WissIntra NG

User Manual

Document Manager

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

Arne Klein, Head of Software Engineering

User Manual Document Manager WissIntra® NG

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

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

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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

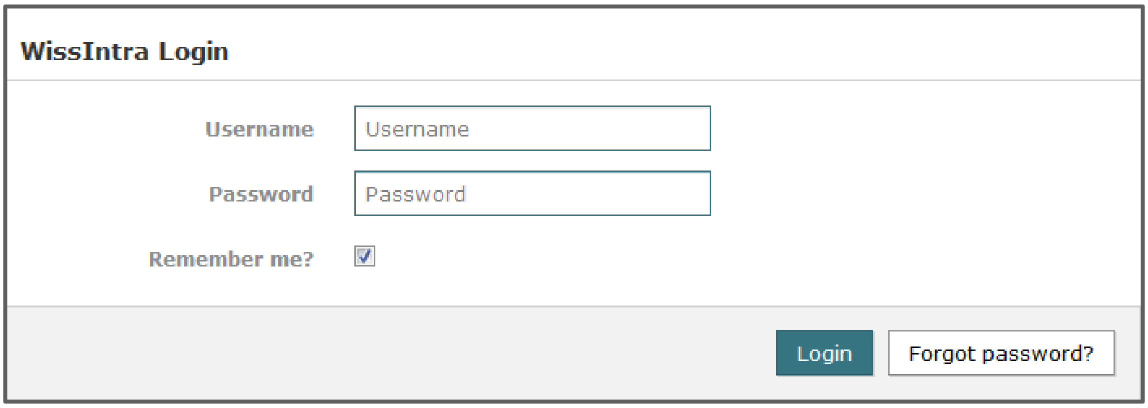
This chapter provides information about the following topics:

- 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**.

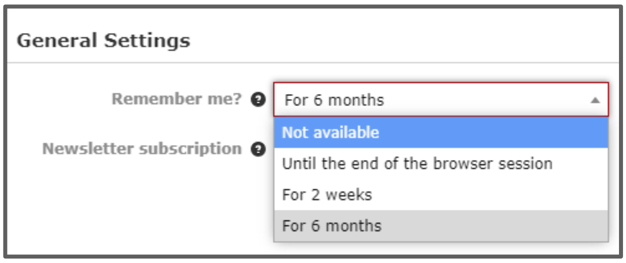
Note: If your user was created via the LDAP interface, please us your Windows password.

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

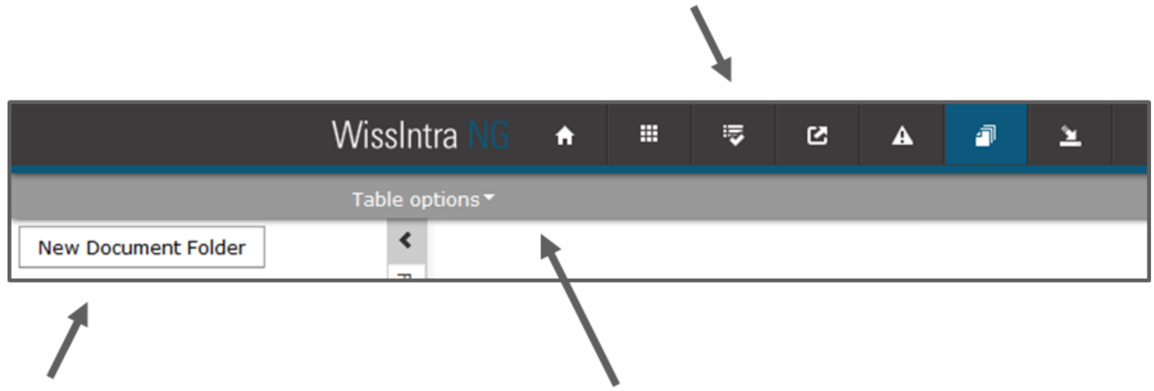
WissIntra NG has a new, consistent and user-friendly operating concept, which also allows inexperienced users to work quickly and securely with the software.

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.

Navigation bar



Sidebar navigation Module navigation

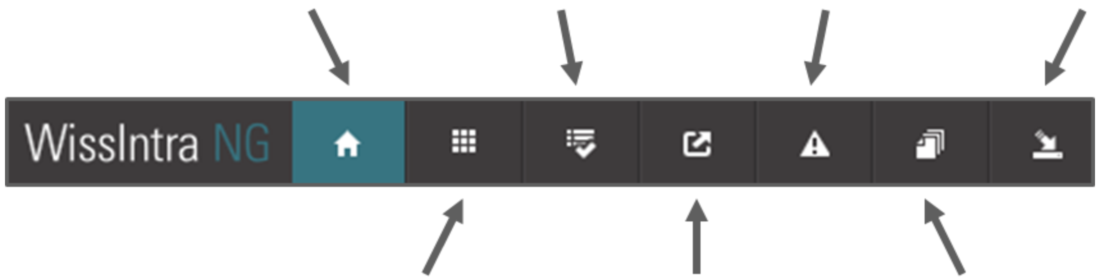
Modules

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.

Cockpit Audit Manager Risk Manager Approval Manager

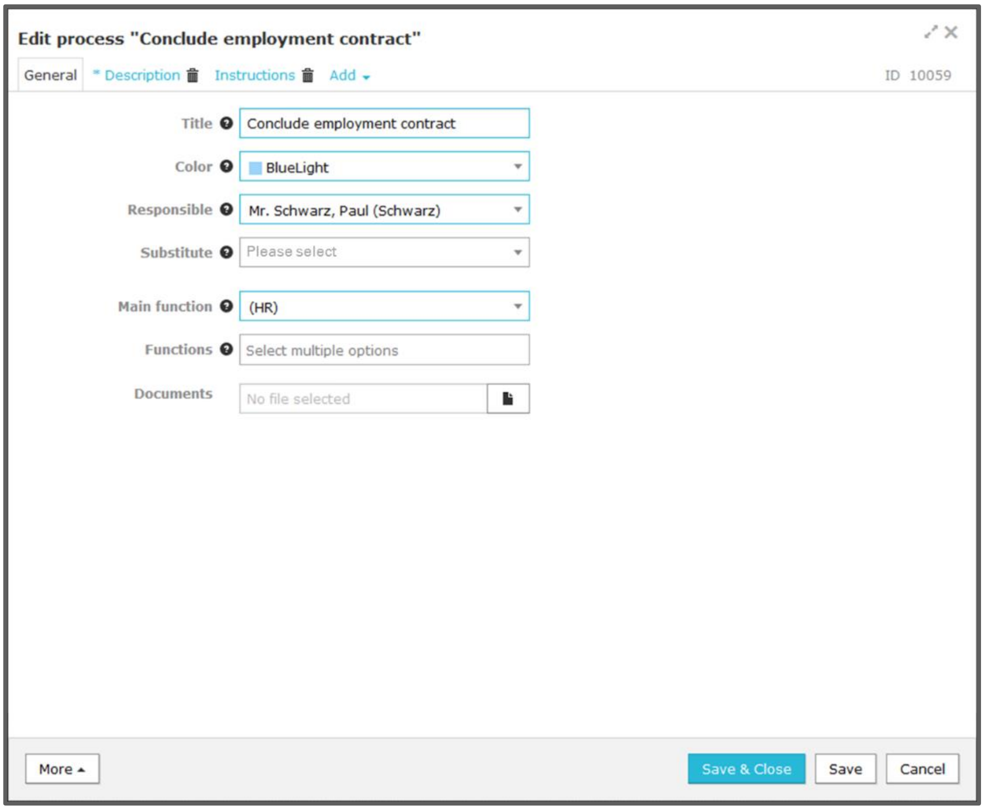


Process Manager Action Manager Document Manager

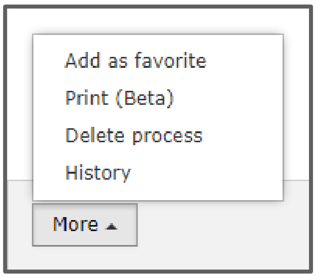
By clicking the respective symbol, the corresponding module opens. You can also click on the name of the module in the drop-down that appears on mouse-over.

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.

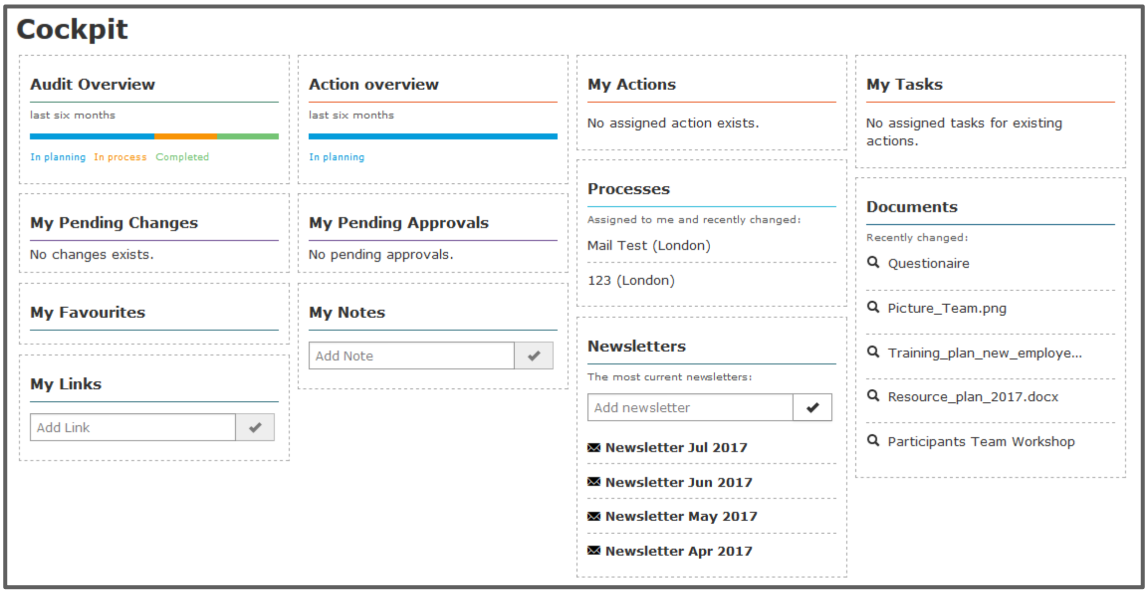


Most modals have the button More ▲ at the bottom left. Here you can find additional functions that you can use in the current context.

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 to manage changesets that need to be approved.
	Profile settings	Use this icon to access your user profile. There you can set your password, the colour theme, the default folder and default location. You can also see your assigned roles and functions.
	Language	This icon will take you to the selection where of the interface and content language. This is only possible if other languages have been purchased.
	Location	Use this icon to select the location within the drop-down menu. This is only possible if your system has different locations.
	Help	This icon gives you access to the WissIntra NG manuals and information about the program version and Release Notes.
Search	**Search**	Using the search mask, you can search for terms in all modules.

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

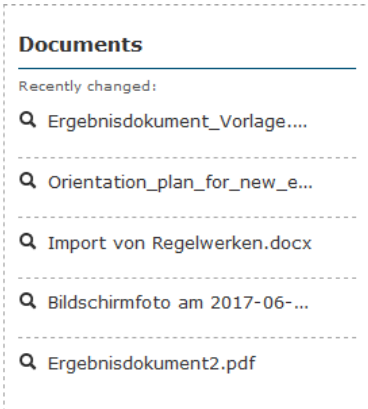
2.3.1 Cockpit boxes

Processes

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

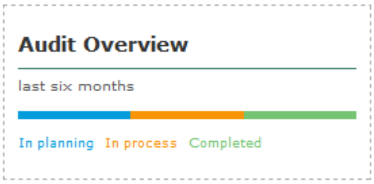
Documents

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



Audit Overview

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



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

Action Overview

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

WissIntra NG differentiates the following statuses:

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

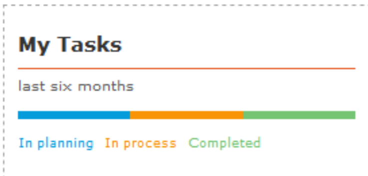
My Actions

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

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

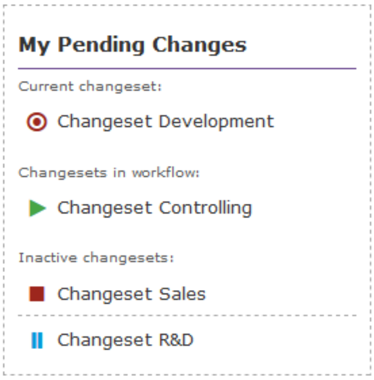
My Tasks

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



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

My Pending Changes



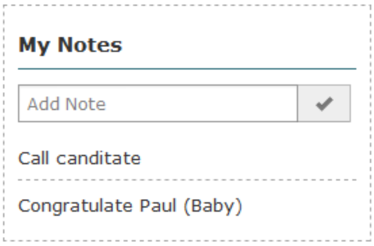
The Box **My Pending Changes** shows all of the user's changesets, divided in:

- Current changeset
- Changeset in workflow
- Inactive changeset

My Pending Approvals

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

My Notes



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

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

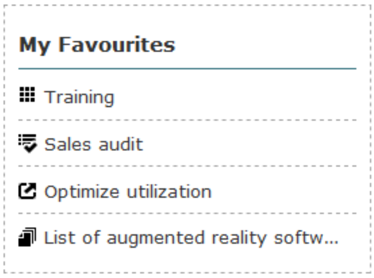
My Links

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

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

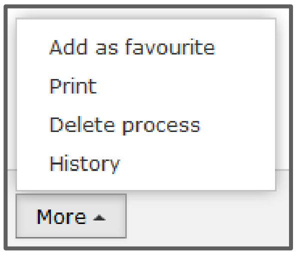
My Favourites

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



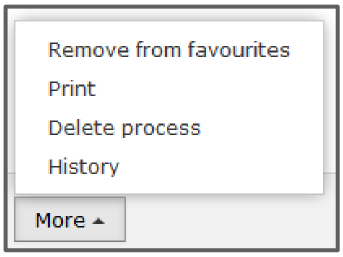
Add as favourite

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



Remove from favourites

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



Newsletters

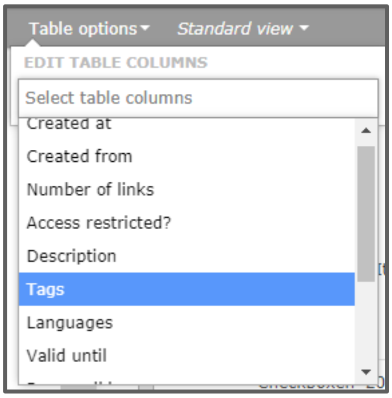
In the box **Newsletters**, company-wide information such as newsletters can be added. This box, if filled, is visible to all WissIntra NG users and is managed by the administrators. The maximum number of entries displayed is limited to five.

