CGI DataCycle360 2024 Customer guide

General

27.12.2023 CGI DataCycle360 Services

PO Box 38 (Karvaamokuja 2), 00381 Helsinki

ABOUT CGI

Founded in 1976, CGI is a global IT and business process services provider delivering business consulting, systems integration and outsourcing services. With 72,000 professionals operating in 400 offices in 40 countries, CGI fosters local accountability for client success while bringing global delivery capabilities to clients' front doors. CGI applies a disciplined and creative approach to achieve an industry-leading track record of on-time, on-budget projects and to help clients leverage current investments while adopting new technology and business strategies. As a result of this approach, our average client satisfaction score for the past 10 years has measured consistently higher than 9 out of 10.

COPYRIGHT STATEMENT

Table of content

Confidential

Confidential

1 Overview

CGI DataCycle360 is a system for digital document management which is mainly used for the purposes of

- electronic archives,
- paper-free approval procedure of documents (purchase invoices, memo vouchers, contracts, employment suggestions etc.),
- processing purchase requests and
- reporting.

Features, functions and fields in the CGI DataCycle360 system are defined individually for each customer according to their wishes. For example, locks controlling the functions for making queries and adding and deleting information are defined separately for each user and each function. Therefore, the CGI DataCycle360 user interfaces may look very different between various users.

Manuals of CGI DataCycle360 system have been divided into separate documents by topic as follows:

CGI DataCycle360

CGI DATACYCLE360 MANUALS

- General (en, fi)
- Workflow (en, fi)
- Archive (en, fi)
- Admin (en, fi)
- Access control (en, fi)
- Workflow settings (en, fi)
- Scan (en, fi)
- Order matching (en, fi)
- Contract matching (en, fi)
- Invoicing (en, fi)

2 Logging in the system

2.1 Background

You can login to CGI DataCycle360 by using CGI DataCycle360's login window (CGI DataCycle360 login) or external authentication system/SSO. CGI DataCycle360 login is described below. External authentication and changing the password differ from this.

2.2 CGI DataCycle360 login

2.2.1 Signing in

You login to CGI DataCycle360 system by entering CGI DataCycle360 username and password. Username and password are usually sent to user by e-mail. When signing into CGI DataCycle360 the first time, CGI DataCycle360 forces user to change the password. (See Changing the password).

When the username and password have been entered in the fields in login widow, login is activated by Login – button.

2.2.2 Language

User can select the language to be used from the dropdown list in the login window. When already logged in the language can be changed in CGI DataCycle360 settings.

If the login window is wanted to be in the desired language, it should be included in URL. E.g.:

- language english: http://xxx.yy.zz.cc:8080/rondor8-gui?locale=en_GB

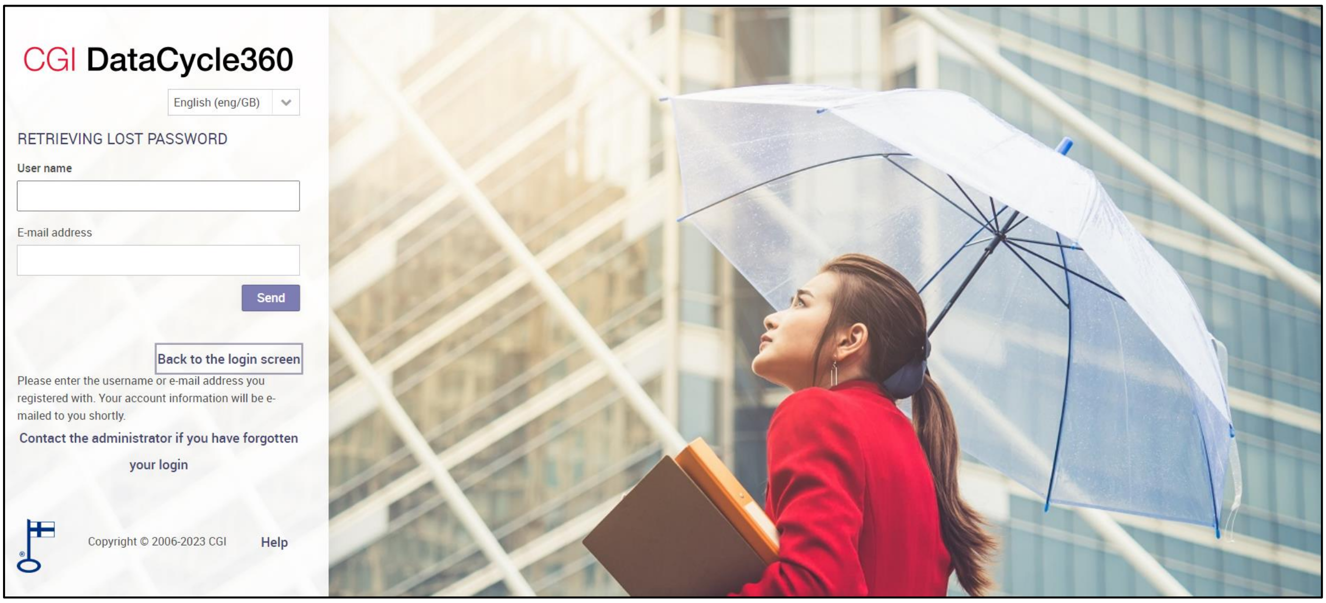
- language finnish: http:// xxx.yy.zz.cc:8080/rondor8-gui?locale=fi_FI

The link including the language selection can easily be saved in browser favourites by saving link after logout when first logged in with language selection.

2.2.3 Issues

2.2.3.1 Forgotten password

If the user has forgotten his/her password, the system will assign a new password to the user with the function **Have you forgotten your password?** When clicking the function, the system opens a new dialogue **Retrieving lost password**.



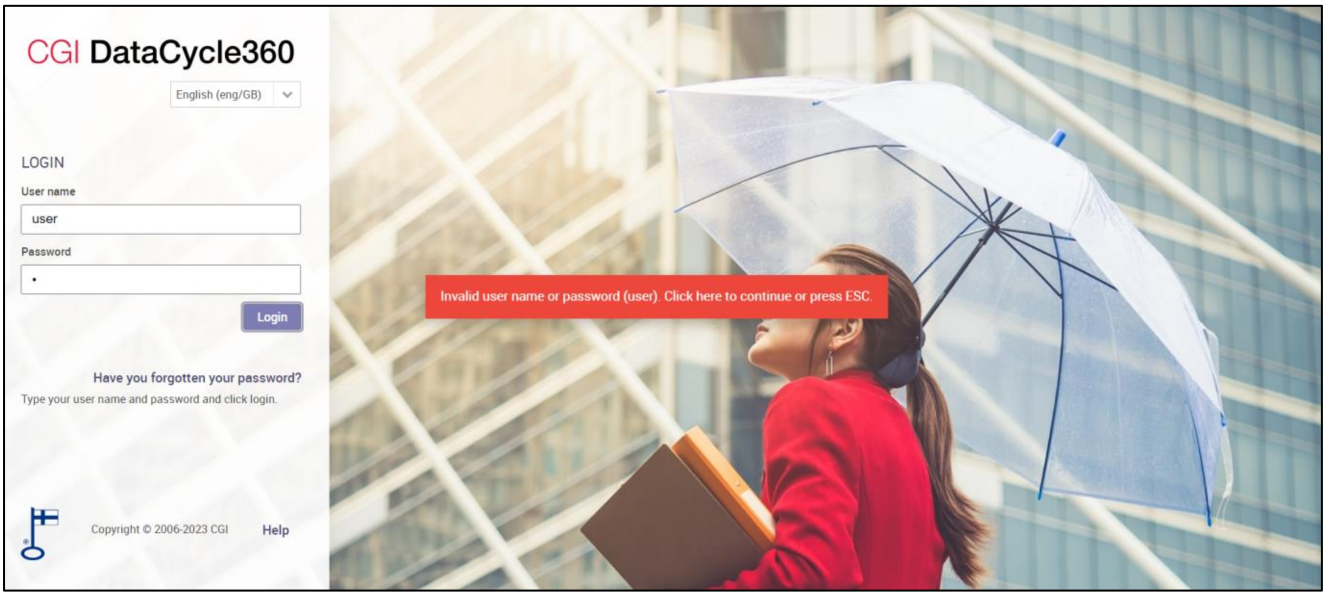
The user enters the **user name** or the **e-mail address** in the fields in the dialogue. The request is activated by clicking the **Send** button, and the system sends a new password to the user by e-mail providing that an e-mail address has been defined for the user.

If the user has forgotten both his/her user name and e-mail address, he/she must contact the system administrator.

The user is able to return to the login dialogue by clicking **Back to the login screen**.

The e-mail address has to be one saved in CGI DataCycle360 user information and the message about new password always goes there. The system will not send messages into separate private e-mail addresses.

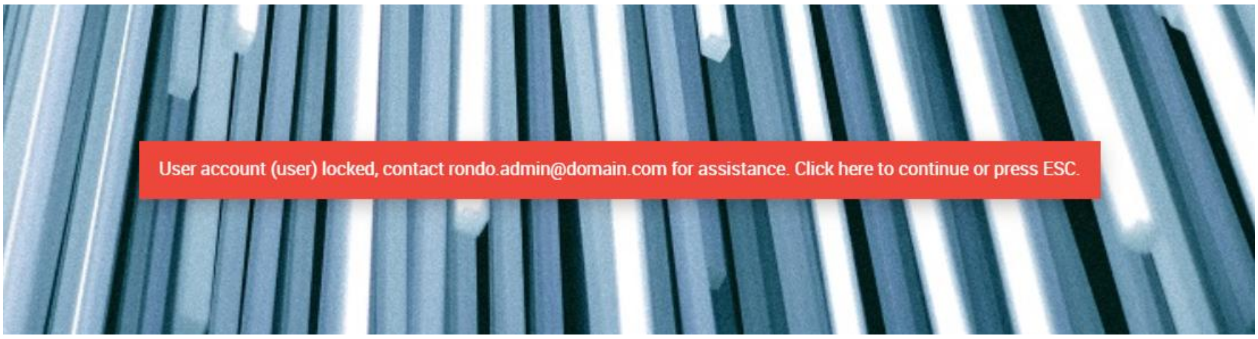
2.2.3.2 Invalid password



If the user tries to log in the system with an invalid user name or password, the system will display a notification (as in the dialogue above).

The user can try to login until the maximum number of attempts defined in the Admin/System/Instances section is exceeded. The super user must reset the locked password. (see Logged password).

2.2.3.3 Locked password



The locked password is to be reset by main user. Usually the maximum number of attempts is set to 5-8.

Until the password is reset the user will get the above message when attempting login.

2.2.3.4 No vacant licenses

2.3 Closing the system

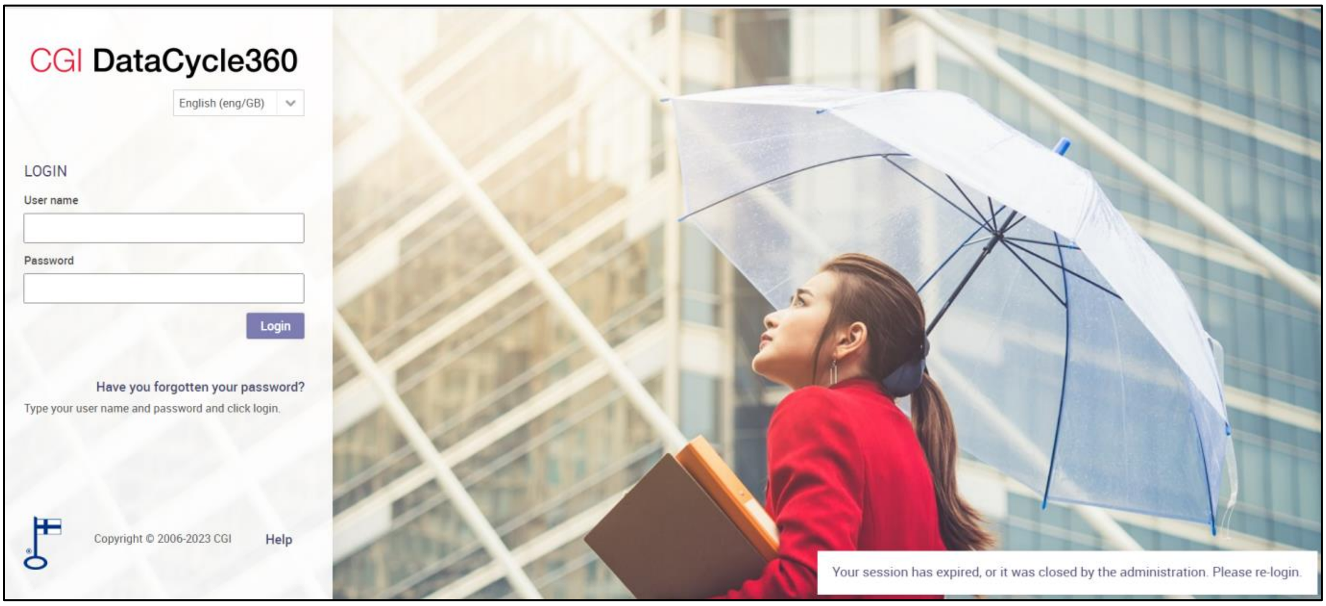
The user leaves the system with the **Log out** function available in the top right corner of the programme.

It is not recommended to exit the system by closing browser window as the session is then left open which causes data security risk if the workstation is left unattended. Also the licence reserved to the session is not vacated.

2.4 Expired session

The session expires when the time the CGI DataCycle360 system has not been used exceeds the minimum value of the session cleanup interval which is defined in system properties. If the session expires, the user must log in the system again.

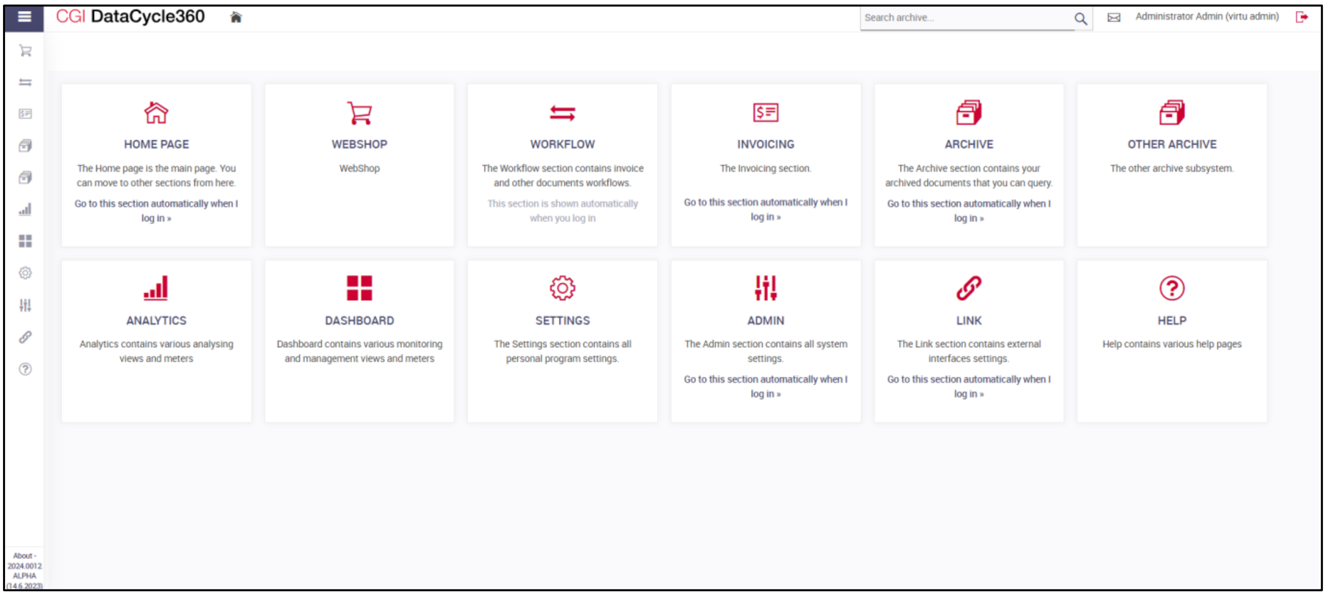
Usually the session is defined to be disconnected when it is left idle for more than 15 minutes

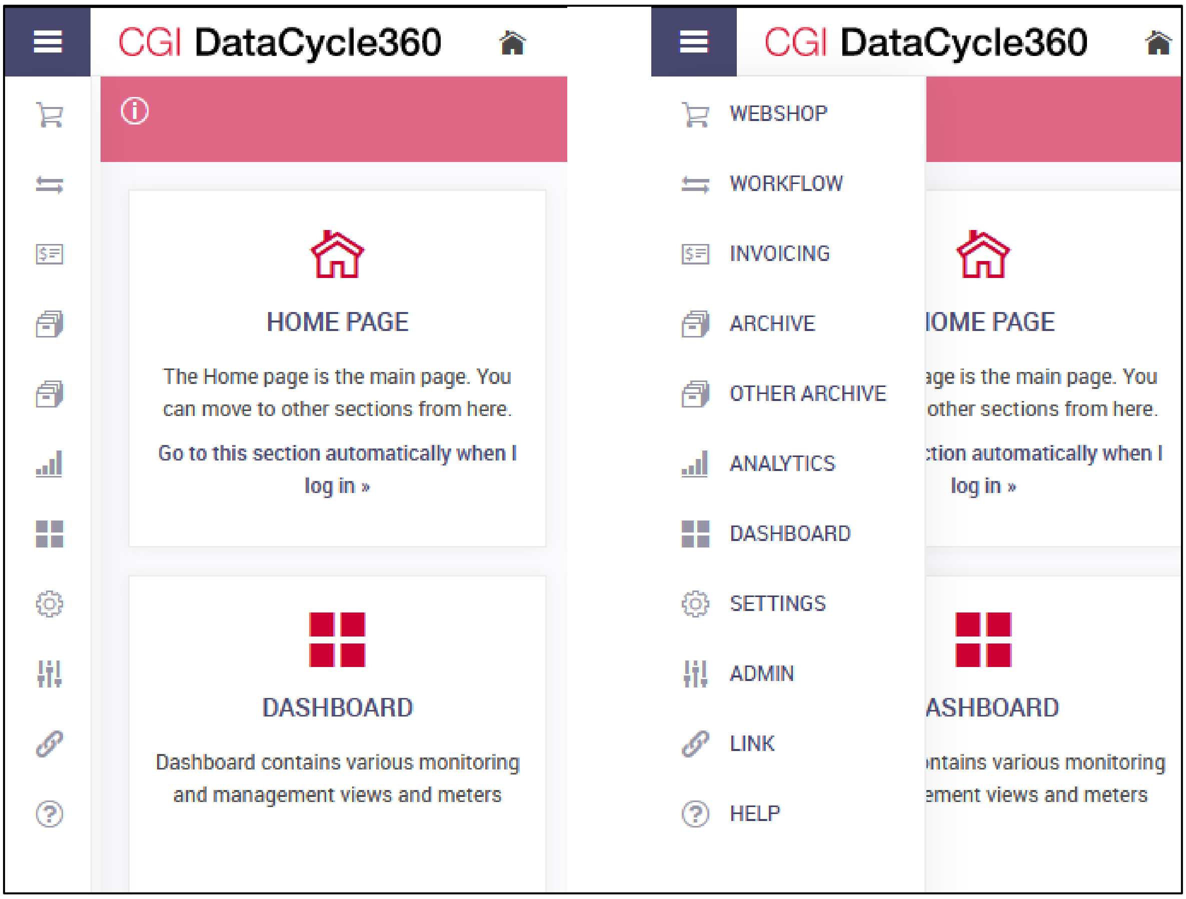


2.5 User interface

2.5.1 Home page

When the user logs in CGI DataCycle360, opens a home page matching his/her authorizations showing the features the user is entitled to. The example below is the home page of main user, default user has less functions available. A user might have authorizations only to use Archive module and then there would only be Archive and Settings modules visible.





2.5.2 Modules

CGI DataCycle360 is a modular system. Visibility of each module is dependent on which modules are at use and which modules the user has access to. thus most users cannot see all the modules described below:

- Archive: Archived documents
- Workflow: the documents being routed.
- Admin: The definitions for administering the system. Visible only to the main users.
- Settings: The personal user settings; changing passwords, defining absences and other general settings. This module is visible to all users.
- Link: Administering the system interfaces. Usually available only to main users.
- Analytics: Analytics and monitoring views.
- Dashboard: Dashboards and monitoring views.
- Help: Internal documents such as manuals.

On home page there is 'Go to this section automatically when I log in' link attached to each module. Clicking the link sets the module in question as user default and next time the user logs in the set module is opened instead of home page. The same definition can be set in Settings module. (see Settings).

2.5.3 Parts of the user interface

CGI DataCycle360 user interface consists of following elements:

- On top in the bar there are Hide/Release -button, Home -button, the bread crumb trail that is used to navigation, Search archive - function, Messages, My worklist, the username of the logged in user,. and log out function.

  Settings opens when user clicked.
- The next bar from top includes the system messages, displayed in the red area.
- The left side bar is a navigation bar, including modules which user have authorization and the information (About) window (e.g. manuals). From ever function it is possible to change modules by clicking the module on the navigation bar.
- The bar on the right site of the navigation bar includes the subfunctions of currently active mainfunction. The contents change according to which function is active.
- The right side of the window includes varying information depending on the active function, e.g. the picture of the document being viewed. This window can be split into several sections depending on the function.
- Top right corner where the logged in user information is displayed, when we click on that username user should be able to navigate to settings window.

Between the left and right major frames there is a vertical bar splitting the sections. Corresponding split bar is used to split the right section into partitions. The split bar can be dragged to change its position and the partitions can be hidden or brought back to original size by clicking the split bar.

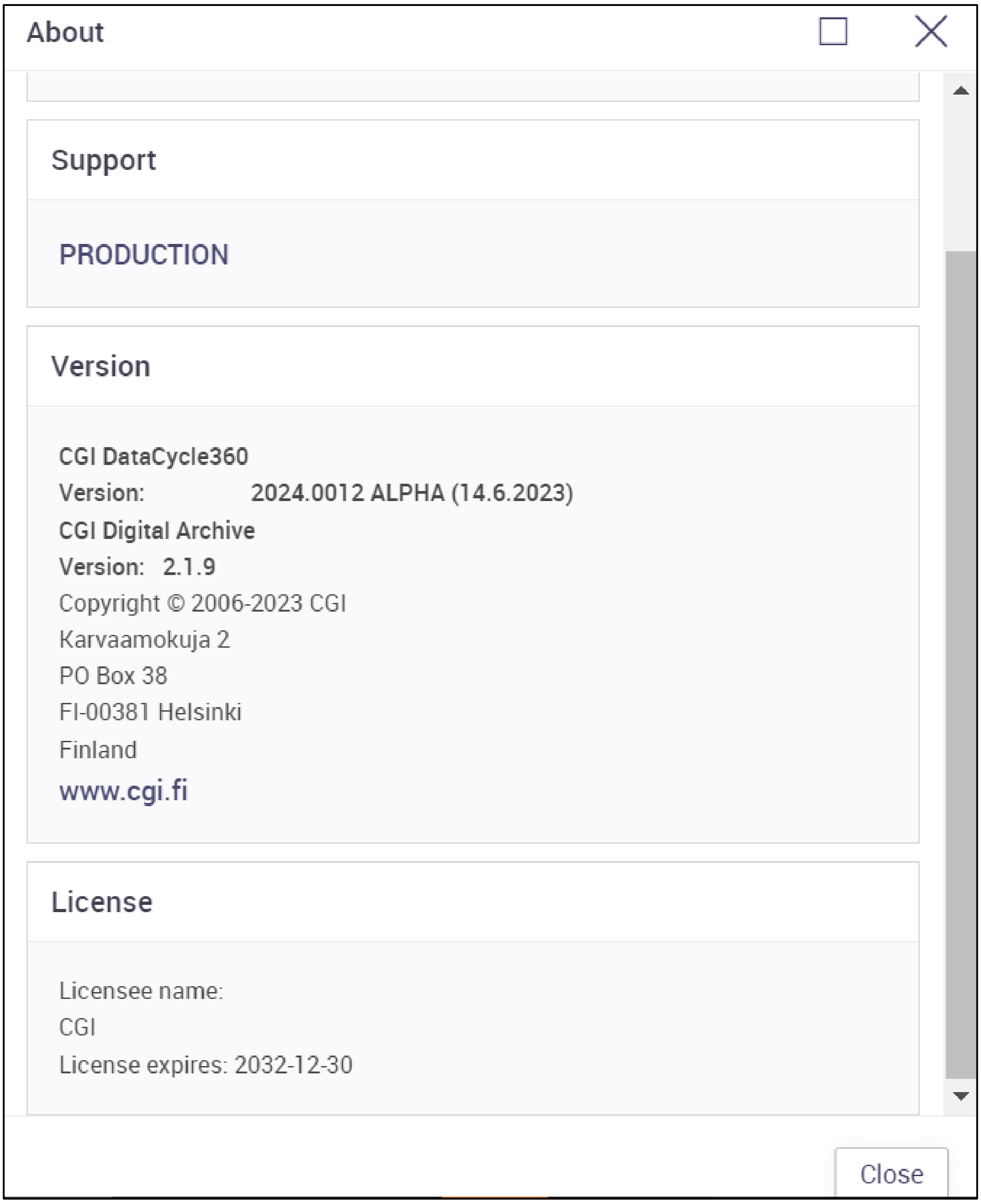
2.5.4 Navigation

CGI DataCycle360 is an ajax -application, which from user’s point of view means that the back and forward buttons of browser cannot be used to navigate inside the system. The CGI DataCycle360 user interface functions are to be used to navigate. The bread crumb trail is very useful feature to go back. The content of the bread crumb trail is updated according to the function used. Each part of the trail is a link to the function in question.

Using the system is largely based on context menus, which are opened with the right button of the mouse. The menu opened always shows the features attached to the selected subject the user have authority to.

2.6 About and Manuals

The **About** function opens a dialogue where the version number of the current CGI DataCycle360 programme, the information of the software, provider and the license information are presented.



The list of CGI DataCycle360 manuals is available in the **Manuals** link.

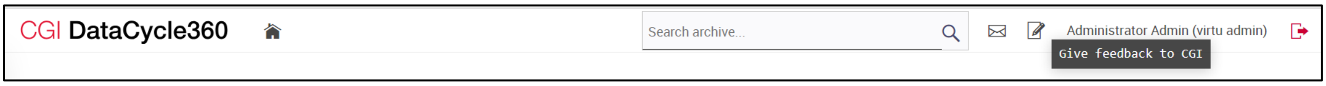
The customer's own support site is available in the **Support** link. User support sites are established outside the CGI DataCycle360 system, and references to these sites are defined separately for each instance. Each instance may have its own support site. Usually the page has been assembled information and instructions about using CGI DataCycle360 and the processes.

Information below the **Version** header contains the CGI DataCycle360 version number and CGI's address data. The link www.cgi.fi moves the user to CGIs Finnish website.

Information below the **License** header contains the licensee name and the date when the CGI DataCycle360 license expires.

