



# SWANenterprise - SWANcloud

User Manual

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**SWAN**   
6.0

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SWAN 12.1	User Manual SWAN 22.08.2012	
SWANenterprise 12.2	SWANenterprise-SWANcloud User Manual 09.11.2012	Complete revision of the predecessor document
SWANenterprise 5.0	SWANenterprise-SWANcloud User Manual 01.09.2013	Content identical with predecessor document New SSC colours and logo
SWANenterprise 5.4	SWANenterprise-SWANcloud User Manual 17.06.2014	Update screenshots New layout, new address neu: Hinweise zum Handbuch, Registerkarte Projekt
SWANenterprise 6.0	SWANenterprise-SWANcloud User Manual 03.06.2015	Complete revision of the predecessor document- new GUI

### Current document

#### User Manual SWAN 6.0

Doc version	SWAN version	Date	Chapter	Description	Author
V1.1	6.0	July 1, 2015	6.11	Additional info section	SSC- Services GmbH
			6.13	Column ‚Download‘	
			8.4	Content: Selecting files, viewing content of tar container	C. Chudoba
			8.7	Downloading many files	

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## Glossary

Term	Explanation
<b>CC email</b>	Information email about the dispatch of data in SWAN. A CC email recipient only receives information about the dispatch, not the data.
<b>GUI</b>	Graphical User Interface
<b>ISO image file</b>	Computer file containing a core image of the content of a CD or DVD that is structured in the format ISO 9660.
<b>OFTP</b>	<p>ODETTE File Transfer Protocol (OFTP) is a protocol for the direct electronic transfer of files between two communication partners.</p> <p>It can be based on two different transport layers:</p> <p>Version 1 – ISDN (B- and D-channel), X.25, etc.</p> <p>Version 2 – TCP/IP (Internet)</p>
<b>SWANcloud</b>	Product, distributed by SSC-Services GmbH for the worldwide exchange of engineering data. The subscription solution allows a cost-efficient data exchange as Internet service, which is available regardless of its location and without investments into IT infrastructure.
<b>SWANenterprise</b>	Product, distributed by SSC-Services GmbH for the worldwide exchange of engineering data. The purchase software allows the optional connection of third-party systems and the connection of external data exchange partners.
<b>TAR</b>	TAR is the abbreviation of "Tape ARchive". An archiving program in the UNIX environment that sequentially writes files into a single file without compressing them (archive) and then reads them back again. The file extension for files archived with the TAR system is ".tar".
<b>URL</b>	Internet address or web address
<b>ZIP</b>	Format for compressed files, which on the one hand reduces the space requirements in archiving and on the other hand acts as a container file in which multiple files that belong together or even entire directory trees can be combined together. The file extension for files archived with the ZIP system is ".zip".





# 1 Welcome to SWAN

SWAN is a professional data management system that is used for automated OFTP/OFTP2 data exchange between development partners.

In addition to functions for the safe receipt and sending of data, SWAN also offers a range of other advantages that, depending on the installed SWAN variant, can be implemented in the background by integrating numerous complex processes.

This includes:

- » CAD data conversions
- » Data quality checks
- » Extraction of structure data from EDM systems
- » Data encryption and logging
- » Archiving of the exchange process

Support for national and international standards such as OFTP, ENGDAT (electronic delivery note) and ENGPART (automated exchange of partner data) enables smooth and problem-free data exchange between development partners.

The latest SWAN version comes with a fully new graphical user interface (GUI). We have developed a modern and functional interface that makes it easy for you to generate and download your orders thanks to an intuitive operating concept.

You can use all of the functions via two individually configurable main views (job form and job list). Global elements in the GUI (quick search and the Extras menu) bring you directly to the desired job or give you access to the display, as well as to various setting options for your profile data, online data, and SWAN support.

A Java installation is no longer necessary. Uploading and downloading is done via a function integrated in the browser.

The SWAN user manual describes the elements of the new user interface and also provides you with information about fundamental aspects of its operation.

Administrator functions and the associated controls are visible only to users with corresponding roles and authorisations. A description can be found in the SWAN admin manual.

Project supervisors and their representatives will still have access to the *project* tab in the user interface for the previous version in order to manage their projects.

Information on using the old user interface (e.g. for users with administration rights) can be found in the SWANenterprise-SWANcloud User manual for SWAN-Version 5.4.

Currently, the following languages can be selected for the SWAN user interface:

- » German
- » Chinese
- » English
- » French
- » Japanese
- » Portuguese
- » Russian
- » Spanish
- » Turkish



#### Information

You can select and save the language in the menu *Extras > My profile > Settings*.

---

## 2 General information about this manual

This user manual describes the elements of the user interface for all SWAN variants and also provides you with information about fundamental aspects of their operation.

This manual contains various types of information, which are marked accordingly.

- Instructions are preceded by the symbol ■ .

Example:

- Click .....

- The outcome of an action is indicated by the symbol ».


Example:

- » The *XXX* menu appears.

- Controls in the SWAN user interface are shown in *italics*.

Example:

*Job* view.

- Useful information and notes on the differences between the SWAN variants can be found in the sections identified with .



### Information

You can .....

---

### 3 System requirements

In order to use SWAN, all you need is a windows computer (windows 7) with an Internet browser and a valid SWAN client certificate.



The client certificate is issued by the SSC certification authority and will be sent to the new SWAN user via email.

As the certificate is verified upon every SWAN login, you should store the certificate in a secure directory on your computer.

You will receive the certificate key-password in a separate email. It has to be entered during the installation.

Manuals for the installation of the SWAN client certificate are available in the support area of our homepage (<http://www.ssc-services.de>).

The following browser versions are supported:

-  Internet Explorer 10/11.
  
-  Firefox, version 38 or higher

The following components need to be activated or installed in the browser in order for the data transfer to work correctly:

- Session cookies
- Sufficient storage space in the download path  
(Default: C:\User\Username\Downloads)
- Java script activated
- Html5
  
- Internet Explorer: Sending of UTF-8 URLs activated (URL UTF-8 encoding activated)
  
- Screen resolution of at least 1280x800 pixels.
  - » Operation of SWAN with smartphones, netbooks or tablets is not possible or only possible to a limited extent.

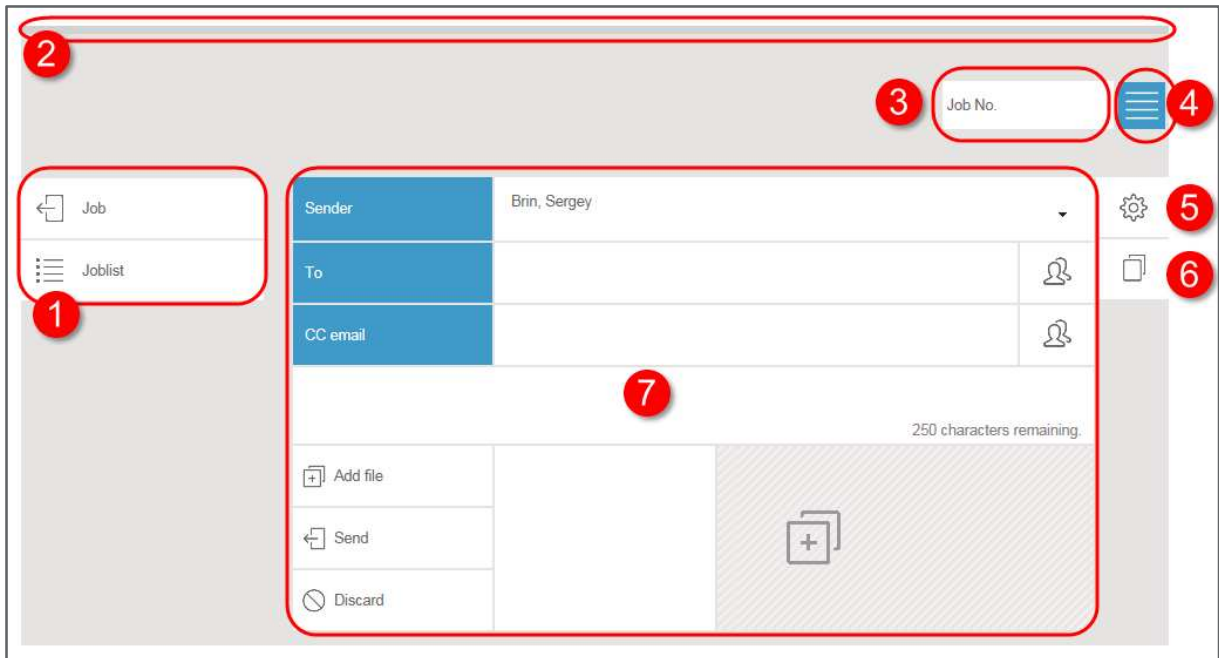
## 4 Launching SWAN

- Start the Internet browser (Internet Explorer or Mozilla Firefox).
- Enter the SWAN address (URL) into the address line of the browser.
  - » The SWAN login screen is displayed.
- Log in with your user name (user ID) and your password.



## 5 Elements of the GUI

The following figure shows an overview of the elements of the GUI. You can find a description in the following subchapters.



- 1 Views**
  - Create job
  - Use job list
  - Call up administrator functions  
(is only shown if the user has the correct role)
  - ▶ Chapter 5.1
- 2 Progress bar**

Indicates progress for uploads and downloads

  - ▶ Chapter 5.2
- 3 Quick search field**

Job search, e.g. using the job number

  - ▶ Chapter 5.3

- 4 Extras**
  - Help (online help)
  - My profile (personal data, system messages, settings, delegation)
  - User interface for the previous version (for administrators)
  - Via (version information)
  - Support (contact information for the SWAN service desk)
  - Logout

▶ Chapter 5.4
- 5 Job form configuration**

Show and hide fields in the job form  
(processes/send options, send time, project ID, etc.)

▶ Chapter 5.5
- 6 Templates for recurring send jobs**

Create, manage, and use templates.

▶ Chapter 5.6
- 7 Job form**

Create new send job, use and manage address books

▶ Chapter 6

## 5.1 Views - Overview

---



### Information

You can select and save the start view via *Start page after login* in the *Extras > My profile > Settings* menu.

---

### 5.1.1 Job view

After selecting the  *Job view*, you can create a new job.

You can select a data recipient and the data to be sent, can inform persons that you have sent data via a so-called CC email, can enter a client who requested you to send the data, as a project member select a project as the sender, can select processes or send options that should be applied to the data, define a send time, and use other functions.



In addition, in this view you can edit the entries for your personal address books for data recipients and CC email recipients, select recipients from the address books, and define default recipients.

The input area required for a job, e.g. to select certain processes, can be shown and hidden using the



symbol . The settings remain until you deselect the appropriate input area again.



**Information**

The selection options are dependent on the SWAN variant you are using.

A detailed description can be found in chapter 6 Job view - Job form.

**5.1.2 Job list view**



If you select the *Job list* view, you will see a list of your jobs on the left side. To search for a specific job, you can filter this list according to various search criteria and can create and manage search templates.

The current status of your job is identified by the coloured bar on the left edge of the status column, as well as by the brief status description.

After selecting a specific job, you will see information on the job on the right side (contact data, job history, information on job contents such as file names, file type, size, etc.) and, depending on the type of job, be presented with possible functions. You can, for example, download the received data into your file system or resend the sent job.



**Information**

The job list is only for display purposes. Functions, such as downloading or visualizing data are only available after you select a specific job by clicking in the appropriate line in the job list.