2.4 Table options, filters and views

Table options

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

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



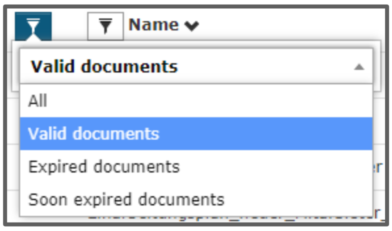
On the right you see the example of the selection for the table columns in the Document Manager.

Filter

Each column in a table view can be filtered.

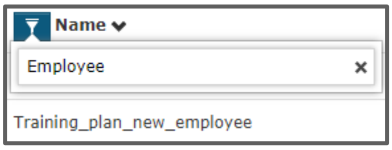
Columns with fixed values:

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

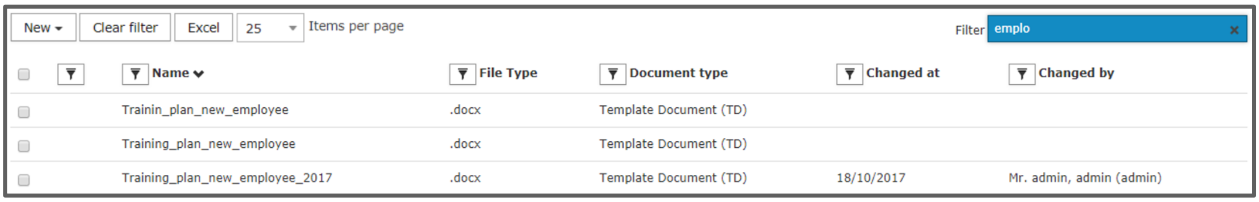


Columns with free content:

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



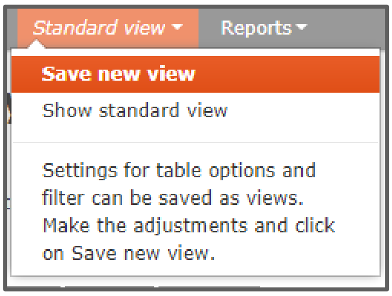
You can also filter across all columns using the general free text field on the right above the table.



Views

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

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



Show standard view

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

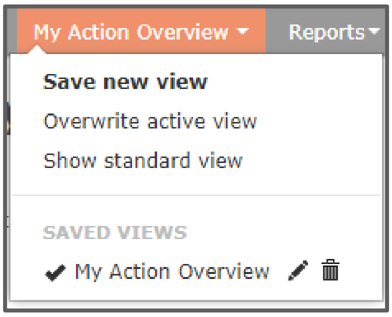
Save new view

You can also save your own views for similar tables.

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

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

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



Overwrite active view

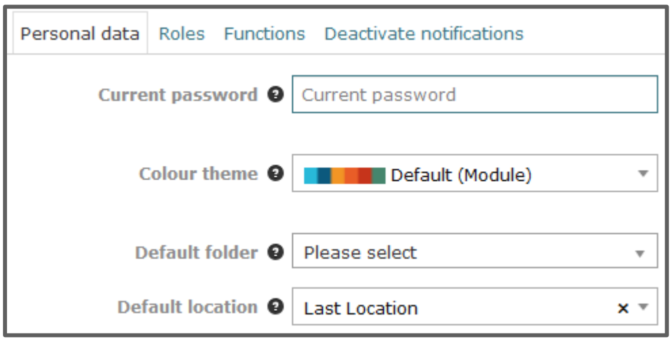
If you want to change a view that has already been saved, you can overwrite the view.

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

2.5 Profile settings

Use the icon to access the profile settings.

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



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

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

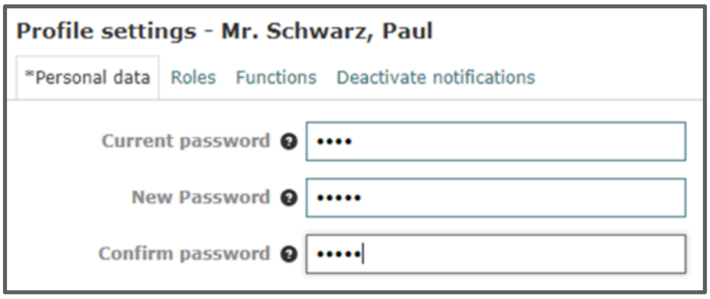
In the tabs **Roles** and **Functions**, the user can see which roles or functions are assigned to him within the respective locations.

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

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

Change password

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

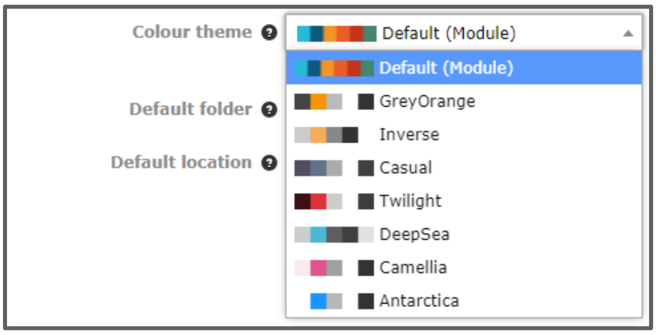


Note: This does not apply to LDAP users since they use the Windows password to login. This also does not apply to group users, since this password is always assigned by the administrator.

Set the colour theme

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

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

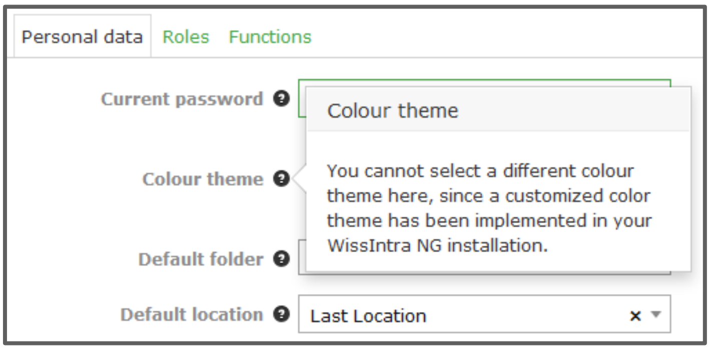


Note: The **Default (Module)** is selected from the beginning. Here each module has its own colour.

Customizing the WissIntra NG user interface

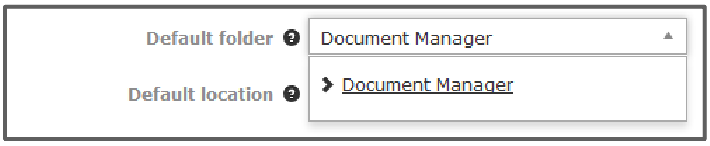
We offer you the possibility to customize the WissIntra NG user interface according to your wishes. You can find the information in the corresponding PDF in our Customer Centre.

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



Select Default folder

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



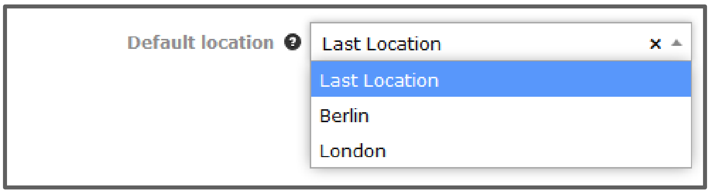
- Open the drop-down menu and navigate with to the desired folder.
- **Save** your selection.

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

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

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

Select the default location

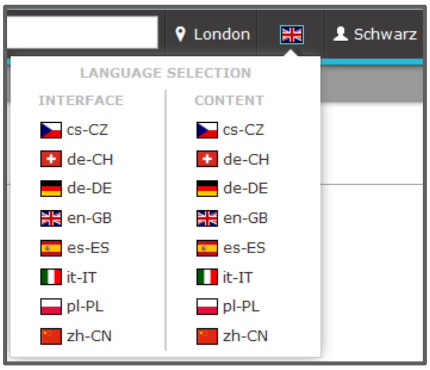


If you are able to access multiple locations in your system, you have the option to select a default location that will be opened each time you log in. Alternatively, you can choose that WissIntra NG always opens the location that was used at last.

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

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

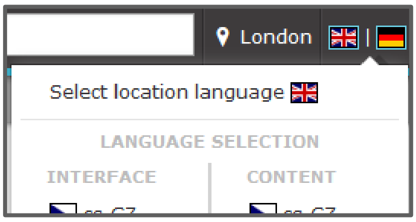
2.6 Language



Use the flag icon  to access the language selection.

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

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



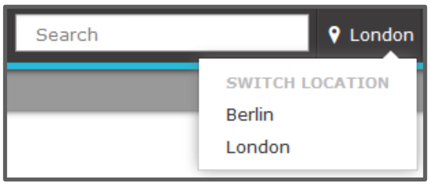
As soon as you have made such a selection, the option **Select location language** is displayed. This option changes both, interface and content to the language assigned to the specific location.

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

2.7 Location

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

- Click on the desired location.



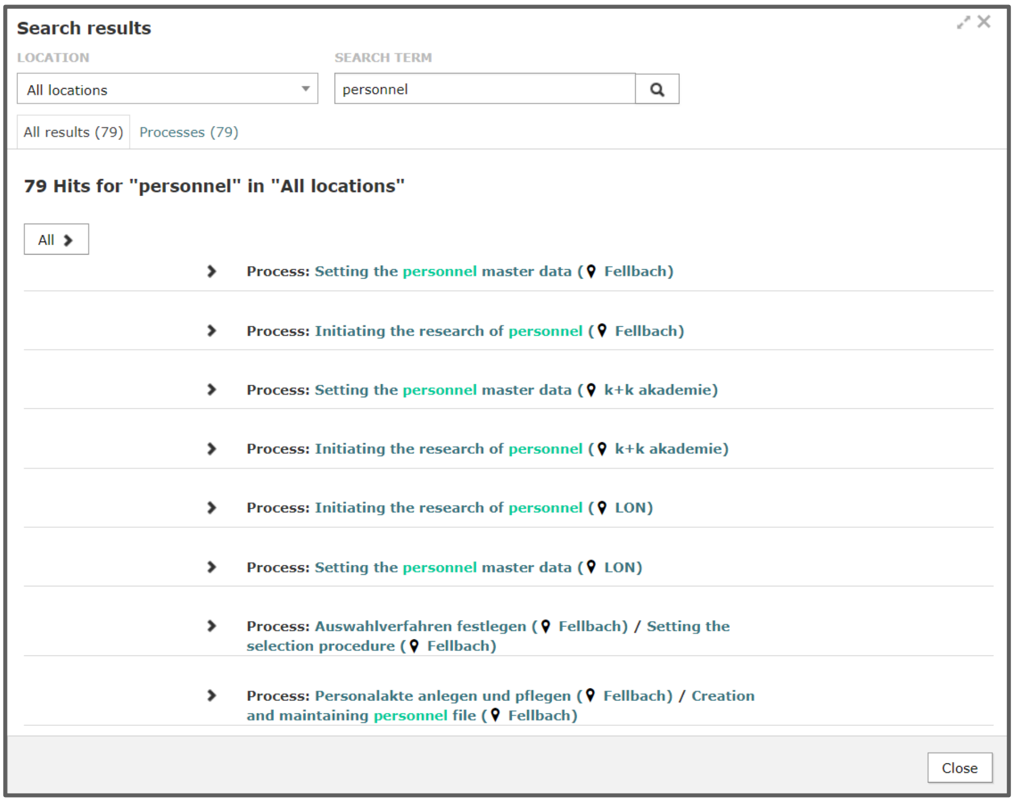
Note: Changing location is only available if you have several locations. This depends on your purchased licence. The administrator sets the parameters for the location.

