



webEdition  
manage your content

## User Management PRO, Task/Messaging and Workflow





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# **User Management PRO, Task/Messaging and Workflow Modules**

## **User Guide**

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Standard 5.0.1  
June 2007

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Printed in Germany

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# About this document

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## Purpose of this document

This document treats the webEdition User Management PRO, Task/Messaging and Workflow.

You can use this manual to learn:

- what the User Management Modules are
- how to install these module
- how to use these module to create and manage the user permissions for administrators and editors on your Web development team

## Audience

This document is intended for personnel in the following groups:

- Web administrators

**Note:** The procedures described in this manual can only be performed by persons who have administrative user privileges.

- Web editors

## The webEdition customer documentation suite

The documentation team publishes new webEdition documents to support the release of all webEdition features, modules and enhancements.

You can consult our documentation suite for detailed information about the modules you have purchased or about webEdition products that you may wish to purchase in the future. All customer documentation is available in portable document format (PDF) on the webEdition documentation Web page.

## On-line reference documentation

The webEdition customer documentation suite comprises the following books, all of which you can obtain at URL: <http://www.living-e.de/>

### Standard webEdition documentation

The following books support the webEdition Standard suite:

- *The webEdition User Guide*
- *The webEdition Installation Guide*

**Documentation for webEdition modules**

The following books support the webEdition modules:

- *The Customer Management and Shop Module User Guide*
- *The Database/Object Module User Guide*
- *The Newsletter Module User Guide*
- *The User Management PRO Task/Messaging and Workflow Module User Guide*

**What precautionary messages mean**

webEdition documents include attention and caution messages, which are designed to draw your attention to important instructions.

**Attention boxes**


An attention box identifies information that is necessary for the proper performance of a specified task. For example:

**ATTENTION**

You must have the appropriate permissions in your user profile to complete this procedure. Permissions are assigned to you by your webEdition system administrator. Contact your webEdition system administrator for further details.

**Caution boxes**

Caution messages indicate that there are possible risks to your software or database if you perform a specified task without taking the suggested appropriate precautions. For example:



**CAUTION**

**Database warning**

If you complete this procedure, your database will be overwritten.

**How commands, system responses and we:tags are represented**

The commands, system responses and webEdition tags (called we:tags) used in this document conform to the following conventions.

**Web interface commands**

Commands performed through a Web browser are shown in *italic* typeface. For example:

Click on the *Save* button.

Menu-based commands performed in a Web browser are shown in *italic* typeface. Drop-down or nested menu commands are separated by an input prompt (>). For example:

Select *Customers > New* from the main menu of the Customer Management Module.

### **webEdition tags and template code**

The webEdition templates use a specialized set of programming tags based on the PHP programming language. These webEdition tags or `we:tags` are displayed in `courier` typeface and in angled brackets:

Opening tags appear thus: `<we:tag/>`

Closing tags appear thus: `</we:tag>`

The programming code used in webEdition templates is also represented in this document by `courier` typeface:

```
<we:sessionStart/>
<we:ifRegisteredUser>
Hello: <we:sessionField Last name="user name" type="print"/><br>
Logged in
</we:ifRegisteredUser>
```

### **Attribute variables**

Attributes and variables appear in *courier italic* typeface. For example:

```
<we:hidden name="attribute1">
```

## **How to check the document version and issue**

The information on the title page of this document indicates the version and issue for this publication. The version and issue also appear in the footer on every even-numbered page.

The first two digits in the document numbering scheme indicate the version. The version number increases each time the document is updated to support a new software release. For example, the first release of a document is 01.01. In the next software release cycle, the first release of the same document is 02.01.

The second two digits in the document numbering scheme indicate the issue. The issue number increases each time the document is revised and re-released in the same software release cycle. For example, the second release of a document in the same software release cycle is 01.02.

## **Customer service**

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  - Sales: [sales@living-e.de](mailto:sales@living-e.de)
  - Information/Help: [info@living-e.de](mailto:info@living-e.de)



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# 1 User Management PRO: Introduction

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This introduction is intended to help you familiarize yourself with the webEdition User Management PRO Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the User Management PRO Module. These topics are treated in the following sections:

- Section 1.1, "What is the webEdition User Management PRO Module?" on page 15.
- Section 1.2, "Installation" on page 16.
- Section 1.3, "General information and navigation" on page 16.

## 1.1 What is the webEdition User Management PRO Module?

The webEdition User Management PRO Module is designed to administer complex user structures. With this module you can set different permissions for working with documents, templates, directories and the system itself. Unlike the standard User Management Module, you can establish user groups with the PRO module. You can also create sub-groups on various levels. Each user can be assigned to individual or multiple groups.

Each individual object (text area, images) in a document can be assigned access privileges so you can precisely define which individual users or group members are permitted to create or modify a document/object. Specific workspaces and templates (in whole or in part) can be allocated to users.

### 1.1.1 User Management PRO and your organization

The User Management PRO Module allows you to assign permissions for the editing of your web site in a manner that is suitable to the structures of your company. You can grant access permissions to specified areas of your web site to specified individuals or groups within your organization. For example, you can create workspaces that correspond to the departments in your company; you can create user groups called "PR", "Sales" and "Marketing" and assign workspaces and relevant templates to them. Each group can define a department manager as a group administrator who has more permissions within his or her group. Group administrators can create sub-groups or create new users for these sub-groups. When a template administrator creates your webEdition templates, you can assign users or groups to specific portions of a document. You can, for example, allocate a text area exclusively to the "Sales" group, while only the "PR" group would be permitted to edit the pictures to go with the text area. New attributes in the we:tags have to be defined for this to be possible.

## 1.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.living-e.de>

## 1.3 General information and navigation

After installing the User Management PRO Module, the item *User management* in the *Extras* menu will start the module (see Figure 1).

**Figure 1** The *Options* menu showing *User management* command



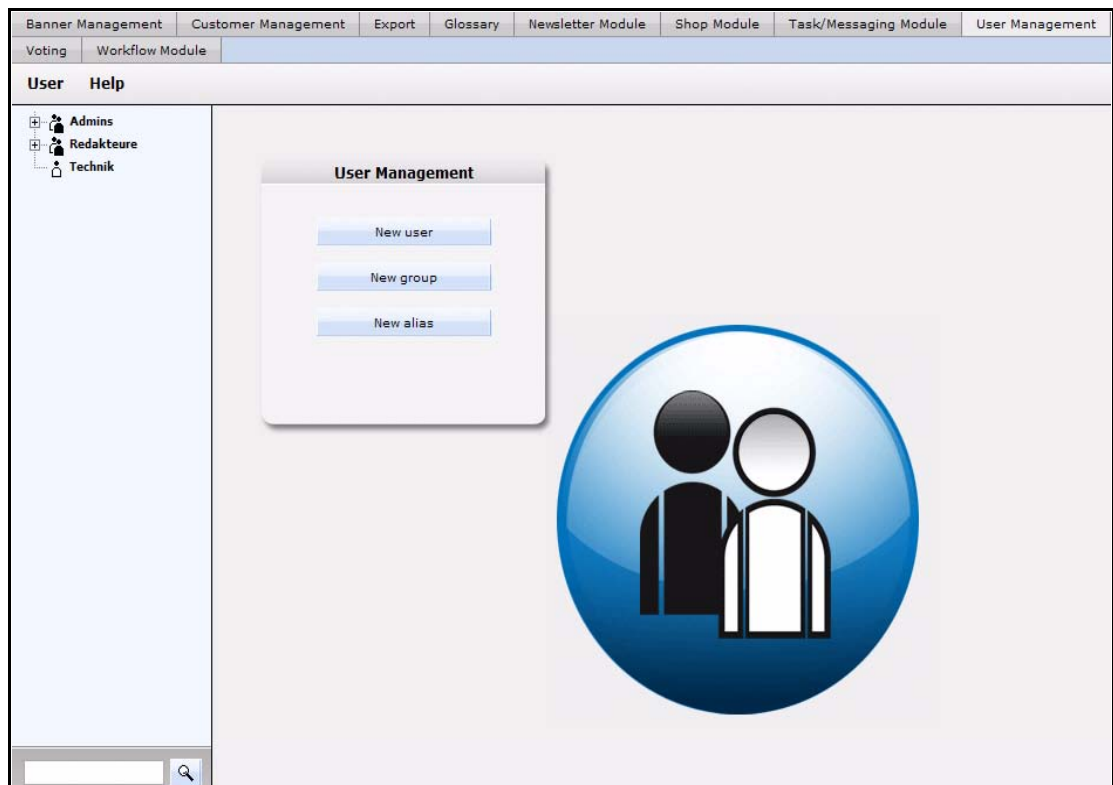
You will also see the option *User management* in the *Modules* menu (see Figure 2).

**Figure 2** The *Modules* menu



Select *User management* from the *Modules* menu to open the User Management PRO main screen. The main User Management Module page opens showing the *Quickstart* screen (see Figure 3).



**Figure 3 User Management Module: *Quickstart* screen**

Using the *Quickstart* screen, you have the option of going directly to a new user, a new group or to a new alias.

### 1.3.1 The User Management PRO *User* menu

The User Management PRO Module *User* menu has the following items (see Figure 4).

**Figure 4 The *User* menu**

- Save. This command allows you to save the current user(s), group(s), or alias(es).
- Delete. This command allows you to delete the current user(s), group(s), or alias(es).
- Exit. Use this command to exit the module.
- New. The *New* menu has the following sub-items (see Figure 4, "The User menu" on page 17):
  - User. This command allows you to create an identity for a user in the system.
  - Alias. This command allows you to create a copy of an individual user's main identity
  - Group. This command allows you to create a group or sub-group of users.

### 1.3.2 The User Management PRO explorer menu

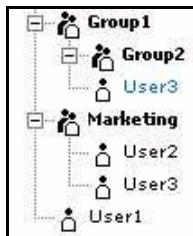
The explorer menu in User Management PRO Module is structured like the menu used for documents and templates. There are two types of icons as seen in Figure 5:

- icon of a group
- icon of an individual user

**Figure 5 Explorer menu: individual and group icons**



The group icon can represent members and sub-groups. You can view the members and the sub-groups of a group by clicking on the plus "+" icon next to a group symbol (see Figure 6). The sub-groups can also contain users and groups of their own.



**Figure 6 Explorer menu users and groups**

Since individual users cannot have any "sub-users", they are one-level in nature. Users that appear in blue colour in the explorer menu are "aliases".

### 1.3.3 The User Management PRO Module main screen

The main screen is designed to allow you to enter and change data about your users and groups. To access the main screen, go to the explorer menu and click on the user or group whose data you wish to view or change.

The edit mode of the User Management PRO Module has three tabs, *Data*, *Permissions* and *Workspace*. You can access the associated views by clicking on the respective tab (see Figure 7).



**Figure 7 User Management PRO area tabs**

Each of these views is discussed in more detail below.

#### 1.3.3.1 The *Data* view

The *Data* view stores all the personal data of a particular user (see Figure 8). Only the administrator can change this information.

**Figure 8 The *Data* view**

The screenshot shows the 'Data' view for user 'John Doe'. At the top, there are tabs: 'Data', 'Permissions', 'Workspace', and 'Preferences'. The 'Data' tab is selected. Below the tabs, there are two main sections: 'General data' and 'User data'. The 'General data' section contains fields for Salutation, First name (John), Last name (Doe), Address, House number/apartment, Zip, City, State, Country, Phone area code, Phone, Fax area code, Fax, Mobile, and E-Mail. The 'User data' section contains fields for User name (John Doe), Password, and Group (/Admins). A 'Select' button is next to the Group field. A 'Save' button is at the bottom left.

**1.3.3.2 The *Permissions* view**

The Permissions view allows administrators to allocate permissions for a user (see Figure 9).

**Note:** Your view of the *Permissions* will vary depending on what modules you have installed.

The screenshot shows the 'Permissions' view for user 'John Doe'. At the top, there are tabs: 'Data', 'Permissions', 'Workspace', and 'Preferences'. The 'Permissions' tab is selected. Below the tabs, there is a list of modules with expandable arrows (▶) next to them: Banner Module, Control permissions, Customer Management, DB/Object Module, Export, Glossary, Import-/Export permissions, Newsletter Module, Rebuild, Scheduler, Shop Module, Spellchecker, Voting, Work permissions, Workflow Module, and seeMode.

**Figure 9 The *Permissions* view**

The permissions are divided into the following options:

- "Permissions for installed modules". The webEdition modules have permissions that can be customized in the *Permissions* view of the User Management PRO Module. These options will vary depending on what modules you have installed. For

information on how to set these permissions, see the documentation for the individual modules.

**Note:** If you have not installed all modules listed in Figure 9, "The Permissions view" on page 19, you will not be able to see these permissions in User Management PRO Module.

- *Work permissions.* In this area, you can assign any permissions related to working on documents and templates.
- *Control permissions.* In this area, you can assign any right related to the administration of users and groups.