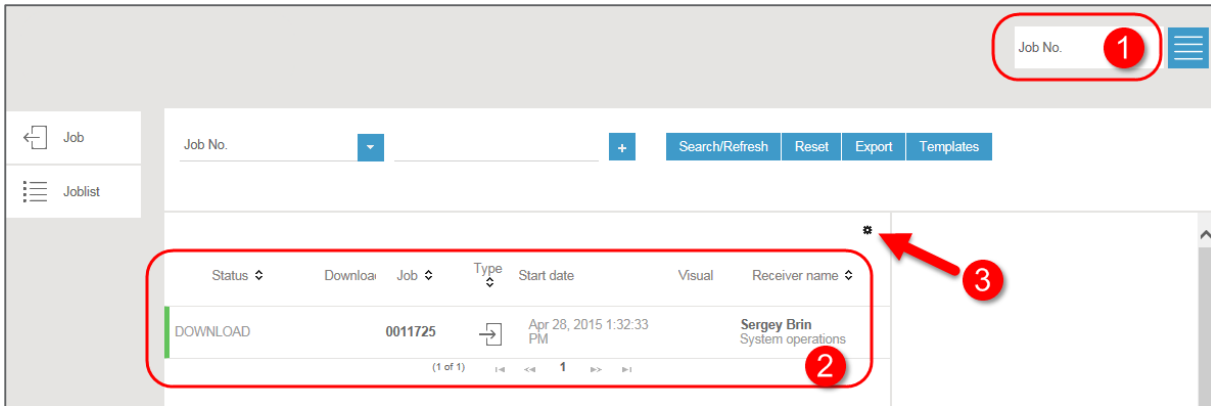
A detailed description can be found in chapter 8 Job list view




## 5.2 Progress bar


The progress bar at the top edge shows you the data transfer progress when uploading or downloading.

## 5.3 Quick search



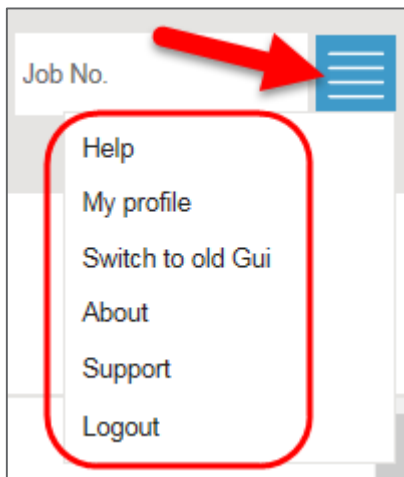
- If you know the job number you can search for a specific job by entering the job number in the search field **1**.


- » The job is shown in the  **Job list** view in section **2**.
- » Possible functions and information on the job appear on the right side.

Using  **3**, you can define which columns you want to see in the job list.

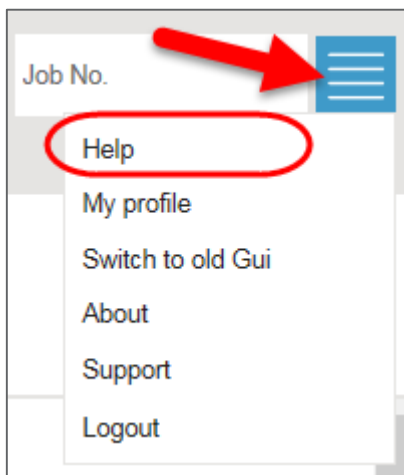
- Activate the appropriate checkbox. Your selection will be saved.

## 5.4 Extras



- Click  in the top right corner to go to the extra functions.

### 5.4.1 Help and support for problems



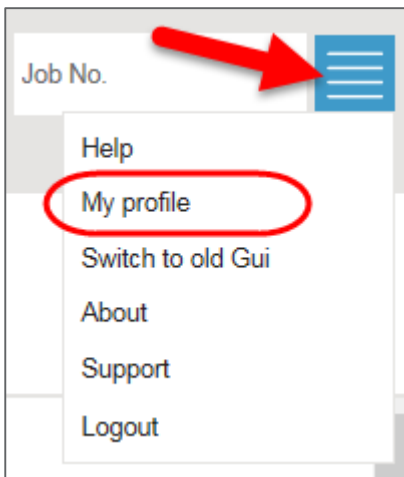
The online help provides you with initial information on operation. There you can also download a PDF of the user manual.

- Click *Help* to call up the online help.

In the support area of our homepage <http://www.ssc-services.de> you find different documents and service tools, which can be used for trouble shooting on occurring difficulties.

Please contact our Service Desk if you need further support. Contact data can be found under **Extras** > **Support**. (Chapter 5.4.8 Support - Service Desk - Contact data).

## 5.4.2 My profile - Overview




- Click *My profile*.

**Overview** contains information on your personal data with which your SWAN account is registered in the system database, such as contact data and personal address code, and the authorisations and project assignments set up for your user account.

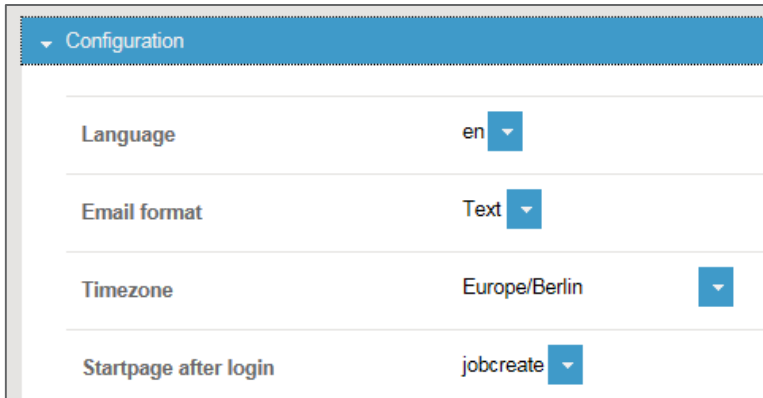
You have an option to change your password here if the system has not been configured for single sign-on.

Depending on your rights, you can make settings and manage delegation in the fold out **Configuration** and **Delegation** menus.

<b>Your personal data</b> Name: Brin, Sergey Username: sbrin Department: System operations Your personal addresscode: SWAN0112A1234 Phone: +1 20 7551 0044 Facsimile: Email: s.brin@goopple.nirv		<b>Change personal password</b> Old password: _____ New password: _____ Repeat password: _____ Length: min 7, max 15 Capital letters: min. 1 Digits: min. 1 <input type="button" value="Change password"/>		<b>Permissions</b> ▾ Brin, Sergey ▾ Projects TEST-SWANGUI
▶ Configuration ▶ Delegation ▾ System messages				
Date: _____ Notification: _____ No records found.				

### 5.4.3 My profile - Configuration

You can change your profile settings in the *Configuration* section.



- Open the *Configuration* section.
- Click the down arrow next to the desired setting and select the appropriate option.
  - » The selection will be taken over directly.

Option	Description
Language	Interface language
Email format	Select the email format (text or html)
Time zone	Time zone for the server location. Example: location in Germany ⇔ Europe/Berlin
Start page after login	Here you select which view is active after login: Job - Job list

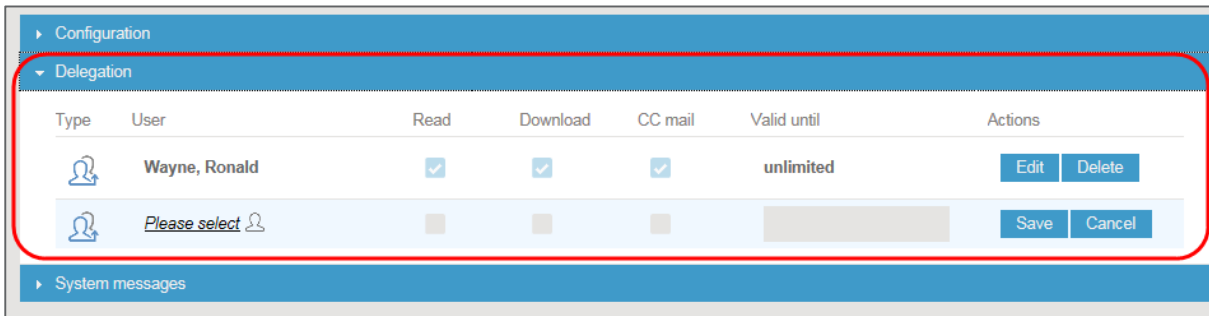
### 5.4.4 My profile - Delegation

With the delegation function, you can grant other users in your company access to your jobs. You can assign time-limited rights to read, collect and receive a CC email upon receipt of a job.



#### Information

SWAN sends an email every six months to all users who have set up one or more delegates. The email contains all of the delegations of the relevant user and a direct link for the administration of these delegations.



- Open the *Delegation* menu.

- Click *Please select*.

- Select a user using *User search*.

- Click the desired user in the search results.

- Click *Apply* to delegate to this user.

- Edit the access settings and save the selection.

If you do not enter anything in the field *Valid until*, access will be granted without a time limit.

### 5.4.5 My profile - System messages

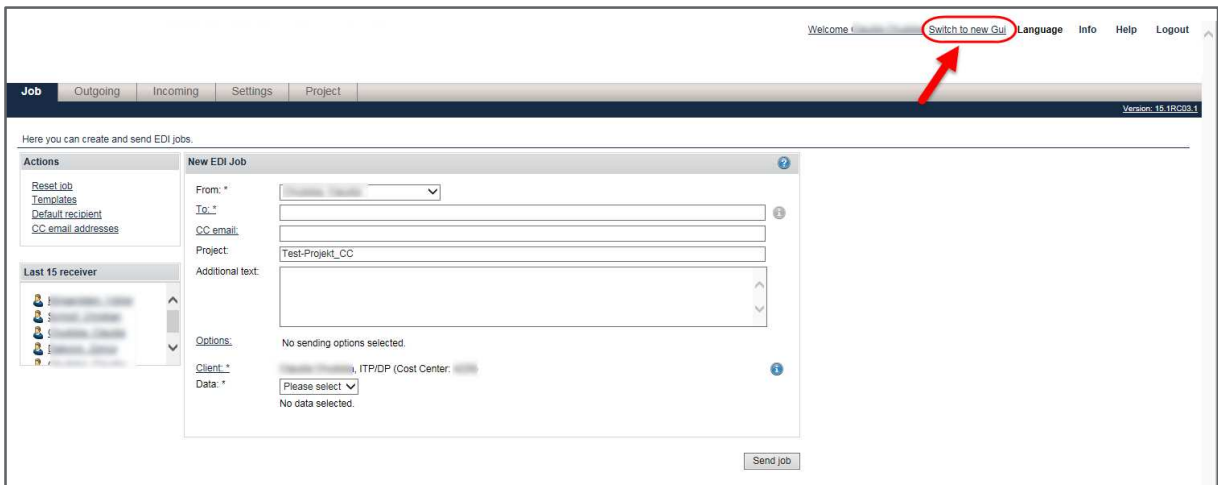
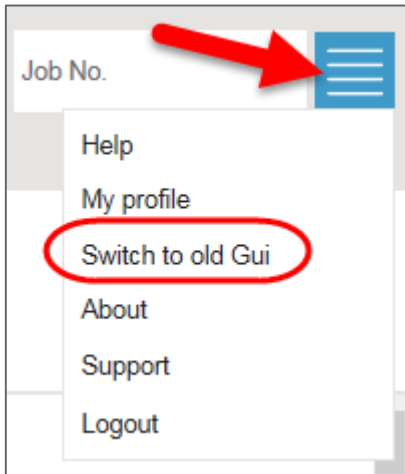
*System messages* shows a list of messages on e.g. system malfunctions and waiting times.