2.8 Search

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

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

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



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

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

1. Wildcard search

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

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

2. Fuzzy search

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

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

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

3. Booster search

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

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

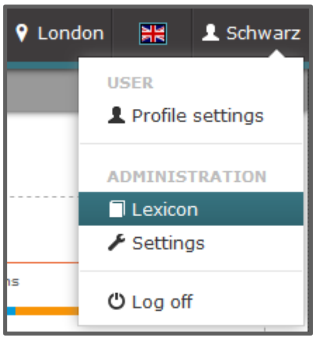
- For example, you search for "satisfied customer" and you want to increase the relevance of the term "satisfied", you can boost it with the "^" symbol and a boost factor, e.g. "satisfied^4". Thus, "satisfied" is 4 times more relevant for the search than "customer". The boost factor has to be always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

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

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

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

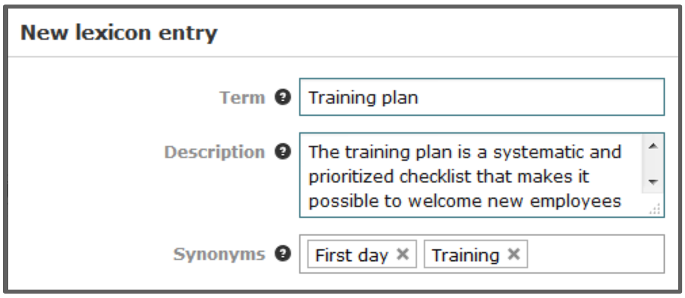
2.9 Lexicon



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

There are two ways of creating a lexicon term:

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



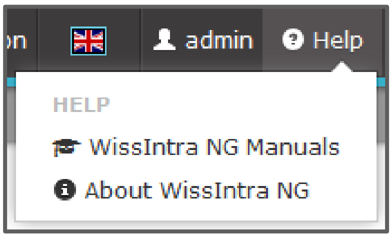
Alternatively, a lexicon entry can be made directly via each free text field:

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

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

2.10 Help

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

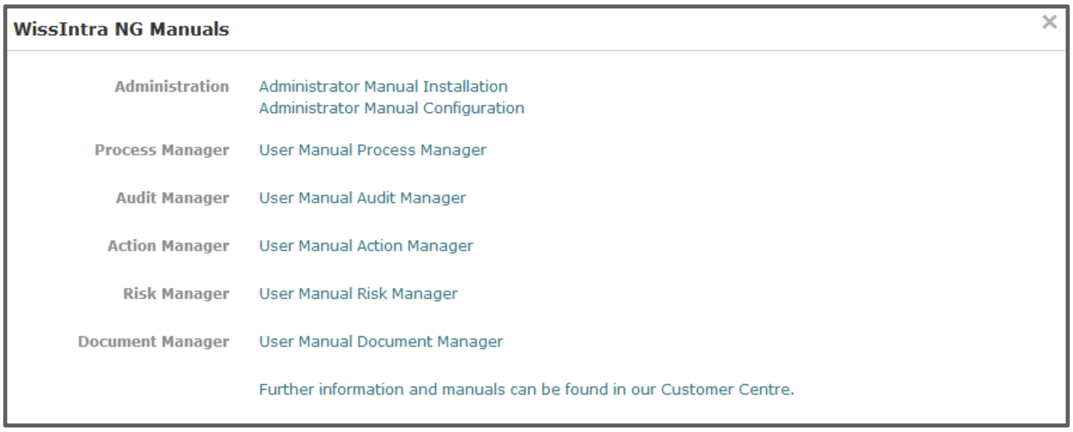


WissIntra NG Manuals

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

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

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

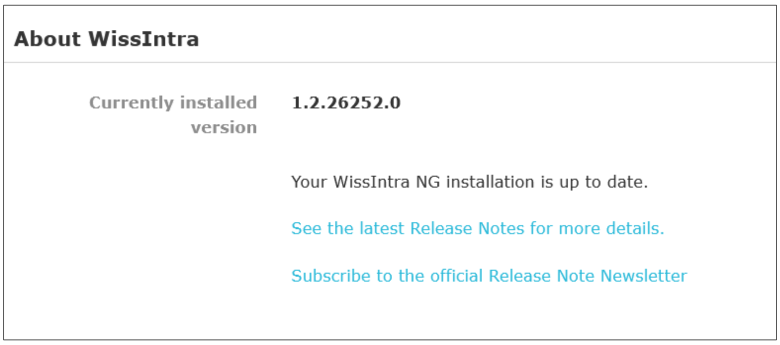


About WissIntra NG

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

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

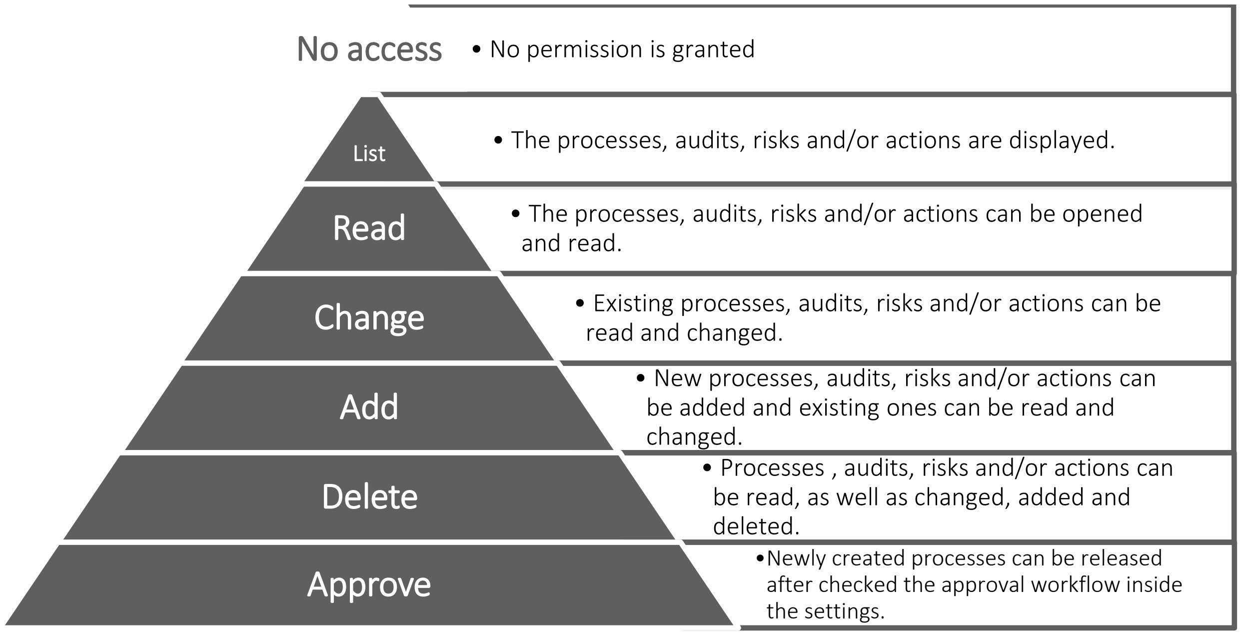
In addition, a link will take you directly to the current Release Notes. If your administrator activated **Newsletter Subscription** option in User Settings, a link will show enabling you to subscribe to the official Release Notes Newsletter.



Note: If you cannot see the link enabling subscription to the official release notes newsletter, please contact your administrator.

2.11 Permission concept

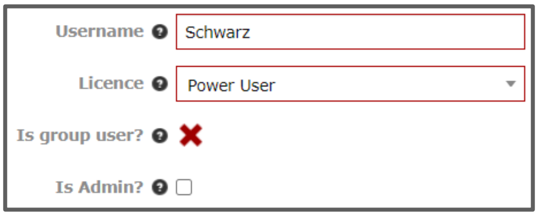
Access to WissIntra is given via permissions. There are six independent module permissions. The pyramid describes the increasing permissions from top to bottom:



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

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

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



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

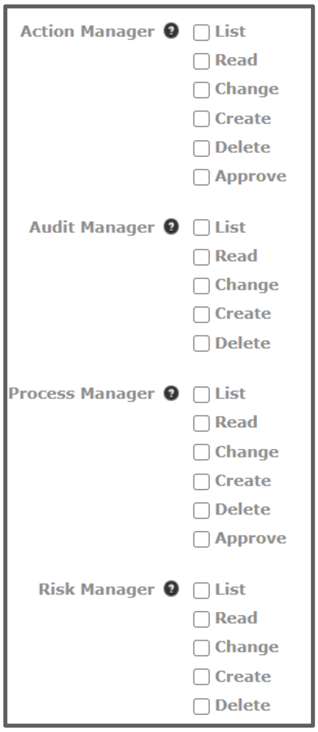
The following graphic gives an overview of the possible accesses:

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

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

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

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



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

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

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

Note: The permissions are granted by the administrator.

You can see two examples here for clarification:

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

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

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

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

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

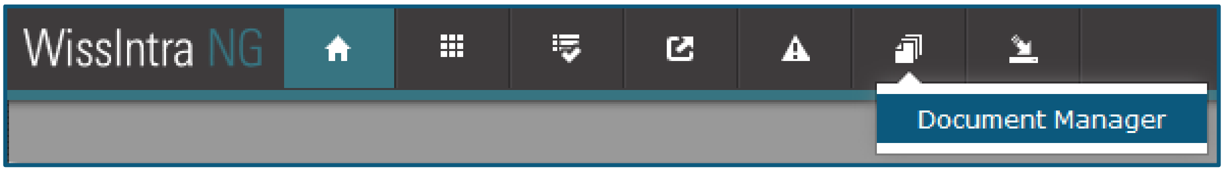
3 Short introduction Document Manager

In this chapter, you will find in brief:

- How to start the Document Manager
- How the Document Manager works in WissIntra NG
- Structure of the Document Manager
- What the approval workflow is used for
- Important information about the permission concept for documents
- What settings are available for administrators

3.1 How to start the Document Manager

- Click on the Document Manager icon in the menu bar, or click on the drop-down with the module name which appears on mouse-over to start the Document Manager.



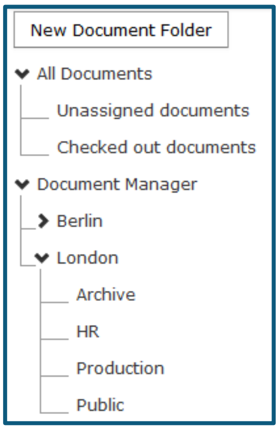
3.2 How the Document Manager works

With the WissIntra NG Document Manager you have the possibility to structure the documents used in your company. The different types of documents can be attached to the associated processes, actions or audits to ensure a clear management of data.

Structured and clear, the WissIntra NG Document Manager at a glance:

- Simple and clear presentation of documents
- Assignment of permissions for documents and document folders
- Document history and document versioning
- Usable for certifications and audits
- Execution of an approval workflow for documents

3.3 Structure of the Document Manager



In the sidebar on the left, documents can be sorted and managed by using a folder structure. This ensures a simple overview.

By clicking on the name of a folder, the documents of this folder are shown in the table on the right.

When you click on a document, the detail view opens. Now you can download the document by clicking on the document link. Depending on your browser settings, the document is opened directly in another tab or is shown as a download in your browser and you have to click on it again.

The entry **All Documents** in the sidebar lists all documents stored in WissIntra NG for which you have the appropriate permission.

By clicking on **Unassigned documents**, you can see all documents in WissIntra NG that you have access to and that are not assigned to a process, a task or other objects.

In the view **Checked out documents** you can see all documents visible to you that have been checked out by any WissIntra NG user.

3.4 Why using the approval workflow

Among your documents, you may have some types of documents that have to be validated by specific persons before they can be published. With the Approval Manager you can exactly define, which types of documents should be subjected to an approval workflow.

3.5 Permission concept for documents

The WissIntra NG Document Manager offers you different permission options for document folders and documents.

The assignment of the permissions is made via the roles stored in WissIntra NG, which can be assigned to the folders and documents with the permissions List, Read, Change, Create, Delete and/or Authorize.

You can find further information in chapter **Document permissions**.

3.6 Settings for the Document Manager

Notifications

You can get notified by WissIntra NG per e-mail for the following events:

- Creation of a document
- Change of a document
- Deletion of a document
- Prior to Expiration (you can select between 0-100 days)
- At expiration of the validation date
- After expiration of the validation date (you can select between 0-100 days)

The notifications can be sent to the creator of the document, the document responsible or the substitutional document responsible, as well as single users or external e-mail addresses.

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

Storage Locations

Here you find the document path where all WissIntra NG documents are saved.

General Settings

Here you can define how many days before the expiration a warning sign is shown for the document. 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.
You can set select the maximum file size for uploads and make the settings for archiving unassigned documents.

Recycle Bin

In the Recycle Bin you see all deleted documents. You can restore them from there.

Document types

Here you find all document types.

Document History

You can display the history of all documents for a specific period.

Approval Workflow

For every document type, you can define here if it is subjected to no approval workflow, to an optional or to an obligatory approval workflow.

4 Documents

The Document Manager allows organizing and managing all documents in WissIntra NG.

4.1 Document types

In WissIntra NG documents are divided into different categories. The following document types are already provided per default:

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

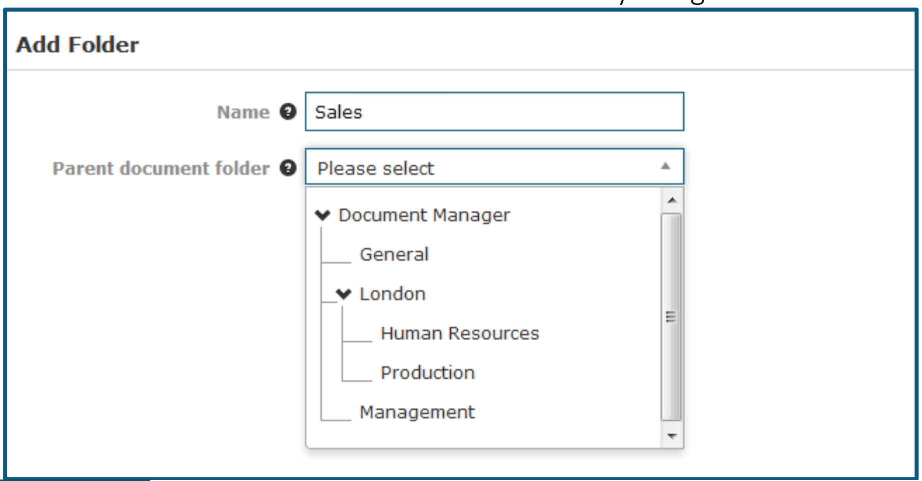
Note: The document types listed above are only suggestions. Your administrator can modify, delete or add document types. The only type that cannot be changed is the Result Document.

The Result Document is a special kind of document type. It is attached or uploaded as a result of a process in the according process card within the tab **Result document**. This category cannot be deleted by the administrator.

4.2 Create Folders

Before you upload your documents in WissIntra NG, you should create a folder structure suitable for your company requirements.

- Click on New Document Folder in the sidebar
- Define a **Name** and select the **Parent document folder** by using the arrow for navigation.

