



# User Manual TypMaster/DD 3.1

## **PDC ECM&CRM&BI**

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# Imprint

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## Brief details

User Manual for TypMaster/DD, Release 3.1

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# 1 Online Document Distribution

These help pages describe the features of the application. Help sites can be displayed by

- clicking the "Help" button in the dialog window or

- clicking on the "Help" icon



The help page corresponding to the present feature (context sensitive help) will be displayed.

## 1.1 Note for users of Internet Explorer:

While running the application, the Internet Explorer occasionally shows a warning dialog to the effect that a script is causing delays.



In this case please press ,No' to let the application continue.

(Pressing 'Yes' would shut down the application.)

## 2 General principles of use

All functions of the application can be accessed via toolbar buttons, tabs and context (popup) menus.

### 2.1 Toolbar



The toolbars offer you a quick access to common features of the application. Click on an icon to start the corresponding feature. By positioning the mouse cursor on an icon, a bubble field will be displayed to give you some information about the corresponding feature.



UI setting (Simple and fast vs comfortable)



Language selection (German or English)



Refresh (Reload application / reload current display / reload current data)



Logout from server



Help (Help contents / help for current display)



New



Edit



Delete

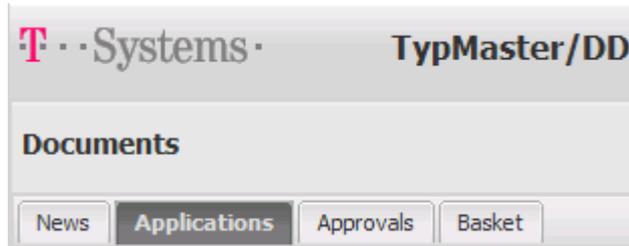


Export to Excel

### 2.2 Tabs

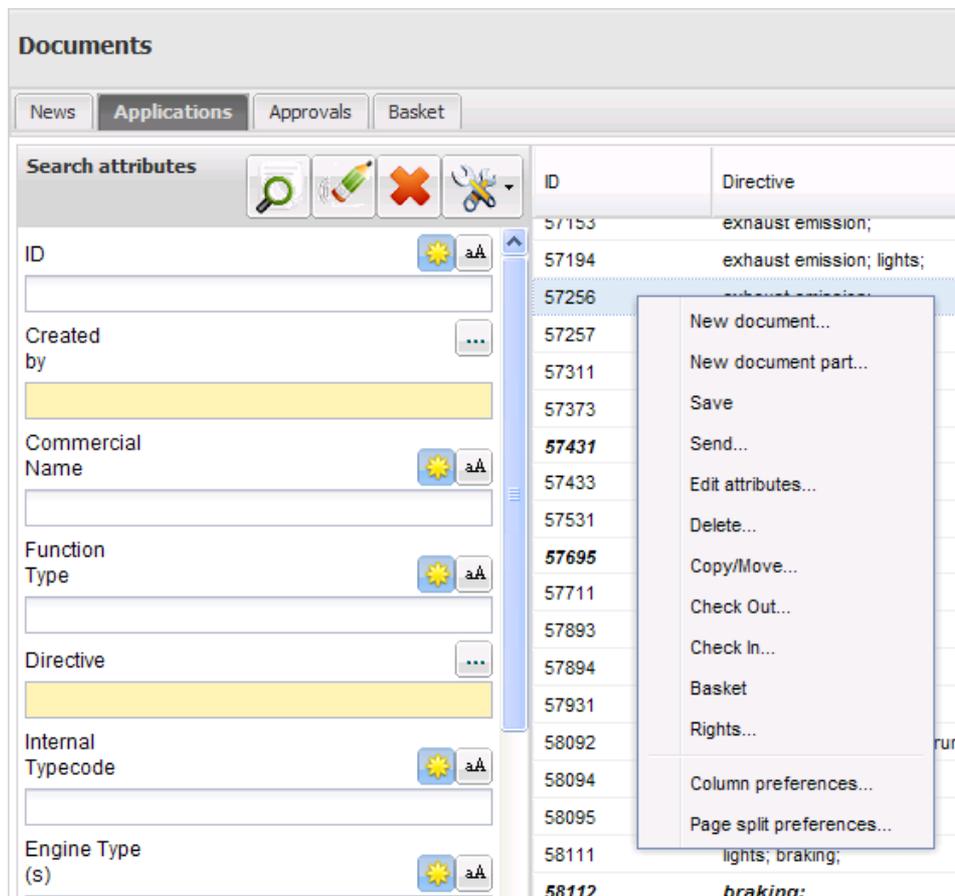
By default, every user may access the tabs 'News' and 'Basket'. Switching tabs is done by clicking them.

Archives that the user can see (a 'Read' right is needed for this) are shown as tabs, too.



## 2.3 Context menus

When you click the right mouse button on a list, tree or table a context menu pops up that contains menu items corresponding to the current display and the current selection.



All menus and features available in this application are explained in the following help sites.

## 2.4 Fields

### 2.4.1 Mandatory fields

When creating or editing documents or other data mandatory fields must be filled.

Mandatory fields are identified by an exclamation mark on yellow background directly next to the field:

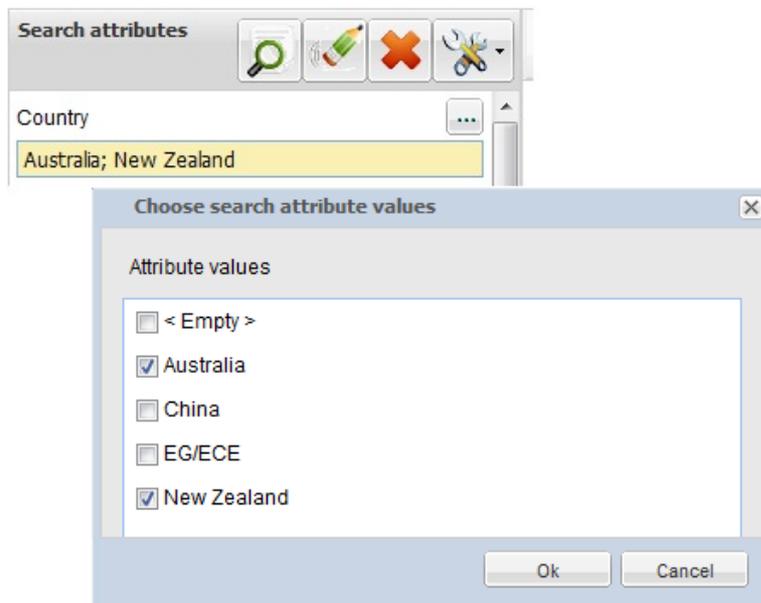
**Step 2 of 4: Define attributes**

|                   |  |
|-------------------|--|
| Commercial Name   |  M70  |
| Function Type     |  <input type="text"/>                                   |
| Directive         |  <input style="background-color: yellow;" type="text"/> |
| Internal Typecode | <input type="text"/>   |
| Engine Type(s)    | <input type="text"/>   |

## 2.4.2 Display fields and multi selection

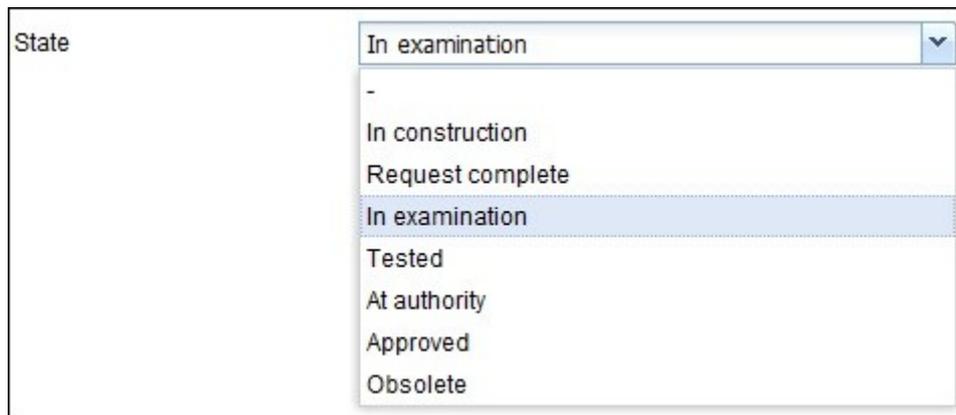
A field with the background color yellow cannot be edited directly:

- either it is used to display information only
- or it is a multi selection field. The data of a multi selection field has to be selected from a list displayed in a separate window. A click in the yellow field opens the list



### 2.4.3 Single selection field

The data for a single selection field has to be selected from the drop down list.



### 2.4.4 Date field

The date for a data field has to be chosen from the calendar. Click on the calendar symbol to open the calendar.



## 2.5 Wizards

Many functions of the application (e.g. for creating a document) are carried out using wizards. When the function is called up, the corresponding wizard dialog opens and guides the user through the function's actions..

The screenshot shows a 'Create Document' wizard dialog box. The title bar reads 'Create Document'. The main area is titled 'Step 2 of 4: Define attributes'. It contains the following fields:

- Commercial Name: V70 (with a warning icon)
- Function Type: (with a warning icon)
- Directive: (with a warning icon and highlighted in yellow)
- Internal Typecode: (empty)
- Engine Type(s): (empty)
- Approval No.: (empty)
- Version EEC: (empty)
- Approval Date: (empty, with a calendar icon)
- Amendment: (empty)
- Remarks: (with a warning icon)
- State: (dropdown menu)

At the bottom, there is a navigation bar with five buttons: 'Cancel', '< Back', 'Next >', 'Finished', and 'Help'. The 'Next >' button is highlighted in yellow.

Depending on the function this may take one or several steps.

For each step, actions like entering data or selecting values. Pressing *Next* causes the wizard to switch to the next step. This can only be done if the data for the current step is complete and correct.

Pressing *Back* switches to the previous step.

*Finish* saves all changes and closes the wizard.

*Cancel* closes the wizard without saving.

## 2.6 Common functions for tables

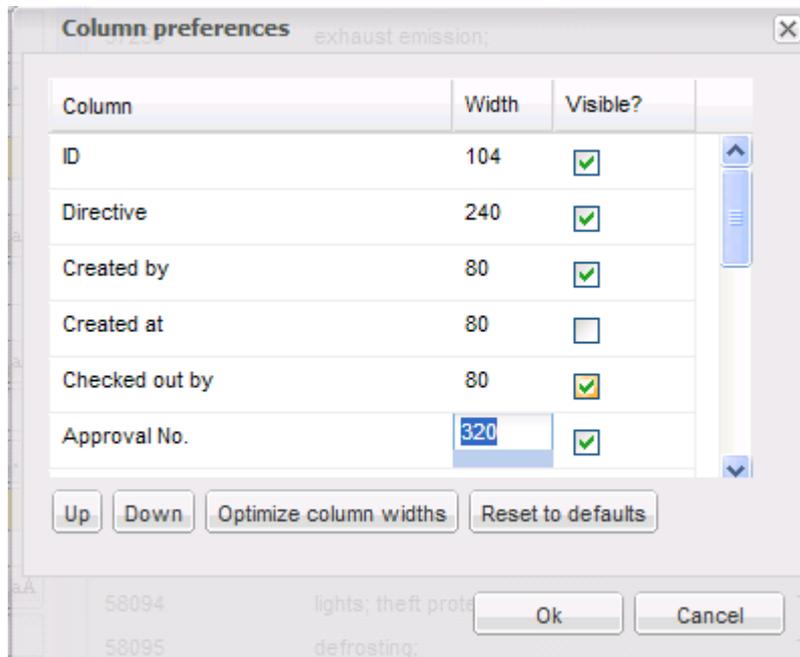
- Clicking on a row using the left mouse button selects (marks) this row. Ctrl + click can be used to select several rows, Ctrl + click on a selected row deselects that row. Shift + click is used to select a block of rows.

| ID           | Directive                  | Created by          | Created at ▲      | Cf        |
|--------------|----------------------------|---------------------|-------------------|-----------|
| 57153        | exhaust emission;          | A1XYZ, A1A          | 01.09.2010        |           |
| 57194        | exhaust emission; lights;  | A1XYZ, A1A          | 06.09.2010        |           |
| 57256        | exhaust emission;          | SYSADM, S...        | 15.09.2010        |           |
| 57257        | towing-device;             | SYSADM, S...        | 15.09.2010        |           |
| 57311        | exhaust emission;          | A1XYZ, A1A          | 19.09.2010        |           |
| 57373        | exhaust emission;          | A1XYZ, A1A          | 08.10.2010        |           |
| <b>57431</b> | <b>engine performance;</b> | <b>SYSADM, S...</b> | <b>14.10.2010</b> | <b>S1</b> |
| 57433        | coupling devices;          | SYSADM, S...        | 14.10.2010        |           |
| 57531        | exhaust emission;          | Test_User , 1       | 19.10.2010        |           |
| <b>57695</b> | <b>towing-device;</b>      | <b>SYSADM, S...</b> | <b>29.10.2010</b> | <b>S1</b> |
| 57711        | towing-device;             | SYSADM, S...        | 29.10.2010        |           |

- Clicking the right mouse button opens the context menu for the selected row(s).
- Clicking a row header sorts the table rows according to the contents of that column. Clicking the same column header again reverses the sort order.
- The table that is currently displayed can be saved locally using [Export to Excel](#).

## 2.7 Column preferences

Using this dialog the layout of the current table can be changed. The settings are saved for each user and each table and remain active when the user next logs in.

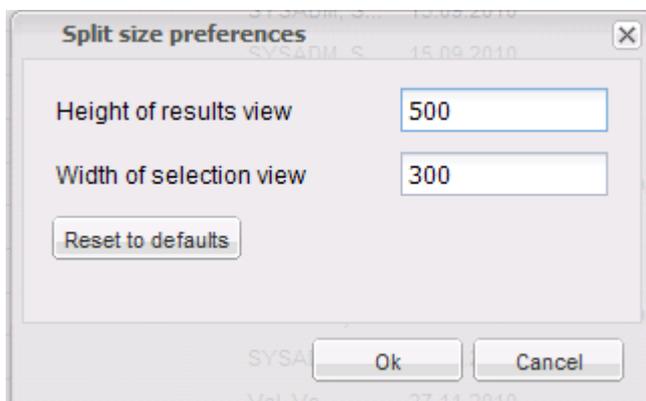


- Column visibility:  
Select or deselect the check box ,visible' for the column..
- Column width:  
By double clicking the width value of a column, this value may be edited. Clicking the button '*Optimize column widths*' changes the widths of all columns so that the longest content in each column can be displayed.
- Column order:  
The buttons ,*Up*' and ,*Down*' can be used to change the column order. Select a column and move it by pressing one of the buttons.
- Reset to Defaults  
This button resets column visibility, width and order to the application's default values for the current table.

By pressing ,*OK*' , the changes will be applied (the table will be reformatted); pressing ,*Cancel*' will close the dialog and discard the changes.

## 2.8 Page split preferences

Using this dialog the view parts' sizes for the current view can be changed. The settings are saved for each user and each view (e.g. News, each archive, Basket) and remain active when the user next logs in.



- *Height of results view* changes the position of the horizontal divider
- *Width of selection view* changes the position of the vertical divider
- *Reset to defaults* sets the divider positions to the application's default values for the current view.

By pressing ,OK', the changes will be applied (the table will be reformatted); pressing ,Cancel' will close the dialog and discard the changes.

## 2.9 Export to Excel



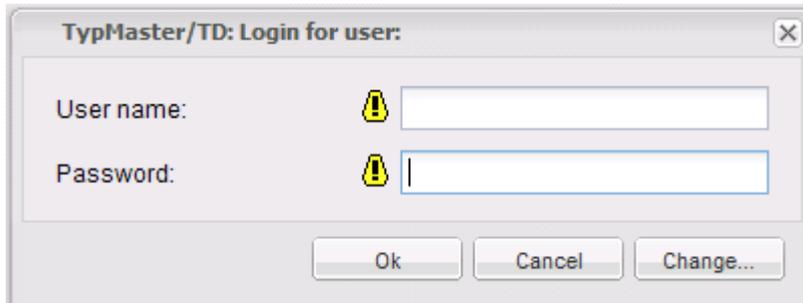
To transfer the result list of an archive to Excel, press the button *Export to Excel*. A browser dialog will open that allows you to store or open the Excel file that was generated by the application. The exact behavior depends on your local browser settings.

All data from the result list will be transferred to the Excel file.

## 3 Login and Logout

### 3.1 Login

This dialog window appears when the application is started:



The user has to identify himself with user name and password. User name and initial password are defined by the administrator. It is suggested to [change the password](#) immediately after the first login. Passwords are case sensitive.

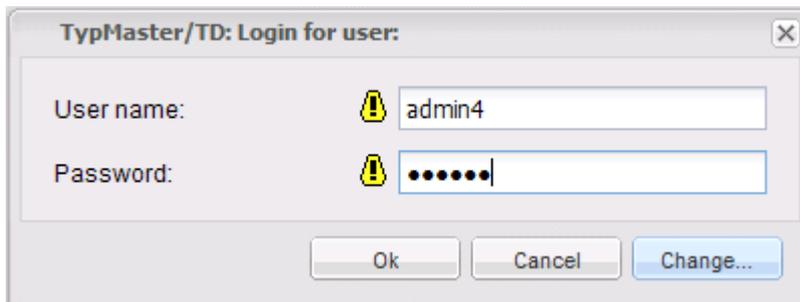
### 3.2 Logout



By pressing the button 'Logout from server', you exit the application and the [Login](#) dialogue reappears. Now you can log in again, e. g. with another User-ID. To definitely terminate the application, close the browser tab.

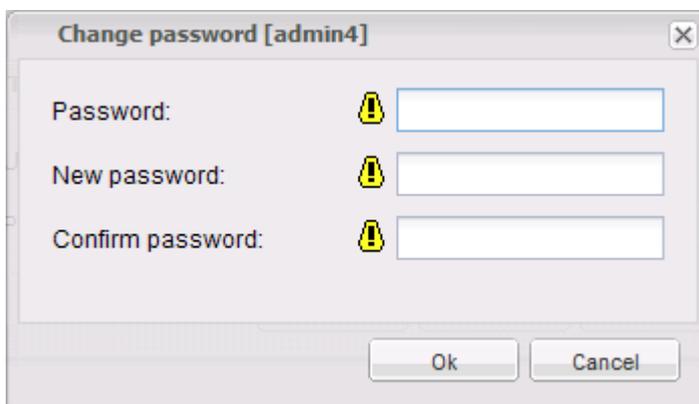
### 3.3 Change password

Press the *Change* button in the login dialog to change your password:



The image shows a dialog box titled "TypMaster/TD: Login for user:". It contains two input fields: "User name:" with the text "admin4" and "Password:" with masked characters (dots). Each field has a yellow warning icon to its left. At the bottom, there are three buttons: "Ok", "Cancel", and "Change..." (highlighted in blue).

Enter your current password and your new password. Repeat the entry of your new password and click the *OK* button. Your new password is active now.

