



# SWANenterprise - SWANcloud

## User Manual

**SSC-Services GmbH**

Herrenberger Straße 56

71034 Böblingen

Germany

SWAN   
5.4

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**SSC-Services GmbH**

Herrenberger Straße 56

71034 Böblingen

Phone: +49 (0) 70 31/49 13 - 0  
Fax: +49 (0) 70 31/49 13 55  
Mail: kontakt@ssc-services.de  
Internet: <http://www.ssc-services.de>

Managing director: Matthias Stroezel  
Domicile: Böblingen  
Court of Registry: Stuttgart  
Commercial Register No.: 21439

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### Current document

SWANenterprise - SWANcloud/User Manual

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## List of abbreviations

Abbreviation	
<b>CFM</b>	Client Side Filemanager
<b>OFTP</b>	Odette File Transfer Protocol
<b>SWAN</b>	System for the Worldwide Exchange of Engineering Data
<b>URL</b>	Uniform Resource Locator
<b>PDF</b>	Portable Document Format

## Glossary

Term	Description
<b>CC Email</b>	Info mail about the transmission of data in SWAN. A CC email recipient only receives the information about the transmission, but not the data.
<b>CFM</b>	Client Side File Manager – tool which is used by SWAN for uploading and downloading data.
<b>ISO-Image File</b>	Computer file which contains a memory image of the content of a CD or DVD, structured in ISO 9660 format.
<b>OFTP</b>	<p>The Odette File Transfer Protocol (OFTP) is a protocol for the direct electronic transfer of files between two communication partners.</p> <p>It can be set upon different transport layers:</p> <p>Version 1 - ISDN (B and D channel), X.25, ...</p> <p>Version 2 - TCP/IP (Internet)</p>
<b>SWANcloud</b>	Product, distributed by SSC-Services GmbH for the worldwide exchange of engineering data. The subscription solution allows a cost-efficient data exchange as Internet service, which is available regardless of its location and without investments into IT infrastructure.
<b>SWANenterprise</b>	Product, distributed by SSC-Services GmbH for the worldwide exchange of engineering data. The purchase software allows the optional connection of third-party systems and the connection of external data exchange partners.
<b>TAR</b>	TAR is short for "Tape ARchive", which is an archiving tool in the UNIX environment that decompresses files sequentially into a single file (archive) and reading it again. The file ending for tar-archived files is .tar.
<b>URL</b>	Internet address or web address
<b>ZIP</b>	Format for compressed files, which reduces storage for archiving on the one hand and serving as container file on the other hand, where several related files or entire directory trees can be assembled. The file ending for zip-archived files is .zip.

# 1 Welcome to SWAN

SWAN is a professional data management system for the automated OFTP/OFTP2 data exchange between development partners. With SWAN, SSC Services GmbH offers a modular solution that covers any demands in a secure data exchange within the engineering environment.

Among other things, SWAN allows the worldwide connection of your partners through a secure data exchange portal, without the partner's need for an own data exchange system. The integration into your development environment can also be realized with SWAN. The connection of external applications or the activation of internal processes is considerably simplified and standardized through the integration of web services.

You can operate SWAN with the variants SWANenterprise and SWANcloud.

- SWANenterprise – purchase licence

The purchase software allows the optional connection of third-party systems and the connection of external data exchange partners.

- SWANcloud - service through the Internet

The subscription solution allows a cost-efficient data exchange as Internet service, being available site-independent and without investment into the IT infrastructure.

The following manual describes the elements of the user interface for both SWAN variants and informs you about the general aspects of operation.

The differences between both variants will be indicated accordingly.

## 2 General information about this manual

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

The user manual contains descriptions of the elements on the following tabs:

- **Job**
- **Outgoing**
- **Incoming**
- **Settings**
- **Project**

The tabs **Offline** and **Admin** are visible only to users with corresponding roles and authorisations. A description can be found in the SWAN admin manual.

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

- Instructions are preceded by the character ■.

Example:

- Click **OK**.

- The results of an action follow after the symbol ».


Example:

- » The **XXX** menu appears.

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

Example:

**Job** tab.

- Useful information can be found in the paragraphs marked with an .



### Information

You can .....

### 3 System requirements

The use of SWAN only requires an Internet browser and a valid SWAN client certificate.



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

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

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

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

The following browser versions are supported:

-  Internet Explorer, from version 7
-  Firefox, from version 4.0

The following browser components have to be activated and installed to make sure the data transfer (upload) is working correctly:

- Session cookies
- JavaScript enabled
- Java plug-in from version 7
- Java plug-in enabled
- Java temp folder available and sufficient storage space
- Windows temp folder available and sufficient storage space
- Internet Explorer: URL UTF-8 sending enabled (URL UTF-8 encoding activated)
- Screen resolution at least 1024x768 pixel
  - » The application of SWAN on smartphones, netbooks or tablets is not possible or only possible to a limited extend.

## 4 Launch SWAN

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


A screenshot of the SWAN Login web form. The form has a title bar that says "SWAN Login". Below the title bar, there are two input fields: "User id" and "Password". The "User id" field is a simple text box. The "Password" field is a text box with a small icon on the right side, likely for password visibility. Below the "Password" field is a "Login" button.

Figure 4.1 SWAN Login

## 5 Select the language of the program interface

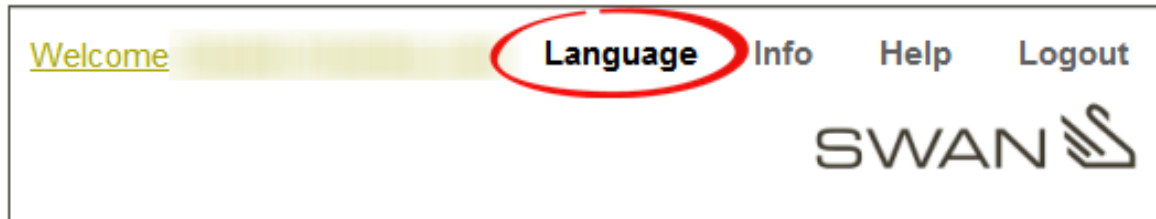


Figure 5.1

Select the language of the program interface

- Click on **Language**.
  - » A list with the supported languages of the user interface is displayed.

By now you can select the following languages:

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

- Click on the desired language.
  - » The desired language is applied to the program interface.



### Info

You can also select the language from the **Settings** tab.

## 6 Help and support for problems



### 6.1 Online manual and online help

- Click on **Help** to access the online manual.



Figure 6.1

Help - SWAN online help

- Please use the buttons  and  to access online help and additional information on the single steps of processing. Note the feedback of the system.

### 6.2 Support area of the SSC homepage

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

- Click on **Info** to access the support area of the SSC homepage.



Figure 6.2

Info – support area on the SSC homepage

### 6.3 Service Desk

Please contact our Service Desk if you need further support.