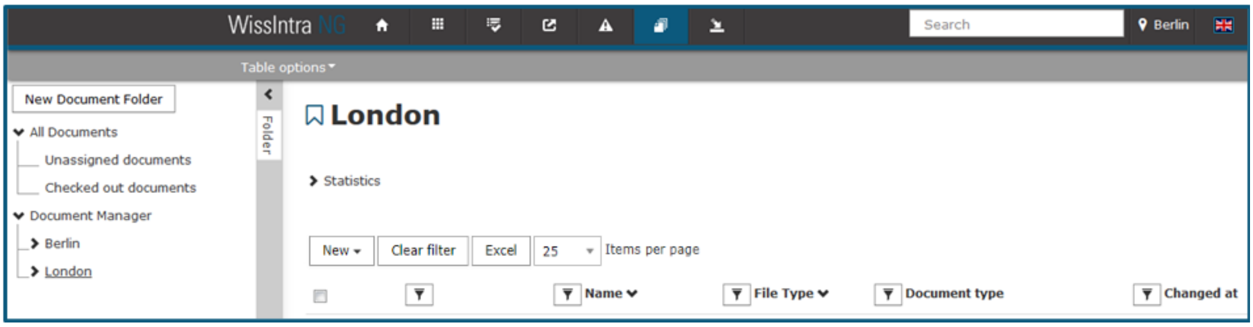


- Click on Save & Close to create the new document folder.
- To set permissions for the document folder, hit the More button and go to permissions.
- To edit the name or the parent document folder, click on the magnifying glass in front of the folder name in the sidebar.

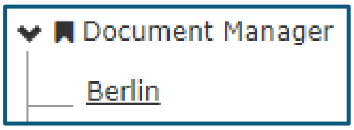
Set default folder

In addition to the option in the Profile settings, you can also specify a folder as your default folder directly in the Document Manger itself. This standard folder is opened automatically when the Document Manager is started and when documents are selected or uploaded.

Set the default folder from table view



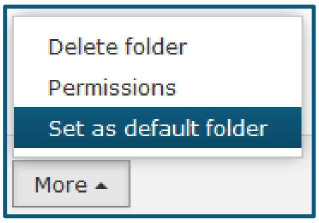
The current default folder is marked with a filled bookmark .



- In the table view, click the empty bookmark next to the folder title in the appropriate folder to set it as your new default folder.
- Confirm the confirmation prompt.

Set default folder from folder details

- Open the detail view of a folder with the magnifying glass .
- Navigate to More and select **Set as default folder**.
- Confirm the confirmation prompt.



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.

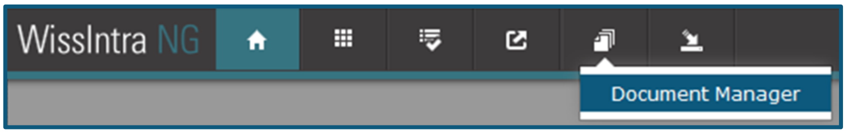
4.3 Create documents

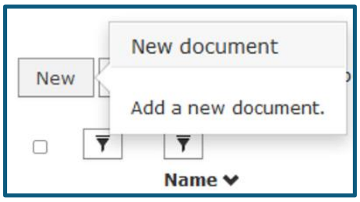
Documents can be created in the Document Manager itself as well as in the other modules. If documents are uploaded in the Document Manager, they can later be attached to the desired object.

To upload a document in the Document Manager, proceed as follows:

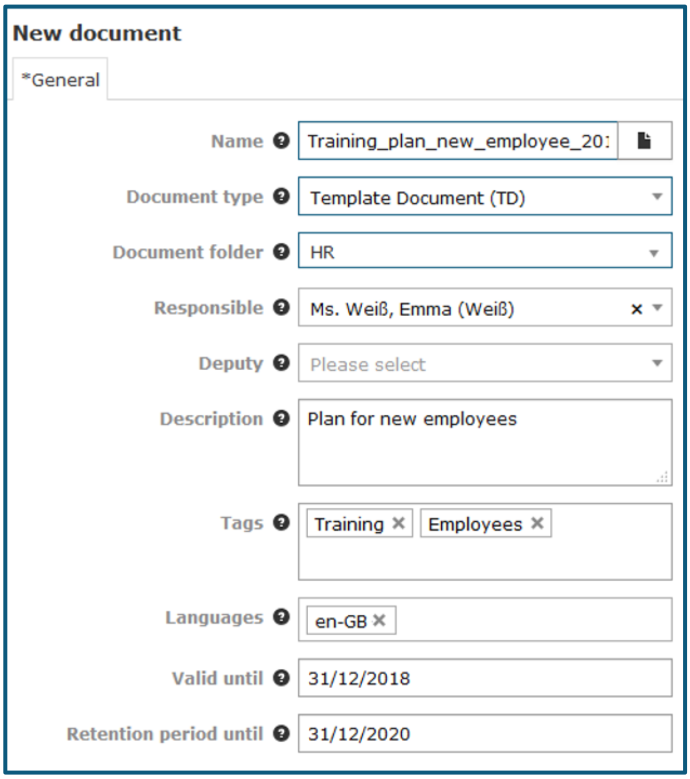
- Click on the Document Manager icon in the menu bar or the drop-down with the module name that opens on mouse-over.

The Document Manager starts and displays the **Document Manager** root folder.





- Click on the button New .
- Select the desired document via .
- The **Name** of the selected document appears in the first field. You can change it here.
- In the field **Document Type** you have to select the appropriate option from the drop-down menu.
- Select the storage location in the field **Document Folder**. To do this, open the drop-down menu and navigate via .
- In the field **Responsible** you can select a user who is responsible for this document. As soon as a responsible was selected, the field **Substitute** appears.
- In the **Description** you can make a short classification of the document.
- In the field **Tags** you can assign keywords to the document. With these you can find the document more easily by using a filter.
- The **Language** is an optional field that can facilitate filtering. It is also useful to specify the language of the document when documents are created in several languages.
- An expiration date for the document can be entered under **Valid until**. You will recognize by a yellow warning sign that the document will soon expire. If the warning sign is red the document has already expired. In addition, you will find the expiring date here.
- In the field **Retention period until**, you can specify the date up to which the uploaded document has to be retained.
- Click on Save & Close to upload the document in WissIntra NG.

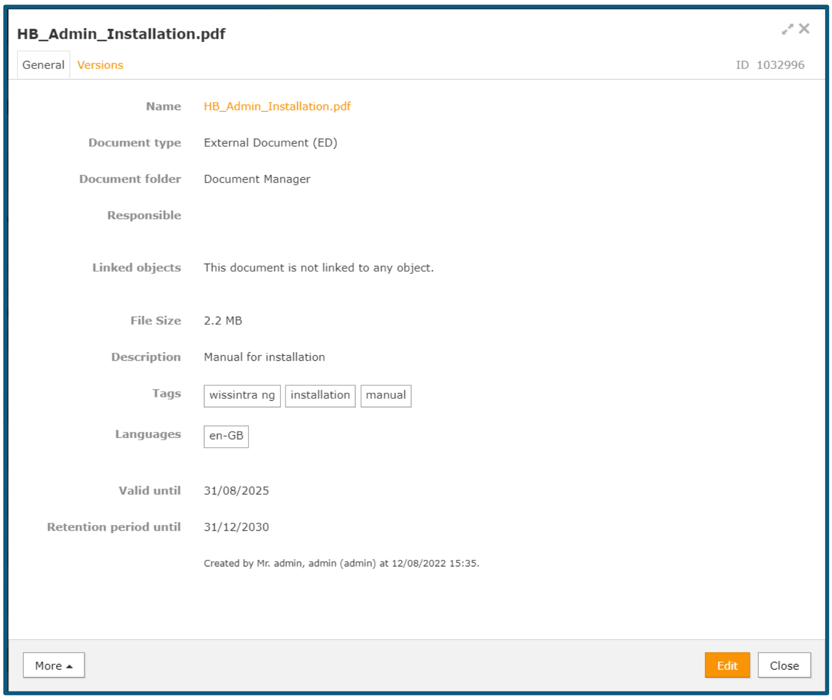


4.4 Edit documents

Edit document details

If you want to edit a document that has been stored in WissIntra NG, click on it in the Document Manager table. The following modal opens with all the information about the document.

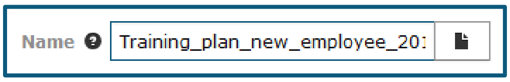
In the fields **Linked processes**, **Linked actions**, etc. , you can see whether the document is linked to any objects. Clicking on one of these entries will lead you directly to the linked object.



- Click on the button Edit to change any document detail information.
- Click on Save & Close to save your changes.

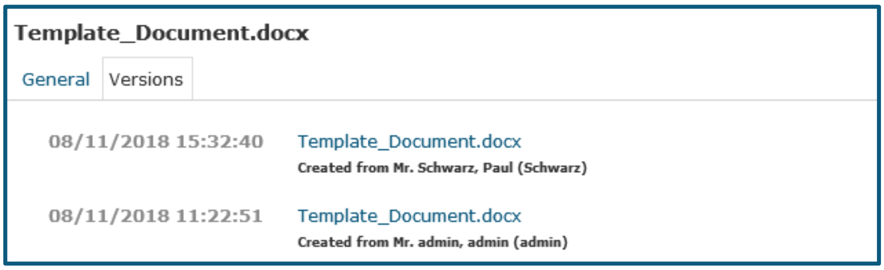
Document versions

To create a new version of a document you can simply do this by uploading a new document.



- Open the document in the detail view and switch to **Edit** mode.
- Click on and select the desired document.
- Click on Save & Close to upload the new version.

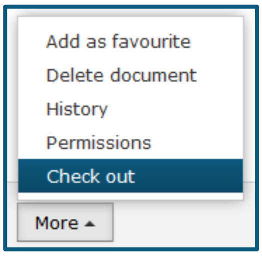
In the tab **Versions** you can see the original version and the new version of the document. With the appropriate permissions you can also download both versions.



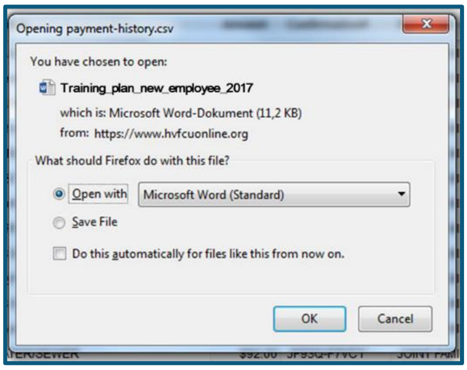
Note: This way of versioning is only recommendable if you are sure that no other user is changing the document at the same time.

Check out a document

When several users have the permission to work on the same document, it may be useful to use the **Check out** and **Check in** option for editing the document itself. This prevents other users from changing the document while you work on it.

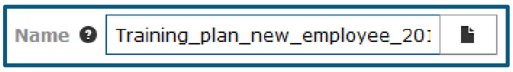


- Open the document in the detail view and switch to **Edit** mode.
- Then click on More and select **Check out** in the drop-down.
- A new tab will open in your browser and the document will be downloaded.
- Now you can open and edit the document in the corresponding application (e.g. Word or Excel)
- Save the changes made in the document.



Note: If a document is checked out by a user, other users can only download the original version. Only after the edited version of the document is checked in again, it can be edited or checked out by others.

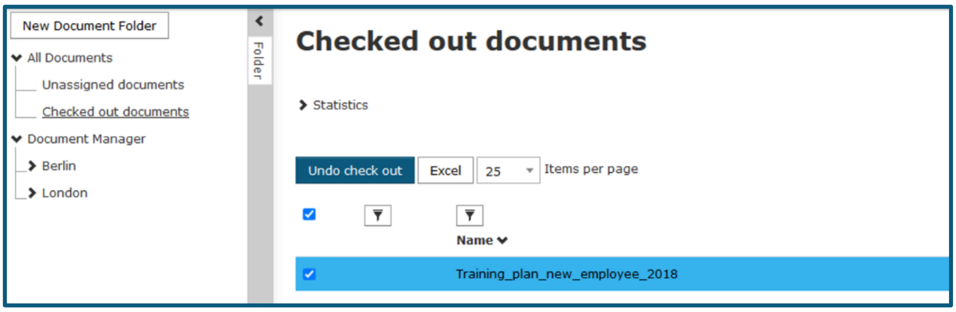
Check in a document



- Go back to the modal, switch to **Edit** mode and click on the upload icon to upload the new version of the document in WissIntra NG.
- Finish the process by clicking on Check in. Now the document is checked in as a new version in WissIntra NG.
- In the tab **Versions,** you find an overview of all previous versions of the document.

Handle checked out documents

If a user has not checked in a document after editing, the administrator or users with the corresponding permissions have the possibility to reset the document for the other users. In the view **Checked out documents** you can see all document that have been checked out by any WissIntra NG user according to your permissions.



- Select the checkbox in front of the appropriate document.
- Click on Undo check out and confirm the prompt.

Now you have reset the old document for editing.

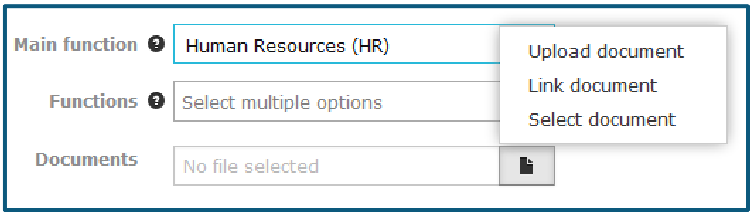
Note: If you undo the check out, you discard any changes in a document that a user might have done after the last check out.

Note: As a user, you need all permissions (including “permit”) to check in a checked out document again.

4.5 Attach documents

WissIntra NG offers three ways to attach documents to various objects in all modules.

- Open the desired object and switch to Edit mode.
- In the field Documents, click on the icon and choose the preferred option.