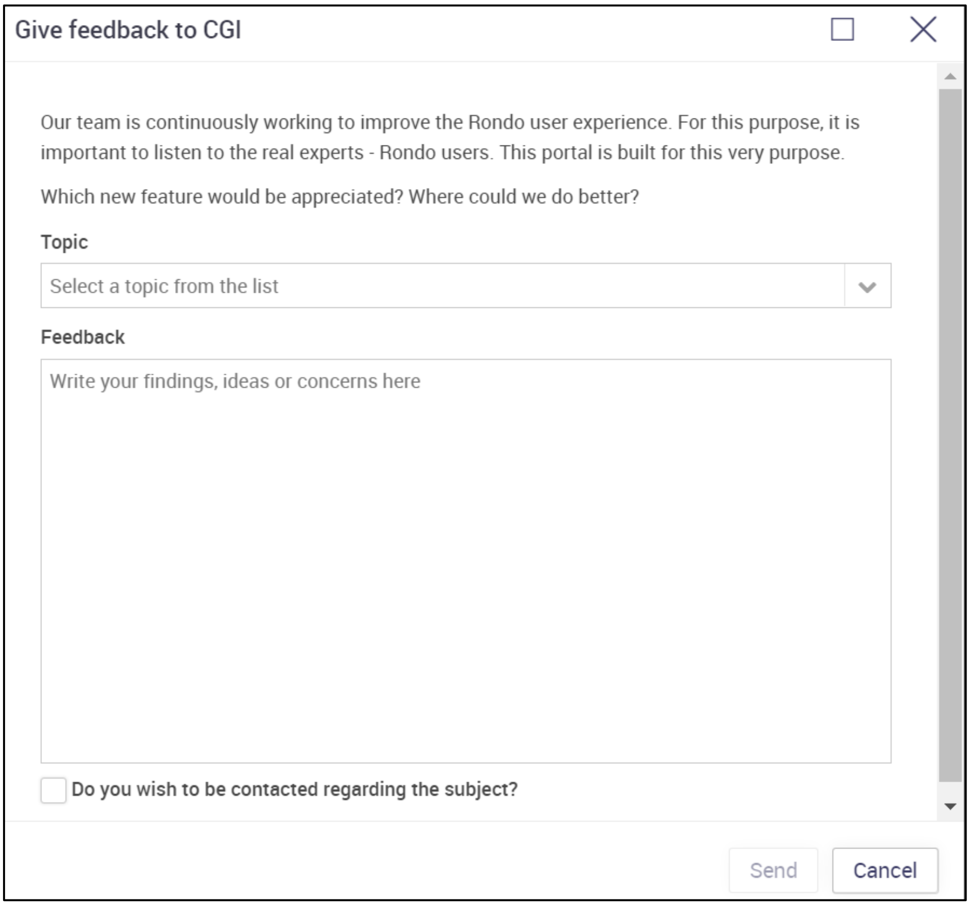
2.7 Give feedback

If **Give feedback**-feature is enabled, it is possible to send feedback related to CGI DataCycle360 via the **Give feedback**-button in the application header.



This opens up the **Give feedback**-dialog, which allows sending feedback related to functionalities in CGI DataCycle360 with a selection of predefined topics to choose from.

Note: the feedback is sent as an email to a configured feedback email address (configuration done separately), this means that the user must have an email address configured in order to be able to give feedback.



3 Searching documents

3.1 Background

Considerable part of using CGI DataCycle360 concerns searching documents. Basically all documents in workflow or archive can be searched according to every piece of document information and combination of several pieces of information. This also includes all history data of CGI DataCycle360 documents.

At a general level, the search function is identical in archive and workflow. Though in addition to workflow search features there is a possibility to create more complex searched and save searches for later use and also publish searches for other users to use. These extra features are described in Archive –manual.

Search archive -function, makes it possible to search documents not depending on their storage location and from several folders simultaneously. Text search does not recognize the text in pictures though.

3.2 Search

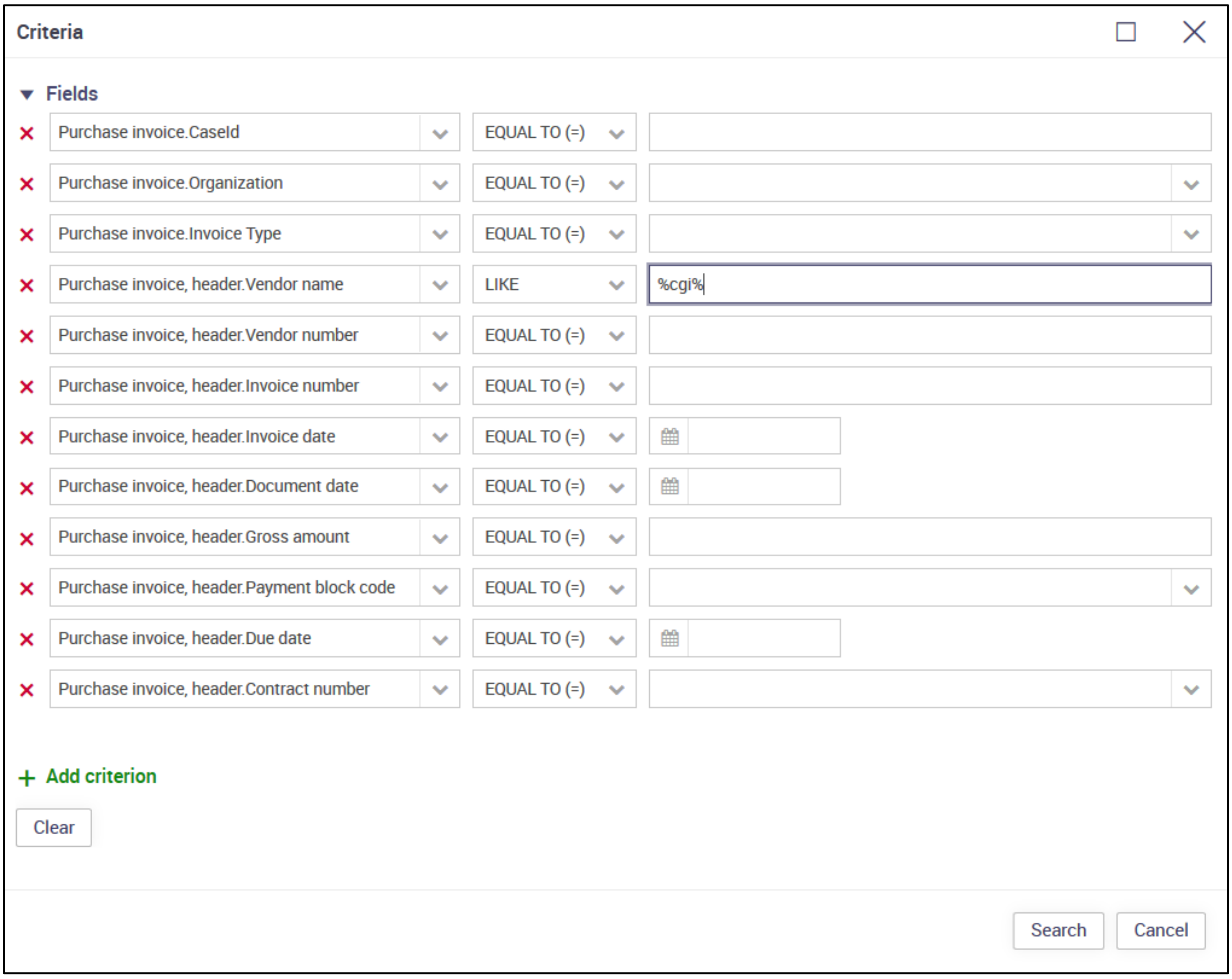
3.2.1 General

In the beginning of all search functions the search field, operator and value are entered. Such search criteria can be defined as many as needed.

- When there are several search fields defined at the same time, all criteria must be true.
- When there are several search criteria for the same field, some of the criteria must be true.

When the field is not defined a value, it is not included in the search. The operator IS EMPTY is used when empty value is searched.

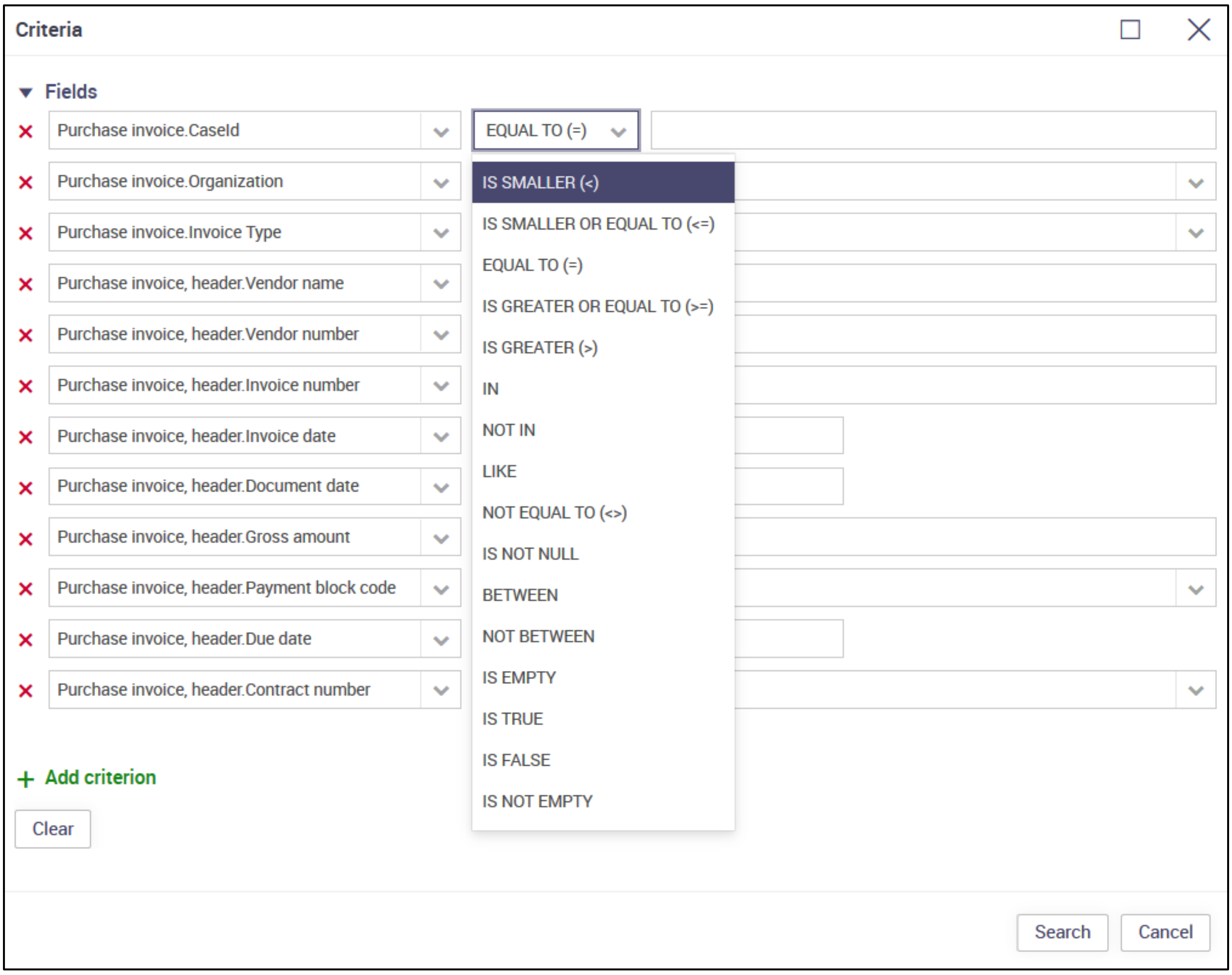
Confidential

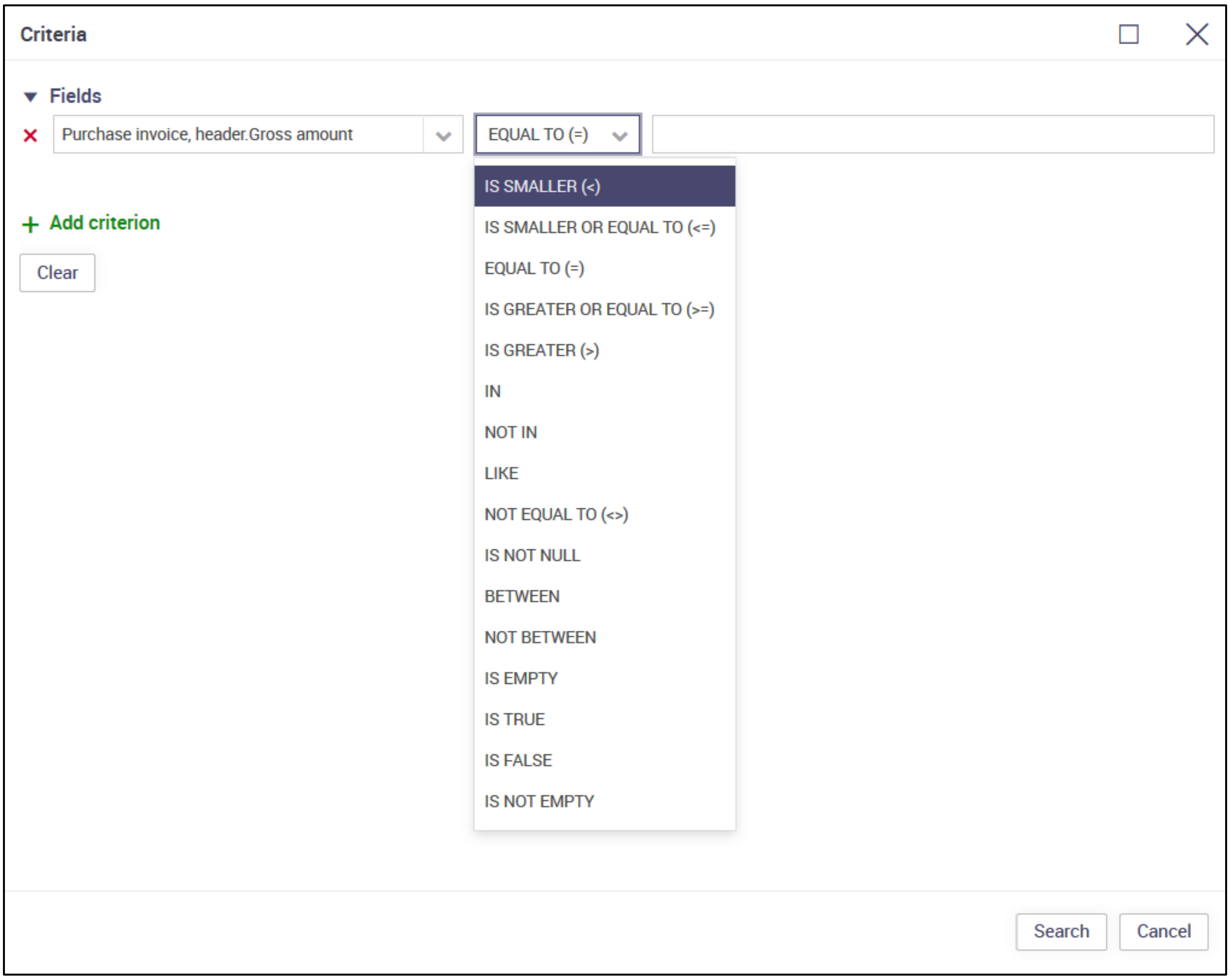


3.2.2 Search operators

The following search operators are available in archive queries. The same operators can be used in all fields not depending on data type, but some operators are rational only with certain data types. Notice that some values that appear numeric can still be character type. Thus e.g. invoice number > 1000 might return e.g. value 9 as then the comparison is based on alphabetic order.

Confidential


Criteria
Fields
Purchase invoice.CaseId
EQUAL TO (=)
Purchase invoice.Organization
Purchase invoice.Invoice Type
Purchase invoice, header.Vendor name
Purchase invoice, header.Vendor number
Purchase invoice, header.Invoice number
Purchase invoice, header.Invoice date
Purchase invoice, header.Document date
Purchase invoice, header.Gross amount
Purchase invoice, header.Payment block code
Purchase invoice, header.Due date
Purchase invoice, header.Contract number
IS SMALLER (<)
IS SMALLER OR EQUAL TO (<=)
EQUAL TO (=)
IS GREATER OR EQUAL TO (>=)
IS GREATER (>)
IN
NOT IN
LIKE
NOT EQUAL TO (<>)
IS NOT NULL
BETWEEN
NOT BETWEEN
IS EMPTY
IS TRUE
IS FALSE
IS NOT EMPTY
Add criterion
Clear
Search
Cancel



OPERATOR	FUNCTION
Operators that are rational with all data types.	
EQUAL TO (=)	Equal. The operator searches the value as such. E.g. a* finds a character combination a*, not combination beginning with a. When wildcard characters are used the operator LIKE must be used.
NOT EQUAL TO (<>)	Unequal to
LIKE	Similar to. Wildcard character % can be used to replace what ever character combination. E.g. No% finds all values beginning with No.
IN	Some of the given values. Difference to operator BETWEEN is that IN query doesn't have to be logical sequence but are individual values.
NOT IN	Not in given range.

IS NULL	Is empty
IS NOT NULL	Is not empty
IS EMPTY	Value is empty
IS NOT EMPTY	Value is not empty.
Operators which make sense with boolean –type fields.	
IS TRUE	Value is true.
IS FALSE	Value is not true (-> false)
Operators which are rational only with numeric, date and date-time types of fields. They do function also with alphanumeric fields but then based on alphabetic order.	
IS SMALLER (<)	Smaller than.
IS SMALLER OR EQUAL TO (<=)	Smaller than or equal to.
IS GREATER OR EQUAL TO (>=)	Equal to or bigger than.
IS GREATER (>)	Bigger than.
BETWEEN	Between given values.
NOT BETWEEN	Not in between values.

3.2.3 Search examples

3.2.3.1 Alphanumeric -type fields

In such search fields, it is advisable to use the LIKE condition and the so-called percent sign (%) to replace the beginning or the end of a word. The following are examples of the search function:

Search field name	Operator	Search text	Description
Vendor	**EQUAL TO (=)**	Yritys Oyj	Searches documents whose vendor information is “Yritys Oyj”

Vendor	**LIKE**	Yri% "Yr*"	Searches documents whose vendor information begins with the string "Yri"
Vendor	**LIKE**	%rit% "*rit*"	Searches documents whose vendor information contains the string "rit", e.g. the vendor "Yritys Oyj"
Access key	**LIKE**	%pinv_%	Searches all access keys that contain the string "pinv", e.g. pinv_user, pinv3_user
Access key	**LIKE**	%pinv[_]%	Searches all access keys that begin with the string "pinv_", e.g. pinv_user
Person	**LIKE**	**%**Jaakko%	Searches documents whose personal information contains the word "Jaakko", e.g. "Jaakko Virtanen", "Liisa Jaakkola"

3.2.3.2 Numeric –type fields

It is also possible to search for information in search dialogues e.g. with the vendor number and the gross amount. With these search criteria, it is possible to use various comparison signs. The following are examples of the search function:

Search field	Operator	Search text	Description
Number field	EQUAL TO (=)	"5"	Searches the exact value 5
Number field	LIKE	"5*"	Searches figures beginning with 5
Number field	LIKE	"*5*"	Searches all figures containing 5 at any point
Number field	LIKE	"*5"	Searches figures ending with 5
Vendor number	EQUAL TO (=)	25642 "25642"	Searches vendors whose number is exactly 25642
Gross amount	EQUAL TO (=)	50000	Searches documents whose gross amount is EUR 50,000
Gross amount	IS GREATER (>)	50000	Searches documents whose gross amount is greater than EUR 50,000
Gross amount	IS GREATER OR EQUAL TO (>=)	50000	Searches documents whose gross amount is greater than or equal to EUR 50,000

Gross amount	IS SMALLER (<)	50000	Searches documents whose gross amount is smaller than EUR 50,000
Gross amount	IS SMALLER OR EQUAL TO (<=)	50000	Searches documents whose gross amount is smaller than or equal to EUR 50,000
Gross amount	NOT EQUAL TO (<>)	50000	Searches documents whose gross amount is unequal to EUR 50,000
Gross amount	BETWEEN	50–100	Searches documents whose gross amount is between EUR 50–100
Gross amount	NOT BETWEEN	50–100	Searches documents whose gross amount is not between EUR 50–100
Gross amount	IN	100, 200, 300	Searches documents whose gross amount is either EUR 100, 200 or 300
Gross amount	NOT IN	100, 200	Searches documents whose gross amount is not EUR 100 or 200
Gross amount	IS NOT NULL		Searches documents whose gross amount is not null
Gross amount	IS EMPTY		Searches documents whose gross amount is empty

3.2.3.3 Date –type fields

Comparison signs can be used with search fields that are in date format and with numeric fields. Such fields could be, for example, invoice date, due date, document date, entry date and GRN date. The following are examples of the search function:

Search field	Operator	Search text	Description
Document date	EQUAL TO (=)	11.12.2007	Searches documents whose document date is exactly 11 December 2007
Document date	IS GREATER (>)	11.12.2007	Searches documents whose document date is greater than 11 December 2007
Document date	IS GREATER OR EQUAL TO (>=)	11.12.2007	Searches documents whose document date is smaller than 11 December 2007
Document date	IS SMALLER (<)	11.12.2007	Searches documents whose document date is before 11 December 2007
Document date	IS SMALLER OR EQUAL TO (<=)	11.12.2007	Searches documents whose document date is before or exactly 11 December 2007
Document date	NOT EQUAL TO (<>)	11.12.2007	Searches documents whose document date is not 11 December 2007

Document date	BETWEEN	1.12.2007–30.12.2007	Searches documents whose document date is in December 2007
Document date	NOT BETWEEN	1.12.2007–30.12.2007	Searches documents whose document date is not in December 2007
Document date	IN	11.12.2007, 12.12.2007	Searches documents whose document date is either 11 December 2007 or 12 December 2007
Document date	NOT IN	11.12.2007, 12.12.2007	Searches documents whose document date is neither 11 December 2007 nor 12 December 2007
Document date	IS NOT NULL		Searches documents whose document date is not null
Document date	IS EMPTY		Searches documents whose document date is empty

3.3 Search results

3.3.1 General

Each query returns a document list. Document search usually returns the header fields, definition and master data searches return the data relevant to definition/master data or some of it.

From the search result set you can:

- Open a document/data for viewing (see view document).
- Open additional documents attached to the document (see Field link).
- Perform operations which vary depending on whether the document is in approval routing, archived document or e.g. user. Naturally the authorizations of the user and the current workflow step also affect the operations available. Available operations are listed in the menu opening with the right mouse button.
- Perform mass change to selected items (see mass change). (see document list functions).

You can choose several documents from search results and perform the same operation to all rows at once.

Queries including Group by definition return, instead of single documents/data, groups of documents/data from which you can drill down to lower levels down to a single document. (see drilling and grouping).

3.3.2 Search result

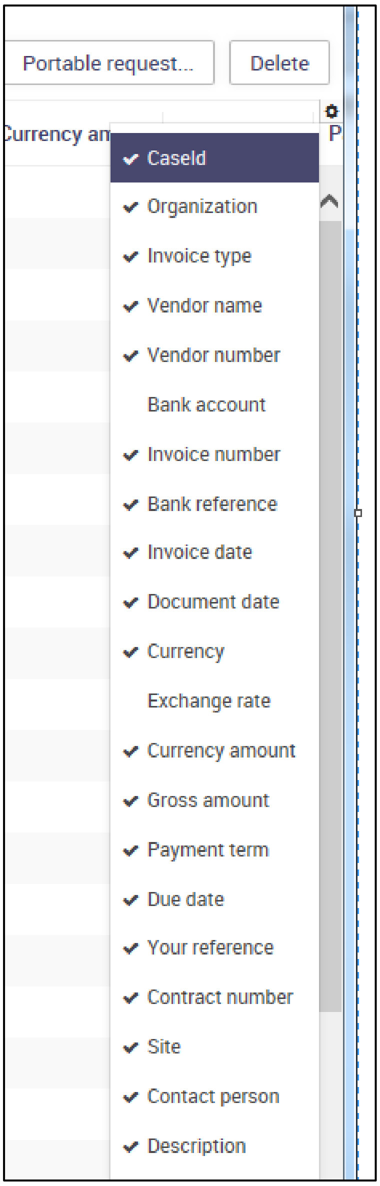
In the Results dialogue, the user can sort rows, change the order of the columns and hide columns.

The search result is **sorted** by clicking the column’s header. In the example below, sorting has been made in descending order (arrow down) according to the invoice date.

Invoice date
13/09/18
01/09/18
23/08/18
23/08/18
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15
06/11/15

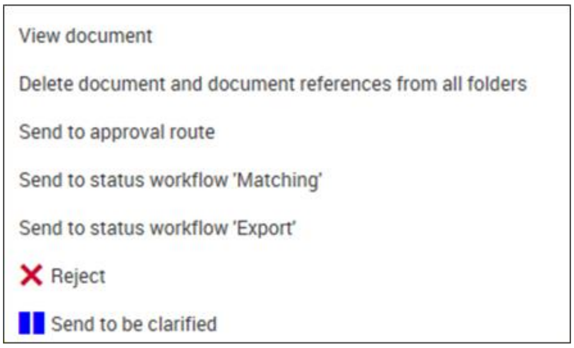
The order of the columns is changed by dragging the column header to the left or to the right to the desired position.

The columns are hidden in the field list which can be opened with the gear icon on the top right corner of the search result list. The fields that the user wants to hide are removed from the field list by removing the tick in front of the field in question and after which fields won't be displayed in the search result anymore.



3.3.3 Handling a document

Documents selected in the list are handled with menu item functions available by clicking the right button of the mouse. The functions displayed in the menu depend on the system's settings, document type, user rights and the phase of the route when routed document.



The **View document** function opens a document dialogue where the document's image, header data and posting will be displayed.

The document dialogue can also be opened by selecting the document's CaseID number in the list. The document will be handled with functions in the document dialogue.

The selected document is deleted with the function **Delete document and document references from all folders**. Delete -function is usually available only to main users.

The rest of the functions in the picture above are connected to processing documents in approval route. As the available features depend on the location of the document (workflow or archive) and the authorizations of the user, the selections might vary a lot. Same functions are available in document list and document window.

The selected document is sent to next processors with functions available in the dialogue under the menu item **Send to approval route**.

Status workflows are defined for each workflow separately, and the time when the document is sent to the status workflow can be defined to take place at a certain workflow phase. In the example above, it has been defined that the user has the possibility to send unrouted documents to status workflows "PO matching" and "Export".

The **Reject** function sends the document back to the user who is responsible for document management. The user must provide a comment if he/she rejects a document.

The **Send to be clarified** function moves the document to the user's own folder for documents requiring further investigation.