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

#### SSC-Services GmbH

Herrenberger Str. 56

71034 Böblingen

Phone: +49 (0) 70 31/4 91 31 00

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

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



## 7 The link 'Welcome [signed-in user]'

Information about your SWAN account is available under this link:

- Change password
- Personal data
- Contact data of the Service Desk
- Address codes for the receipt of jobs
- System news
- Usage agreements (option for SWANenterprise)
- Permissions



Figure 7.1

Welcome – SWAN account information

Information on your SWAN account

Change password

Old password

New password

Repeat password

Change password

Support

SWAN Service Desk

Mo. - Fr. 7:00 am - 5:00 pm (CET)

Phone number 1

+49 (0)7143-4811-100

Fax

+49 (0)7143-4811-100

E-mail

service@swan-services.de

Last 5 system notifications

There are no system notifications at the moment.

Personal data

Name

Christian Christian User

User name

cc@swan.de

Department

Technische Redaktion

Phone number 1

Fax

E-mail

cc@swan.de

Server

SSC-SERVICES

Host

192.168.0.1

Network IP Address

192.168.0.1

Language

English

Timezone

Central European Time

Your address codes (used for routing of incoming jobs)

Your personal address code

SSC0001100276

Project: Test-Projekt-CC

SSC0001100276

Accepted terms of use

There are no accepted terms at the moment.

Your permissions

project member

»

user (intern)

»

Figure 7.2 Information on your SWAN account

8

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## 8 Settings tab

Change and store different default settings under the tab **Settings**.

- Activate the tab **Settings**.
  - » The current SWAN settings are displayed.
- Activate the corresponding menu to adjust your settings.
  - ✓ Settings
  - ✓ Job lists
  - ✓ Delegation

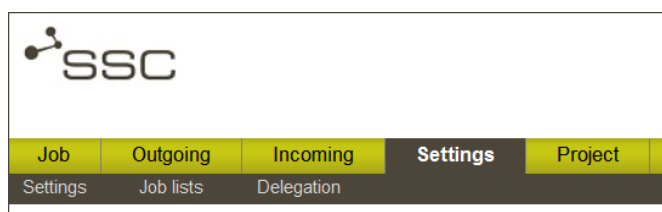
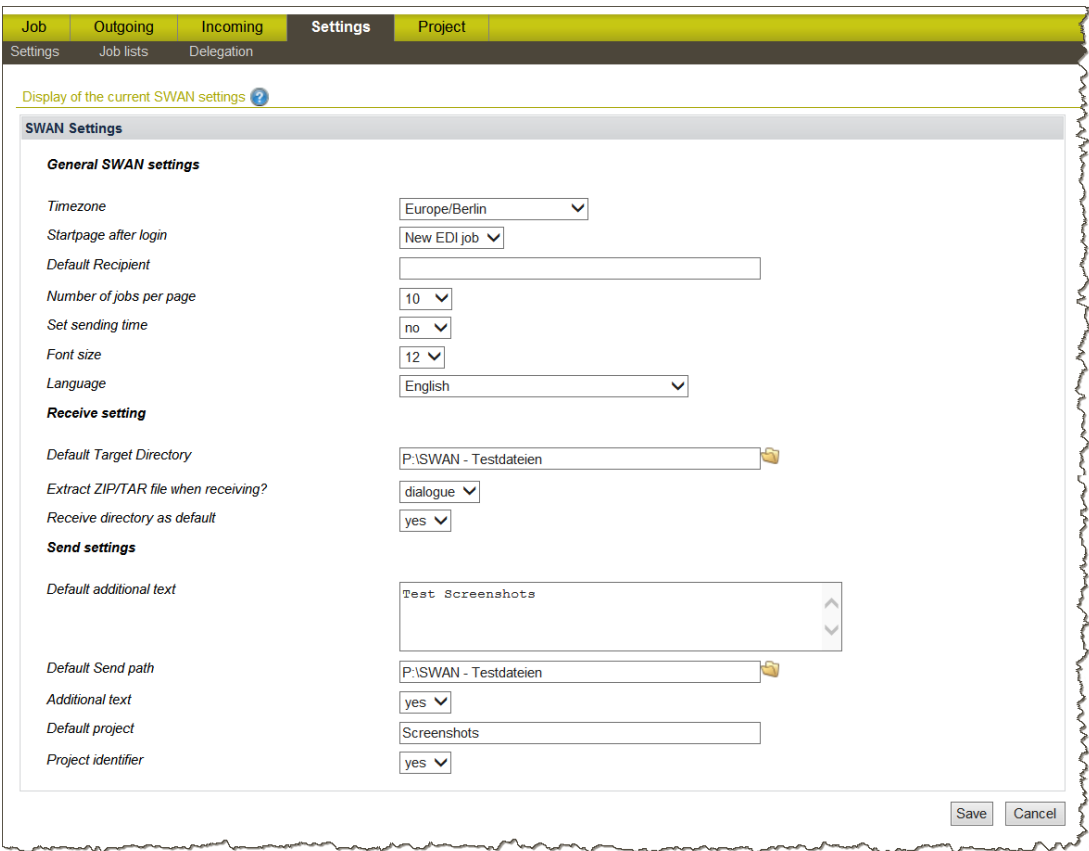


Figure 8.1

Settings tab

## 8.1 Settings menu



The screenshot shows the 'Settings' tab in the SWAN application. The top navigation bar includes 'Job', 'Outgoing', 'Incoming', 'Settings' (selected), and 'Project'. Below this, a sub-navigation bar shows 'Settings', 'Job lists', and 'Delegation'. The main content area is titled 'SWAN Settings' and contains a link 'Display of the current SWAN settings ?'. The settings are organized into sections: 'General SWAN settings' (Timezone: Europe/Berlin, Startpage after login: New EDI job, Default Recipient: empty, Number of jobs per page: 10, Set sending time: no, Font size: 12, Language: English), 'Receive setting' (Default Target Directory: P:\SWAN - Testdateien, Extract ZIP/TAR file when receiving?: dialogue, Receive directory as default: yes), and 'Send settings' (Default additional text: Test Screenshots, Default Send path: P:\SWAN - Testdateien, Additional text: yes, Default project: Screenshots, Project identifier: yes). 'Save' and 'Cancel' buttons are at the bottom right.

Figure 8.2 Settings > Settings

The SWAN system administrator can adjust the visibility of options and define the corresponding values of the areas that can be adjusted by the users.

- Activate the **settings** menu.
- Select the desired options.
- Click on **Save** to use the settings for forthcoming jobs.

The following table describes the most used options.