### 5.4.6 Previous user interface

 **Information**

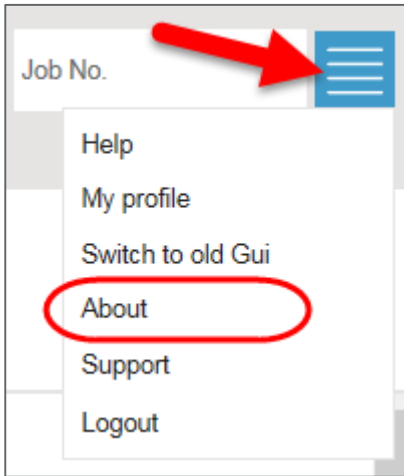
Only the new user interface is available for users without special rights.

Users with special roles e.g. project supervisors and their representatives see the link **Switch to old Gui** and can use it to manage their projects in the old GUI using the **Projects** and **Settings** tabs. You can switch back using the **Switch to new Gui** link.

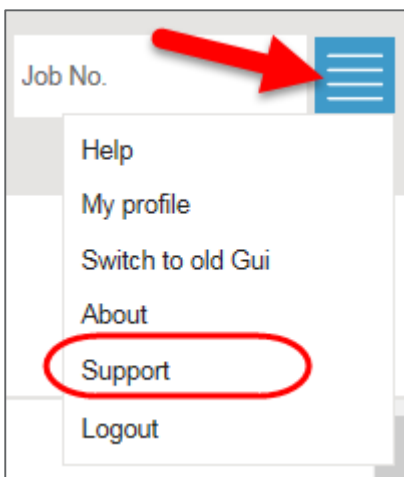


### 5.4.7 Version information

Information on the installed SWAN version.



### 5.4.8 Support - Service Desk - Contact data



Please contact our Service Desk if you need further support.

Our expert team will provide advice from Monday until Friday between 7:00 AM and 05:00 PM.

#### **SSC-Services GmbH**

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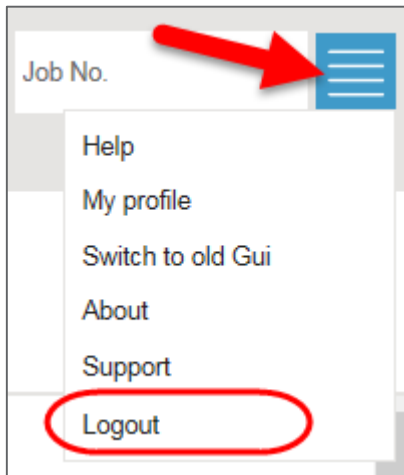
Mail: [servicedesk@ssc-services.de](mailto:servicedesk@ssc-services.de)

Internet: <http://www.ssc-services.de>

### 5.4.9 Logging off

To finish your work with SWAN, you should not merely close the browser window.


- Click **Logout** to end your SWAN session.





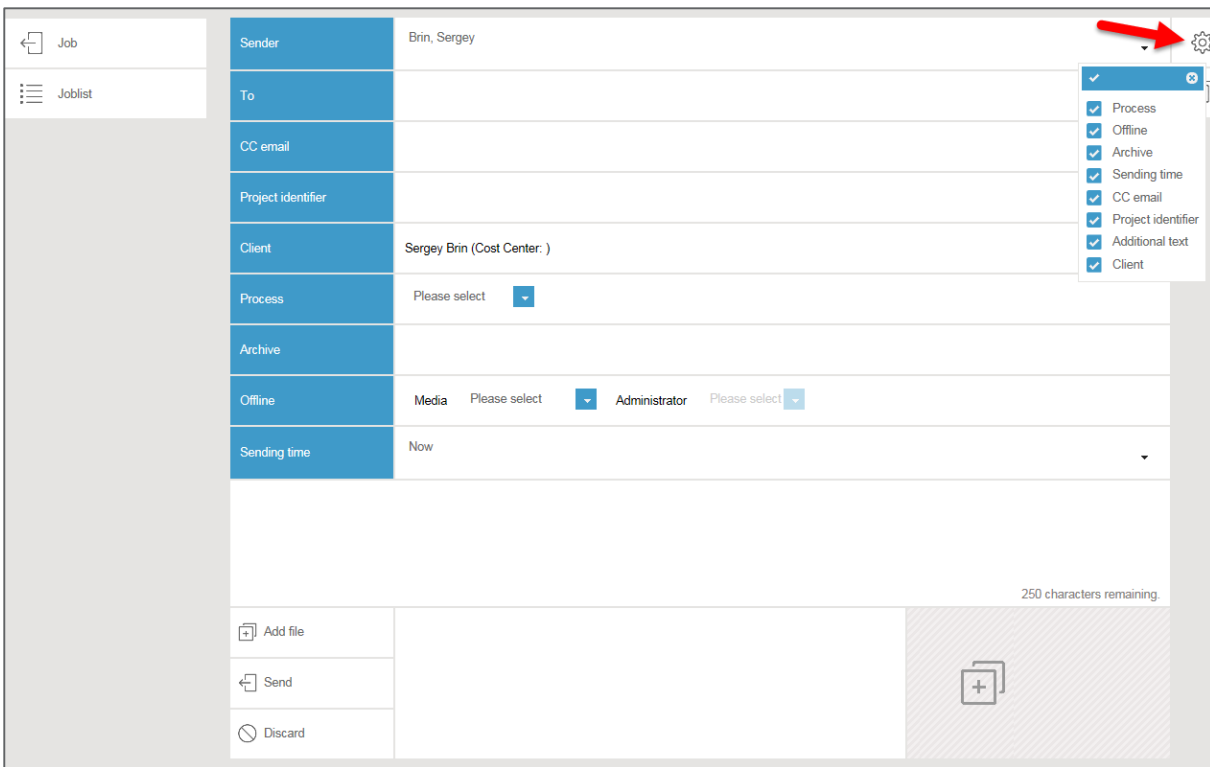
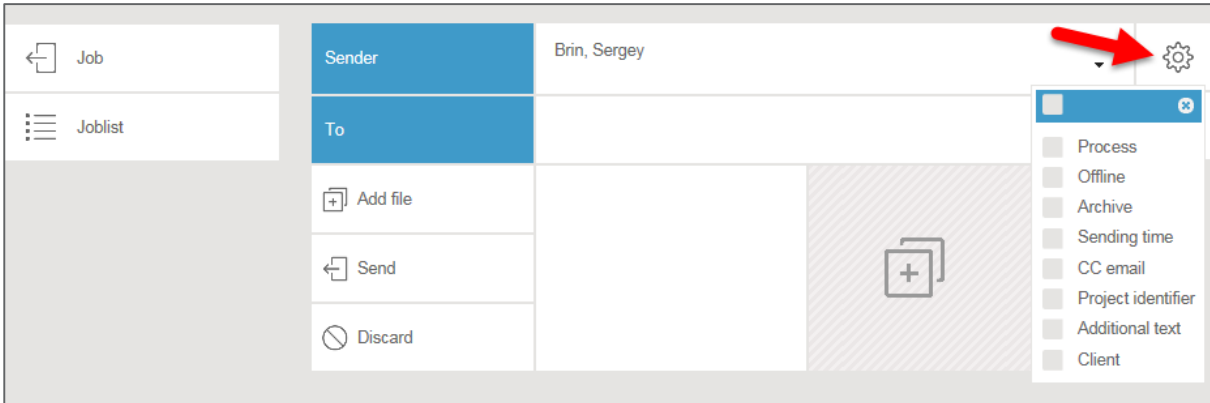
## 5.5 Job form configuration



Using the  symbol, you can adapt the job form to your needs and show and hide additional input areas, e.g. to select processes for data preparation.

In the minimum configuration, you can enter a recipient, add data to the job and send the job.

You will only see the **Sender** field if you are a project member.





### Information

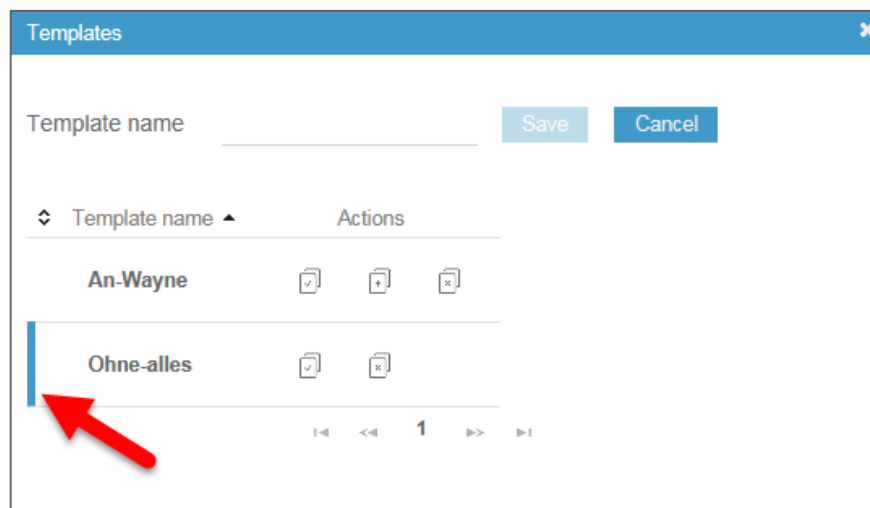
The administrator can set which fields can be shown. The fields vary depending on the installed SWAN version.

## 5.6 Templates for recurring send jobs



You can create templates for recurring send jobs, select these templates for new send jobs and e.g. identify a specific template as the default, which will always be used for a new send job.

### 5.6.1 Creating a new template





- Activate the  *Job* view.
- Configure the job form to fit your needs.
- Fill in the fields.
- Click *Templates* .
- Select a name for the template and click *Save* to confirm.



## 5.6.2 Managing and using templates

- Activate the  *Job* view.
- Click *Templates* .

Here you can

- Search for templates .
- Select templates for a new send job .
- Delete templates .
- Select template as the default template for future send jobs .
  - » The template is identified by a coloured bar on the left edge.

## 6 Job view - Job form



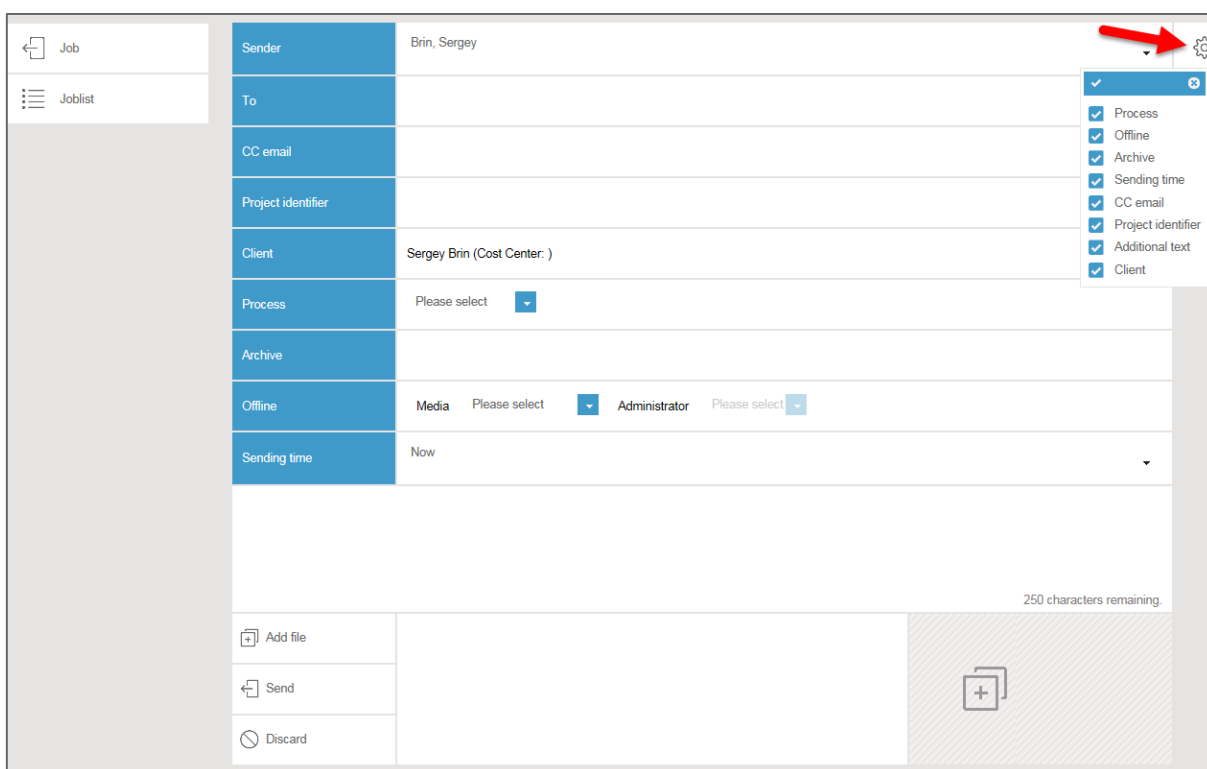
You can make entries for sending your data in the job form in the **Job view**. To do this, configure the input fields to fit your needs (see chapter 5.5 Job form configuration).