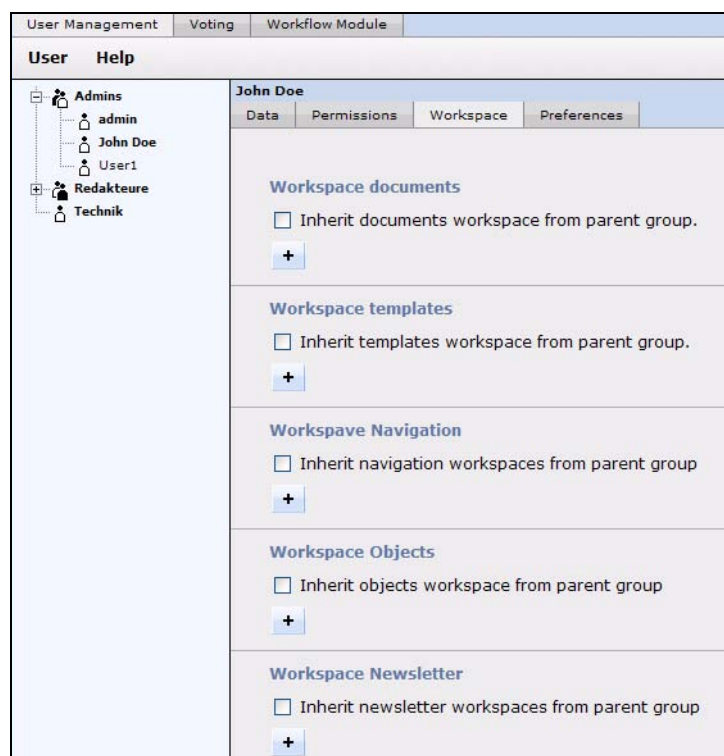
Click the arrows next to the permission options to reveal a series of check boxes indicating all the permissions that you can assign to your users.

### 1.3.3.3 The *Workspace* view

The *Workspace* view allows administrators to assign workspaces and templates to a user or group of users.

In the *Workspace* view, you can allocate users to fixed workspaces and special template sections. You can also assign more than one workspace or template section to a user by clicking on the "+" (plus) button. When users login to webEdition using the login data assigned to them in the *Data* view, the explorer menu will display only the workspaces allocated to them and they will only be able to use their assigned templates (see Figure 10).

**Figure 10** The *Workspace* view



The Workspace view has the following areas:

- *Workspace documents* and *Workspace templates*. These areas have similar user controls. The checkboxes in *Workspace documents* and *Workspace templates* sections allow you to assign to users the workspaces and templates from the groups in which they are members. The trash bin icon allows you to delete the access to workspaces and templates for a particular user.

If you activate the *Default* checkbox in the *Workspace documents* area in conjunction with the Database/Object Module, you can assign default status to the workspace for which you intend to create new objects. The default workspace is the only workspace in which you can create objects based on the classes allocated in the Database/Object Module.

- *Start document for SeeMode*.

The User Management PRO Module allows you to assign a start document to a user who logs into webEdition in Super-Easy-Edit-Mode (SeeMode). Once a specified document has been selected, that document will automatically open for the user as soon as he/she logs in. For further details about the SeeMode, see *The webEdition User Guide*.



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## 2 Creating users, groups and "aliases" in the User Management PRO Module

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This chapter is intended to show you how to create new users, user groups or aliases by using the webEdition User Management PRO module. The following topics are treated in this chapter:

- Section 2.1, "Creating a new user" on page 23
- Section 2.2, "Creating a new group" on page 26
- Section 2.3, "Administering group membership" on page 27
- Section 2.4, "Creating an alias" on page 28

### ATTENTION

Only an administrator and users who have been granted the appropriate permissions in the User Management PRO Module can create and maintain users and user groups. These options will not be available to you if you are not an administrator, or if you have not been given permission by the administrator to create, change or delete users or user groups.

### 2.1 Creating a new user

Use the following procedure to create a new webEdition user. When creating a new user you will be required to enter information in each of the areas that were described in Section 1.3.3, "The User Management PRO Module main screen" on page 18. This procedure has three parts, each part corresponds to an area (*Data*, *Permissions* or *Workspace*) in edit mode.

#### Procedure 1 Creating a new user

##### ***In the User Management PRO Module main screen (Part 1: the Data view)***

- 1 To create a new user, click *User > New > User* in the User Management PRO Module.
- 2 Select the *Data* tab.

*The system opens the Data view (see Figure 11).*

**Figure 11 The *Data* view**

- 3 Enter all user-related information in the *General data* area.
- 4 Allocate user names and passwords to new users in the *User data* area so that they can log in.
- 5 Assign the new user to a group in the *Group* section if they are to have their main identity within a group.
- 6 You have completed Part 1. Go to Part 2.

**(Part 2: the *Permissions* view)**

- 7 Go to the *Permissions* view by clicking the *Permissions* tab.  
The system opens the *Permissions* view (see Figure 12).

**Figure 12 The *Permissions* view**

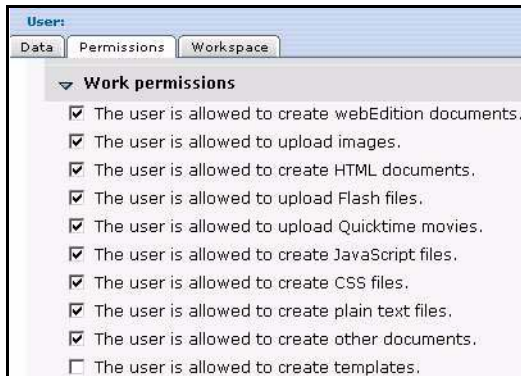
- 8 Click on the arrow next to *Work permissions* to reveal a series of check boxes indicating all the work permissions that you can assign to your users.



- 9 Assign the work permissions by selecting the appropriate checkboxes (see Figure 13 for a partial list of work permissions).

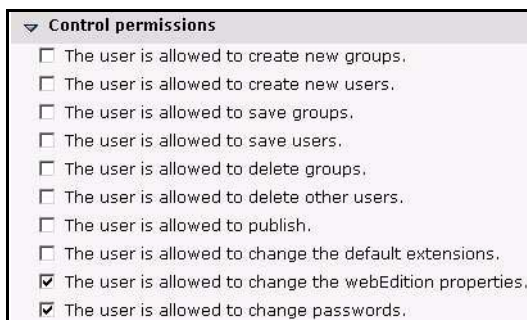
**Note:** The designation "Create" always refers to the menu item *File > New*. If any permissions are not available, the functions will be grayed out in the *File* menu.

**Figure 13 Work permissions**



- 10 Click on the arrow next to *Work permissions* to minimize the view, then click on the arrow next to *Control permissions* to reveal a series of check boxes indicating all the control permissions that you can assign to your users.
- 11 Assign the control permissions by selecting the appropriate checkboxes (see Figure 14).

**Figure 14 Control permissions**

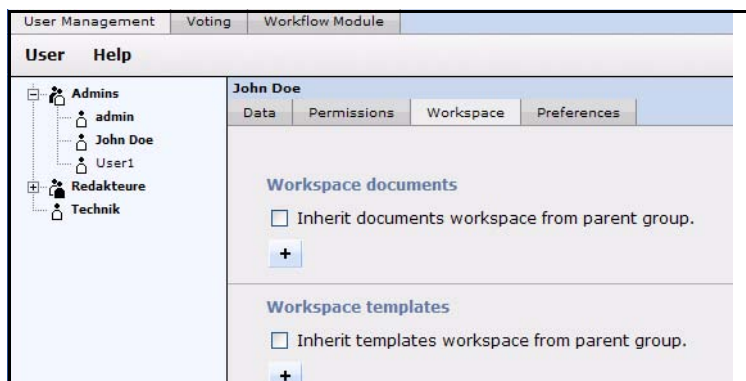


- 12 Click on the arrow next to *Control permissions* to minimize the view.
- 13 If you wish the user to have full administrative permissions, select the *Administrator permissions* check box that appears under the permission options (Refer to Figure 12, "The Permissions view" on page 24). Otherwise, leave this box unchecked.
- 14 If you want your user to inherit the existing rights from a parent group, use the last checkbox in the *Permissions* area, otherwise, leave this box unchecked.

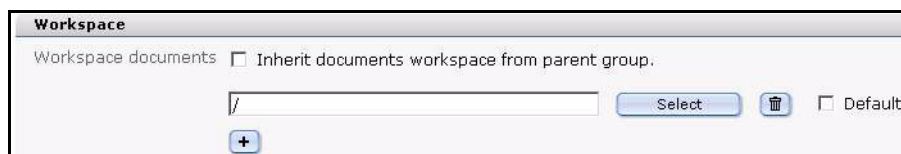
**(Part 3: the Workspace view)**

- 15 Click the *Workspace* tab.

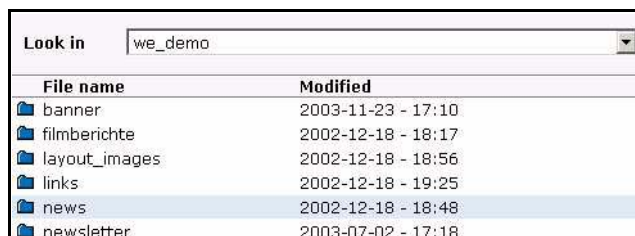
*The system opens the Workspace view as seen in Figure 15.*

**Figure 15 The *Workspace* view**

- 16 If you wish to assign to a user the same workspaces and templates that have been assigned to the group to which that user belongs, activate the checkboxes in *Workspace documents* and/or *Workspace templates*. Otherwise go to Step 17.
- 17 Click on the plus button below the checkboxes.  
*A field appears that allows you to select a workspace (see Figure 16).*

**Figure 16 Selecting a workspace**

- 18 Click the *Select* button to access a list of your directories from which you can choose the document or template you wish to assign to your user.  
*The system opens a Look in server browser (see Figure 17).*

**Figure 17 Look in server browser**

- 19 Click the appropriate folder name, then click the *OK* button.  
*The name of the workspace or template will appear in the field to the left of the Select button.*
- 20 Click the *Save* button at the bottom of the page.
- 21 You have completed this procedure.

## 2.2 Creating a new group

Use the following procedures to create a new user group. As above, in Procedure 1, "Creating a new user" on page 23, you must enter data into each of the three areas: the *Data*, *Permissions*, and *Workspace* areas.

## Procedure 2 Creating a new group

**In the User Management PRO Module main screen (Part 1: the Data view)**

- 1 To create a new group, click *User > New > Group* in the User Management PRO Module.
- 2 In the *Data* view, enter all group-related information in the *Group data* area (see Figure 18).

**Figure 18 Group data area**

**Note 1:** The new group can be assigned to an existing group as a sub-group in the Group section.

**Note 2:** A new group will not yet have any members. Therefore the *User* area under the *Group data* area will be empty.

**(Part 2: the Permissions view)**

- 3 The *Permissions* view for the creation of a new group is the same as that for an individual user, with one exception: a group can never possess administrative permissions. Go to Procedure 1, "Creating a new user" on page 23, and complete Step 7 to Step 14, then go to Step 4 of the present procedure.

**(Part 3: the Workspace view)**

- 4 The *Workspace* view for the creation of a new group is the same as that for an individual user. Go to Procedure 1, "Creating a new user" on page 23, and complete Step 15 to 17 then return to the present procedure.
- 5 Select the *Save* button at the bottom of the page.
- 6 You have completed this procedure.

## 2.3 Administering group membership

Use the following procedure to add, change or delete members in a group.

### Procedure 3 Adding and editing group members

**In the User Management PRO Module main screen**

- 1 You can assign new and existing users to a group. Do one of the following sub steps:
  - a To assign a new user to a group, see Part 1 of Procedure 1, "Creating a new user" on page 23.
  - b To assign an existing user to a group, go to the explorer menu and click on the icon of a user, then change that user's group affiliation by clicking the *Select* button adjacent to the *Group* field in the *Data > User data* view.

**Figure 19 Assigning a user to a group**

*All members of this group will be listed in the User section. The icon representing the user also appears in the explorer menu in their assigned group folder*

- 2 To edit the members of a group, highlight a user and click the *Edit* button.  
*The system opens the Data view for the user you have selected. There you can edit the user profile and change the group affiliation.*
- 3 You have completed this procedure.

## 2.4 Creating an alias

Each user has only one main identity—either as an individual user or as a member of a group. Users whose main identity is already assigned to another group use "aliases" (that is, another name), to join one or several additional groups. An "alias" is a copy of an individual user's main identity. This copy can be assigned to the group and is indivisibly linked to the main identity of the user.

### Procedure 4 Creating an alias

#### *In the User Management PRO Module main screen*

- 1 Click on *User > New > Alias*.  
The *Data* view appears (see *Figure 20*)

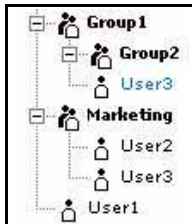
**Figure 20 The Alias view Data area**

- 2 To allocate an "alias" to an existing user, use the *Select* button adjacent to the *User* field to browse the user list and to find the user's main identity.

- 3 Create an alias for the user by assigning him or her to another group. To do so, click the *Select* button adjacent to the *Group membership* to find the group that will include the new "alias".
- 4 You can use the checkboxes in the *Permissions and workspaces* area to assign to the "alias" the permissions, documents, and the templates of the parent group.
- 5 Click Save.