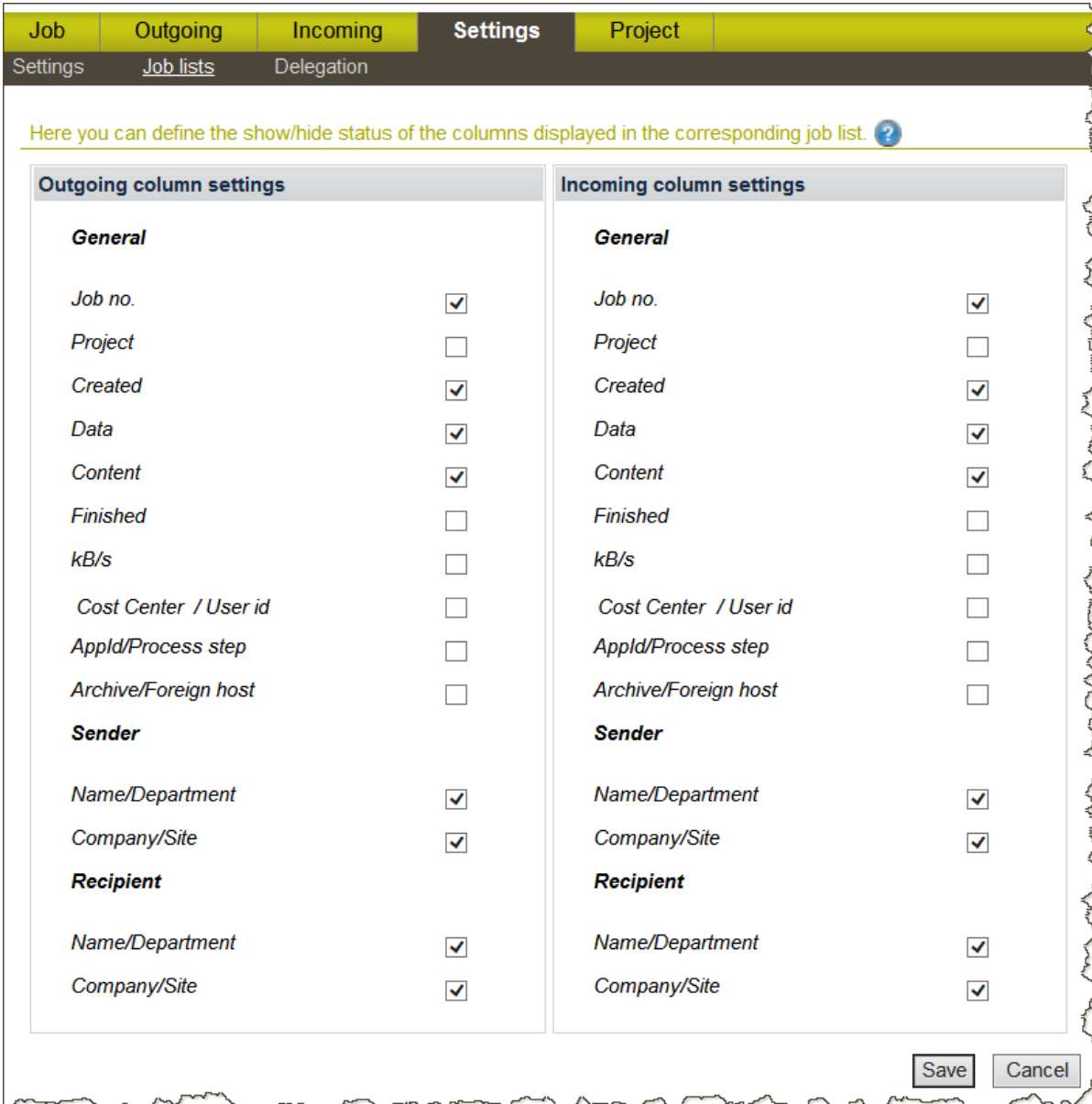
Option	Description
<b>Timezone</b>	Timezone of the server location. Example: Location Germany ⇔ Europe/Berlin
<b>Startpage after login</b>	Select which tab shall be activated after the login: Job – Outgoing – Incoming – Project – Offline (only in SWANenterprise).
<b>Default recipient</b>	The default recipient is entered into the To: field for news jobs.
<b>Number of jobs per page</b>	Define how many jobs are displayed per page.
<b>Font size</b>	Font size of the user interface.
<b>Language</b>	Language of the user interface.
<b>Default additional text</b>	Enter the text that shall be sent to the data recipient in new jobs.
<b>Default Send path</b>	Select a directory, which is used as default when selecting files for sending.
<b>Additional text</b>	Switch on / off the use of a default additional text for a new send job.
<b>Standard project</b>	Enter a project identifier, which is transmitted to the data recipient in a new job.
<b>Project identifier</b>	Switch on / off the use of a project identifier in a new job.
<b>Default Target Directory</b>	Select a directory, which is used as default when storing received files.
<b>Extract ZIP/TAR file when receiving?</b>	Set up how to process received ZIP/TAR files.
<b>Receive directory as default</b>	Switch on / off the use of a default receive directory.

Table 8.1 SWAN settings – most used options

## 8.2 Job lists menu

Here you define which columns shall be displayed in the job lists for sending (**Outgoing** tab) and receiving (**Incoming** tab) data.

- Activate the menu **Job lists**.
- Activate the corresponding check box and save your selection.



Here you can define the show/hide status of the columns displayed in the corresponding job list. ?

Outgoing column settings		Incoming column settings	
<b>General</b>		<b>General</b>	
Job no.	<input checked="" type="checkbox"/>	Job no.	<input checked="" type="checkbox"/>
Project	<input type="checkbox"/>	Project	<input type="checkbox"/>
Created	<input checked="" type="checkbox"/>	Created	<input checked="" type="checkbox"/>
Data	<input checked="" type="checkbox"/>	Data	<input checked="" type="checkbox"/>
Content	<input checked="" type="checkbox"/>	Content	<input checked="" type="checkbox"/>
Finished	<input type="checkbox"/>	Finished	<input type="checkbox"/>
kB/s	<input type="checkbox"/>	kB/s	<input type="checkbox"/>
Cost Center / User id	<input type="checkbox"/>	Cost Center / User id	<input type="checkbox"/>
Appld/Process step	<input type="checkbox"/>	Appld/Process step	<input type="checkbox"/>
Archive/Foreign host	<input type="checkbox"/>	Archive/Foreign host	<input type="checkbox"/>
<b>Sender</b>		<b>Sender</b>	
Name/Department	<input checked="" type="checkbox"/>	Name/Department	<input checked="" type="checkbox"/>
Company/Site	<input checked="" type="checkbox"/>	Company/Site	<input checked="" type="checkbox"/>
<b>Recipient</b>		<b>Recipient</b>	
Name/Department	<input checked="" type="checkbox"/>	Name/Department	<input checked="" type="checkbox"/>
Company/Site	<input checked="" type="checkbox"/>	Company/Site	<input checked="" type="checkbox"/>

Save Cancel

Figure 8.3

Settings &gt; Job lists

### 8.3 Delegation menu

The delegation feature allows you to grant other users from your company access to your jobs. You can grant temporarily limited rights for reading, downloading and receiving a CC email for incoming jobs.



#### Info

Every 6 months SWAN sends an email to all users who have set up one or more delegates. This email contains all delegations of the corresponding user and a direct link to manage these delegations.

