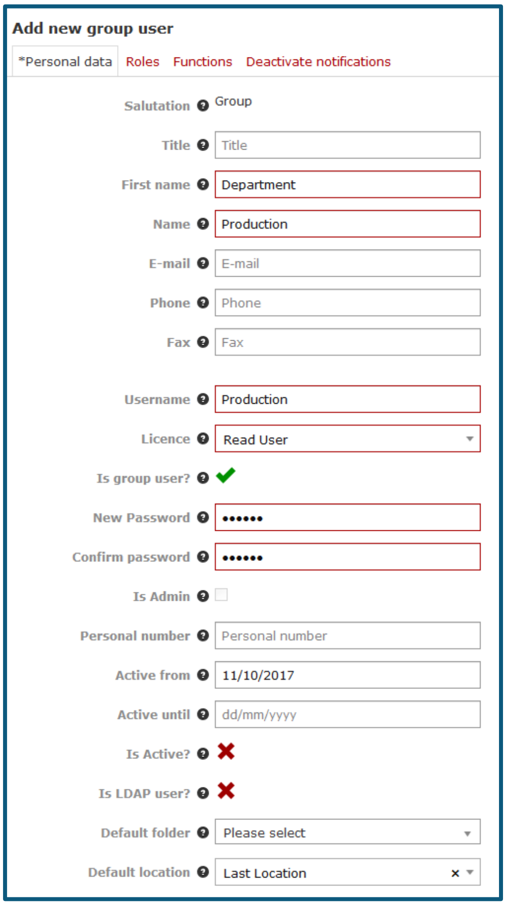
Create a Group User



WissIntra NG also offers you the possibility to create a **group user**, which can be shared by several users. For example, if only one computer is available in a production plant. For a group user no e-mail address has to be stored, since the password is given by the administrator.

Note: Changing the password can also solely be done by the administrator.

- Click on New .
- Select Group User in the drop-down menu.
- Complete the mandatory fields in the opening modal.
- Enter the correct date in the field **Active**.



At this point, you can specify the **Default folder** and the **Default location** for the group user.

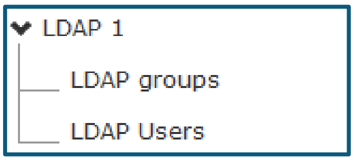
The Default folder is opened automatically as soon as the Document Manager is started, the user selects a document or creates a new document.

If a Default location is selected, it is opened automatically every time WissIntra NG is started. This option is only active if there is more than one location available.

Alternatively, you can also select the option **Last location**.

If a selected Default location is deleted, the option Last location is automatically set here.

LDAP Users

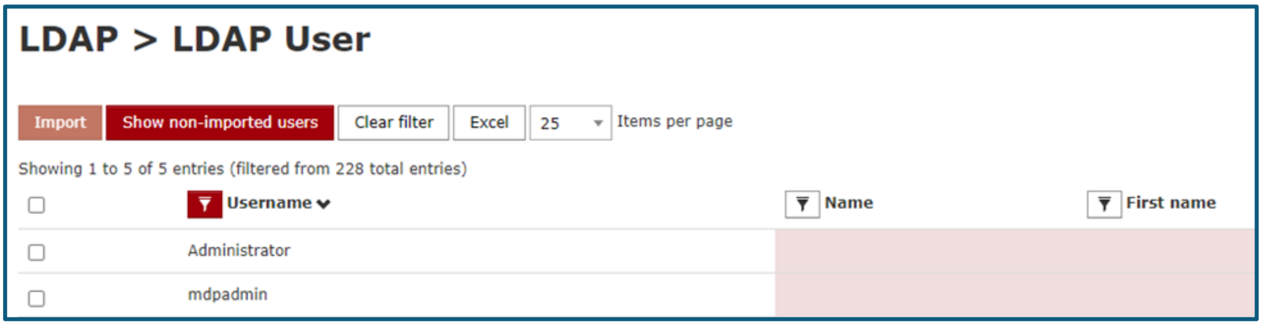


You can import users created and managed in your Active Directory directly to WissIntra NG. To do this, you first have to make the LDAP settings as described in chapter 3.1.2 LDAP Settings.

- Open the overview of the **LDAP Users** in the sidebar on the left below the desired LDAP connection in the **User Management**.

The following table lists all users that are read through the selected LDAP connection.

If there are fields highlighted in red in the table, these entries are missing in the Active Directory and have to be added before the import since these are mandatory fields in WissIntra NG. If a user has already been created in WissIntra NG, he is also marked in red and cannot be imported again.



To import LDAP users, follow these steps:

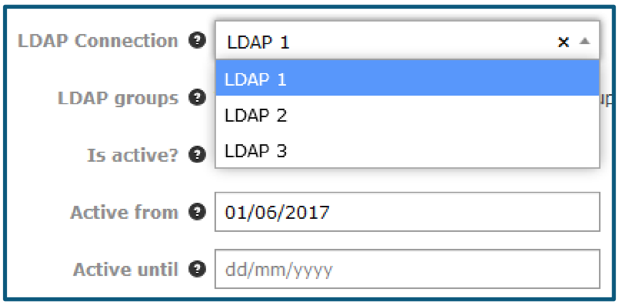
- Select the checkbox in the first column to select the users that should be imported to WissIntra NG.
- Click on the button 

.
- Now the selected users receive a welcome notification from WissIntra NG and can log on to the system.

Note: Do not forget to assign the individual users to the respective roles to grant the appropriate permissions.

Change or remove an assigned LDAP Connection

It is possible to switch or completely remove an existing LDAP connection through which a user was imported from an Active Directory.



- Navigate to the **User Management** in the **User Settings / Functions** section.
- Click on the desired user in the view **WissIntra Users** and open the user details.

The field **LDAP Connection** displays the LDAP connection assigned to the user.

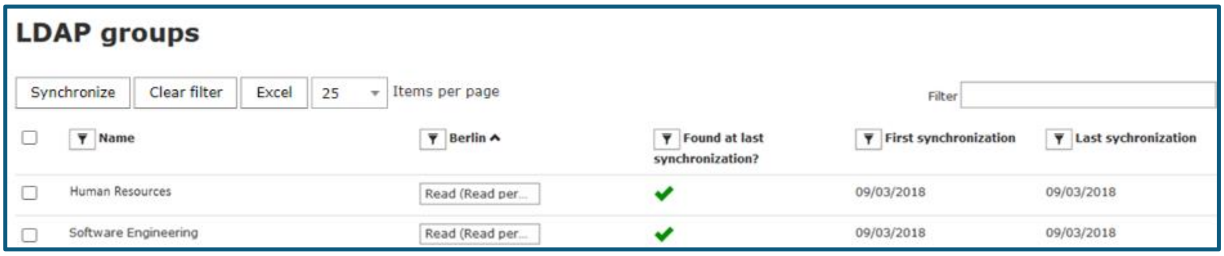
You will also see a list of the **LDAP groups** in which the user is a member within the Active Directory connected via this LDAP connection.

- Switch to the **Edit** mode.
- Select one of the available **LDAP Connections** or remove the existing entry by clicking on the **x** at the right edge of the field.
- **Save** your changes.

LDAP groups

In addition to LDAP users, the User Management also provides an overview of the **LDAP groups** created in your Active Directory.

You can use the **Table options** to display additional columns, such as the roles of groups at individual **Locations** or the **First** or **Last synchronization**.



By clicking on an entry, the detailed view opens where you can find more information about the LDAP group.

Synchronization of LDAP groups and LDAP users

The LDAP groups and LDAP users are synchronized automatically during import, login and once a night. You can also trigger the synchronization manually by clicking on **Synchronize** in the overview of LDAP groups.

Note: Groups deleted from the AD are not automatically removed from the list during synchronization.

However, you can manually delete groups that were not found at the last synchronization.

- Select the checkbox in front of the desired LDAP group.
- Click on **Delete** and confirm the security prompt.

Note: Manually deleted groups that still exist in the AD will appear in the overview again after the next synchronization.

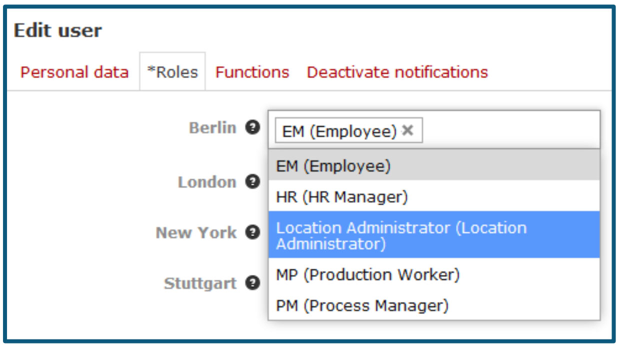
The following data of LDAP users are synchronized in the WissIntra NG database:

- Name
- First name
- Username
- Personal number
- Title
- Phone
- Fax
- E-mail
- Group assignment(s) within the Active Directory

Assign roles

In the **Roles** tab, the user is assigned to the appropriate roles for the available locations. The roles control the permissions for the user.

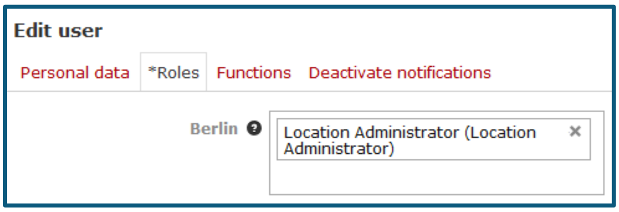
- Click in the desired location and select the relevant role for the user.
- You can assign multiple roles to the user for each location.
- If you do not assign a role to a user for one location, he cannot access it.



Note: If a user is assigned to multiple roles with different permissions, the role with the most extensive permissions is always prioritised.

To find out how to create new roles, see chapter 3.3.4 Roles.

Location Administrator



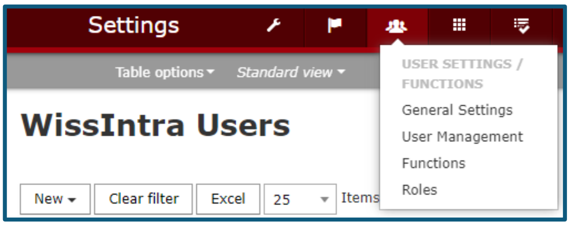
A special feature of managing users is the ability to assign the user to the role **Location Administrator (Location Administrator)**. This is a system role with special permissions. A user who has been assigned to this role has the permission to access the user management.

This means he can edit all existing users and create new users. This also applies to LDAP users.

He has the permission to see the created roles and functions and to assign them to the WissIntra NG users, but only for the location where he is the Location administrator.

A Location administrator cannot delete users from the system, only the administrator can do this.

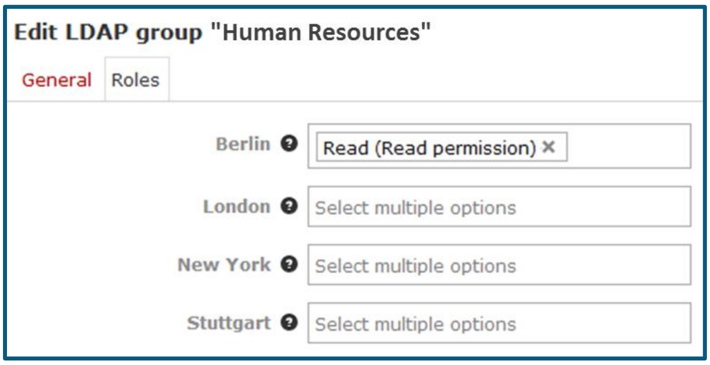
Note: Please note that the Location administrator can edit all users!



The Location administrator has access to the user management, functions and roles, but not to the other administrator settings.

If a user is assigned to the role Location administrator and he has no further role in other modules, the user is redirected to the user management directly after login and he has no access to the cockpit.

Assign roles (LDAP groups)



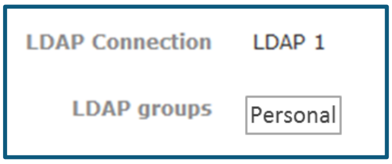
In WissIntra NG, you also have the option to assign one or more roles per location to the groups created in your Active Directory (AD).