Select whether you are the sender or are sending data on behalf of a project.

To quickly select a recipient, you can click one of the last recipients, search for and select a recipient in the address book, or use a job template in which the recipient is listed.

You define the data recipients in the **To: field**. These persons will then receive the data.

CC email recipients do **not** receive any data, they are only informed that the data has been sent in an email with a data delivery note.



The individual fields in the job form are described in more detail in the following subchapters.



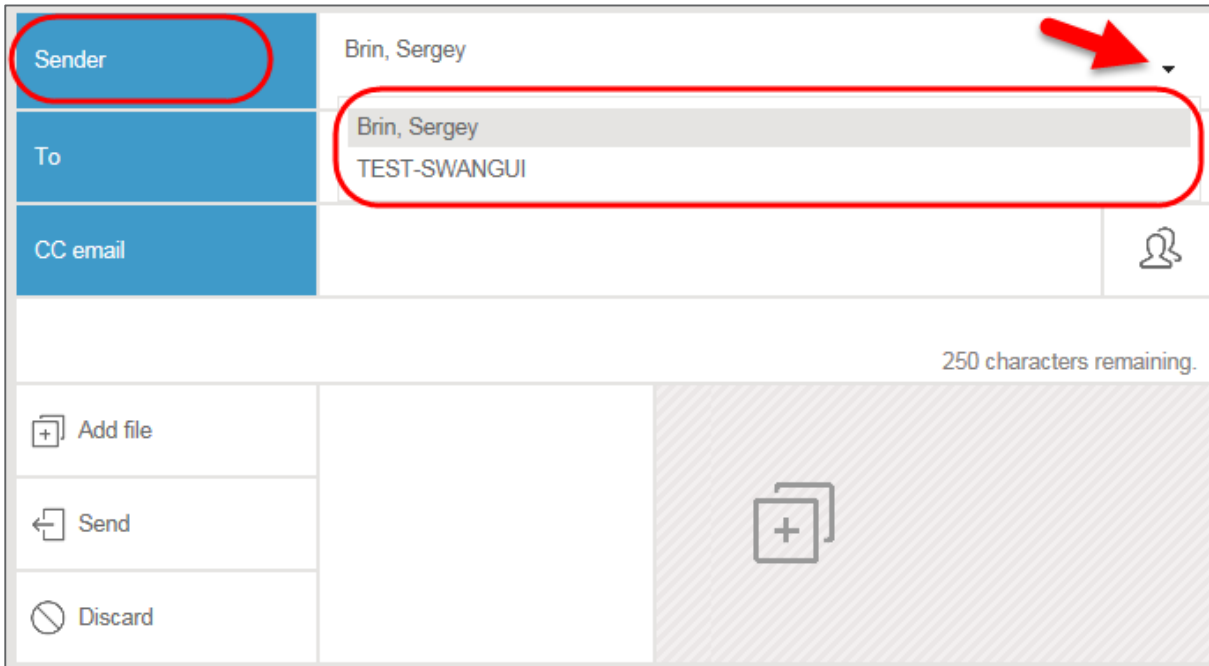
### Information

The administrator can set which fields can be shown. The fields vary depending on the installed SWAN version.

## 6.1 Sender







You will only see the **Sender** field if you are a project member. If you are a member, you can select whether you want to send a job in your own name or if you are acting on behalf of the project.

- Click the triangle in the top right corner.
  - » A list of possible senders will appear.



The screenshot shows a form with three rows: 'Sender', 'To', and 'CC email'. The 'Sender' field is highlighted with a red oval and contains 'Brin, Sergey'. A red arrow points to a small downward-pointing triangle in the top right corner of the 'Sender' field. The 'To' field is also highlighted with a red oval and contains a dropdown menu with 'Brin, Sergey' selected and 'TEST-SWANGUI' as an option. The 'CC email' field is empty and has a person icon to its right. Below the form, there is a text input area with '250 characters remaining.' and a 'Send' button. At the bottom left, there are three buttons: 'Add file', 'Send', and 'Discard'. At the bottom right, there is a large grey area with a plus sign icon.

- Click your name or select the project on whose behalf you want to send the data.
  - » The selected sender will appear in the sender field.
  - » If the project supervisor has entered and activated a project ID, the project ID field will appear in the job form when a project is selected.

Sender	TEST-SWANGUI	
To		
CC email		
Project identifier	TEST-SWANGUI	
250 characters remaining.		
 Add file		
 Send		
 Discard		

## 6.2 Data recipient

Data recipients receive the data and are informed via email (option) with PDF data delivery note (option) that the data is ready for download.



### Information email notifications

Data recipients within your own company or users within the portal solution receive the data and are notified via an email that the data is ready for collection.

Recipients who received the data via a dedicated data exchange system (ODETTE recipients) do not receive an email.

There are several ways to select data recipients. Add further recipients if required.

### 6.2.1 Quick selection

Quick selection by clicking the recipient field *To*: which opens a list of the last recipients used.

SWAN saves the last 15 recipients.

- Click the desired recipient.

Sender	TEST-SWANGUI	
To		
CC email		
Project identifier	TEST-SWANGUI	

**Last Receivers**

Wayne, Ronald	System operations	Goopple Inc.
Brin, Sergey	System operations	Goopple Inc.

250 characters remaining.

Add file

Send

Discard

### 6.2.2 Quick search



#### Information

You can search using the first name, last name, company, or user name (user ID) of the desired recipient.

Please use the selection via the search window to search for a project name.

Enter a search string in the recipient field **To:** (at least 3 letters) to open a hit list.

- Click the desired recipient.

Sender	TEST-SWANGUI	
To	tric	
CC email		
Project identifier	TEST-SWANGUI	


**Hits from local Server**

McMillan, Tricia	SWAN Operations	SSC-Services GmbH
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### 6.2.3 Entry in personal address book

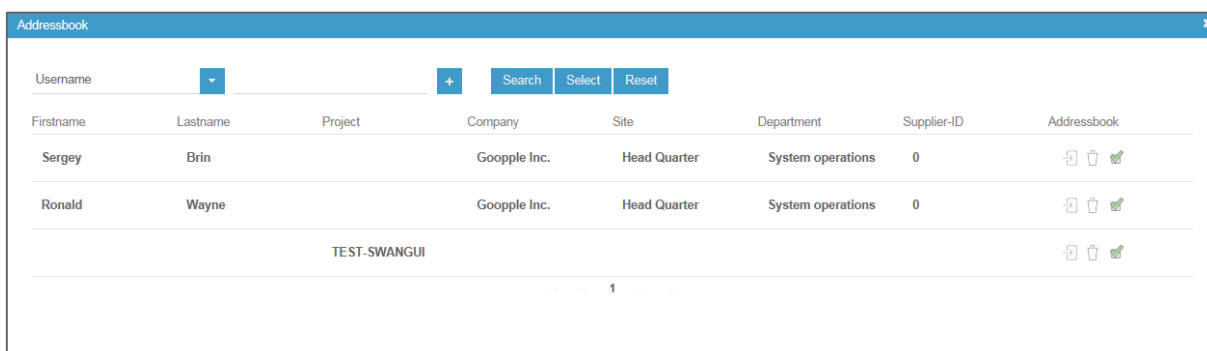
 **Information**

Every recipient to whom you have ever sent data is automatically added to your personal address book.

You can add recipients to your personal address book  or delete them from it.

- Click .


» A list of entries in your address book will appear.



- Click the desired recipient. You can select several recipients at once by holding down the CTRL key.

- Click **Select** or  in the **Address book** column.

» The selected recipient will appear in the job form in the **To:** field.

- Click  to delete an entry from the address book.

### 6.2.4 Selection via the search window

You can use the search function in the address book and save the result in the address book.

- Click .

» A list of entries in your address book will appear.

» Entries already in the address book are identified in the **Address book** column with  .

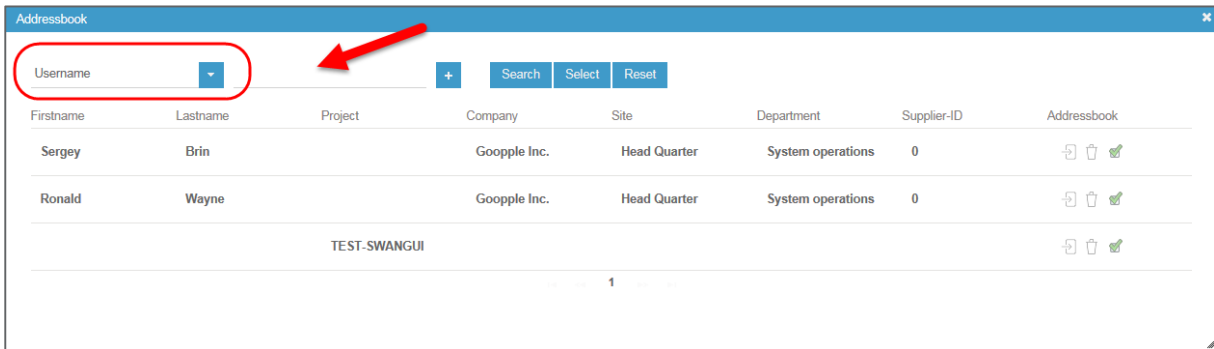
You can define the directory in which you want to search for the recipient.










- Select the desired option in the ▼ **folder** list (default: local server).




You can use the search function and combine search criteria.


- Select the search criterion in ▼ (name, company, location, department, etc.) and fill in the search field. To add additional filters, click the plus symbol.