*"Aliases" are displayed in blue in the explorer menu as seen in Figure 21.*

**Figure 21 Alias in the explorer menu**



*"Aliases" are displayed in square brackets in the User member summary for the groups in the Data view (see Figure 22)*

**Figure 22 Alias in a the group**

- 6 You have completed this procedure.



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## 3 User Management PRO Module tags and functions

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The following we:tags have been expanded to include a new attribute, *user*, for the User Management PRO Module:

- `<we:flashmovie>`
- `<we:href>`
- `<we:img>`
- `<we:input>` (all types)
- `<we:textarea>`

All these functions can be controlled directly using the User Management PRO Module. If you set the user attribute in these tags, you will be able to limit the function of that particular the we:tag to the users and groups specified in the user attribute. These attributes will remain in effect no matter what global permissions are assigned to individual users and groups in the *Permissions* area in User Management PRO Module. For example:

```
<we:textarea name="Text" cols="60" rows="30" dhtmledit="on"
showMenus="on" autobr="on" user="writer"/>
```

This example shows how you can limit the access to a single user, in this case the text area called *Text* can only be edited by the user called *writer*.

For further information about the advanced uses and syntax for the *user* attribute, consult the *webEdition Tag Reference Manual* at <http://www.living-e.de>





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## 4 Task/Messaging: Introduction

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This introduction is intended to help you familiarize yourself with the webEdition Task/Messaging Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Task/Messaging Module. These topics are treated in the following sections:

- Section 4.1, "What is the webEdition Task/Messaging Module?" on page 33
- Section 4.2, "Installation" on page 34
- Section 4.3, "General information and navigation" on page 34

### 4.1 What is the webEdition Task/Messaging Module?

webEdition offers not only the means of creating Web site content, but it also offers a working context in which you can administer the activities of your Web development team.

The webEdition Task/Messaging Module is a customized E-mail system in which you can send messages and administer tasks relating to Web page creation and administration.

All messages and tasks related to the development of your Web page content can be "contained" within this dedicated system. All tasks performed by users in webEdition can be administered and communicated without an external E-mail system or process. Your communiqués pertaining to development tasks are thus separated from your larger enterprise E-mail systems, making your process easier to monitor and administer.

Typically, the editor-in-chief (or person in charge of your Web page administration), uses this module to communicate work items to Web content developers. Developers, in turn, can use the tool to communicate among themselves, and to report on the status of defined tasks.

There are two types of communiqués that you can create using the Task/Messaging Module:

- Message communiqué.

A webEdition message is similar to a simple E-mail message. You can send messages to any user registered in the User Management Module of webEdition.

You can also send E-mail messages to external recipients. In this case, you employ the normal E-mail address syntax (for example, `username@web_address.com`).

- Task communiqué

A task communiqué instructs a webEdition user to conduct a specified task within webEdition. There are two ways to create a task communiqué in webEdition:

- Manual task creation. You can create a task manually that you can send to other users.
- Automatic task creation. If you install the webEdition Workflow Module, tasks can be generated automatically as soon as documents or objects are inserted in the workflow. Once a workflow has been defined, all functions of the workflow are administered automatically by the system. For more information on the Workflow Module, consult *The Workflow Module User Guide* which is available on our documentation page the following URL:  
<http://www.living-e.de>

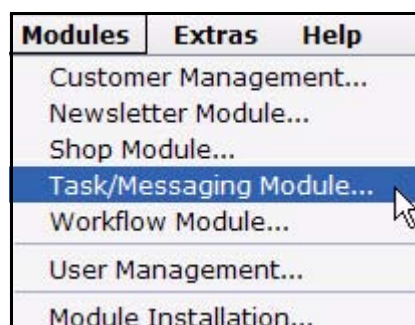
## 4.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.living-e.de>

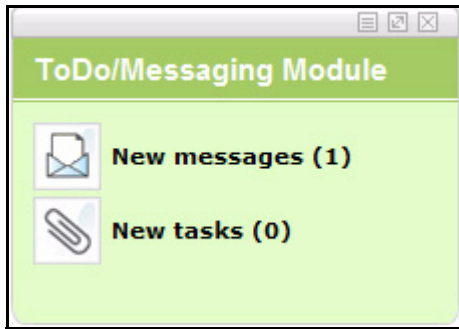
## 4.3 General information and navigation

After you have installed the Task/Messaging Module, you will find a new menu item in the main menu called *Modules*, which contains all the modules in your installation of webEdition. *Task/Messaging* will appear as an option in the *Modules* drop-down menu (see Figure 23).

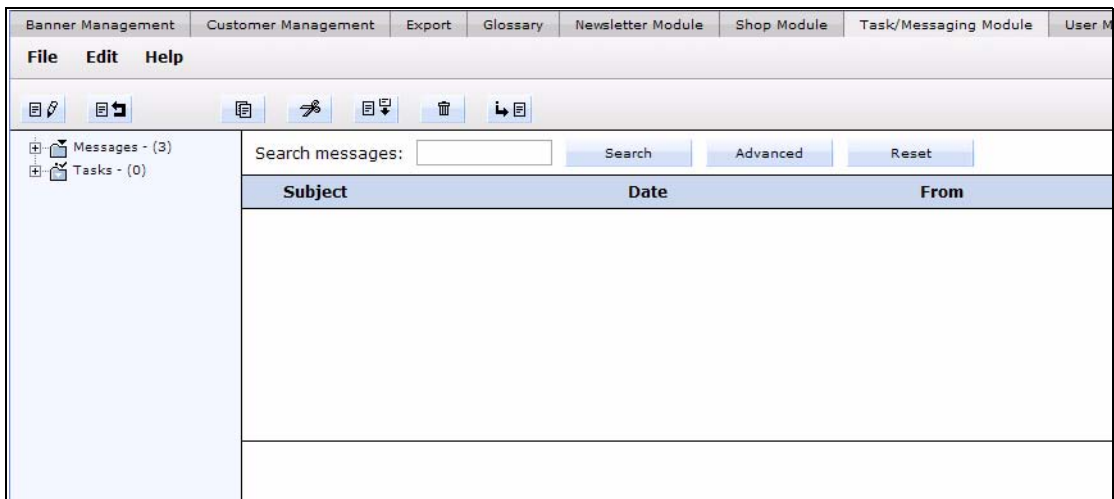
**Figure 23 Modules drop-down menu**



To open the module, you can click on *Task/Messaging* in the *Modules* menu, or you can go directly to create a new task or message by clicking on one of the icons that appears in the webEdition *Cockpit* menu (see Figure 24).

**Figure 24 webEdition cockpit**

Click on *Task/Messaging* in the Modules menu. The Task/Messaging Module main screen appears (see Figure 25).

**Figure 25 Task/Messaging Module main screen**

#### 4.3.1 Navigation: toggling between the tasks and messaging systems

The Task/Messaging Module is divided in two parts: tasks and messaging. There is one main screen for each system.

You can toggle between the main messaging screen and the main task screen by clicking on the "launch" button in the upper right corner of each screens.

When you are in the main task screen, a button in the form of an envelope icon appears in the upper right corner of the main task screen. If you click on this button, your view will switch to the main messaging screen (see Figure 26).

**Figure 26 "Launch Messaging System" button**

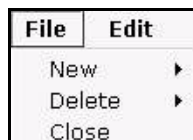
Conversely, when you are in the main messaging screen, a button in the form of a check mark icon appears in the upper right corner of the main messaging screen. If you click on this button, your view will switch to the main task screen (see Figure 27).

**Figure 27 "Launch Task System" button**

### 4.3.2 The Task/Messaging *File* menu

The *File* drop-down menu has the following items (see Figure 28, "Task/Messaging File menu" on page 36).

- *New*. You can select from the following sub-items:
  - *New > Message*. Use this command to create a new message.
  - *New > Task*. Use this command to create a new task.
  - *New > Folder*. Use this command to create a new folder.
- *Delete*. Select *Delete > Folder* to delete a folder.
- *Close*. This command closes the application

**Figure 28 Task/Messaging *File* menu**

### 4.3.3 The Task/Messaging *Edit* menu

The *Edit* drop-down menu has the following items (see Figure 29, "Task/Messaging Edit menu" on page 36):

- *Folder*. Use this item to edit or change the folder settings.
- *Settings*. Use this item to instruct the system to search for new messages on the server at defined time intervals.
- *Copy*, *Cut*, *Paste*. Use these commands to copy, cut and paste an item.

**Figure 29 Task/Messaging *Edit* menu**

### 4.3.4 Changing folder settings

By clicking *Edit > Folder*, the module opens a screen allowing you to change the parameters of the folder (see Figure 30).

**Figure 30** *Change folder settings* screen

 A dialog box titled "Change folder settings" with a light purple background. It contains three fields: "Folder name" with a text input box, "Parent folder" with a dropdown menu showing "Task", and "Type" with a dropdown menu showing "webEdition Message". At the bottom right are "Save" and "Cancel" buttons.

Using the *Change folder settings* screen, you can perform the following operations:

- change the name of the folder, using the *Folder name* field
- assign a file to a new directory, using the *Parent folder* select box
- change the type of communiqué (either message or task) using the *Type* select box

#### 4.3.5 Changing the update interval

By clicking *Edit > Settings*, the module opens a screen allowing you to change the parameters governing the automatic update interval. With this feature, by making a selection from the *Check step* select box, you can instruct the system to search for new messages on the server at defined time intervals (see Figure 31).

**Figure 31** *Settings: update interval* screen

 A dialog box titled "Settings - Mozilla" with a standard window border. Inside, there's a sub-dialog titled "Settings" with a light purple background. It contains a "Check step" field with a dropdown menu showing "10" and the text "Minute(s)". At the bottom are "Save" and "Cancel" buttons.

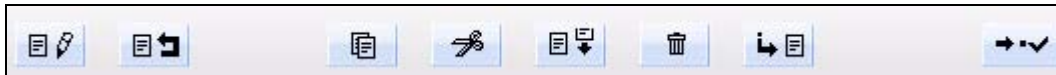
## 4.4 Function buttons

The webEdition Task/Messaging Module provides graphical buttons that you can use to perform actions. Both types of communiqués, that is, messages and tasks, have distinctive buttons.

**Note:** For further information on toggling between the messaging and tasks modules, see Section 4.3.1, "Navigation: toggling between the tasks and messaging systems" on page 35.

#### 4.4.1 Messages buttons

Go to the messaging main screen. When the message function is active, the following buttons appear (see Figure 32).

**Figure 32 Messaging buttons**

The following sub-sections describe each of the messaging buttons.

#### **4.4.1.1 The *Create message* button**

Click the button shown in Figure 33, to create a message.

**Figure 33 Create message button**

#### **4.4.1.2 The *Reply to message* button**

After opening a message, you can reply directly to the sender by clicking on the "reply to message" button (see Figure 34). The system automatically enters the address of the original sender into the to field of your reply message.

**Figure 34 Reply to message button**

#### **4.4.1.3 The *Copy message* button**

Select this button to copy a messages you have marked to another directory (see Figure 35).

**Figure 35 Copy message button**

#### **4.4.1.4 The *Cut message* button**

Select the button shown in Figure 36, to cut selected messages. Thereafter you can paste the message into another file.

**Figure 36 Cut message button**

#### **4.4.1.5 The *Paste message* button**

Use the button shown in Figure 37, to insert copied or cut messages into another file.

**Figure 37 Paste message button**

#### **4.4.1.6 The *Delete message* button**

Select the button shown in Figure 38, to delete all marked messages.

**Figure 38 Delete message button**

#### **4.4.1.7 The *Look for new messages* button**

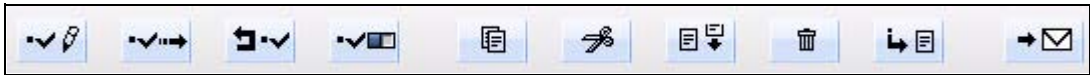
When you click on this button, the server will search for new messages (see Figure 39).

**Figure 39** *Look for new messages* button

#### 4.4.2 Task buttons

Like the messaging system, the task system has a group of buttons designed to help you perform basic functions within the Task/Messaging Module. Some of the task buttons have the same icon and function as those used in the messaging main screen. See Section 4.4.1.3, "The Copy message button" on page 38 through to Section 4.4.1.6, "The Delete message button" on page 38. The remaining task buttons are treated in the sub-sections that follow.

Activate the task main screen. Once the task function is active, the following task buttons appear (see Figure 40):

**Figure 40** Task buttons

##### 4.4.2.1 The *Create task* button

Click the button shown in Figure 41, to create a new task.

**Figure 41** *Create task* button

##### 4.4.2.2 The *Forward task* button

Click the button shown in Figure 42, to forward a task to another individual on your Web development team.

**Figure 42** *Forward task* button

##### 4.4.2.3 The *Reject task* button

Click the button shown in Figure 43, to reject a task that has been sent to you. The task communiqué will be returned to the sender.

**Figure 43** *Reject task* button

##### 4.4.2.4 The Task *Update status* button

Select this button to check whether or not the status of a task has changed (see Figure 44).