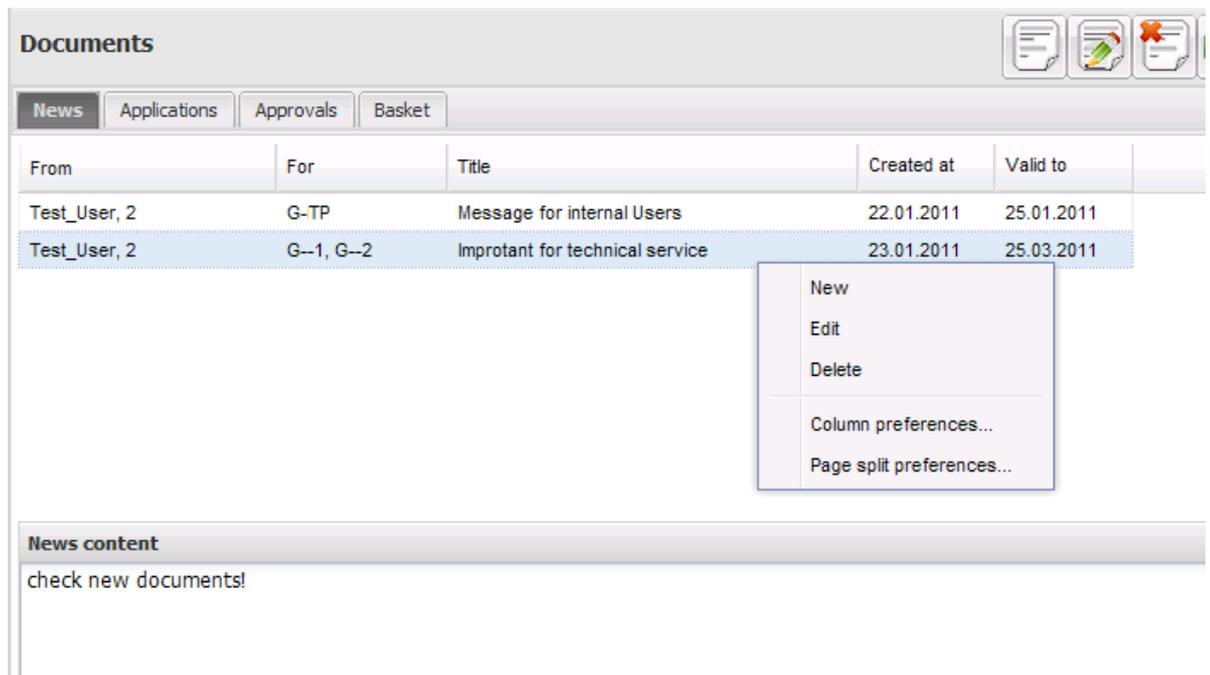


The image shows a dialog box titled "Change password [admin4]". It contains three input fields: "Password:", "New password:", and "Confirm password:". Each field has a yellow warning icon to its left. At the bottom, there are two buttons: "Ok" and "Cancel".

The new password must conform to the password guidelines defined for the system.

## 4 News

The tab *News* shows the news list. News are messages used to circulate information among the users or user groups. They are not to be considered as emails, because they neither have to be read nor have to be replied to.



The screenshot shows the 'Documents' application interface. At the top, there are navigation tabs: 'News', 'Applications', 'Approvals', and 'Basket'. The 'News' tab is active. Below the tabs is a table with the following columns: 'From', 'For', 'Title', 'Created at', and 'Valid to'. The table contains two rows of news items. The second row is selected, and a context menu is open over it, showing options: 'New', 'Edit', 'Delete', 'Column preferences...', and 'Page split preferences...'. Below the table is a section titled 'News content' which displays the text 'check new documents!'.

| From         | For        | Title                           | Created at | Valid to   |
|--------------|------------|---------------------------------|------------|------------|
| Test_User, 2 | G-TP       | Message for internal Users      | 22.01.2011 | 25.01.2011 |
| Test_User, 2 | G--1, G--2 | Improtant for technical service | 23.01.2011 | 25.03.2011 |

A list of the news addressed to the logged-in user - or to the user groups he belongs to - is shown in the upper part of the view. Besides the name of the recipient and the news' subject, you can also see the expiry date of the news

To read a news, select an entry in the list. The content will then be displayed in the lower part of the view.

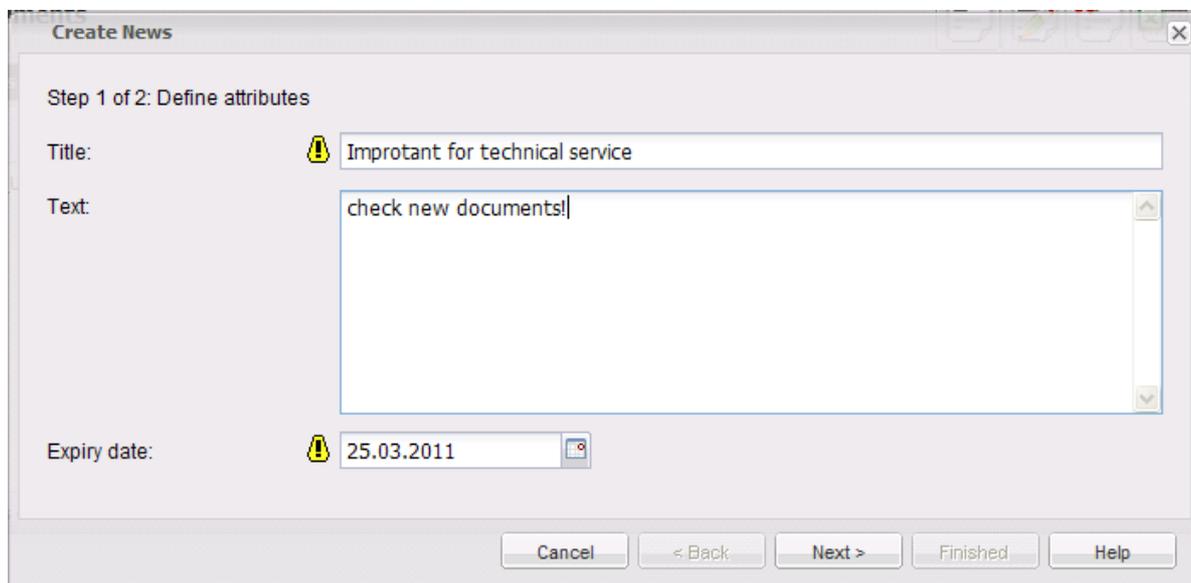
News can only contain text.

Operations on news can be performed using the context menu entries [New](#), [Edit](#), and [Delete](#) or by pressing the corresponding buttons.

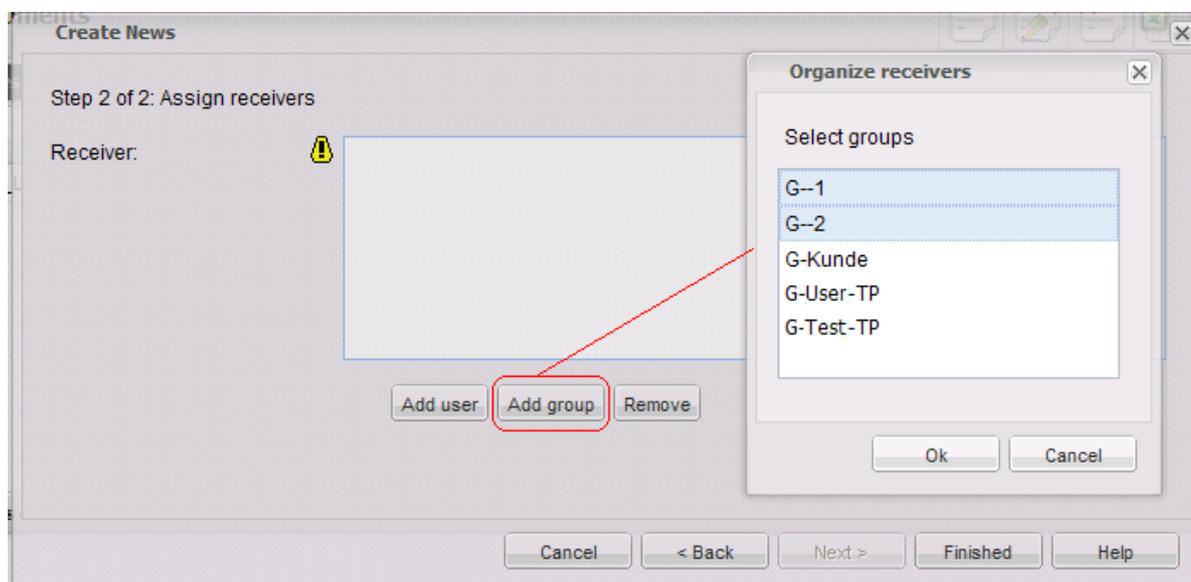
## 4.1 Create news

This feature helps you to create new news. Select *New* from the context menu or press the *New* button.

The *Create News* wizard opens:



In the first wizard page, you can enter title, text and the expiry date of the news. (Title and expiry date are mandatory fields.) After the expiry date, the news will not be displayed anymore.



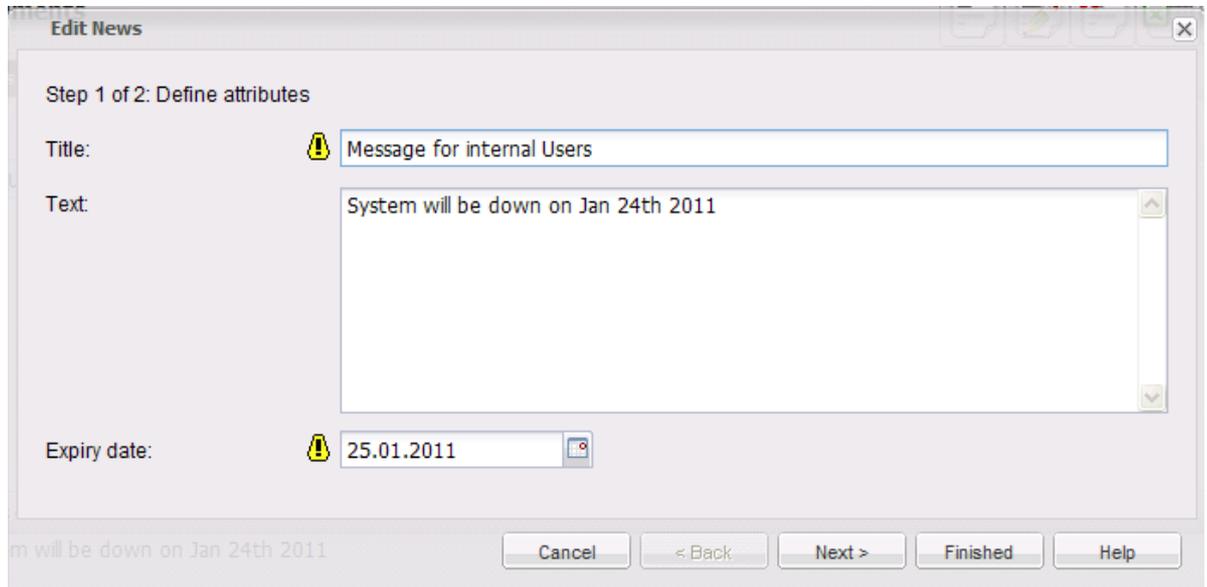
In the second wizard page, the recipients for the news are entered. Press the button *Add user* or *Add group* to open the list of all possible recipients for the News. Choose one or more recipients (users or groups).

Press *Finish* to save the news.

## 4.2 Edit news

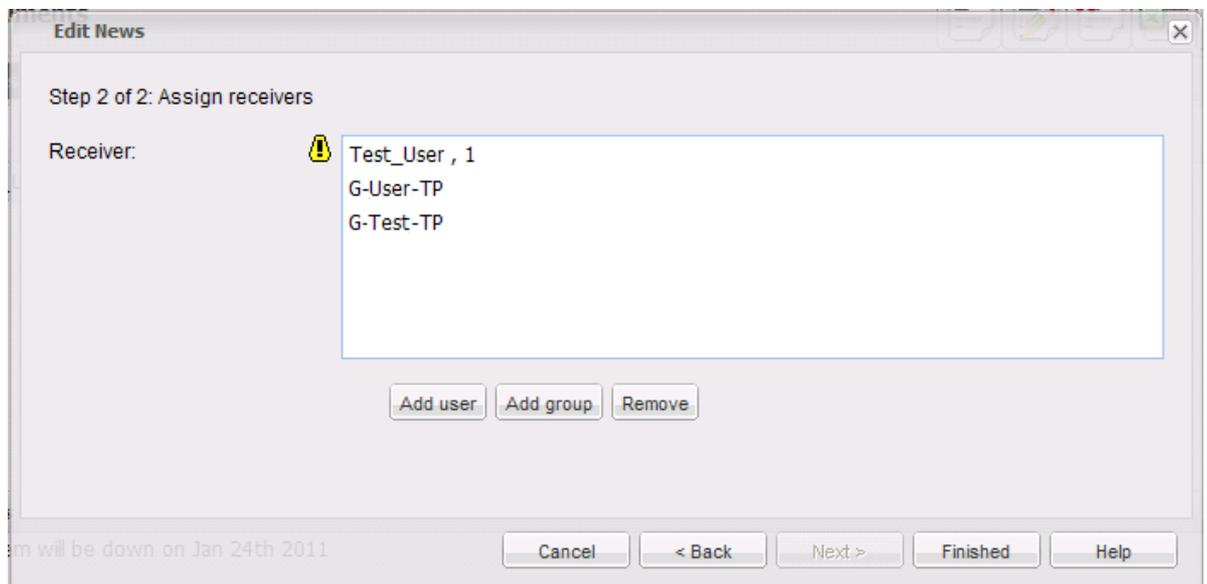
To change the data of existing news, select *Edit* from the context menu or press the *Edit* button.

Now you can change the news' data in the *Edit News* wizard.



The screenshot shows the 'Edit News' wizard window. The title bar reads 'Edit News'. The main content area is titled 'Step 1 of 2: Define attributes'. It contains three input fields, each with a yellow warning icon to its left: 'Title:' with the text 'Message for internal Users', 'Text:' with a text area containing 'System will be down on Jan 24th 2011', and 'Expiry date:' with the date '25.01.2011'. At the bottom of the window, there are five buttons: 'Cancel', '< Back', 'Next >', 'Finished', and 'Help'. A faint preview of the news text is visible at the bottom left of the window.

In the first wizard page, you can edit title, text and the expiry date of the news. (Title and expiry date are mandatory fields.) After the expiry date, the news will not be displayed anymore.



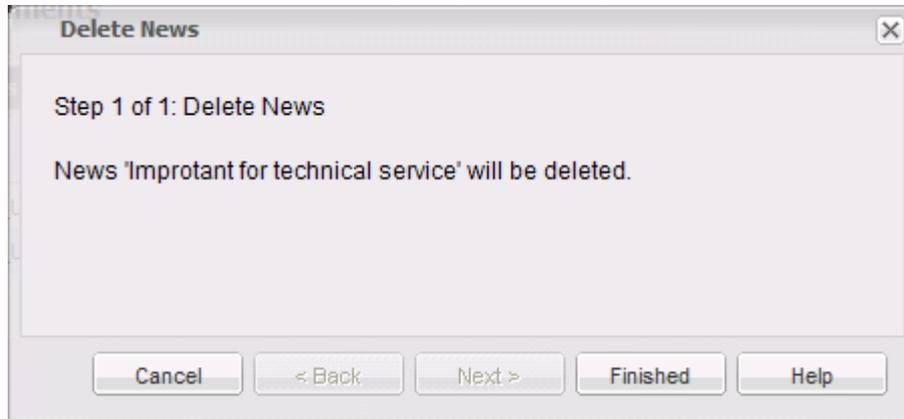
The screenshot shows the 'Edit News' wizard window at the second step. The title bar reads 'Edit News'. The main content area is titled 'Step 2 of 2: Assign receivers'. It features a 'Receiver:' label and a list box containing three entries: 'Test\_User , 1', 'G-User-TP', and 'G-Test-TP'. Below the list box are three buttons: 'Add user', 'Add group', and 'Remove'. At the bottom of the window, there are five buttons: 'Cancel', '< Back', 'Next >', 'Finished', and 'Help'. A faint preview of the news text is visible at the bottom left of the window.

In the second wizard page, the recipients for the news can be changed. Press the button *Add user* or *Add group* to open the list of all possible recipients for the News. Choose one or more recipients (users or groups). By selecting a news recipient and pressing *Remove* you can remove this recipient from the list.

The feature *Edit* is only active when a news is selected in the news list.

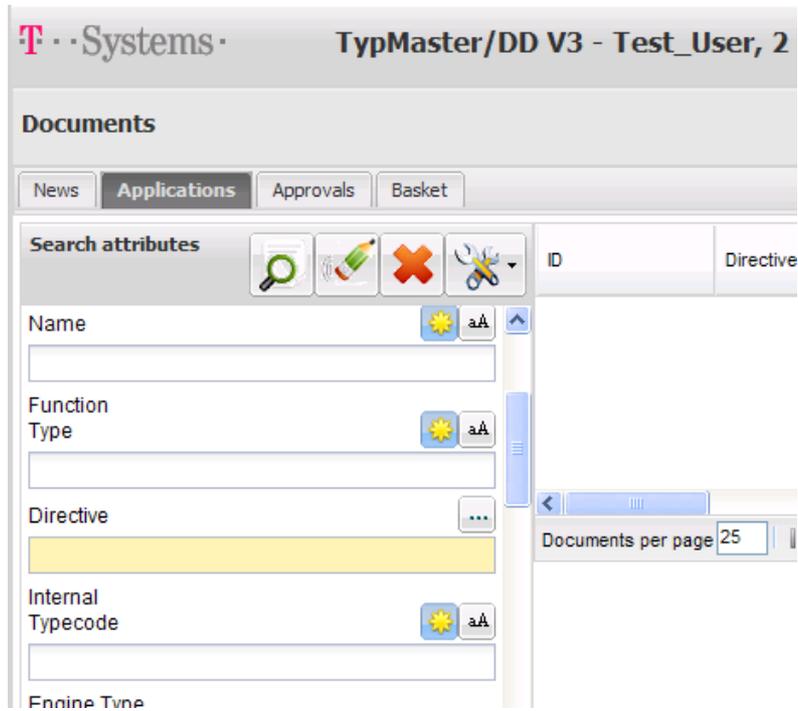
## 4.3 Delete news

Administrators and authors of news can delete these by selecting a news and selecting *Delete* from the context menu or press the *Delete* button. A confirmation prompt is made to prevent inadvertent deletions.



## 5 Archives

The available archives are shown as tabs:

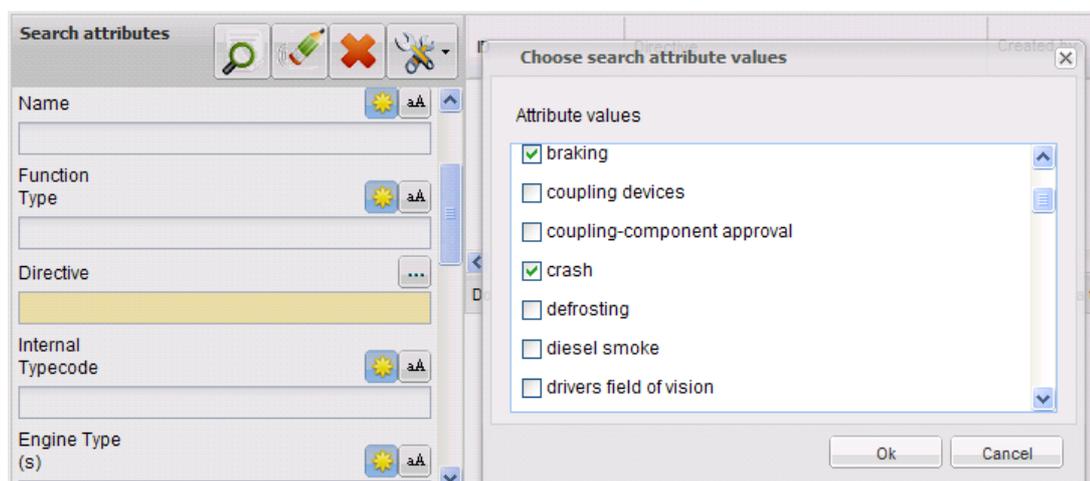


Select an archive by clicking on one of the tabs. The archive view will be displayed. Archives the user is not allowed to see are not displayed at all.