This means that you can control your permissions for WissIntra NG directly via the Active Directory and that you do not have to assign roles to each imported user separately.

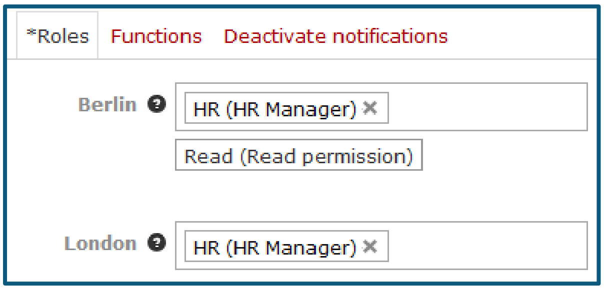
- Click on one of the LDAP groups to see the details.
- Click on **Edit**.
- In the tab **Roles**, you can assign any number of roles for each location.

Chapter 3.3.4 Roles explains how to define and create new roles.

In the **User details** you can see on the one hand, which **LDAP Connection** was used to import the user and on the other hand, which **LDAP groups** he is assigned to in the Active Directory.



The tab **Roles** in the user details gives you an overview of the roles that the user is assigned to directly or via LDAP group assignment in WissIntra NG for the individual locations.



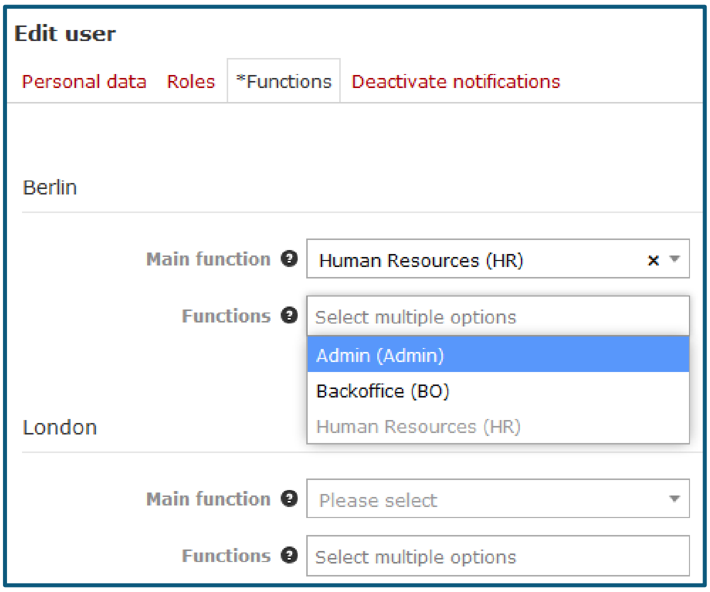
Note: The roles assigned via group assignment cannot be edited here.

Assign functions

In the tab **Functions** the users are assigned to functions, which allows them to be grouped according to their job in the company. The functions are divided into **Main function** and **Functions**.

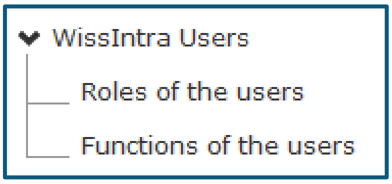
- Click in the field and select the available function in the drop-down menu.
- You can assign only one main function to a user but several functions.

In chapter 3.3.3 Functions you will learn how to create new functions.



Overview of user roles and functions

In the overviews **Roles of the users** and **Functions of the users**, you can see all WissIntra NG users with their assigned roles or functions per location.

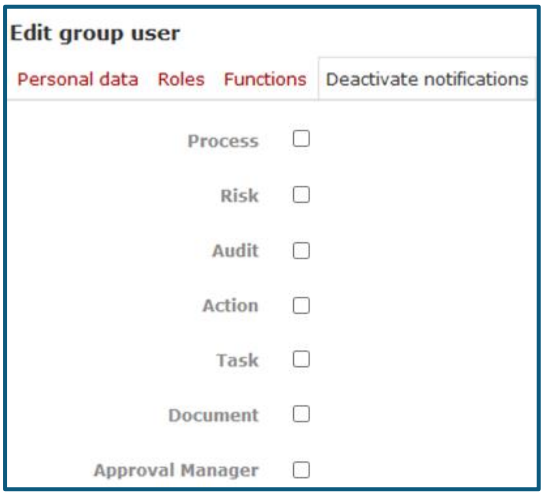


You can select the desired locations using the table settings. Use the button Excel to export the displayed list as an Excel file.

Deactivate Notifications

As described in chapter 3.1.1 Notifications you can choose who is able to deactivate notifications. If you have selected **Everyone** or **Administrator only** here, you can deactivate the notifications for every user or group user individually in the tab **Deactivate notifications**.

You can do this setting for each module separately by selecting the check box of the module from which the user should not receive notifications any more.

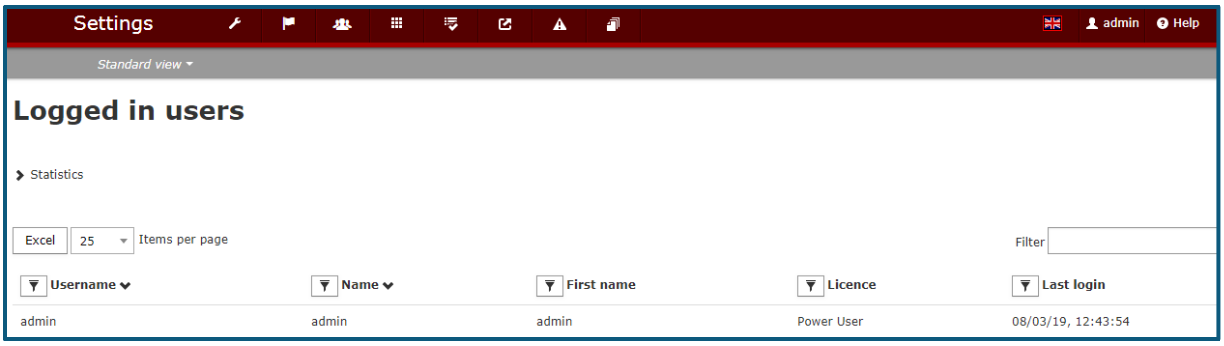


Deleted Users

This table lists all **Deleted Users** that have been created in WissIntra NG and deleted. They are marked with "_deleted" in the system. Clicking on a user opens a modal where you can see the user details.

Caution: Once a user is deleted, he is actually deleted from WissIntra NG. If necessary, the user must be created again.

Logged in users



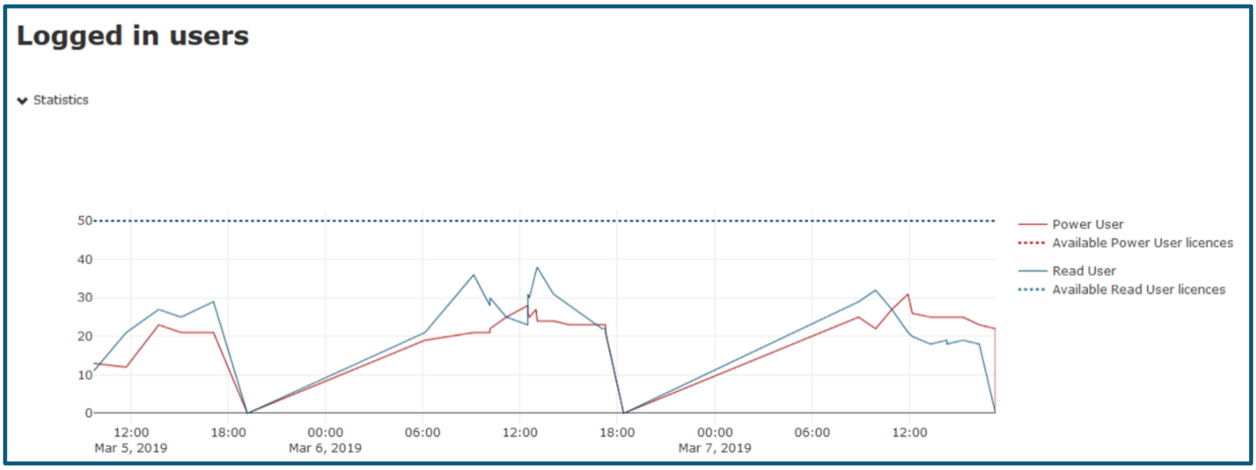
In the view Logged in users, you can see all currently logged in users. The license type (Power User or Read User) and the time of the last login are displayed.

Note: All running sessions are counted. That means that if a user is logged in in several browsers or computers, he will be listed several times in this view.

Statistics (overview of used licences)

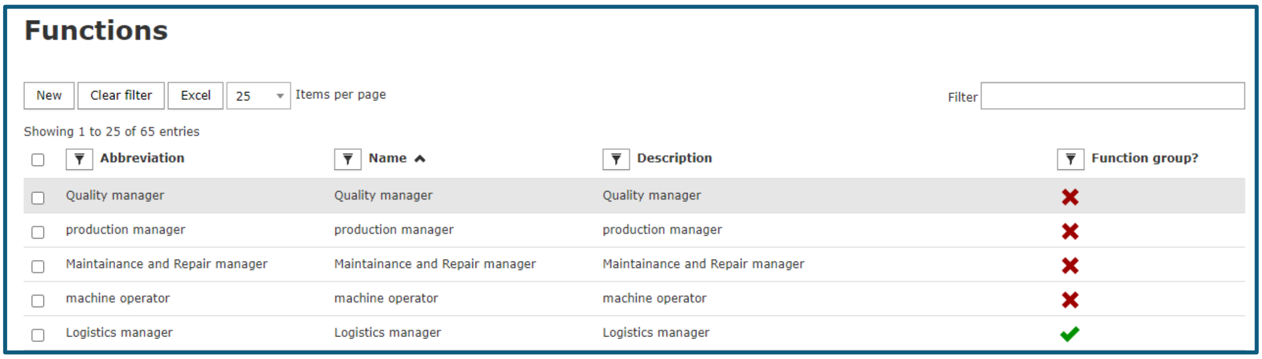
In the view **Logged in users**, you can also view the **Statistics** for the Power and Read User licences available and currently used in your system in a diagram.

The data of the last 7 days are displayed here. You can use the zoom to limit the range.



3.3.3 Functions

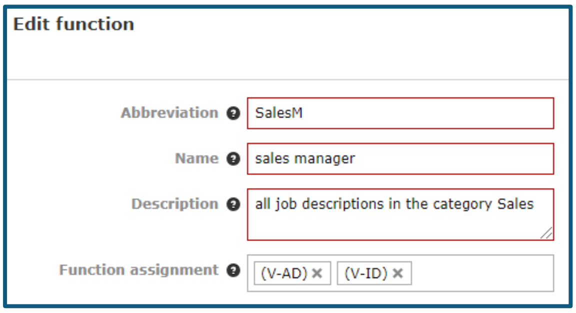
Here you can find all **Functions** created in WissIntra. A function is to be understood as a position in your organisation to show who is responsible for the process, the action and so on.



Abbreviation	Name	Description	Function group?
Quality manager	Quality manager	Quality manager	✗
production manager	production manager	production manager	✗
Maintainance and Repair manager	Maintainance and Repair manager	Maintainance and Repair manager	✗
machine operator	machine operator	machine operator	✗
Logistics manager	Logistics manager	Logistics manager	✓

To create a new function in WissIntra proceed as follows:

- Click the button New .
- This opens a modal. Enter the appropriate **Abbreviation** and the **Name** of the function.
- Enter a **Description** that explains the function.
- The field **Function assignment** can be used to assign a function group. This group allows to summarize different functions into a superordinated group.



- The green checkmark in the overview indicates that this function is assigned to a group.

You can edit an existing function by clicking on it. If the function will be already assigned to a group, it cannot be assigned as an own group afterwards.

The button Excel allows you to export the created functions to an Excel file.