Firstname	Lastname	Project	Company	Site	Department	Supplier-ID	Addressbook
Sergey	Brin		Goopple Inc.	Head Quarter	System operations	0	  
Ronald	Wayne		Goopple Inc.	Head Quarter	System operations	0	  
TEST-SWANGUI							  

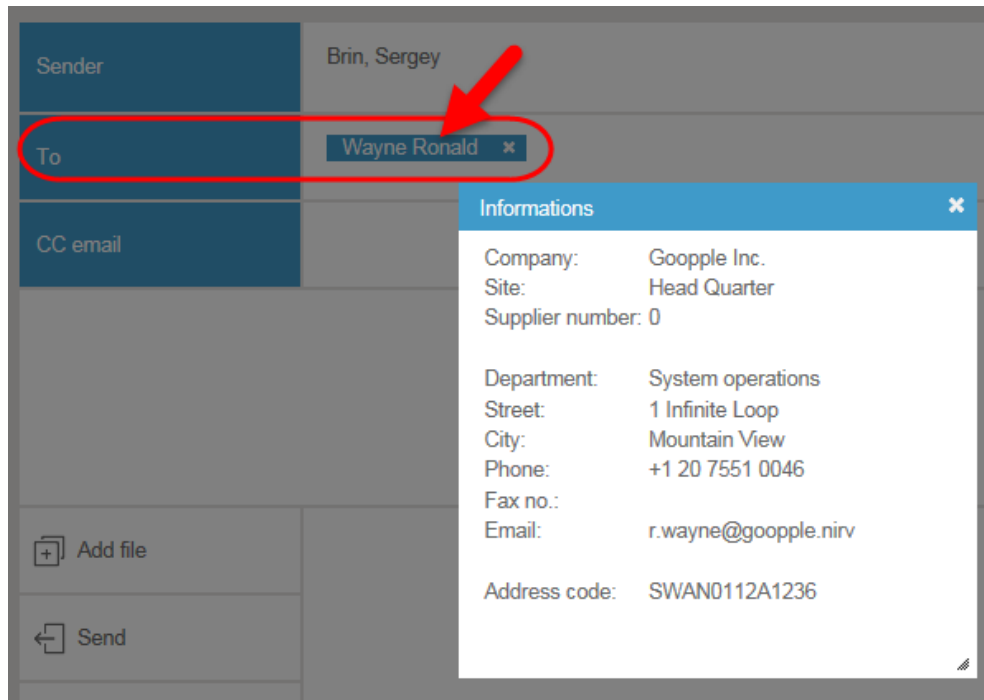
- Click **Search** or confirm with [ENTER].
  - » A list with the search results appears.
  - » Entries already in the address book are identified in the Address book column with  .
- Select the required recipient. The selected recipient is highlighted with a coloured background.
- Click **Select**.
  - » The selected recipient will appear in the job form in the **To:** field.

Or:

- Click the  **Address book** column.
  - » The selected recipient is taken over in the address book and appears in the **To:** field of the job form.
- Add further recipients if required.
  - » Press and hold the CTRL key to simultaneously select several recipients and take them over in the **To:** field or address book.

### 6.2.5 Querying recipient details

- In the recipient field, click the name of the recipient to receive detailed information on the recipient.



## 6.3 CC email recipient

CC email recipients do **not** receive any data, they are simply notified about the data transmission via an email with a data delivery note.

You can:

- Create and delete CC email addresses,
- Search for saved CC email addresses,
- Add a CC email address as a CC email recipient to the send job.

It is possible to do a quick search by entering a search string in the CC email field, just as when selecting a data recipient. Proceed as described in chapter 5.3 Quick search.



### Information

If you create CC email addresses yourself, you can edit the first name, last name, email and additional information. The information in the other columns is shown if the recipient is included in the database and cannot be edited.

- In the *CC email* line click .

- » The selection window for managing the CC email addresses pops up.
- » You can add new entries and edit existing entries.

CC-Addressbook											
Username				+		Search		Reset		New Entry	
Firstname	Lastname	Email	Additional information	Project	Company	Site	Department	CC-Addressbook	Edit		
Tricia	McMillan	t.mcmillan@ssc-services.de									
Ronald	Wayne	r.wayne@goopple.									

## 6.4 Project ID

If you send data on behalf of a project, the saved project name will automatically be entered here.

You can also enter any text you like when sending an email, similar to the process for the subject line.

## 6.5 Client (option)

You can optionally enter a client when creating a job if you are sending data on behalf of another person.

By default, the name of the user who is logged in is entered here.

- Search for your client via the linked address book (Who-is-who)  .

The search function is similar to that for your personal address book or the CC email address book.

## 6.6 Process

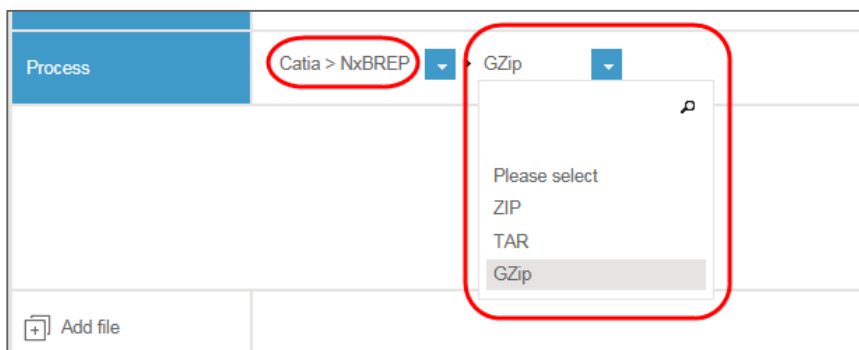
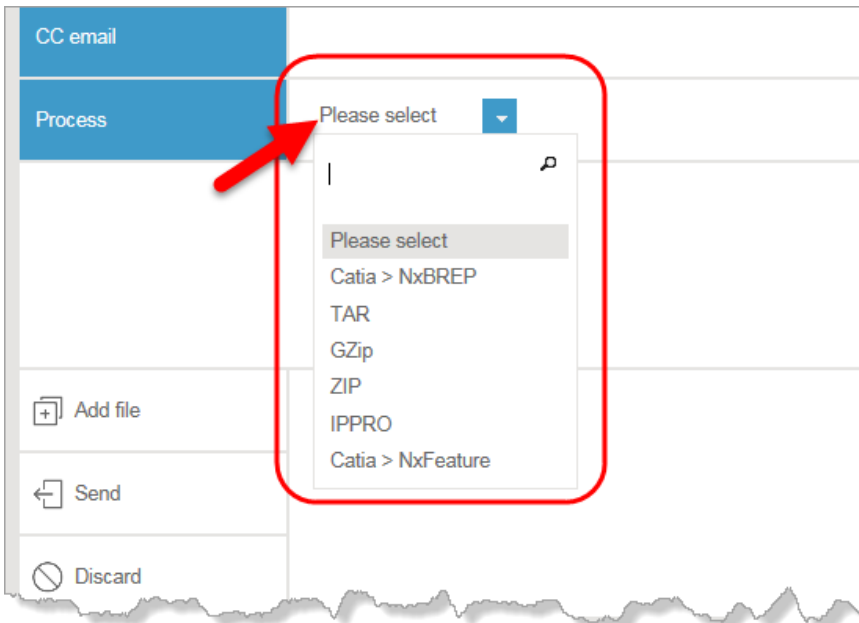


### Information

Depending on the processes supported in your SWAN version, you can choose various processing options for your data.

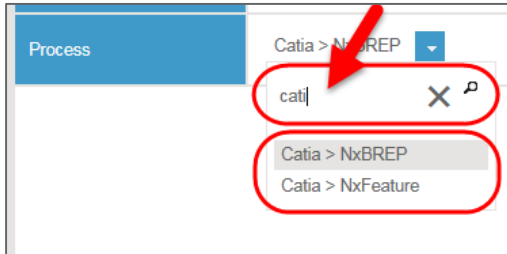
### 6.6.1 Send options - General

- Select the required process step.
  - » The selection will be taken over.
  - » You can then select further process steps.
  - » However, the selection option is limited to the remaining possible options.



 **Information**

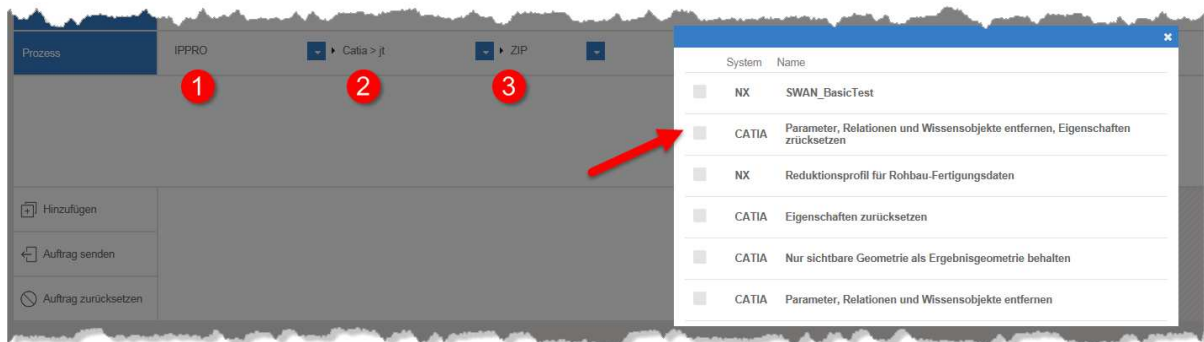
You can search for possible options using the search field with the magnifying glass.



### 6.6.2 Send option – Process step *IPPro*

You can select the process step *IPPro* in order to reduce the design and production knowledge that makes its way directly into the CAD models when using CAD systems like CATIA or NX. Afterwards, you can then select the required reduction profile.

- Select the process step *IPPro*, the desired converting and required data compression method.
- The *IPPro Profile Selection* window pops up.
- Place a checkmark next to the required profile.



## 6.7 Offline

With SWAN, you have an option to exchange data via an encrypted data carrier (CD/DVD). This can become necessary if the recipient does not have his/her own OFTP system or if the data volume is too large for transmission via Odette/ISDN.

An offline administrator can both generate media as well as read received media and forward the data to a recipient in SWAN.

### 6.7.1 Generating an offline job

The selection of the recipient and files is performed in the same way as for a normal job.

- Select the data recipient and files that are to be sent.
- Select the required medium and the offline administrator.



- Click **Send Job**.
  - » An ISO image file is created and sent to the offline administrator.
  - » The offline administrator creates the medium.

If the data is encrypted, the client for the offline job will receive an email with a password and the recipient of the medium will receive a so-called private key. These two components form the key required to read the data.

### **6.7.2 Decrypting content at the recipient**

With the aid of a client that is stored on every medium in addition to the user data, the recipient has access to a user-friendly interface for decrypting and – if required – automatically unzipping the data. To do this, the user needs to be sent the corresponding password by the client. Then he/she can access the data for further processing.

### **6.7.3 Reading from a storage medium**

The offline administrator can read data from a data carrier into SWAN and send the data to a recipient. Here, an Odette job with all features is generated, which can be searched for in SWAN.

## **6.8 Send time**


You can select a send time here. By default, jobs are sent immediately.

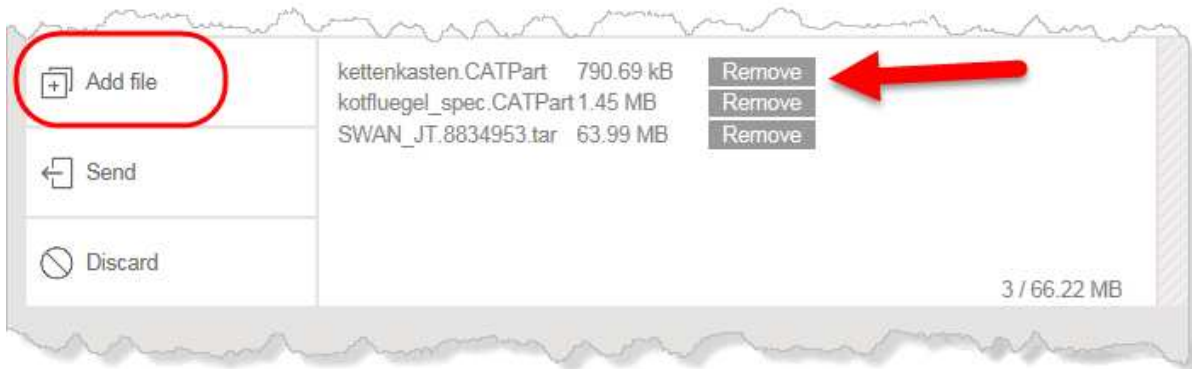
## **6.9 Additional text**

You can enter additional information for the recipient of the data here.