### 5.1 Searching

In an archive, the user can search for all visible documents (the user must have at least 'Read' rights on such a document). Search expressions can be entered in the search form fields in the left window area.

Fields that are colored yellow are selection fields. Clicking on the field will open a dialog where the attribute values can be selected from a list.





The search is started by pressing the *Search* button or by pressing the *Return* key. All documents matching the search criteria will be shown in the results table. If no documents can be found that match the search criteria, a message *No documents found* will be shown.

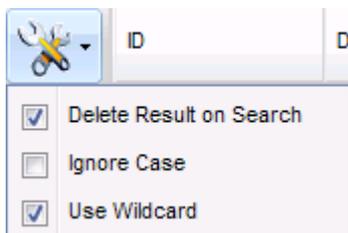


The button *Clear Search attribute fields* removes all data that the user has entered into the search fields.



Pressing the button *Reset search result* clears the displayed result list.

Using the *Search settings* menu button, the search can be configured:



#### **Option *Delete result on Search*:**

Checking this option results in the search result table being cleared before a new search is done. If this option is not checked, the results of a new search will be added to the results that are already displayed.

#### **Option *Ignore Case*:**

Checking this option means that for every text search attribute, the search will operate case insensitive, i.e. 'abc' will be considered as equal to 'AbC'. This setting can be overridden for individual text search attributes using the 'a=A' button or the menu item 'a=A' in the attribute label.

#### **Option *Use wildcard*:**

Checking this option means that for every text search attribute, the search will add wild cards to the search text that was entered, e.g. 'haus' will be considered as matching a value of 'Exhaust'. If this option is not checked, the search text that was entered must be exactly the same as the document's attribute value. This setting can be overridden for individual text search attributes using the '\*' button or the menu item '\*abc' in the attribute label.

## 5.2 Create document

There are two ways to create a new document:

### 5.2.1 Create a new document from scratch:

Press the *New* button or select *New document* from the context menu. A *New Document* wizard will open:

#### Step 1: Define part roles

For each category that is displayed, the concrete part role for the new document must be defined. (E.g. if the 'Technical Service 2' is to be used as the technical service for the application, 'TechnicalService2' must be selected for the category 'Technical Service'.)

If *multi selection is possible* for a category than more than one concrete part role of this category can be selected via click, shift+click and ctrl+click. (E.g. if the document is relevant for 'Vehicle Type R' and 'Vehicle Type X', both vehicle types have to be selected in the category 'Vehicle responsible')

If no or exactly one set of part roles is defined in the system configuration, this step will not be shown.

**Create Document**

**Step 1 of 4: Define part role sequence**

\_K\* Discipline

- \_T\* Lighting
- \_T\* Steering

\_K\* Vehicle responsible (Multi selection using ctrl/shift)

- \_T\* VehicleType A
- \_T\* VehicleType R
- \_T\* VehicleType X

\_K\*TechnicalService

- \_T\*TechnicalService1
- \_T\*TechnicalService2

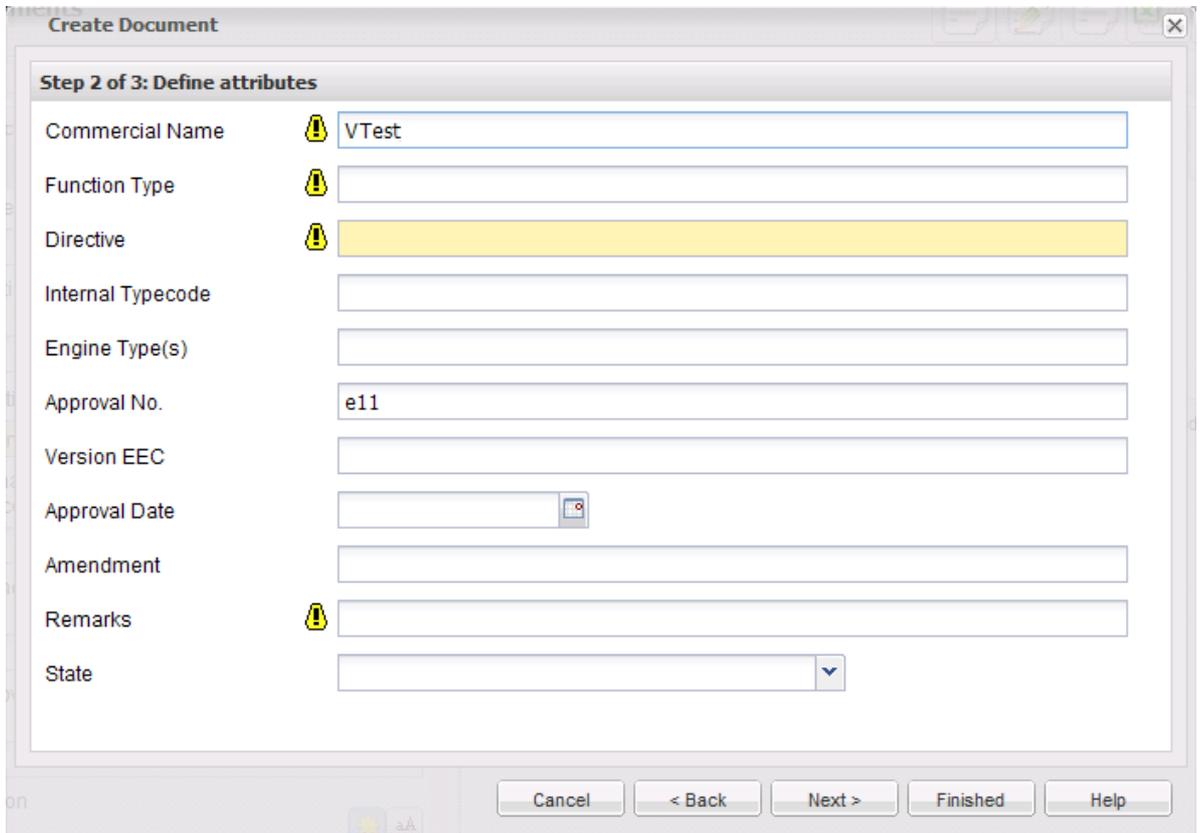
\_K\*ApprovalAuthority

- \_T\*Authority1
- \_T\*Authority2

Cancel < Back Next > Finished Help

## Step 2: Define attributes

The attributes for the document can be entered in this step. Mandatory attributes must be filled, optional attributes may be left blank.



The screenshot shows the 'Create Document' dialog box, Step 2 of 3: Define attributes. The dialog contains the following fields:

- Commercial Name: VTest
- Function Type: (empty)
- Directive: (empty)
- Internal Typecode: (empty)
- Engine Type(s): (empty)
- Approval No.: e11
- Version EEC: (empty)
- Approval Date: (empty)
- Amendment: (empty)
- Remarks: (empty)
- State: (empty)

Buttons at the bottom: Cancel, < Back, Next >, Finished, Help.

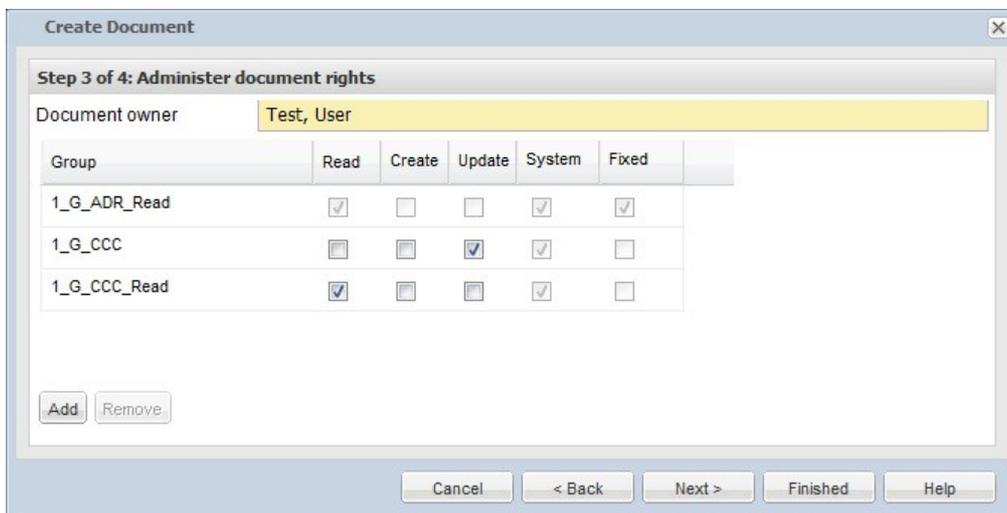
## Step 3: Administer document rights

The rights that have been defined for the selected set of part roles are already shown here as a default. Normally, it will not be necessary to change these rights. If there is no such default, the rights defined for the current archive will be used.

Use the buttons 'Add', 'Edit' and 'Remove' to change rights for selected user groups.

Rights that have been defined as fixed cannot be changed or removed.

If all rights that have been defined for the document are fixed, this step will not be shown.



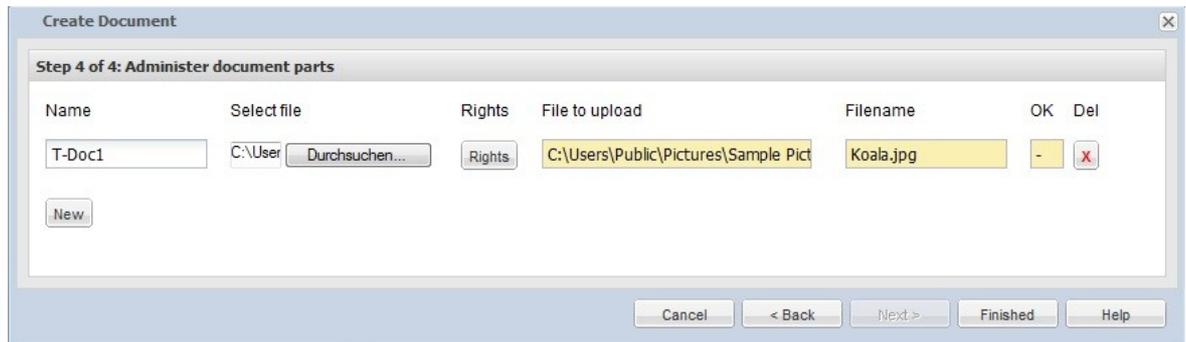
The screenshot shows the 'Create Document' dialog box, Step 3 of 4: Administer document rights. The dialog shows the following table of rights for the selected user group 'Test, User':

| Group        | Read                                | Create                   | Update                              | System                              | Fixed                               |
|--------------|-------------------------------------|--------------------------|-------------------------------------|-------------------------------------|-------------------------------------|
| 1_G_ADR_Read | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> |
| 1_G_CCC      | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |
| 1_G_CCC_Read | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input checked="" type="checkbox"/> | <input type="checkbox"/>            |

Buttons at the bottom: Add, Remove, Cancel, < Back, Next >, Finished, Help.

## Step 4: Administer document parts

Add document parts:



- enter a unique name for the document part
- press search and select the file to be uploaded as document part. Following the content of fields 'File to upload' and 'Filename' is updated automatically.
- to add an additional file press new. An extra line will be displayed where the data for another file upload can be entered.
- if one of these uploads should not be executed, the corresponding line can be deleted by pressing the delete button for this line.
- the rights of a document part can be edited by pressing the Rights button in the corresponding line (see [Change document part rights](#)).

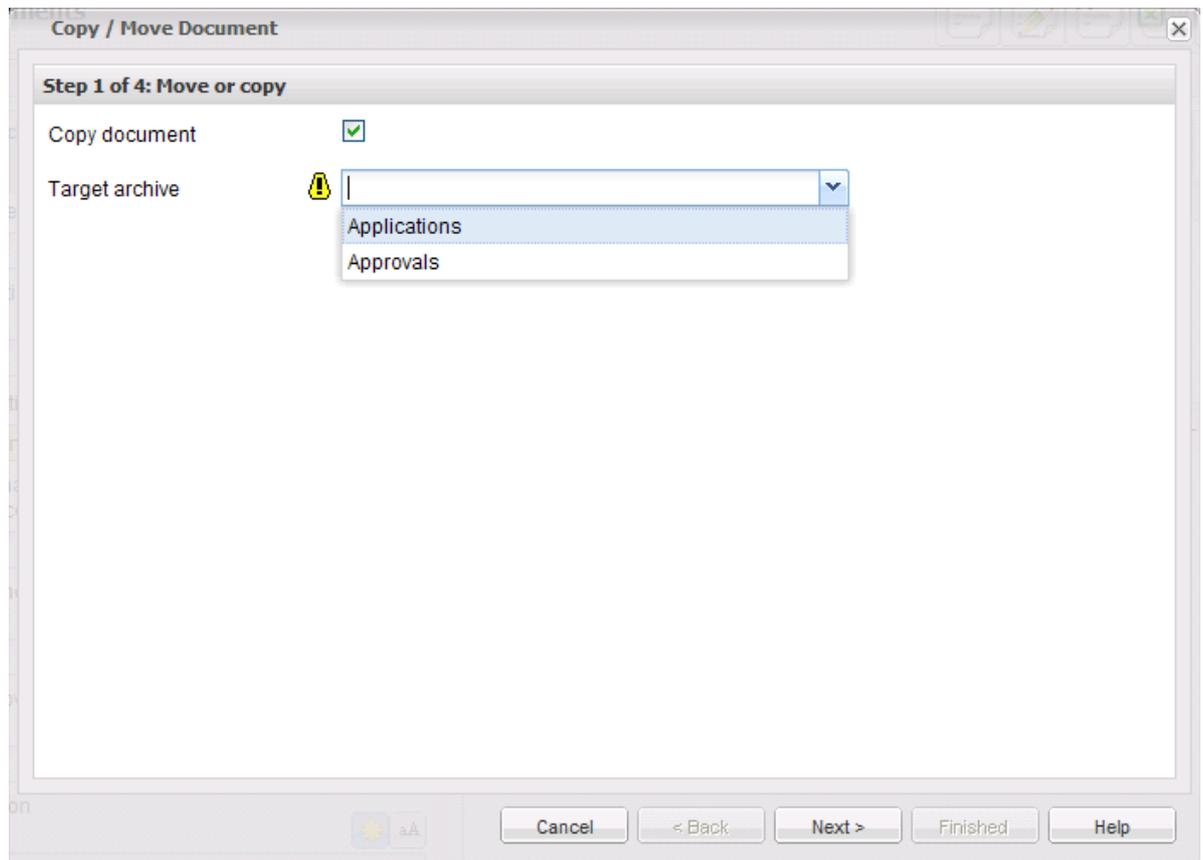
Save the document by pressing the 'Finished' button. The new document with its attributes, rights and document parts is created. The files for the document parts are uploaded and the data is stored in the database

## 5.2.2 Copy an existing document

This is done by selecting an existing document in the results table and selecting 'Copy/Move' from the context menu.

### Step 1: Define the target archive

Make sure that 'Copy document' is checked and select the target archive from the drop down list.



## Step 2: Edit attributes if needed

Mandatory attributes must be filled.

**Copy / Move Document**

**Step 2 of 4: Define attributes**

Commercial Name VTest

Function Type 99-818

Directive braking;

Internal Typecode

Engine Type(s)

Approval No. e11

Version EEC

Approval Date

Amendment

Remarks

State

February 2011

| S  | M  | T  | W  | T  | F  | S  |
|----|----|----|----|----|----|----|
| 30 | 31 | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |
| 13 | 14 | 15 | 16 | 17 | 18 | 19 |
| 20 | 21 | 22 | 23 | 24 | 25 | 26 |
| 27 | 28 | 1  | 2  | 3  | 4  | 5  |
| 6  | 7  | 8  | 9  | 10 | 11 | 12 |

Today

< Back Next > Finished Help

## Step 3: Administer document rights

This step is not available if only fixed rights are defined for the document.

**Copy / Move Document**

**Step 3 of 4: Administer document rights**

Document owner Test\_User, Tester33

| Group          | Read                                | Create                   | Update                              | System                   | Fixed                    |
|----------------|-------------------------------------|--------------------------|-------------------------------------|--------------------------|--------------------------|
| G_Test1_Update | <input type="checkbox"/>            | <input type="checkbox"/> | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> |
| G_Test2_Read   | <input checked="" type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/>            | <input type="checkbox"/> | <input type="checkbox"/> |

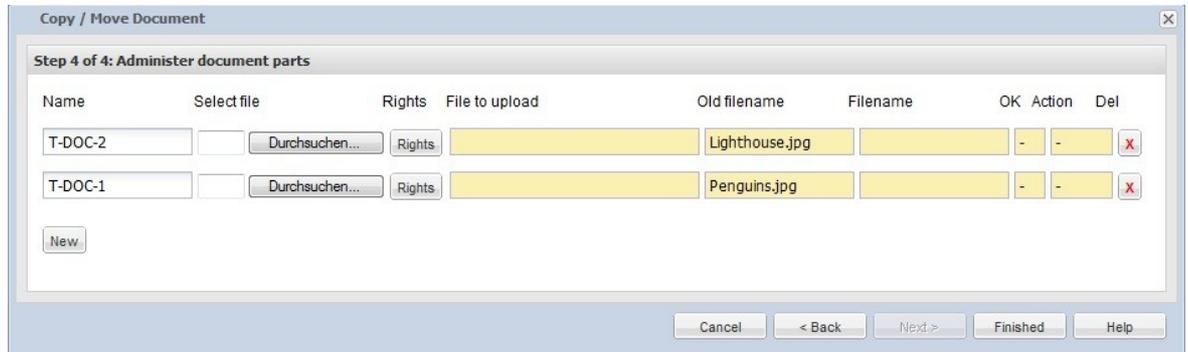
Add Remove

Cancel < Back Next > Finished Help

#### Step 4: Administer document parts

By default all document parts are transferred to the new archive as well. In this step new document parts can be added to the document and existing document parts can be deleted.

The rights for the document parts can be edited by pressing the rights button in the corresponding line.



## 5.3 Edit document

To edit an existing document, select it in the result table and select *Edit* from the context menu or press the *Edit* button.

### Step 1: Edit attributes

All attribute values can be edited. Mandatory attributes must be filled.

The screenshot shows a dialog box titled "Edit Document" with a close button (X) in the top right corner. The main area is titled "Step 1 of 2: Define attributes". It contains the following fields:

- Commercial Name: VTest (with a warning icon)
- Function Type: 99-818 (with a warning icon)
- Directive: braking; (with a warning icon and highlighted in yellow)
- Internal Typecode: (empty)
- Engine Type(s): (empty)
- Approval No.: e11
- Version EEC: (empty)
- Approval Date: (empty) with a calendar icon
- Amendment: 01
- Remarks: new braking system changed (with a warning icon)
- State: Request complete (dropdown menu)

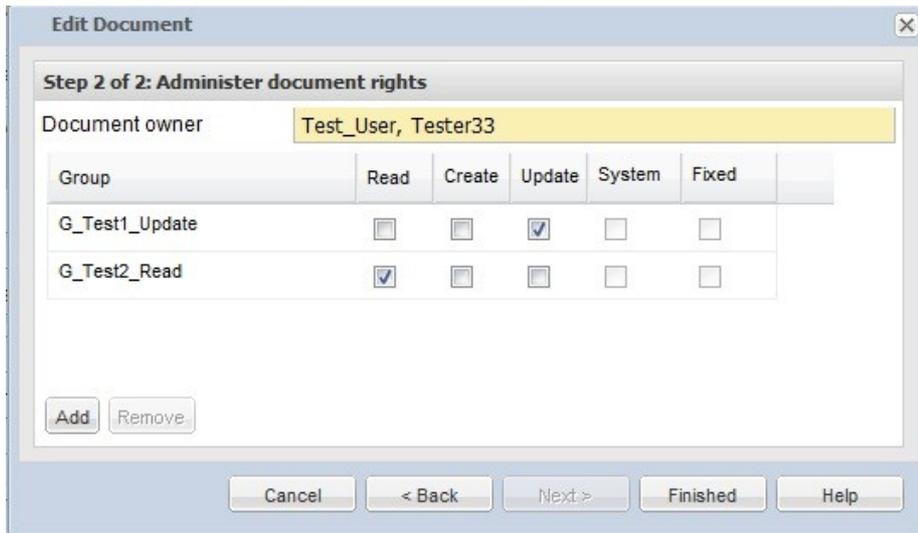
At the bottom, there are five buttons: "Cancel", "< Back", "Next >", "Finished", and "Help".