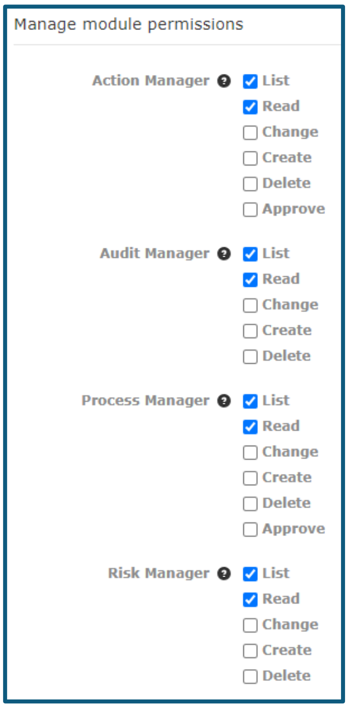
3.3.4 Roles

In the section **Roles** all roles created in WissIntra NG are listed. Only the assignment of a user to a particular role gives him the permissions within WissIntra NG, since this controls the access to the individual modules and locations.

Note: Please note that the role Location administrator is not listed here since the assignment of this special role is managed in the user management.

The basics for the permissions and roles in WissIntra NG can be found in the chapter 2.4 Permission concept.

To create a new role, proceed as follows:



- Click on the button New .
- Enter the **Abbreviation** of the role and a **Name**.
- In the **Description**, you have to describe more details of the role. For example, a description for the “Process Manager” could be “Process Managers can edit existing processes and change the content. It is not possible to create new processes or delete existing ones.”
- Continue to adapt the module permissions by selecting the check boxes for the desired permissions. In the example above the “Process Supervisor” only needs the permissions List, Read and Change for the Process Manager.
- The role "Location Admin" is additionally listed in the listing of module permissions. However, he has no authorization to change or delete anything.

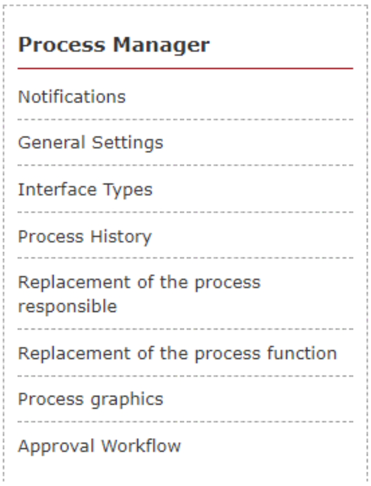
Note: Permissions are assigned independently. Consider that the permission **Delete** requires at least the permission **List** and **Read**.

The button Excel allows you to export the created roles to an Excel file.

3.4 Process Manager

In the box **Process Manager**, you can make the settings that have an impact on the WissIntra NG Process Manager:

- Notifications
- General settings
- Interface Types
- Process History
- Replacement of the process responsible
- Replacement of the process function
- Process graphics



3.4.1 Notifications

When you click on **Notifications** the modal opens, which you already know from the Basic Settings described in chapter 3.4.1 Notifications. The tab **Process** will be opened directly and you can enter WissIntra NG users, specific roles or external e-mail addresses to be informed about events regarding processes.

3.4.2 General Settings

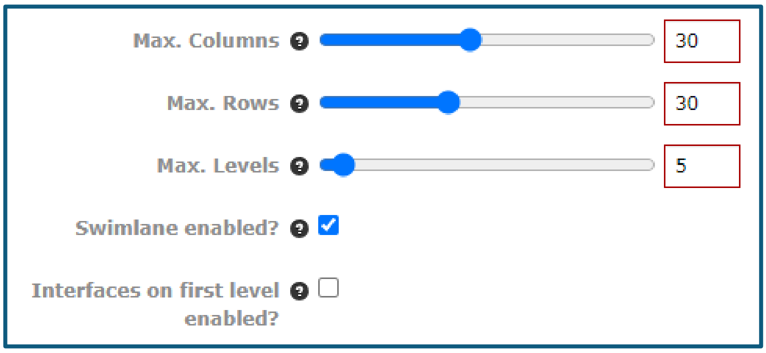
In the section **General settings** you have the option to make settings for the process landscape. At **Max. Columns** and **Max. Rows** you can enter the possible number of columns and rows up to a maximum of 50. The number of **Max. Levels** is 100.

By selecting the checkbox **Swimlane enabled?** you allow to build processes in Swimlane mode. This is a general decision for the entire system.

> **Caution:** Please note that your decision is binding. After creating the processes, you cannot switch between Matrix and Swimlane. If you want to use the other mode, you have to re-create the process.

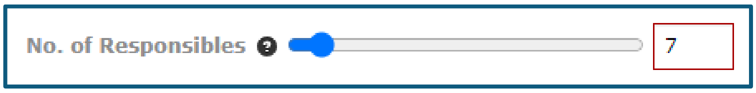
> **Note:** These settings determine the appearance of the process landscape for the entire system.

In addition, you can use the option **Interfaces in first level enabled?** to decide whether interfaces should be created from or to the first level in your process landscape or not.



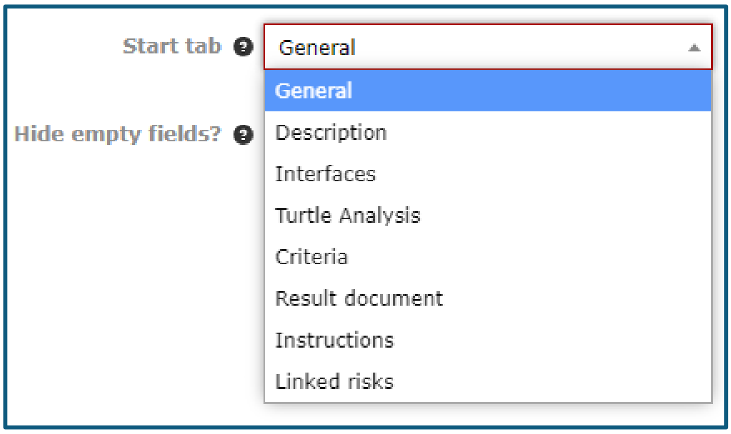
Use the other fields in this modal to determine the settings for your process cards.

The slider **No. of Responsibles** allows you to define how many users can be responsible for a process, the maximum number is 50.



Note: Remember that, by giving the process responsibility to a WissIntra user with Power User licence, you enable him to edit these processes as long as he has at least the permission **Read** for the Process Manager.

Furthermore you can define the **Start tab** that is shown first when opening a process card.



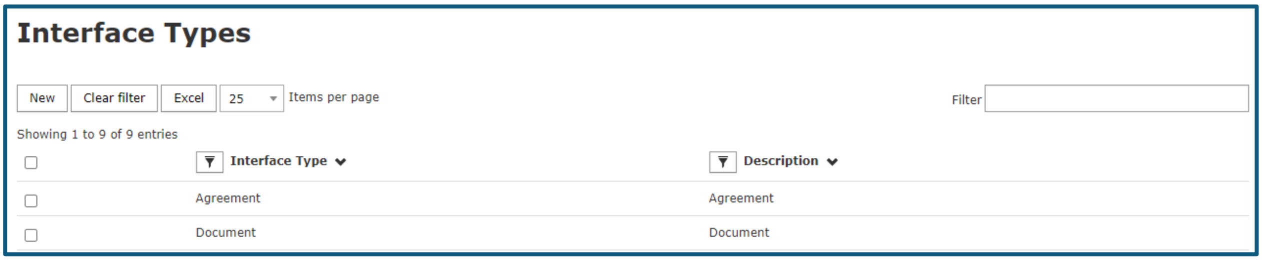
With the option **Hide empty fields?**, you decide whether the fields that are not filled in the tabs **Description** and **Turtle Analysis** of the process card are hidden, the filled fields are arranged accordingly.

This option also applies to the print functions in the Process Manager.

3.4.3 Interface Types

Interfaces are touch points inside and also outside a process. These interfaces can occur within a department or even across departments and can even point to external.

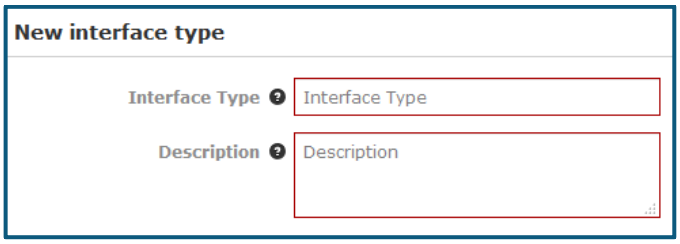
Interfaces differ in their type but not in their representation. They are always seen as dependencies among one another and are described as such.



In the section **Interface Types** you get an overview of the interfaces already created. You can export the interfaces to an Excel file by clicking on Excel . When you click on one of the entries you can edit it or use More to delete it.

To create a new interface proceed as follows:

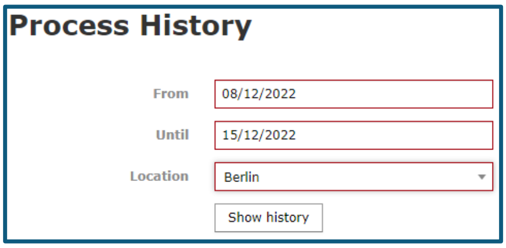
- Click on New and enter a name for the **Interface Type**
- Fill in a **Description** for the Interface Type
- Click on Save & Close to create the interface type.



3.4.4 Process History

The Process History shows all process changes of a location within the selected period.

- Click on the date fields **From** and **Until** to open a calendar where you can select the desired date.
- Use the button Show history to generate the history.

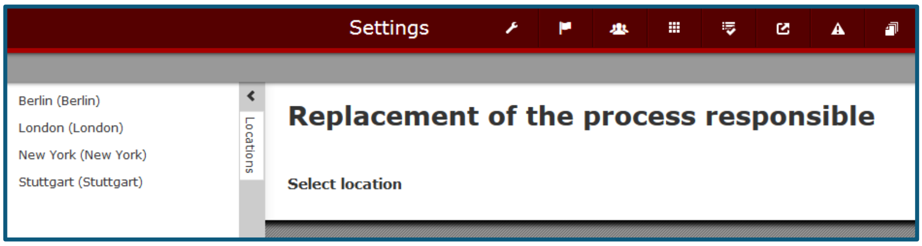


Note: The time to load the process history depends on the selected period. The longer it is, the longer it can take.

3.4.5 Replacement of the process responsible

If a user needs to be exchanged in several processes, WissIntra NG offers the possibility of bulk changes. Proceed as follows:

- Start selecting the location where you want to replace the process responsible.

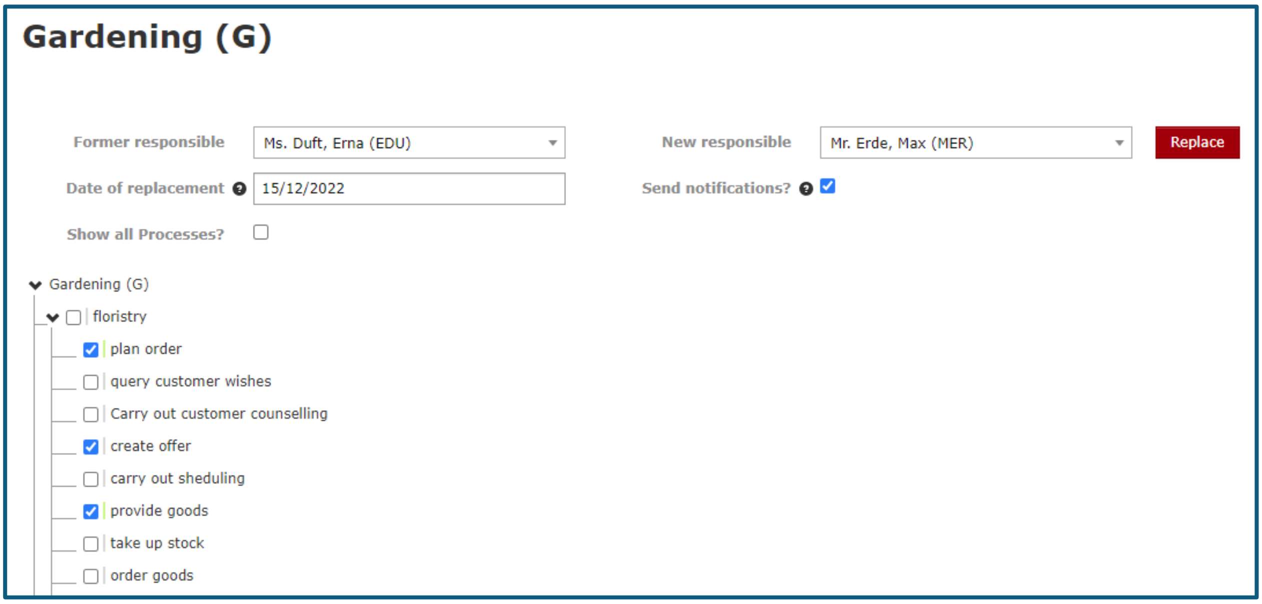


- Select the **Former responsible** and the **New responsible** in the drop-down fields.