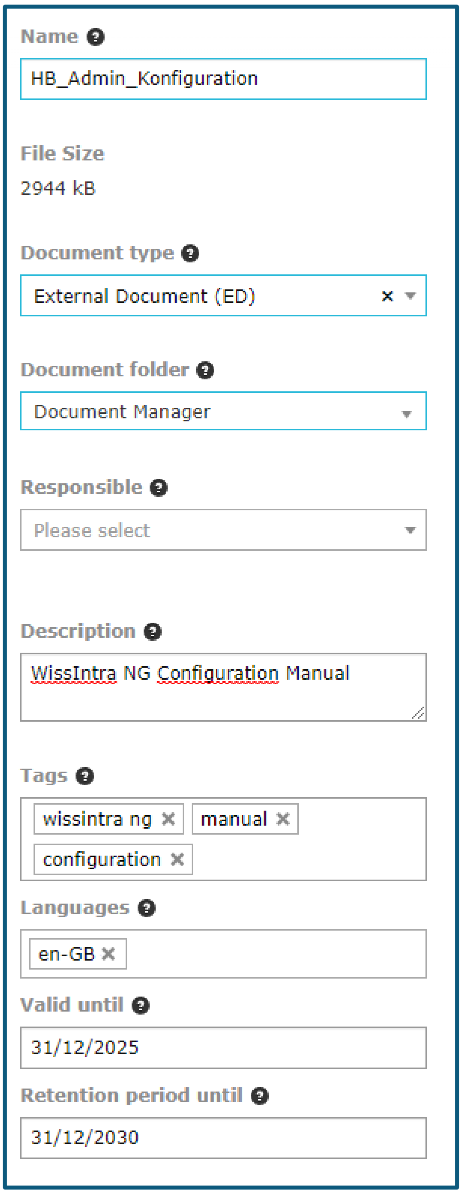


Upload document

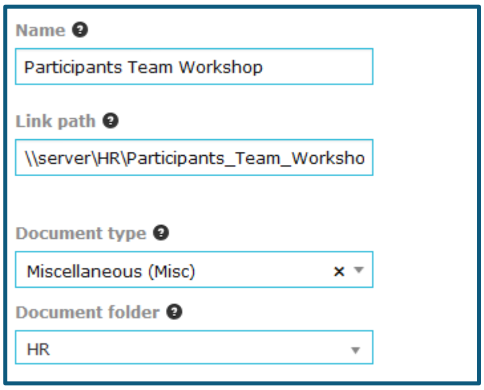
If the document has not been stored in WissIntra NG yet, you can upload it with this option.

Select the desired document in the opening Explorer window. A submodal opens with the following information:

- The **Name** of the selected document appears in the first field. You can change it here.
- The **File Size** is displayed.
- In the field **Document Type** you have to select the appropriate option from the drop-down menu.
- Select the storage location in the field **Document Folder**. To do this, open the drop-down menu and navigate via .
- You can use the field **Responsible** to select a user who should be responsible for maintaining and validating the document.
- As soon as you have determined a user responsible, the field **Substitute** appears. Here you can select another user who should be responsible for this document.
- In the **Description**, you can make a short classification of the document.
- In the field **Tags** you can assign keywords to the document. With these you can later find the document more easily by using a filter.
- The **Language** is an optional field that can also facilitate filtering. It is also useful to specify the language of the document when documents are created in several languages.
- An expiration date for the document can be entered under **Valid until**. You will recognize then by a marker in yellow that the document will soon expire and in red that the document has already expired. This is a very useful way to avoid old and unused documents.
- In the field **Retention period until**, you can specify the date up to which the uploaded document has to be retained.
- Click on **Save** to store the document in WissIntra NG.



Link document



You can also attach documents uploading them to the system. The document itself remains at its original location and you access it via the link. Keep in mind that as soon as the document path changes, access is no longer possible.

- In the submodal, you have to enter a **Name** and the **Link path** to the document.
- Fill in the other information as described for Upload document.

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

Linked documents are also saved as dataset within the Document Manager. You can recognize them by the fact, that they do not have a File Type.

In the detail view of a linked document the **Name** is linked to the corresponding file.

Select document

If you have already uploaded documents in the Document Manager, you can attach them by using this option at the appropriate position.

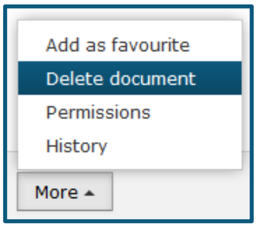
- In the opening submodal, you can navigate to the desired document via **All Documents**, **Unassigned documents** or by using the folder structure. You can also use the search filter below to reduce the list of documents.
- Click on the relevant document to attach it to the object.

Note: Within a process card, you can attach all document types, except the result document. These documents are added directly within the tab **Result Document** and are automatically attached to the process.

4.6 Delete documents

If you want to delete a document that is stored in WissIntra NG, you have three options:

Delete from detail view

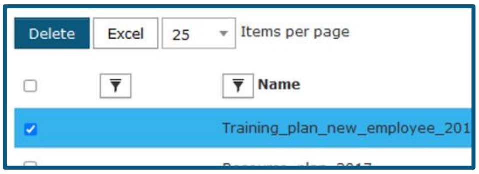


- Open the document by clicking on it in the table. This opens the detail view.
- Select the button More and click on **Delete** to remove the document from the system
- You will be asked for confirmation if the document should actually be deleted. Click on Yes to complete the deletion.

Delete from edit mode

- Open the document from the table and click on Edit
- Now proceed according to **Delete from detail view**.

Delete directly from the document list



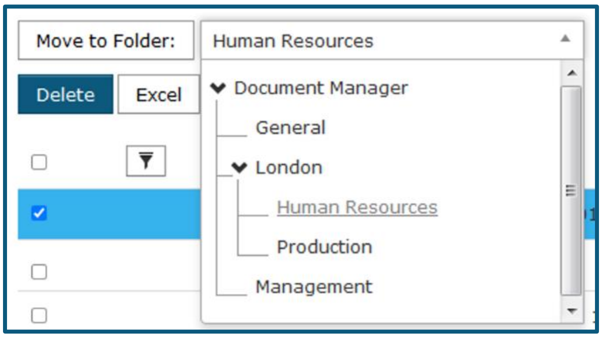
- Select the checkbox in front of the document.
- The button Delete appears
- Click on it and confirm to delete the selected document.

Note: If a document is linked to an object in WissIntra NG, you cannot delete it. You can see linked objects in the detail view of the document. Or you can adjust the table columns in the overview to see the **Number of links**.

As an administrator you find the section **Recycle Bin** in the settings. It contains all documents that have been stored in WissIntra NG and deleted afterwards. These documents are listed in a table. By clicking on Excel you can export this list.

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

4.7 Move documents to another folder



In the Document Manager you have the possibility to move documents from one folder to another.

- Select the document in the table by clicking on the checkbox in front of it.
- You find the button Move to Folder: and a selection field above the previously described **Delete** button.
- First, click in the selection field and use the arrow to navigate to the desired folder.
- As soon as you have selected a folder the **Move to Folder** button is active.
- By clicking on Move to folder: the document is moved.

4.8 History

As a quality management tool, WissIntra NG offers an overview of all documents used and stored in the system.

Versions

If a document is edited and uploaded again, it is represented as a new document version.

In the tab **Versions** within the detail view of a document you can find an overview of all previous versions. Changes in the title of the document are also listed here.

History of a single document

Besides the information about the document versions, you can also find more detailed information about all the changes related to the document in the history.

- To see the history for a single document, open the detail view of a document and click on More and **History**.
- A submodal opens and shows all the changes made to the document.

In the footer of this submodal you have the possibility to select a start and end date to display only the changes made in this time frame.

Document History

As an administrator you have the possibility to display all changes for all documents in WissIntra NG.

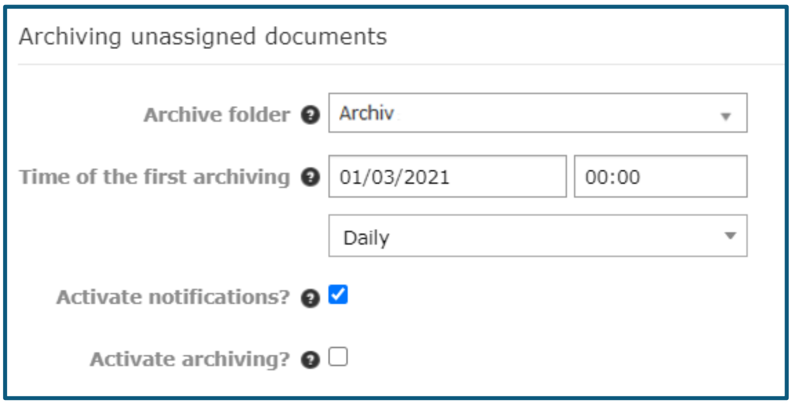
- Navigate to the Document settings and click on the option **Document History**.
- First, you have to set the time frame by selecting **From** and **Until**.
- Then click on Show history to open another window, which shows all changes for the selected period.

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.

4.9 Archiving unassigned documents

As an administrator, you can configure the archiving of **Unassigned documents** in the **General Settings** for the Document Manager, that means, that the documents are moved to a folder specified by you.

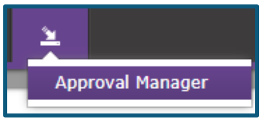
You can determine the **Archive folder** and the **Time of the first archiving** and choose whether the documents should be archived **Daily**, **Weekly** or **Monthly**. You can also decide whether **Notifications** should be sent for the documents moved by the archiving and **Activate** or deactivate the archiving.



5 Approval workflow

The **Approval Manager** in WissIntra NG allows users to manage approvals related to document changes.

As soon as an Obligatory or Optional Approval Workflow type is assigned to a document type as described below, the Approval Manager module is activated after you logged in the next time.



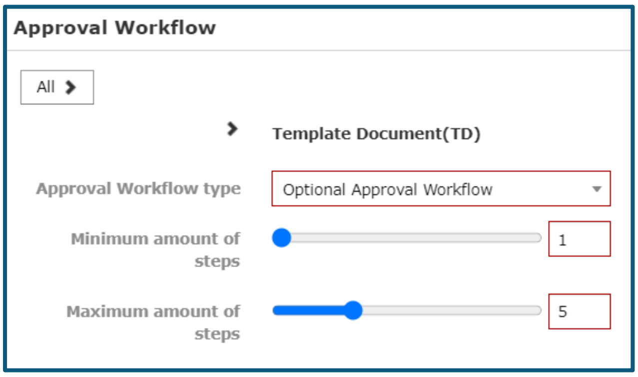
5.1 Configure approval workflow

Whether a document is subjected to an approval workflow is determined by its document type.

When you as an administrator define the document types for your company, please consider which ones should be subjected to an approval workflow. It might be helpful to add e.g. “with approval workflow” in the name of the document type.

After defining the document types, you as an administrator you can assign each document type to a specific approval workflow type.

- In the **Settings**, navigate to the section **Documents** and click on **Approval Workflow**.



Here you can choose between three options for each document type individually.

1. **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.

2. **Optional Approval Workflow**

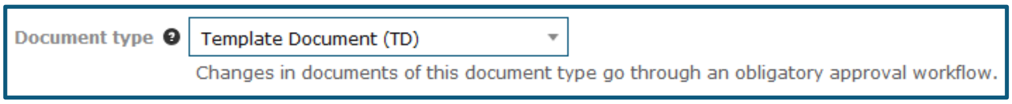
Here, the user who creates or edits a document of the corresponding document type can decide whether the document is subjected to an approval workflow or not. You can also set the **Minimum** and **Maximum Amount of Steps** as well as the default **Approvers**.

3. **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.

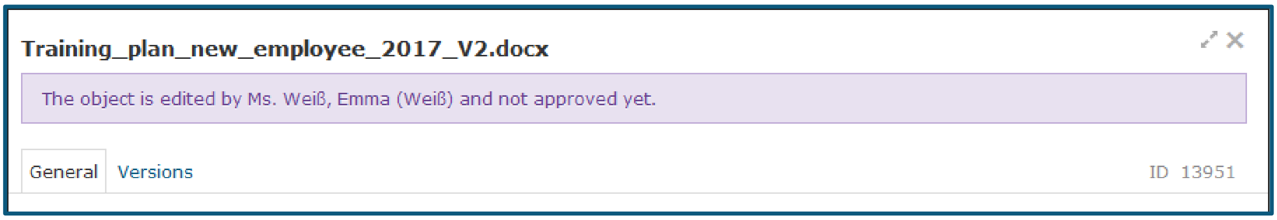
If you upload or change a document of this type it is immediately visible in the Document Manager.

As soon as you upload or edit a document, you will get an explanation which approval workflow type is used for the chosen document type.



If you upload a document of a document type assigned to an **Obligatory** or **Optional Approval Workflow**, only you can see the document directly in the Document Manager. The other users will see it as soon as it was approved.

If you change a document of these types, the document is still visible in the Document Manger but it shows a message that indicates the unapproved changes. Other users cannot edit the document as long as it isn't approved.



If you upload or change a document of a document type assigned to **No Approval Workflow**, they are immediately visible in the Document Manager.

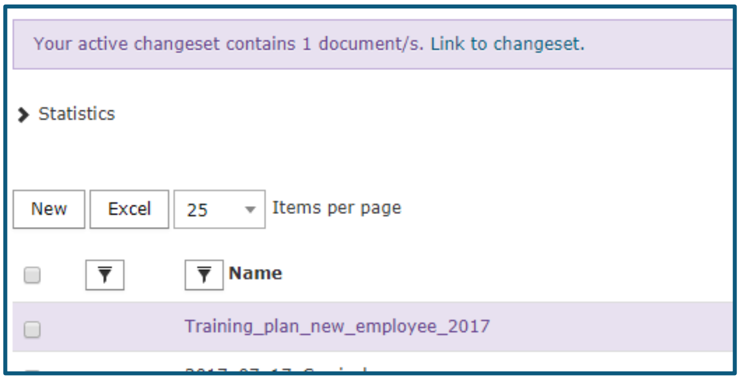
Note: By assigning the approval workflow option to the respective document types, a company can map the company-specific guidelines and encourage the WissIntra NG users to follow them.

5.2 Actions that trigger an Approval Workflow

The following list shows the actions for which a document of the appropriately configured document type is subjected to an approval workflow:

- Creating a new document in the Document Manager
- Generating a new document via "Upload document" or "Link document" within a WissIntra NG object (process, action,...)
- Editing the fields or deleting an entry in the modal of a document
- Upload a new version of a document
- Moving a document to another document folder
- Delete a document
- Changing the document type to one for which an optional or obligatory workflow has been configured (Changing a document type with workflow to one without does not trigger a workflow!)