3.3.4 Field link

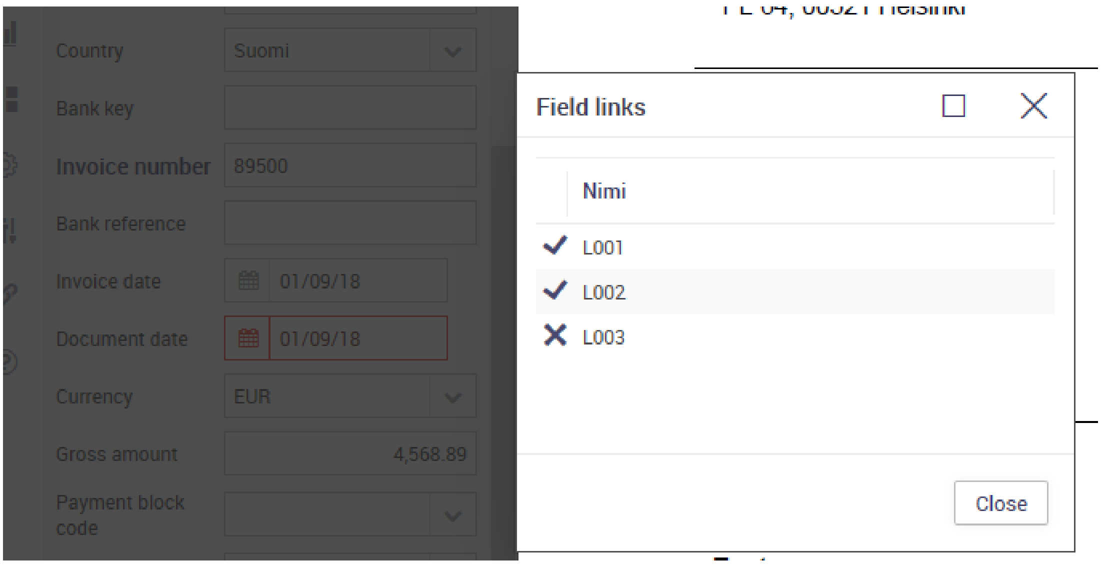
The information in various document folders is connected to one another with field links. The document folder field is linked to a field in another folder. For example, the purchase invoice folder can be linked to the order folder on the basis of the order number field.

It is possible to define links between associated documents in order to make it easy to transfer from one to the other. Examples of common field links:

- link between framework agreement and contracts attached to it
- link between a memo voucher and correcting purchase invoice

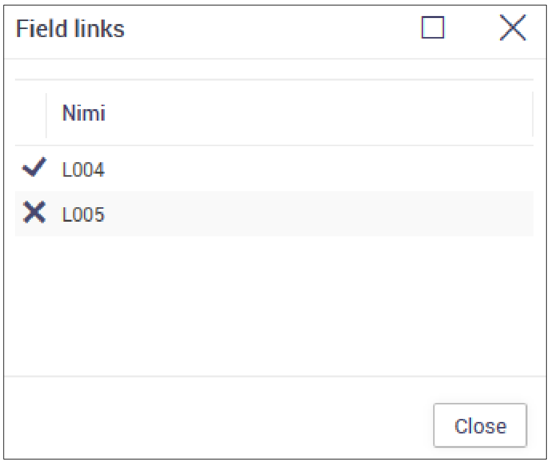
In case a document is connected with other documents, the linked documents can be accessed from document list. And again the same links can be opened from the document list and the document window.

The field link attached to a header field can be recognised by differing colour and boldness of the field name. Clicking the link opens a link-window. In case there are several links in the same field, the link is selected from Field links list and the linked document is drilled into.



A row level field link is shown on the row as an icon: 

The icon is selected and the rows attached are accessed.



3.3.5 Hyperlink

A document header field can be linked to a hyperlink field. Clicking on the hyperlink field in the documents header or document list, the resultant page is displayed in the frame in the new window, which displays extra information regarding the case.

Confidential

3.3.6 Drilling down and grouping

3.3.6.1 General

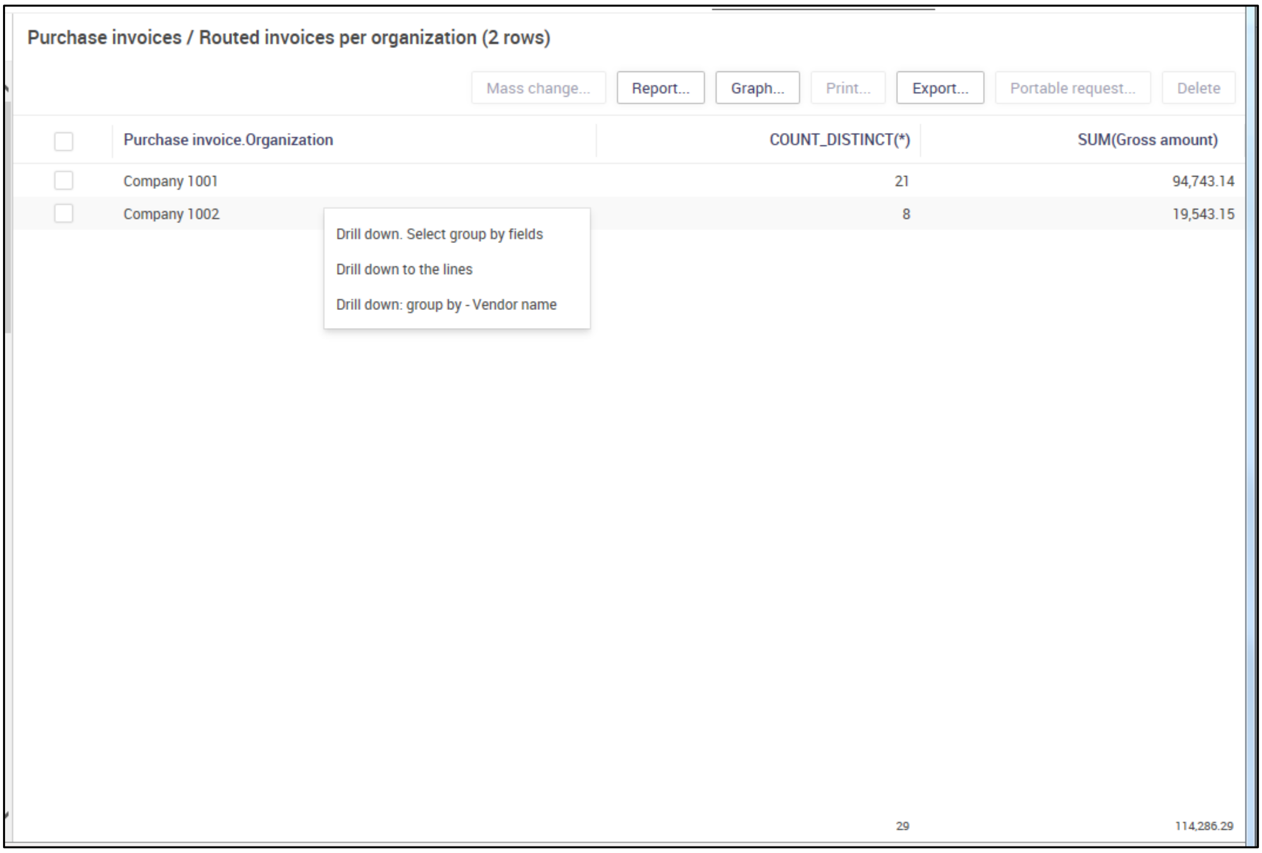
The user can group a query executed as an advanced query as he/she wants, and the user is able to drill down to individual lines from the sum-level query executed as an advanced query.

Drilling and grouping query is optional and available for extra fee. Grouping query is described in the archive manual.

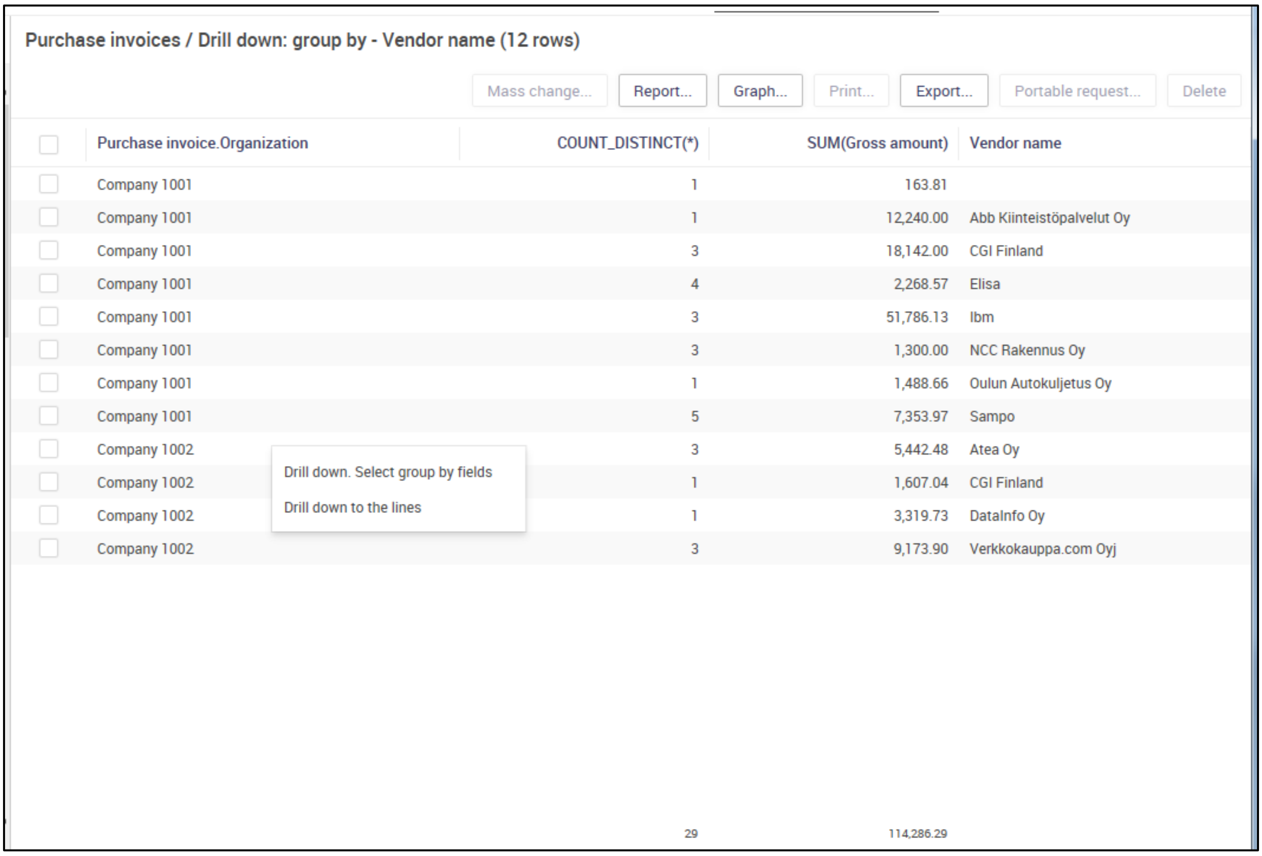
Each grouping performed by the user will be opened into a separate Result dialogue. The user can move from one result dialogue to another by using a "breadcrumb".

3.3.6.2 Example

In the example below the purchase invoices index has been defined an amount level query. The menu opening with the Right mouse button shows the available grouping options.



Drill down: group by Vendor name –function opens the search results in a new results window as seen in the picture below.


Purchase invoices / Drill down: group by - Vendor name (12 rows)

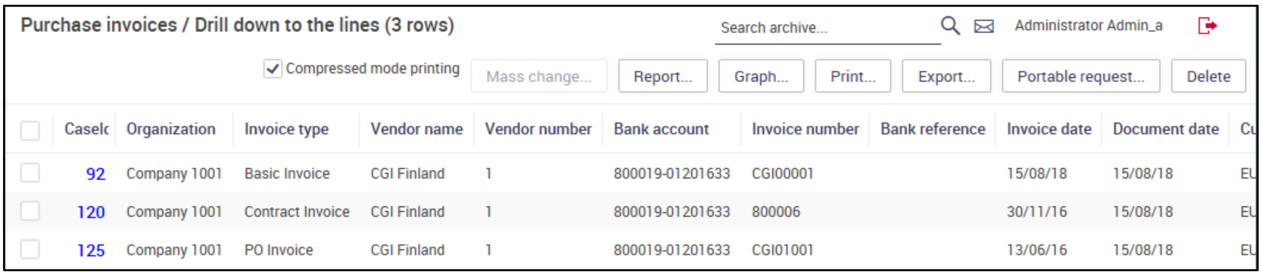
Mass change... Report... Graph... Print... Export... Portable request... Delete

Purchase invoice.Organization	COUNT_DISTINCT(*)	SUM(Gross amount)	Vendor name
Company 1001	1	163.81	
Company 1001	1	12,240.00	Abb Kiinteistöpalvelut Oy
Company 1001	3	18,142.00	CGI Finland
Company 1001	4	2,268.57	Elisa
Company 1001	3	51,786.13	Ibm
Company 1001	3	1,300.00	NCC Rakennus Oy
Company 1001	1	1,488.66	Oulun Autokuljetus Oy
Company 1001	5	7,353.97	Sampo
Company 1002	3	5,442.48	Atea Oy
Company 1002	1	1,607.04	CGI Finland
Company 1002	1	3,319.73	DataInfo Oy
Company 1002	3	9,173.90	Verkkokauppa.com Oyj
	29	114,286.29	

Drill down. Select group by fields

Drill down to the lines

The function **Drill down to the lines** opens the results in a new window as follows:


Purchase invoices / Drill down to the lines (3 rows)

Search archive... Administrator Admin_a

Compressed mode printing Mass change... Report... Graph... Print... Export... Portable request... Delete

CaseIc	Organization	Invoice type	Vendor name	Vendor number	Bank account	Invoice number	Bank reference	Invoice date	Document date	Cu
92	Company 1001	Basic Invoice	CGI Finland	1	800019-01201633	CGI00001		15/08/18	15/08/18	EU
120	Company 1001	Contract Invoice	CGI Finland	1	800019-01201633	800006		30/11/16	15/08/18	EU
125	Company 1001	PO Invoice	CGI Finland	1	800019-01201633	CGI01001		13/06/16	15/08/18	EU

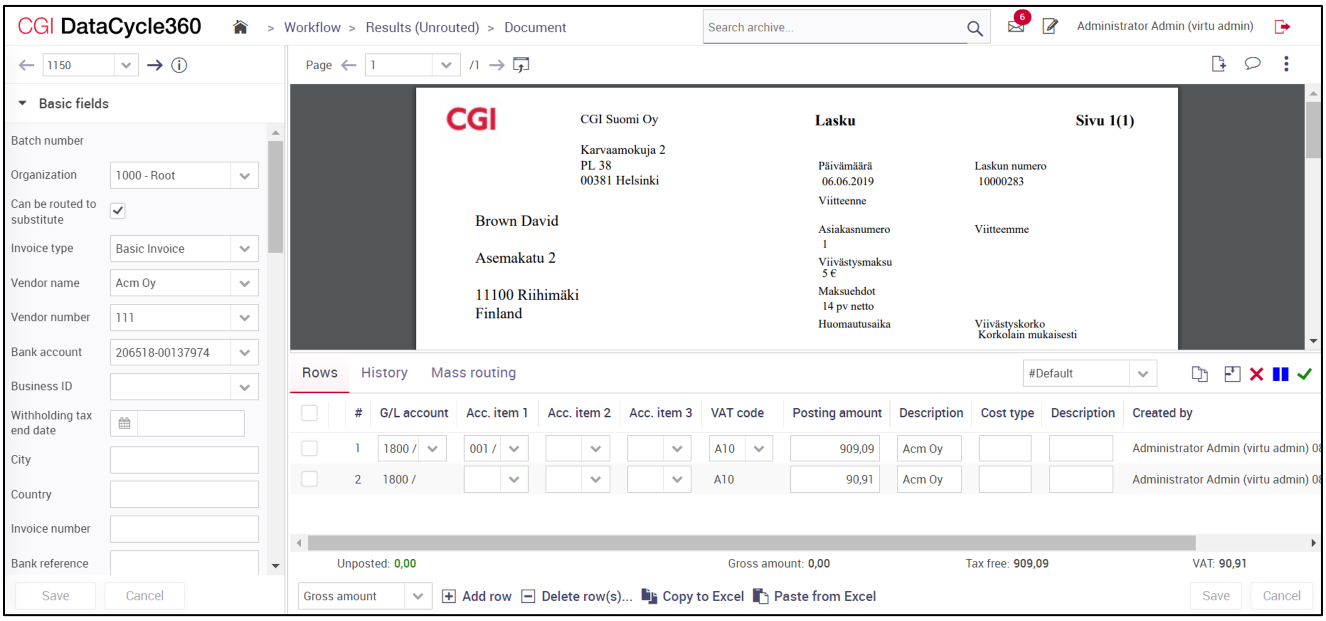
4 Document view

4.1 Viewing a document

4.1.1 General

When the user wants to examine a document in more detail, the desired document is selected in the Results dialogue by clicking the CaseID or by selecting the “View document” function available by clicking the right button of the mouse.

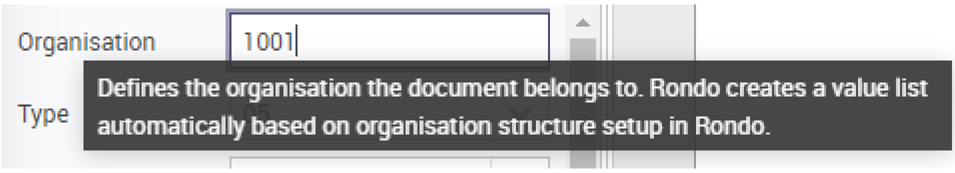
The system will open a document dialogue where an image of the document, as well as the document’s header and its row data are displayed. The document can be processed further with the functions in the document dialogue.



The user authorization and the type of the document define whether the user can only view the document or if he can process it in some other ways. Commonly the end user can view the document and add comments to the document. Depending on the process it might also be possible to:

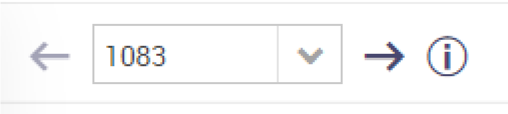
- update the document information
- edit the document

4.1.2 Tooltips



System gives more information about the document's header field and its value as tooltips. To view the tooltips, position the cursor on top of the field name or field value.

4.1.3 Browsing documents in the document dialogue



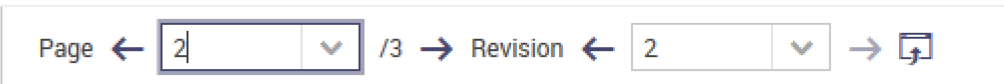
The user browses documents in the **Basic data** framework in the **Document** dialogue on the basis of CaseId, either with arrow keys or by selecting the document number in the picklist.

4.1.4 Page, revision and rendition

One document page may include different **revisions**. E.g: Document page is a word-document. Word-document is updated and the updated version is uploaded to CGI DataCycle360 by using function **Replace current page with another.** The updated word-document forms a new document page revision in CGI DataCycle360.

A document page or document page's revision may also include different **renditions**. E.g: Document page is a Word-document. Word-document is saved in pdf-format and it is then imported to CGI DataCycle360 by using function **Add a new rendition to the page**. This pdf-file forms a new **rendition** to a document page. A new rendition can be added to a document page or to a document page's revision.

4.1.5 Browsing pages, revisions and renditions



The user can browse the document's pages with the picklist or arrow keys (← previous page, → next page) located in the bar above the image next to **Page**.

Revisions which may have been added to the document's pages can be browsed with the picklist or arrow keys (← previous page, → next page) located in the bar above the image next to **Revision** (See **Editing a document** for more information).

If the document contains several pages, the page number of the open page and the total number of pages are displayed in the bar. For example, 3/3 means that the document has three pages and page number 3 is displayed.

Confidential

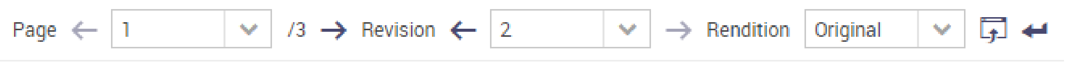
The revision field always contains the most recent revision of the page which at the same time indicates the total number of revisions.

Open the page in new dialogue function opens the page in a new dialogue.

Renditions which may have been added to the document's pages or to the revisions of the pages can be browsed by using the picklist in **Rendition** –field (See **Editing a document** for more information). The original rendition of the document page or the original rendition of the document page's revision will be shown as a default, unless specified otherwise by setting some other rendition as the default, using the **Default** checkbox.

Top bar, when a rendition is added to a document page, e.g:

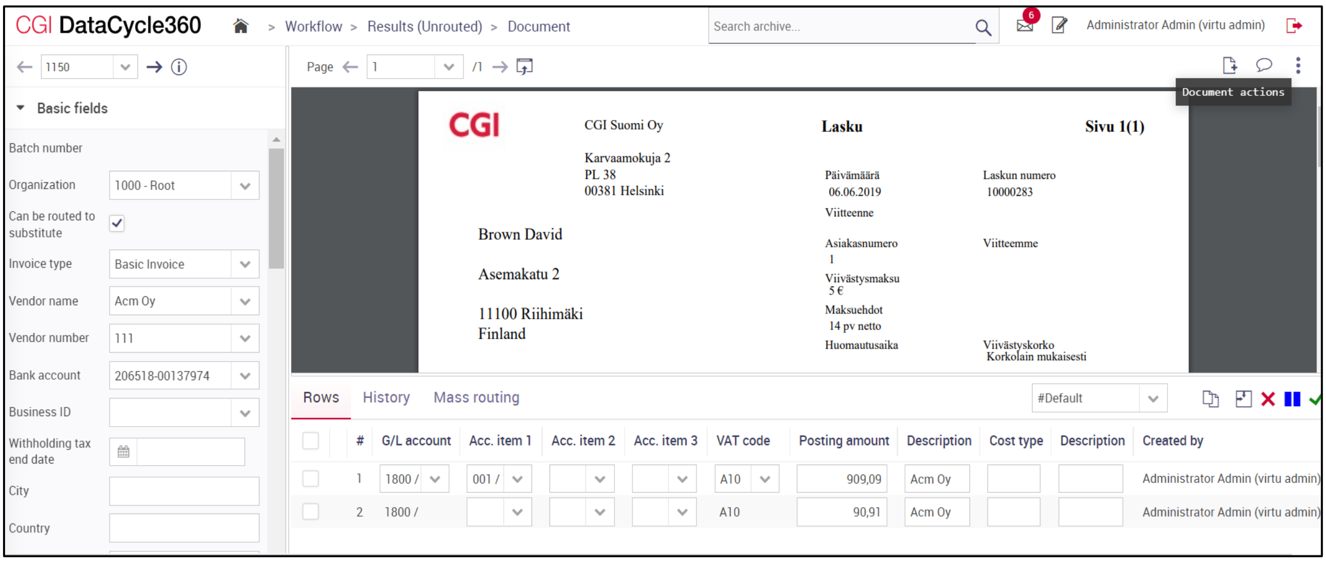
Top bar, when a rendition is added to a revision of a document page, e.g:



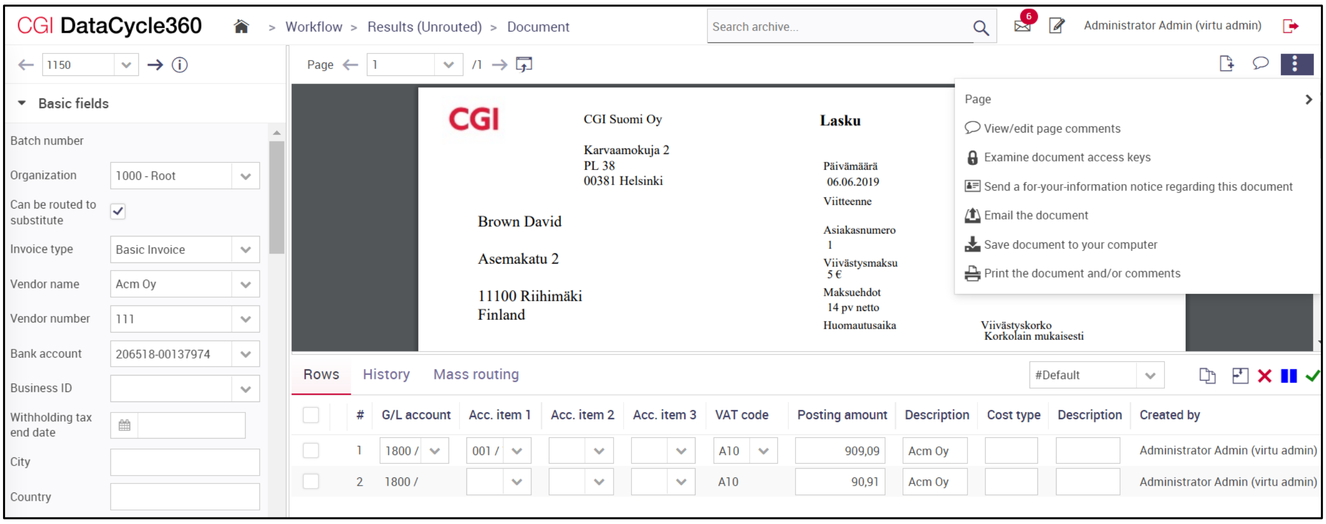
4.2 Document actions

Document handling functions are located on the document view on the right side of the action bar in the menu that opens from the Document action (three dots) button.

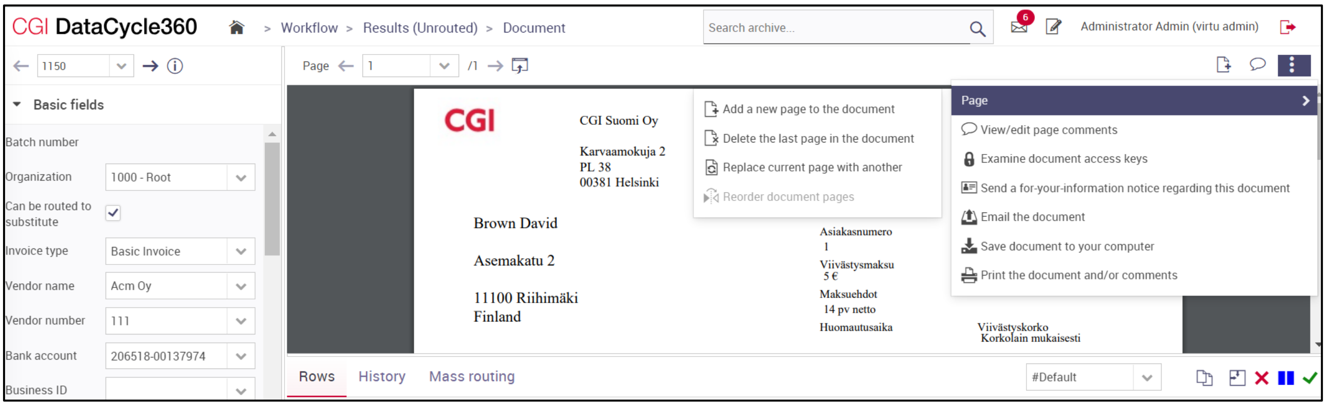
The add page and -comments buttons are also available in the main menu of the document view. The user can access these directly from the top menu instead of having to open the action menu.