## 6.10 Add file from file system

- Click **Add file** .
  - » The selection window *File to upload* will appear.
- Select:
  - An individual file by double clicking it or by clicking it and then on *Open*.
    - » The file is added to the selection window.
  - Multiple files by clicking CTRL/SHIFT and clicking *Open*.
    - » The files are added to the selection window.
- Add further files if required.



With the aid of *Remove* at the end of the line, you can individually delete files from the job list.

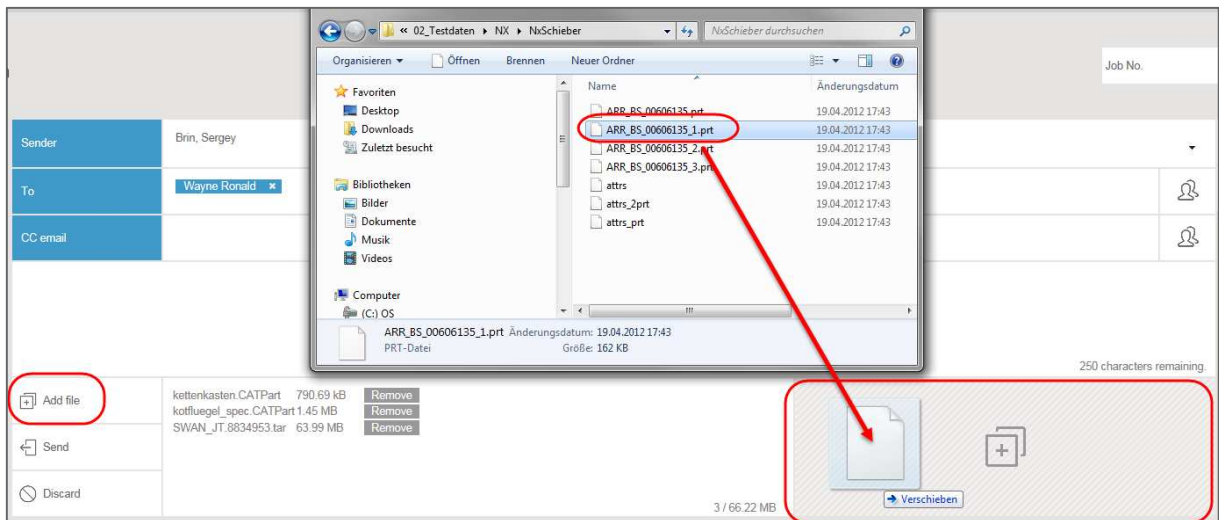
## 6.11 Add file via drag & drop

You can also add files from an open Explorer window by pulling them into the selection window to the drag & drop area.

- Open Windows Explorer and navigate to the desired files.

- Pull the individual file or several selected files to the hatched drag & drop area. 

» The files are added to the selection window.



### Information

When you click on the drag&drop area the *select file for upload* dialog is opened. You can select and add files as described in chapter 6.10.


## 6.12 Send

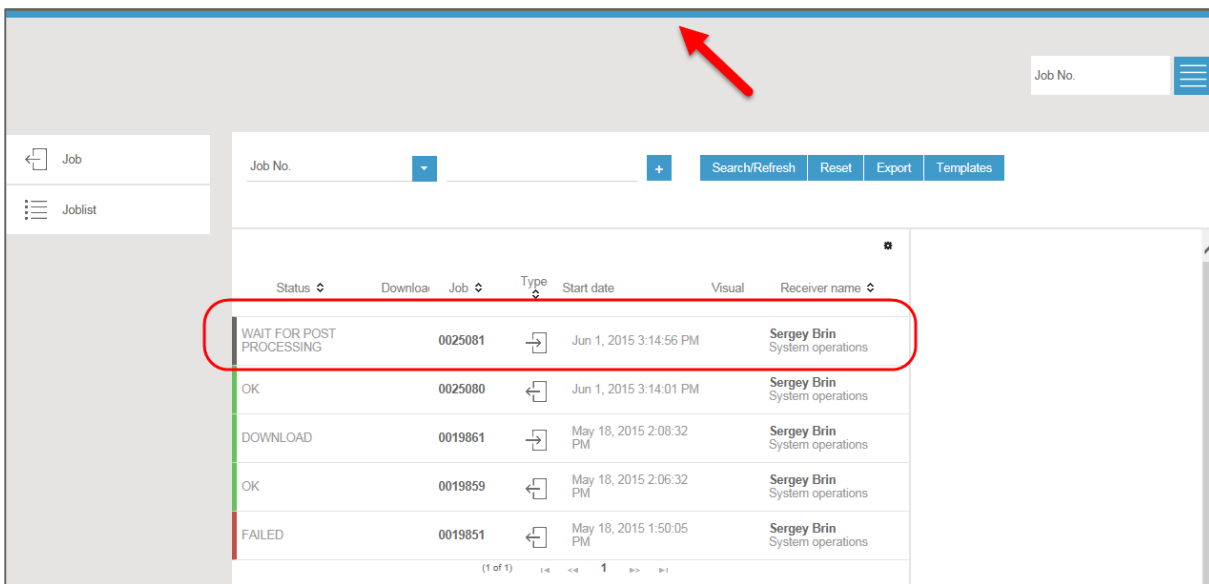


### Information

Data is uploaded and downloaded in SWAN with the function integrated in the browser.

When you have added all files to the job and selected the required preparation options, you can finish off job creation.

- Click **Send job** 
  - » The job is processed and the files are sent out.
  - » The **job list** view then appears.
  - » The progress bar at the top edge shows you the data transfer progress when uploading or downloading.




Status	Download	Job	Type	Start date	Visual	Receiver name
WAIT FOR POST PROCESSING		0025081		Jun 1, 2015 3:14:56 PM		Sergey Brin System operations
OK		0025080		Jun 1, 2015 3:14:01 PM		Sergey Brin System operations
DOWNLOAD		0019861		May 18, 2015 2:08:32 PM		Sergey Brin System operations
OK		0019859		May 18, 2015 2:06:32 PM		Sergey Brin System operations
FAILED		0019851		May 18, 2015 1:50:05 PM		Sergey Brin System operations

- » Information on the job and possible functions will appear on the right after you have selected the job by clicking it.
- » The selected job is highlighted in colour.



### Information

When you show the column **Download** in the job list the  icon shows you that a job sent by you has been downloaded by the recipient. Move the mouse over the icon and receive details on the download date.

Job No. 
+ Search/Refresh Reset Export Templates

Status	Job	Type	Start date	Visual	Receiver name																	
WAIT FOR POST PROCESSING	0025081		Jun 1, 2015 3:14:56 PM		Sergey Brin System operations	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="float: right;">: Functions</span> </div>																
OK	0025080		Jun 1, 2015 3:14:01 PM		Sergey Brin System operations	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="float: right;">: Content</span> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <thead> <tr> <th>File name</th> <th>File count</th> <th>File type</th> <th>File size</th> </tr> </thead> <tbody> <tr> <td>✓ kettenkasten.CATPart SWN_20150601151401_25080_3_3_397d97a9-5fd5-4305-89c3-f...</td> <td></td> <td>CATIA V5</td> <td>790.69 KB</td> </tr> <tr> <td>✓ kotfluegel_spec.CATPart SWN_20150601151401_25080_3_2_a2233e97-cb03-4a31-9b37-4...</td> <td></td> <td>CATIA V5</td> <td>1.45 MB</td> </tr> <tr> <td>✓ SWAN_JT_8834953.tar SWN_20150601151401_25080_3_1_ce3f8e83-def68-42bc-8d79-4...</td> <td></td> <td>JT TAR Container</td> <td>63.99 MB</td> </tr> </tbody> </table>	File name	File count	File type	File size	✓ kettenkasten.CATPart SWN_20150601151401_25080_3_3_397d97a9-5fd5-4305-89c3-f...		CATIA V5	790.69 KB	✓ kotfluegel_spec.CATPart SWN_20150601151401_25080_3_2_a2233e97-cb03-4a31-9b37-4...		CATIA V5	1.45 MB	✓ SWAN_JT_8834953.tar SWN_20150601151401_25080_3_1_ce3f8e83-def68-42bc-8d79-4...		JT TAR Container	63.99 MB
File name	File count	File type	File size																			
✓ kettenkasten.CATPart SWN_20150601151401_25080_3_3_397d97a9-5fd5-4305-89c3-f...		CATIA V5	790.69 KB																			
✓ kotfluegel_spec.CATPart SWN_20150601151401_25080_3_2_a2233e97-cb03-4a31-9b37-4...		CATIA V5	1.45 MB																			
✓ SWAN_JT_8834953.tar SWN_20150601151401_25080_3_1_ce3f8e83-def68-42bc-8d79-4...		JT TAR Container	63.99 MB																			
DOWNLOAD	0019861		May 18, 2015 2:08:32 PM		Sergey Brin System operations																	
OK	0019859		May 18, 2015 2:06:32 PM		Sergey Brin System operations																	
FAILED	0019851		May 18, 2015 1:50:05 PM		Sergey Brin System operations	<div style="border: 1px solid #ccc; padding: 2px;"> <span style="float: right;">: History</span> </div> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 5px;"> <tbody> <tr> <td>Jun 1, 2015 3:14:01 PM</td> <td>Created Job with ID:25080</td> </tr> <tr> <td>Jun 1, 2015 3:14:30 PM</td> <td>Start job processing</td> </tr> <tr> <td>Jun 1, 2015 3:14:55 PM</td> <td>Determine next ProcessStep [Checkpoint - before conversion] with weight [5.0]</td> </tr> <tr> <td>Jun 1, 2015 3:14:55 PM</td> <td>Determine next ProcessStep [Checkpoint - before compress] with weight [5.0]</td> </tr> <tr> <td>Jun 1, 2015 3:14:55 PM</td> <td>Determine next ProcessStep [Checkpoint - job metadata] with weight [5.0]</td> </tr> </tbody> </table>	Jun 1, 2015 3:14:01 PM	Created Job with ID:25080	Jun 1, 2015 3:14:30 PM	Start job processing	Jun 1, 2015 3:14:55 PM	Determine next ProcessStep [Checkpoint - before conversion] with weight [5.0]	Jun 1, 2015 3:14:55 PM	Determine next ProcessStep [Checkpoint - before compress] with weight [5.0]	Jun 1, 2015 3:14:55 PM	Determine next ProcessStep [Checkpoint - job metadata] with weight [5.0]						
Jun 1, 2015 3:14:01 PM	Created Job with ID:25080																					
Jun 1, 2015 3:14:30 PM	Start job processing																					
Jun 1, 2015 3:14:55 PM	Determine next ProcessStep [Checkpoint - before conversion] with weight [5.0]																					
Jun 1, 2015 3:14:55 PM	Determine next ProcessStep [Checkpoint - before compress] with weight [5.0]																					
Jun 1, 2015 3:14:55 PM	Determine next ProcessStep [Checkpoint - job metadata] with weight [5.0]																					

: Contact data

Sender	Receiver

### 6.13 Discard - Reset job

You can delete the entries in the job form and reset it to the default settings.

- Click **Discard**.

» The entries in the input fields are deleted or reset to the default settings.

## 7 Project function

Project supervisors and their deputies will still have access to the *Project* and *Settings* tabs in the user interface for the previous version (*Extras > Switch to old Gui* menu) in order to manage their projects.

Here you can see the projects you are a member of and, depending on your rights, manage projects or, for example, add project members.



### Project function info

The *Project* tab is displayed only for persons who are responsible for a project and their deputies.

The **project function** enables you to send out data on behalf of a project.

The *Sender* field in the *Job* view is only shown if you are assigned to a project.

You can see if you are a project member under *Extras > My profile* in the **Permissions** section.

Corresponding rights are required for creating and managing projects, and these are assigned by the System Administrator.