You can also define a **Date of replacement** for the changes. This is useful when it is known in advance that an employee will not be active for a certain period of time, e.g. for parental leave.

Specify whether to **Send notifications?** for this change by selecting the checkbox. Consider that the number of e-mails sent here can be very high. E-mail notifications are only sent if they have been configured in advance. If not, no notifications are sent.

The appearing treeview displays all processes in which the selected user is the responsible. By selecting the checkbox **Show all Processes?** you can see all processes of this location.



- Select the appropriate processes where you want to execute the replacement.
- Click on Replace to finish the replacement.

Note: If both users are already assigned to the process, the higher position is kept and the user to be replaced is removed from the process.

Note: In the case of locked processes, the system tries to execute the changes later. If the selected user is no longer responsible for a process, no change is made.

3.4.6 Replacement of the process function

Similar to the procedure for replacing the process responsible, you can replace the process functions.

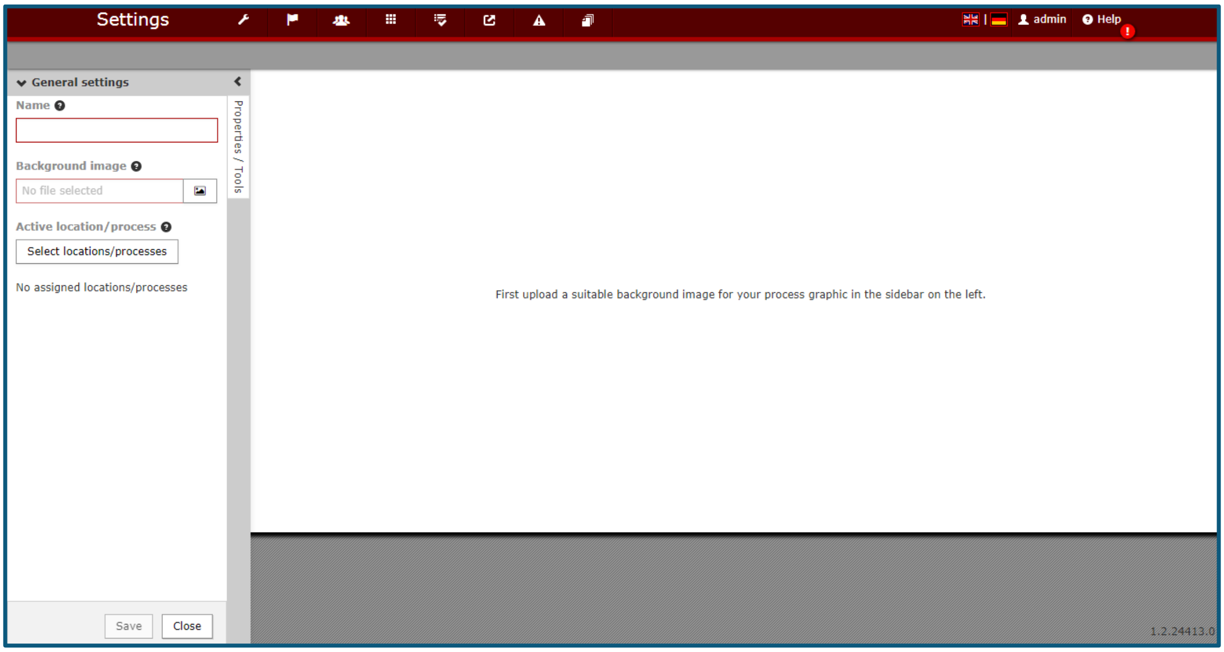
3.4.7 Process graphics

As an administrator, you can create a new process graphic in the settings.

- Navigate to **User** and select **Settings** .
- In the settings overview click on **Process graphics** within the box **Process Manager**.

The system displays an overview of all process graphics created so far.

- Click on New .



General settings of the process graphic

- Give the process graphic a descriptive **Name**.
- Click on the image icon to upload any **Background image**.

Note: The background image is scaled proportionally according to the screen size. The optimal dimensions for displaying the image in the Process Manager are 1836 px x 866 px.

Caution: The file size of the background image may not exceed 4 MB.

- Click on the button **Select locations/processes**.

A modal with all available locations and processes with at least one sublevel opens.

- Select the locations or processes for which the new process graphic should be displayed.

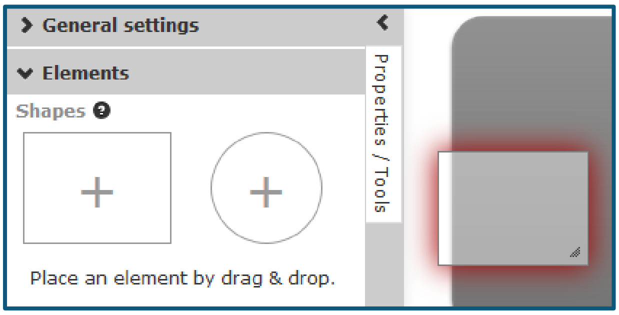
Caution: As soon as you select a location in the section **Active for location/process**, the process graphic is activated! If you have not finished the graphic yet, please leave this area empty so that the graphic is not visible for the users.

Caution: You can select the same location or process in the section **Active for location/process** in several process graphics. However, only the initial assignment of a location or process to a process graphic is taken into account. As soon as you remove this, the next assignment stored in the system is automatically valid.

Elements of the process graphic

As soon as you have uploaded a background image, the category **Elements** appears in the sidebar. There you can choose between two shapes: Rectangle or circle/ellipse.

- Drag the desired shape onto the background image and place it.

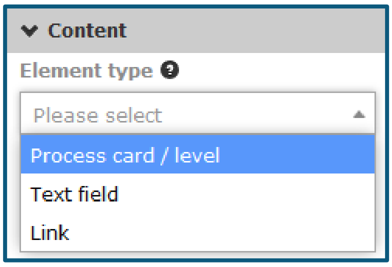


Note: Make sure that the elements do not overlap, otherwise the linking functionality may be impaired.

Content of an element

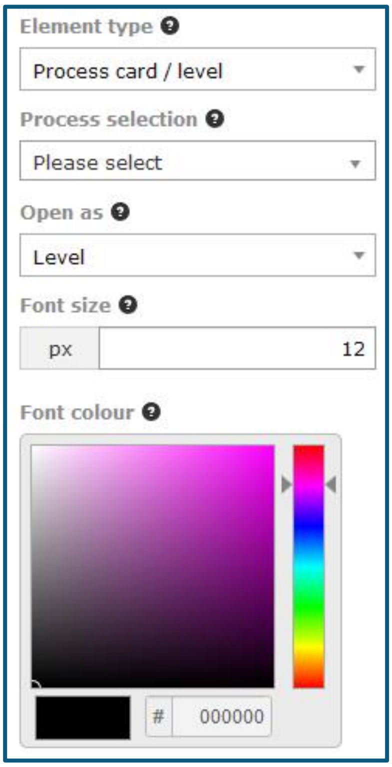
As long as an element is active, the left sidebar displays the categories **Content** and **Size and position**. You can recognize a selected element by its red border.

- Click on the desired element.
- Select the **Element type**. You can choose between **Process card / level**, **Text field** and **Link**.



Process card / level

You can use this element to link directly from the process graphic to a **process card** or **process level**. This is also possible across locations. In this case you should keep the different user permissions in mind.



- In the field **Process selection**, select the process to which you want to link.
- In the field **Open as**, select whether you want to open the process card itself or, if available, the level below it.

After you select a process, the process title is automatically displayed within the element.

- Enter a desired value in the field **Font size** or use the arrow keys "up" and "down" to adjust the value step by step (not possible in Internet Explorer).
- You can also change the **Font colour** of the displayed process title. To do this, either select a colour using the colour field or enter a HEX colour code.

Text field

You can use the **Text field** to place headlines or other information on your process graphic.

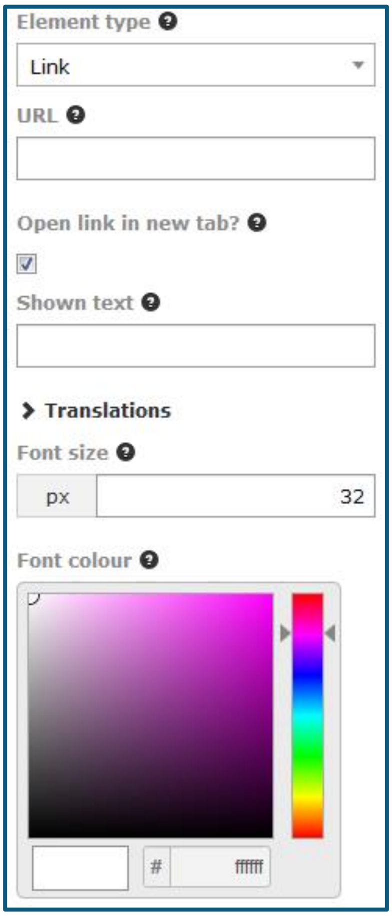
- Enter the desired text in the field **Shown text**.

If you use WissIntra NG with several languages, you have the option of entering the text for each language.

- To do this, expand the section **Translations** using the arrow › and enter the desired translated texts.
- Format the text as required by changing the **Font size** and **Font colour**.

Link

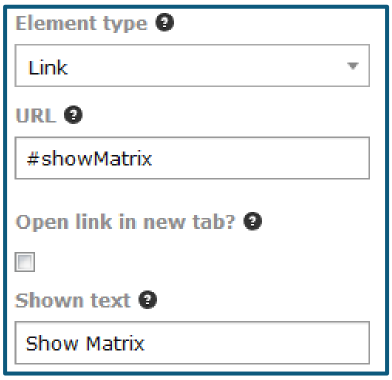
The element type Link gives you the possibility to link from your process graphic to web pages, servers, etc.



- Enter the complete address in the field **URL**. Please note that the URL must be specified including the prefix, such as “http://” or “FTP://”.
- Select the checkbox **Open link in new tab?** if you want this behaviour.
- In the field **Shown text**, specify which text should be visible for the user within the element.
- If necessary, complete the **Translations** of the displayed text.
- Format the **Font size** and **Font colour** of the displayed text.

Link to the process level

You can use a **Link** element to link from the process graphic to the process matrix or the Swimlane.



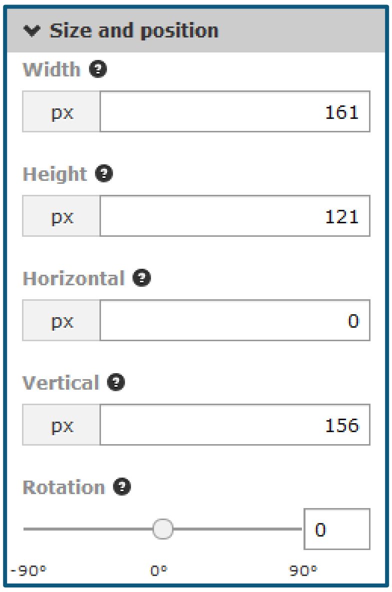
- Enter the parameter **#showMatrix** in the field **URL**.
- Select a **Shown text**, e.g. “Show Matrix”.

Please note, that with this, the process level is always opened in the same tab, regardless of whether the option **Open link in new tab?** was selected or not.

- Click on **Show process graphic** to return.

Note: We recommend that you regularly **Save** the status of your process graphic, either by clicking on the button at the bottom left or using CTRL + S.