### Step 2: Administer document rights

The rights that are currently defined for the document are shown here. Use the buttons 'Add' 'Remove' to add or remove user groups in the table. To change the rights for a group use the check boxes in the table.

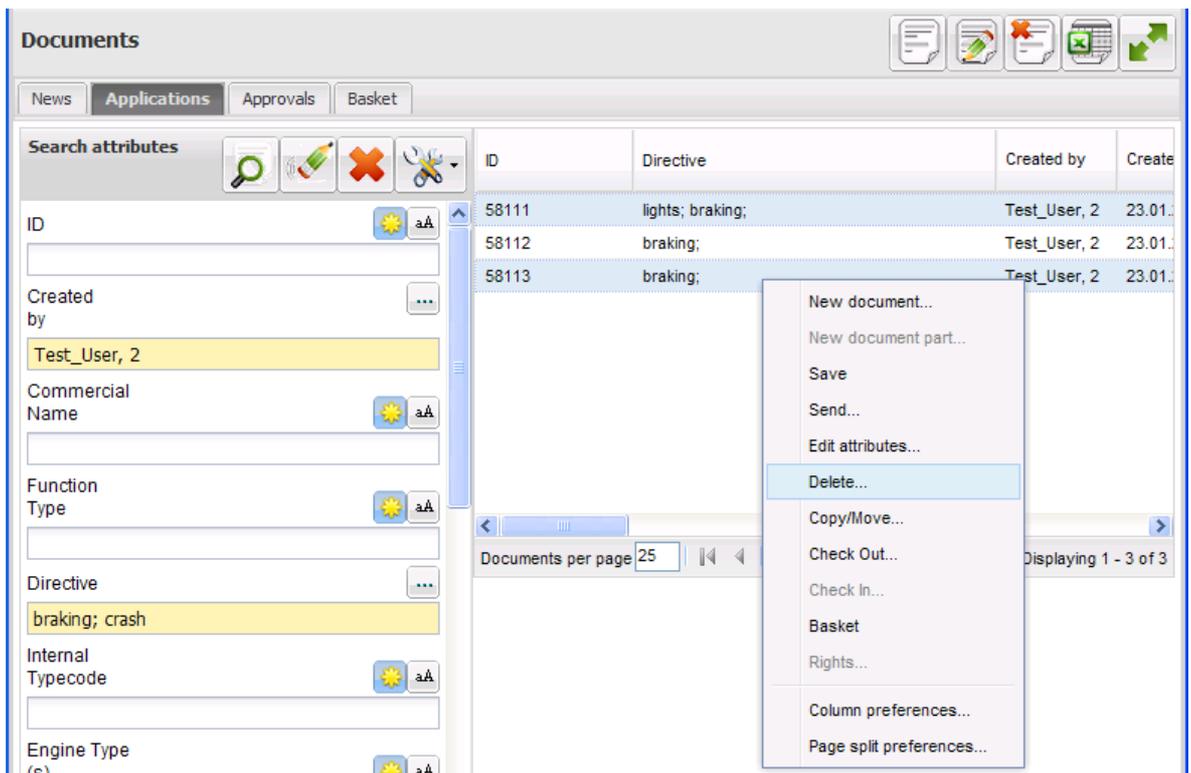
Rights that have been defined as fixed cannot be changed or removed.

If all rights that have been defined for the document are fixed, this step will not be shown.

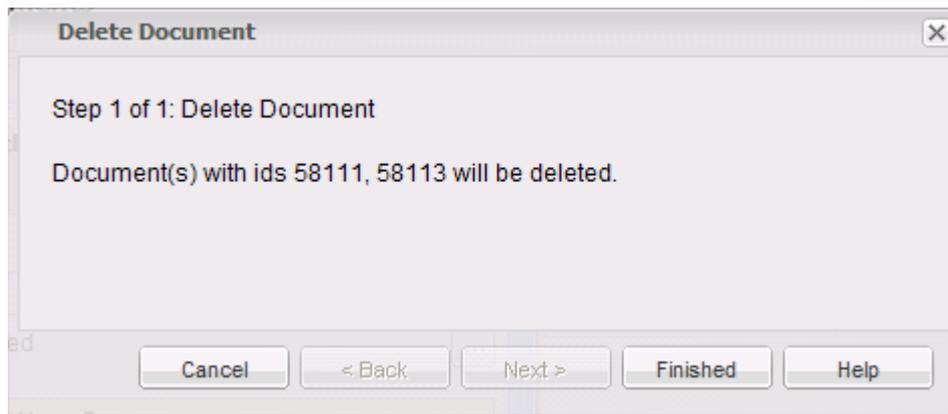


## 5.4 Delete document

To delete an existing document, select it in the result table and select *Delete* from the context menu or press the *Delete* button.



A confirmation prompt is opened to prevent inadvertent deletions.



To delete a document the user must have update rights for the document and its parts.

## 5.5 Save document

This function is used to save the document parts of the selected document(s) to a local storage. If there are no document part to save, the message 'Cannot save, there are no document parts' is displayed. The data is supplied as a Zip file with the document parts in directories that take the name of the document's id.

The browser opens a dialog showing the options

- Open
- Save
- Cancel

(Options may differ according to your local browser settings.)

Selecting 'Open' opens the zip file.

When selecting 'Save', the directory where the zip file should be stored must be chosen.

'Cancel' cancels the save action.

## 5.6 Checkout document

The *Checkout* function is used to save a document to a local storage and to lock the document so that it cannot be edited. As long as a document is checked out, it cannot be checked out once more. No changes to the document's attributes, rights or parts can be performed and the document itself and its parts cannot be deleted.

Documents that are checked out

- contain the name of the user that has performed the check out in the column *Checked out by*
- are shown in the search result table in a ***bold and italics*** type

| ID    | Directive                  | Created by   | Created at | Checked out ... | Approv |
|-------|----------------------------|--------------|------------|-----------------|--------|
| 56931 | <i>towing-device;</i>      | Vol, Vo      | 08.06.2010 | Test_User, 2    | e1     |
| 57431 | <i>engine performance;</i> | SYSADM, S... | 14.10.2010 | SYSADM, S...    |        |
| 57695 | <i>towing-device;</i>      | SYSADM, S... | 29.10.2010 | SYSADM, S...    |        |
| 56911 | exhaust emission;          | Vol, Vo      | 08.06.2010 |                 |        |
| 56973 | exhaust emission;          | Admin, Vier  | 09.06.2010 |                 |        |
| 57153 | exhaust emission;          | A1XYZ, A1A   | 01.09.2010 |                 |        |

### Check Out operation:

Select one (or several) document(s) in the result table.

Choose *Check Out* from the context menu. This causes the Check Out wizard dialog to open:

**Check out Document**

Step 1 of 1: Check out Document

Comment: check out for approval

Store document parts:

Buttons: Cancel, < Back, Next >, Finished, Help

You can enter a comment that tells other users why the document(s) have been checked out. This comment is optional.

If you already have a local copy of the document or if you only plan to add new document parts, you can remove the check mark for Store document parts.

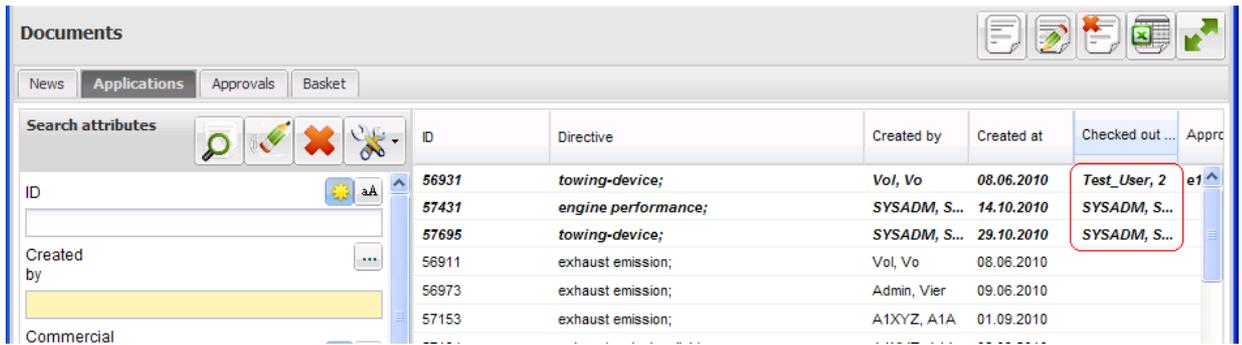
Then the document will only be locked but will not be saved locally.

## 5.7 Checkin document

The Checkin function is used to move local changes to document parts back to the archive. This function is permitted only if the document is checked out.

Documents that are checked out

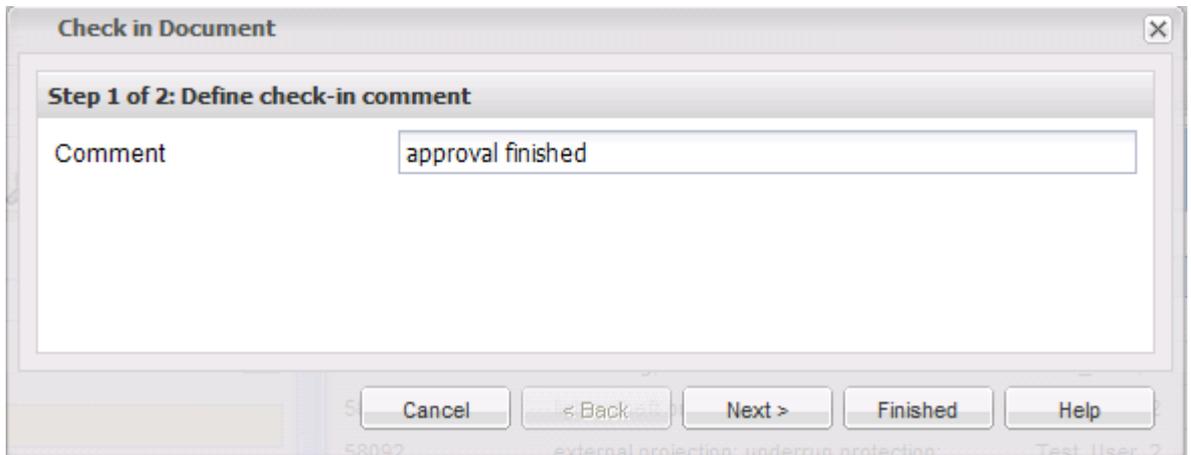
- contain the name of the user that has performed the check out in the column *Checked out by*
- are shown in the search result table in a ***bold and italics*** type



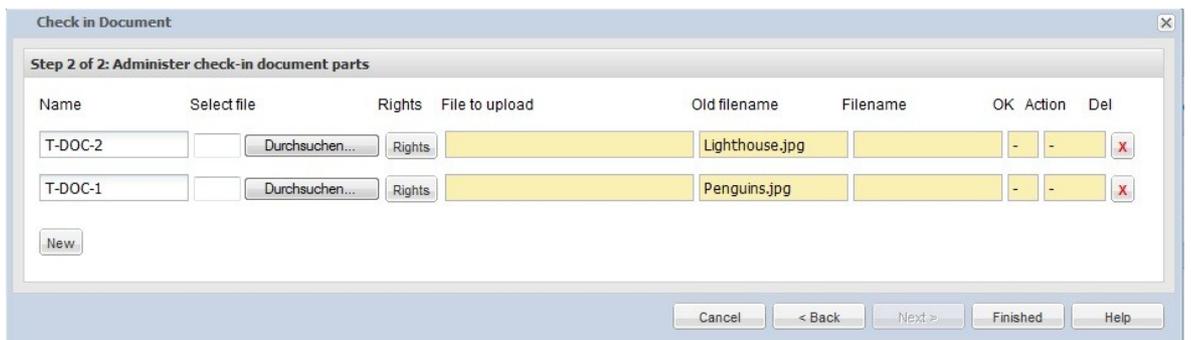
### Check In operation:

Select a document in the result table.

Choose *Check In* from the context menu. This causes the Check In wizard dialog to open:



You can enter a comment that tells other users what changes have been made to the document (step 1). This comment is optional.



In step 2, the document parts can be administrated using the *Search*, *Rights*, and *Delete* actions that are described in detail in the section on document parts.

## 5.8 Copy/move document

Using this function you can make a copy of a document in the current or another archive or move the document to another archive.

In the first step, you must decide whether you want to copy or move the document and select the target archive.

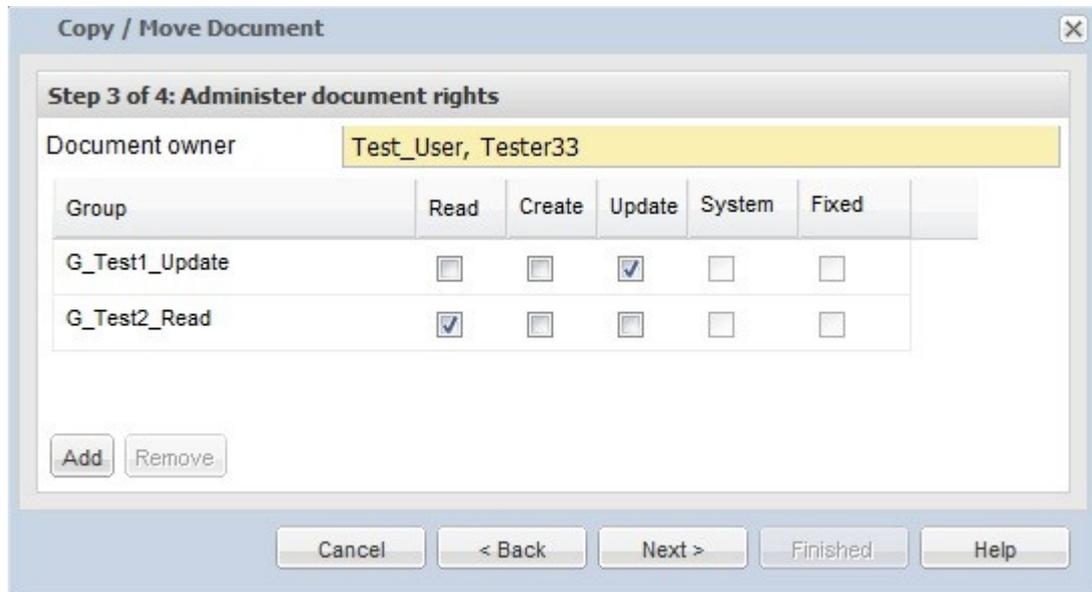
The screenshot shows a dialog box titled "Copy / Move Document" with a close button (X) in the top right corner. The main area is titled "Step 1 of 4: Move or copy". It contains two fields: "Copy document" with a checked checkbox and "Target archive" with a dropdown menu. The dropdown menu is open, showing "Applications" and "Approvals" as options. At the bottom, there are buttons for "Cancel", "< Back", "Next >", "Finished", and "Help".

The second step is used to complete or edit the document's attributes.

The screenshot shows the same dialog box, now at "Step 2 of 4: Define attributes". It contains several input fields with warning icons (yellow triangles) next to them: "Commercial Name" (VTest), "Function Type" (99-818), "Directive" (braking;), "Approval No." (e11), "Amendment", "Remarks", and "State". A calendar widget is open over the "Approval Date" field, showing February 2011 with the 23rd selected. At the bottom, there are buttons for "< Back", "Next >", "Finished", and "Help".

Attributes that the source and the target archive have in common are filled with the source document's values automatically.

The document rights for selected user groups can be managed (added, changed or removed) in the third step. This is done using the buttons *Add*, *Edit* and *Remove*.



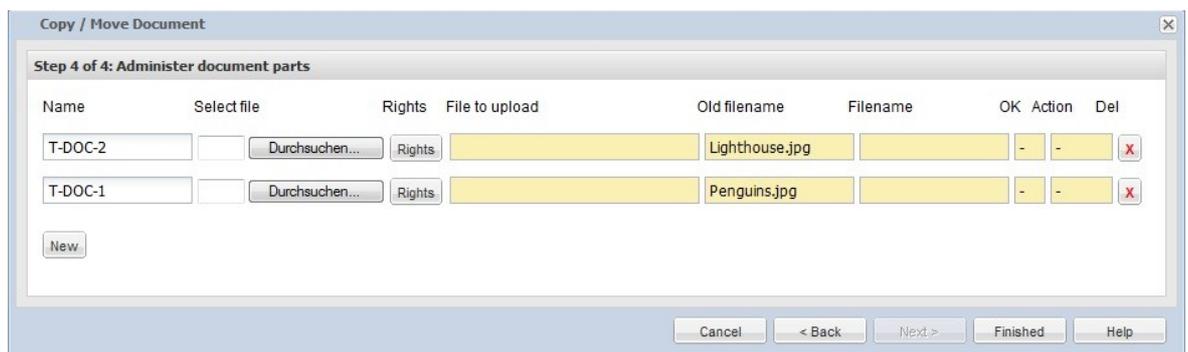
Rights that have been defined as fixed cannot be changed or removed.

If all rights that have been defined for the document are fixed, this step will not be shown.

Step four is used for managing the document parts

By default all document parts are copied to the new document as well. In this step new document parts can be added to the document and existing document parts can be deleted.

The rights for the document parts can be edited by pressing the rights button in the corresponding line.



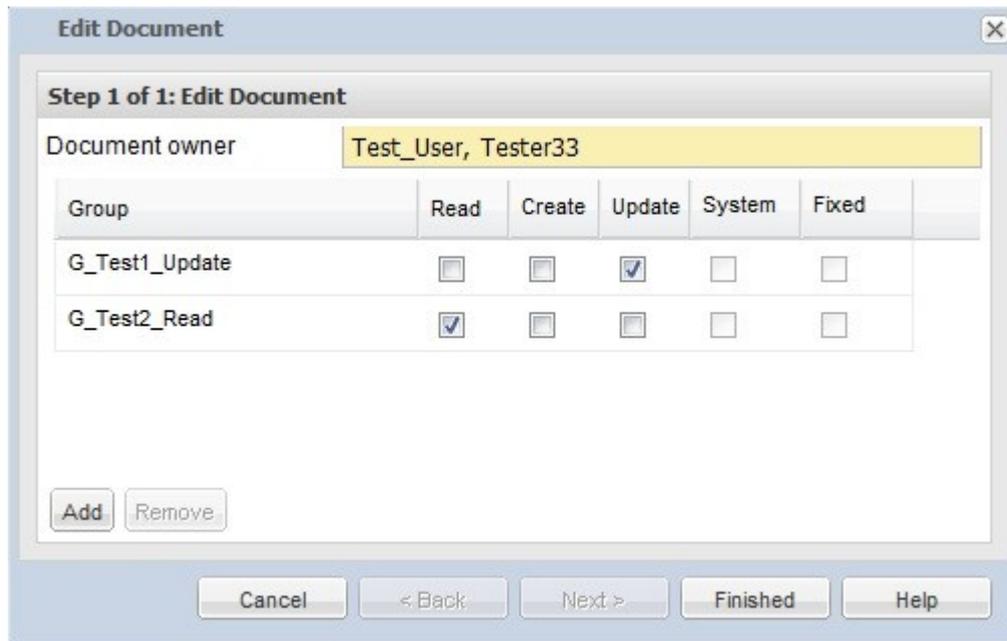
## 5.9 Change document rights

This function is used to change the rights that are defined for the current document:

Rights can only be assigned to user groups, not to individual users.