**Figure 44** Task *Update status* button

## 4.5 The explorer menu

The explorer menu appears on the left side of the Task/Messaging main screen. The explorer menu offers a visual representation of the directories (folders) and files contained in the Task/Messaging Module (see Figure 45).

**Figure 45 Task/Messaging explorer menu**



To open a folder, click the plus "+" sign on the left side of the folder. The folder symbol changes to "open", and the contents of the directory appears. Below the open folder are the files saved in the directory. Underneath the directory task, you find the sub directories.

## 4.6 The edit views of the Task/Messaging Module

There are three areas in the messaging and task edit views (see Figure 46, "The edit screen (messaging module)" on page 40).

- The upper area allows you to search for messages
- The middle area provides a list of your messages or tasks
- The lower area shows the content of a marked message or task

**Figure 46 The edit screen (messaging module)**





#### 4.6.1 Edit view: Search tasks/messages area

To search for a specific task or message, type a word in the search field, then click the *Search* button. The system searches the current directory for the word you have typed in the search field (see Figure 47).

**Figure 47 Searching for a task/message**

Search messages:	Search	Advanced	Reset
report			
Subject	Date	From	Read
<input type="checkbox"/> Status report: Marketing	2004-02-05 - 18:32	User2	

By clicking the *Advanced* button, you can extend the search area to other directories, or you can limit your search to parts of a message (for example, the address of sender). See Figure 48, "Advanced search options" on page 41. To search multiple fields, hold down the Shift or Control key on your keyboard while you select each item, then click on *OK*. You can delete the search parameters by selecting the *cancel* button.

**Figure 48 Advanced search options**

Advanced search settings - Mozilla

Search following fields: Subject, Sender, Content

Search following folders: Messages, Sent, Task, Done, Rejected

OK Cancel

You can reset the both the simple and the advanced search by clicking the *Reset* button.

#### 4.6.2 Edit view: task/messages lists area

The middle area of the edit view displays a list of all the messages and tasks of the open directory. There are minor differences in the messages list and tasks list screens.

##### 4.6.2.1 Messaging edit view: messages list area

The messages list area offers the following information about each message file (see Figure 46, "The edit screen (messaging module)" on page 40):

- *Subject*. This column describes the topic of the message.
- "Checkbox". To the left of the message title is a checkbox that you can use to select (or "mark") a message. When you activate the checkbox, you mark the message. The marked message appears in blue coloured font.
- *Date*. This column shows the day and time that the message was composed.
- *From*. This column indicates the sender of the message.
- Read (or not). A blue oval appears beside messages that have not been read. Once read, the button changes from blue to grey.

#### 4.6.2.2 Task edit view: task list area

The middle part of the task edit view displays a list of all the tasks of the open directory. The list offers the following information about each task file (see Figure 49, "Task list" on page 42):

- *Subject*. This item describes the subject of the task.
- "Checkbox". To the left of the task subject is a check box that you can use to select (or "mark") a task. When you activate the check box, you mark the task. The marked message appears in blue coloured font in your directory tree.
- *Deadline*. This column indicates the date and time by which the task is to be completed.
- *Priority*. This column indicates the importance of the task on a scale of 1 (highest) to 10 (lowest).
- *Status*. This column indicates the progress of the completion of the task.

**Figure 49 Task list**

Subject	Deadline	Priority	Status
<input type="checkbox"/> Please review	2004-02-06 - 17:00	1	0%
<input type="checkbox"/> Please complete 3.0 Marketing materials	2004-02-06 - 23:59	1	0%
<input checked="" type="checkbox"/> Release 3.0 information	2004-02-08 - 23:59	1	0%

<b>Task</b>	
Subject	Release 3.0 information
Deadline	2004-02-08 - 23:59
Status	0% <input type="text" value="100%"/>
Created by	webEdition (dan)
Assigned by	webEdition (dan)
Date of creation	2004-02-05 - 15:26
Please update the corporate Web site with the information about the features in Release 3.0.	

#### 4.6.2.3 Viewing the contents of marked messages

The lower part of the edit section displays the contents of a message or a task. To view the contents of a message or a task, you must first mark the message by selecting the corresponding checkbox in the message/task list (see Figure 49, "Task list" on page 42).

## 5 Using the Task/Messaging Module

This chapter describes how to use the Task/Messaging Module. This section treats the following procedures, some of which are common for both tasks and messages:

- Section 5.1, "Creating, reading and replying to a message" on page 43
- Section 5.2, "Creating, reading, forwarding, and rejecting tasks" on page 45
- Section 5.3, "Common procedures" on page 50

### 5.1 Creating, reading and replying to a message

The procedures in this section treat how to use the basic features of the Messaging system to create, read, and reply to messages.

#### 5.1.1 Creating a new message

Use the following procedure to create a new message.

##### Procedure 5 Creating a new message

##### *In the Messaging main screen*

- 1 Click the *File > New > Message*, or click the *create message* icon.  
A screen opens in which you can create your message (see Figure 50).

**Figure 50** Create message screen

The screenshot shows a 'Create message' dialog box. It has a title bar with the text 'Create message'. Inside the dialog, there are three labeled fields: 'From:' with the value 'admin (Administrator )', 'Recipients:' with the value 'John Doe', and 'Subject:' with the value 'Testserver'. Below these fields is a large text area containing the text 'Had you had the time to evaluate the new webEdition?'. At the bottom right of the dialog are two buttons: 'OK' and 'Cancel'.

- 2 In the *Recipients* field, enter the E-mail address of the person to whom you wish to send the message. Enter the address by doing one of the following steps:
  - a Type an E-mail address directly in the field

- b Choose a receiver from your address book. For further information on how to use the address book, see Section 5.3, "Common procedures" on page 50.
- 3 Type the subject of your message in the *Subject* field.
- 4 Type your message in the contents text box below the *Subject* field.
- 5 Select OK to send your message.  
*The system opens an information window telling you whether or not your message was successfully sent.*
- 6 Click the OK button to close the window.  
*The message will appear in the Sent folder of the explorer menu.*
- 7 You have completed this procedure.

### 5.1.2 Reading a message




Use the following procedure to read the contents of a message. To learn how message notification operates in webEdition, see Section 5.3.1, "Task and message notification" on page 50.

#### Procedure 6 Reading a message

##### *In the Messaging main screen*

- 1 If you have not already done so, open the Messaging main screen.  
*All messages in the directory appear on the screen in the edit view. Each message is described under the headings of Subject, Date, From, and Read.*
  - 2 Click on the message to display the contents of the communiqué.  
*The contents of the message appears in the bottom half of your edit view.*
- Note:** When a message had been read, the oval in the Read column turns from blue to grey colour.

**Figure 51 Reading a message**

Subject	Date	From	Read
<input checked="" type="checkbox"/> <u>Re: webEdition 5 ist da!</u>	2007-06-01 - 14:20	<u>John Doe</u>	
<input type="checkbox"/> <u>Bla</u>	2007-06-13 - 09:48	<u>admin</u>	
<input type="checkbox"/> <u>Need a new account</u>	2007-06-13 - 09:50	<u>John Doe</u>	
<b>Message</b> <b>Subject</b> Re: webEdition 5 ist da! <b>From</b> John Doe (John Doe) <b>Date</b> 2007-06-01 - 14:20  Sie schrieben: > Schon die neue Version ausprobiert? Das rockt! > Schöner Gruß  Hey, admin - du hast völlig recht! Das DIng ist gekauft!			

- 3 You have completed this procedure.

### 5.1.3 Replying to a message

Use the following procedure to reply to a message.

#### Procedure 7 Replying to a message

##### *In the Messaging main screen*

- 1 If you have not already done so, open the message main screen. Mark the message to which you wish to reply by clicking in the checkbox to the left of the *Subject* field.
- 2 Click on the reply button.

*A new window appears. The original sender appears automatically as the receiver and his/her original message appears at the top of the text box (see Figure 52).*

**Figure 52 Replying to a message**

- 3 Write your reply message in the text box.
- 4 To send your reply, click the *OK* button.  
*The system opens a confirmation screen telling you that the message was successfully sent.*
- 5 Click *OK* to close the confirmation screen.
- 6 You have completed this procedure.

## 5.2 Creating, reading, forwarding, and rejecting tasks

The procedures in this section describe how to use the basic features of the Task/Module to create, read, forward, and reject tasks. To learn how task notification operates in webEdition, see Section 5.3.1, "Task and message notification" on page 50

### 5.2.1 Creating a new task

Use the following procedure to create a new task.

#### Procedure 8 Creating a new task

##### *In the Task main screen*

- 1 Click on the *Create task* button.  
*The New Task screen opens (see Figure 53).*

**Figure 53 Creating a new task**

- 2 Choose a recipient. Enter the address by doing the following:
  - a Type an E-mail address directly in the field.
  - b Choose a receiver from your address book. For further information on how to use the address book, see Section 5.3, "Common procedures" on page 50.
- 3 Type the subject of your task in the *Subject* field.
- 4 Use the *Deadline* pick lists to define the deadline for the completion of the task. To do so, complete the following sub-steps:
  - a Enter the date (day/month/year) in the first three fields.
  - b Enter the time (hour/minute) in the following two fields.
- 5 From the *Priority* select box, choose a priority status, where the priority defines the importance of each task. Choose one (1) to designate the highest priority, ten (10) to designate the lowest priority.
- 6 Write the details about the task you wish to assign in the text field below the *Priority* select box.
- 7 To send your task, click the *OK* button on the bottom of the form. (You can also choose to cancel the action by clicking the *Cancel* button.)  
*The system opens a confirmation screen telling you that the task was successfully created.*
- 8 Click the *OK* button to close the screen.
- 9 You have completed this procedure.

### 5.2.2 Reading a task message

Use the following procedure to read the contents of a task.

#### Procedure 9 Reading a task message

##### *In the task main screen*

- 1 If you have not already done so, open the Task main screen.  
*All messages or tasks in the directory appear on the screen in the edit view (see Figure 61, "Task waiting!" on page 51).*
- 2 Click on the task to display the contents of the communiqué.  
*The description of the task appears in the bottom half of your edit view.*

**Figure 54 Reading a task message from the task list**

Subject	Deadline	Priority	Status
<input checked="" type="checkbox"/> Please complete 3.0 Marketing materials	2004-02-06 - 23:59	1	0%

**Task**

Subject: Please complete 3.0 Marketing materials  
Deadline: 2004-02-06 - 23:59  
Status: 0%   
Created by: webEdition (dan)  
Assigned by: webEdition (dan)  
Date of creation: 2004-02-05 - 15:38

---

Please complete the final copy of the 3.0 marketing materials intended for publication on our corporate Web site, and return them to me for review by the indicated deadline. User1 will post the material on 8 February.

3 You have completed this procedure.

### 5.2.3 Rejecting a task

Use the following procedure to reject a task.

#### Procedure 10 Rejecting a task

##### *In the tasks list*

- 1 Mark the task using the checkbox adjacent to the subject of the task message (see Figure 54, "Reading a task message from the task list" on page 47).
- 2 Select the *Reject task* button.  
*A new window opens (see Figure 55).*

**Figure 55 Rejecting a task**

**Reject task**

From: webEdition (dan)  
Rejected to: webEdition (dan)  
Subject: Please complete 3.0 Marketing materials

I shall be at the Partner Day giving a marketing presentation on Friday, so I have already prepared the material. User 1 can access the data to be published from the Marketing Department folder on our publications server.

- 3 Select the receiver.
- 4 Type your message in the text box.

5 To send the rejection message, click the **OK** button.

6 You have completed this procedure.

*The system sends the task back to the originator, who will see a task appear in the Rejected folder in the explorer menu.*

**Figure 56 Rejected task notification**

<div> <div>Messages - (0)</div> <div>Tasks - (0)</div> <div>Done - (0)</div> <div>Rejected - (1)</div> </div>	Search tasks: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Advanced"/> <input type="button" value="Reset"/>			
	Subject	Deadline	Priority	Status
	<input type="checkbox"/> Please complete 3.0 Marketing materials	2004-02-06 - 23:59	1	0%

### 5.2.4 Forwarding a task

Use the following procedure to forward a task.

#### Procedure 11 Forwarding a task

##### *In the Task main screen*

1 If you have not already done so, open the Task main screen.

*All messages or tasks in the directory appear on the screen in the edit view (see Figure 61, "Task waiting!" on page 51).*

2 Click on the task to display the contents of the communiqué.

*The description of the task appears in the bottom half of your edit view.*

3 Mark the task, using the checkbox adjacent to the subject of the task message (see Figure 54, "Reading a task message from the task list" on page 47).

4 Select the *forward task* button.

*A new window opens (see Figure 57).*

**Figure 57 Forwarding a task**

Forward task

Assigner: dan (webEdition )  
Recipient:   
Subject:   
Deadline:     
   
Priority:

Please complete the final copy of the 3.0 marketing materials intended for publication on our corporate Web site, and return them to me for review by the indicated deadline. User1 will post the material on 8 February.  
--- User2 -- 2004-02-05 - 16:39 -- Rejected to dan  
I shall be at the Partner Day giving a marketing presentation on Friday, so I have already prepared the material. User 1 can access the data to be published from the Marketing Department folder on our publications server.  