Clicking the button turns dark and opens a menu with document actions.



Page selection opens a menu with Page actions.



4.3 Schortcuts

Shortcuts are combinations of keys that provide an alternative way to do something that you'd do with a mouse. You can see the combinations of the keys, when point with m a ouse the button Save, Cancel. Add row, or Delete row(s).

Press this key	To do this
Alt + S	Save document header
Alt + C	Cancel document header changes
Alt + T	Save document row(s) e.g. posting rows
Alt + P	Cancel document row changes e.g. posting row(s)

Shift + Ins	Add row add new e.g posting row
Shift + Del	Delete row(s), e.g. posting row, delete the marked rows

4.4 View/Edit comments on the page

4.4.1 General

The user is able to add comments in the documents in CGI DataCycle360. A comment is free-form text relating to the document.

Comments are useful when the users want to add follow-up information or notes in the document. If the user rejects a document, he/she must provide a comment.

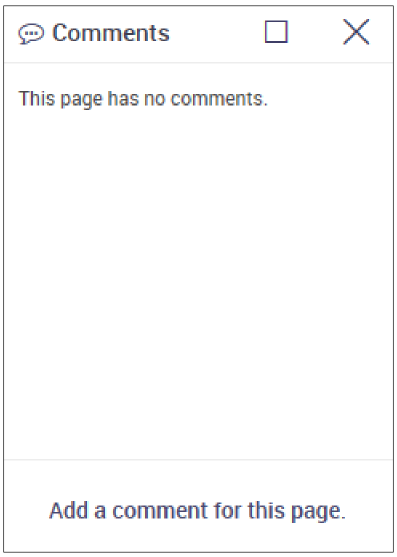
The comments saved in CGI DataCycle360 are permanent i.e. they can be added but the comments saved before cannot be changed or deleted.

With some workflow functions the comment is compulsory, typically so when the routing of a document is cancelled.

Comments are page-specific and they can be added to each document page. It is recommended that comments are placed on the first page of a document because thus the other users can easily notice the comments.

4.4.2 Add a comment

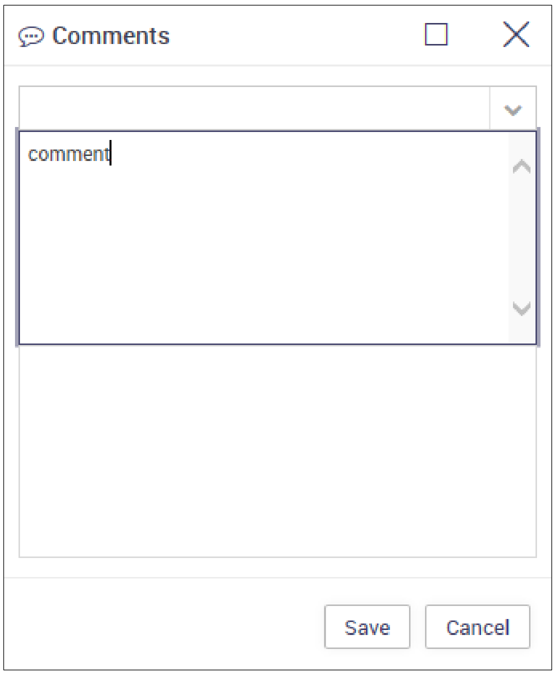
When the user clicks the **View/Edit comments on the page** button from the Document action (three dots) or from the main menu on the view document page, the system will open a moveable dialog window, where existing and new comments can be viewed and added.



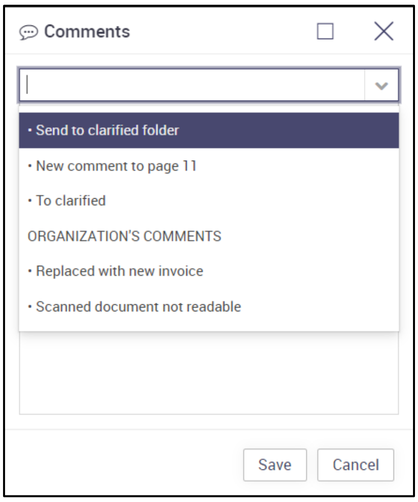
Confidential

If the document does not contain comments, the text **This page has no comments** is displayed in the framework.

The user can add a new comment for the page with the function **Add a comment for this page**.

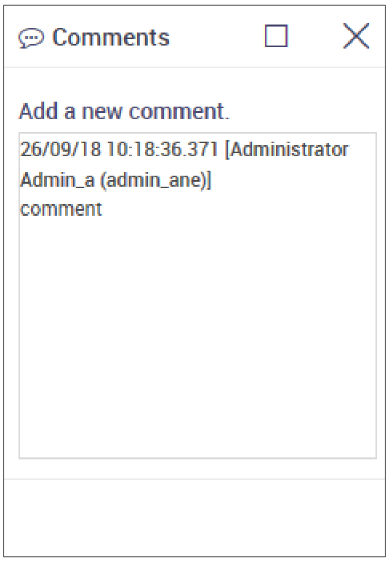


The user is able to view his/her previous comments with the help of the picklist and also organisation-specific comment templates which have been defined in the settings of the system's section Admin/Workflow/Workflow. Both the previous comments and the templates can be made use of when entering new comments in the document.



The comment is entered in the white area in the adding dialogue and attached to the document with the **Save** function. The date and time and the author of the comment are saved automatically.

If the document contains previous comments, the new comment is added with the function **Add a new comment.**.



The comment is visible on top of the document's page. The user can minimise/maximise the comment dialogue by dragging the framework from the bottom right corner. All comments in the document are displayed one after the other, with the most recent comment on the top.

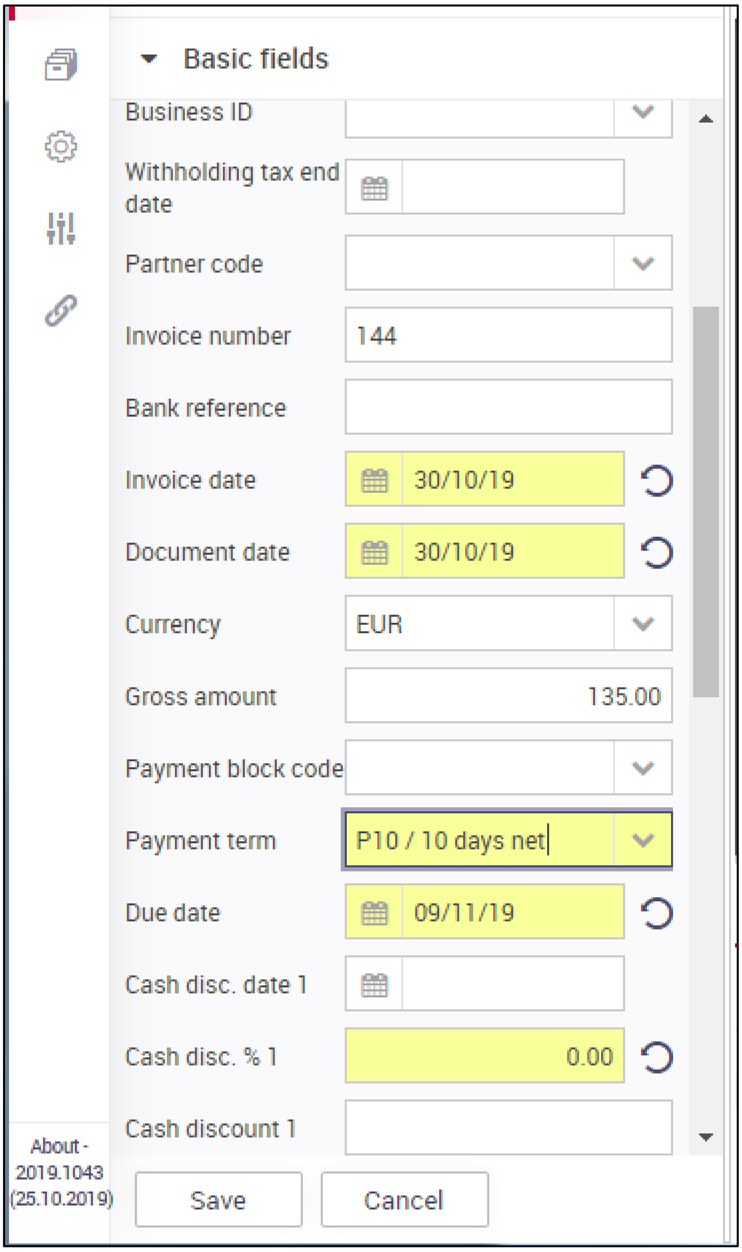
The **Cancel** button closes the dialogue for adding a comment without saving the provided comment.

4.5 Editing the header information of a document

4.5.1 General

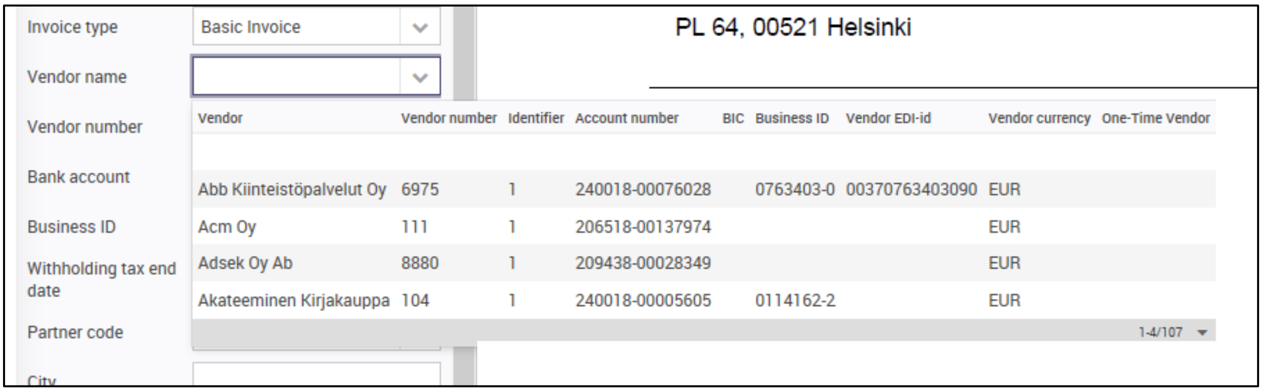
In case the user's authorizations allow the changing of document information, the fields can be entered desired values or the values can be selected from pick lists attached. When a value of a field is changed the base of the field turns yellow, an icon about the change appears on the right side of the document and the **Save** and **Cancel** -buttons appear at the bottom of the header fields frame.

Confidential

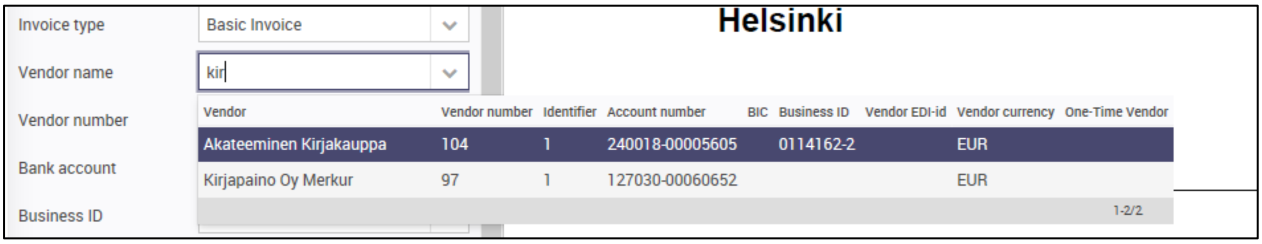


4.5.2 Search from the pick list

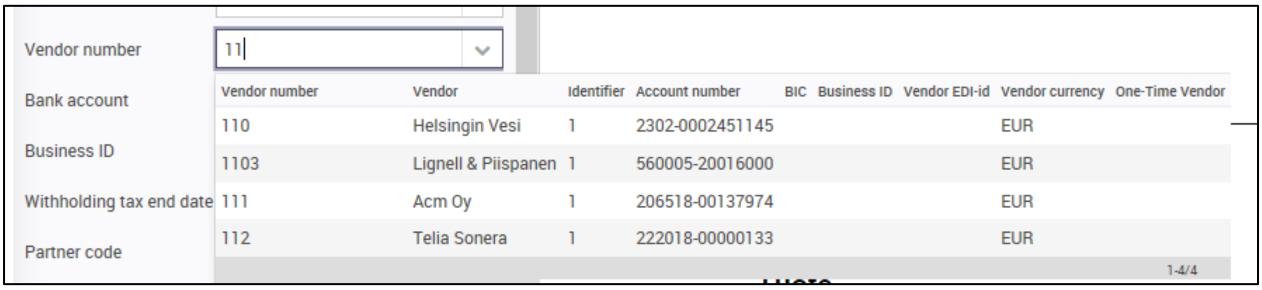
The fields including Pick lists in workflow, archive, admin module etc. (e.g. vendor name) there is a drop down list opening with  -button. The list shows 5 values at a time and it can be browsed forward/backward with the arrow buttons at the top and bottom of the list. The picklist opens always from the beginning of the list values.



The fields with Pick list can be searched by entering a string of characters. Then the dropdown list shows the rows including the given string of characters. E.g. when the letter combination ”kirj” is entered in vendor name field, the drop down list shows all vendor names including character string ”kirj.”



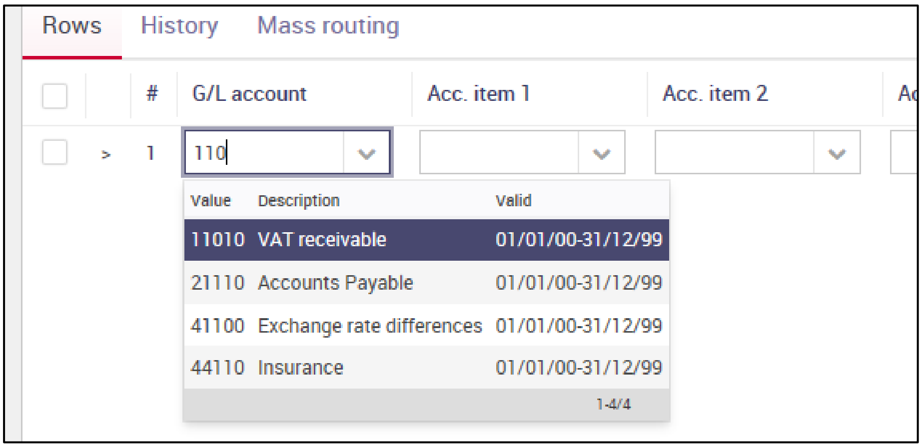
In the same way the vendor number field can be searched by entering e.g. 110, and the list shows all the vendors with number including ”110”.



The same search principles apply when searching e.g. the posting field account. E.g. enter ”110” in the account field and the list shows all account numbers that include number combination 110.

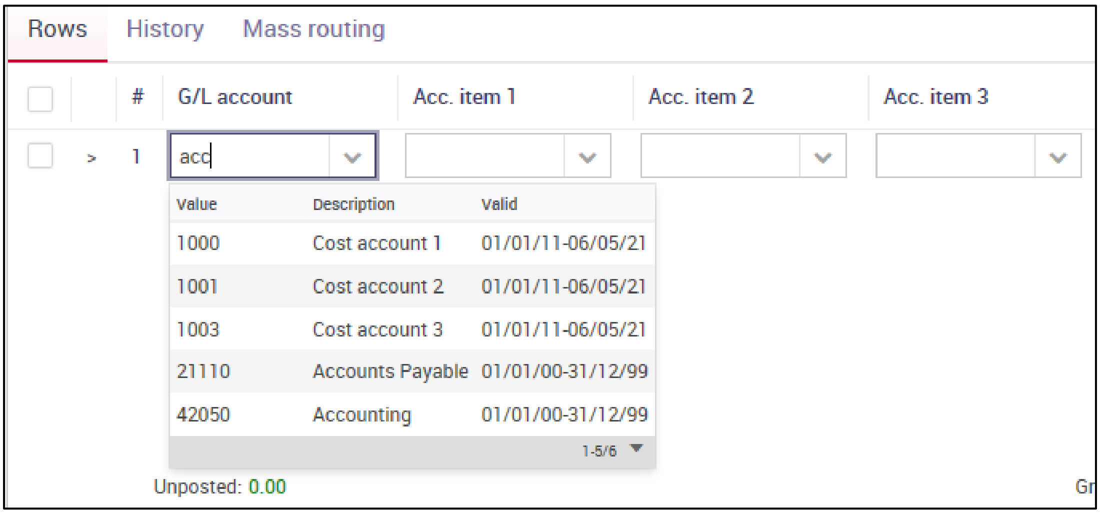
You can search similarly from all posting fields with a pick list.

Confidential

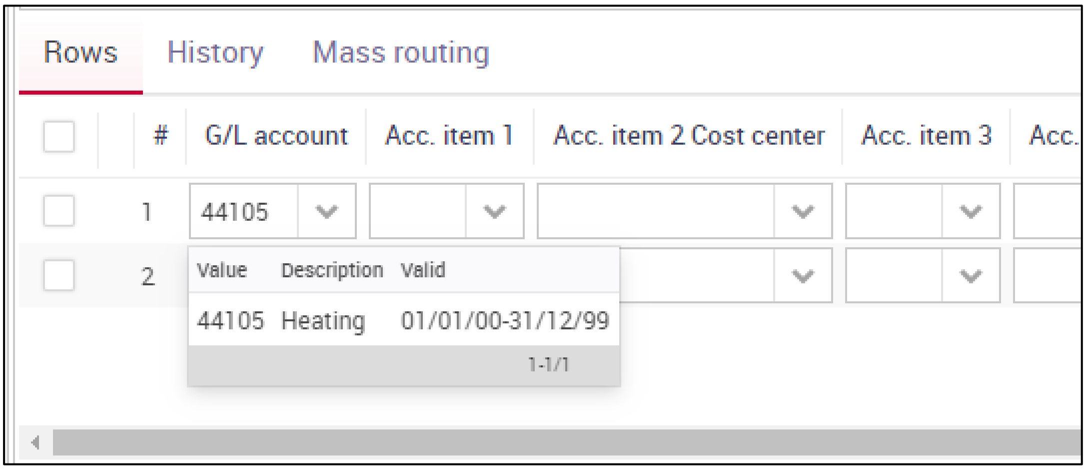


On posting rows you can also search with a field name. E.g. when the field account is given letter combination ”acc” the result list shows all accounts including characters “acc”.

You can search similarly from all posting fields with a pick list.



You can get the field value information by first click the field and then Arrow down or up -key.



4.6 Editing a document

4.6.1 General

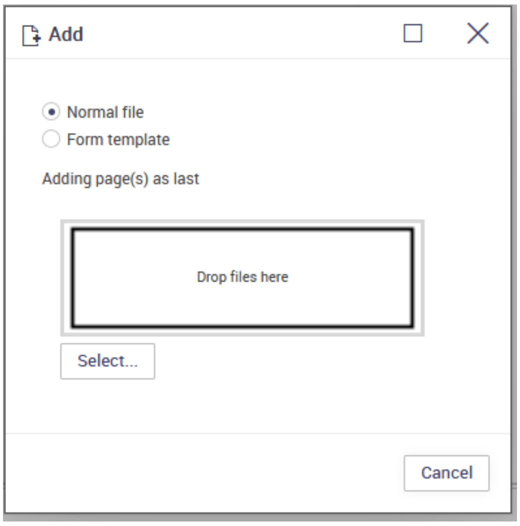
In some processes editing of the documents in workflow or archive is allowed. Sometimes adding attachments as additional pages from file or by scanning is allowed only (much used feature for adding attachments). Sometimes replacing the document pages is also allowed.

Deleting or replacing document pages creates a new valid version of the document. All previous versions are also saved and users can view them by version pick list.

4.6.2 Add a new page to the current document

The user adds new pages to the document with the function by right click on the Document action (three dots)/Page available on document view .The new page is added as the last page in the document.

The user searches the document to be added with the Select button. Alternatively, the user can drag-and-drop items into the drop area of the dialog.



The **Cancel** button closes the dialogue without adding a new page.

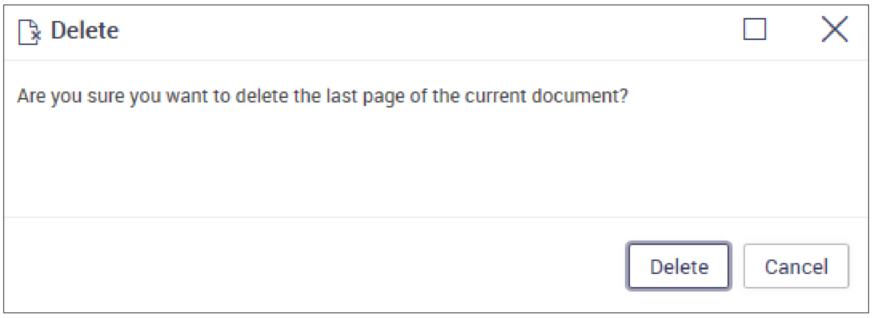
The page to be added can either be a normal page or an HTML Form set in the system.

When a form template is used, the system opens a picklist with the HTML form templates defined for the workflow in question, after which the user can select the relevant form and upload it as a page.

Confidential

4.6.3 Delete the current document's last page

The user deletes pages in the document with the function by right click on the Document action (three dots)/Page available on document view



The system asks the user to verify the deletion.

The **Delete** button deletes the last page of the document.

The **Cancel** button closes the dialogue without deleting the last page.

4.6.4 Replace the current page with a new one

The user can replace an active page with a new page (a normal file or HTML form From template) with the button by right click on the Document action (three dots)/Page available on document view.

The system notifies the user that page x is being replaced (x = page number).

The user searches the replacing page with the **Choose File** button and replaces the current page with it with the **Upload** button. The old page will remain in the system and can be viewed as the previous revision of the page.

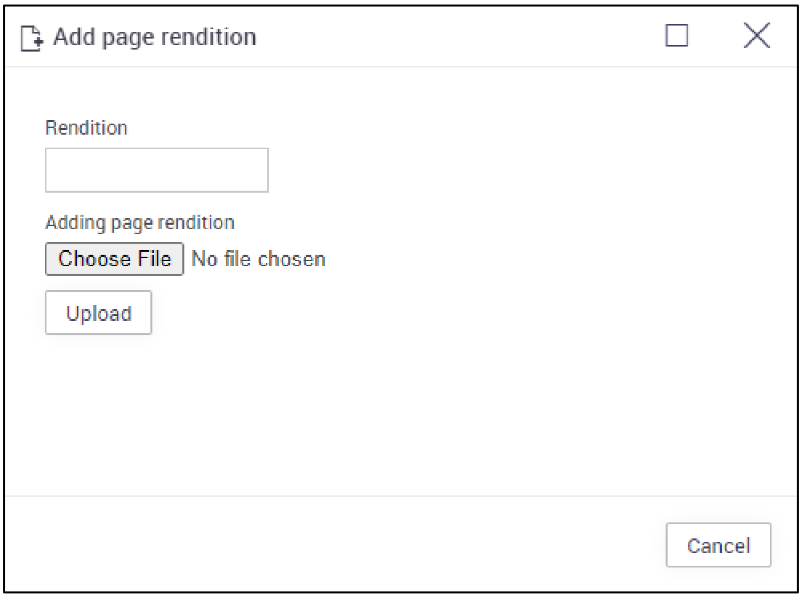
The **Cancel** button closes the dialogue without replacing the page.

The system notifies the user when the page has been replaced.

The user sets off the notification by clicking **OK**.

4.6.5 Add a new rendition to the Document page

A new rendition can be added to a document page or to a revision of a document page by right clicking on the Document action (three dots on the upper right corner of the window) / Rendition and selecting option (Add a new rendition to the page).



The system notifies the user that a new rendition will be added to the Document page or to the revision of the document page.

Information that descripes the format of the file to be uploaded is added to the field **Rendition**, e.g. pdf.

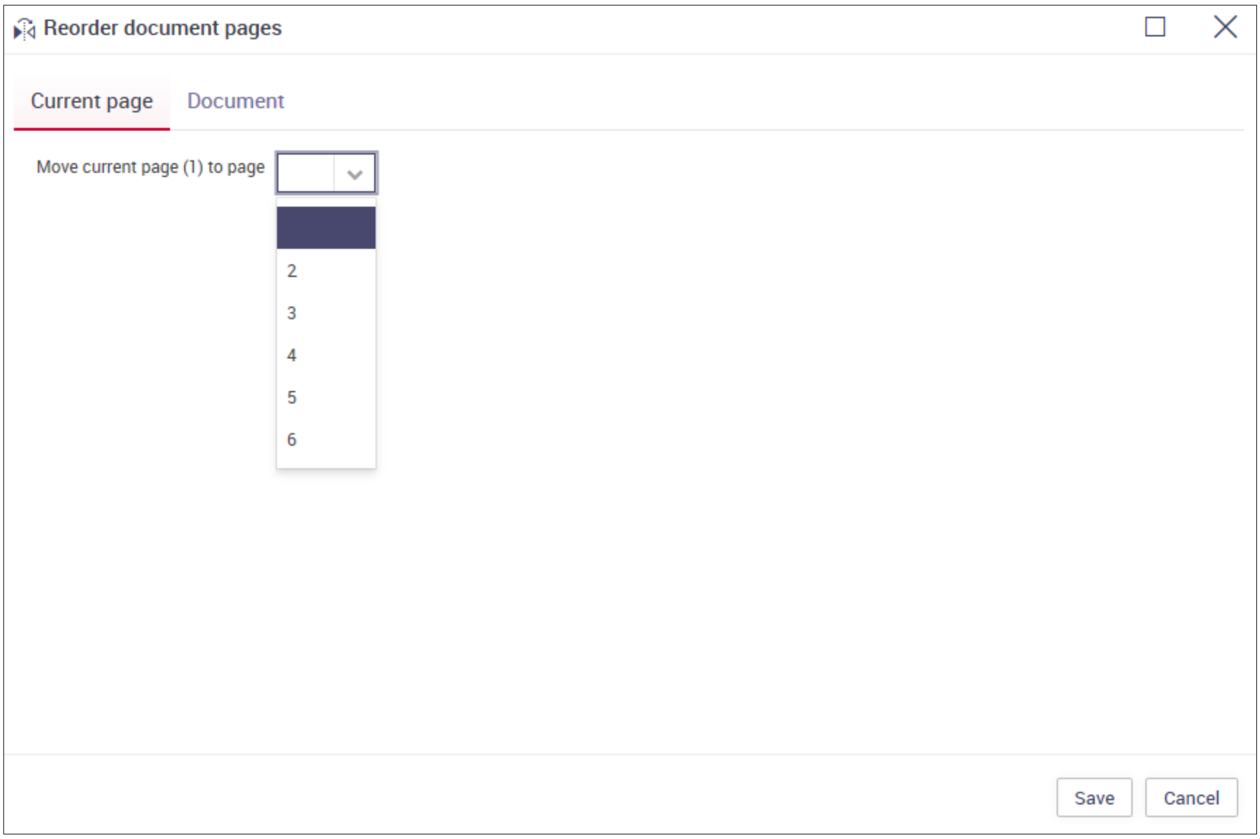
The rendition file to be added is browsed by using **Choose File** –button. The chosen file is uploaded as a new rendition by using **Upload** –button.