If a user is a member of a user group which has been assigned a certain right, the wording 'a user has the right' is also used.

In this dialog window all user groups are shown that have been assigned rights to the current document.



The following rights can be assigned:

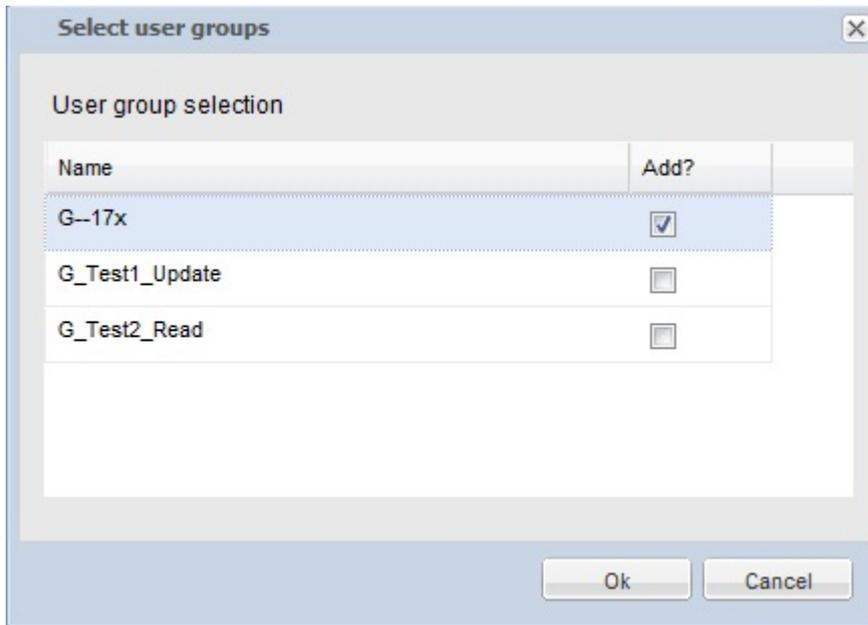
| Right  | Meaning  |
|--------|--|
| READ   | The document can be found by a search, its attributes are displayed in the result table. It may not be changed or deleted, no new document parts may be created. |
| CREATE | New document parts may be created for the document, but existing document parts may not be changed or deleted.   |
| UPDATE | All operations are allowed.  |

A user who has none of the rights listed here will never see the document in question.

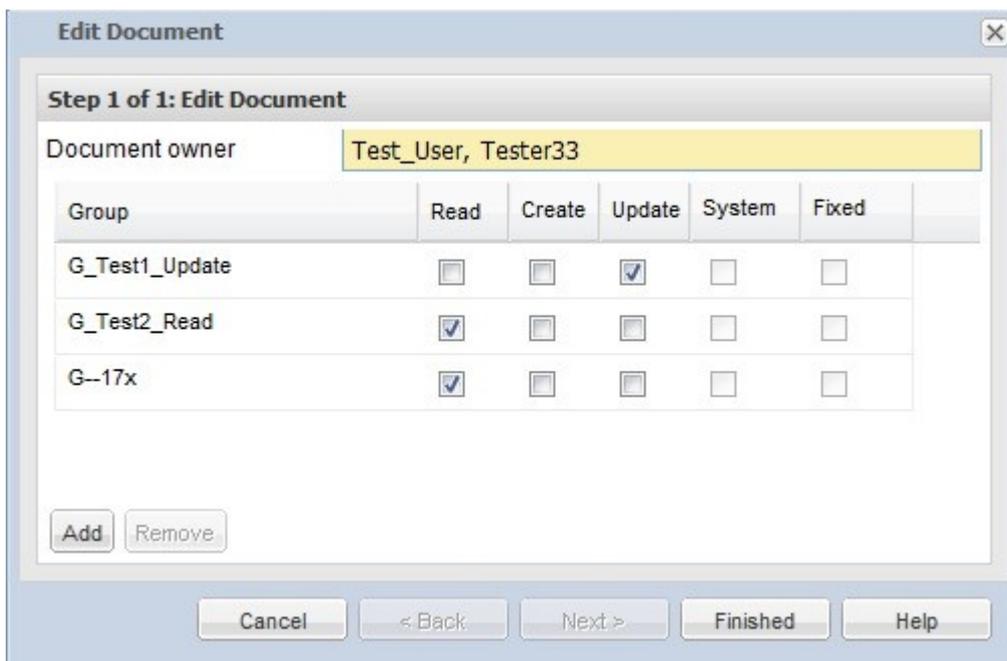
Each document part can be assigned its own set of rights which may differ from the document rights.

Thus the situation may occur that a user may see the document itself but has no rights for some of the document parts. In this case, those document parts will not be visible for the user.

Rights for additional groups are assigned by pressing the button *New*. A dialog opens where the user groups may be selected.



Pressing OK closes the dialog and adds the selected groups with the right read to the table.



The right for a group is changed by activating the adequate checkbox in the table.

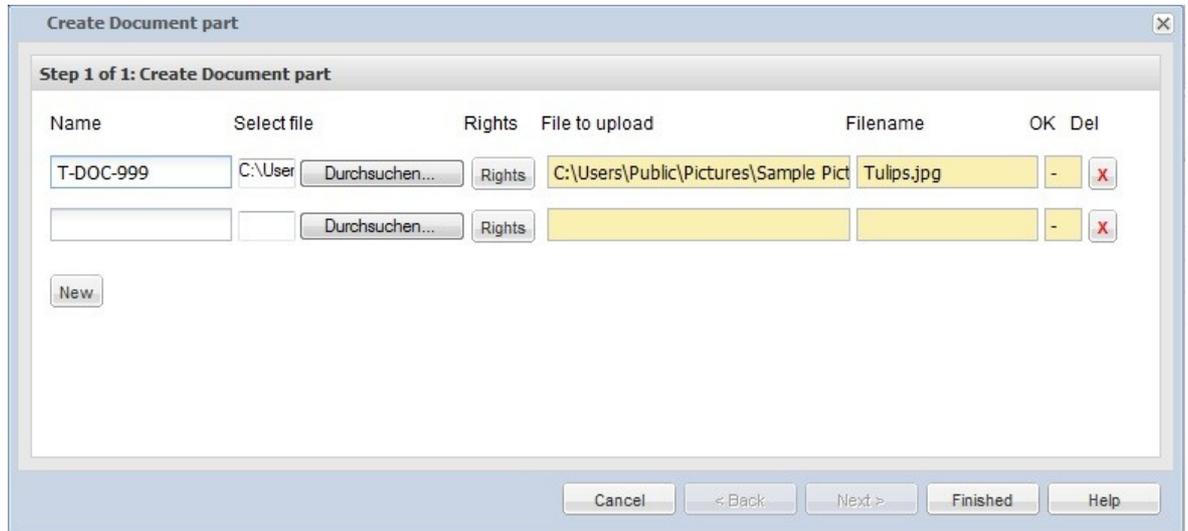
Removing the rights for selected groups is done by pressing *Remove*.

If all rights that have been defined for the document are fixed, changing the document rights is not possible.

## 5.10 Add document part

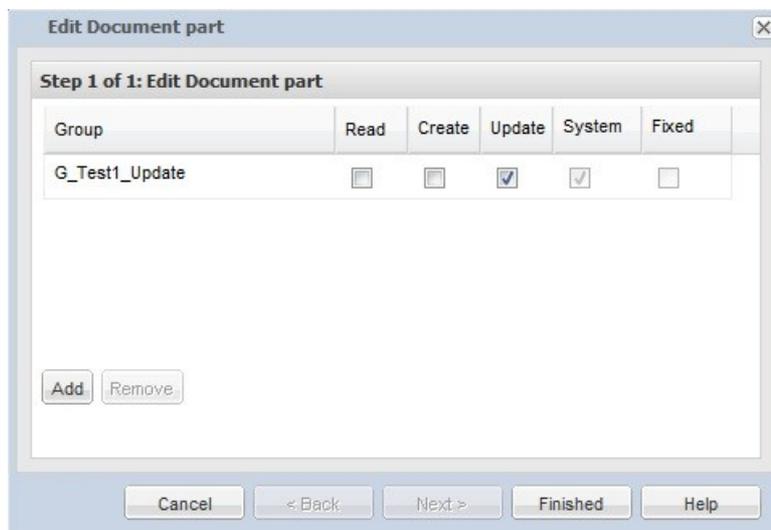
Using this function new document parts (files) can be added to a document that already exists in an archive.

For a selected document, clicking the *New* button or choosing *New document part* from the context menu will open the *Create document part* wizard.



- enter a unique name for the document part
- press search and select the file to be uploaded as document part. Following the content of fields 'File to upload' and 'Filename' is updated automatically.
- to add an additional file press new. An extra line will be displayed where the data for another file upload can be entered.
- if one of these uploads should not be executed, the corresponding line can be deleted by pressing the delete button for this line.

Each document part can be assigned different rights. This is done by clicking the Rights button in the corresponding line.



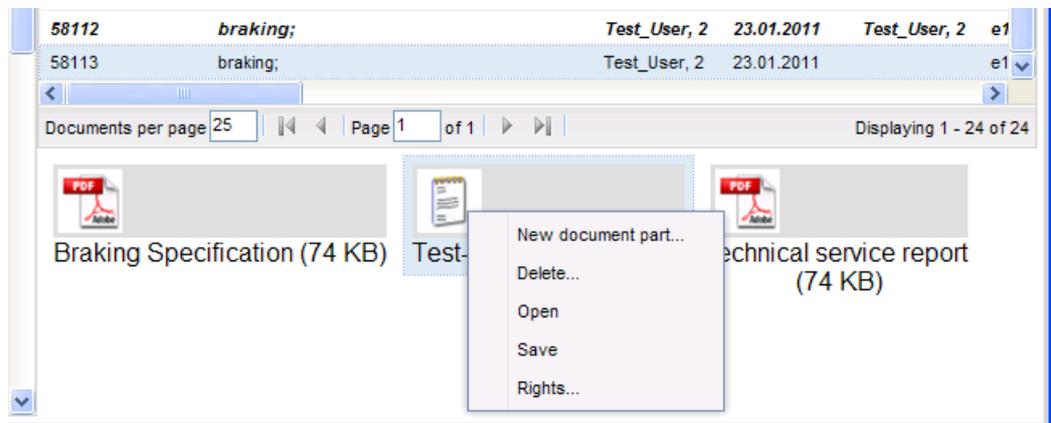
Rights can be added, changed or deleted. By assigning different rights for different document parts it can be accomplished that all necessary document parts are included in a document but the users can see or edit only those document parts that are meant for them.

Click *Finish* to confirm the operation.

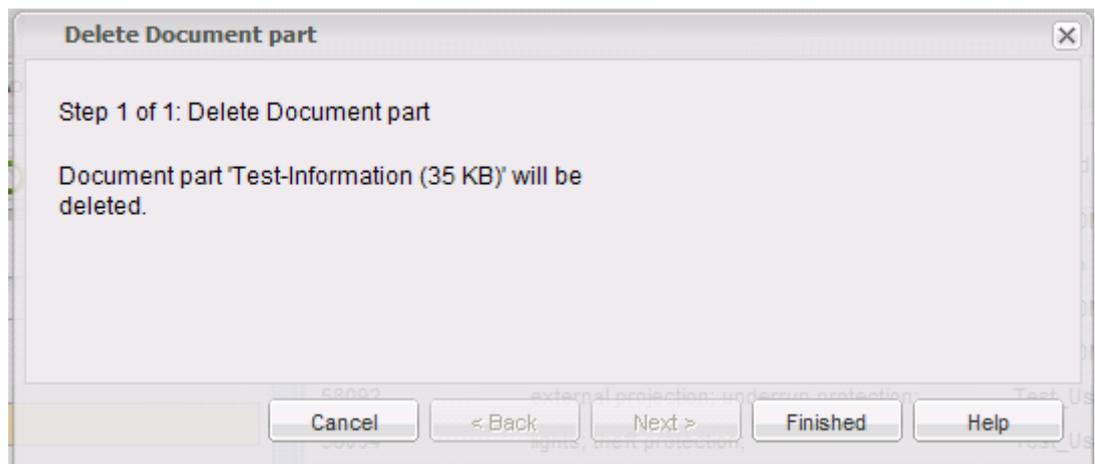
## 5.11 Delete document part

To delete a document part,

- in the result table, select the document that you want to delete a document part from,
- in the lower part of the view, select the document part to be deleted,
- click the *Delete* button or choose *Delete* from the document part's context menu,

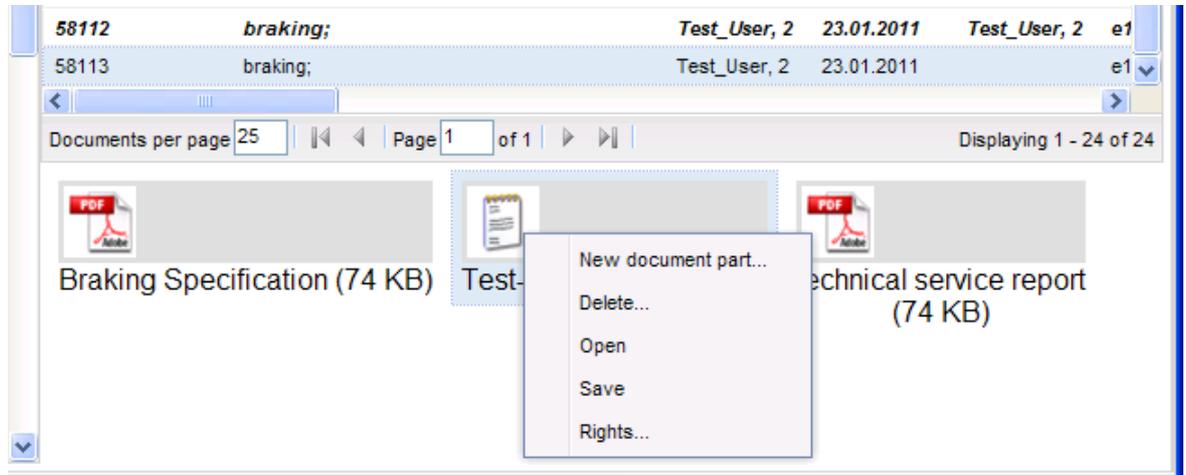


- click *Finish* in the confirmation prompt that opens and the document part will be deleted. (*Cancel* will bring you back to where you started.)



## 5.12 Show document part

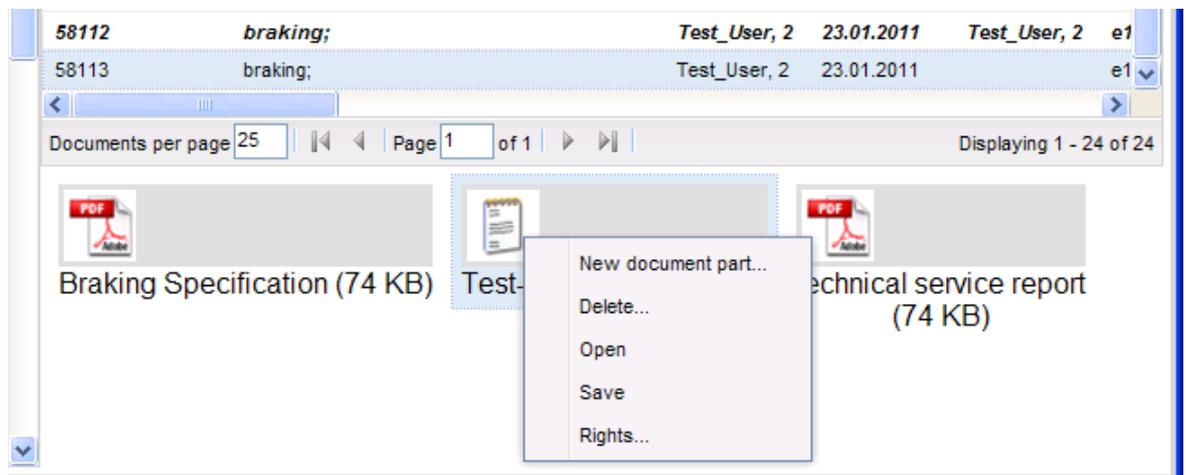
Choose *Open* from the context menu of a selected document part to open the document part's file.



The browser's functionality for opening a file is used for this. What precisely happens next depends on the browser, the browser settings (especially security settings) and the type of the file that is to be shown.

## 5.13 Save document part

Choose *Save* from the context menu of a selected document part to store the document part's file locally.



The browser's functionality for downloading and storing a file is used for this. What precisely happens next depends on the browser, the browser settings (especially security settings) and the type of the file that is to be shown.

## 5.14 Change document part rights

This function is used to change the rights that are defined for the current document part.

Rights can only be assigned to user groups, not to individual users.

If a user is a member of a user group which has been assigned a certain right, the wording 'a user has the right' is also used.

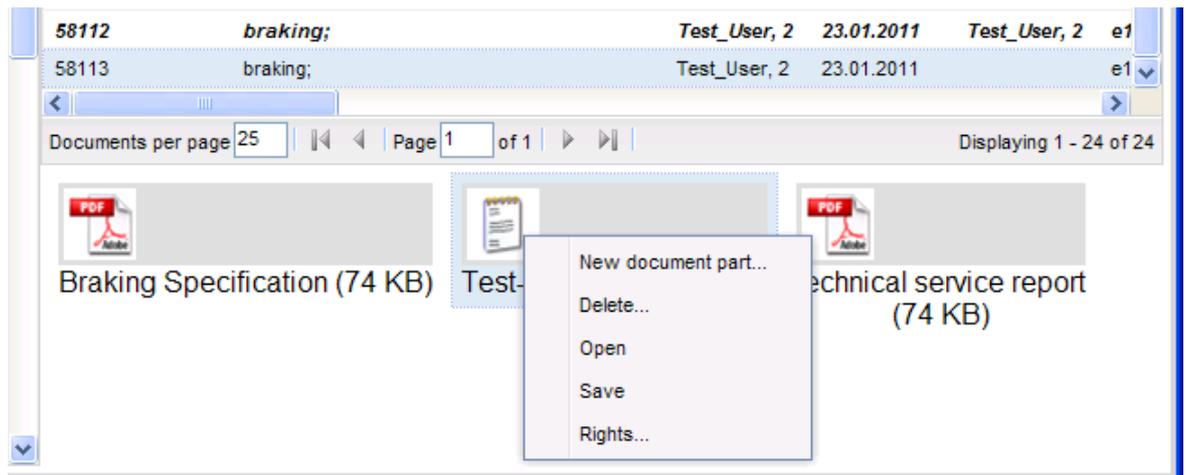
In this dialog window all user groups are shown that have been assigned rights to the current document.