- Activate the **Delegation** menu.
  - Click on **Add user** .
    - » The **Edit access settings** menu is displayed.
  - Click on .
    - » The search mask with the search criteria is displayed.
  - Select a user with the search criteria.
  - Click on to select the desired user from the search results.
  - Edit the access settings and save the selection.
- The access is temporarily unlimited if you don't enter the field **Valid until**.

Job	Outgoing	Incoming	Settings	Project
Settings	Job lists	Delegation		

The delegation function offers you the opportunity to allow other users of your company access to your jobs. ?

Users who are allowed to access your jobs					
Add user					
User	Read	Download	CC email	Valid until (incl.)	Actions
User Test	<input checked="" type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Dec 31, 2014	

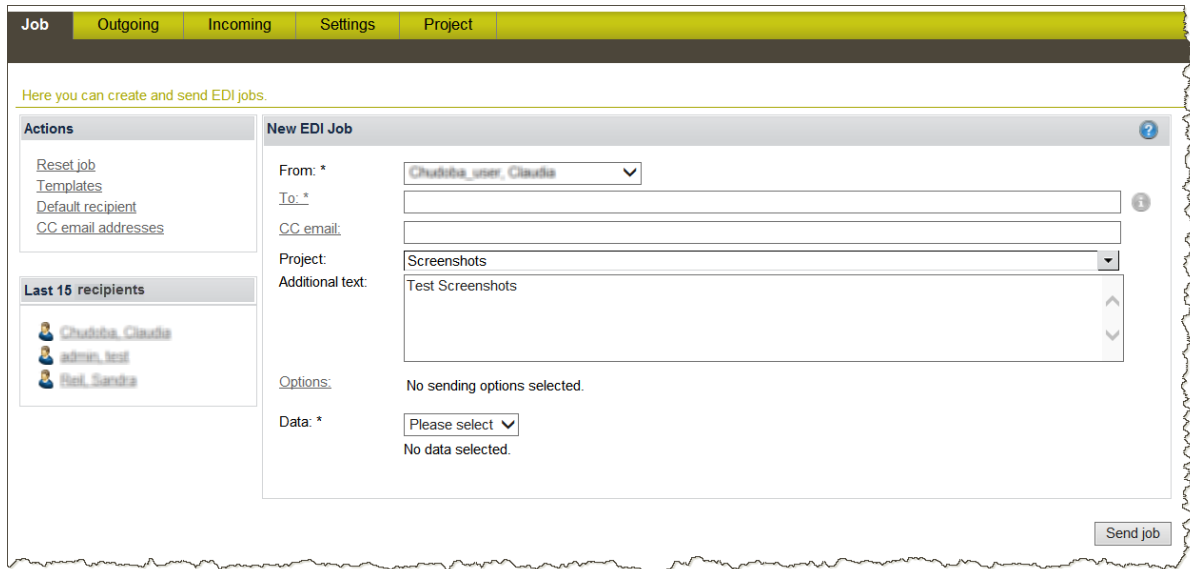
Figure 8.4

Settings > Delegation

## 9 Job tab

On the job tab you can create and send jobs.

- Activate the **Job** tab.



The screenshot shows the 'Job' tab interface. At the top, there are tabs: Job, Outgoing, Incoming, Settings, and Project. Below the tabs, a message says 'Here you can create and send EDI jobs.' On the left, there are two sections: 'Actions' with links for 'Reset job', 'Templates', 'Default recipient', and 'CC email addresses'; and 'Last 15 recipients' showing a list of users: 'Chudoba, Claudia', 'admin\_test', and 'Reif, Sandra'. The main area is titled 'New EDI Job' and contains the following fields: 'From: \*' (a dropdown menu showing 'Chudoba\_user, Claudia'), 'To: \*' (a text input field), 'CC email:' (a text input field), 'Project:' (a dropdown menu showing 'Screenshots'), 'Additional text:' (a text input field with 'Test Screenshots'), 'Options:' (a section with 'No sending options selected.'), and 'Data: \*' (a dropdown menu showing 'Please select' with 'No data selected.' below it). A 'Send job' button is located at the bottom right of the form.

Figure 9.1 Job tab

### 9.1 New EDI job area

In this area you can select the data recipients, CC email recipients and the data to be sent and provide additional information to the data recipient.

Field	Description
From:	Selection as to whether you want to send data as a user or as a project member, in the name of a project. (This is only displayed if you are assigned to a project.)
To:	Recipient of the data
CC email	Recipients who shall be informed about the data transmission
Project	You can enter a project ID here, or if you send out data in the name of a project, the saved project name is entered here.
Additional text	Additional information for the data recipient
Options	SWANenterprise – processing options and offline job
Data	Data source ✓ SWANcloud – only file system ✓ SWANenterprise – file system and other sources

Table 9.1 New job – description of the input fields





#### Project function info

The **project function** enables you to send out data in the name of a project.

The field **From:** is only displayed if you are assigned to a project.

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

Via the link '**Welcome [registered user]**', you can see whether you are a project manager in the **Permissions** area.

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

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

If files are sent to a project, the job appears for all project members in the incoming list.



#### Info

The fields **project identifier** and **additional text** are optional and can be enabled or disabled through the **settings** menu.

The field **Options** is only available in SWANenterprise.

### 9.1.1 Select recipient

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



#### Info

Recipients within the own company or users within the portal solution (SWANcloud) receive an email. Recipients who receive the data via OS4X don't get an email.


**CC email recipients don't** receive any data; they are only informed via email with a data delivery note about the transmission.

There are several options for the recipient selection:

- Quick selection (last 15 recipients)
- Quick search
- Selection via search mask

#### Quick selection

SWAN stores the last 15 recipients. You can select the desired recipient directly from the list **Last 5 recipients**.

- Click on the desired recipient.
- The selected recipient is entered into the field **To:**.
- Click on  for further information about the selected recipient.

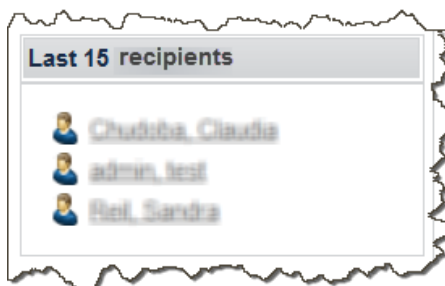


Figure 9.2 Recipient selection – quick selection

### Quick search

- Enter the field **To:** and provide
  - ◆ First name,
  - ◆ Last name,
  - ◆ Company or
  - ◆ User name (User id) of the desired recipient.
- » A list of suggestions is displayed when entering the first three letters.



#### Information

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

- Click on **To:** and use the search field **Project**.