5.3 Changesets in the Approval Workflow



When you change documents of a document type with obligatory or Optional Approval Workflow assigned, they are collected within a changeset.

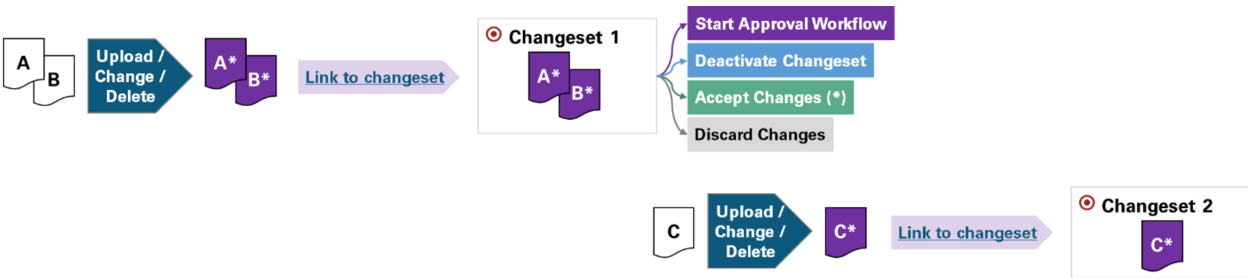
The fact that a document is in an active changeset is marked with a coloured background in the Document Manager. In addition, a link is displayed at the top that opens the Approval Manager and shows the corresponding changeset.

As soon as you modify the status of this changeset it is closed and the next changes will be collected within a new changeset.

In this way you can combine related documents in one changeset that can be approved at once later.

The following graph shows the changed documents A and B which are collected in Changeset 1.

As soon as the user modifies Changeset 1, the changed document C is stored in Changeset 2.



A: original document A*: document with unapproved changes (*): only Optional Approval Workflow

Note: The approvers are defined for the entire changeset. That means that all documents have to be approved by the same users. Therefore, please check if the currently active changeset is suitable for your planned document changes.
If the active changeset is not suitable, consider deactivating it. Then you can either create a new changeset by simply editing the document or choose another existing changeset by activating it as described in the following.

In the Approval Manager, the Explorer on the left shows the familiar tree structure where you can navigate using the arrows. It is divided in two main categories:

My pending changes: all changesets created by the current user

My pending approvals: all changesets for which the current user is the approver

As administrator you can see two more branches:

All pending changes: all changesets created by any user

All pending approvals: all changesets for which an approval workflow has been started by any user

By clicking on one of the changesets, it opens in the table on the right.

To edit the properties of the changeset, click on the magnifying glass. Here you can modify the **Title** and the **Owner** of the changeset. This can only be done by the original owner of the changeset or by the administrator who has global access to all changesets.

The following icons indicate the current status of a changeset:

- In Progress : active changeset in which the changes are collected
- In Approval : changeset for which the approval workflow has been started
- Rejected : inactive changeset for which the approval workflow has been interrupted or that has been rejected by the approver
- Shelved : inactive changeset that has been deactivated

Note: If your administrator has done the appropriate settings, you will get an e-mail notification if the status was changed and e.g. your approval is needed or someone approved your changeset.

5.4 Working with the Approval Workflow

The Approval Manager in WissIntra NG offers different options for handling changesets. In the following you learn about what you can do as the owner of a changeset and as the approver.

5.4.1 Working with the Approval Workflow as the owner of the changeset

As the owner of the changeset you find the corresponding changeset in the Approval Manager Explorer within **My pending changes**.

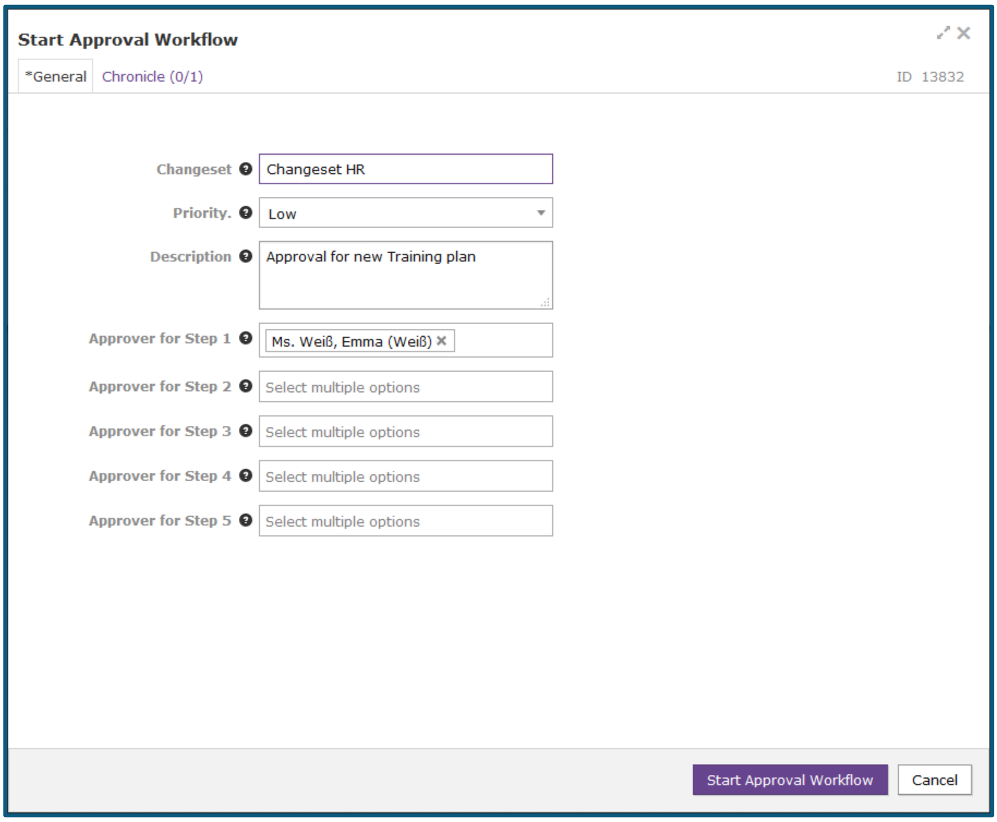
For the active changeset ( ) you can execute the following actions:

- Start Approval Workflow
- Accept changes (only if the changeset consists of documents which have to go through an Optional Approval Workflow)
- Discard changes
- Deactivate changeset

Start Approval Workflow

- Select the active changeset in the Approval Manager and click on Start Approval Workflow

A modal opens with the following fields:

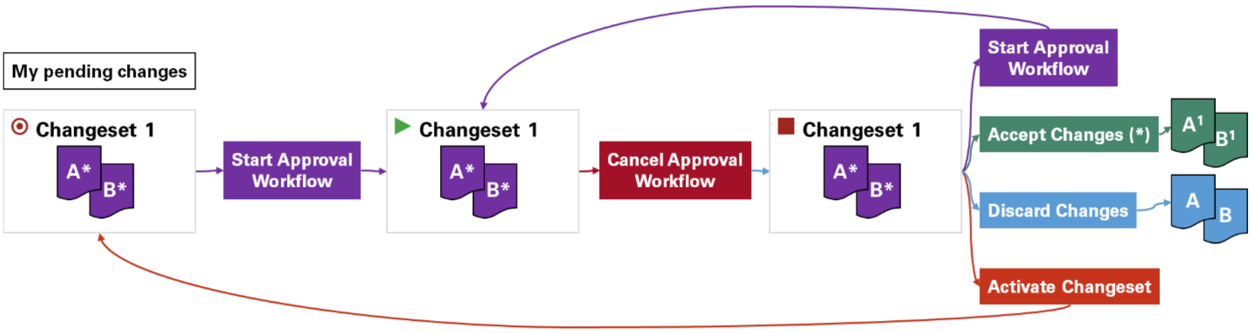


- In the field **Changeset** you can change the name
- You can choose the **Priority** to be Low, Medium or High
- By adding a **Description** you can specify the changeset for the approver or the changed parts of the document
- The next fields contain the **Approvers** for this changeset.
  Depending on what the administrator has defined to be the **Minimum** and **Maximum amount of steps** you have to fill in 1 or more steps by selecting one or more users.
- Now click on Start Approval Workflow to start the approval workflow

Note: Please note that you can start the approval workflow only for the entire changeset.

As soon as you start the approval workflow the status of the changeset is switched to “In approval”.

The following diagram shows the possible options and statuses of a changeset after you started the workflow.



A*: document with unapproved changes A^1: changed document
A: original document without changes   (*): only Optional Approval Workflow

Cancel Approval Workflow

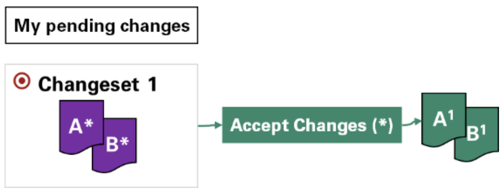
If you want to stop the approval workflow you can cancel the approval workflow and deactivate the changeset ( ) by clicking on Cancel Approval Workflow .

With this, uploaded documents will be visible only for you, changed documents are visible for all users but blocked from editing.

Changesets in this status can be proceeded in the same way as active changesets.

Accept Changes

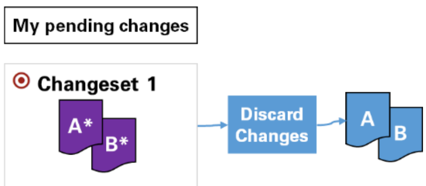
If a changeset only consists of documents which have to go through an Option Approval Workflow, you have the option to accept the changes directly. By clicking on Accept Changes you can skip the approval workflow and all changes made to the documents are saved and visible in the Document Manger.



Note: As soon as there is one document that has to go through an Obligatory Approval Workflow in the changeset, the entire changeset has to be subjected to the approval workflow.

Discard changes

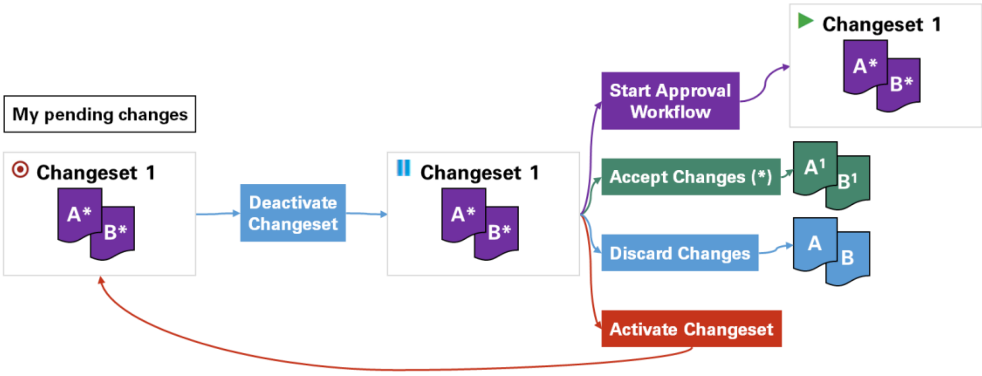
As long as the changeset is not in the status “In approval” you can use the option Discard Changes anytime to discard the changes made to the documents. With this all documents within the changeset are reset to their original state without any changes.



Deactivate Changeset

In the Approval Manager, only one changeset can be the "Active Changeset". Thus, if you want to collect edited documents in a different changeset, the active one has to be deactivated first via Deactivate Changeset . All changes are kept and the changeset is put on hold.

The diagram shows the possible options and statuses of a changeset after you deactivated it.



A*: document with unapproved changes A^1: changed document
A: original document without changes   (*): only Optional Approval Workflow

Discard Changes (as an administrator)

If you are an administrator you can see all changesets with pending changes. As long as these are not in the status "In approval" you have the option to discard the changes for each changeset even if you are not the owner by clicking on Discard Changes . All changes are reset and the original documents are shown.

5.4.2 Working with the Approval Workflow as the approver

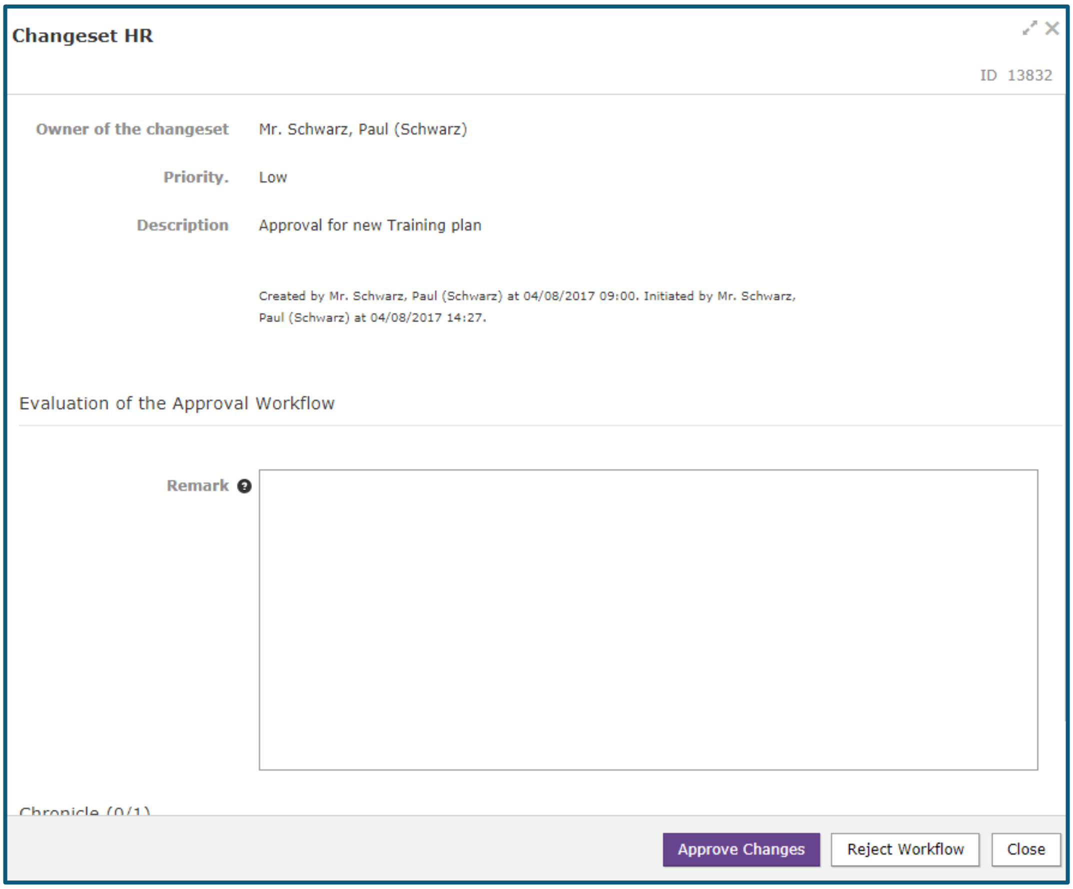
As the approver you find the corresponding changeset in the Approval Manager Explorer within **My pending Approvals**.