The following rights can be assigned:

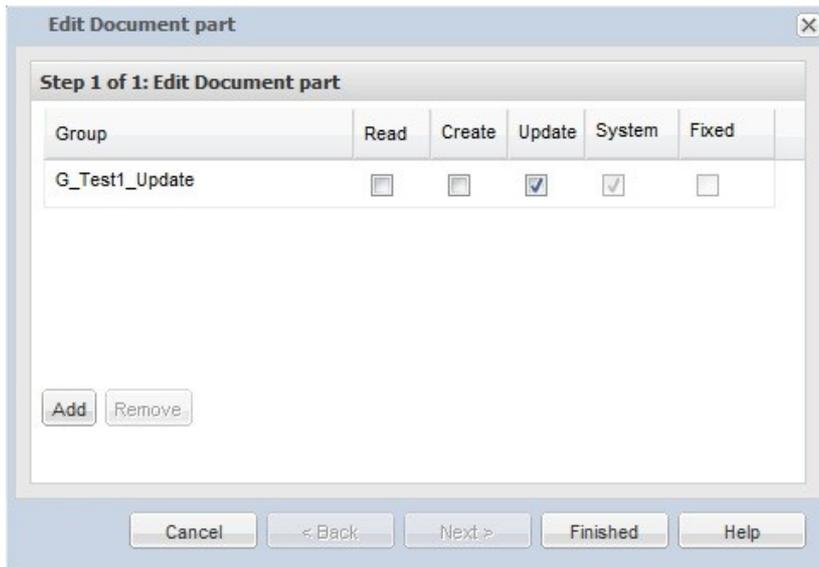
| Right  | Meaning  |
|--------|--|
| READ   | The document part may be shown and read. It may not be changed or deleted. |
| CREATE | <i>No meaning for document parts.</i>                                      |
| UPDATE | All operations are allowed.  |

A document part will not be shown to a user who has none of the rights listed here.

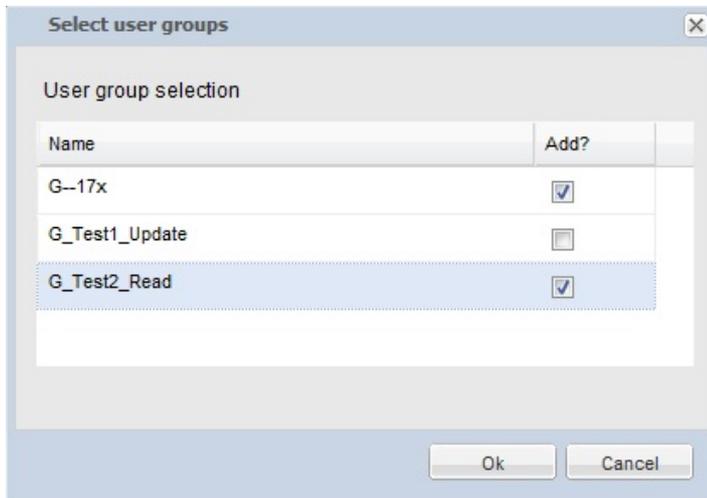
The document parts of a selected document are shown in the lower part of the view.



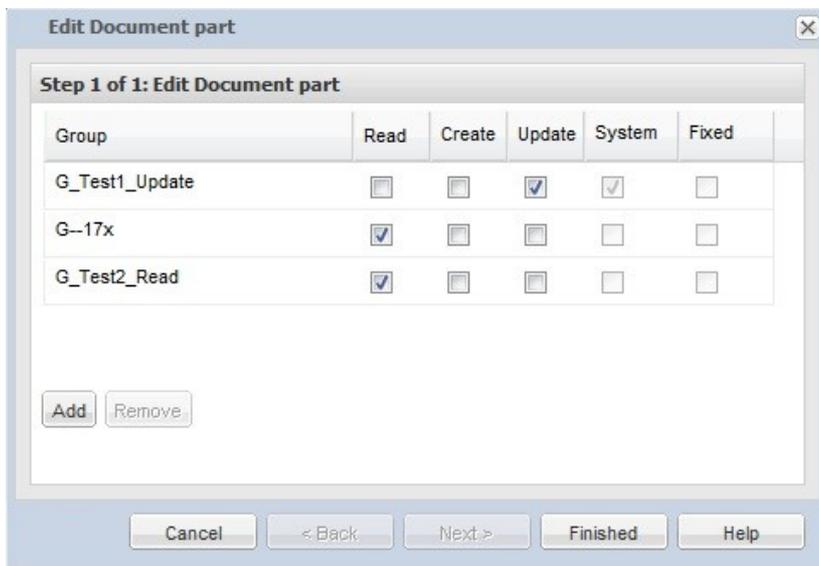
To change the rights of a document part, select it and choose *Rights* from its context menu.



Rights for additional groups are assigned by pressing the button *New*. A dialog opens where the user groups may be selected.



Pressing OK closes the dialog and adds the selected groups with the right read to the table.



The right for a group is changed by activating the adequate checkbox in the table.

Removing the rights for selected groups is done by pressing *Remove*.

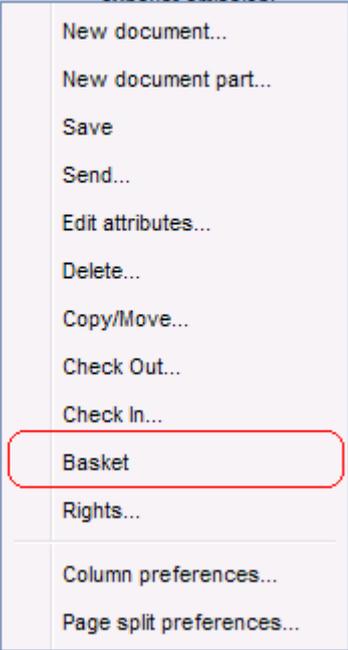
If all rights that have been defined for the document are fixed, changing the document part rights is not possible.

## 5.15 Put document to basket

This function is used to put documents from different archives to the [Basket](#) tab.

It is invoked by choosing Basket from the document's context menu. Now the document is listed in the Basket tab as well as in its archive's result table. Several selected documents can be put to the basket together.

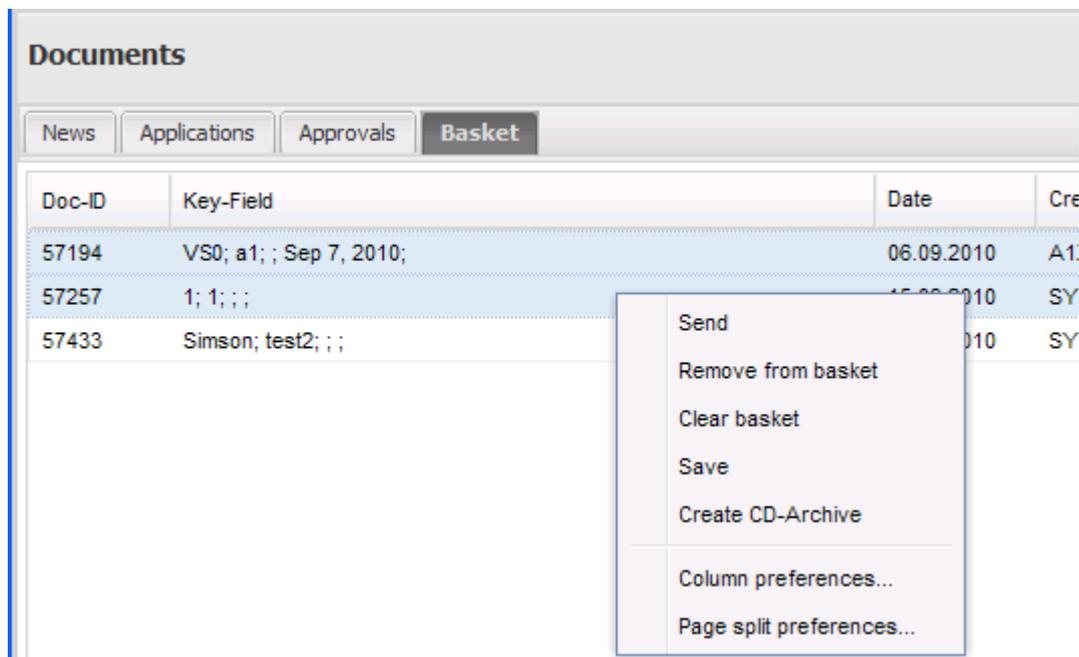
| ID           | Directive                 |
|--------------|---------------------------|
| 57153        | exhaust emission;         |
| 57194        | exhaust emission; lights; |
| 57256        | exhaust emission;         |
| 57257        |                           |
| 57311        |                           |
| 57373        |                           |
| <b>57431</b> |                           |
| 57433        |                           |
| 57531        |                           |
| <b>57695</b> |                           |
| 57711        |                           |
| 57893        |                           |
| 57894        |                           |
| 57931        |                           |
| 58092        |                           |
| 58094        |                           |
| 58095        |                           |
| 58111        | lights; braking;          |
| <b>58112</b> | <b>brakina:</b>           |



- New document...
- New document part...
- Save
- Send...
- Edit attributes...
- Delete...
- Copy/Move...
- Check Out...
- Check In...
- Basket**
- Rights...
- Column preferences...
- Page split preferences...

## 6 Basket

In the basket you can collect documents from different archives and carry out the actions [Store](#), [Send by email](#) or [Create CD archive](#) on all of them together.

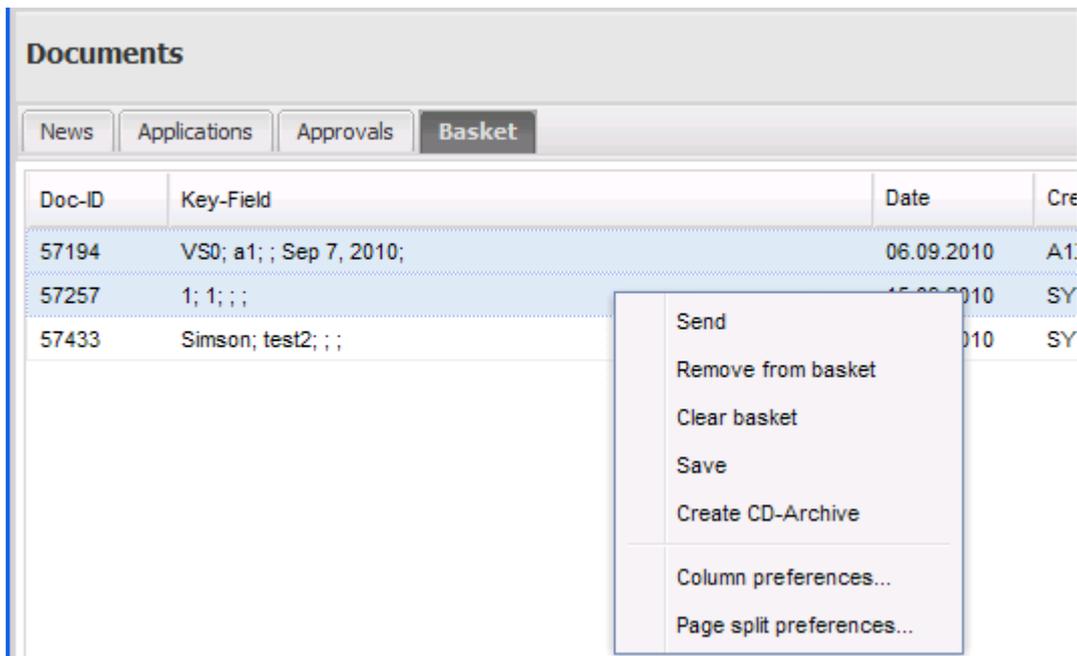


Documents that are shown in the result table of an archive tab, can be put to the basket, where the aforementioned actions can be carried out. Furthermore, documents can be [removed from the basket](#) again and the [basket can be emptied](#).

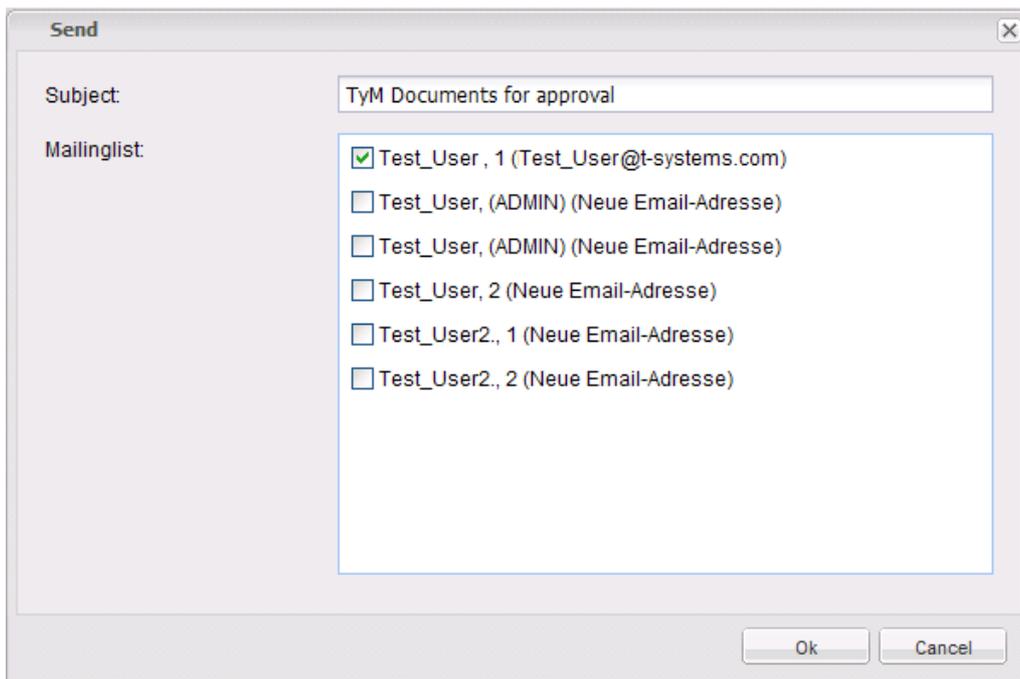
### 6.1 Send basket

This function is used to send documents with their document parts via email. If the documents to be sent don't contain document parts, then an error message 'Cannot save. There are no document parts.' is shown and no email is sent.

The user can send individual documents with document parts or several documents at once. Select the documents that are meant to be sent and choose *Send* from the context menu.



This will open the Send dialog window where the email subject must be entered and the email recipients must be selected from a list. Clicking OK confirms sending the email(s).



The email(s) contain the document attributes. To avoid unnecessarily large emails,

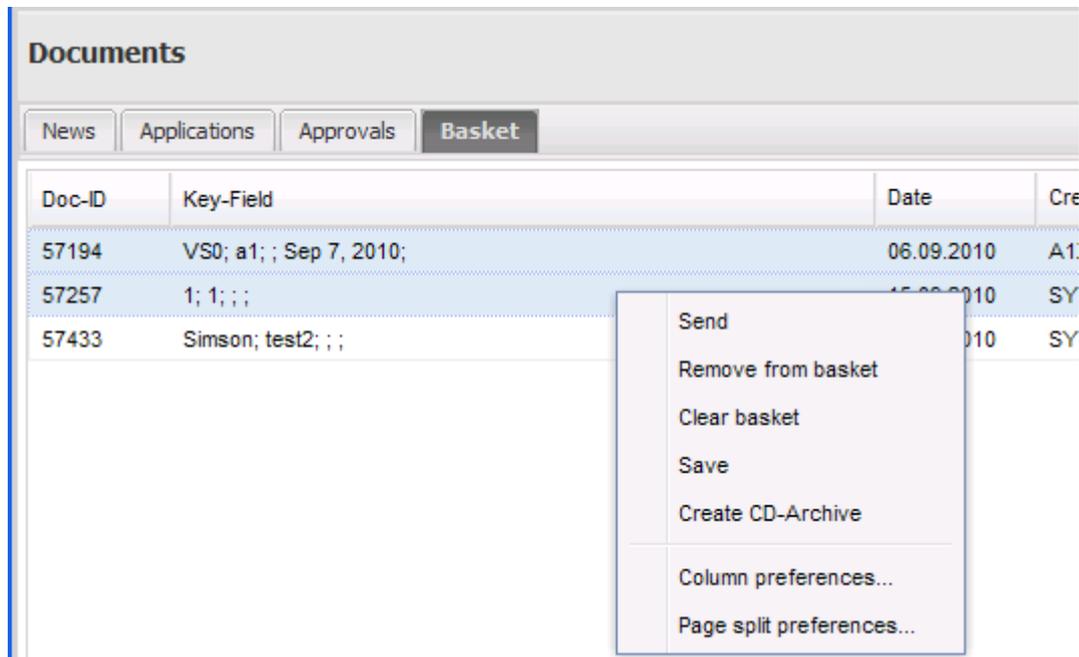
- each document is sent in a separate email
- the document parts are attached to the email in a zip file

**Please note:**

Send basket is only fully available if this function has been activated in the configuration of the system.

## 6.2 Store basket

This function is used to save the document parts of the selected document(s) in the basket to a local storage. If there are no document parts to save, the message ,Cannot save, there are no document parts' is displayed. The data is supplied as a Zip file with the document parts in directories that take the name of the document's id.



The browser opens a dialog showing the options

- Open
- Save
- Cancel

(Options may differ according to your local browser settings.)

Selecting ,Open' opens the zip file.

When selecting ,Save', the directory where the zip file should be stored must be chosen.

'Cancel' cancels the save action.

## 6.3 Create CD archive from basket

This feature stores all the data and documents to a local file that are necessary to create a CD with an offline version of the Document Distribution Application.

### Step 1

All documents that are to be stored on CD must be [put to the basket](#). Documents from any number of archives can be put to the basket.

### Step 2

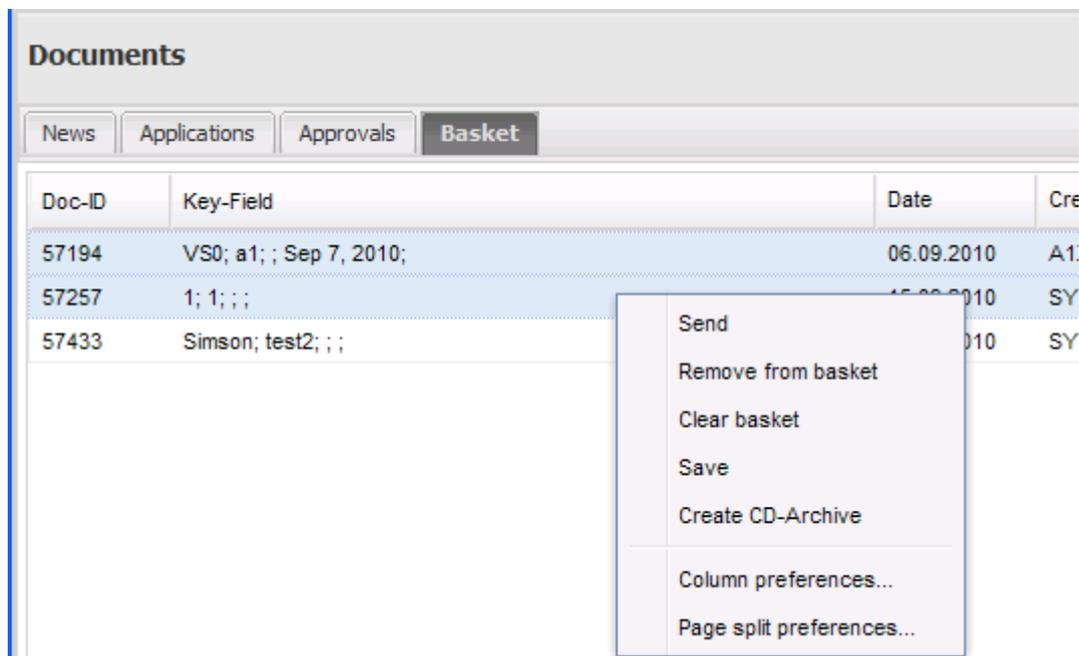
Now change to the archive tab, select all documents to be exported and choose Create CD-archive from the context menu. A zip archive is created that contains all files for the CD archive. This may take some time, as the files from all the document parts must be read from the archives and stored locally.

### Step 3

All files from the zip file created in step 2 must be copied to a CD (using a CD writer program) or another medium. This concludes the CD archive creation.