Size and position of an element

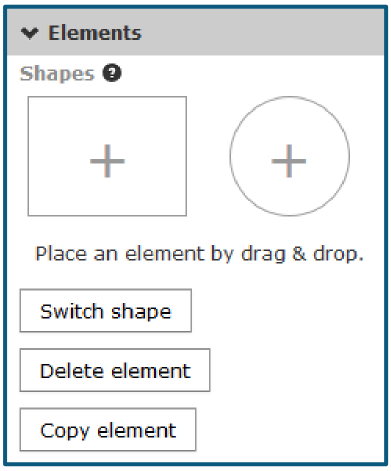


You can position and resize the elements on the process graphic with the mouse. However, you can also specify the position and size of an element with pixel accuracy.

As long as an element is selected, the category **Size and position** is displayed in the sidebar on the left under the category **Content**. You can recognize a selected element by its red border.

- The fields **Width** and **Height** show the dimensions of the element. Either enter the desired dimensions or use the arrow keys “up” and “down” to adjust the value step by step (not possible in Internet Explorer).
- The fields **Horizontal** and **Vertical** show the position of the element, measured from the upper left corner of the element. Enter the desired value here or use the arrow keys “up” and “down” for a step-by-step adjustment (not possible in Internet Explorer). Alternatively, you can also select the element and use the arrow keys to move it.
- For a **Rotation** of the element please use the slider or enter the degrees directly by which the element should be rotated.

Changing the shape of an element



You can change the shape of an element.

- Select the desired element.
- Click on **Switch shape** in the category **Elements** in the sidebar on the left.

This turns a rectangle into a circle or ellipse and vice versa.

Deleting an element

- Select the desired element.
- Click **Delete element**. Alternatively, you can also press DEL.
- Confirm the confirmation prompt.

Note: Before leaving the process graphic, please click on **Save** again or press CTRL + S.

Copying an element

You can copy already created elements on the process graphic.

- Select the desired element.
- Click on **Copy element**.

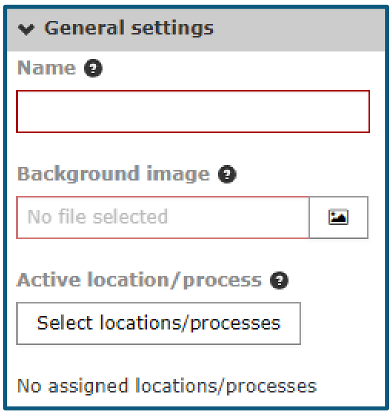
The copy of the element appears slightly offset next to the original.

- Alternatively, you can also use the shortcut CTRL + C.

Activating the process graphic

To activate the process graphic, you have to assign it to one or more locations or processes.

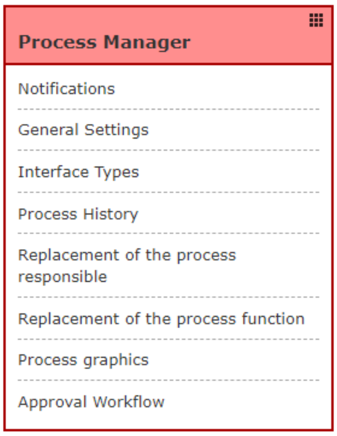
- In the field **Active for location/process** in the category **General settings**, select the locations or processes for which you want to display the process graphic.
- **Save** the process graphic.
- Click on the **Close** button to return to the overview.



3.4.8 Process Approval

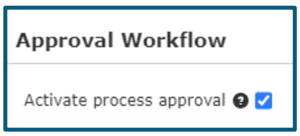
As an administrator, you can activate the process approval in the settings.

- Navigate to **User** and select **Settings**.
- In the settings overview click **Approval Workflow** within the box **Process Manager**.



The system displays the management of process approval.

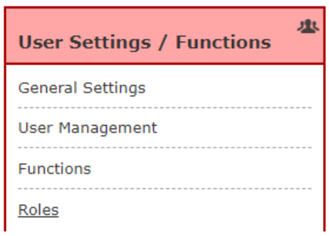
- Check **Activate process approval** and save your settings.

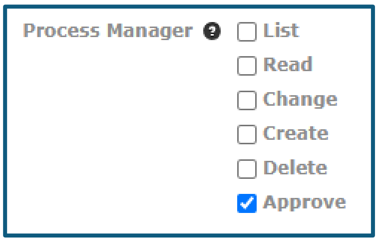


After checking, all newly created processes have to be approved.

The newly created processes can be approved by any system administrators and users who had been authorized.

- In the settings overview click on **Roles** within the box **User Settings / Functions**.

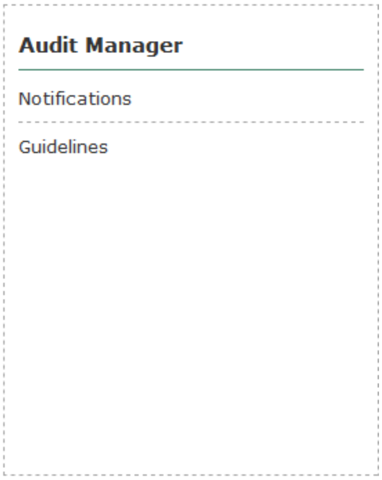




- Select an existing role or create a new one.
- In the Process Manager area, the listing **Approve** now appears.
- Check to release.
- Now assign the role of the approvers to the selected users of the user management.

Note: You can create a separate role for the process approver only. This role can now be assigned to any user who has a power user license.

3.5 Audit Manager



In the box **Audit Manager**, you can make the settings that have an impact on the WissIntra NG Audit Manager:

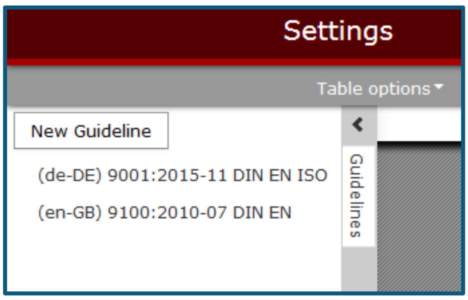
- Notifications
- Guidelines

3.5.1 Notifications

When you click on **Notifications** the modal opens, which you already know from the Basic Settings described in chapter 3.1.1 Notifications. The tab **Audit** will be opened directly and you can enter WissIntra NG users, specific roles or external e-mail addresses to be informed about events regarding audits.

3.5.2 Guidelines

In WissIntra NG, you have the option to manage guidelines represented by audit criteria lists. Thus, processes can be linked to individual criteria. This allows you to make your processes conform to DIN standards, which can make your next audit easier.



When you click on Guidelines a new page opens where you can see the already existing guidelines in the sidebar on the left.

Clicking on one of the guidelines shows a table with all chapters of the guideline. Click on to open the chapter to see the subchapters and criteria.

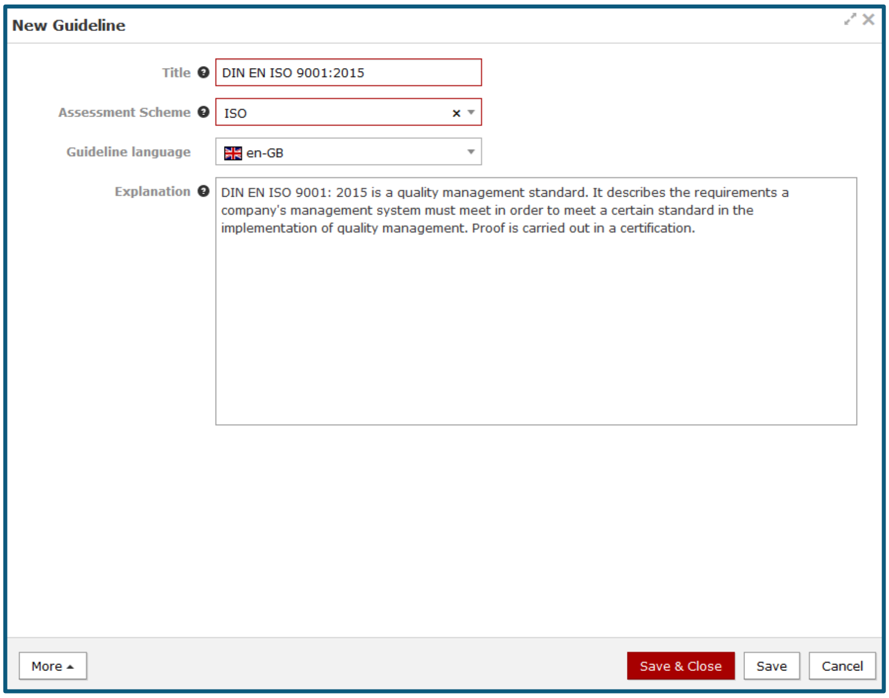
With the button Excel you have the possibility to export the chapters in an Excel file.

The button New Chapter allows you to create a new chapter within the guideline.

If you select the checkbox in front of a chapter you can either **Delete** it or create a **New Subchapter**.

New Guideline

- Click on New Guideline to create a new guideline.

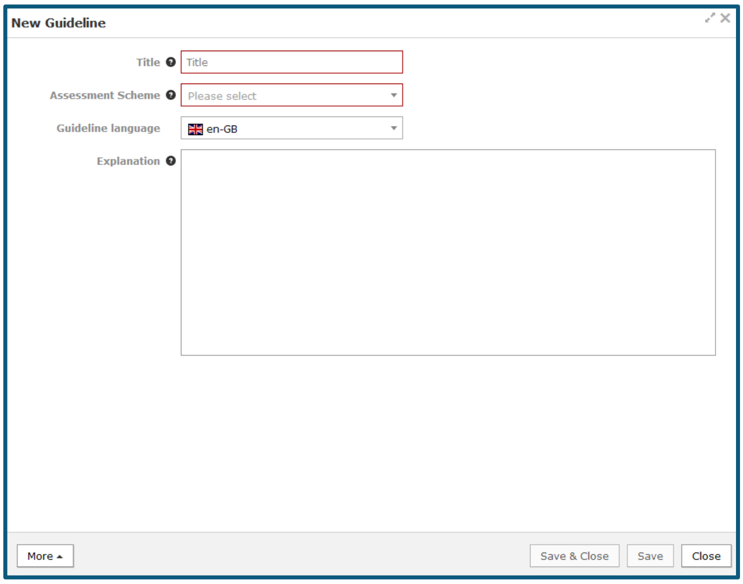


- Enter the **Title** of the standard that you want to create in WissIntra NG.
- Select ISO or VDA in the field **Assessment Scheme.**
- In addition, select the **Guideline language** in which the content is created and maintained.
- In the field **Explanation** you can describe the content of this guideline.

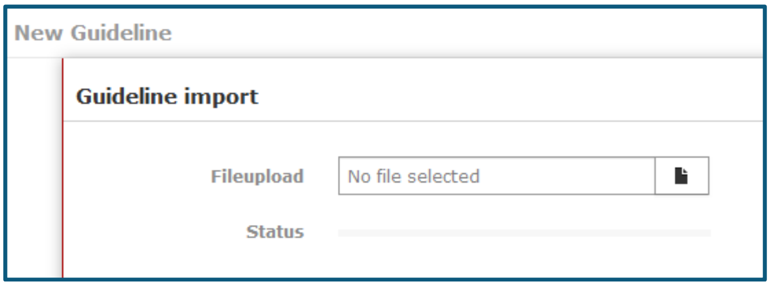
Import Guidelines

- Click on New Guideline which opens the empty modal.

Caution: Do not fill any of the fields! They will be filled automatically during the import.

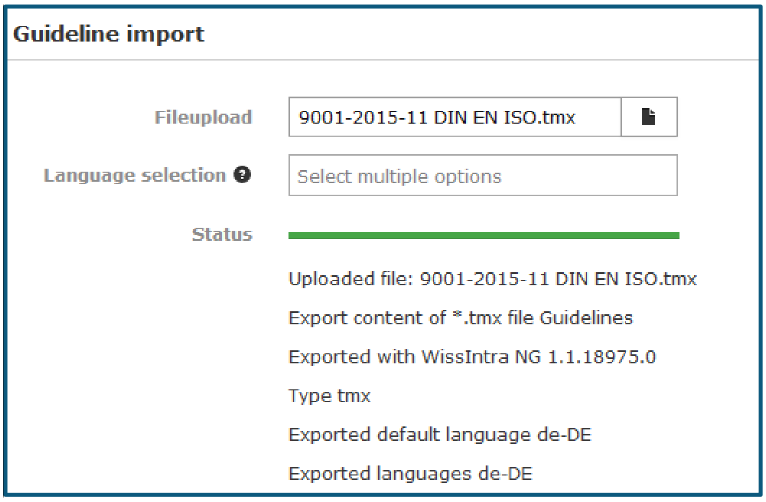


- Navigate to **Import Guideline** via More.