I am forwarding this task notice that was returned to me from User2. Please see her comments above. The marketing materials are ready, and I have reviewed them. Please access them from the server and publish them by the indicated deadline.

5 Select the receiver from the recipients list.

6 Enter the content of your message in the text box.

7 Click the **OK** button to forward the task.

*The system opens a confirmation screen telling you that the task was successfully forwarded.*



- 8 Click *OK* to close the confirmation screen.
- 9 You have completed this procedure.

### 5.2.5 Updating a task

#### Procedure 12 Reading a task message

##### *In the task main screen*

- 1 If you have not already done so, open the Task main screen.  
*All messages or tasks in the directory appear on the screen in the edit view (see Figure 54, "Reading a task message from the task list" on page 47).*
- 2 Click on the task to display the contents of the communiqué.  
*The description of the task appears in the bottom half of your edit view.*
- 3 You can send an update report in two ways. If you wish to include comments in your report, or if you are partially finished
  - a If you have finished the task, you can click the 100% button in the lower register of the edit screen, then go to Step 7.
  - b If you wish to include comments in your report, or if you are partially finished go to Step 4.
- 4 Click the *Status update* icon, then  
*The Task status update screen appears (see Figure 58).*

**Figure 58 Task status update screen**

Task status update	
Assigner	webEdition (dan)
Subject	Please complete 3.0 Marketing materials
Deadline	<div>06 02 2004</div> <div>23 59</div>
Status	80 %
Priority	1
<p>Please complete the final copy of the 3.0 marketing materials intended for publication on our corporate Web site, and return them to me for review by the indicated deadline. User1 will post the material on 8 February.</p> <p>--- User2 -- 2004-02-05 - 16:39 -- Rejected to dan I shall be at the Partner Day giving a marketing presentation on Friday, so I have already prepared the material. User 1 can access the data to be published from the Marketing Department folder on our publications server.</p> <p>--- dan -- 2004-02-05 - 17:04 -- Forwarded to User1 I am forwarding this task notice that was returned to me from User2. Please see her comments above. The marketing materials are ready, and I have reviewed them. Please access them from the server and publish them by the indicated deadline.</p>	
Comment	<div>There are only a few items yet to process.</div> <div>All will be complete by the requested date.</div>

- 5 In the status field, enter a value representing the percentage of the task that is completed. You can also enter comments in the *Comments* box, if necessary.
- 6 Click *OK*.
- 7 You have completed this procedure. The assigner of the task will automatically be notified of the status update.

## 5.3 Common procedures

Common procedures are those which you can use in both the task and the messaging portions of the Task/Messaging Module.

The following topics and procedures are treated in this section:

- Section 5.3.1, "Task and message notification" on page 50
- Section 5.3.2, "Using the address book feature" on page 51
- Section 5.3.3, "Creating or changing a folder or directory" on page 53
- Section 5.3.4, "Copying, cutting and inserting selected tasks or messages" on page 54
- Section 5.3.5, "Deleting a message or task" on page 54

### 5.3.1 Task and message notification

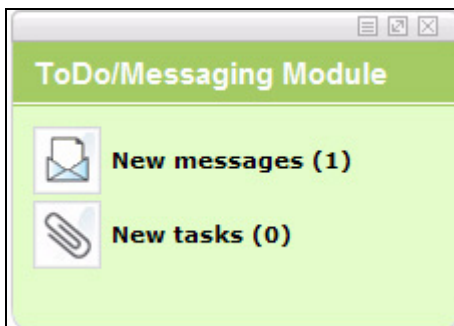
When you have been assigned a task, webEdition automatically notifies you. Use the following procedure to access tasks (and messages) that have been assigned to you.

#### Procedure 13 Task notification

##### *In the webEdition main screen*

- 1 When you log in to the webEdition main screen, there are two indicators:
  - a The webEdition *Cockpit* screen displays the number of new tasks and messages that await you (see Figure 59).

**Figure 59 Cockpit task notification**



- b In the upper right corner of the webEdition main screen, there is a message and a task icon. The number adjacent to the icon indicates the number of items that await your response.

**Figure 60 Task and message notification icons**



- 2 Click on either of the task icons to launch the *Task* system. (Likewise, if you have received a message indicator, click on the message icon).

*The system opens the task view showing you your assigned tasks (see Figure 61).*

**Figure 61 Task waiting!**

<div><div><div><div></div><div>Messages - (4)</div></div><div><div></div><div>Tasks - (1)</div></div><div><div></div><div>Done - (0)</div></div><div><div></div><div>Rejected - (0)</div></div></div></div>	Search tasks: <input type="text"/> <div>Search</div> <div>Advanced</div> <div>Reset</div>										
	<table><tr><th>Subject</th><th>Deadline</th><th>Priority</th><th>Status</th></tr><tr><td><input type="checkbox"/> <u>Evaluate web</u>Edition 5</td><td>2007-06-20 - 12:00</td><td>2</td><td>0%</td></tr></table>				Subject	Deadline	Priority	Status	<input type="checkbox"/> <u>Evaluate web</u> Edition 5	2007-06-20 - 12:00	2
Subject	Deadline	Priority	Status								
<input type="checkbox"/> <u>Evaluate web</u> Edition 5	2007-06-20 - 12:00	2	0%								

- 3 You have completed this procedure.

*After accessing the Task system, the numeric task or message indicators described in this procedure in Step 1 on page 50, are reset to zero (0).*

### 5.3.2 Using the address book feature

The address book feature relies on the user data entered into webEdition with the User Management Module. Hence all of your internal registered webEdition users will already have their profile entered into the system and you can access this data to build your personal address book. The following steps describe how to use the address book feature to add webEdition users to your address book and to select users from the address book

#### 5.3.2.1 Adding an internal user to your address book

##### Procedure 14 Adding an internal user to your address book

###### *In the Messaging main screen*

- 1 Open the *Create message* screen by clicking *File > New > Message*.
- 2 Click on the word *Recipients*.

*The Select recipients screen opens (see Figure 62).*

**Figure 62 Select recipients screen**

- 3 Click the *Select user* button on the bottom of the *Select recipients* screen.

*The Select user screen appears, offering a list of all of your webEdition registered users (see Figure 63).*

**Figure 63 Select user screen**

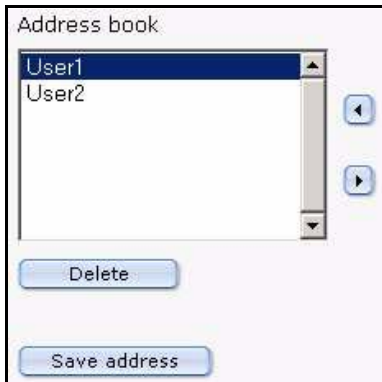
- 4 Using the checkbox beside each name, select the user(s) that you wish to add to your address book.
- 5 Click the OK button.

*This action moves the data of the newly selected addresses to the Selected box on the Select recipients screen.*

**Figure 64 Selected users box**

- 6 To move the new name(s) to the address book, highlight the name, then click on the left arrow.

*The name appears in the Address book box.*

**Figure 65 New users in the address book**

- 7 Save the address book by clicking the Save address button.  
*The system opens a confirmation window telling you that the address book has been saved.*
- 8 Close the confirmation window by clicking OK.  
*The new address is saved in your address book.*
- 9 You have completed this procedure.

### 5.3.2.2 Choosing a recipient from the address book

#### Procedure 15 Choosing a recipient from the address book

##### *In the Messaging main screen*

- 1 Open the Create message screen by clicking File > New > Message.

- 2 Click on the word *Recipients*.

*The Select recipients screen opens (see Figure 62, "Select recipients screen" on page 51), in the Address book box is a list of users in your address book (see Figure 65, "New users in the address book" on page 52)*

- 3 Select a recipient (or recipients) from your address book by highlighting the names from the Address book list.
- 4 Click the right arrow between the Address book and Selected box.  
*The recipients appear in the Selected box on the right side of the screen.*
- 5 Click the OK button.

*The Select recipients screen closes and the user appears in the Recipients field of the Create message screen. Thereafter, you can complete and send your message.*

- 6 You have completed this procedure.

### 5.3.3 Creating or changing a folder or directory

Use the following procedure to create a new folder or directory.

#### Procedure 16 Creating or changing a folder or directory

##### *In the Task or Messaging main screen*

- 1 Go to the File drop-down menu and click *New > Folder*.  
*The New folder view appears (see Figure 66).*

**Figure 66** *New folder view*



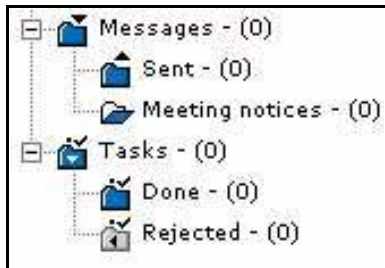
The screenshot shows a 'New folder' dialog box. It has a title bar that says 'New folder'. Inside, there are three labeled fields: 'Folder name' with a text input containing 'Meeting notices', 'Parent folder' with a dropdown menu currently showing 'Messages', and 'Type' with a dropdown menu currently showing 'webEdition Message'. At the bottom of the dialog are two buttons: 'Save' and 'Cancel'.

- 2 In the *Folder name* field, type the name of your new folder.
- 3 Using the *Parent folder* select box, choose the directory in which the folder is to be saved.

**Note:** To select a top-level directory, choose *None* from the list.

- 4 Choose the type of communiqué: *webEdition Message* or *Task*.
- 5 Click the Save button.

*The system confirms the action. Click OK. The new folder appears in the explorer menu (see Figure 67).*

**Figure 67 New message folder in explorer menu**

6 You have completed this procedure.

### 5.3.4 Copying, cutting and inserting selected tasks or messages

Use the following procedure to copy or cut, and insert selected files.

**Note:** To select multiple files, you must make sure that the "multiple selection" button at the top of the page is activated. (The select multiple files feature is activated when the arrow on the icon appears in black.)

#### Procedure 17 Copying, cutting, and inserting files

##### *In the task or messaging edit view*

- 1 Mark the task or message by activating the corresponding checkbox in the task or messaging file list.
- 2 Select the *Copy* or the *Cut* button.
- 3 In the file navigator window on the left side of the screen, highlight the directory into which you wish to move your file.
- 4 Select the *Paste* button to insert your file into the directory. The file appears in the new directory.
- 5 You have completed this procedure.

### 5.3.5 Deleting a message or task

Use the following procedure to delete selected files.

#### Procedure 18 Deleting a message or task

##### *In the task or messaging edit view*

- 1 Mark the files for deletion by activating the corresponding checkbox in the task or messaging file list.
- 2 Click the "trash can" icon.  
*A dialogue box opens asking you to confirm that you wish to delete the task or message.*
- 3 Select *ok* to confirm the deletion, or *cancel* to terminate the process.  
*If you select ok, the selected files are deleted and will no longer appear in the file menu.*
- 4 You have completed this procedure.

---

## 6 Workflow Module: Introduction

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This introduction is intended to help you familiarize yourself with the webEdition Workflow Module. This chapter treats what the module does and how to install it. You can also find information here about the basic layout and command features for the Workflow Module. These topics are treated in the following sections:

- Section 6.1, "What is the webEdition Workflow Module?" on page 55
- Section 6.2, "Installation" on page 55
- Section 6.3, "General information and navigation" on page 56

### ATTENTION

The Workflow Module is part of the User Management PRO Module. You must install the PRO version of the User Management Module in order to use the Workflow Module.

### 6.1 What is the webEdition Workflow Module?

The webEdition Workflow Module allows you to create processes and to track all the steps required by you and your colleagues in the development of your web content.

Using the Workflow Module you can easily create sophisticated processes that streamline the administration of your content management operations.

You can automatically create authorization levels among the users within your organization, and assign to them their respective tasks. All tracking and notification functions are handled by the Workflow Module, removing the need for manual reporting using traditional methods such as E-mail, telephone or other tracking systems. The rights to create a workflow and to change documents in the workflow are controlled by the User Management Modules.

The Workflow Module complements the User Management PRO Module and the Task/Messaging Module.

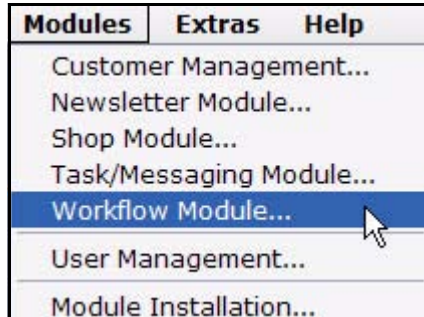
### 6.2 Installation

The installation procedure for all modules is described in *The webEdition Installation, Update and Backup Procedures*. A .pdf version of this guide is available at the following URL: <http://www.living-e.de>

## 6.3 General information and navigation

Once you have installed the Workflow Module, *Workflow* will appear as an option in the *Modules* drop-down menu (see Figure 68).