## 6.4 Remove document from basket

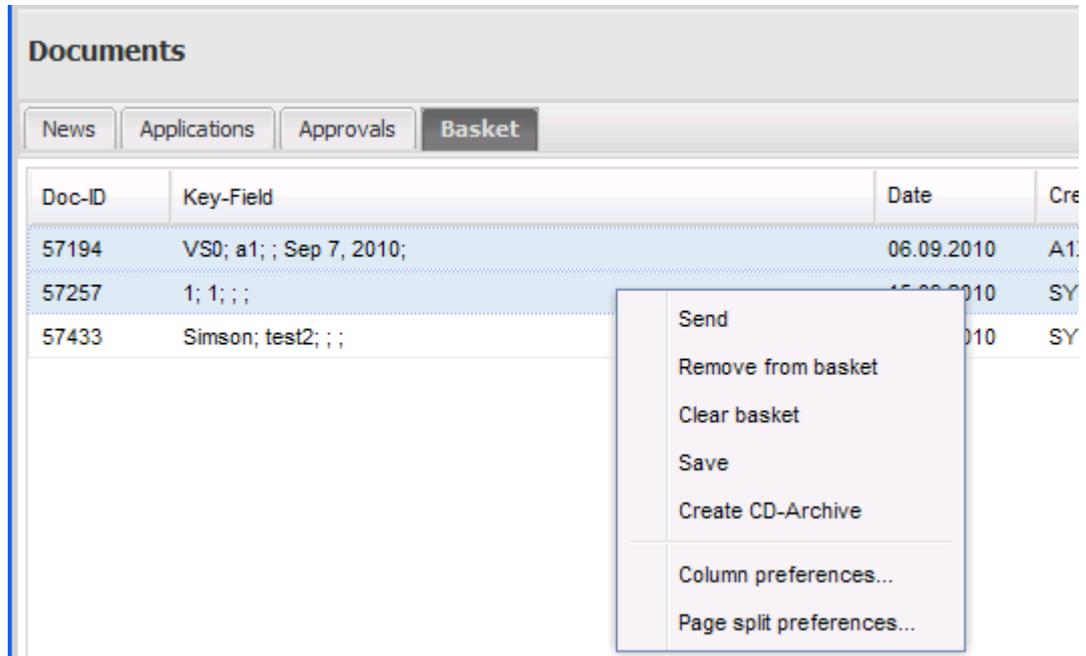
This removes the selected documents from the archive tab when Remove from basket is chosen from the basket context menu.



**Please note:** This function removes a document from the basket, the document will no longer appear in the basket tab. However, the document is **not** deleted from its archive.

## 6.5 Empty basket

The basket can be emptied completely by choosing Clear basket from the basket context menu. All documents are removed from the basket, leaving it empty, but the documents remain in their respective archives.



The screenshot shows a web interface titled "Documents" with a navigation bar containing "News", "Applications", "Approvals", and "Basket". Below the navigation bar is a table with the following data:

| Doc-ID | Key-Field               | Date       | Cre |
|--------|-------------------------|------------|-----|
| 57194  | VS0; a1; ; Sep 7, 2010; | 06.09.2010 | A1  |
| 57257  | 1; 1; ; ;               | 15.09.2010 | SY  |
| 57433  | Simson; test2; ; ;      | 01.10.2010 | SY  |

A context menu is open over the table, listing the following options:

- Send
- Remove from basket
- Clear basket
- Save
- Create CD-Archive
- Column preferences...
- Page split preferences...

## 7 Client Administration

The system administrator for TypMaster/DD may divide the users into several clients and delegate the maintenance of the clients organizational structure and its users to a client administrator.

Furthermore the client administrator is in charge of associating the users of his client to certain user groups.

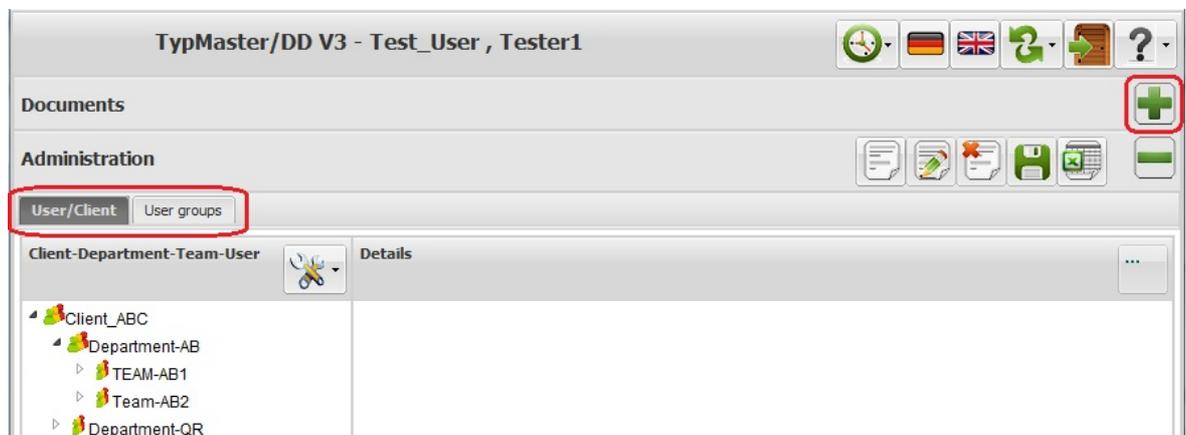
The functionality described in this chapter is only available for client administrators.

### 7.1 Invoking TypMaster/DD Administration

Client administrators can alternate to the administration area by pressing the + button at the bottom right.



To go back to the documents area press the + button at the top right.



The administration area for client administrators shows to tabs:

- User/Client  
for the maintenance of the client structure and the users of the client.
- User groups  
to add or remove members to or from the various user groups.

## 7.2 User/Client

### 7.2.1 Client Tree

A hierarchical tree in the selection view on the left shows the organizational structure of the client. The tree has 4 levels

- 1<sup>st</sup> level: client
  - 2<sup>nd</sup> level: department
    - 3<sup>rd</sup> level: team
      - 4<sup>th</sup> level: user

This inherent structure cannot be changed. Thus a user always has to be assigned to a team, a team relates to a department and a department relates to the client.

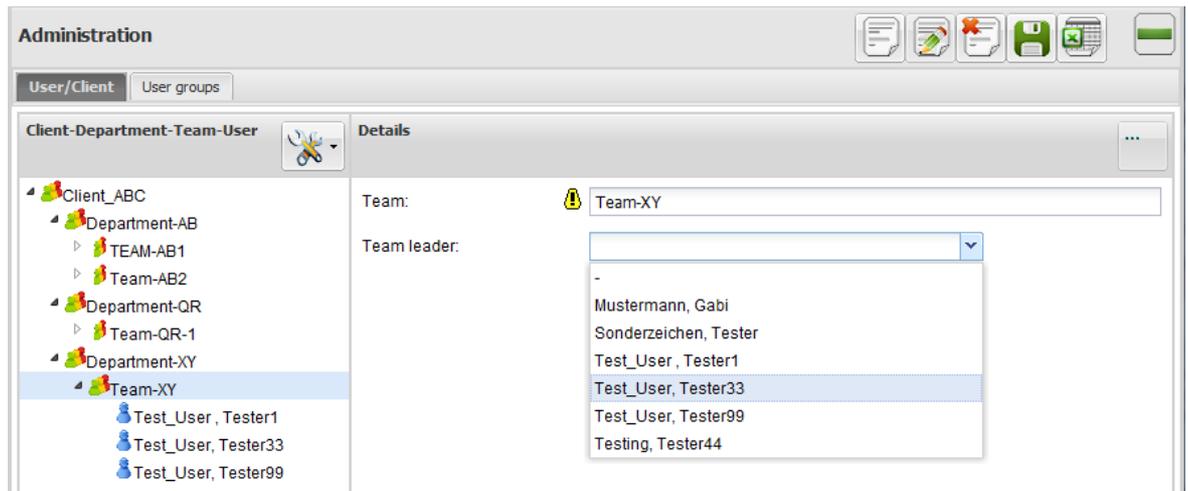
Click on the triangle to the left of an element or double-click an element in the tree to expand or collapse its child element(s).

#### Remark:

User can be marked as invalid users. By default the client tree does not show the invalid users. To display the invalid users as well, deactivate the option *hide invalid users*.



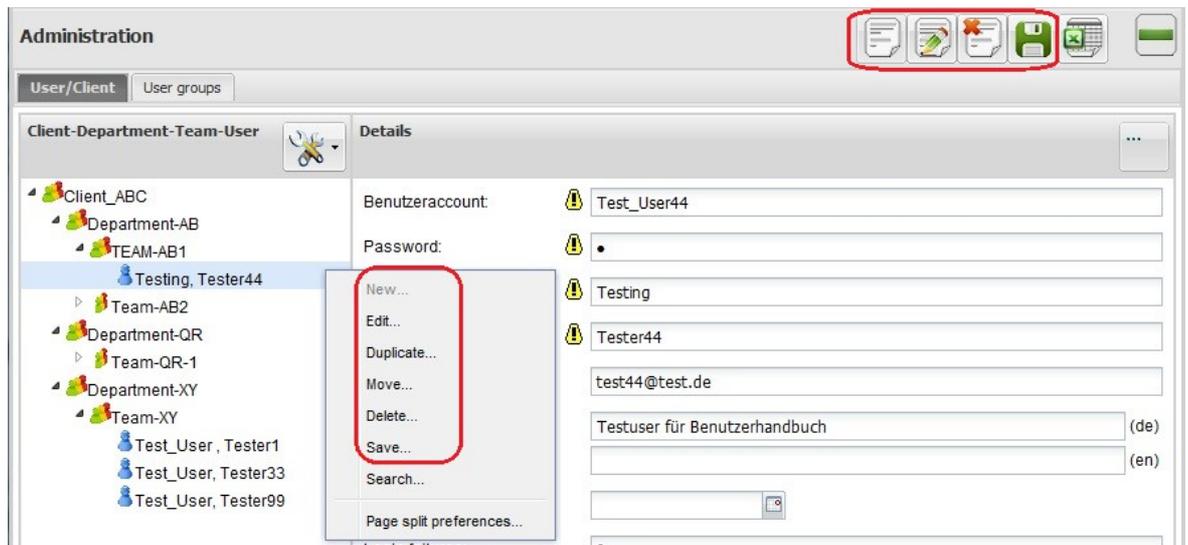
The details area on the right always shows the data of the element that is selected in the tree. Most attributes can be edited in the details area.



**Remark:**

The changes entered in the details area must be saved by pressing the button *Save*, selecting *Save* in the context menu or typing *ctrl+s*.

Right click on an element opens the context menu showing all functions available for the element. Some of these functions may be started by pressing one of the default-buttons on the top right.



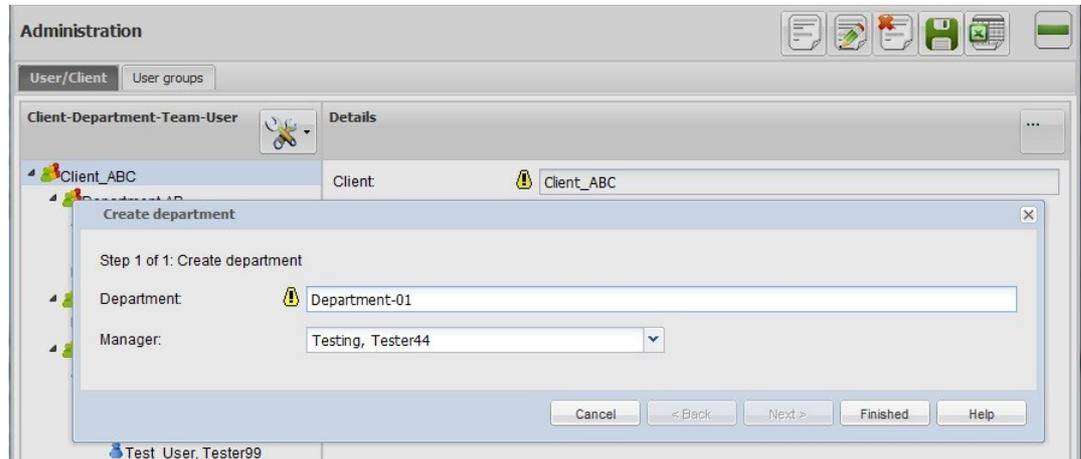
**Remark:**

*New* always creates a new child element of the selected element. E.g. selecting a team and calling *New* will create an new user in this team.

## 7.2.2 Department

### Create a department:

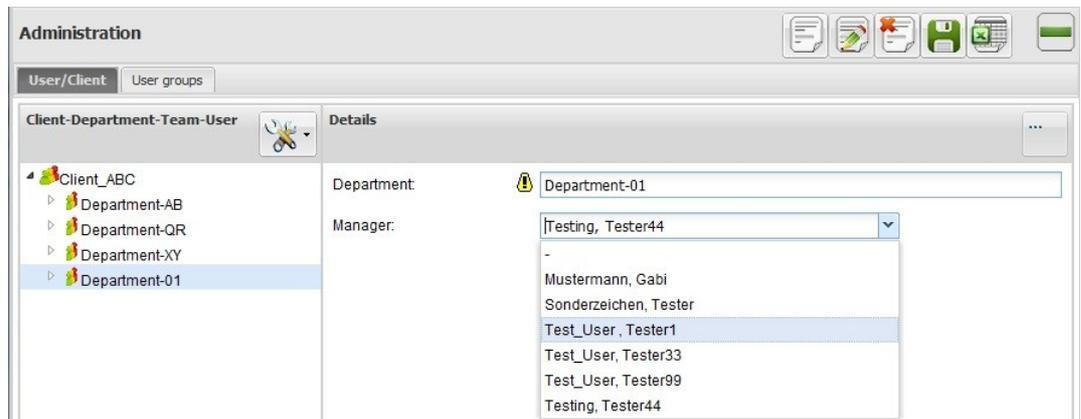
- select the client in the tree
- call *New* by pressing the default button or opening the context menu
- enter the data for the department in the popup window



- press *Finished*
- the new department is shown in the client tree

### Edit a department:

- select the department in the tree
- edit the department's name or select a new manager from the list

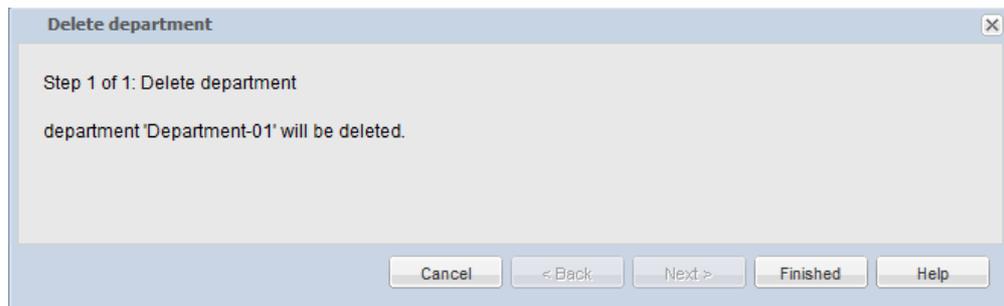


- press *Save*, enter ctrl+s or select *Save* in the context menu to save the changes

### Delete a department:

A department can only be deleted as long as no teams exist for the department.

- select the department in the tree
- press *Delete* or select *Delete* in the context menu
- a confirmation prompt is made to prevent inadvertent deletions

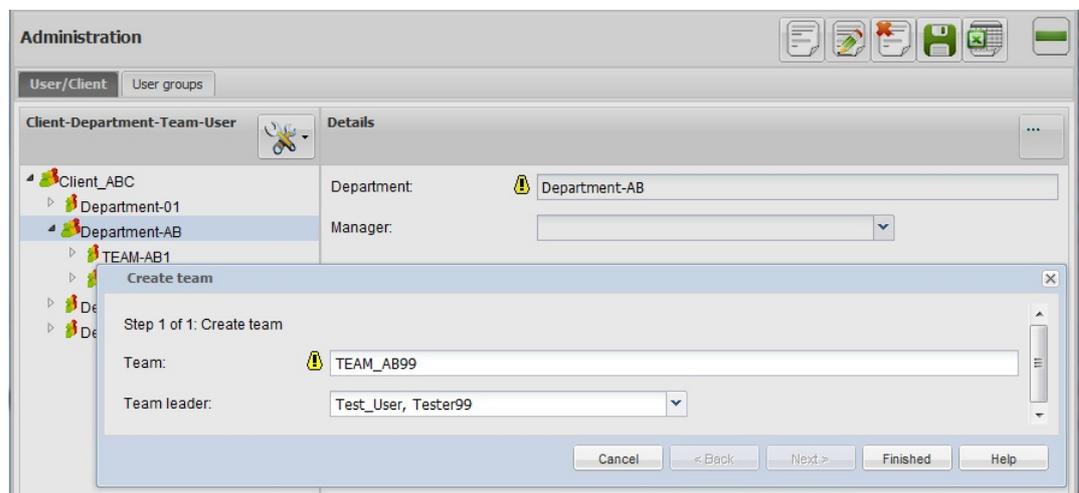


- press *Finished* to delete the department or *Cancel* to cancel the function

## 7.2.3 Team

### Create a team:

- select a department in the tree to add new team to this department
- call *New* by pressing the default button or opening the context menu
- enter the data for the team in the popup window



- press *Finished*
- the new team is shown in the client tree

### Edit a team:

- select the team in the tree
- edit the team's name or select a new manager from the list

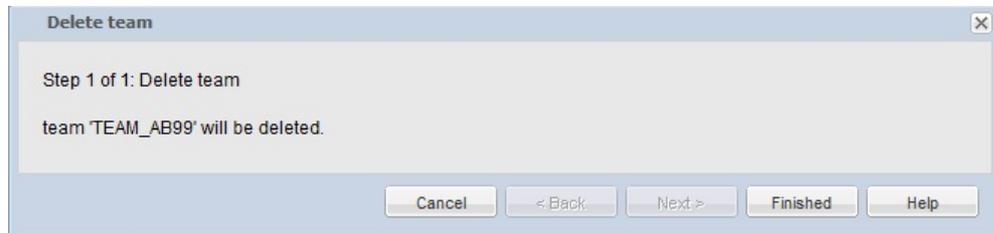


- press *Save*, enter *ctrl+s* or select *Save* in the context menu to save the changes

## Delete a team:

A team can only be deleted as long as no user exist for the team.