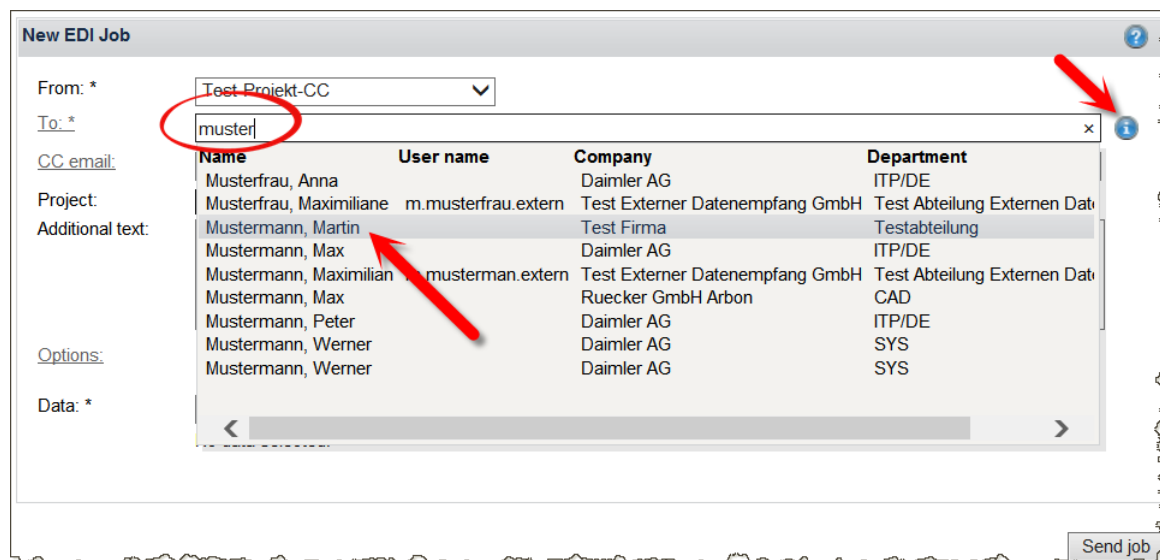



Figure 9.3 Recipient selection - Quick search

- Click on the desired recipient.
- » The selected recipient is entered into the field **To:**.

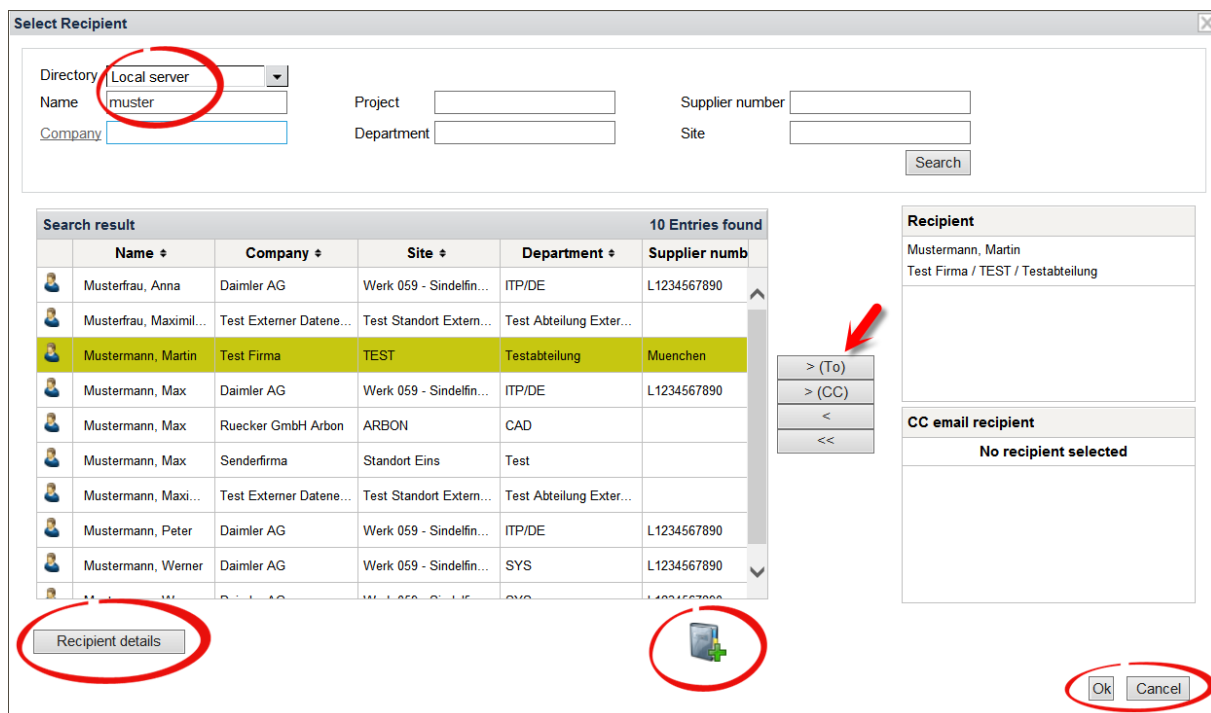
- Add other recipients, if desired.
- Click on  to get information about the selected recipients.

### Selection through search mask

#### – Select search directory

Here you define the directory where you want to search for the recipient.

- Click on **To**:
  - » The search mask is displayed with different search criteria.
- First select the desired option from the list **Directory**.



**Select Recipient**

Directory: Local server  
 Name: muster  
 Company:   
 Project:   
 Supplier number:   
 Department:   
 Site:   
 Search

Search result						10 Entries found
	Name	Company	Site	Department	Supplier numb	
	Musterfrau, Anna	Daimler AG	Werk 059 - Sindelfin...	ITP/DE	L1234567890	
	Musterfrau, Maximil...	Test Externer Datene...	Test Standort Extern...	Test Abteilung Exter...		
	<b>Mustermann, Martin</b>	<b>Test Firma</b>	<b>TEST</b>	<b>Testabteilung</b>	<b>Muenchen</b>	
	Mustermann, Max	Daimler AG	Werk 059 - Sindelfin...	ITP/DE	L1234567890	
	Mustermann, Max	Ruecker GmbH Arbon	ARBON	CAD		
	Mustermann, Max	Senderfirma	Standort Eins	Test		
	Mustermann, Maxi...	Test Externer Datene...	Test Standort Extern...	Test Abteilung Exter...		
	Mustermann, Peter	Daimler AG	Werk 059 - Sindelfin...	ITP/DE	L1234567890	
	Mustermann, Werner	Daimler AG	Werk 059 - Sindelfin...	SYS	L1234567890	

Recipient details

> (To)  
 > (CC)  
 <  
 <<

**Recipient**  
 Mustermann, Martin  
 Test Firma / TEST / Testabteilung

**CC email recipient**  
 No recipient selected

Ok Cancel

Figure 9.4 Recipient selection - search mask (1)

#### – Execute search

Make your entries in the different search fields.

- Enter the corresponding search field and click on **Search** or confirm with [ENTER]
  - » A list with the search result is displayed.



#### – Select recipient

- Click on the desired recipient in the list **Search Result**. You can select several recipients at the same time.
  - » The selected recipient is highlighted.
- Click on **To>>** or **CC>>**
  - » The selected recipient is added to the corresponding recipient list.