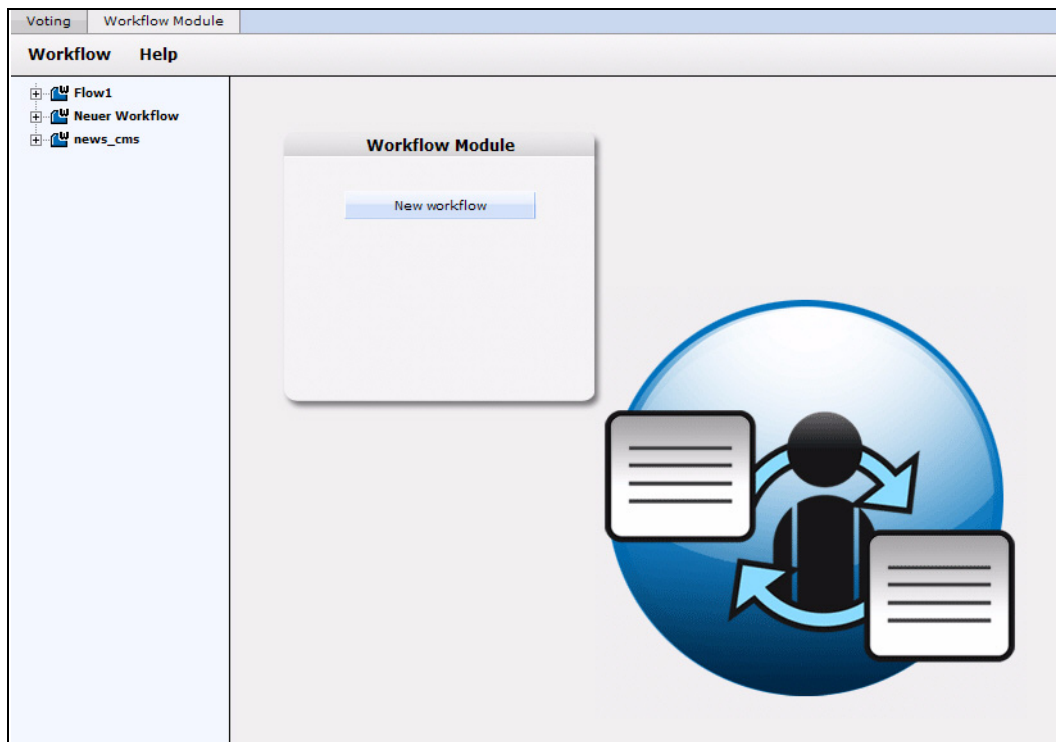
**Figure 68 Modules drop-down menu**



### 6.3.1 Opening the Workflow Module

From the *Modules* drop-down menu, click on *Workflow*. The main Workflow Module page opens showing the *Quickstart* screen (see Figure 69):

**Figure 69 Workflow Module: Quickstart screen**



Using the *Quickstart* screen, you have the option of going directly to a new workflow.

### 6.3.2 Workflow Module drop-down menu

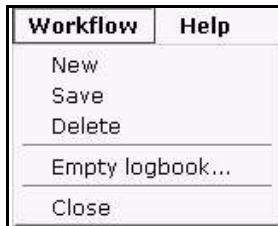
The following items appear under the *Workflow* menu (see Figure 70, "The Workflow menu" on page 57):

- *New*. Use this command to create a new workflow process.
- *Save*. Select this command to save the workflow.



- *Delete*. Select this command to delete the workflow.
- *Empty logbook*. Use this command to modify what is saved in your workflow log files. Each document or object has a separate log. The quantity of data can become very large over time. With the *Empty logbook* function you can administer the contents of the log. For example, you can delete items that are older than a defined date. For further information about logbooks, see Section 8.8.2, "Using the logbook" on page 75.
- *Close*. Use this command to exit the Workflow Module.

**Figure 70 The Workflow menu**



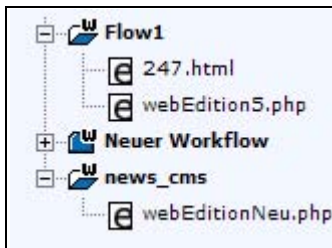
### 6.3.3 The Workflow Module explorer menu

The Workflow Module is a stand-alone and independent element within the webEdition environment. Using the Workflow Module you define processes through which other elements in webEdition, such as documents, must pass.

The content of these documents and objects is not affected by the process of the workflow. Therefore, different documents and objects can be assigned to different workflows. You can create unlimited workflows. (In theory you can have as many workflows as documented objects, but ideally you define workflows and assign them to specified directories which are assigned to each workflow.)

Individual workflows are stored in webEdition and they appear in the explorer menu. A small "w" (signifying a "workflow") appears in the upper right corner of the directory (see Figure 71).

**Figure 71 The explorer menu showing workflow items**



If you click the plus "+" sign, all active documents in the workflow appear. Active documents are those which are not complete, and which have not yet been published.

If there are no documents or objects in a specific workflow, the workflow directory will appear empty.

### 6.3.4 The document *Information* view

The *Information* view allows you to check the status of your document. You can access the information about a document by going to the explorer menu, and clicking on the name of the document that you wish to examine. The system opens the *Information* page (see Figure 72).

**Figure 72** The *Information* view

webEdition page: /we\_demo/news/2007/webEditionNeu.php

Properties Edit **Information** Preview Scheduler PRO Validation

**ID**  
275

**Type**  
webEdition document

**File size**  
8.32 KB (8521 Byte)

**Created**  
2007-06-01 - 15:18

**Created by**  
Administrator (admin)

**Changed**  
2007-06-13 - 10:32

**Changed by:**  
Administrator (admin)

**Last published**  
-

**Local path**  
-

**HTTP path**  
-

**Workflow**

Step	User1	Worktime (H)	Time elapsed	Time remaining	End date
1	Bildredakteur	15	0:0:1	14:59:59	2007-06-14 - 01:32
2	John Doe	15			

Logbook

Decline Forward Save Publish

The *Information* page records the following data:

- file type and size
- creation, modification and publication dates
- the *Local path* (file location on the local computer), and *HTTP path* (www location)
- workflow matrix (For more details about the workflow matrix, see Chapter 7, "Workflow design theory" on page 61.

### 6.3.5 The edit view of the Workflow Module

There are two views in the Workflow Module: *Properties* and *Overview*, each of which is accessed by its respective tab.

### 6.3.5.1 Properties view

Using the *Properties* view, you can name your workflow, and assign directories and document types as well as categories and objects to it (see Figure 73).

**Figure 73 The *Properties* view**

### 6.3.5.2 Overview view

*Overview.* In the *Overview* view, you can define the form of the workflow as a matrix and the properties of each step in the workflow (see Figure 74).

**Figure 74 The *Overview* view**

The Overview area has four columns:

- The *Step* column shows the number of the respective serial step in the workflow.
- *AND / OR* signifies the Boolean operator and is used to define the relationship to adjacent parallel steps. Once you have more than one user assigned to a step, that is once you have parallel step, you must choose if the step is to adhere to AND logic (all named users must authorize the release of a document) or the "OR" logic (only one of the users needs to authorize the release).

- *Worktime (H)* is the time (in hours) allotted for the completion of the task.
- *User* describes the user who has been assigned a task.

## 7 Workflow design theory

The following chapter describe briefly the theoretical principles behind the workflow process under the following sub sections:

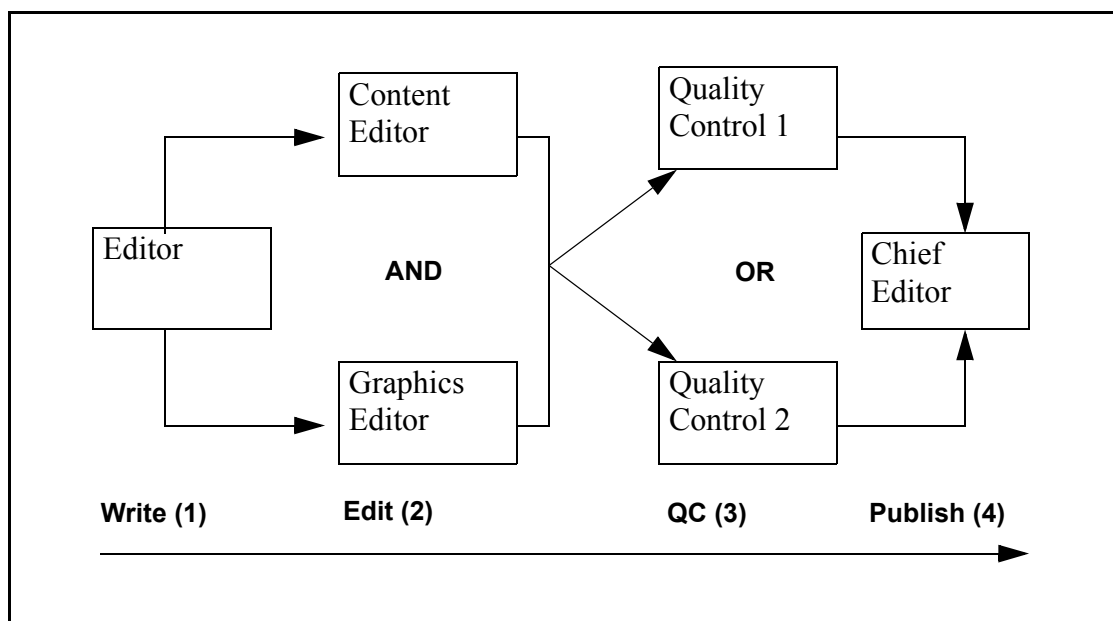
- Section 7.1, "What are serial and parallel steps?" on page 61
- Section 7.2, "Workflow design: a matrix" on page 62
- Section 7.3, "What kinds of documents can be assigned to a workflow?" on page 62
- Section 7.4, "Who can create a workflow?" on page 63

### 7.1 What are serial and parallel steps?

Your business may require processes which are complex, and which include serial steps, or a combination of serial and parallel steps. Serial steps occur in succession; parallel steps occur concurrently. See, for example, Figure 75, "Hypothetical workflow" on page 61.

Parallels steps have to be connected using Boolean Logic. Either you connect the two parallel steps with AND logic, in which case both people have to authorize the document before it is transferred to the next step. Or you may use OR logic, in which case only one of the two member needs to approve the document.

**Figure 75 Hypothetical workflow**



In the example in Figure 75, "Hypothetical workflow" on page 61:

1. The editor puts an article into the workflow.
2. The text goes to the content editor and the graphics editor. Because **AND** is used, both editors have to release the document before it can move to the next step.
3. In this step only one of the quality controllers needs to authorize the content (because **OR** logic has been selected).
4. The final decision is by the chief editor. The chief editor knows that the preceding steps have been accomplished according to the defined process. The chief editor has the right to publish the document.

### 7.1.1 User management

You can use the Workflow Module to define whether or not a person in the process has the permission to change a document. If the person to whom an item is sent does not have the permission to execute the request, the document is returned to the workflow for reassignment.

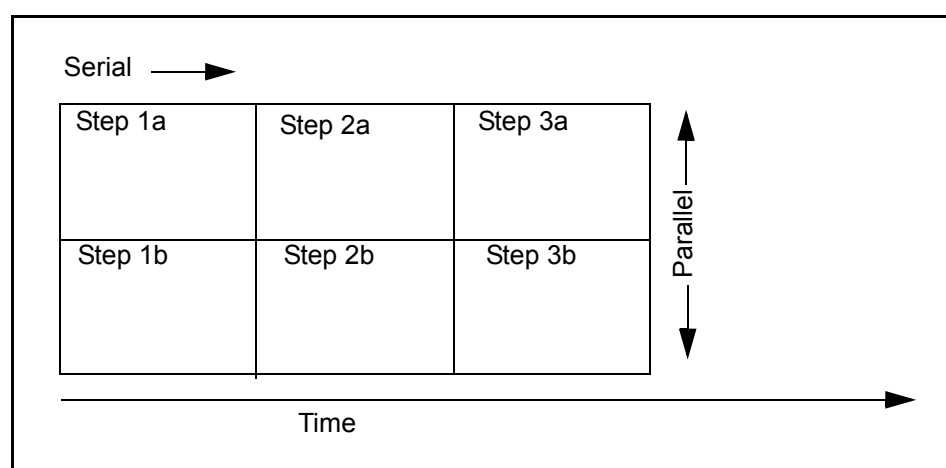
The Workflow module also allows you to generate an automatic E-mail to the person who has to review and release a work item.

## 7.2 Workflow design: a matrix

The workflow is designed like an  $n$  by  $m$  matrix.

In theory you can define  $n$  different steps in serial (along a horizontal axis, parallel to the time  $x$ ) and  $m$  different steps in a parallel direction (along a vertical axis, perpendicular to the time  $x$ ). You can extend the workflow in both directions: parallel and serial. For example, see Figure 76.

**Figure 76** An example of a 3X2 matrix



## 7.3 What kinds of documents can be assigned to a workflow?

Two types of webEdition documents can be assigned to a workflow:

- documents (webEdition pages, HTML pages)
- objects from the Database Object Module.

Documents can be assigned to one of two workflow types:

- Directory-oriented workflow. The workflow that a document needs to run through is defined by the directory where the document is saved.
- Document type or a category. In this case the workflow applies to all documents of a given document type or category.

Objects-based workflows are always tied to an object class.

## 7.4 Who can create a workflow?

As noted in the introduction, the Workflow Module requires the User Management or the User Management PRO Module. Depending on the version of the User Management Module that you have installed, there are different options available to you with respect to who can create a workflow.