### Information

On the *Settings* tab in the old user interface, you can set up the presets for the default project and for displaying the project ID when sending out jobs.

- Enter the required presets here.

The screenshot shows the 'Job' view interface. The 'Sender' field is highlighted with a red circle and contains the text 'Brin, Sergey'. A red arrow points to a dropdown arrow next to the 'Sender' field. The dropdown menu is open, showing two options: 'Brin, Sergey' and 'TEST-SWANGUI', both highlighted with a red circle. Below the dropdown menu, there is a 'CC email' field with a person icon. At the bottom of the form, there are three buttons: 'Add file', 'Send', and 'Discard'. A shaded area with a plus icon is also visible.

When creating a new job, all users assigned to a project can enter as the sender a project sender and a project ID.

If the job has been fully worked through after transmission, it is displayed in the outgoing list of all project members.



Here you can search for Projects. ?

**Actions**

[My Projects](#)  
Create Project

**Search result**

Name	Description	Actions
Test-SWAN		

- Select the required entry.

Ihre Suche ergab 11 Treffer. ?

**Aktionen**

[Meine Projekte](#)  
[Projekt erstellen](#)

**Suchkriterien**

Projektname

Mitgliedsname

Mitgliedsvorname

**Suchergebnis**

Name	Beschreibung	Aktionen
Test	Weiteres Tesprojekt	
Test		
Test		
NeuesProjekt-Test	Neues TestProjekt.	
Test		
SMA-Test-Projekt		
Test-Projekt I		
TEST-PROJEKT-VK		
test_	Projektverantwortlicher ist	
Testprojekt		
Testprojekt		

- In the **Actions** column, click next to the required entry.
  - » The data appears on the **Project data** tab.
  - » You can add or delete project members and change the role in the project.
  - » A project logbook appears in an area on the right-hand side.  
Here, you can receive information about the project management.
  - » In the **Actions** area on the left-hand side, you can select from the actions available at this level.
- Edit the entries and click **Save**.

Job   Outgoing   Incoming   Offline   Settings   Admin   **Project**

Projects are connected logically to servers. You can assign responsible persons and users.

**Actions**

[Back](#)  
[Delete Project](#)

**Project Data**

Name\*

E-mail

Cost Center\*

Address Code

Active

Description

Name	Role	Will be informed via email	Recipient of Offline Jobs	Actions
<input type="text"/>	<input type="text" value="Responsible person"/>	<input type="checkbox"/>	<input type="checkbox"/>	
Maik Muster	<input type="text" value="Member"/>	<input type="checkbox"/>	<input type="checkbox"/>	

**Project**

Test-SWAN

**Project logbook**

## 7.2 Creating a project

A user requires the business role *project definition* in order to create and manage projects.

This business role is assigned by the System Administration.

When creating a new project, you need to enter a project name and a cost centre. The name of the project can be freely chosen. Since a project name is visible to all SWAN users, you must make sure that the project name is not subject to a requirement for secrecy.

In addition, you must assign a responsible person to the project from the SWAN partner data and allocate the role of **responsible person** to him/her.

- Activate the *Project* tab.
- In the *Actions* area, click *Create Project*.
  - » An empty input window pops up on the *Project Data* tab.
- Edit the entries and click *Save*.
- Add a user and assign the role of **responsible person** to him/her.
- Click *Add Member* to select further project members and assign the role of **Deputy** or **Member** to them.
- Click *Save*.



**Actions**

[Back](#)

**Project Data**

Name\*

E-mail

Cost Center\*

Address Code

Active

Description

Name	Role	Will be informed via email	Recipient of Offline Jobs	Actions
Maximilian Mustermann	<div style="border: 1px solid gray; padding: 2px; display: inline-block;">                     Please select                      Responsible person                      Deputy                      Member                 </div>	<input type="checkbox"/>	<input type="checkbox"/>	

## 8 Job list view

You can manage your incoming and outgoing jobs in the *Job list* view.

### Information

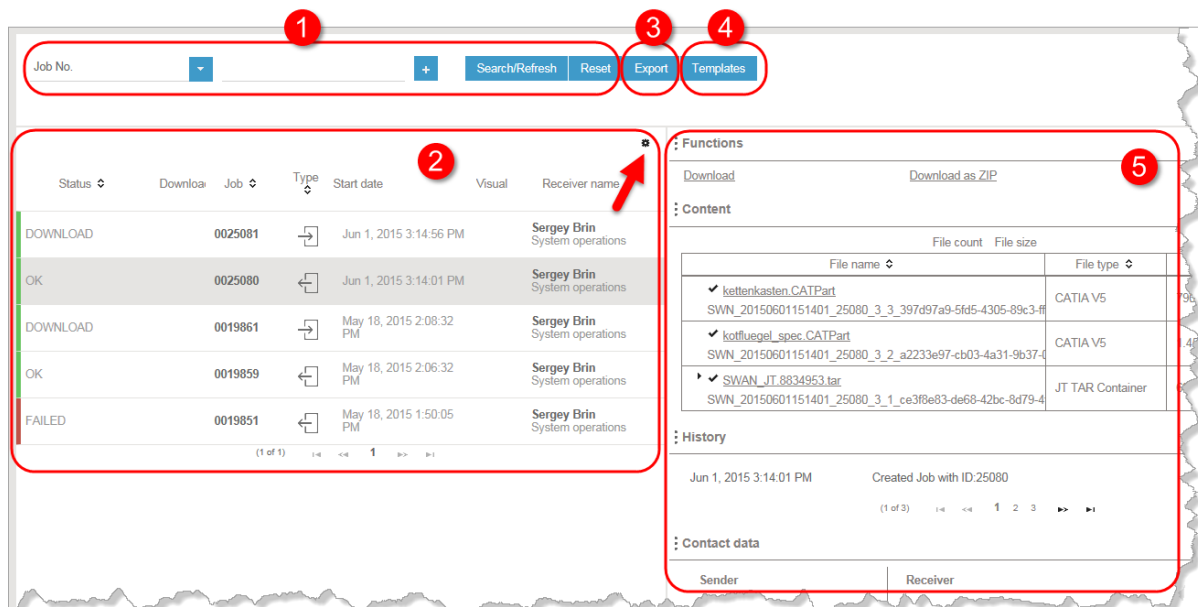
The number of jobs shown on the screen is adapted to the size of the screen.

You can navigate through the list using the navigation arrows at the bottom edge of the list.



- Activate the *Job list* tab.

» A job overview will appear.



- 1 Search for jobs
- 2 View (filtered) job list
- 3 Export selected columns from the job list to Excel file
- 4 Create, manage, and use search templates
- 5 Information on the job and possible functions (job selected by clicking it)

You can influence the job list view with the icon in the right top corner of the list (section 2).

## 8.1 Configuring columns in the job list



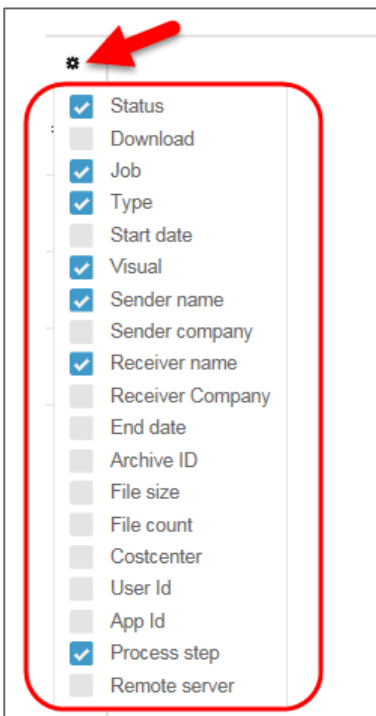
### Information

Depending on the column type, you can sort the list by clicking the column header.

The horizontal arrangement of the columns can be moved around with the mouse.

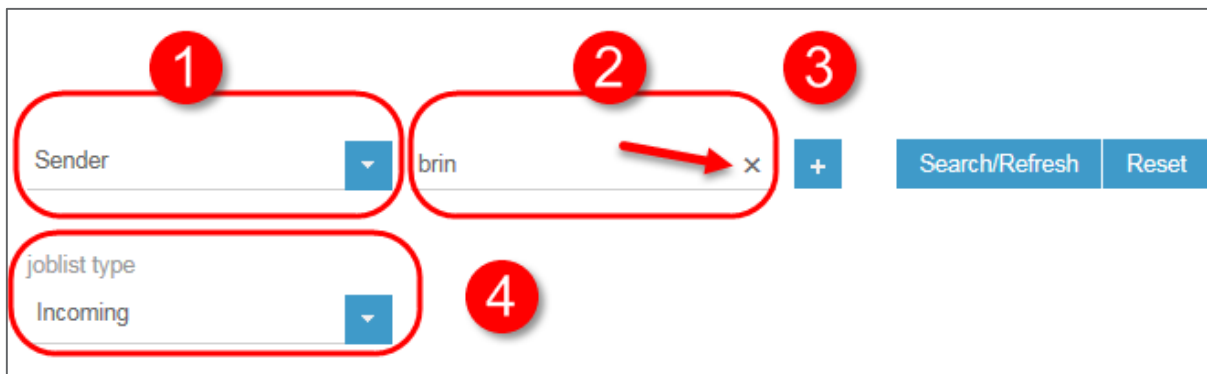
You can define which columns in the job list should be shown or hidden.

- Activate the *Job list* view.
- Click the icon in the top right corner of the list.
- Activate the appropriate checkboxes.
  - » The selection will be saved.

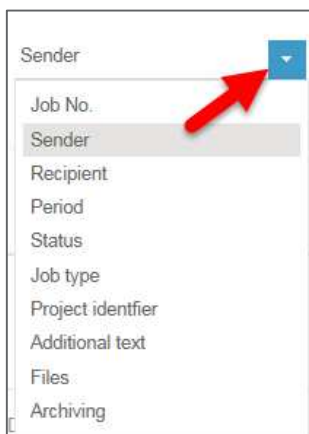


## 8.2 Searching through the job list

You can search through the job list using various criteria and create a search template that can be selected in the future or used as the default for searches.

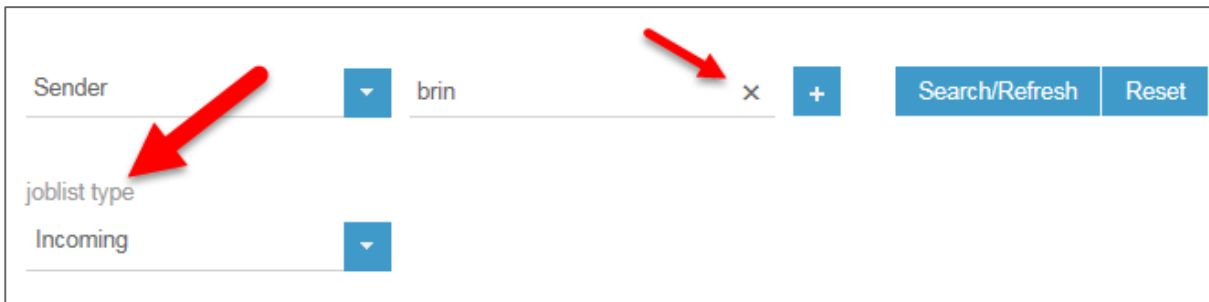


You can select various search criteria in the selection list (1):



- Job number
- Job list type (outgoing, incoming, offline)
- Sender  
(first name, surname, user name, project name, department, site and company of the sender)
- Recipient  
(first name, surname, user name, project name, department, site and company of the recipient)
- Job time period
- Status
- Job type (SWAN, Smaragd, ...)
- Project ID
- Additional text
- Files (file name)
- Archiving status

- Activate the *Job list* view
- Select the search criterion (1), e.g. *Job list type* and select the option in the drop-down menu or enter e.g. the search string in the search field under *Sender* (2).
  - » The search criterion with the entered value will be added to the search (4) and removed from the selection list.
- Click *PLUS* (3), to add an additional search criterion to your search.
- Proceed accordingly until you have selected all of the desired search criteria.
- Click **X** to delete the entered search string (to do this, the cursor must be in the entry field) or on the search criterion to remove it from the search.