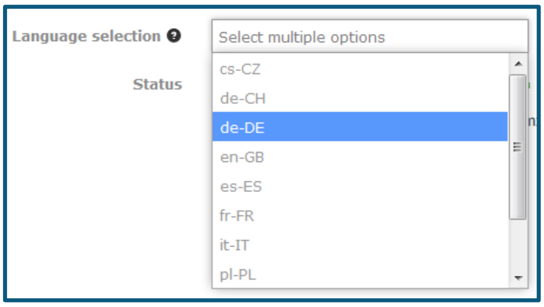
- Click on and select the appropriate *.tmx file to upload.

Note: Once you have selected a file, the import check will start. The status is indicated by the green bar.



As soon as the status bar is completely green, all relevant data of the file are shown.

- Select the language of the guideline to be imported in the field **Language selection**. If several languages have been created in the *.tmx file, you can select them here.



Note: Make sure that the file you uploaded has the appropriate content for the selected language.

- Click on Import.

Note: After a successful import, both modals will be closed and you get back to the overview.

The imported guideline appears in the list of audit criteria lists in the sidebar on the left and can be used.

Edit Guidelines

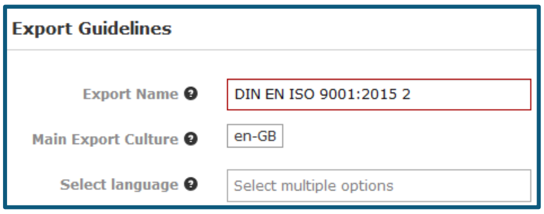
If you want to edit a guideline you have two options:

Edit internally

- Click on the guideline in the sidebar and on the chapter you want to edit.
- In the opening modal you can do the changes in the tabs **General** and **Criteria** directly.
- To translate a guideline you first have to change the content language in the language selection. If you click on that appears on mouse-over on the left of the guideline in the sidebar, you can translate the guideline name and details. By clicking on the chapters you can translate them and the criteria.

Edit externally

- This can be useful if you want to do several changes at once.
- Open the modal of the guideline by clicking on .
- Click on More and on **Export of Guideline.**
- If you want the guideline to be translated externally you have to select the guideline language and the desired languages in the field **Select language**.

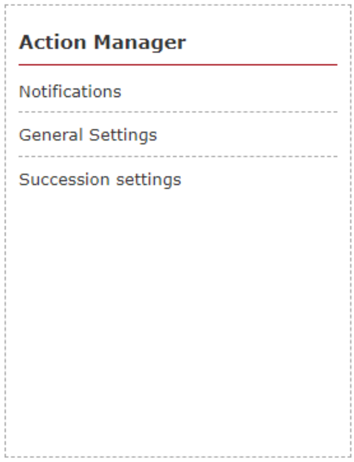


- Click on Download export .
- You can then edit the exported *.tmx file.
- To update the guideline open again the modal via and click on More and **Import Guideline**.
- Follow the instructions in the chapter Import Guidelines.

Note: Please note that WissIntra NG only recognizes an edited guideline as a correct update if it has been previously exported directly from WissIntra NG.
If you edit an older version of the *.tmx file, WissIntra NG will save it as a new guideline (Title_import_New date of import).

Note: The respective audit criteria list is sent to you as *.tmx file. WissIntra NG stores the guideline as follows: Title_import_Date of import.

3.6 Action Manager



In the box **Action Manager**, you can make the settings that have an impact on the WissIntra NG Action Manager:

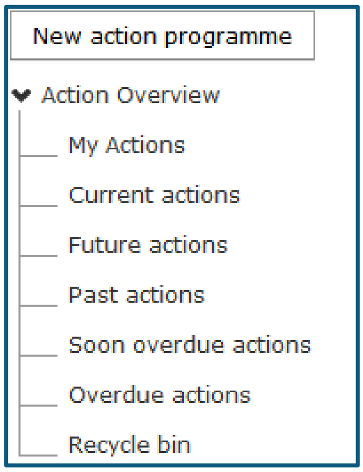
- Notifications
- General Settings

3.6.1 Notifications

When you click on **Notifications** the modal opens, which you already know from the Basic Settings described in chapter 3.1.1 Notifications. The tab **Action** will be opened directly and you can enter WissIntra NG users, specific roles or external e-mail addresses to be informed about events regarding actions. Further settings can be made in the tab **Task**.

3.6.2 General Settings

Recycle bin settings

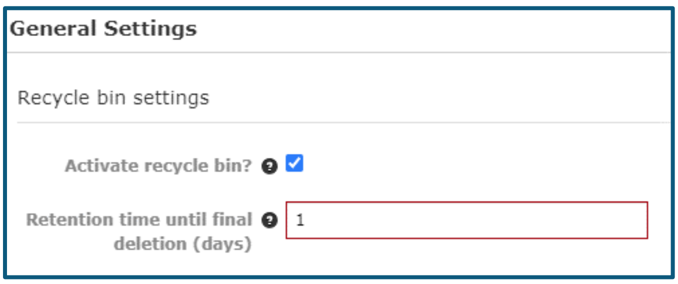


As administrator you can activate the Recycle bin for the WissIntra NG Action Manager so that deleted actions are not immediately removed from the system, but are moved to the virtual folder Recycle bin. This folder is visible only for administrators in the sidebar of the Action Manger on the left.

You can define how long the deleted tasks should be kept in the recycle bin before they are permanently removed from the system. The system checks daily at 0:00 am (UTC) how long an action has already been stored and compares it with the set number of days.

Administrators can also restore the deleted task from there.

- Select the checkbox **Active recycle bin?**.
- In the field **Retention time until final deletion (days)** enter the number of days a deleted action should be retained in the recycle bin.



Note: If you enter the number “0” in the field **Retention time until final deletion (days)**, the actions will never be permanently removed from the system. They remain in the recycle bin after deletion and can be restored at any time.

Note: When the recycle bin is activated, notifications for deleting actions are sent as soon as they are moved to the recycle bin.

Restore deleted actions

As an administrator, you can access the Recycle bin and restore deleted actions.

- Click on **Recycle bin** in the sidebar on the left within the Action Manager.

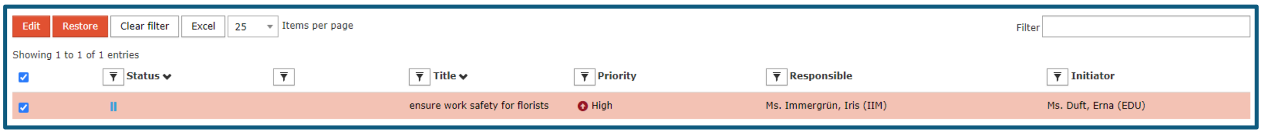
A list of all deleted actions is displayed.

You can use the table options to display further information, such as „Deleted by“ or „Deleted at“.

You now have two option for restoring a deleted action. Via table view or in the modal.

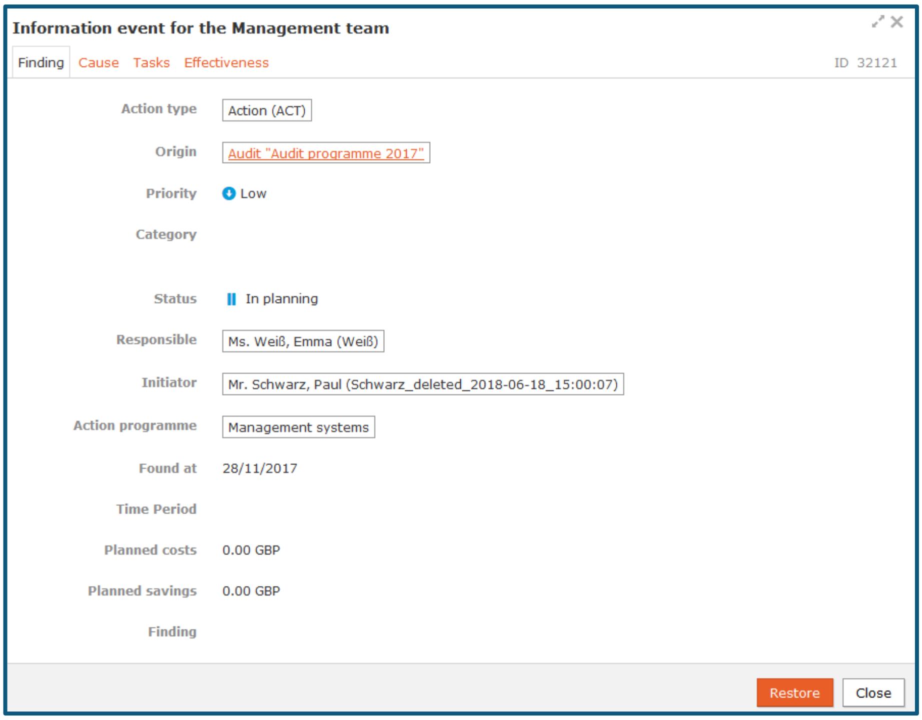
Via table view:

- Select the desired action by clicking on the checkbox on the left.
- Click on the button **Restore**.
- Confirm the confirmation prompt.



Via the modal:

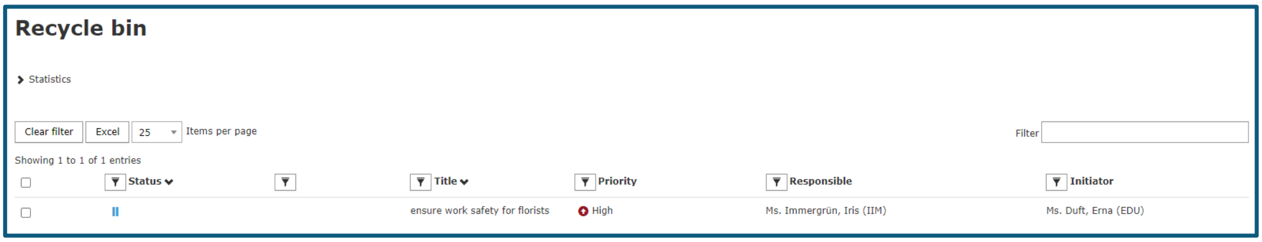
- Open the modal of the desired action by clicking on it.
- Click on the button **Restore**.
- Confirm the confirmation prompt.



The restored action can be found in the corresponding action program.

> **Caution:** If the associated action program has also been deleted, the action cannot be restored! It remains in the recycle bin until it is permanently removed from the system.

In the recycle bin, this is indicated by the entry „Deleted action program“ in the column **Action program**.

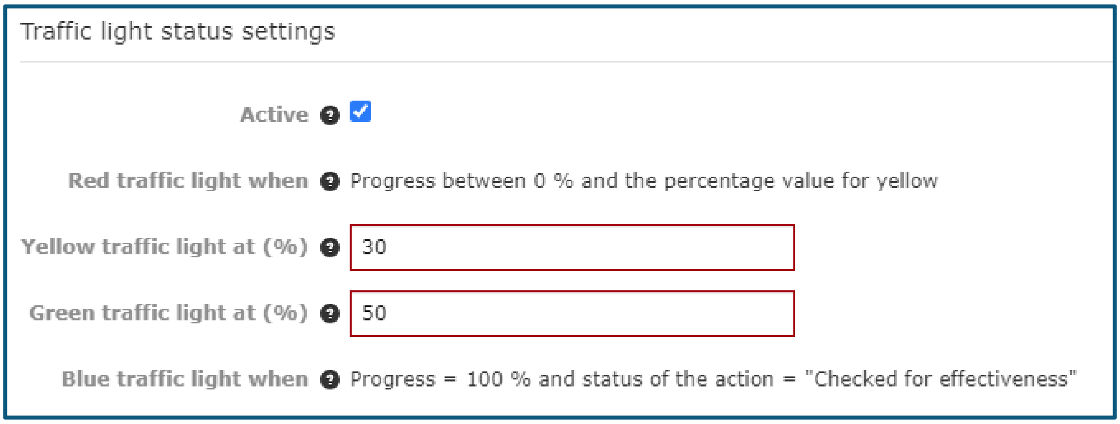


Settings for the traffic light

You have the option to display the traffic light in your action manager, but also to deactivate it if necessary. Check or uncheck the box for this purpose.