- select the team in the tree
- press *Delete* or select *Delete* in the context menu
- a confirmation prompt is made to prevent inadvertent deletions

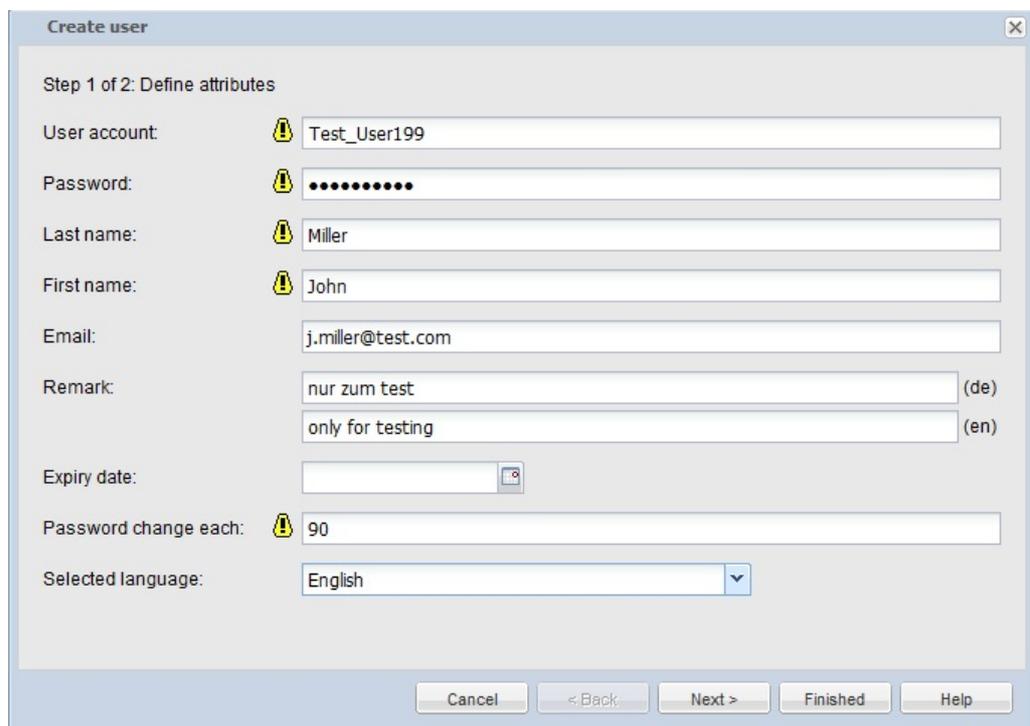


- press *Finished* to delete the team or *Cancel* to cancel the function

## 7.2.4 User

### Create user

- select a team in the tree to add new user to this department
- call *New* by pressing the default button or opening the context menu
- enter the user data in the popup window



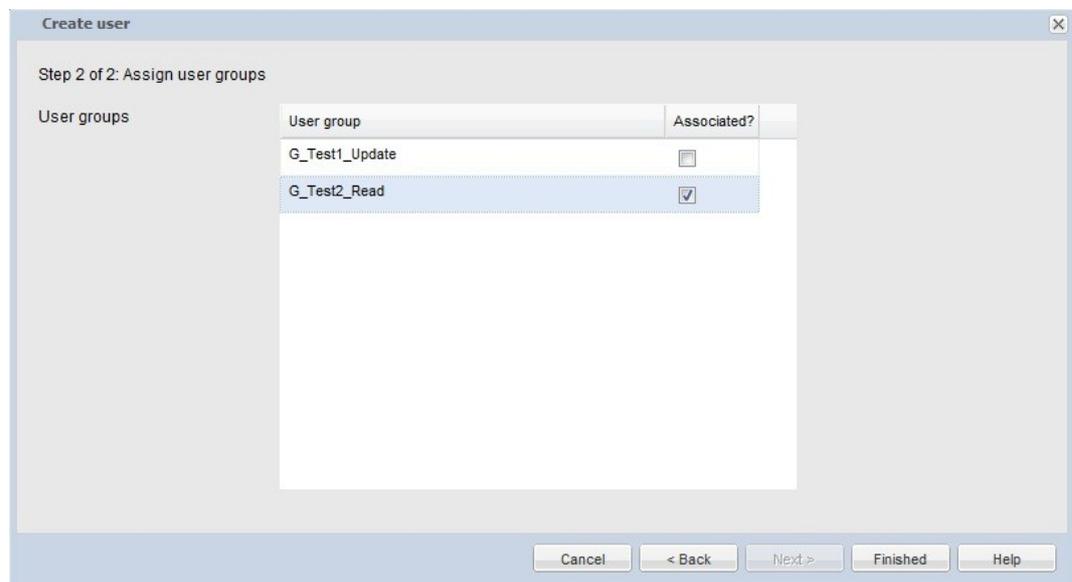
Step 1 provides several attributes:

- **User account**  
Name of the user account. The user has to enter this name in the login-dialogue
- **Password**

Every password has to meet the password policies of the system. The password policies depend on the configuration of the system, please refer to system administrator for detailed information.

- Last name, First Name  
The user's last name and first name.
- Email  
The user's email address. This address is used for sending a basket.
- Remark  
Any text can be entered here
- Expiry date  
The user is only able to logon to the system as long as the expiry date is empty or at later date as today. If not so, the user is an invalid user.
- Password change each  
Period of time in days that may elapse until the user is forced change his or her password.
- Selected language  
Language selected automatically for the user subsequent to the login.

Step 2 provides the user groups the new user may associated to.



- Use the checkboxes in the list to associate the user to the group(s)
- members of a group inherit all rights for archives, documents, document parts and part roles of from the group
- the groups available in this list and the rights of these groups are configured by the system administrator.

## Edit user

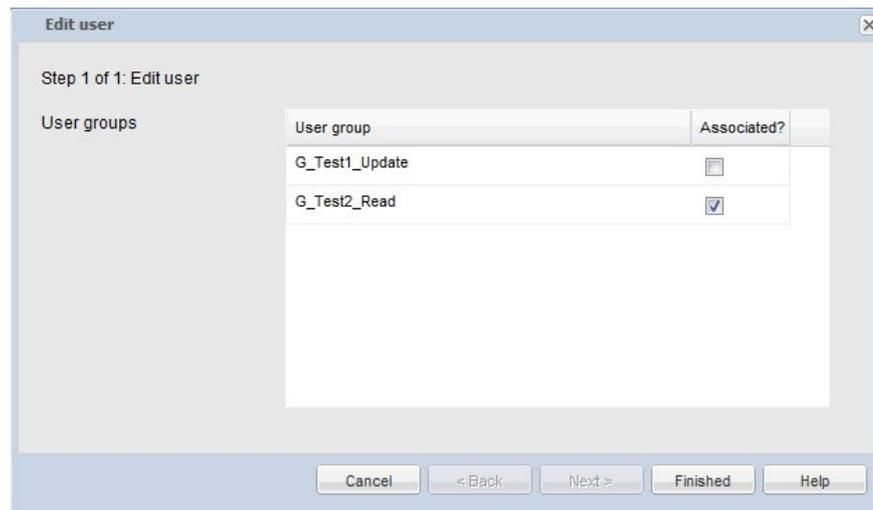
- select the user in the tree
- edit the user's attributes in the details area

The screenshot shows the 'Administration' window with a tree view on the left and a 'Details' panel on the right. The tree view is expanded to show 'Client-Department-Team-User', with 'Client\_ABC' selected. Under 'Client\_ABC', there are three departments: 'Department-01', 'Department-AB', and 'Department-QR'. Under 'Department-XY', there is a 'Team-XY' which contains four users: 'Test\_User, Tester1', 'Test\_User, Tester33', 'Test\_User, Tester99', and 'Miller, John'. The 'Miller, John' user is selected. The 'Details' panel shows the following attributes:

|                       |  |
|-----------------------|--|
| User account:         | Test_User199                               |
| Password:             | •  |
| Last name:            | Miller                                     |
| First name:           | John                                       |
| Email:                | j.miller@test.com                          |
| Remark:               | nur zum test (de)<br>only for testing (en) |
| Expiry date:          |  |
| Login failures:       | 0  |
| Password change each: | 90   |
| Last password change: | 23.03.2012                                 |
| Selected language:    | English                                    |
| Assigned groups:      | G_Test2_Read                               |

Important specific features of some attributes are:

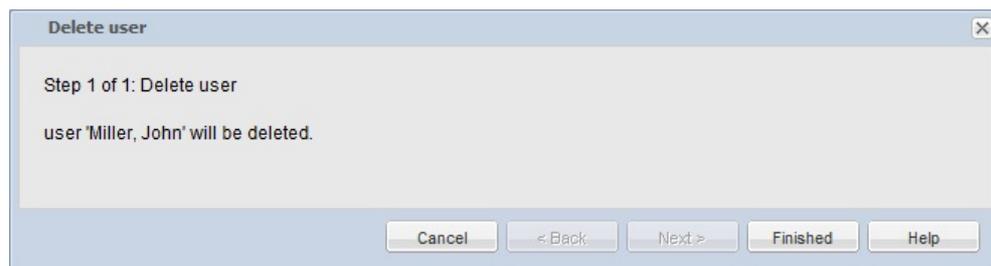
- Password:  
the client administrator may reset the password for a user, if needed.
- Expiry date:  
An expiry date before today invokes the user.  
To revoke the user the expiry date can be removed or set to a date in the future.
- Login failures:  
The system logs the failed login attempts for every user. After a certain number of login failures the access to the system is disabled for the user.  
Enter '0' to enable the access again.
- Last Password change:  
The date of the last password change is logged by the system.
- Assigned groups  
A click in the list of assigned groups opens the wizard for the group assignment of the user.



- press *Save*, enter ctrl+s or select *Save* in the context menu to save the changes

### Delete User

- select the user in the tree
- press *Delete* or select *Delete* in the context menu
- a confirmation prompt is made to prevent inadvertent deletions



- As soon as a user is owner of documents it is not recommended to delete the user. Otherwise there would exist documents in the archives without an owner, there would be no possibility to determine the primal owner.

In this case the confirmation messages informs about the fact that the user is owner of documents and recommends to set the user to invalid instead of deleting the user:



Use the checkbox to decide if user should be set to invalid or deleted.

- press *Finished* to delete respective to invalidate the user or *Cancel* to cancel the function

## Duplicate User

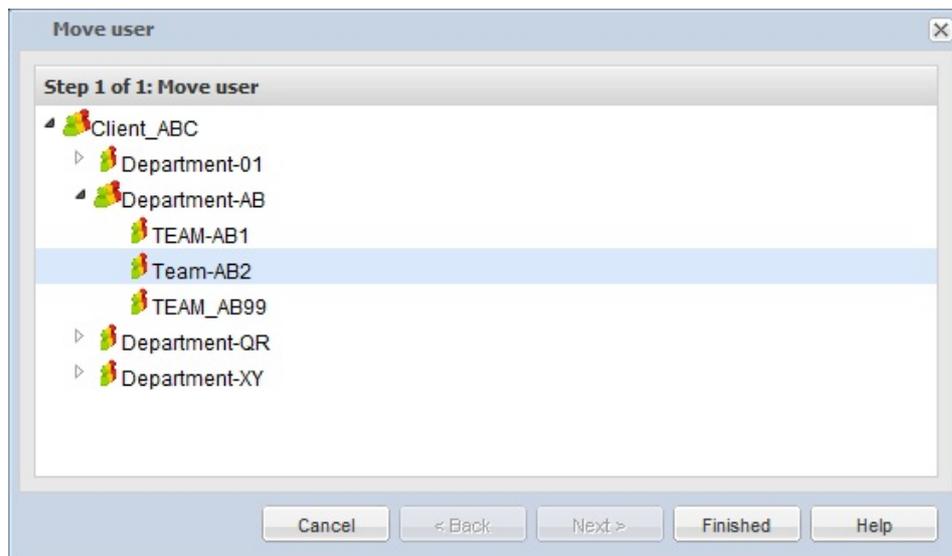
The function creates a new user based on the data of an existing user.

- Select a user in the client tree
- call *Duplicate* in the context menu
- Step 1 and 2 of wizard for the user creation is initialized with the data of the selected user, except of user account and password.
- change the data as desired
- press *Finished* to create the new user

## Move User

With this function users can be moved from one team to another.

- select user(s) in the client tree
- call *Move* in the context menu
- in the popup window select the target team for the selected user(s)

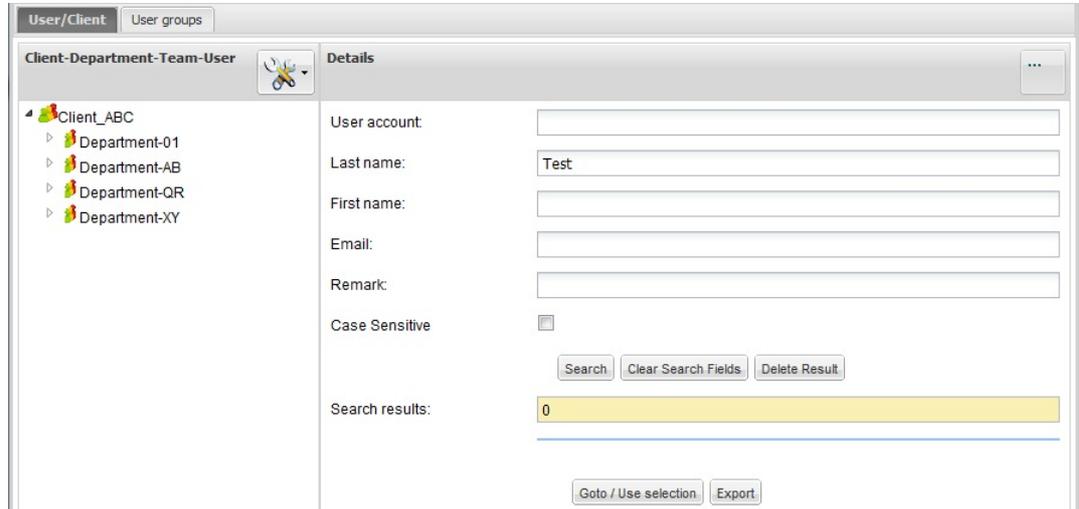


- press *Finished* to move the user(s) to the selected team

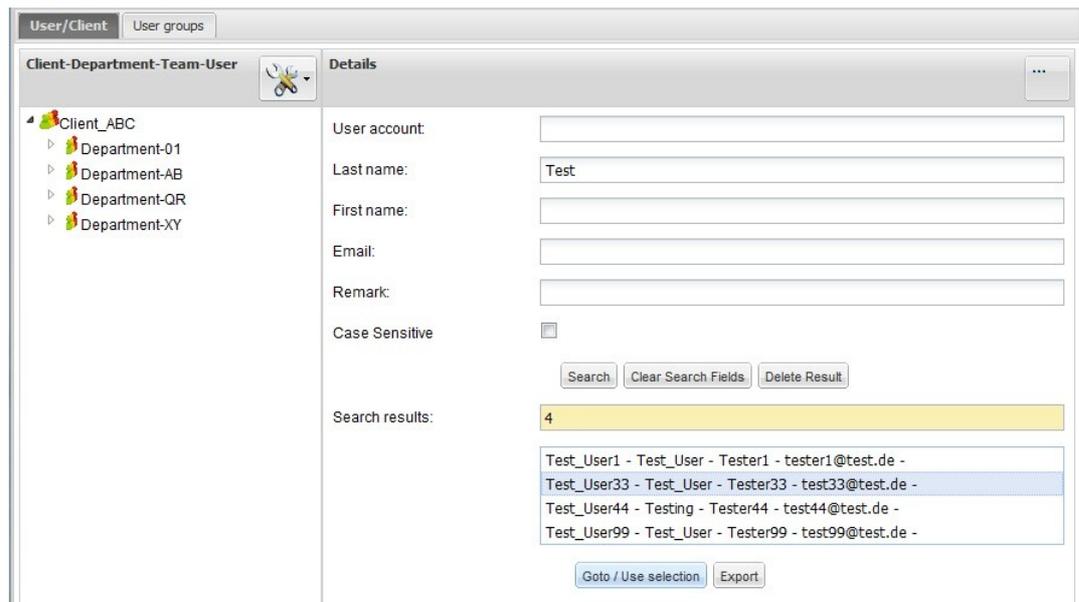
## 7.2.5 Search User

Search user helps you to find a certain user in a complex client structure.

- call *Search* in the context menu of any element in the client tree
- enter the search criteria in the various attributes of details area.



- Use the check box *Case Sensitive* to decide if the search shall be performed with or without case sensibility.
- press *Search* to find the users matching the given search criteria. The result of every search is added to the list of results. Thus the results of several searches with different criteria may be combined in one list of results.
- *Clear Search Fields* is used to remove the input in all attribute fields.
- *Delete Result* removes the content of the list of results.



- The list of results may be exported to Excel by pressing *Export*
- to navigate to a certain user in the client tree select the user in the list of results and press *Goto / User Selection*

## 7.3 User Groups

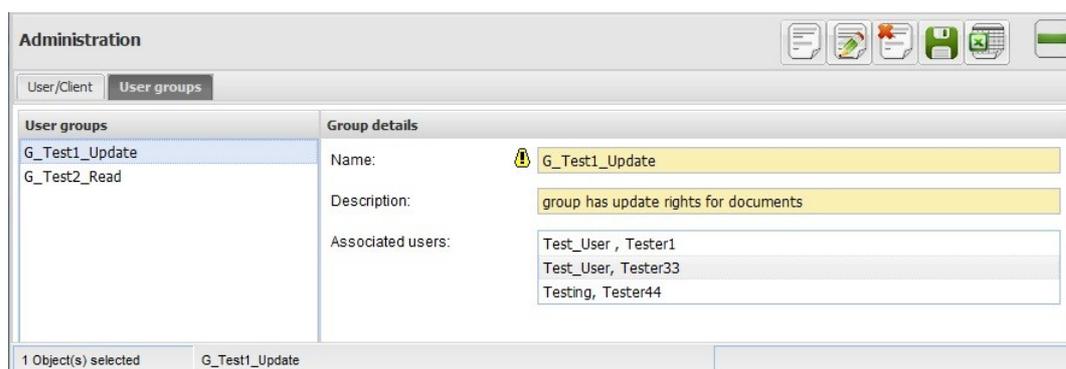
The User Groups tab shows in the selection area on the right the list of user groups available to assign users to or to remove users from. The groups available in this list and the rights of these groups are configured by the system administrator.

Members of a group inherit all rights for archives, documents and document parts. Additionally the members of a group may carry out a certain role in the system.

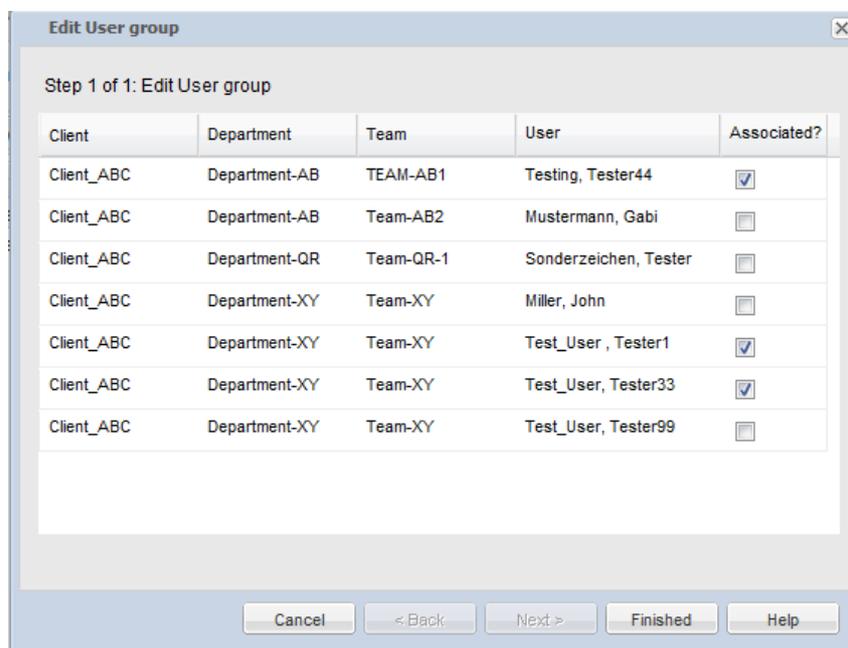
One user may be member of several group and should be member of one group at least.

To add users to or remove users from a group:

- select the group in the selection area



- click in the list or associated users, click the *Edit* button or select *Edit* in the context menu to open the wizard:



Use the checkbox *Associated?* in the table to add or remove users.

- press *Finished* to save the changes or *Cancel* to complete without saving

## A Further applicable documents

Manual for System Administrators: "TypMaster/DD 3.1 Handbuch Administration"

## Change History / Release Notes

| Version | Last revised | Author/Editor | Reason | Changes/Comments  |
|---------|--------------|---------------|--------|---|
| 1.0     | 2012-03-23   | Ingrid Restle |        | New Document derived from the online help document.<br>Chapter 7 added. |
| 1.1     | 2012-04-23   | Ingrid Restle |        | New screenshot for part role selection in section 5.2.1                 |
| 1.2     | 2012-08-20   | Ingrid Restle |        | Changes according to KBA re-view (Sections 3.3, 4, 5.2.1, 6.1, 6.3)     |