The screenshot shows a search interface with two search criteria. The first criterion is 'Sender' with a dropdown arrow and the value 'brin'. The second criterion is 'joblist type' with a dropdown arrow and the value 'Incoming'. To the right of the search criteria is a search bar containing 'x' and a '+' button. To the right of the search bar are two buttons: 'Search/Refresh' and 'Reset'. Red arrows point to the 'Sender' dropdown, the 'x' button, and the 'joblist type' dropdown.

- Click *Search/Refresh*.
  - » The search will be done.
  - » An appropriately filtered job list will appear.

## 8.3 Using search templates

### 8.3.1 Creating a search template

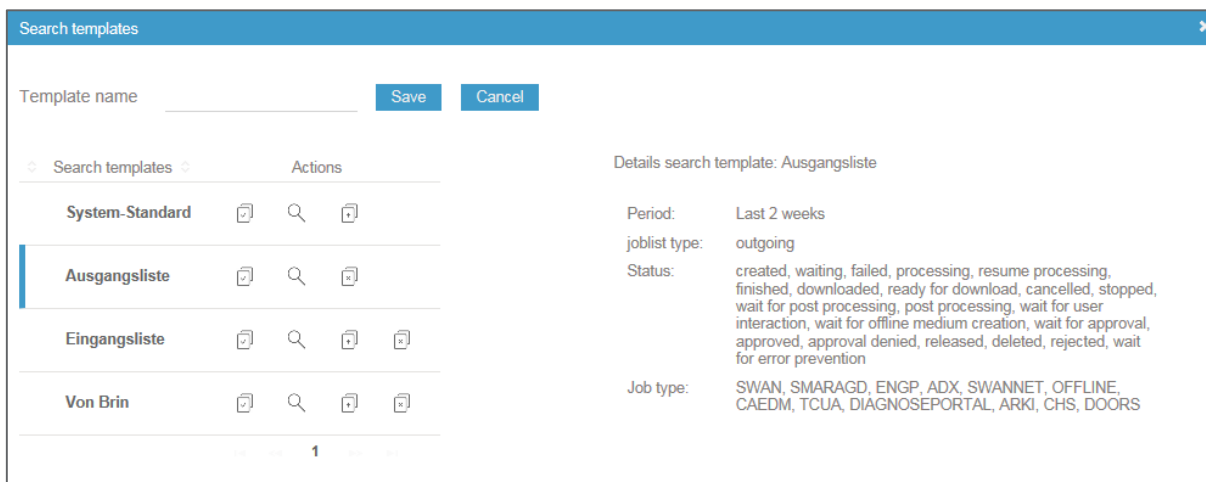


#### Information

You can identify an active search template by the coloured bar at the left edge of the template name.


The system default template that is always available shows you all of the jobs from the last two weeks.

You can save search criteria in a search template for use in future searches and use the template by default for future searches.



- Perform the search with the desired search criteria.
- To save the search criteria, click **Templates**.
  - » The selection window **Search templates** appears.
  - » Search templates that have already been saved are displayed. Details on the available search

templates can be found by clicking the **magnifying glass** .

- Select a suitable name for the search template.
- Click , if you would like to use the template as the default for future searches.
  - » The default search template is identified by a coloured bar on the left edge.
- Click **Save**.

### 8.3.2 Managing search templates

You can select saved search templates from the list and make them the default search template




or delete search templates



by clicking the appropriate icon.


- Click *Templates* to manage the saved search templates.
  - » The selection window *Search templates* appears.
  - » Search templates that have already been saved are displayed.
  - » The default search template is identified by a coloured bar on the left edge.

- Click the *magnifying glass*  to receive information on a search template.

### 8.3.3 Using a search template for a search

Saved search templates can be selected and used for a search.

- Click *Templates* to select a saved search template.
  - » The selection window *Search templates* appears.
  - » Search templates that have already been saved are displayed.
  - » The default search template is identified by a coloured bar on the left edge.

- Click the *magnifying glass*  to receive information on a search template.

- Click  if you want to use the template for your search.

- » The search will be done.
- » An job list filtered according to the template will appear.
- » The filter criteria are shown and you can add or delete further search criteria to filter the list even further.

### 8.3.4 Discarding search templates

You can delete the entered search criteria and reset the search to the default search template.

- Click *Discard*.
  - » The entered search criteria will be deleted.
  - » The search will be done using the search template identified as the *default* (indicated by a coloured bar).
  - » The filter criteria are shown and you can select or deselect further search criteria to filter the list even further.



## 8.4 Retrieving functions and information about the jobs



### Information

The job list is only for viewing purposes.

Information on a job can only be viewed and possible functions only selected once you have selected the job.

Functions and information are shown on the right side of the *Job list* view only for the job shown in *colour*.

**Functions**

Download Forward  
Visualize

**Content**

File name	File count	File size	File type	File size
<input checked="" type="checkbox"/> kotfluegel_spec.CATPart ENG15051114225622594002002			CATIA V5	1.45 MB

**History**

May 11, 2015 2:28:00 PM Start job processing  
 May 11, 2015 2:28:08 PM Wait for asynchronous processing  
 May 11, 2015 2:28:08 PM Finish processing with status [WAITING]


(1 of 6)

**Contact data**

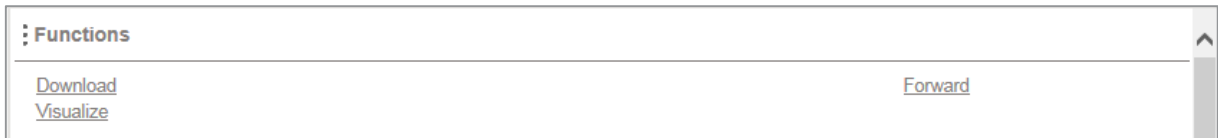
Sender	Receiver
Test-Projekt_CC	
Address code: MB05901T28098	Daimler AG Werk 059 - Sindelfingen
Description: Test-Projekt	ITP/DP Supplier number: N/A
	.com
	Address code: MB05901T22594

**Additional Information**

Project Identifier	Test-Projekt_CC
Sending time	Now

- Click in the line of the desired job.
  - » The selected job is shown in *colour* in the job list.
  - » Possible functions and information on the job then appear on the right side.
  
- Adjust the order of the view to fit your needs by moving the three dots  to the left of the section designation up or down.

### 8.4.1 Functions



### 8.4.2 Content

: Inhalt					
		Anzahl der Dateien	Größe		
Dateiname	Filetyp	Größe	PDQ		
<ul style="list-style-type: none"> <li>▶ ✓ SWAN_JT.8834953.tar</li> <li>ENG15052013233222623002002</li> </ul>	JT TAR Containe	63.99 MB		◀▶	

- Show the content of a tar container by clicking on ▶.
  - » A list of the files included in the tar container is displayed with file type and size.
  
- Close the list by clicking on ▼.



#### Information

Files with a hook in front of the filename are selected for download. Remove the hook if you do not want to download a specific file.

### 8.4.3 History

: Auftragshistorie	
18.05.2015 14:09:00	Start job processing
18.05.2015 14:09:00	Determine next ProcessStep [Prepare incoming job] with weight [5.0]
18.05.2015 14:09:02	Finish main processing of job [19861] with status FINISHED
18.05.2015 14:09:02	Dispatch job for post processing
18.05.2015 14:09:03	Finish processing with status [WAIT_FOR_POST_PROCESSING]
(1 of 2)     <   <<   1   2   >>   >	

### 8.4.4 Contact data

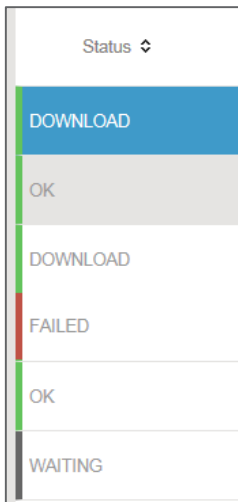
: Contact data	
Sender	Receiver
Sergey Brin	Sergey Brin
Goopple Inc.	Goopple Inc.
Head Quarter	Head Quarter
System operations	System operations
Supplier number: N/A	Supplier number: N/A
Street: 1 Infinite Loop	Street: 1 Infinite Loop
City: Mountain View	City: Mountain View
Phone: +1 20 7551 0044	Phone: +1 20 7551 0044
Fax no.: N/A	Fax no.: N/A
Email: s.brin@goopple.nirv	Email: s.brin@goopple.nirv
Address code: SWAN0112A1234	Address code: SWAN0112A1234

### 8.4.5 Additional Information

: Additional Information	
Sending time	Now
Availability of data	The data is available
Application ID	SWAN
Job priority:	5
PDQ	

## 8.5 Recognizing the job status

The status of your job is indicated in the status column by a coloured bar and a status word.

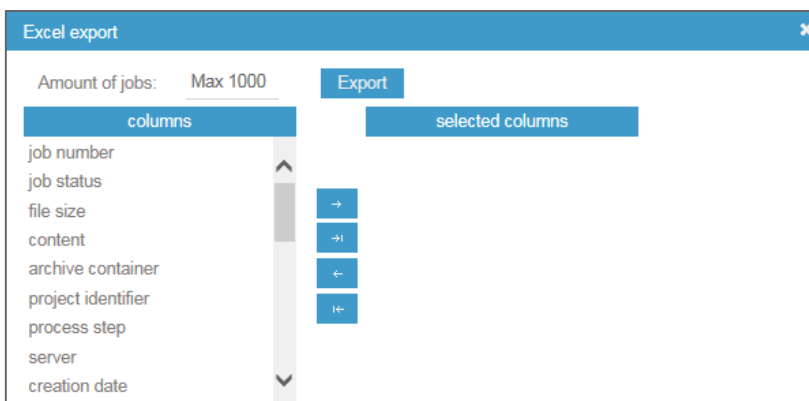


Additional information on the job will appear on the right side after you have selected the job by clicking in the line and it is shown in colour.

## 8.6 Exporting the job list

You can export the job list into an Excel file.

- Click **Export**.
  - » The selection window for exporting to an Excel file appears.
- Select the number of jobs and add the columns desired for the export to the selection list.



- Click **Export**.
  - » An Excel file will be generated with the selected columns.

## 8.7 Downloading a job

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### Information

Uploading and downloading files is done via a function integrated in the browser.

When downloading, the files are downloaded to the download directory set in the browser and saved there.

- Adjust the download directory in your browser, if needed.
  - Make sure that sufficient storage space is available.
- 

Data recipients are informed of incoming data via an email with a data delivery note and can access the received data after they select the job in the job list.



- Activate the **Job list** view.
- Use the suitable search window to filter extensive job lists by certain criteria.
  - Quick search, e.g. if you know the job number, ► chapter 5.3
  - Search with a combination of search criteria, ► chapter 8.2
  - Search templates, ► chapter 8.3
- Select the desired job from the job list.
- If the job contains several files, you can select specific files in the **content** area. Remove the hook in front of the filename if you do not want to download a specific file.
- In the **Functions** section, click **Download**.
  - » The original file will be individually collected from the browser in the set download directory and saved there.
  - » Several/many files will be packed in a zip container and then collected and transferred to the set download directory as 1 package and saved there.



### Information

You can download the content of several jobs at once.

- Select the desired jobs in the job list.
  - Select the files for download in the content area (default: all selected).
-