It is possible to set the percentage values for the colour change of the progress indicator from red to yellow and from yellow to green.

- To do this, set the desired values in the fields **Yellow traffic light** from (%) and Green traffic light from (%).



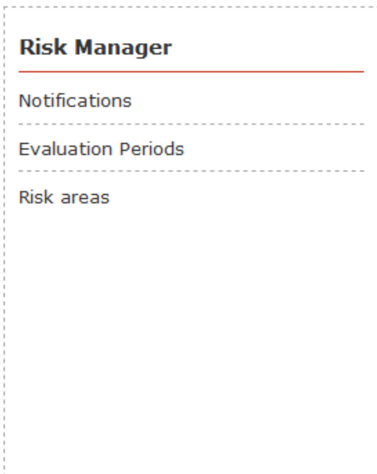
The values of the Red traffic light at and Blue traffic light at fields are fixed in the system and cannot be changed. The red traffic light is always displayed until the value for yellow has been reached. The blue traffic light is displayed as soon as the progress is at 100 % and the action has the status "Checked for effectiveness". If the end date is not defined in the action, the status display is greyed out.

The traffic light represents the progress deviation of an action. For this purpose, the target progress of an action, which is determined by the start and end dates, is set in relation to the actual progress (progress value entered in the action).

3.7 Risk Manager

In the box **Risk Manager**, you can make the settings that have an impact on the WissIntra NG Risk Manager:

- Notifications
- Evaluation Periods
- Risk areas



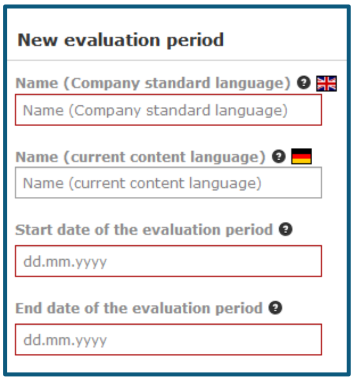
3.7.1 Notifications

When you click on **Notifications** the modal opens, which you already know from the Basic Settings described in chapter 3.1.1 Notifications. The tab **Risk** will be opened directly and you can enter WissIntra NG users, specific roles or external e-mail addresses to be informed about events regarding risks.

3.7.2 Evaluation Periods

Create new evaluation periods

- Click on New evaluation period .
- Complete the field **Name (Company standard language)**.
- Define the **Start date of the evaluation period** and the **End date of the evaluation period**.



Note: The evaluation periods have to be named in the Company standard language. However, if you have activated a different content language, you can optionally fill the field **Name (current content language)**. You can recognize the language by the flag on the right of the input field.

- Click on **Save** to create the evaluation period.

Edit evaluation periods

- Click on the respective evaluation period.
- You can then make the desired changes in the opening submodal.

Delete evaluation periods

- Move the mouse over the desired evaluation period and click on the recycle bin.
- Confirm the security query to delete the evaluation period.

Note: You can only delete evaluation periods if there are no more risks assigned to them. Please consider that evaluation periods are applicable across all locations.

3.7.3 Risk areas

Create risk areas

- Click on Create new risk area .
- Fill the field **Name (Company standard language)**.
- To create a new risk area at the top level, select „Without parent area" in the field **Parent risk area**. If you have already created risk areas, you can select the desired parent risk area here.

Note: The risk areas have to be named in the company standard language. If you have activated a different content language, you can optionally fill the field **Name (current content language)**. You can recognize the language by the flag on the right of the input field.

- Click on **Save** to create the risk area.

Note: You find the settings for the company standard language in the section **Languages – Master Language**.

Edit risk areas

- Click on the respective risk area.
- You can then make the desired changes in the opening submodal.

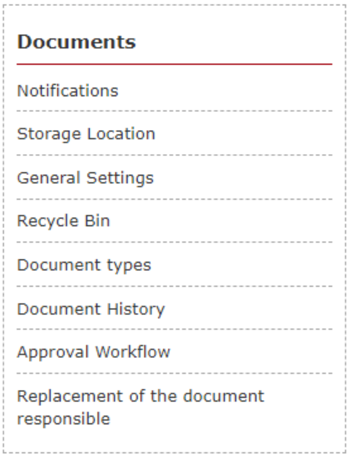
Delete risk areas

- Move the mouse over the desired risk area and click on the recycle bin.
- Confirm the security query to delete the risk area.

Note: Risk areas can be deleted at any time. If risks have already been created for an area, it is still displayed in the Risk Manager in the sidebar. However, you can no longer select the deleted risk area when creating a new risk.

Caution: If you delete a risk area, all risk areas created under it, are automatically deleted as well!

3.8 Documents



In the box **Documents**, you can make the settings that have an impact on the WissIntra NG Document Manager:

- Notifications
- Storage Location
- General settings
- Recycle Bin
- Document types
- Document History
- Approval Workflow

3.8.1 Notifications

When you click on **Notifications** the modal opens, which you already know from the Basic Settings described in chapter 3.1.1 Notifications. The tab **Documents** will be opened directly and you can enter WissIntra NG users, specific roles or external e-mail addresses to be informed about events regarding documents. Further settings can be made in the tab **Approval Manager**.

3.8.2 Storage Location and Logos

In the section **Storage Location** you can specify under which document path all documents stored in WissIntra NG should be saved.

You can use the button Path test to check whether the specified path is correct, which is confirmed by a success message.

WissIntra NG offers you the possibility to integrate your own logo in different places.

For this, the logos must be stored as .png files in a subfolder „\Images“ in the storage location described above. If the folder does not already exist, please create it.

Note: By default, the path is: „\ProgramData\WissIntraNG\Images“.

Note: If you do not place any logos in the specified folder, the WissIntra NG logo is displayed by default.

Attention: You should restart the IIS after every change of a logo. Otherwise, the cache settings may cause an incorrect display.

Logo in Reportings and PDFs

To include your logo in the header of the **Reportings** and the PDFs generated by the **Print** function, process as follows:

- Create your logo with the filename “ReportLogo.png”.
- Save this file to the folder “\Images”.

Note: The optimal ratio of your logo is 1:4.5. The logo itself is then scaled proportionally to the maximum size.

Logo in the e-mail notifications

You can also integrate your own logo into the e-mails sent by WissIntra NG.

Proceed as follows:

- Create your logo with the filename „MailLogo.png“.
- Save this file to the folder “\Images“.

Note: Please note that the logo in the header of the mails is scaled to 150 px width and the height will be proportionally increased or decreased.

3.8.3 General settings

In the section **Generals settings** you have the possibility to make settings for the document properties. At **Days before Expiration** you can define how many days before the expiration of the respective document a warning sign should appear.

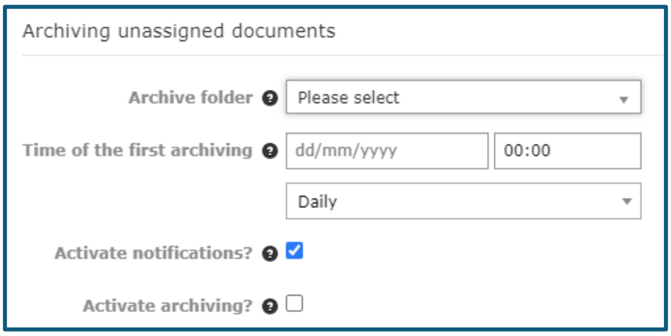
Note: You can see that a document will expire soon if the following warning sign appears in yellow: . If it is coloured red , the document has already expired.

Furthermore, you can use the slider to define the **Maximum Filesize**. You can set a maximum value of up to 1 TB for uploading files.

By clicking on Save & Close you save your changes.

Archiving unassigned documents

You can configure the archiving of **Unassigned documents**, that means that they will be moved to a folder you have defined.



- Specify the **Archive folder** into which the documents should be moved.
- Select a **Time of the first archiving**. The date is the start date for the archiving. The time remains the same for the following archivings.
- Decide whether the archiving should be carried out **Daily**, **Weekly** or **Monthly**.
- If you select the checkbox **Activate notifications?**, e-mails are sent according to the settings for notification on changes of documents.
- As soon as the checkbox **Activate archiving?** has been selected, the archiving begins at the time you have specified. As long as the checkbox is deselected, the settings are retained and no archiving is performed.

3.8.4 Recycle Bin

In the section **Recycle Bin** you will find all the documents, which were entered in WissIntra NG and then deleted, listed in a table. With the button Excel you can export this list.

Note: The recycle bin cannot be emptied. This is due to the obligation to preserve quality-relevant documents.

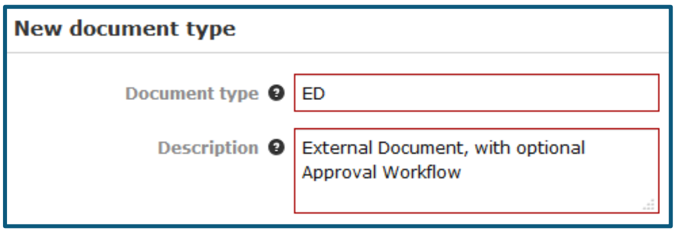
3.8.5 Document types

The section **Document types** gives you a tabular overview of the document types and allows you to change and extend them. The following document types already exist by default.

- Template Document (TD)
- Guideline(GU)
- External Document (ED)
- Legal Text (LT)
- Internal Guideline (IG)
- Miscellaneous (Misc)

Note: The listed document types are only suggestions. These can be modified, renamed or expanded. The only unchangeable document type is the Result Document.

- To change or to create a new document type, click the button New .
- Enter the name for the **Document type** and a **Description** in the appearing modal.
- Complete the creation by clicking on **Save & Close**.

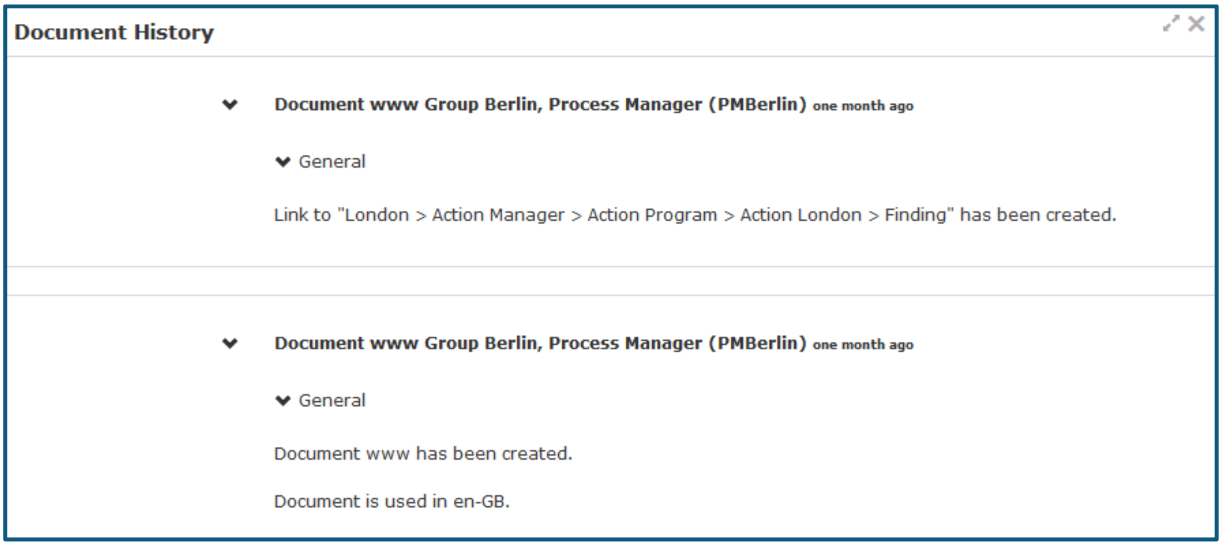


3.8.6 Document History

The section **Document History** gives you an overview of all document changes in WissIntra NG.