For changesets in approval workflows you can execute the following actions:

- Evaluate
- Cancel workflow (only if you are an administrator)

Evaluate

- Click on **Evaluate** in the corresponding changeset to open the following modal.



You see the **Owner of the changeset**, i.e. the person who started the approval workflow. Also the chosen **Priority** and the **Description** are visible.

- Click on **Approve Changes** to approve the changes

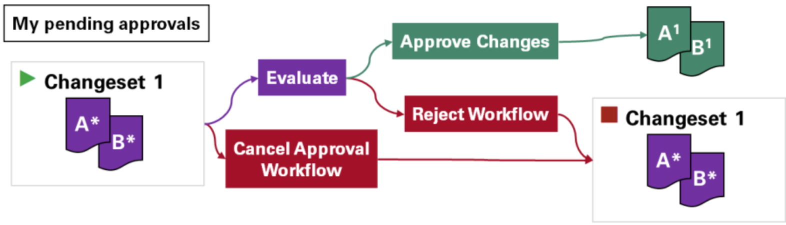
If there was more than one step defined in the approval workflow the changeset is submitted to the next step.

- If you do not want to approve the changes, you have to fill in a **Remark** and click on **Reject Workflow** .

The changeset will be reassigned to the owner for editing.

Note: If there was more than one approver selected in one step, all of them have to approve the changes before the changeset is submitted to the next step.

The following diagram shows the possible options from approver's point of view after a user has started the workflow.

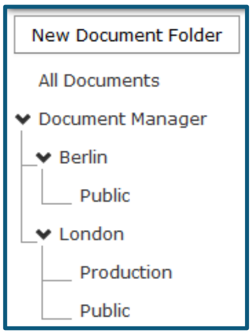


A*: document with unapproved changes A^1: changed document

Cancel Approval Workflow (as an administrator)

If you are an administrator you can see all pending approvals. You have the option to cancel the approval workflows for each changeset in the pending approvals by clicking on Cancel Approval Workflow . The changeset is now deactivated ( ).In that status you can again execute the same actions as for the active changeset.

6 Permissions for folders and documents



In WissIntra NG document permissions are given by assigning roles to folders and documents.

If permissions have been assigned to a folder or a document, they are implicitly inherited in the underlying levels.

For example in the folder structure shown here, the permissions of the root folder Document Manager are inherited to all underlying folders.

If you want to change the permissions for an underlying folder, you have to modify it explicitly.

Note: Please consider that explicit permission changes are again inherited implicitly to the underlying levels as long as these have not been changed explicitly.

Note: If you want to give permissions to a folder in a lower level for one specific role, you have to give this role at least the permission List for all parent folders. Otherwise a user with the according role is not able to navigate to the folder and thus cannot see it.

The following table describes the effects of the permissions for the folders and documents.

Permission	Explanation for folders	Explanation for documents
List	You can see the folder and its content.	You can see the document title, but you cannot open the document in detail view or download it.
Read	You can see the folder and its content and you can open the detail view of the folder.	You can see the document, open the detail view and download it.
Change	You can rename or move the folder by assigning a new parent node.	You can change the detail information of the document and upload a new version, the document can be checked out and in.
Create	You can create new documents or subfolders in this folder.	No effect
Delete	You can delete the folder.	You can delete the document.
Permit	You can change the permissions for the folder.	You can change the permissions for the document and a checked out document can be checked in via “Checked out documents”.

System Roles

In WissIntra NG each user is automatically assigned to one of the two system roles **Read User** or **Power User**, according to his licence type.

As described in chapter 2.4 Permission Concept these two licence types define the general access and permissions for all modules.

Thus, the system role Power User can have all permissions within the Document Manager. However, the system role Read User cannot get other permissions than **List** or **Read**.

Power User	Read User
List	List
Read	Read
Change	(Change)
Create	(Create)
Delete	
Permit	

Note: The permissions „Create“ and „Change“ allows a Read User only to link documents to an action in the Action Manager (because he is responsible) or to delete this link again. The user is NOT ALLOWED to create or change documents in the Document Manager directly.

Individual roles

You can assign the roles that you have created in your role concept to the folders or documents.

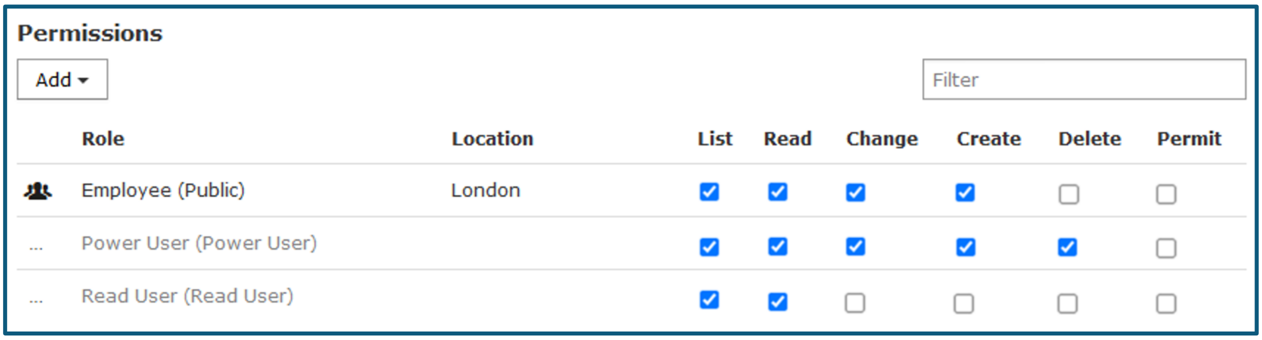
Note: Roles are created and assigned by the administrator. The procedure for this is explained in the **Administrator Manual Configuration**.

6.1 Change permissions

To see and change the permissions for a folder or document, proceed as follows:

- Open the detail view by clicking on the document in the document list; or by clicking on the magnifying glass of the desired folder in the tree view on the left.
- Click on More and select **Permissions**.
- A submodal opens and shows the roles already assigned and the set permissions.

In this submodal the font colour indicates if it is an implicitly inherited permission (grey) or an explicitly changed one (black).



- Here, you have the possibility to change the permissions by selecting or deselecting the corresponding checkboxes.
- Click on Save to store your changes.

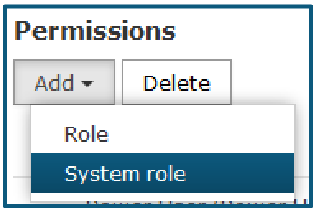
If permissions have been given implicitly to a folder or a document, they cannot be deleted.

However, you can change them and save them as explicit permissions. The font colour will change from grey to black.

Note: You have to set each permission separately. There is no correlation between them. If you only give e.g. List and Permit, the user can only see the title of the document but cannot change it.

6.2 Add permissions

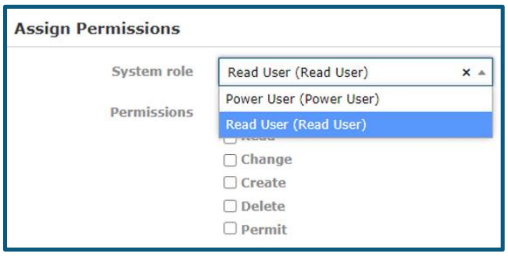
- By clicking on Add you can assign other roles to the folder or document.
- Here you see two options: **Role** and **System Role**



6.2.1 Add permissions via System Role

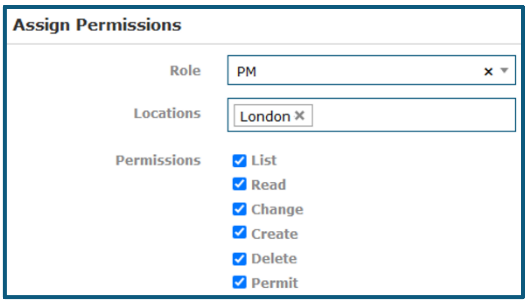
To add a system role to a folder or document, proceed as follows:

- Click on Add in the **Permissions** submodal and select **System Role**.
- Choose one of the roles and select the checkboxes for the desired permissions.
- Click on Save to add the role.



Note: If you add a system role that was already added implicitly or explicitly to a folder or a document with different permissions, you overwrite the existing permissions.

6.2.2 Add permissions via individual roles



To assign roles, proceed as you have done for the system roles:

- Open the detail view of a folder using the magnifying glass (appears on mouse-over) or click on a document.
- Navigate to the **Permissions** submodal via More .
- Click on Add and select **Role**.

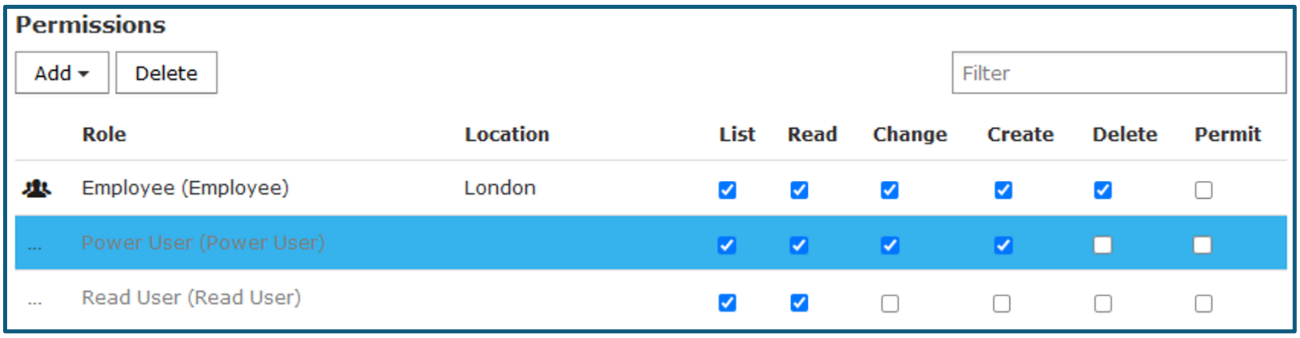
- First, select one of the roles from the drop-down that shall have permission for the selected folder or document.
- Then, select the location in which this role shall have the permission for.
- Select the checkboxes for the desired permissions and click on Save .

6.3 Delete permissions

When you click on a role within the **Permissions** submodal, the button Delete appears.

Deleting permissions has different effects:

1. Delete an inherited system role:
   is not possible and therefore has no effects
2. Delete an inherited system role that was changed:
   The permissions are reset to be the same as the parent folder.
3. Delete an inherited individual role:
   is not possible and therefore has no effects
4. Delete an inherited individual role that was changed:
   The permissions are reset to be the same as the parent folder.
5. Delete an individual role that was separately added:
   The selected role and its permissions will be deleted and the selected line will disappear from the submodal.



6.4 Defining permissions for the folder “Document Manager”

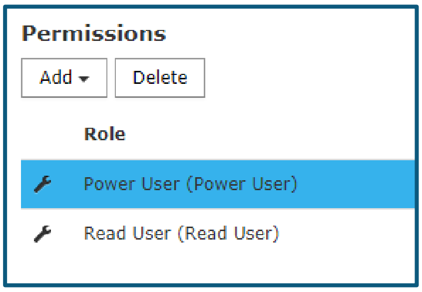
Due to the permission inheritance, it is useful to start assigning permissions from the root folder “Document Manager” on. Thus, the given permissions are valid for all subordinate folders and documents. In the next step, you can change the permissions of individual folders or documents by explicitly restrict or extend the permissions.

- Open the detail view of the root folder “Document Manager” by clicking on the magnifying glass and navigate to the **Permissions** submodal via More .

Note: After the first installation or migration of Wissintra NG, the system roles Power User and Read User are assigned to the root folder with the permissions shown above.

You can change the permissions here as previously described.

Or you can also delete the system roles by selecting the corresponding line and clicking on **Delete**.



Note: We recommend keeping the given system roles and permissions for the root folder.

Note: If you remove the permissions for the root folder, only the administrator has access to it.

Note: We recommend deselecting the checkboxes for system roles rather than deleting them.

6.5 Exceptions and special features

Read User is assigned to an action

As described above, a read user cannot normally attach or upload documents due to the restrictions of the system role. However, there is a special case in which he or she can do this.

As soon as one of the Read User's roles is assigned to a folder with the permission **List**, **Read** and **Change**, he can attach another document to this action by **Select Document** from his accessible folders. The permission **Change** also allows the Read User to remove the attached document from this action. But he cannot modify the document itself.

Besides that, if one of the Read User's roles is assigned to a folder with the permission **Create**, he can even attach a new document by **Upload Document** within the action to his accessible folders.

Attached Documents

The visibility of an attached document within the object depends on its permission level.

> Note: Furthermore, the visibility of attached documents always depends on the user's permission for the respective module and on the previously described regulations for the Read User and Power User licence.

No permissions: The user sees a message that says that he does not have sufficient permissions to see the document.

List: The user is able to see the document title within the object.

Read: The user is able to download the document and see the detail view of the document.