- Add other recipients, if required.
- Remove all or selected recipients from the list by clicking on **Remove All** or **Remove**.

#### – Recipient and personal address book

You can add or remove recipients to and from your personal address book.

- Search for the desired recipient via the recipient search.
- Select the desired recipient.
- Click on  to add a selected recipient to your personal address book or click on  to remove the recipient from your address book.

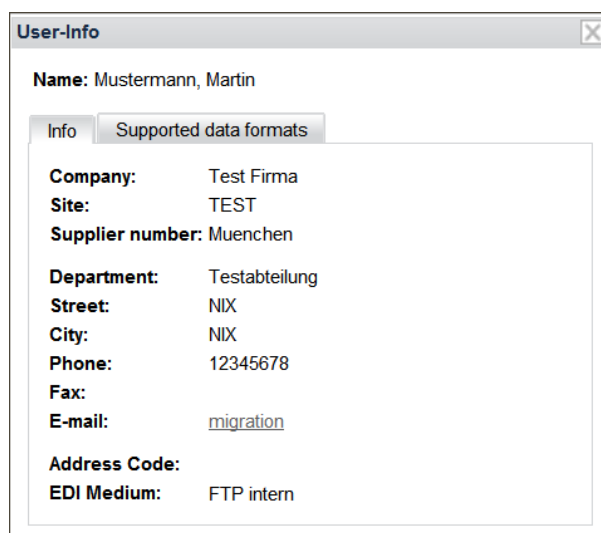


#### Info

Once having sent data to a recipient, it will be added to your personal address book automatically.

#### – Query recipient details

- Click on **recipient details** to get information on the selected recipient.



The dialog box titled "User-Info" displays the following details for a selected recipient:

<b>Name:</b> Mustermann, Martin	
Info Supported data formats	
<b>Company:</b>	Test Firma
<b>Site:</b>	TEST
<b>Supplier number:</b>	Muenchen
<b>Department:</b>	Testabteilung
<b>Street:</b>	NIX
<b>City:</b>	NIX
<b>Phone:</b>	12345678
<b>Fax:</b>	
<b>E-mail:</b>	<a href="#">migration</a>
<b>Address Code:</b>	
<b>EDI Medium:</b>	FTP intern

Figure 9.5 Recipient selection - query recipient details

#### – Finish recipient selection

- Click on **OK**.
- Now you can make further entries in your job.

### 9.1.2 Select data from the file system

- Select the entry **Filesystem** under **Data**.
  - » The window **Add file** is displayed.

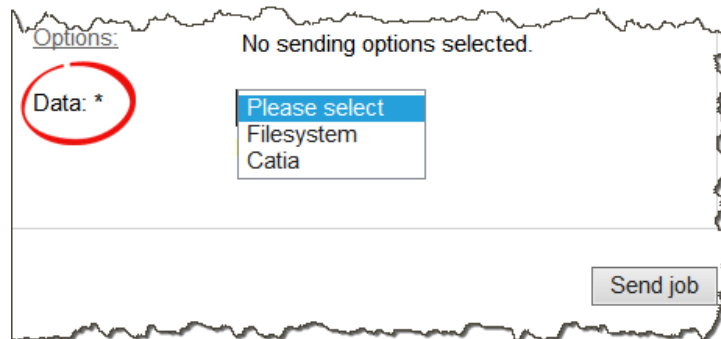


Figure 9.6 Selecting the send directory



#### Info - Option for SWANenterprise

Besides the opportunity to select your files from the file system in SWANcloud, the product SWANenterprise provides you with the opportunity to select data from e.g. a connected CAD or PLM system. In this case, there are more entries available under **Data**.

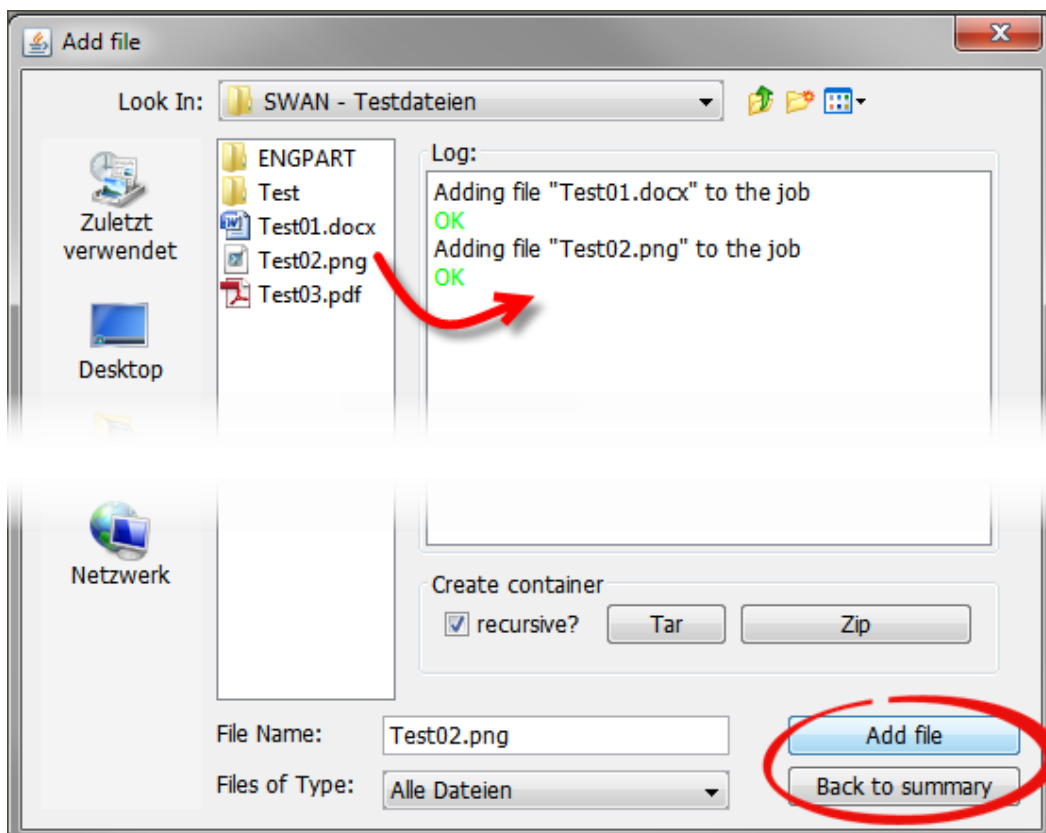


Figure 9.7 Selecting data from the filesystem

- Select:
  - ✓ A single file through double click.
    - » The file is directly added to the send list.
  - ✓ A single file through mouse click and click on **Add file**.
    - » The file is added to the **Log** window.
  - ✓ Several files with CTRL/SHIFT key and click on **Add file**.
- Add further files, if desired.
- Click on **Tar** or **Zip**, if you wish to compress the file size.


**Info**

With the option **create container**, you can compress the selected files into a Tar or Zip container. You can enter a name for the Tar or Zip archive. If you don't enter a name, the system will generate one.