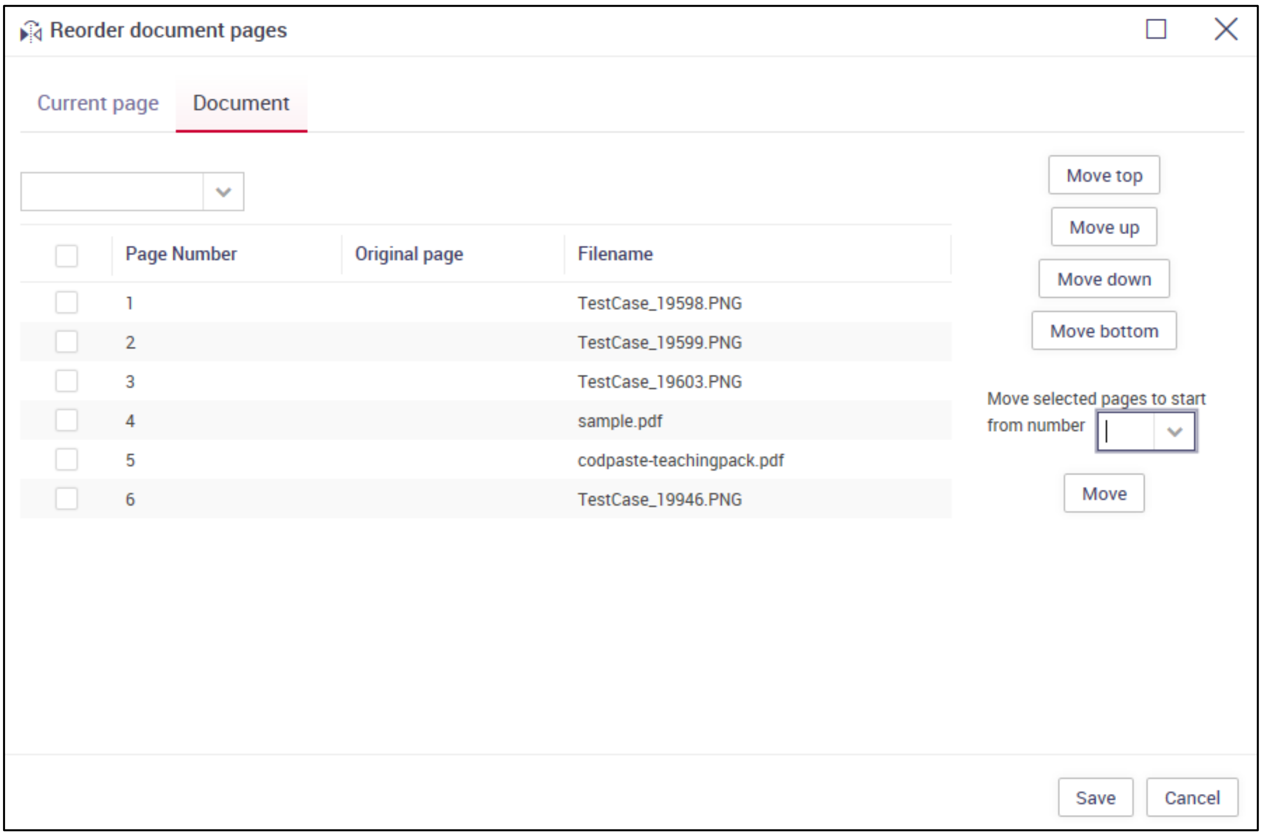
Once the new rendition has been uploaded it will be shown in the top bar, e.g:

Cancel -button closes the dialogue without uploading the new rendition.

4.6.6 Reorder document pages

The user can change document pages numbers with the button by right click on the Document action (three dots)/Page available on document view



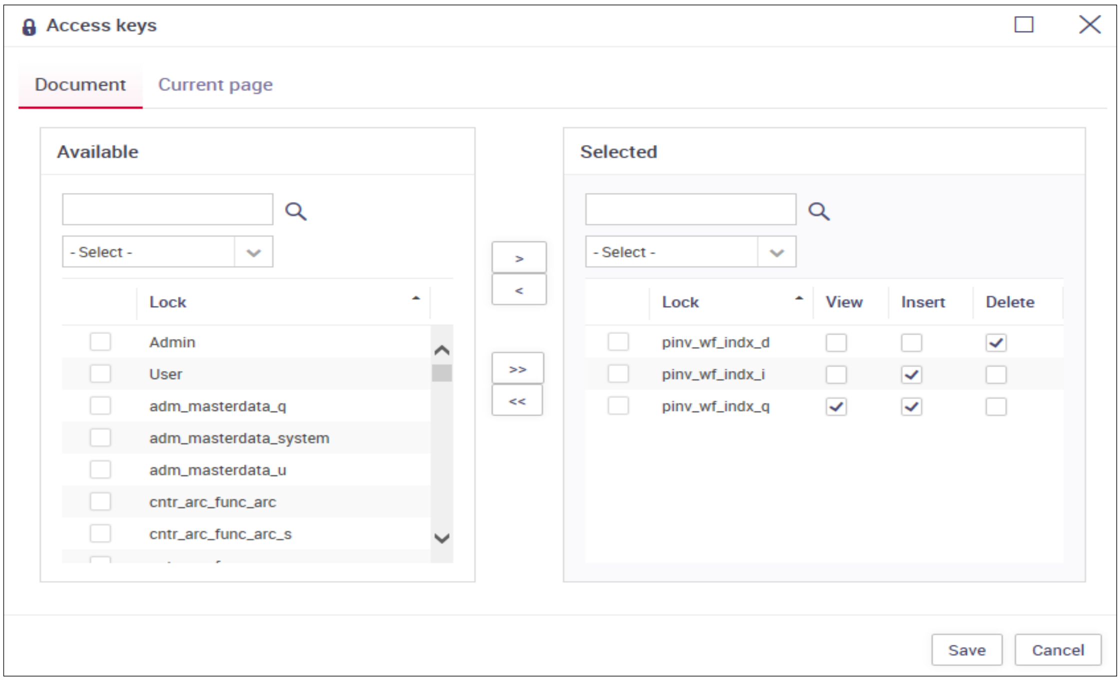


Confidential

4.6.7 Examine document access keys

The user can view and edit the access keys of the document and document pages in the window opening with **Examine document access keys** –button by right click on the Document action (three dots) available on document view

Usually you don't need to change the locks, as the locks are automatically set by application. Sometimes, though, it is not possible to set the locks automatically.



Access keys protecting the entire document are defined with the functions in the **Document** tab. Access keys protecting the current page are defined in the **Current page** tab.

In both cases the locks are defined per function:

Locks whose access key gives the user the right to view the document are defined in the **View** column.

Locks whose access key gives the user the right to add pages in the document are defined in the **Insert** column.

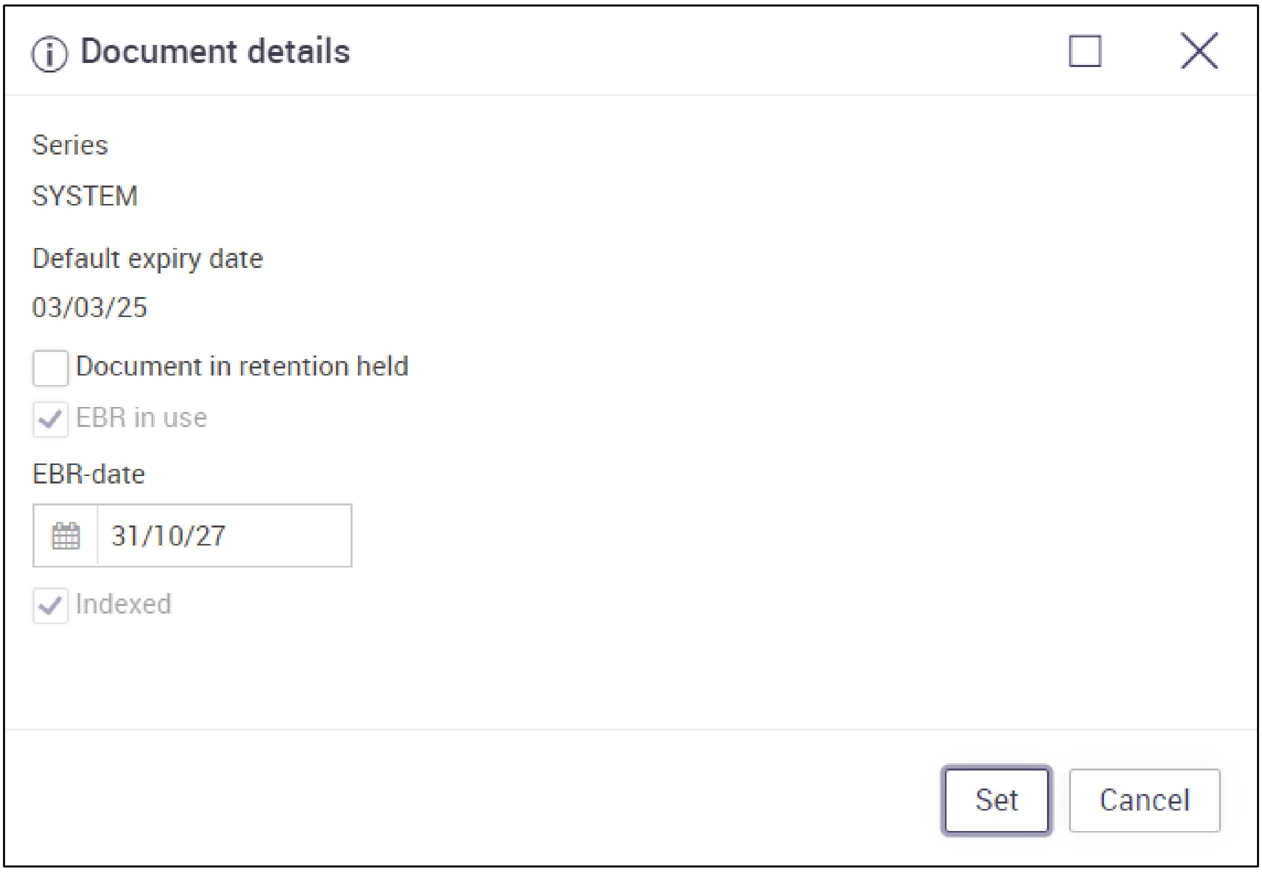
Locks whose access key gives the user the right to delete pages in the document are defined in the **Delete** column.

The **Save** button saves the changes made in the document's locks.

The **Cancel** button closes the access keys dialogue without saving the changes made.

4.6.8 Display the document details

A date after which a document can be deleted can be defined for documents in the archive. Usually this information is set automatically when document is brought to CGI DataCycle360 and they don't need to (or cannot) be changed. The user can view the document details with the button ⓘ by right click on then Document action (three dots) available on document view.



Series indicates the text series which the document belongs to in the archive.

Default expiry date indicates the date when the document expires and can be deleted completely.

Document in retention held indicates that the document can never be deleted.

When the user checks the **EBR in use** checkbox, he/she is able to enter the EBR date.

EBR date is the document's expiry date which can be earlier or later than the default expiry date.

Indexed checkbox indicates if the document is indexed. Checkbox is auto ticked if document is indexed. Checkbox is empty if document is not yet indexed. If field "Freetext indexing" is unchecked in index configuration for a particular index then field "Indexed" is not shown in "Show document details" Screen.

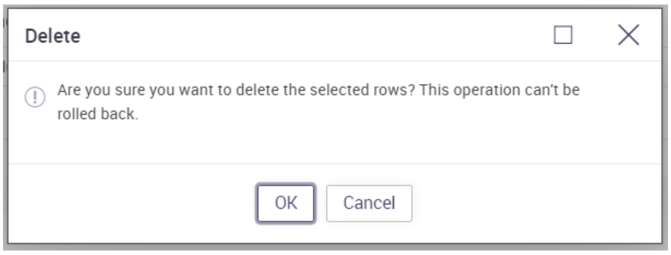
The information is saved with the **Set** button.

The **Cancel** button closes the dialogue without saving the information.

5 Document collection view

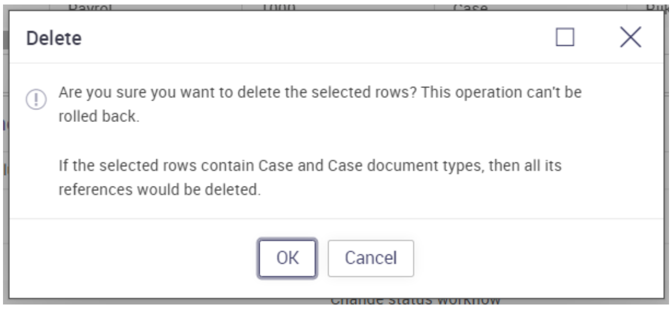
5.1 Document actions

Delete row(s)- deletes/removes the selected row/s from the document collection view.



On confirmation, the selected row/s are removed/deleted from the collection view.

If the selected row(s) is of type case or case document type, then system on confirmation will automatically remove/delete all its references as well.



6 General features

6.1 Document related functions

6.1.1 General

There are a few functions related to document handling in CGI DataCycle360 which are available for both workflow documents and archived documents.

Principle for printing operation is that the document can also be saved as a file instead of printing. This feature can be useful when e.g. more detailed control over the data selected for documents is needed.

The functions" **Send a for-your-information notice**" and" **Email the document**" are very similar to each other. Both are logically comparable to sending a copy, i.e. in case of workflow document the receiver is not a part of the document handling process and no action is expected of receiver. The main difference is that FYI function sends a document link as internal message and so the receiver has to be another CGI DataCycle360 –user. Sending document as per email is suitable for sending documents to non-CGI DataCycle360 –users.

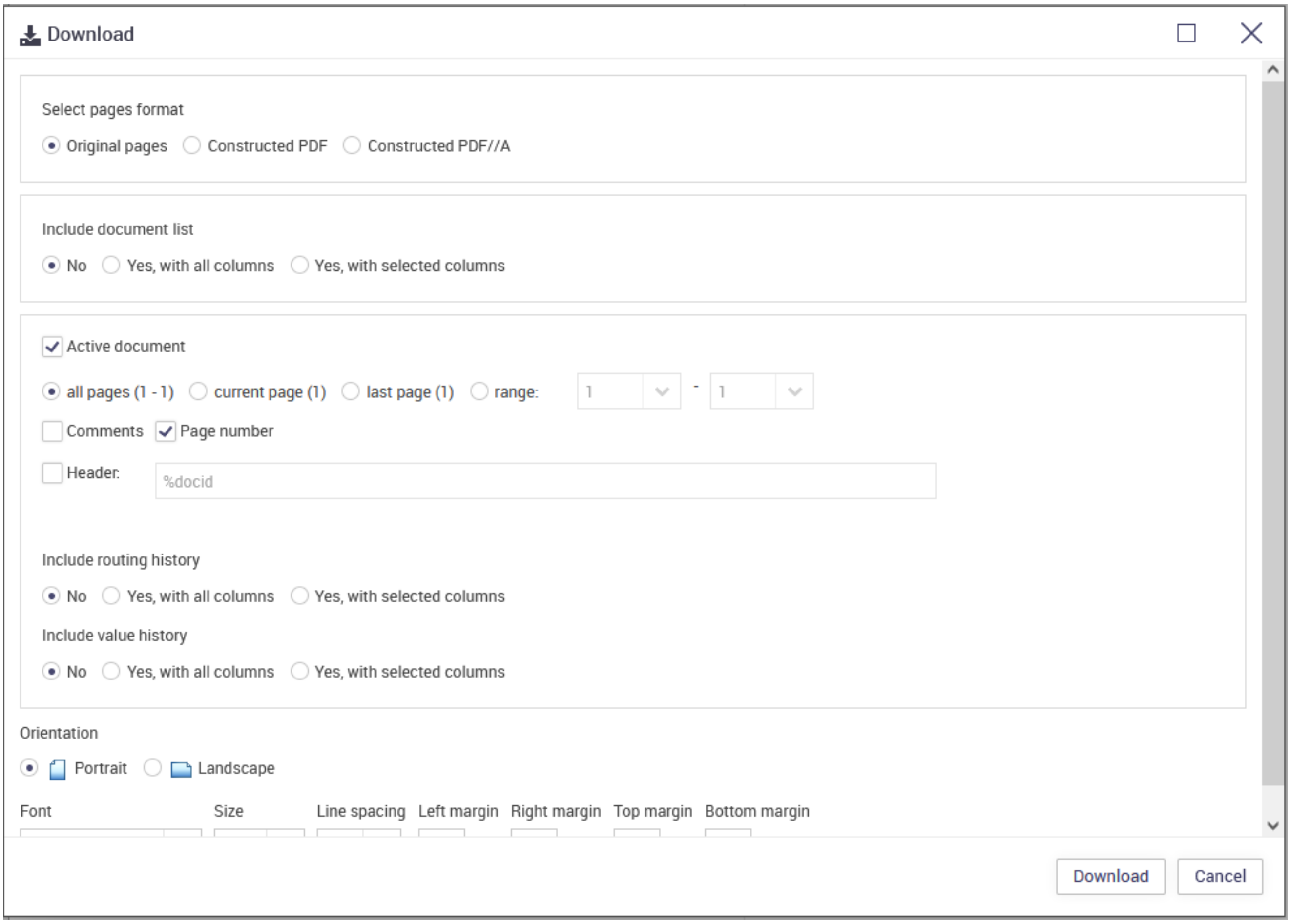
The user can "Send a for-your-information notice" and" Email the document" by right click on the Document action (three dots) available on document view.

6.1.2 Download the document

The user can download a document to his/her own PC with the **Save document to your computer** by right click on the Document action (three dots) available on document view. The function will open the **Download** dialogue where the user can provide the necessary information for saving. In case the user only wants to save the document list, it is recommended to use the **Export** –function instead. (see Export).

The way documents are processed varies depending on whether the system is configured to use asynchronous printing service. When configured, all constructed PDF download requests will be processed in the background by the print service, and the user will be notified of the completion via the message center at the top of the screen. The requested file can then be downloaded using the link provided in the notification message. Note that only workflow documents are handled in this way.

If printing service is not in use, then documents will be downloaded directly by the browser.



With the option **Original pages**, e.g. the original .tiff documents are saved.

Conversely, the pages are saved as converted PDF documents with **Constructed PDF** and **PDF/A** options. Note that PDF/A embeds fonts into the document, thus usually increasing the file size.

The user can save either the **Active document** or **Document list** in the file.

All pages (x-x) saves all pages of the active document. (Default)

Current page (x) saves the document's active page (x = page number).

Last page (x) saves the last page of the active document.

Selected pages of the active document are saved with the selection **Range**.

Checking the **Comments** checkbox means that the document's comments are saved in addition to the actual pages.

Only with **Constructed PDF** option:

- **Page number** numbered pages of the document. (Default)
- **Header** a name to the document pages can be assigned in the Header field
- The functions **Include rows**, **include routing history** and **Include value history**.

.

Orientation of the document can be set either as portrait or landscape.

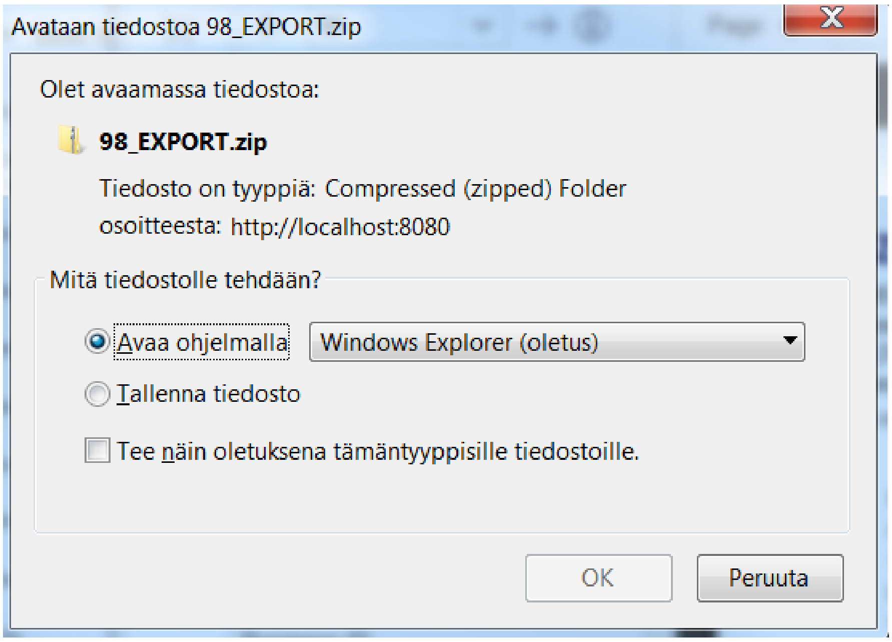
Font type, size and line spacing of the message are defined in the fields for **font**.

The **Download** button saves the document or the document list and initiates the download process.

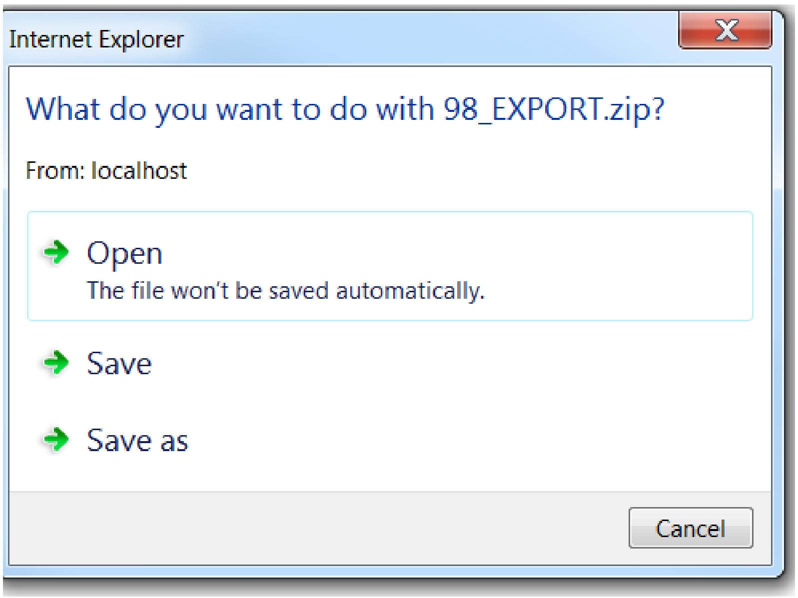
The **Cancel** button closes the dialogue without saving the document.

Download –button stars exporting the document. From the selected data CGI DataCycle360 creates a zip –file handling of which is dependent on browser settings. Normally the browser either asks what is to be done with the document or saves the document to default location.

With Mozilla, the location for downloading the file is confirmed with the following notification:



With IE10, the location for downloading the file is confirmed with the following notification:



6.1.3 Print the document

6.1.3.1 Operating principle

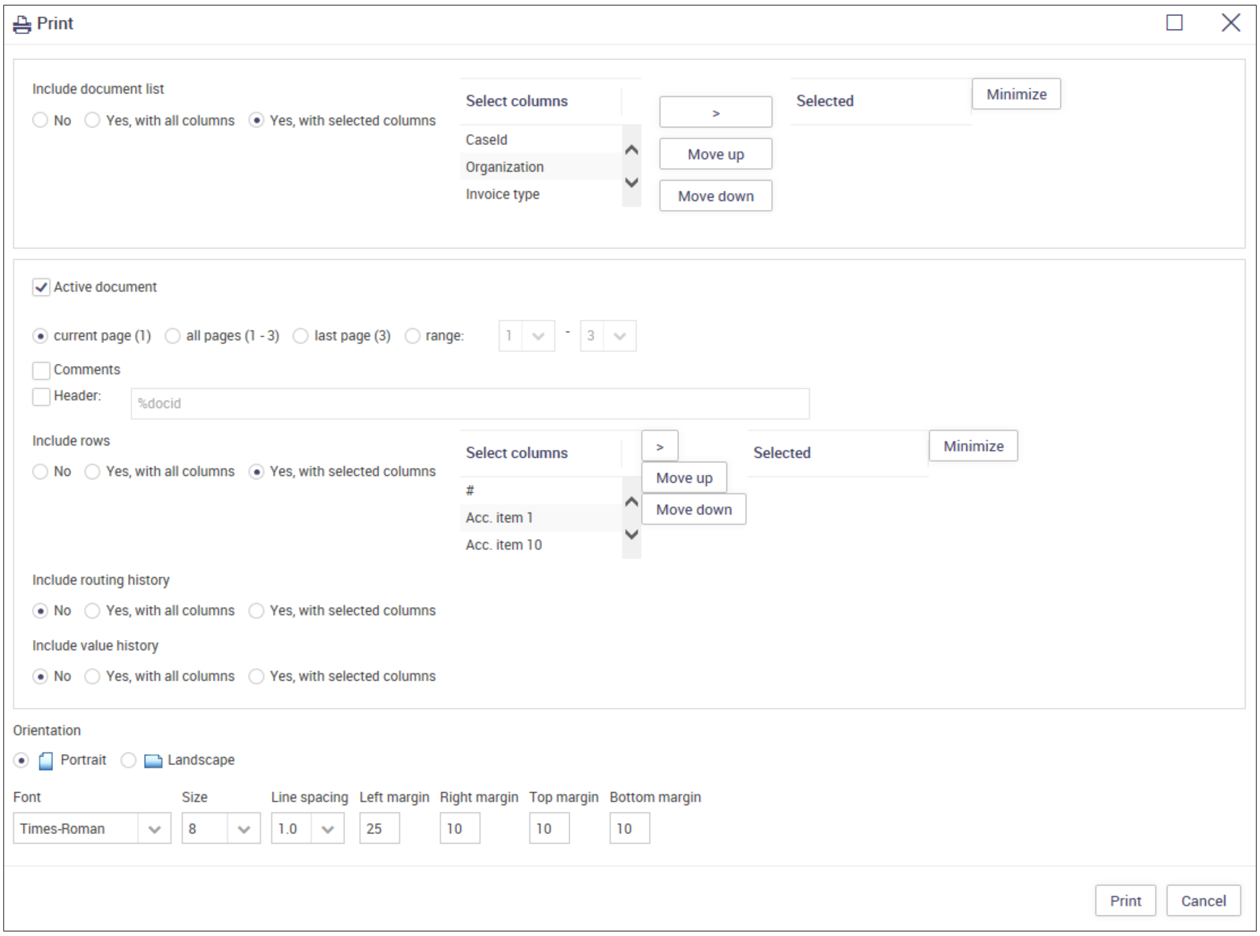
With the CGI DataCycle360 **print** –function it is possible to print the document and the selected data on paper. The print -function consists of two steps:

1. The data to be printed is selected. CGI DataCycle360 creates a PDF –document for printing.
2. Printer is selected.

This function doesn't print the files in **HTML format**; they are printed with the **Print -**function available by clicking the right button of the mouse.