- You have the possibility to narrow down the shown entries by entering a date in the fields **From** and **Until**.
- Click on Show history to open the modal that shows all the changes for the selected period.

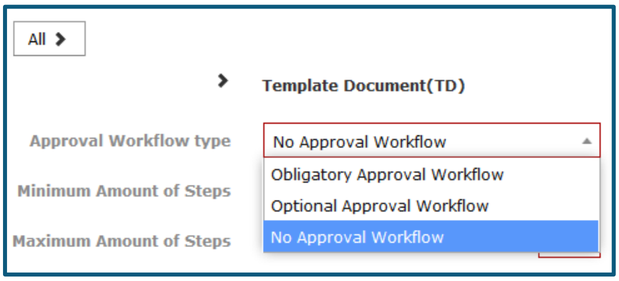
Note: Please consider that this Document History lists all the changes to all documents in the system. The evaluation and collection of documents can take a long time. But by setting a specific time frame you can shorten this loading time.



3.8.7 Approval Workflow

In the section **Approval Workflow** you can assign the document types to an approval workflow.

There are three options to choose. The selection can be done for every document type individually.



- **Obligatory Approval Workflow**
  Each document of the corresponding document type is subjected to an approval workflow. You can define the **Minimum** and **Maximum Amount of Steps** for the approval workflow. By clicking on › you see additional optional fields where you can already assign users to be the default **Approvers** in the respective steps. These can be changed later on.
- **Optional Approval Workflow**
  Here, the user who creates or edits a document of the corresponding document type can decide whether the document is subjected to an approval workflow or not. You can also set the **Minimum** and **Maximum Amount of Steps** as well as the default **Approvers**.
- **No Approval Workflow**
  With this option, all documents of the corresponding document type can be created and edited in WissIntra NG without any approval workflow. If you upload or change a document of this type it is immediately visible in the Document Manager.

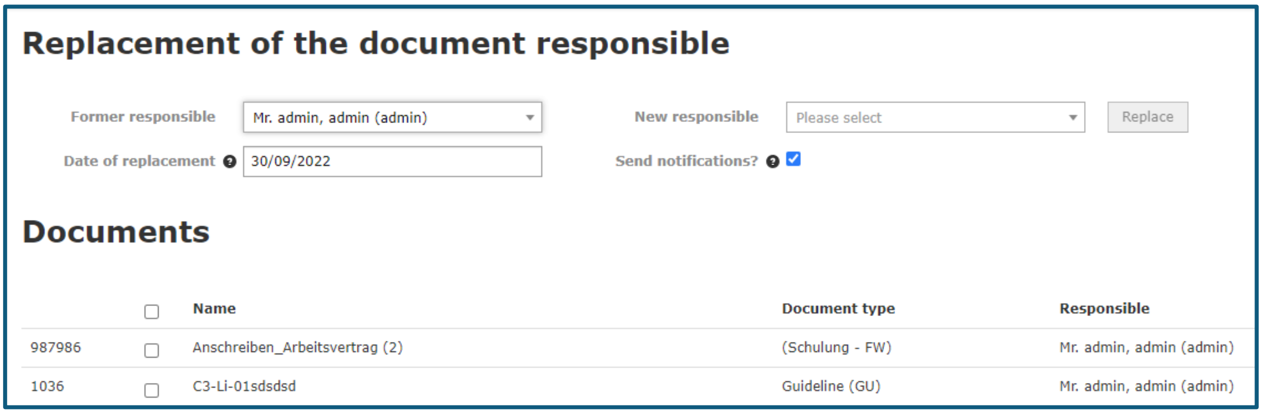
3.8.8 Replacement of the document responsible

If a user needs to be exchanged in several documents, WissIntra NG offers the possibility of bulk changes. Proceed as follows:

- Select the **Former responsible** and the **New responsible** in the drop-down fields.

You can also define a **Date of replacement** for the changes. This is useful when it is known in advance that an employee will not be active for a certain period of time, e.g. for parental leave.

Specify whether to **Send notifications?** for this change by selecting the checkbox. Consider that the number of e-mails sent here can be very high. E-mail notifications are only sent if they have been configured in advance. If not, no notifications are sent.



- Select the appropriate documents where you want to execute the replacement.
- Click on Replace to finish the replacement.

Note: If both users are already assigned to the process, the higher position is kept and the user to be replaced is removed from the process.

Note: In the case of checked out documents, the system tries to execute the changes later. If the selected user is no longer responsible for a process, no change is made.

3.8.9 Linking external documents

WissIntra NG allows you to link documents. It is recommended to use http or FTP links when using permalinks.

In addition, document links can be stored as paths to internal file servers. However, depending on the browser, different behaviour can occur when opening the document links.

Note: Document paths should preferably be http or ftp links. You could also use UNC paths. But when using network paths or local paths, there is a risk that users may not be able to access them.
The preferred paths should look as follows:
http://address
FTP://address
UNC: \\server_name\share_name\path
Drive: **\path**

- Google Chrome: the feature is not supported, and cannot be changed by modifying the security settings.
- Internet Explorer: Here, WissIntra NG must be added to the Trusted sites in the Internet Options.
- Firefox: Reload the tab with the opened document.

4 Further technical possibilities for WissIntra NG

WissIntra NG offers you further possibilities for the individual customization of the software.

4.1 Configuration of WissIntra NG with https (optional)

If you want to encrypt data transmission in your company, you can do this via https.

Caution: Please note that WissIntra NG is a pure Intranet application. To avoid possible security gaps, the software should not be provided over the Internet.

- Open the file web.config in the installation directory.
- If you want to configure https, the following entry must be created or the value within this entry must be set “true” under <appSettings>:

  <add key="WissIntra.UseSSL" value="true" />

- If you use a non-trusted certificate, the following option must also be set:

  <add key="WissIntra.AcceptUntrustedCertificates" value="true" />

- To be able to use cookies for WissIntra NG please create the following entry under <system.web>:

  <httpCookies httpOnlyCookies="true" requireSSL="true"/>

- Extend the entry

  <forms loginUrl="~/Account/Login" timeout="20" />

  as follows:

  <forms loginUrl="~/Account/Login" timeout="20" requireSSL="true" />

- Under <system.webServer> the following entry has to be added:

```
<rewrite>
  <rules>
    <rule name="HTTP to HTTPS redirect" stopProcessing="true">
      <match url="(.*)" />
      <conditions>
        <add input="{HTTPS}" pattern="off" ignoreCase="true" />
      </conditions>
      <action type="Redirect" url="https://{HTTP_HOST}/{R:1}" redirectType="Permanent"
/>
    </rule>
  </rules>
  <outboundRules>
    <rule name="Add Strict-Transport-Security when HTTPS" enabled="true">
      <match serverVariable="RESPONSE_Strict_Transport_Security" pattern=".*" />
      <conditions>
        <add input="{HTTPS}" pattern="on" ignoreCase="true" />
      </conditions>
      <action type="Rewrite" value="max-age=31536000" />
    </rule>
  </outboundRules>
</rewrite>
```

Note: By adding this entry, WissIntra NG can only be accessed via https. A subsequent changeover to http is only possible if the corresponding HSTS entry has been removed again on all clients that have used https. To enable this, IIS requires the URL Rewrite function.

Note: In addition, it is important to remember that the IIS has to be configured for an adaption in the web.config regarding the use of https. For this you need an SSL certificate. If the checkbox “SSL required” is selected in the SSL settings, WissIntra NG cannot forward from http to https.
We ask for your understanding that we cannot provide you with any advice regarding questions concerning the certificate, due to legal reasons.
For a description of how to configure IIS please follow this link:
http://www.iis.net/learn/manage/configuring-security/how-to-set-up-ssl-on-iis

4.2 Log in to WissIntra NG using a link

If desired, WissIntra NG allows you to log in directly to a previously defined page through a link. For example, the user can directly access a process or a document folder.

As a prerequisite the link has to have the following structure:

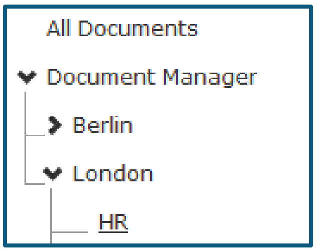
http://<servername>/<Application Name>/Account/LoginWithRedirect?
Username=<User Name>&Password=<Password>&RememberMe=<true/false>&
returnUrl=<LandingPage>

The URL of the landing page must be as follows:

/<Application Name>/<Location ID>/<Language>/<Controller Name>/<Page name + further parameters>

To clarify this, we will illustrate the generation of the link with an example.

The user „Smith“ with the password „P4s5w0rd“ should be automatically logged in and directed to the folder „Document Manager – London – HR“.



- Navigate to the desired location in WissIntra NG.

- Copy the URL displayed in the browser twice in a text editor.

```
http://servername/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14059
http://servername/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14059
```

- In both lines, delete the grey and crossed part so that only the underlined parts remain.

```
http://servername/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14086
http://servername/WissIntraNG/1/de-DE/de-DE/Document/Document#tableparam=14086
```

Result:

```
http://servername/WissIntraNG/
/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14059
```

- In the first line, add the following text:

Account/LoginWithRedirect?Username=<**User Name**>&Password=<**Password**>&RememberMe=<**true/false**>&returnUrl=

```
http://servername/WissIntraNG/Account/LoginWithRedirect?Username=<User Name>&Password=<Password>&RememberMe=<true/false>&returnUrl=
/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14059
```

- Replace the placeholders „<…>“:
  <**User Name**>: User name that should be used for the log in. Here: **Smith**
  <**Passwore**>: The password of the user. Here: **P4s5w0rd**
  <**true/false**>: Here you can decide whether the checkbox “Remember me” should be

activated or not. Enter either true for active or false for inactive.
Here: **true**

> **Note:** Replace the placeholders including < and >.

```
http://servername/WissIntraNG/Account/LoginWithRedirect?Username=Smith&Password=P4s5w0rd&RememberMe=true&returnUrl=
/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14059
```

- Add the second line to the first line.

You will receive the following link, which you can access directly in your browser.

http://servername/WissIntraNG/Account/LoginWithRedirect?Username=**Smith**&Password=**P4s5w0rd**&RememberMe=**true**&returnUrl=/WissIntraNG/1/en-GB/en-GB/Document/Document#tableparam=14059

> **Note:** Please note that the link corresponds to the form described above. If the link was built in the wrong way, you will get error messages or redirects.

> **Note:** Note that the user specified in the link also has the appropriate permissions for the location and landing page.

4.3 Error handling: Windows login window appears when opening documents

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.

This behaviour can be bypassed by adjusting a variable in the web.config file. This ensures that the documents are not opened in the Internet Explorer, but downloaded.

- Open the file web.config in the installation directory.
- Under the node <appSettings> you will find the line

<add key= "WissIntra.ForceDownload" value= "" />

- Add the file extensions that should be downloaded and opened in your Document Manager. Separate the entries with semicolon.
- For example:

<add key= "WissIntra.ForceDownload" value= "docx; doc; xlsx; xls" />

5 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)

6 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:

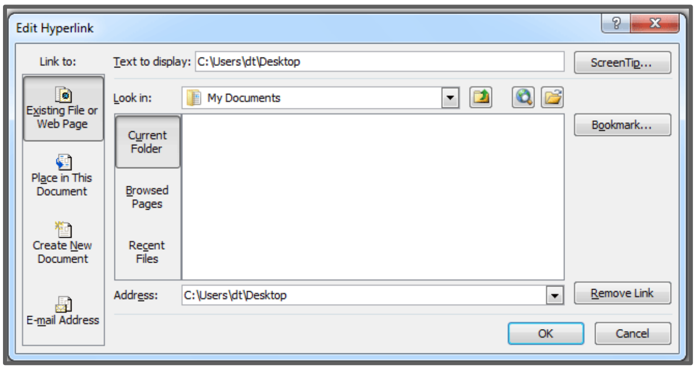
- Use CTRL + C to copy the address of the hyperlink and insert it into the Office document.
- Press **Enter** to automatically generate a link.

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.

7 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.

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