You can select entire directories by activating **recursive?**

The whole structure will be added, i.e. the generated TAR file might be very large for deep directory trees.

- Check the size before selecting.
- Consult with the recipient, if he's able to handle directory structures, as many companies cannot process directories due to automatic receipt processes.

- Click on **Back to job overview** to add the files to the job list.
  - » Through the **Recycle bin** icon  at the bottom of the line you can remove single files from the job list.

### 9.1.3 Sending options (option in SWANenterprise)

Depending on the supported processes of your SWANenterprise variant you can select different processing options.

- Click on **Options** in the area **New EDI job**.
  - » The window **Sending options** is displayed.

**New EDI Job**

From: \*

To: \*

CC email:

Project:

Additional text:

Options: No sending options selected.

Data: \*

No data selected.

**Send job**

Figure 9.8 Sending options in SWANenterprise

- Activate the tab **Processes**.

**Sending options**

Process Steps

Here you can select additional process steps. These will be sequentially applied to your data. Please note that only one conversion and only one compression is possible per job.

Process Steps	Description
Please select	
CATDrawing > PDF	
CATParts > STEP fuer DiFa	
Catia > CGR	
Catia > IGES	
Catia > NxBRP	
Catia > NxFeature	
Catia > STEP	
Catia > dxf	
Catia > jt	
Catia > vda	
DTNA	
Dxf > CatiaV5	
GZip	
IGES > CatiaV5	
STEP > CatiaV5	
STEP_SAM fuer CatiaV5	
TAR	
VDAFS > CatiaV5	
ZIP	

**Reset** **Ok** **Cancel**

**Send job**

Figure 9.9 Process steps in SWANenterprise

- Select the desired process step.

- Click on **OK**.



#### Info - Option in SWANenterprise


In addition to SWANcloud, the product SWANenterprise provides extended compression methods, allowing you to process your files before sending. You can define the desired process steps under **Options**. The processing is made in the order of the process step selection.

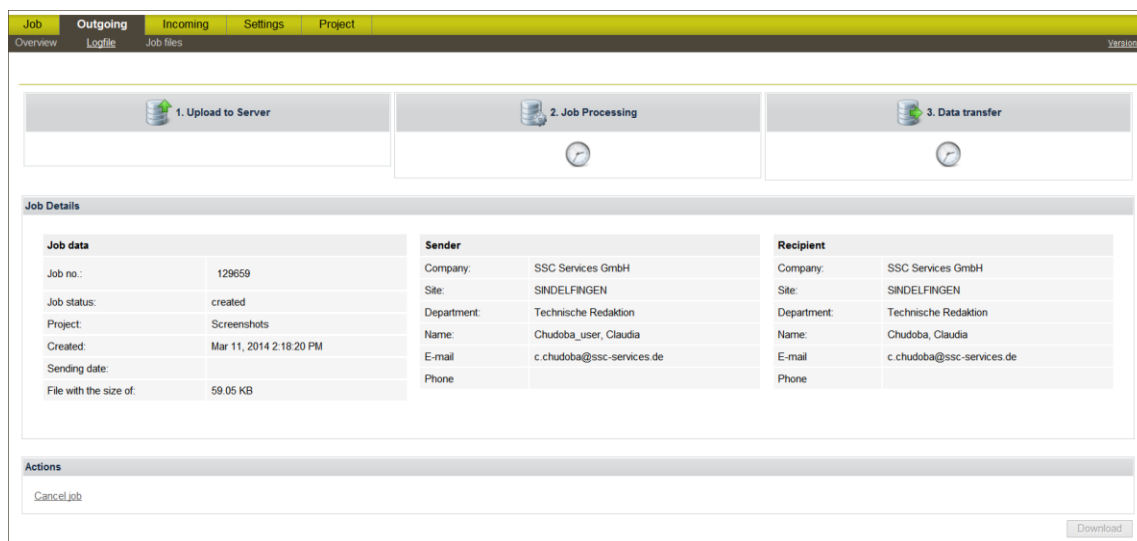
A conversion (e.g. CATIA ⇒ JT) always has to be made prior to a compression (TAR, ZIP,GZIP).

- Consider the order when selecting the process steps.
- Please note that only one conversion step and one compression step can be used for each job.

### 9.1.4 Send job

When you have added all files to the job and selected the desired processing options (option for SWANenterprise) you can complete the job creation.

- Click on **Send Job**.
  - » The job is processed and the files are sent.
  - » The **summary** view of the **outgoing** tab is displayed, showing you the details on the job.
  - » The green checkmark  is displayed when the corresponding section is completed successfully.



Job data		Sender		Recipient	
Job no.:	129659	Company:	SSC Services GmbH	Company:	SSC Services GmbH
Job status:	created	Site:	SINDELFINGEN	Site:	SINDELFINGEN
Project:	Screenshots	Department:	Technische Redaktion	Department:	Technische Redaktion
Created:	Mar 11, 2014 2:18:20 PM	Name:	Chudoba_user, Claudia	Name:	Chudoba, Claudia
Sending date:		E-mail:	c.chudoba@ssc-services.de	E-mail:	c.chudoba@ssc-services.de
File with the size of:	59.05 KB	Phone:		Phone:	

Figure 9.10

Job details – Overview Screen



The job has been transferred successfully when all three sections are checkmarked.

### Outgoing tab

- Left checkmark: The files have been transferred from the client (user PC) to the server.
- Centre checkmark: The job has been processed.
- Right checkmark: The job has been passed to the sending system for transmitting to the recipient.

### Incoming tab

- Left checkmark: The job has been received.
- Centre checkmark: The job has been processed.
- Right checkmark: The job has been delivered to the local recipient.

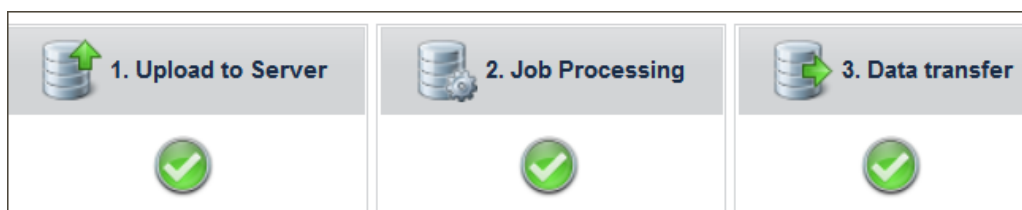


Figure 9.11 Job transferred successfully



#### Info - Client Side File Manager (CFM)

The upload and download of data is executed by **Client Side File Manager (CFM)**.

- Please find information about the use of CFM in the attachment of this document.

- Click on **Logfile** or **Job files** in order to receive further information about your job.