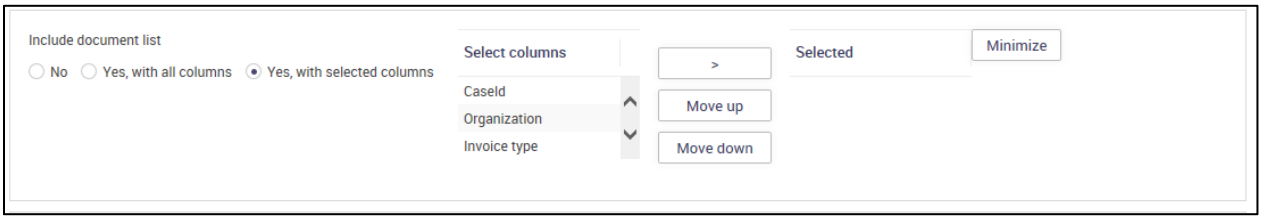
6.1.3.2 Defining the contents to be printed

When the user clicks the **Print document and/or comments** button, by right click on the Document action (three dots) available on document view the system will open a dialogue where the user can provide the information needed in printing the document. The printing function turns the document into a PDF file which can be printed.



The user can include a **Document list** in the printout according to the search result. When the user checks the radio button **No**, the list will not be included. When the user checks the radio button **Yes, with all columns**, the document list will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before sending it and leave out columns.

With the latter selection, **Select columns** will be displayed.



The user selects the desired columns from the framework in the left and moves them to the **Selected** framework with the arrow key 

. The order of the selected columns can be changed with **Move up** and **Move down** buttons. Columns can be deleted from the framework with the Delete function available by clicking the right button of the mouse. The user can hide **Select columns** with the **Minimize** button and make it visible again with the **Display select columns** button.

Definitions provided after selecting the option **Active document** concern the active document.

The user can print all pages in the document by selecting **All pages (x-x)**. (Default)

Confidential

The user can print the document's active page by selecting **Current page (x)** (x = page number).

The user can print the document's last page by selecting **Last page (x)**.

The selected pages of the active document are printed with the selection **Range**.

Checking the **Comments** checkbox means that the document's comments are also printed.

With the selection **Page number** pages of the document are numbered. (Default)

A name for the printout can be assigned in the **Header** field. By default the field's value is **%docid** , when the option is activated the document header contains doc id.

Orientation of the printout can be set either as portrait or landscape.

The document's postings can be printed by selecting the function **Include rows**. When the user checks the radio button **No**, the list will not be included. When the user checks the radio button **Yes, with all columns**, the postings will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before printing it and leave out columns. **Selecting columns** is a similar process as with the document list.

The user can print the document's routing history by selecting **Include routing history**. When the user checks the radio button **No**, the list will not be included. When the user checks the radio button **Yes, with all columns**, routing history will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before printing it and leave out columns. **Selecting columns** is a similar process as with the document list.

The user can print the document's value history by selecting **Include value history**. When the user checks the radio button **No**, the list will not be included. When the user checks the radio button **Yes, with all columns**, the value history will be printed as such. When the user checks the radio button **Yes, with selected columns**, he/she can edit the list before printing it and leave out columns. **Selecting columns** is a similar process as with the document list.

Font type, size and line spacing of the printout are defined in the fields for **font**.

6.1.3.3 Print

The **Print** function generates a .pdf file according to the definitions described above, and the system will open the file in a new browser window/tab (depending on the browser configuration) where the user can print the information.

The **Cancel** button closes the dialogue without printing the material.

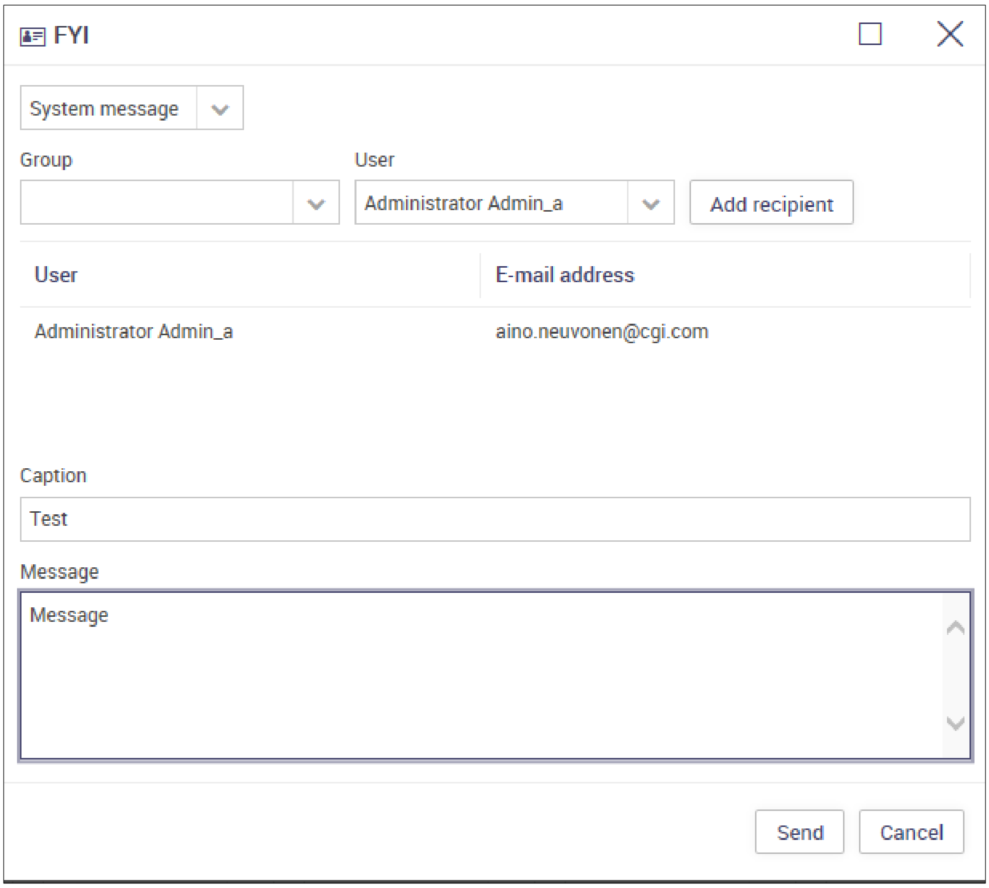
The print functionality is only for Workflow. Printing in archive check section 5.2.6

6.1.4 Send the document 'For your information'

The user can send the document to a user group or a user (FYI) with the button by right click on the Document action (three dots) available on document view The document can be sent either by e-mail or as a system message.

The FYI option is available in Workflow, Archive and Sales Invoicing.

Documents sent for-your-information can be viewed from the top right corner function **Messages**.



When selecting **E-mail** as the delivery method, the document is sent by e-mail.

Default manner of delivery is system message. FYI-messages can be set to be send by email as default.

The e-mail contains a direct link to the document, which takes the user to the CGI DataCycle360 login dialogue. After the user has entered a user name and a password, he/she is able to access the sent document. The format of the message is as follows:

CGI DataCycle360 document 107 has been sent to you FYI

http://localhost:8080/rondor8-gui?instanceIdentifier=main&targetType=workflow&targetIdentifier=WD1&caseId=107

Confidential

More information: from routed documents

Sender:

Admin Administrator

rondo.admin@cgi.com

When the message is sent as a **System message**, the message title is displayed in the red area on the user's home page, which is reserved for system messages and also **in the red area** on that module where FYI message is created.

The user group, which the recipient belongs to, is selected in the **Group** picklist.

The user(s) to whom the document is sent FYI is selected in the **User** picklist. The user is transferred to the framework below the picklists with the **Add recipient** button.

The **Caption** field contains the message title which is displayed e.g. on the recipient's home page.

The actual message to the user is entered in the **Message** text area.

The **Send** button saves the message and sends it to the recipient.

The **Cancel** button closes the FYI dialogue without sending the message.

6.1.5 Email the document

6.1.5.1 Operating principle

The user can send the document by e-mail with the  button by right click on the Document action (three dots) available on document view.

Functionality is basically the same as when saving document as a file or when sending it separately as e-mail. Like in print –function there are two faces:

1. The data is selected. CGI DataCycle360 creates a PDF –document for printing.
2. The message is written.

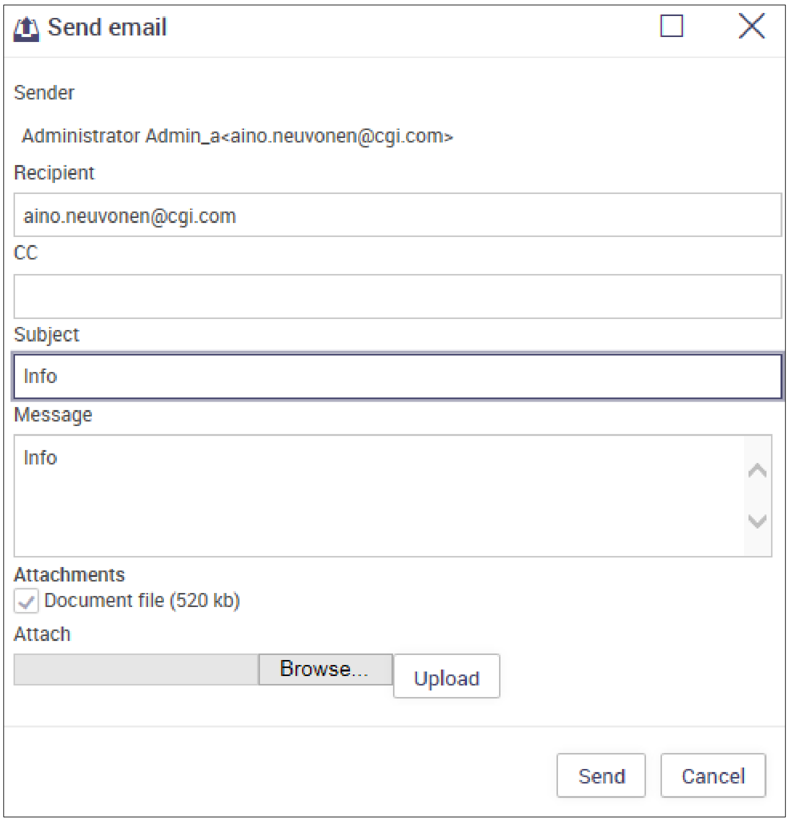
6.1.5.2 Selecting the data to be sent

The function is identical to print –function. The purpose of the selections is explained in section “Explaining the purpose of the selections”.

Send emil opens a window in which the receiver is selected.

6.1.5.3 Adding a message

When the user clicks the **Send email** button, the system will open a dialogue where the recipient is selected.



The **Sender** field will automatically contain the information of the active user - user's last name, first name and email address. The e-mail address can be either the user's own e-mail address or CGI DataCycle360's default e-mail address, depending on the environment.

The user enters the recipient's e-mail address in the **Recipient** field.

CC will contain those users to whom the document is sent in addition to the recipient.

The user can provide a name for the e-mail in the **Subject** field.

The message to the recipient is entered in the **Message** text area.

The user can add attachments to the document in the **Attachments** section. The attachment is searched with the **Browse** button and attached to the e-mail with the **Attach** button.

The **Send** button will send the document to the selected recipient.

The **Cancel** button closes the dialogue without sending the document.

6.2 Functions for handling the document list

6.2.1 General

Following general functions affect the rows of the search result list instead of a single document.

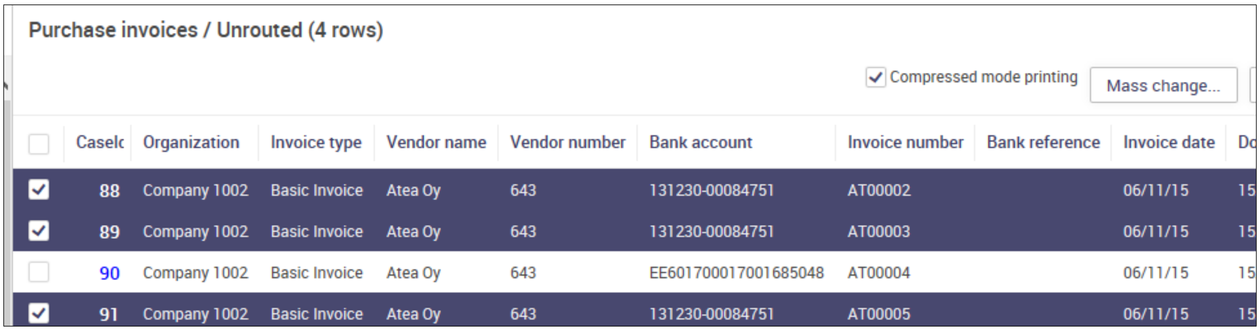
With **Export** –function you can transfer data from CGI DataCycle360 to e.g. Excel. The feature is used a lot to reporting, especially when information from CGI DataCycle360 needs to be integrated with information from other applications.

Report and **graph** features are optional and available for extra fee, so they are not active in every environment.

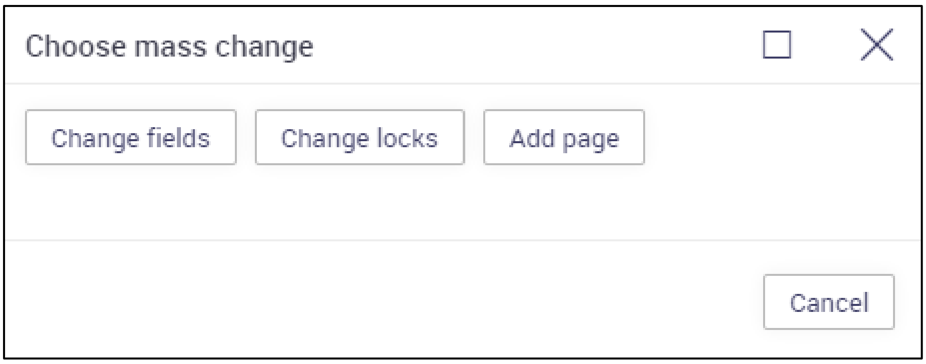
6.2.2 Mass change

6.2.2.1 General

The user can perform the same action for several documents at the same time by checking the checkboxes in front of the documents in the document list. This way the action to be performed will apply to all selected documents.



The **Mass change** function above the document list opens a dialogue where the user can selects **Change fields, Change locks** or **Add page.**



Depending on the user's selection, the system will open a dialogue where header, lock informationor new page will be provided to all documents selected in the document list.

6.2.2.2 Change fields

There are a few settings at the top of the Mass change -window which define if certain validations are performed when data is changed. Usually it is useful to keep the validations set on. In case only some of the document data is changed (common data for imported documents) and the document specific data is entered separately for each document, validations need to be set off in order to save the given incomplete data.

The user selects the fields he/she wants to update by checking the checkbox in front of each field. If the field contains a value but its checkbox hasn't been checked, the value won't be saved in the documents. If the checkbox is checked but the field doesn't contain a value, an empty value will be saved in the documents in the field in question.

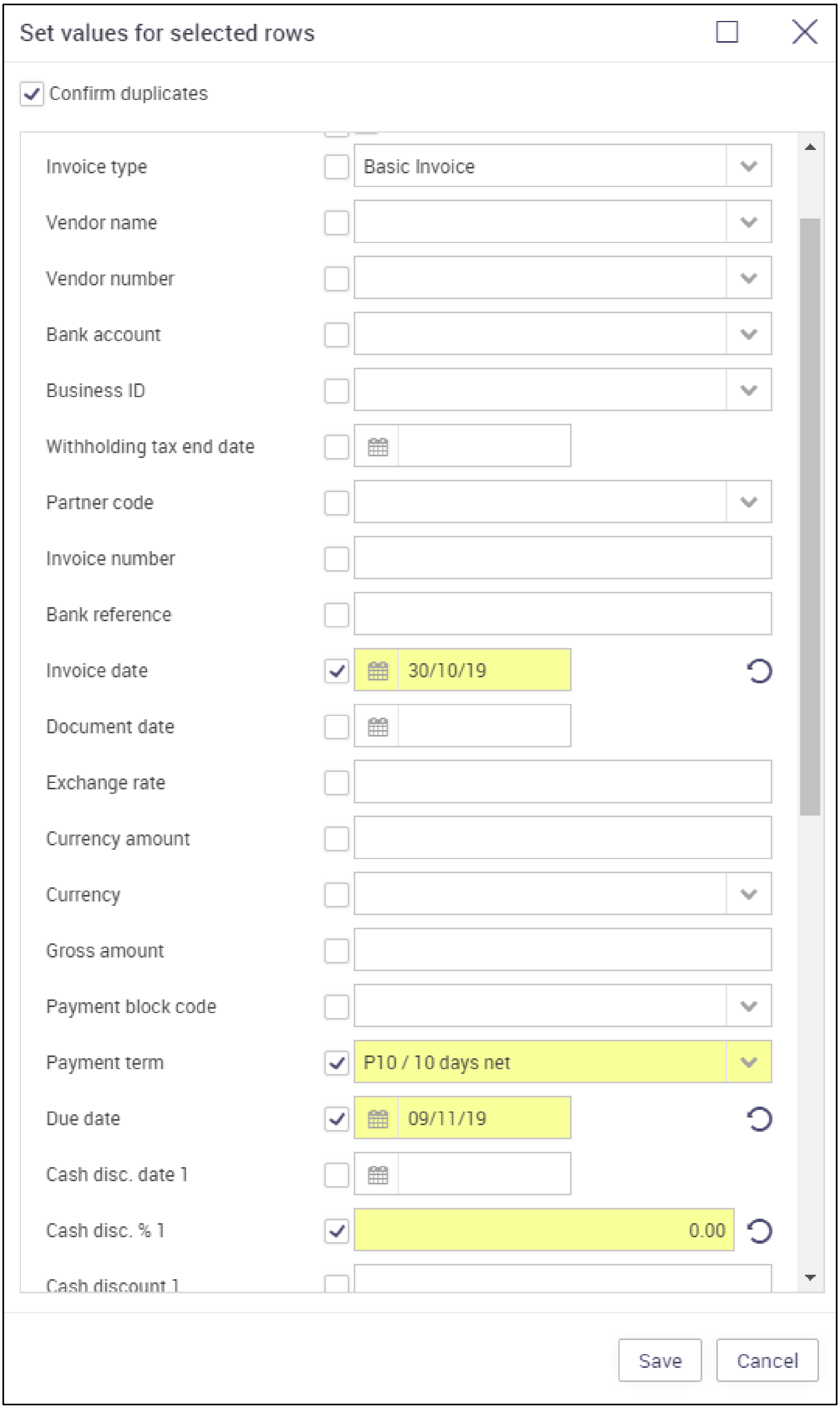
When the user selects **Confirm duplicates**, the system will check that documents with the same information haven't been saved in the system before on the basis of duplicate confirmation settings.

The system checks that the provided values are in accordance with field specifications and values are in accordance with defined rules and authorisations.

The **Save** function will take the information provided in the selected fields to all documents that were selected in the list.

The **Cancel** button closes the dialogue for mass changing without saving the provided information.

In the example below, the following information is provided for the documents: Invoice date, Payment term and Due date.



Confidential

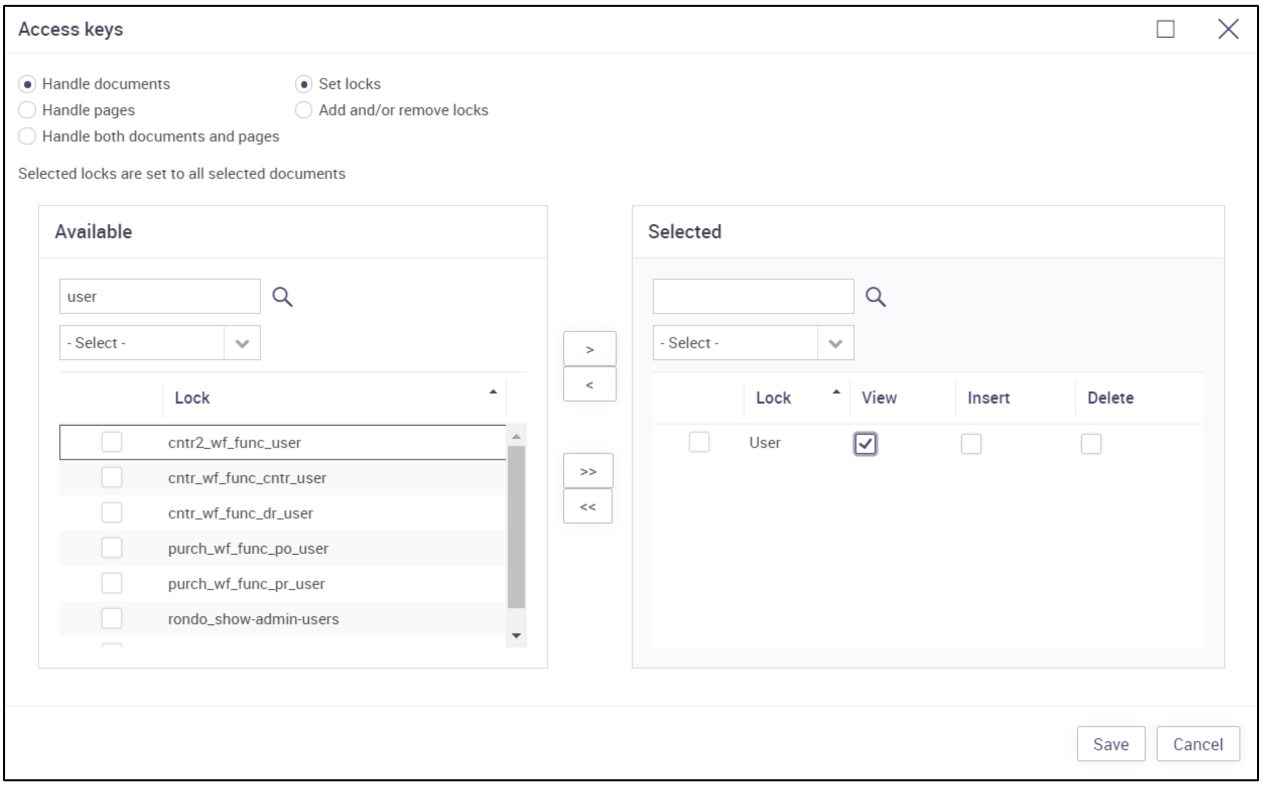
6.2.2.3 Change locks

In the example below, the user will **Set locks to documents**.

When the user selects **Handle documents**, the selected locks are only set to documents, not pages.

When the user selects **Handle pages**, the selected locks are only set to document pages, not documents.

When the user selects **Handle both documents and pages**, the selected locks are set both to document pages and documents.



The user selects locks that will be set in the **Available** framework on the left and transfers them to the **Selected** framework with arrow keys > . The selected lock can be removed with <

Several locks can be transferred at the same time with double arrow buttons >> and << .

The access key settings are saved with the **Save** button.

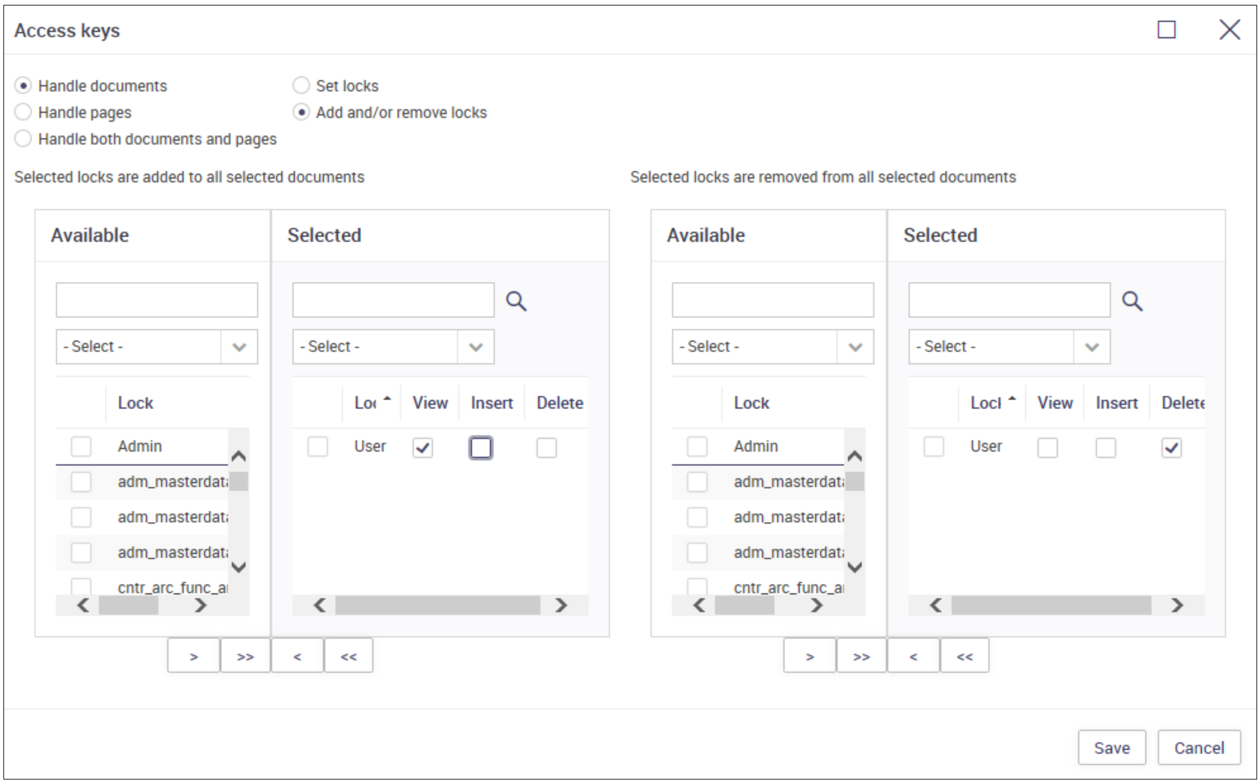
The **Cancel** button closes the dialogue without saving the changes.

In the example below, the user will **Add and/or remove locks**.

When the user selects **Handle documents**, the selected locks are only added to / removed from documents, not pages.

When the user selects **Handle pages**, the selected locks are only added to / removed from document pages, not documents.

When the user selects **Handle both documents and pages**, the selected locks are added to / removed from both document pages and documents.



The user defines locks to be added to selected documents in the framework on the left with arrow keys.

Locks to be removed from selected documents are defined in the framework on the right with arrow keys.