Change: The user is able to download the document, see the detail view and delete the document link within the object.

Changed permissions when documents are moved

As long as a document has no explicit permissions, it inherits the permissions of the target folder when it is moved.

However, as soon as the authorizations of a document differ from the authorizations of the folder in which the document is located (explicit authorizations), these are retained when the document is moved.

Example

Permissions for the folder "Document Manager - London"

Inherited, implicit permissions of the folder “Document Manager”.

Role	Location	List	Read	Change	Create	Delete	Permit
Power User (Power User)		☑	☑	☑	☑	☑	☐
Read User (Read User)		☑	☑	☐	☐	☐	☐

Permissions for the folder “Document Manager – London – HR”

Changed and enhanced, explicit permissions.

Role	Location	List	Read	Change	Create	Delete	Permit
HR (HR Manager)	London	☑	☑	☑	☑	☑	☐
Power User (Power User)		☐	☐	☐	☐	☐	☐
Read User (Read User)		☐	☐	☐	☐	☐	☐

Permissions for a document in the folder “Document Manager – London – HR”

Both inherited, implicit and changed, explicit permissions.

Role	Location	List	Read	Change	Create	Delete	Permit
HR (HR Manager)	London	☑	☑	☑	☑	☑	☐
Power User (Power User)		☑	☑	☑	☐	☐	☐
Read User (Read User)		☐	☐	☐	☐	☐	☐

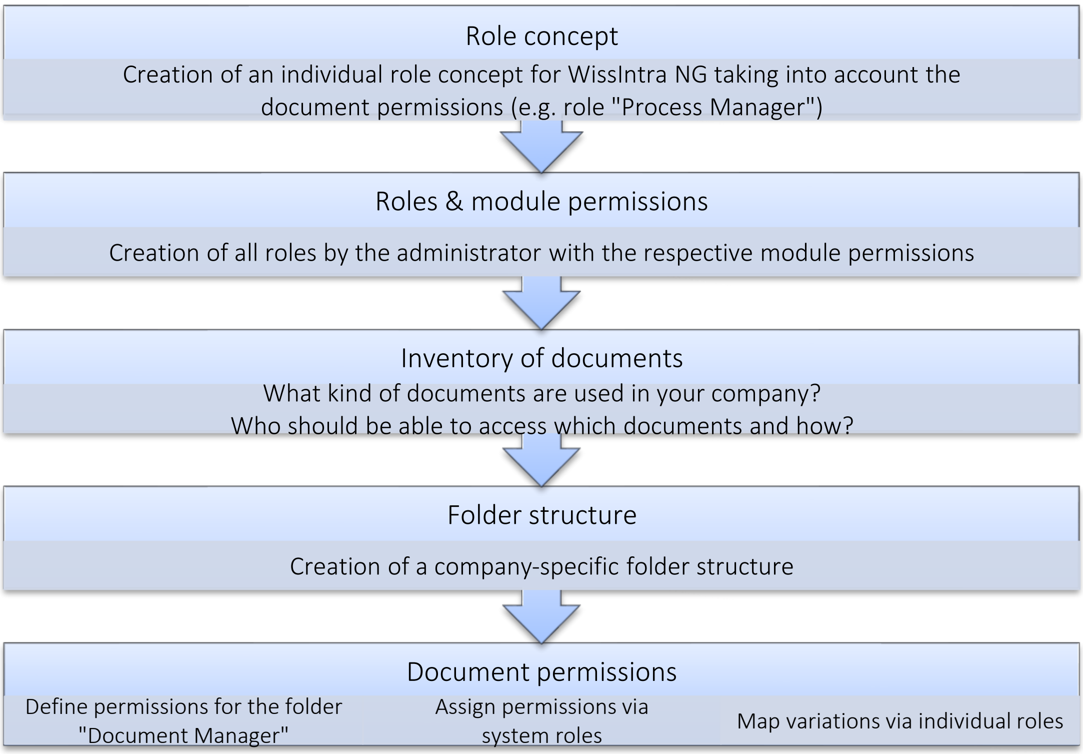
Permissions for the document after it has been moved to the folder “Document Manager – London”

The changed, explicit authorization is retained, the inherited, implicit authorization is taken from the target folder.

Role	Location	List	Read	Change	Create	Delete	Permit
Power User (Power User)		☑	☑	☑	☐	☐	☐
Read User (Read User)		☑	☑	☐	☐	☐	☐

6.6 Preparations for implementing document permissions

In the Document Manager you have the possibility to regulate the access to documents. This allows you to enable or prevent access to folders or documents for users according to your company's requirements. The following diagram illustrates the scheme for setting up document permissions in WissIntra NG:



Role concept

The general role concept defines the user's access to the WissIntra NG modules and locations.

The structure of the role concept depends on the structure and philosophy of your company. The more detailed the roles are defined, the more precisely permissions can be assigned to individual users and the more roles an individual user may have.

Besides that, you need to consider the access to folders and documents in your concept and answer the following questions:

- What documents are there in the company?
- Who should be able to see which documents?

It is important to create a concept that covers all permissions within the company. To prevent the concept from getting to complex, try to use as few "extra roles" for individual users as possible.

Note: We strongly advise you to document and maintain your role concept in order to be able to track occurring changes.

Roles & module permissions

As an administrator you can either use the system roles (Power User and Read User) or create new roles with the respective module permissions.

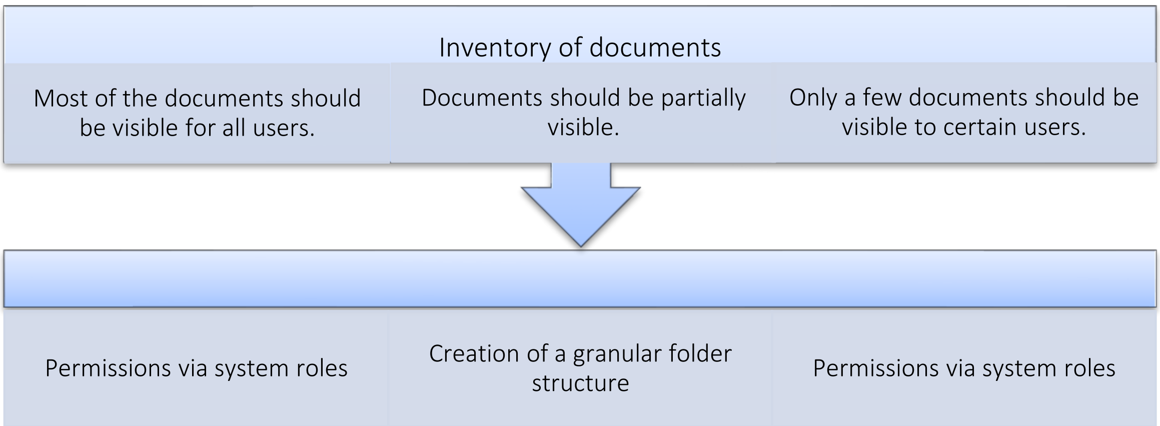
This allows you to control, for example, which users should have access to the document manager at all.

To learn more about creating roles and assigning them to users, please refer to the **Administrator Manual Configuration**.

Inventory of documents

We recommend performing a sort of inventory of your documents to answer the question how many users will have access to the largest part of documents. There are three possible scenarios:

1. A large part of the documents should be visible to all users:
   In this case, a concept can be developed using the system roles, which include a large number of users.
2. An undefined number of documents can be public, others may only be seen by specific user groups or individual users:
   Due to the number of different user groups, the permissions must be granted in detail. Here a good folder structure can help grouping the documents and granting permissions.
3. A large number of documents should not be visible:
   Here, you can also use the system roles to give e.g. only to a certain user group the permission to access the Document Manager.



Folder structure

When building a folder structure, the following questions can be helpful:

- Why is the access to the specific documents restricted? Can you summarize the reasons for this restriction?
- Which users should have access to which documents? Can you group these?
- Are there multiple locations? Can it be useful to build a location-specific folder structure?
- Are the documents valid throughout locations? Can it be useful to classify them by topic?

6.7 Example

In the following, we have created a possible permission concept for an exemplary company.

> **Note:** Please note that the permission concept for each company results from its individual characteristics and structures, and thus cannot be transferred to another company.

A company has two locations, one in Berlin and one in London. The following people work for that company:

Emma Weiss works as a Human Resources Manager and is responsible for Berlin and London.

Paul Schwarz is the Process Manager responsible for the Production Processes in Berlin.

And Jack Grey works as a Production Assistant in London.

Role concept

In WissIntra NG the administrator creates the users and roles for the company, such as:

Employee	Position	Location	Licence	Roles
Emma Weiss	Human Resources Manager	Berlin & London	Power User	Berlin: Employee (Employee), HR (HR Manager) London: Employee (Employee), HR (HR Manager)
Paul Schwarz	Process Manager	Berlin	Power User	Berlin: Employee (Employee), PM (Process Manager), PW (Production Worker)
Jack Grey	Production Assistant	London	Read User	London: Employee (Employee), PW (Production Worker)

Inventory of documents

Most of the company's documents should be visible for most of the employees. But the company decided to separate the documents by location. So, the administrator creates a folder structure for both locations:

Folder structure

HR:
Only people working in the HR department should be able to see the folder and the documents. They should also be able to upload, change or delete documents there.

Production:
Only employees working in the production at the respective location should be able to see the folder and read the documents.
Only the Process Manager of the respective locations may upload, change or delete documents.

Public:
All employees should be able to read and download documents.

Besides that users with Read User Licence from the respective location should also be able to upload documents to the folders “Production” and “Public” as soon as they are assigned to an action. Therefore both roles “Production Worker” and “Employee” are added with the additional permission **Change** and **Create** to the folders “Production” and “Public” for the according location.
Furthermore, only the administrator should be able to set permissions for folders or document. Therefore, no role will get the permission **Permit**.

Document permissions

The administrator defines the permissions as follows:

Folder	Role	Location	List	Read	Change	Create	Delete	Permit
Document Manager	Power User (Power User)		☑	☑	☑	☑	☑	☐
	Read User (Read User)		☑	☑	☐	☐	☐	☐
Berlin	Power User (Power User)		☑	☑	☑	☑	☑	☐
	Read User (Read User)		☑	☑	☐	☐	☐	☐
HR	HR (HR Manager)	Berlin	☑	☑	☑	☑	☑	☐
	Power User (Power User)		☐	☐	☐	☐	☐	☐
	Read User (Read User)		☐	☐	☐	☐	☐	☐
Production	PM (Process Manager)	Berlin	☑	☑	☑	☑	☑	☐
	Power User (Power User)		☐	☐	☐	☐	☐	☐
	PW (Production Worker)	Berlin	☑	☑	☑	☑	☐	☐
	Read User (Read User)		☐	☐	☐	☐	☐	☐
Public	Employee (Employee)	Berlin	☑	☑	☑	☑	☐	☐
	Power User (Power User)		☑	☑	☑	☑	☑	☐
	Read User (Read User)		☑	☑	☐	☐	☐	☐
London	Power User (Power User)		☑	☑	☑	☑	☑	☐
	Read User (Read User)		☑	☑	☐	☐	☐	☐
HR	HR (HR Manager)	London	☑	☑	☑	☑	☑	☐
	Power User (Power User)		☐	☐	☐	☐	☐	☐
	Read User (Read User)		☐	☐	☐	☐	☐	☐
Production	PM (Process Manager)	London	☑	☑	☑	☑	☑	☐
	Power User (Power User)		☐	☐	☐	☐	☐	☐
	PW (Production Worker)	London	☑	☑	☑	☑	☐	☐
	Read User (Read User)		☐	☐	☐	☐	☐	☐
Public	Employee (Employee)	London	☑	☑	☑	☑	☐	☐
	Power User (Power User)		☑	☑	☑	☑	☑	☐
	Read User (Read User)		☑	☑	☐	☐	☐	☐

With this document permission concept, users now have the following options:

Emma Weiss (Human Resources, Berlin & London) sees all folders except "Production" underneath "Berlin" and "London".

Since she uses a Power User license, she is able to read, change, upload and delete documents in all folders she has access to.

Paul Schwarz (Process Manager, Berlin) sees the two folders "Public". Since he has the role "Process Manager" for the location Berlin, he can also see the folder "Production" underneath "Berlin".

Due to his Power User license he can read, change, upload or delete documents in these folders.

Jack Grey (Production Assistant, London) sees both folders "Public".

The folder "Production" underneath "London" is also visible to him, because he has the role "Production Worker" for London.

Since he uses a read user license, he can only read and download the documents.

However, as soon as he is assigned to an action, he can edit the action and upload documents. But only in folders for which one of his roles has the permission Create, i.e. "Production" and "Public" underneath "London".

If he has the permission Change for a linked document, he can also delete the document link within its assigned action. But he cannot edit the document himself.

Caution: If you remove for example the permission List and Read from the Read User role in the folder “Document Manager”, Jack Grey can no longer see any folders or documents in the Document Manager, regardless of which roles and permissions are set in the subfolders!

7 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)

8 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:

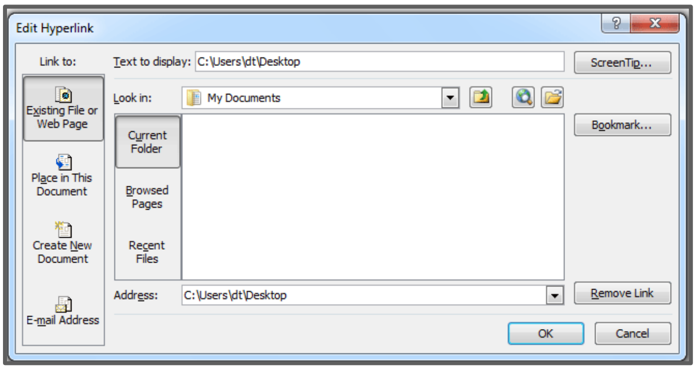
- Use CTRL + C to copy the address of the hyperlink and insert it into the Office document.
- Press **Enter** to automatically generate a link.

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.

9 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

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Service Desk

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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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