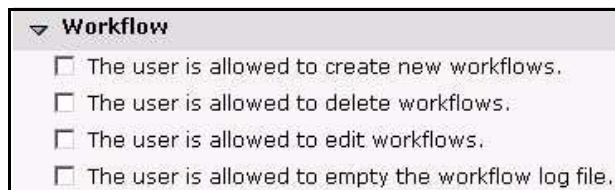
### 7.4.1 User Management Module (Standard version)

In the standard version only the administrator is allowed to create and change the workflow.

### 7.4.2 User Management PRO Module

User Management PRO Module allows you to assign to any user the right to create, change or delete a workflow (see Figure 77).

**Figure 77 Permissions to define a workflow**



For further information about the User Management Module and the User Management PRO Module, see the respective webEdition User Guides at the following URL:  
<http://www.living-e.de>

### 7.4.3 Who has the right to publish?

The following users have the right to publish:

- users that have the right to publish according to the User Management Module

**Note:** If a user has the right to publish according to the User Management Module, that person can publish at any time, thus finishing the workflow.

- users that are last in the workflow

**Note:** The user at the last step of the workflow can publish even if this right has not been defined in the User Management Module.

Your ability to govern the publication rights of users varies depending on version of the User Management Module that you have purchased.

The (standard) User Management Module offers the controls shown in Figure 78. You must determine on an individual basis, whether or not you wish to give a user the right to publish. You do so by clicking on the *User is allowed to publish* check box.

**Figure 78 Publication permissions in the User Management Module**

The User Management PRO Module offers a suite of control features in addition to the *User is allowed to publish* check box (see Figure 79).

**Figure 79 Publication permissions in the User Management PRO Module**

In the chapter that follows, we shall see how to create and manage a workflow.



---

## 8 Creating a workflow

---

This chapter describes the procedures for creating a workflow and working on documents in a workflow.

The rights to create a workflow and to publish a document are controlled by the User Management Modules. Some of the procedures described in this chapter, particularly those associated with creating a workflow, can only be completed if the a user has been assigned the appropriate permissions. For information on permissions, see Section 7.4, "Who can create a workflow?" on page 63.

The following procedures appear in this chapter:

- Section 8.1, "Creating a new workflow" on page 65
- Section 8.2, "Defining the steps of the workflow" on page 67
- Section 8.3, "Setting the worktime variables" on page 68
- Section 8.4, "Selecting the users in a workflow" on page 68
- Section 8.5, "Using the in Workflow option" on page 70
- Section 8.6, "Using E-mail messages within the workflow" on page 71
- Section 8.7, "Using the Task/Messaging Module with the Workflow Module" on page 71
- Section 8.8, "Examining the status of a document and using the logbook" on page 74
- Section 8.9, "Using the "Worktime exceeded" feature" on page 76

### 8.1 Creating a new workflow

Use the following procedure to create a new workflow.

#### **Procedure 19 Creating a new workflow**

***At the Workflow drop-down menu in the Workflow Module main screen***

- 1 Click *Workflow > New*.

*The system opens the Properties view as seen in Figure 80.*

**Figure 80 Creating a new workflow: the *Properties* view**

- 2 In the *Name* field of the *Properties* view, type the name you wish to give to your new workflow.
- 3 In the area under the *Name* field, define which documents or objects need to pass through the workflow prior to publication. There are three options: *Directory-based*, *Document type/Category-based*, or *Object-based*.
  - a If you wish to create a directory-based workflow, do the following sub-steps:
    - i Click on the button beside the words *Directory-based*.
    - ii Click on the *add* button in the file manager, and choose the document(s) that must pass through the workflow.  
*All documents in this directory need to pass through the workflow in order to be published.*

**Note:** You can also use this area to edit a workflow at a later date. To delete a directory, click on the "trash can" icon. To delete all items, click on the delete all button.
  - b If you wish to create a document-type/category-based workflow do the following sub-steps:
    - i Click on the button beside the words *Document type/Category-based*.
    - ii Choose a document type from the drop-down menu.
    - iii Click the *add* button under the *Categories* dialog box to access the category manager. The Category manager area opens and you can choose a category.  

**Note:** You can also use this area to edit a workflow at a later date. To delete a category, click on the trash bin. To delete all items, click on the *delete all* button.
  - c If you wish to create an object-based workflow, do the following substeps:
    - i Click on the button beside the words *Object-based*.

- ii Select which objects need to run through your workflow by clicking the *add* button. The *Object class manager* window opens and you can choose the object class.
- iii Click the *add* button under the *Categories* dialog box to access the category manager. The *Category manager* window opens and you can choose the category.

**Note:** You can also use this screen to edit a workflow at a later date. To delete an object class, click on the trash bin. To delete all items, click on the *delete all* button.

- 4 You have completed this procedure.

## 8.2 Defining the steps of the workflow

The following procedure describes how to define the steps for a new workflow.

### Procedure 20 Defining the steps for a new workflow

#### *In the Workflow Module Overview view*

- 1 If you are not already in the *Overview* view, go to the *Overview* view, by clicking on the *Overview* tab (see Figure 81).

**Figure 81 The Overview view**

Step	AND / OR	Worktime (H)	User1
1		10	User1

☐ Next step    ☐ Send mail    ☐ Edit   

- 2 Use the *Overview* view to define your workflow as an  $n \times m$  matrix, and to define all functions of the workflow. Add steps to your workflow by doing the following:
  - a To extend the workflow by serial steps, click the plus "+" icon at the bottom left. The workflow is now extended by one serial step (see Figure 82).

**Figure 82 Adding a serial step to a workflow**

Step	AND / OR	Worktime (H)	User1
1		10	User1
2		10	User1

☐ Next step    ☐ Send mail    ☐ Edit   

- b To extend the workflow in a parallel step, click on the plus "+" icon on the upper right corner (see Figure 83).

**Figure 83 Adding a parallel step to a workflow**

The screenshot shows a software interface titled "Workflow: New workflow" with tabs for "Properties" and "Overview". The "Overview" tab is active, displaying a workflow table with two steps. Each step has a "Step" number, an "AND / OR" connector, a "Worktime (H)" input field, and two columns for users: "User1" and "User2". Each user column contains a "Select" button and checkboxes for "Next step", "Send mail", and "Edit".

Step	AND / OR	Worktime (H)	User1	User2
1	AND	10	<input type="text"/> Select <input type="checkbox"/> Next step <input type="checkbox"/> Send mail <input type="checkbox"/> Edit	<input type="text"/> Select <input type="checkbox"/> Next step <input type="checkbox"/> Send mail <input type="checkbox"/> Edit
2	AND	10	<input type="text"/> Select <input type="checkbox"/> Next step <input type="checkbox"/> Send mail <input type="checkbox"/> Edit	<input type="text"/> Select <input type="checkbox"/> Next step <input type="checkbox"/> Send mail <input type="checkbox"/> Edit

3 You have completed this procedure.

### 8.3 Setting the worktime variables

After defining the steps in the workflow, you must assign a value to each step to indicate the time of its expected completion.

#### Procedure 21 Setting the worktime for a step

##### *In the Workflow Module Overview view*

- 1 In the *Overview* view (see Figure 81, "The Overview view" on page 67), enter a value in hours in the *Worktime (H)* box. This value represents the maximum duration that the document can remain in this step.  
For example, if you enter 24, the document remains for 24 hours in this position of the workflow.
- 2 If you wish the task to move to the next step (regardless of its completion), after the expiry of the allotted worktime, select the next step check box. If the option has not been activated the document will be returned to the sender.
- 3 You have completed this procedure.

### 8.4 Selecting the users in a workflow

Use the following procedure to select the users that are to be associated with each step in a workflow.

#### **ATTENTION**

Only users registered in the webEdition User Management Module can release documents.

#### **ATTENTION: User Restrictions**

If a user attempts to open a workflow document, and that user is not part of the workflow, he/she will be denied access to the document. A user that is not related to a workflow can view a document, but that user cannot change the document.

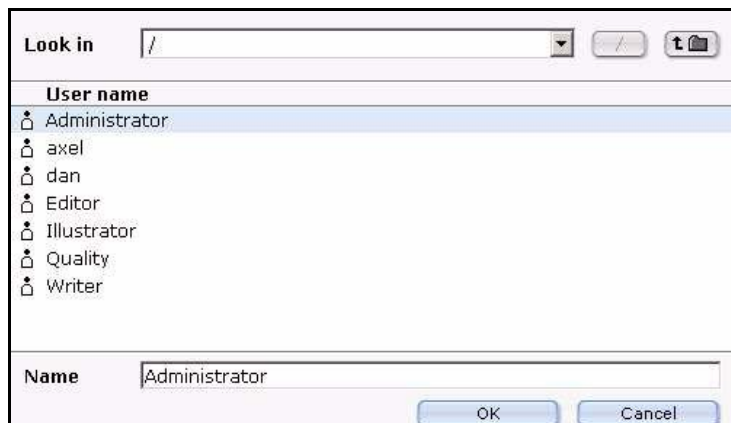
**CAUTION****Risk of lock out**

The user who creates a document is not part of the workflow. After he/she has put the document into the workflow he/she cannot make any changes to the document. If, however, that user has the right to publish, he/she can publish the document immediately.

**Procedure 22 Selecting the users in a workflow*****In the Workflow Module Overview view***

- 1 In the *Overview* view (see Figure 81, "The Overview view" on page 67), click the *Select* button to choose a user.

*The user manager area appears (see Figure 84).*

**Figure 84 User manager area**

- 2 Choose a user by clicking on the appropriate name from the list of users.

**Note:** If you do not want to add a user in a parallel step, leave the respective field empty. You must always choose a serial user.

- 3 Click the *OK* button.

*The designated user appears in the workflow.*

- 4 Choose additional users (if required) by clicking on the plus symbol at the top right side of the frame, and associate the users with their designated step in the workflow (see Figure 85).

**Figure 85 Users in a workflow**

Step	AND / OR	Worktime (H)	User1	User2
1	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Administrator <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	 <input type="checkbox"/> Send mail <input type="checkbox"/> Edit
2	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Writer <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	/Illustrator <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit
3	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Editor <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	 <input type="checkbox"/> Send mail <input type="checkbox"/> Edit
4	<input type="radio"/> AND <input checked="" type="radio"/> OR	10 <input type="checkbox"/> Next step	/Quality <input checked="" type="checkbox"/> Send mail <input checked="" type="checkbox"/> Edit	 <input type="checkbox"/> Send mail <input type="checkbox"/> Edit

- 5 Select the *edit* check box to give a user the ability to make changes in the document or object associated with the workflow. If the *edit* check box is not activated, the user cannot change the document.
- 6 Select the *send mail* check box, if you want respective users to receive an E-mail as soon as a new document enters workflow or if the user has been sent a task.

The E-mail is always sent to the person who is next in the release process. The system takes the E-mail address from the User Management or User Management PRO Module.

#### ATTENTION

The right to publish is always controlled by the User Management or User Management PRO modules. The last user(s) in the process hierarchy automatically has the permission to publish even if that right has not been defined in the User Management Module. In addition, if a user of a previously defined level of the workflow has a right to publish, he/she can publish the document in advance if the document object lies in his/her user space.

- 7 Save the workflow using the Save button on the lower left corner of the workflow screen (see Figure 86).

**Figure 86 Saving and activating a workflow**

- 8 Activate the workflow by selecting the Workflow is active check box (see Figure 86, "Saving and activating a workflow" on page 70).

If the workflow is not activated, the workflow is still saved, but it is not yet active for the related documents and objects. You can still publish these related documents and objects without the workflow. An inactive workflow appears in red.

Once the option workflow is active, all related documents can only be published after they run through the workflow. An active workflow appears in black in the workflow explorer menu. Only the user of the last workflow step can release a document for publishing.

- 9 You have completed this procedure.

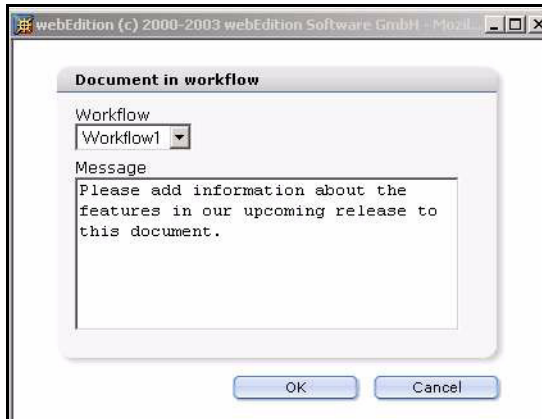
## 8.5 Using the *in Workflow* option

After creating the steps in a workflow and assigning users to it, you need to assign a document to the workflow. You use the *in Workflow* button, which appears at the bottom of the webEdition main screen (see Procedure 23).

**Procedure 23 Using the in Workflow option*****In the Documents view of the webEdition main screen***

- 1 Click on the *in Workflow* button to place the document or object into a workflow.