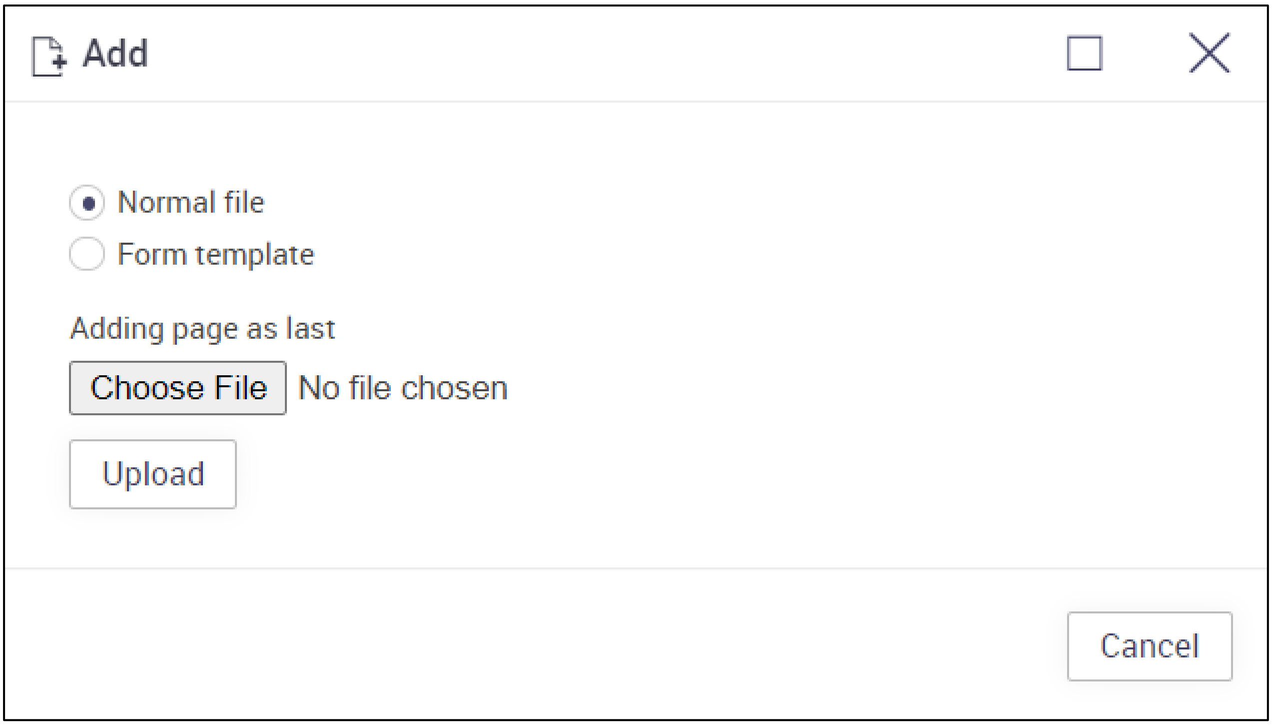
Using arrow keys is described in the section for setting locks.

6.2.2.4 Add page

The user adds new page to the selected documents with Mass change/ Add page function The new page is added as the last page in the documents.

The user searches the document to be added with the **Choose File** button and adds it with the **Upload** button.

The **Cancel** button closes the dialogue without adding a new page.

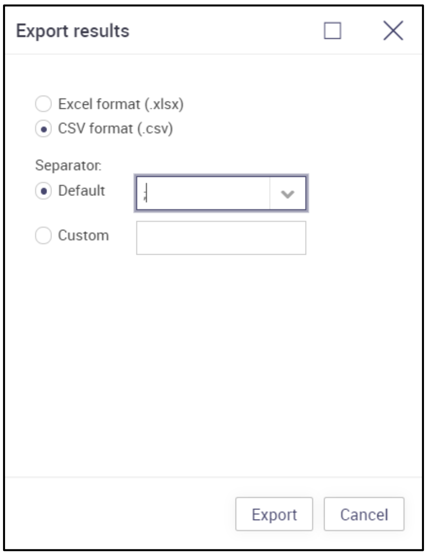


The page to be added can either be a normal page or an HTML Form set in the system.

When a form template is used, the system opens a picklist with the HTML form templates defined for the workflow in question, after which the user can select the relevant form and upload it as a page.

6.2.3 Export

The user can save the search result as an **Excel** (.xlsx) or **CSV** file by clicking the **Export** button above the document list.



The search result can be modified and the changes saved e.g. in Excel.

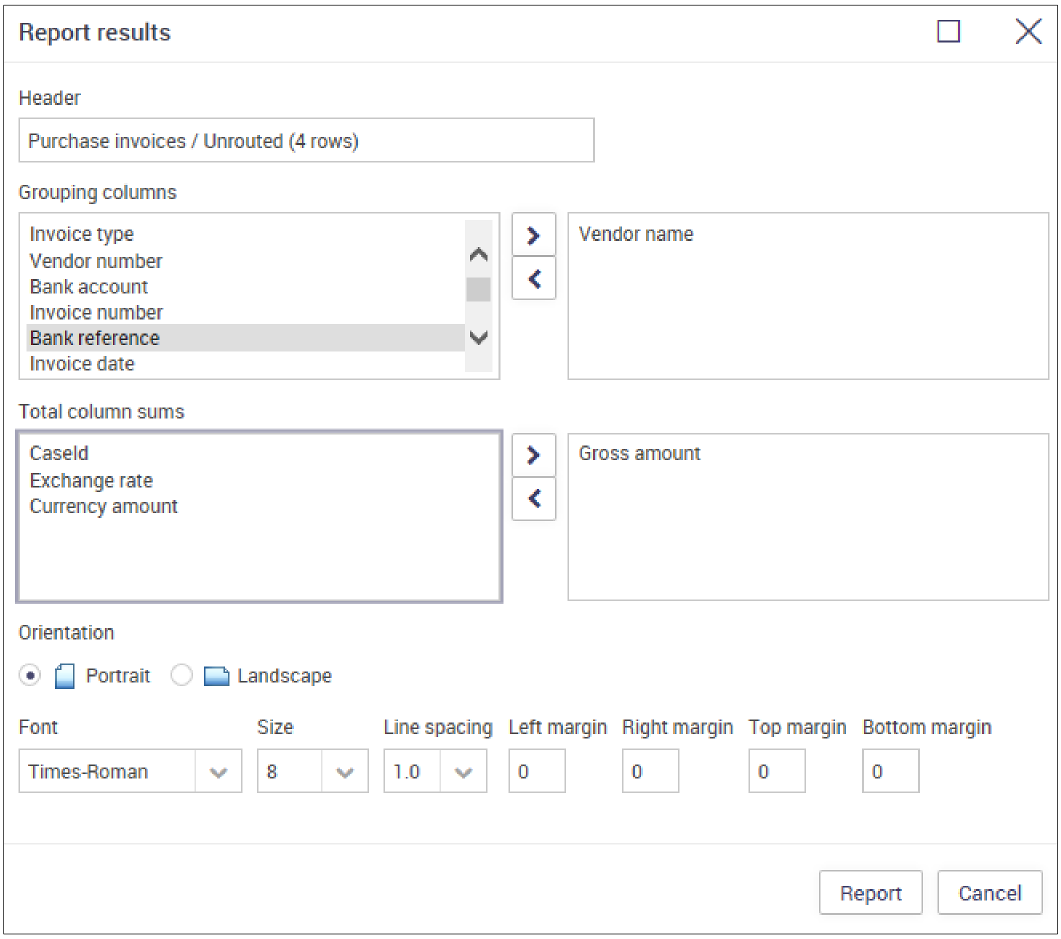
If the user selects the CVS format, the separator must also be provided.

6.2.4 Report

A PDF –report can be created, saved and printed from whichever result set when the report option is in use.

The user can generate a report of the query result. The **Report** function opens the dialogue for defining the report.

Confidential



Grouping column(s) and **Total column sums** are defined for the report.

Orientation of the report printout can be set either as portrait or landscape.

Font, Size and Line spacing used in the report are also defined in the section for **font**.

The report is generated by clicking the **Report** button.

A PDF report is generated with the **Report** button. An example of a report is presented below:

Purchase invoices / Unrouted (4 rows) 26/09/18 11:59:07.536 Page 1

CaseId	Organization	Invoice type	Vendor name	Vendor number	Bank account		Invoice number
Bank reference	Invoice date	Document date	Currency	Exchange rate	Currency amount	Gross amount	Payment term
Due date	Your reference	Contract number	Site	Contact person	Description	Cancel code	Status
Created by							
Grouping columns	Vendor name						
Cnt:4	Atea Oy						
88	Company 1002	Basic Invoice	Atea Oy	643	131230-00084751		AT00002
	06/11/15	15/08/18	EUR	-	-	1,672.26	P14
20/11/15		-			Atea Oy	-	UNROUTED
User Link 15/08/18 12:00:40.037							
89	Company 1002	Basic Invoice		643	131230-00084751		AT00003
	06/11/15	15/08/18	EUR	-	-	974.76	P14
20/11/15		-			Atea Oy	-	UNROUTED
User Link 15/08/18 12:00:41.045							
90	Company 1002	Basic Invoice		643	EE601700017001685048		AT00004
	06/11/15	15/08/18	EUR	-	-	5,679.21	P14
20/11/15		-	12	amn	Atea Oy	-	UNROUTED
User Link 15/08/18 12:00:41.893							
91	Company 1002	Basic Invoice		643	131230-00084751		AT00005
	06/11/15	15/08/18	EUR	-	-	807.24	P14
20/11/15		-			Atea Oy	-	UNROUTED
User Link 15/08/18 12:00:42.670							
Total	Gross amount 9,133.47						
Total	Gross amount 9,133.47						

(Font is Times Romana)

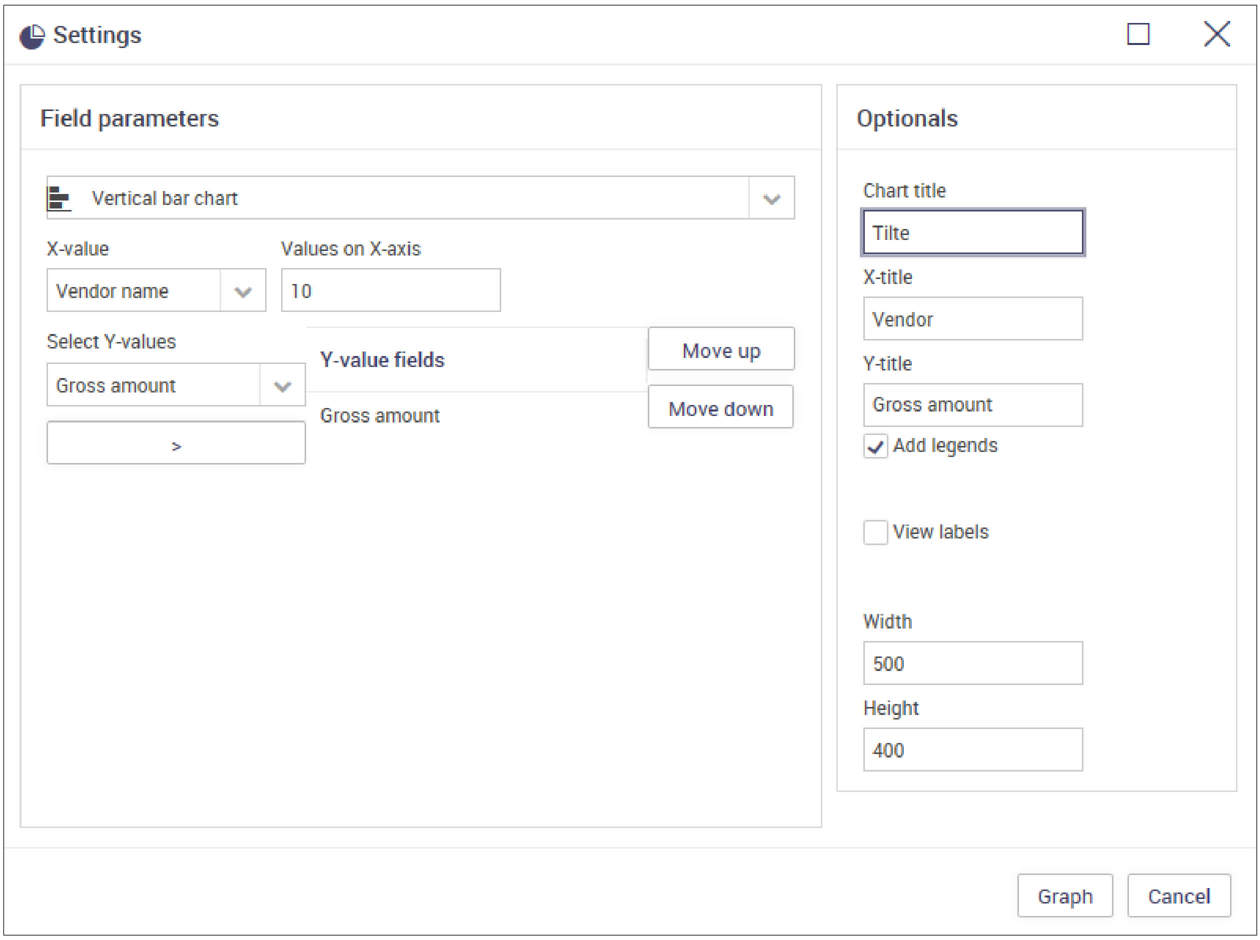
6.2.5 Graph

A Graph can be created from whichever result set when the graph option is in use.

The user can define a graphic presentation of the search result in the dialogue available by clicking the **Graph** button above the document list.

The user defines **X value** (e.g. vendor’s number) and **Y value** (e.g. gross amount) for the designed chart in the **Field parameters** section.

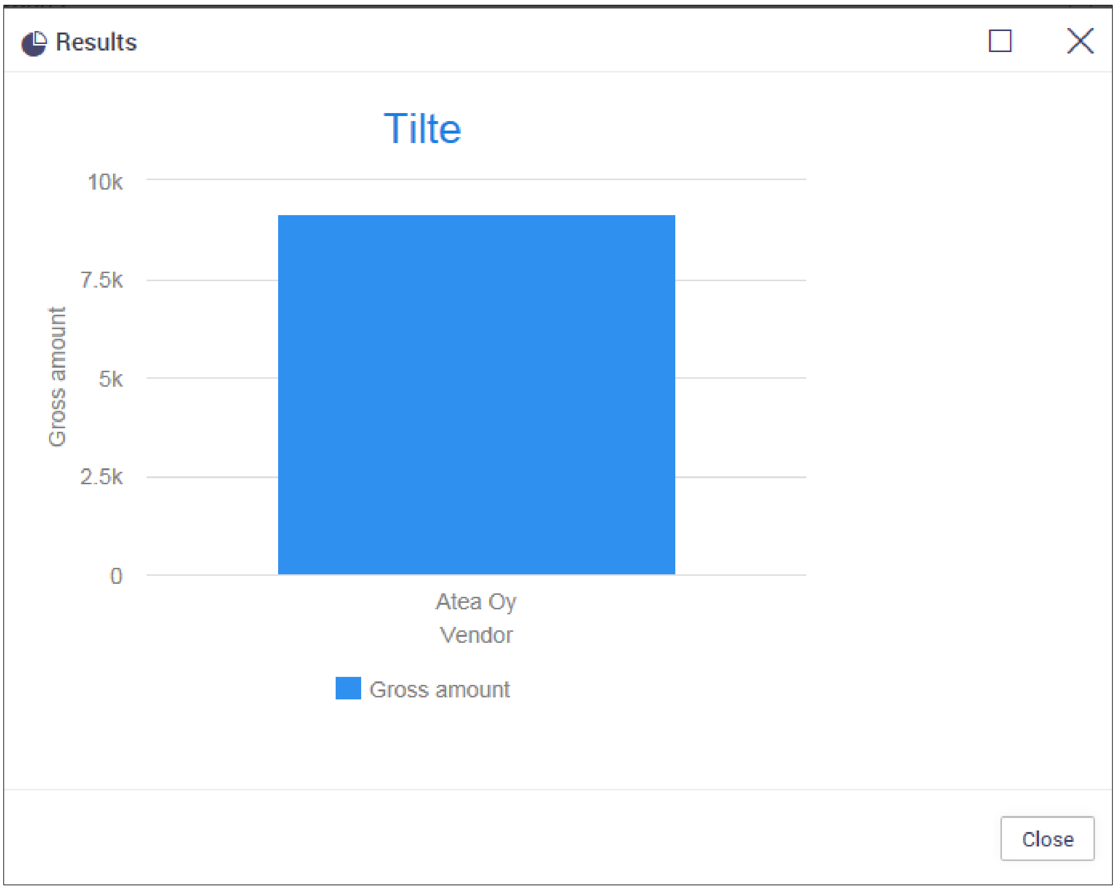
In the **Optionals** section, the user can provide additional specifications for the chart: **Chart title, X title** and **Y title** and define the size of the chart.



The system generates the graphics according to the given specifications with the **Graph** function.

The **Cancel** button closes the graph settings dialogue without generating the graph.

Below there's an example of a graph generated according to the specifications provided above:


Results
Tilte
10k
7.5k
5k
2.5k
0
Gross amount
Atea Oy
Vendor
Gross amount
Close

6.2.6 Print

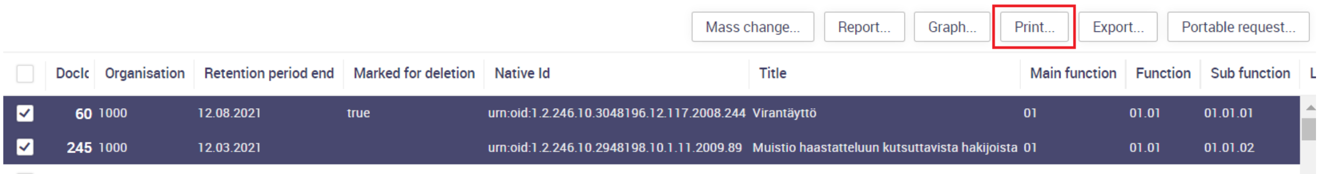
With another CGI DataCycle360 **Print** function it is possible to print the list of documents and the selected data to a single PDF file.

This function is applicable only for Archive. For Workflow refer to section 5.1.3.3 Print.

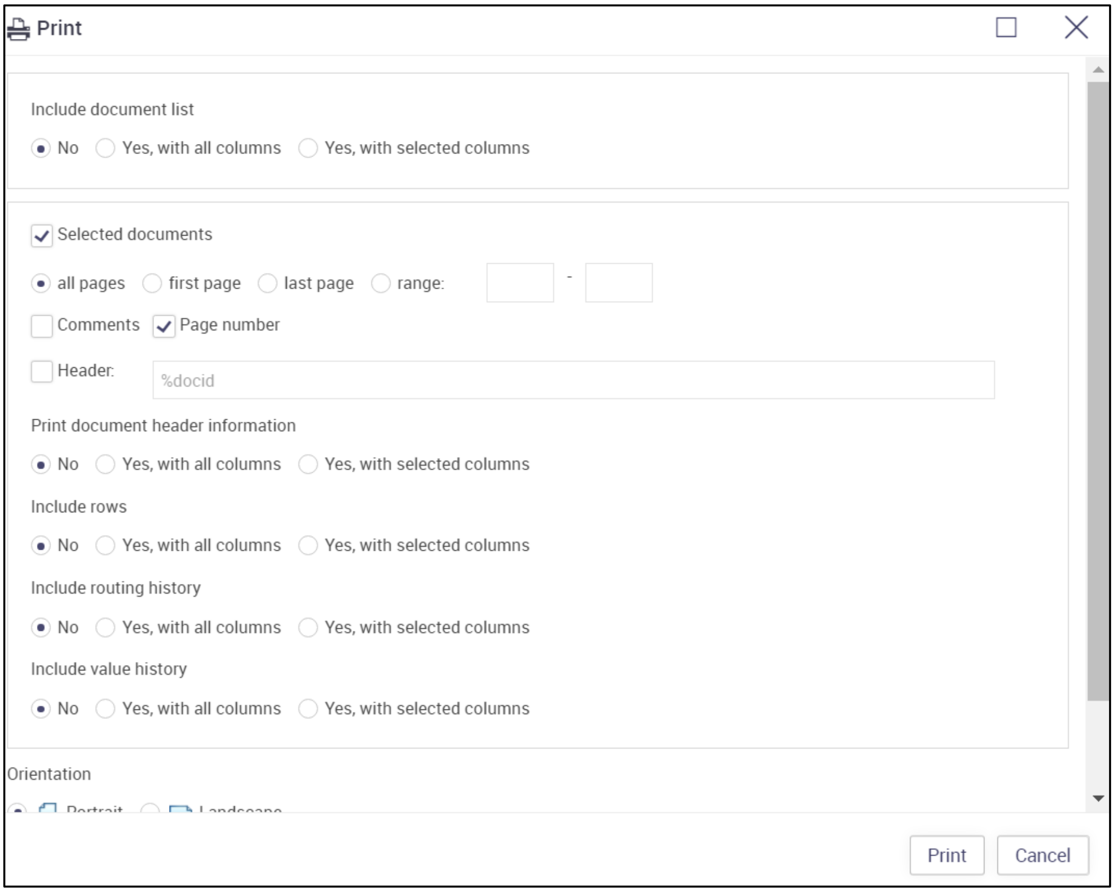
You can request to print list of documents and the selected data to a single PDF file. System will prepare the print file and once ready will trigger a user message.

The print function consists of three steps:

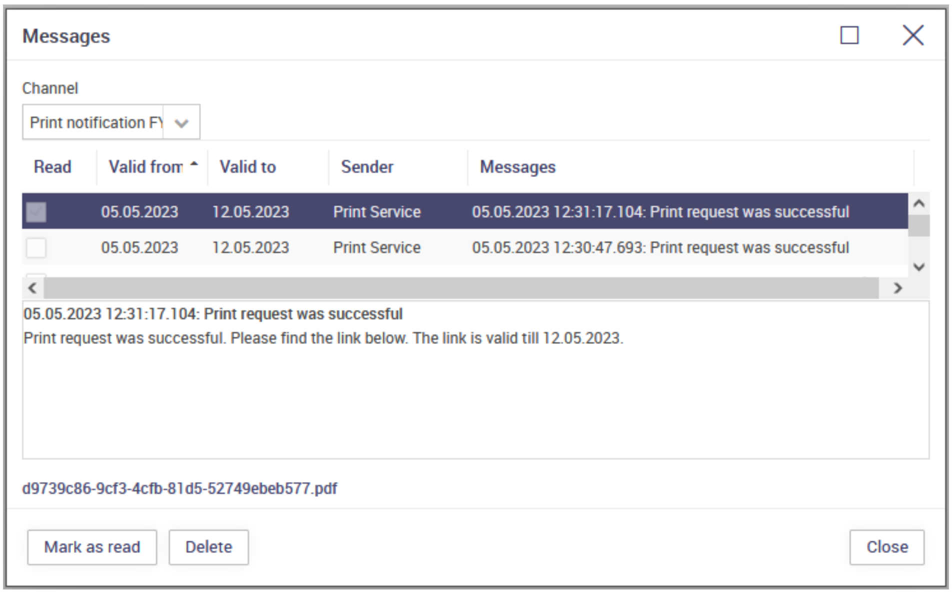
1. Select the document/s that you would like to print



2. Add any additional information you would like within the print file & choose print

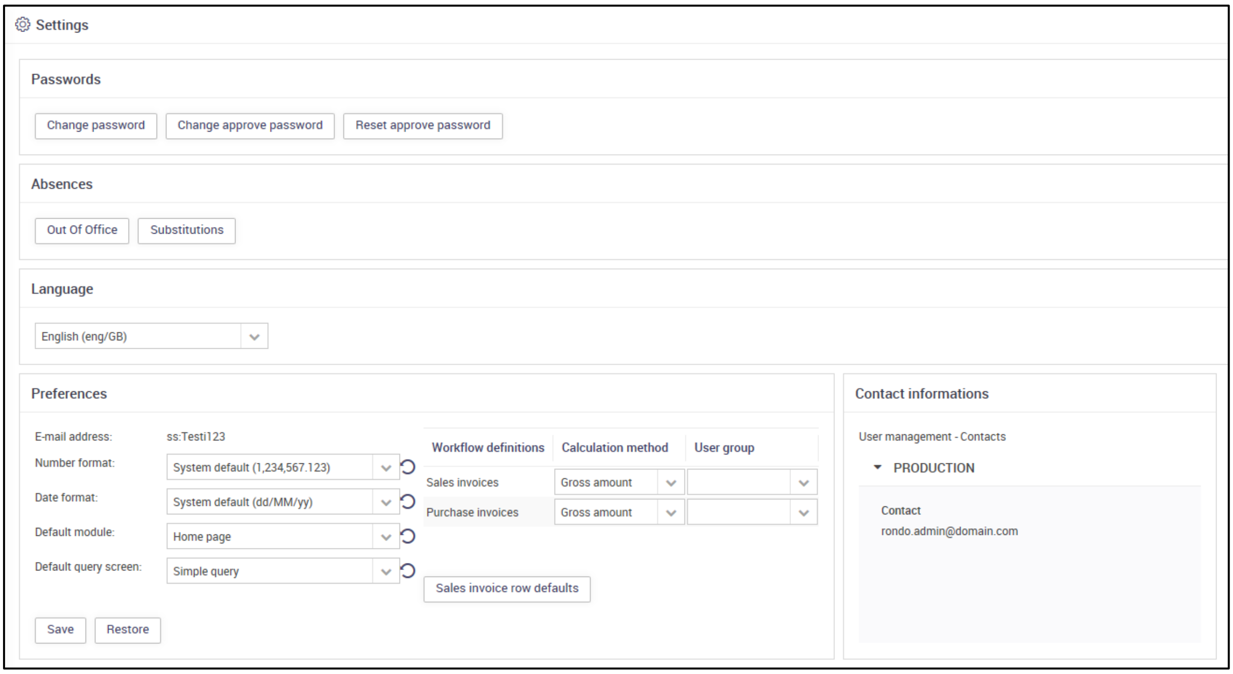


3. Print status can be viewed from the top right corner function **Messages**
   Select ' Print notification FYI.' from Channel.
4. User can download the PDF generated by using the link in the message


Messages
Channel
Print notification F\
Read
Valid from
Valid to
Sender
Messages
05.05.2023
12.05.2023
Print Service
05.05.2023 12:31:17.104: Print request was successful
05.05.2023
12.05.2023
Print Service
05.05.2023 12:30:47.693: Print request was successful
05.05.2023 12:31:17.104: Print request was successful
Print request was successful. Please find the link below. The link is valid till 12.05.2023.
d9739c86-9cf3-4cfb-81d5-52749ebeb577.pdf
Mark as read
Delete
Close

7 Settings

The **Settings** –module is for the user to change her/his personal settings, change the password and approval password and enter the absences.



The default language of the user is visible in **Language** –frame. The language can be changed during CGI DataCycle360 session e.g. from Finnish to English, and logout is not necessary. The same language setting can be defined in login window when signing in.

The **E-mail address** –field shows the address defined to the user with Admin/Access control/Users -function.

From **Number format** –pick list the user can choose the notation for number values and the number of decimals.

Date format –pick list shows the selection of notations for dates.

The **Default** module selected is opened automatically when the user logs in CGI DataCycle360 (Home Page, Archive, Workflow, Admin, Link, ROP, Invoicing, Analytics, Dashboard, or Help). The modules, for which the user has authorizations to, are available. The selection can also be made on homepage by clicking **Go to this section automatically when I log in**.

Default query screen selected from the pick list is opened automatically in archive (either Simple or Advanced query). The simple query is recommended as it is faster to use than the advanced query.

In the frame **Workflow definition/Calculation method/User group** the user can select a vat calculation method (gross amount, net amount, no VAT calculation) and a user group for each workflow she/he is attached to. The Default calculation method Gross amount is recommended. The user group defines which user group is automatically selected when routing window of a document is opened. It is useful to select the most used user group as default. The user group can always be changed in routing window.

Sales invoice row defaults –button is used for defining the following Sales invoicing –related settings:

- user’s default Invoice row type
- user’s default Product group

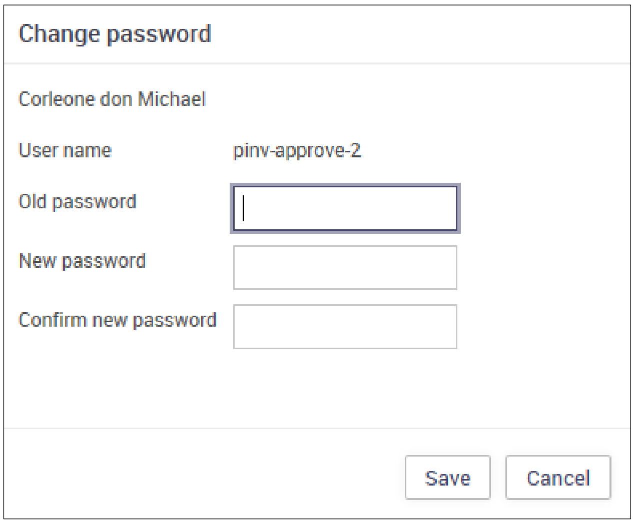
If these default values are set the program uses those as default value when the user is creating a new invoice row in Sales invoicing –module. Defining Sales invoice row defaults is described in more detail in the chapter **6.5 Sales invoice row defaults.**

The settings are saved with **Save** –button. **Cancel** –button closes the setting window and the data is not saved.

7.1 Change password

User can change hers/his password and approval password in the window opening with **Change password** or **Change approval password** –buttons. This feature is relevant only when CGI DataCycle360 login is used. When e.g. Windows single sign on is used, the password is changed with Windows functions.

When the system is set up the password might have been defined a cycle of expiration, complexity requirements and restrictions for recycling the same password.



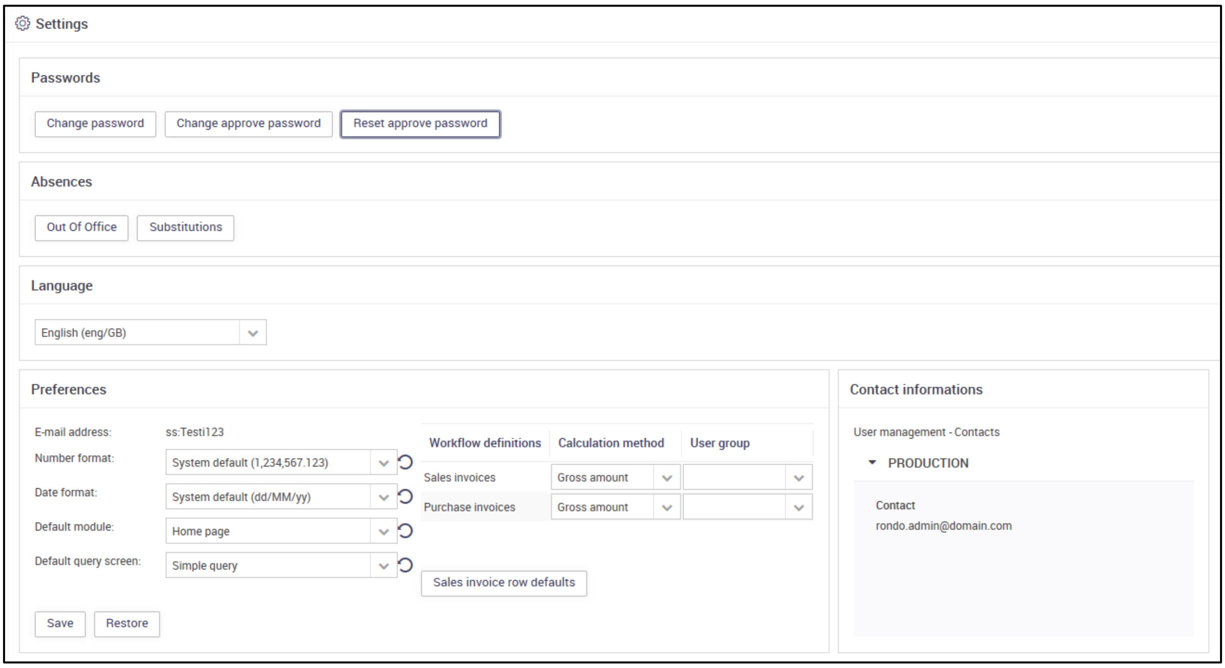
Both buttons open a similar window, where the old password is replaced with a new one. The user gives the current password into the **Old password** –field. A new password is given in both the **New password** and **Confirm new passwords** –fields.

The **save** –button saves the given information and the given new password is valid from this point forward. With the **cancel** –button the password change window is closed and the original password is still valid.

Confidential

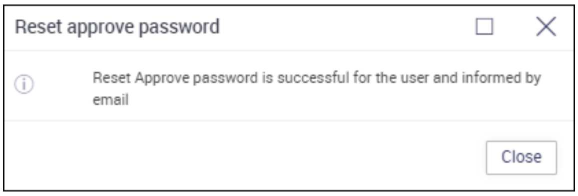
7.2 Reset Approve password

User can reset their own Approve password in the system by using this option.

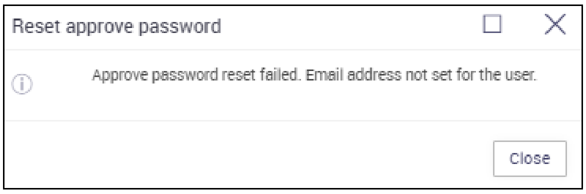


When this button is clicked, the user is first asked- “Do you want to reset your approve password?”

If “OK” is pressed and if an email is set for the user, the password gets changed automatically and the user is notified through an email and a pop-up indicating the same is displayed on the screen.



However, if no email is set for the user, it is not possible to reset the Approve password and a pop-up indicating the same is displayed on the screen.



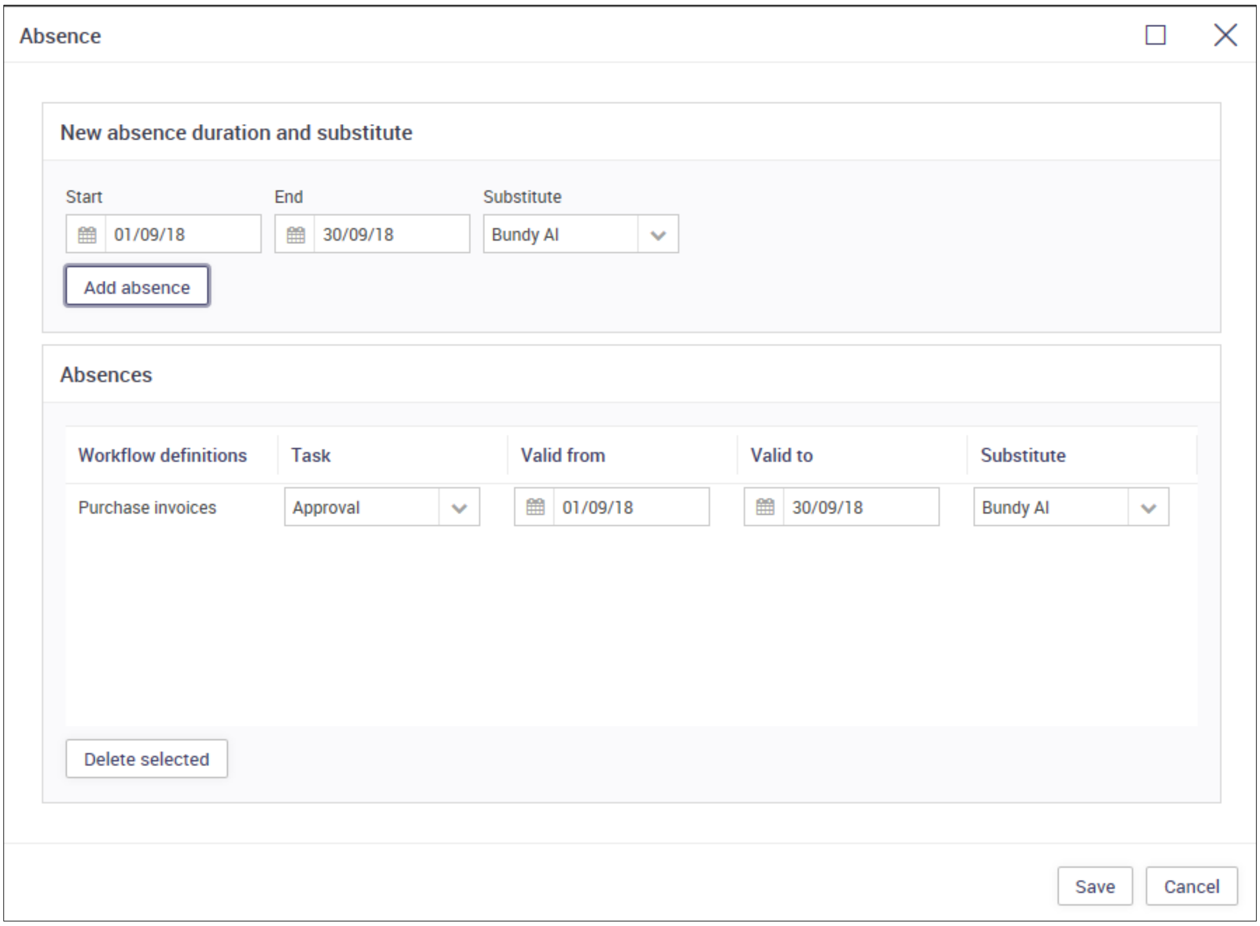
7.3 Absence

7.3.1 General

A user can administer hers/his absence information in the window opening with the **Out of office** – function button in **Absences** frame. The absence definitions are given individually for each workflow. Within each workflow the absences can be divided in periods or according to tasks.

7.3.2 Adding a new absence definition

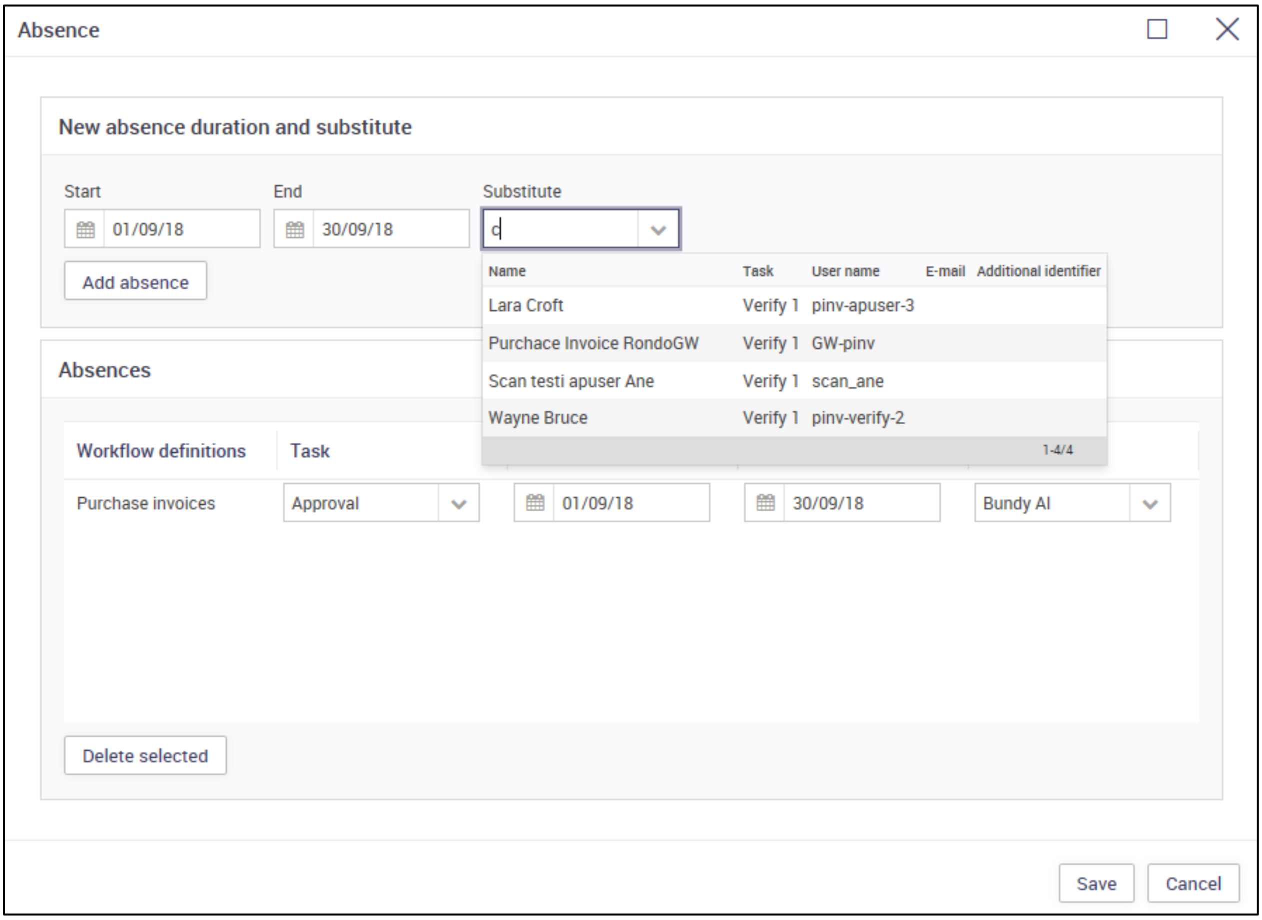
A new out of office definition is entered in the fields on top of the frame. When the data is entered it is transferred as a new absence row in the absences frame by **Add absence** –button. All the valid absence definitions are shown in the **Absences frame**. The fields on top are only for entering the data.



The duration of the absence is defined by entering **Valid from** and **Valid to** –dates. The dates can be typed in to the fields or selected from calendar opening with -icon. The date earlier than the current date can be defined when the absence is wanted to start immediately so that even the currently unhandled documents are visible to the substitute.

Confidential

The substitute for the absence duration defined is selected from the pick list in the field **Substitute.** The list shows the users which can act as substitute for the absent user in some workflow and some role. The list of selectable users can be limited by searching by name or a part of name.

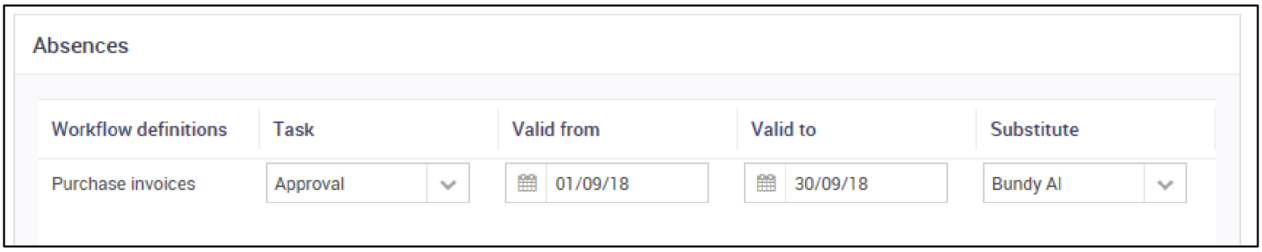


The defined absence period and substitute are transferred into the frame below with Add absence –button.

7.3.3 Valid absences

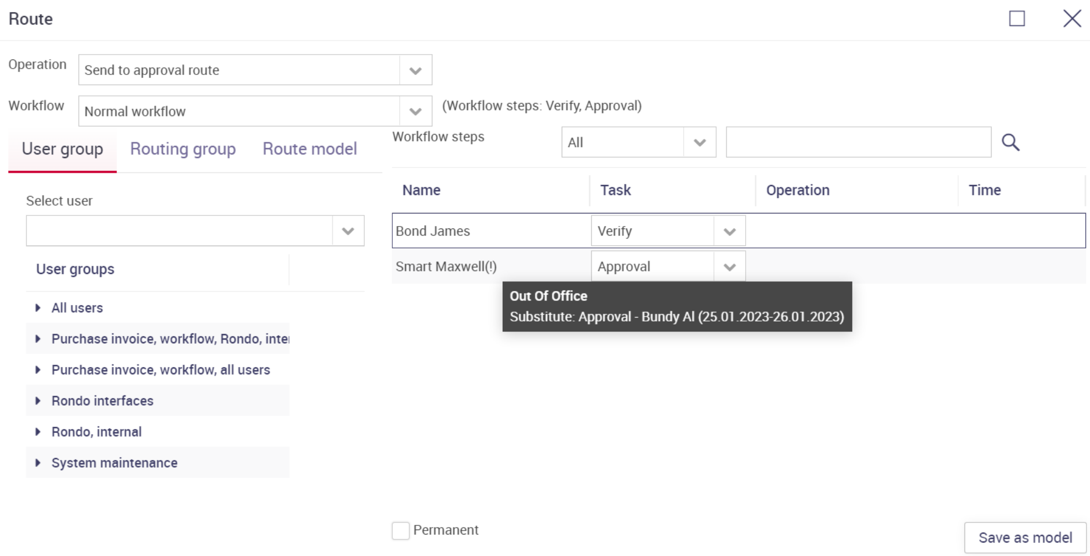
All the currently valid absences are visible in the **Absences** frame. The absence definitions can be changed in the frame. The fields **Valid from, Valid to and Substitute** are identical to the fields described above when adding new absence definitions.

The Task for the substitute to perform for the absentee is selected from the pick list in field **Task.** The substitute for a verifier can be either another verifier or an approver. If the **Substitute inherits person task rights**-has been chosen to the workflow, the substitute for approver can be any user. Else the approver's substitute can only be another approver.

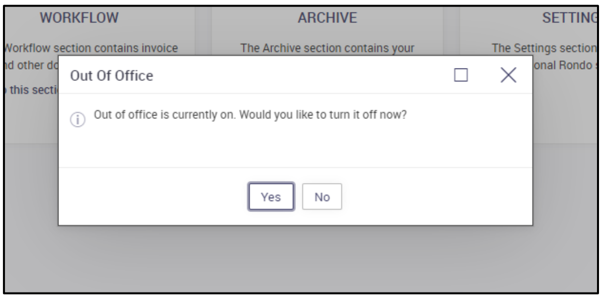


7.3.4 Absence Notification

If an out of office user is selected for some task (for example route approval), then an out of office notification will be displayed in the task listing for that user. Hovering the notification will show a popup with details relating to the absence, like name of substitute and absence start- and end dates:



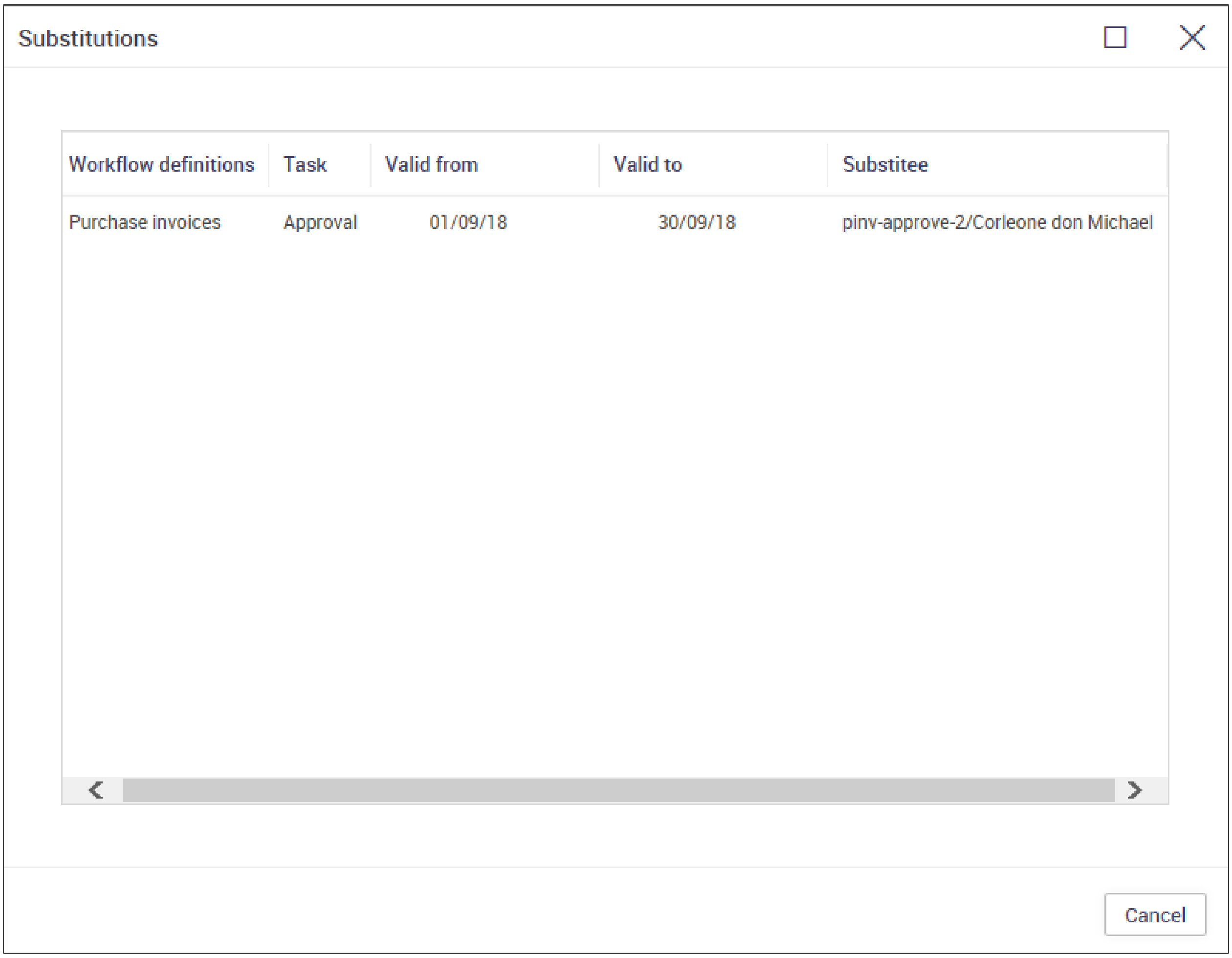
If an out of office user logs into the system, they will be greeted with a popup that allows the user to turn off the out of office –mode immediately:



Clicking ‘Yes’ will remove all the configured out of office notification which is falling within the current date for the user, and all absence notifications will be cleared immediately. The user will see page like below only with future date notifications.

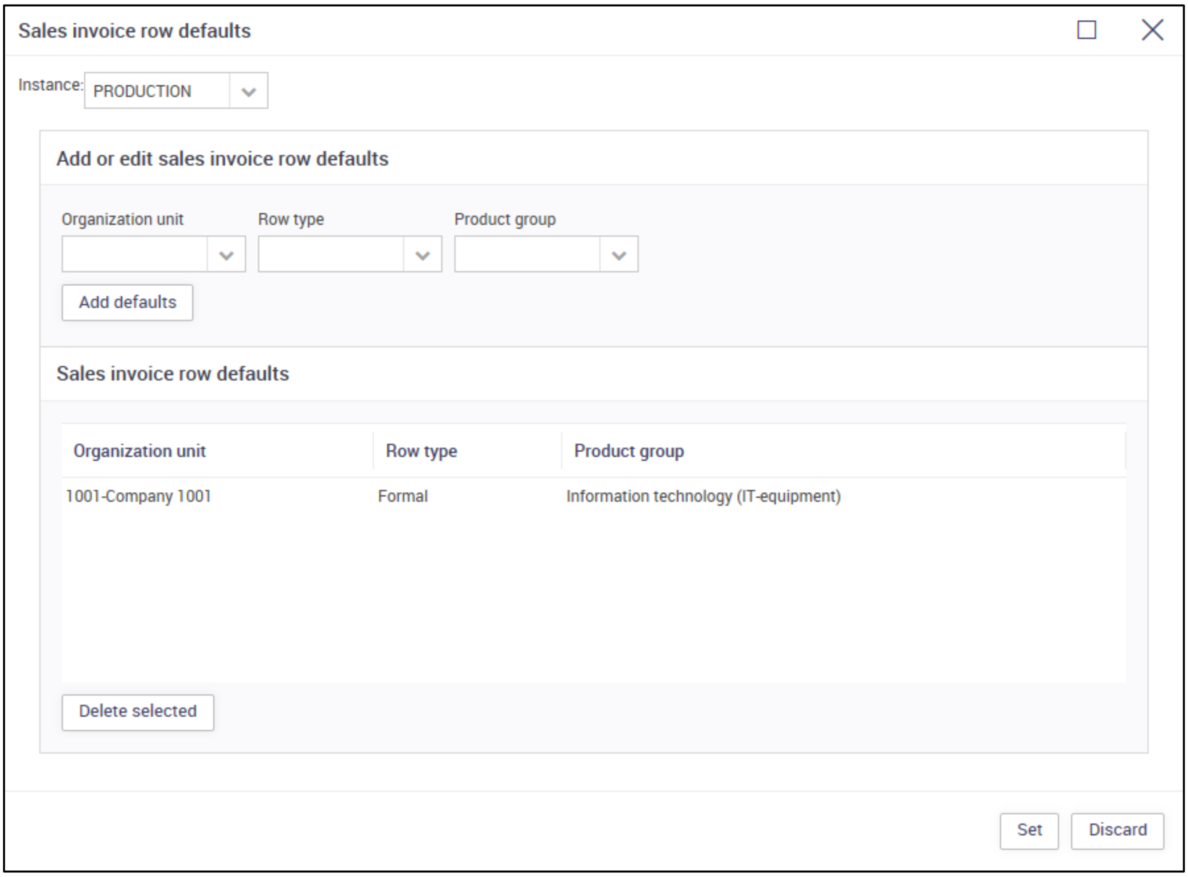
7.4 Substitutions

Substitutions –button in **Absences** –frame opens a window where all valid and expired substitutions defined for the user are listed. The function is a sort of mirror image of Absence -feature as it shows if the user has been defined as substitute and for whom. This is a view only function and the information cannot be changed.



7.5 Sales invoice row defaults

The **Sales invoice row defaults** –window is used for saving user specific settings for Invoice module.



User settings can be defined per organization. For example, Product groups may vary depending on the organization in use.

Organization unit: Organization for user's sales invoice row defaults.

Row type: Row type to be used as user's default row type when creating a new invoice row.

Product group: Product group to be used as user's default product group when creating a new product type invoice row.

Add defaults: User's settings are added to Sales invoice row defaults by pressing Add defaults –button. It is possible to add one Sales invoice row defaults –setting per organization.

Delete selected –button can be used for deleting organization specific settings row in **Sales invoice row defaults** –table.

The **set** –button saves the given information. With the **Discard** –button the given settings are discarded.

Please note: To save the given settings you also need to click on **Save** –button in the Settings main window.

cgi.com