*The Document in workflow screen appears as seen in Figure 87.*

**Figure 87 The Document in workflow screen**

- 2 Select the workflow from the *Workflow* drop-down menu.
- 3 In the *Message* field, include a short message to the person who is next in the workflow.  
*The person to whom you have sent the message will see your message in his/her task list.*
- 4 Confirm by clicking *OK*.  
If you do not confirm with *OK*, the object does not go into the workflow. Once you have put the document into the workflow, the document appears in red in the explorer menu.
- 5 You have completed this procedure.

**8.6 Using E-mail messages within the workflow**

Communication is important when using a workflow. People must be informed of their role in the workflow. There are two ways to communicate with your colleagues. You can use the following methods:

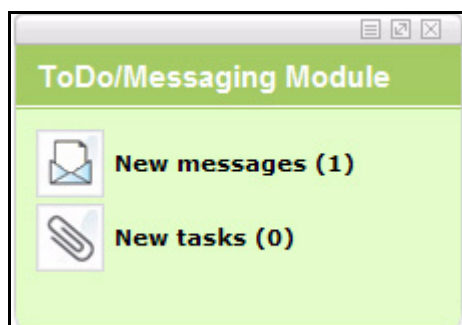
- an external E-mail system
- webEdition messaging

As discussed in Section 8.4, "Selecting the users in a workflow" on page 68, all the people who have assignments in the workflow (including those who must check, forward, or release documents) have been designated to their tasks. You can define whether or not a user receives an E-mail describing their task (see Figure 85, "Users in a workflow" on page 70). Once you place a document into the workflow, the system generates a standard E-mail message form, which includes a text box in which you write your message. The system also enters the E-mail address (as it is recorded in the User Management Module) of the next person in the workflow to whom the message is to be sent.

**8.7 Using the Task/Messaging Module with the Workflow Module**

The webEdition Workflow Module requires the Task/Messaging Module to work. The Task/Messaging Module helps you to send messages to the user who has been assigned to work on a document or object in the next step of a workflow.

Once installed, the Task/Messaging Module produces two icons in the top right frame of the webEdition screen. The same icons are visible on the webEdition *Cockpit* (see Figure 88, "Task/Messaging icons" on page 72):



**Figure 88 Task/Messaging icons**

- the envelope icon signifying a message
- the check mark icon signifying a task

If you click one of the icons, the Task/Messaging Module opens.

The tasks and messages of the Task/Messaging Module are used like a private E-mail box. The tasks and messages are intended for, and accessible to, a specific user, who has been registered in the User Management Module.

For a detailed description of the Task/Messaging Module and how to use it, see the *The Task/Messaging Module User Guide* at the following URL: <http://www.living-e.de>

Using the Task file of the Task/Messaging Module, you can define all the tasks associated with a specific user. When a document is entered by an editor into the workflow, it appears in the task list of the next person in the workflow.

#### **Procedure 24 How to process a task in the workflow**

##### ***In the webEdition main screen***

- 1 Once you log into the system you will see the number of unfinished tasks next to the task icon on the top right of your screen, or in the *Quickstart* screen as seen in Figure 88, "Task/Messaging icons" on page 72.

Click on the task icon.

*The system automatically opens the Task/Messaging Module, and task window appears with a list of your open tasks (see Figure 89).*

**Figure 89 Task notification**

Search tasks: <input type="text"/> <input type="button" value="Search"/> <input type="button" value="Advanced"/> <input type="button" value="Reset"/>			
Subject	Deadline	Pri	
<input type="checkbox"/>	2007-06-10 - 09:00	1	
<input type="checkbox"/> Workflow task	2007-06-13 - 20:42	5	
<input type="checkbox"/> wE 5 installieren	2007-07-01 - 12:00	1	

- 2 Click the workflow task that appears in your list.

*A description of the task and a notice alert appears in the lower part of the window. A link to the document or object that needs to be worked on is automatically generated as seen in Figure 90.*



**Figure 90 Details about a task**

<b>Task</b>	
<b>Subject</b>	<b>Workflow task</b>
<b>Deadline</b>	2007-06-13 - 20:42
<b>Status</b>	0% <input type="button" value="100%"/>
<b>Created by</b>	John Doe (John Doe)
<b>Assigned by</b>	John Doe (John Doe)
<b>Date of creation</b>	2007-06-13 - 10:42

There is a document waiting for you in the workflow.  
go for it

**Document:** [/we\\_demo/news/2007/273.php](/we_demo/news/2007/273.php)

- 3 In the bottom frame of the page, click the *Document* link.

*The document (or object) opens for editing. At the bottom of the page are three option (see Figure 91).*

**Figure 91 Declining, forwarding or saving a task**

<input type="button" value="Decline"/>	<input type="button" value="Forward"/>	<input type="button" value="Save"/>	<input type="button" value="Publish"/>
--	--	-------------------------------------	--

- 4 As a recipient of a task, you have one of three choices. Do one of the following sub steps:
- Work on the task. You can work on the task in the open edit window and save your changes by selecting the Save button. (Thereafter you can forward the task, see Step c).
  - Decline the task and send the task back to the originator.
    - Select *Decline*.

*The Decline document dialogue box opens (see Figure 92).*

**Figure 92 Decline document dialogue box**

**Decline document**

Message

I am unable to complete the assigned task. Please forward it to another writer/editor.

- Enter an explanation about why you are rejecting the task.
- Click OK, then go to Step 5.

*When a task is declined, the system activates the task notification icon on the originator's screen. When the originator opens the task, he/she sees your message, as shown in Figure 93.*

**Figure 93 Notification of a declined task**

Subject	Deadline	Priority	Status
<input type="checkbox"/> Workflow task	2004-02-11 - 12:51	5	0%
<input checked="" type="checkbox"/> The document has been returned from the workflow.	2004-02-11 - 17:43	5	0%
<input type="checkbox"/> Workflow task	2004-02-12 - 02:52	5	0%

Subject	<b>The document has been returned from the workflow.</b>
Deadline	2004-02-11 - 17:43
Status	0% <input type="button" value="100%"/>
Created by	webEdition (dan)
Assigned by	webEdition (dan)
Date of creation	2004-02-11 - 16:43

---

**The document has been returned from the workflow.**

I am unable to complete the assigned task. Please forward it to another writer/editor.

**Document:** [/we\\_demo/news/news\\_webEdition\\_version3.php](/we_demo/news/news_webEdition_version3.php)

**c** Forward the task.

After you have completed the work assigned to you, save your page, then select *Forward* to send the task to the next user in the workflow.

*You receive an on-screen message from the system that the document has been passed on in the workflow. The next person in the workflow will receive a task notification.*

**5** You have completed this procedure.

**Note:** If you decline or forward the document or object, a value of 100% will appear in the *Status* column of the task notification screen and the task will be saved in the *Done* folder where all tasks are saved. Rejected tasks will be saved in the *Rejected* folder in the explorer menu.

## 8.8 Examining the status of a document and using the logbook

There are two ways to examine the status of a document within the Workflow Module. You can access data about the progress of a document in the workflow by

- checking the document *Information* view
- checking the log book

### 8.8.1 Using the *Information* view

The following procedure describes how to check the status of your document using the information view.

**Procedure 25 How to check the status of a document****In the Workflow Module**

- 1 Go to the explorer menu and click on the name of the document that you wish to examine.
- 2 Click the *Information* tab.

*The system opens the Information view (see Figure 94).*

**Figure 94 The Information view**

webEdition page: /we\_demo/news/2007/webEditionNeu.php

Properties Edit **Information** Preview Scheduler PRO Validation

**ID**  
275

**Type**  
webEdition document

**File size**  
8.32 KB (8521 Byte)

**Created**  
2007-06-01 - 15:18

**Created by**  
Administrator (admin)

**Changed**  
2007-06-13 - 10:32

**Changed by:**  
Administrator (admin)

**Last published**  
-

**Local path**  
-

**HTTP path**  
-

**Workflow**

Step	User1	Worktime (H)	Time elapsed	Time remaining	End date
1	Bildredakteur	15	0:0:1	14:59:59	2007-06-14 - 01:32
2	John Doe	15			

Logbook

Decline Forward Save Publish

- 3 Examine the matrix at the bottom of the *Information* view for the status of the document.  
*The matrix tells you about the steps, the user names of those involved in the workflow and the allotted worktime.*
- 4 You have completed this procedure. If you wish to see details and the comments entered by users about completed tasks, see Section 8.8.2, "Using the logbook" on page 75.

**8.8.2 Using the logbook**

The logbook is an archive of all workflow activities. It gives you information about all workflows so that you can always see who has done what and when. You can see the log report for each document by opening the *Information* view (as shown in Figure 94, "The Information view" on page 75) and selecting the *logbook* button at the bottom of the screen).

The logbook includes the following information in a tabular format (see Figure 95, "The logbook in the information view" on page 76):

- *Action*. This column describes what has happened to the document in the workflow.
- *Description*. This column provides a description of the task associated with the workflow step.
- *Time*. Time of the action in the workflow.
- *User*. The person who performed the activity.

**Figure 95 The logbook in the information view**

Action	Description	Time	User
Workflow is finished.		2004-02-11 - 17:35	- - (Quality)
User has forcibly approved document.		2004-02-11 - 17:35	- - (Quality)
User has approved document.	I have finished updating the webEdition logo for release 3. Please review and publish if it meets with your approval.	2004-02-11 - 17:32	- - (Illustrator)
Document has been inserted into workflow.	Please update the graphics to include our release 3 logo.	2004-02-11 - 17:22	webEdition - (dan)

## 8.9 Using the "Worktime exceeded" feature

The worktime exceeded feature informs users that they have exceeded the time allotted to an assigned task.

In order for the "Worktime exceeded" message feature to function, you must set up a PHP script on your server that will monitor the process of the tasks at regular intervals. You will find the script in the following directory: webEdition/we/include/we\_modules/workflow/weWorkflowCron.php.

If you are using a UNIX server, you set up this script using a cron job (to do so see Procedure 26, "Creating a cron job on a UNIX server" on page 77). If you are using a windows server, use the Task Scheduler (to do so see Procedure 27, "Creating a planned task using Windows" on page 77).

**Note:** Not all Internet service providers offer these services. Contact your provider for availability.

### ATTENTION

If you do not set up the cron job or scheduled task, the automatic message feature informing users of the exceeded worktime will not function.

### 8.9.1 Creating a chron job using UNIX

Prerequisites:

- The chron program must exist on the server
- you can run a PHP script via HTTP (that is, a text-based web browser or an HTTP downloader).

The chron program on a UNIX server can be lynx, wget, curl or a similar application. The chron job starts this program on a scheduled basis and gives it the URL of the PHP script. The program then starts the PHP script.

How to set up a chron job varies among Internet service providers. Many providers have a web interface. Contact your provider for further help, if necessary.

If your provider offers telnet or ssh or direct access via your terminal, you can set up the chron job by doing Procedure 26, "Creating a chron job on a UNIX server" on page 77.

#### Procedure 26 Creating a chron job on a UNIX server

**In a UNIX terminal window**

- 1 At the UNIX prompt, type

```
crontab -e
```

*This command opens the default editor of the server (normally a vi editor).*

- 2 Write the following string:

```
0,10,20,30,40,50 * * * * Program
http://www.YourDomain.de/webEdition/we/include/
we_modules/workflow/weWorkflowCron.php
```

In place of the variable, *Program*, type either lynx, curl or the name of the text-based browser or HTTP downloader you are using.

In the place of the variable, *www.YourDomain.de* variable enter your domain name.

**Note:** In this example, the 0...50 indicates that the chron job will run every 10 minutes.

- 3 Save.
- 4 You have completed this procedure.

### 8.9.2 Creating a planned task using the Windows Task Scheduler

With a windows server you need a program that runs a PHP script or HTTP. You can use Internet Explorer, or another external program, such as wget.

**Note:** We recommend wget for Windows. You can download it using the following link: <http://www.interlog.com/~tcharron/wgetwin.html>

#### Procedure 27 Creating a planned task using Windows

**On your Windows desktop**

- 1 Click on *Start > Settings > Control Panel*.
- 2 Click on *Scheduled Tasks*.  
*The task assistant opens.*
- 3 Click *continue*.

- 4 A dialog appears where you choose the program you wish to use.
- 5 Select your program of choice (such as `weget.exe`).
- 6 Set up the time interval for the scheduled task.
- 7 Enter your user name and password, then click the *Continue* button.
- 8 Activate the check box for extended properties.
- 9 Click *finish*.
- 10 Open the weget application.
- 11 In the weget application, insert the webEdition URL into the wget parameter settings.  
`http://www.YourDomain.de/webEdition/we/include/  
we_modules/workflow/weWorkflowCron.php`
- 12 Click on the *Time plan* tab.
- 13 Click on the *Extended* button, and define the following options:
  - a Activate the *Repeat interval* check box.
  - b Adjust the interval (for example, 10 minutes).
  - c Set the duration to 24 hours.
  - d Click *OK*.
- 14 Click on the *Adjustment* tab, and select the time after which the task must end (for example, 1 minute).
- 15 Click *OK*.

The task is now defined and set up. It will appear in the *Scheduled Task* window.

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# User Management PRO, Task/Messaging and Workflow Modules

## User Guide

Standard 5.0.1

June 2007

Printed in Germany

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