Job	Outgoing	Incoming	Settings	Project
Overview	Logfile	Job files		
Here you see the events for the job 129659				
Date		Message		
Mar 11, 2014 2:18:20 PM		Created Job with ID:129659		
Mar 11, 2014 2:18:40 PM		start Upload of job [129659] by user [ ] on machine [SSC ] P:\SWAN - Testdateien - Test01.docx P:\SWAN - Testdateien - Test02.png		
Mar 11, 2014 2:18:41 PM		end Upload of job [129659] Transferrate: 123.0 kb/s		
Mar 11, 2014 2:19:00 PM		Start job processing		
Mar 11, 2014 2:19:13 PM		Determine next ProcessStep [CheckPoint - before compress] with weight [5.0]		
Mar 11, 2014 2:19:16 PM		Determine next ProcessStep [GZip] with weight [1035.0]		
Mar 11, 2014 2:19:17 PM		Wait for synchronous ProcessStep [GZip] with state [WAITING]		
Mar 11, 2014 2:19:17 PM		Finish processing with status [WAITING]		
Mar 11, 2014 2:19:17 PM		Start job compression		

Figure 9.12 Job details – Logfile Screen

Job

Outgoing

Incoming

Settings

Overview

Logfile

Job files

Here you see all files of the job 129659

File name
<div>Test01.docx.gz</div> <div>ENG14031114182000282003002</div>
<div>Test02.png.gz</div> <div>ENG14031114182000282003003</div>

Generated delivery note: [deliveryNote\\_000129659\\_de.pdf](#)

Content	Creation date	File Size	Format
<div>» [Content_Types].xml [XML]</div> <div>» _rels/.rels [XML]</div> <div>» docProps/app.xml [XML]</div> <div>» docProps/core.xml [XML]</div> <div>» docProps/thumbnail.emf [unknown]</div>	Mar 11, 2014 2:20:07 PM	40.48 KB	GZIP
<div>» word/theme/theme1.xml [XML]</div> <div>» word/webSettings.xml [XML]</div>			
<div>» OutFile_5b4Y5H71M [unknown]</div>	Mar 11, 2014 2:20:07 PM	14.88 KB	GZIP

Figure 9.13 Job details – View of the job files

### 9.1.5 Offline data exchange (option in SWANenterprise)

SWANenterprise allows you to exchange data via encrypted data carrier (CD/DVD). This could be necessary if the recipient has no own OFTP system or if the data amount is too extensive for a transmission via Odette/ISDN.

A so called offline administrator can create media and is able to read-in received media to forward these to a recipient in SWAN.

#### Create offline job

The recipient selection and the selection of files is made like for a regular job.

- Select the data recipient and the files for sending.
- Click on **Options**.
  - » The window **Sending options** is displayed.
- Activate the **Offline** tab.
- Select the desired media and the offline administrator.
- Click on **OK**.
- Click on **Send job**.
  - » An ISO image file is created and will be transmitted to the offline administrator.
  - » The offline administrator creates the media with encrypted data and the creator of the offline job receives an email with a password, the recipient of the media receives a so called Private Key. These two components provide the key for reading the data.

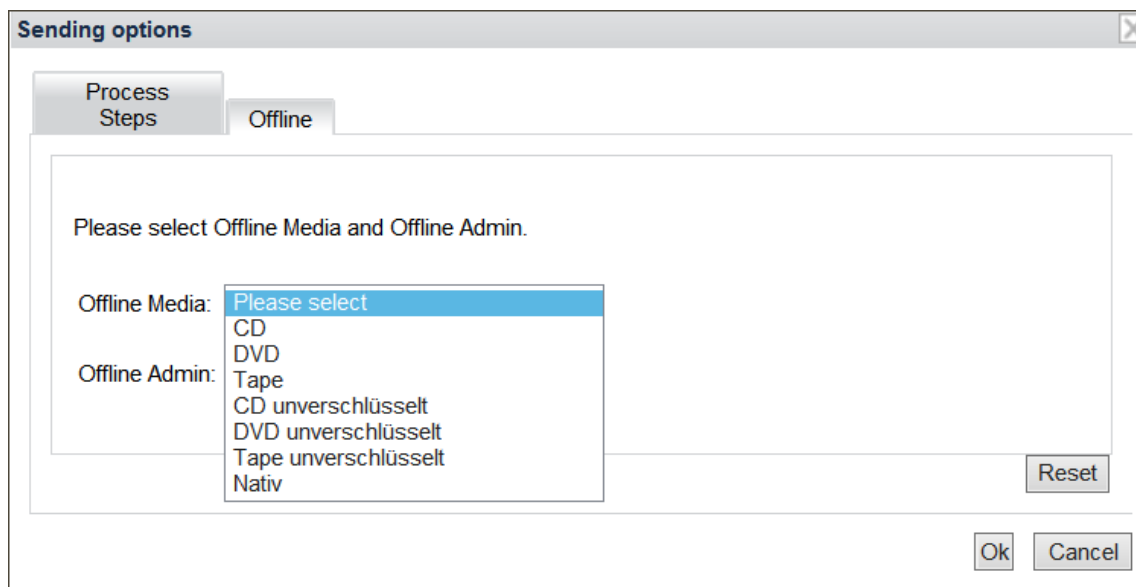


Figure 9.14 Datei-Optionen - Offline

**Decrypt the content at the recipient**

By means of a client, which is written on every medium along with the engineering data, the recipient can decrypt the data in a user-friendly interface and unpack them automatically, if desired. For this purpose, the corresponding password has to be transmitted by the job creator. Afterwards the data is available for further processing.

**Read-in medium**

The offline administrator can read-in the data from a data carrier into SWAN and send the data to a recipient. In this course a fully equipped Odette job is created and can be researched in SWAN.

### 9.1.6 Cancel job

With the **Cancel job** button under **Actions** you can cancel the transmission of a job.

The screenshot shows a web interface for job management. At the top, there is a button labeled '1. Upload to Server' with a green checkmark icon. Below this is a section titled 'Job Details' which contains two tables. The first table, 'Job data', lists job information: Job no. (129659), Job status (waiting), Project (Screenshots), Created (Mar 11, 2014 2:18:20 PM), Sending date (Mar 11, 2014 2:19:17 PM), and File with the size of (59.05 KB). The second table, 'Sender', lists contact information: Company, Site, Department, Name, E-mail, and Phone. At the bottom of the 'Job Details' section is an 'Actions' section containing a button labeled 'Cancel job', which is circled in red.

Figure 9.15 Cancel job



#### Info

Depending on its size, it might not be possible to cancel a job anymore.

You cannot restart a cancelled job by yourself.

- Please create a new job if you wish to send the job after you have cancelled it.

## 9.2 Actions Group

### 9.2.1 Reset job

You can delete the entries from the group **New EDI job** and reset them to the default settings (**Settings** tab).

- Click on **Reset job** under the group **Actions**.
  - » The entries in the input fields will be deleted and reset to the default settings.

### 9.2.2 Templates

You can create templates and select these for recurring send jobs.

#### Create new template

- Activate the **Job** tab.
- Fill in the fields under **New EDI job**.
- Click on **Templates** under **Actions**.
- Activate **Save template**.
- Select a name for the template and confirm with **OK**.

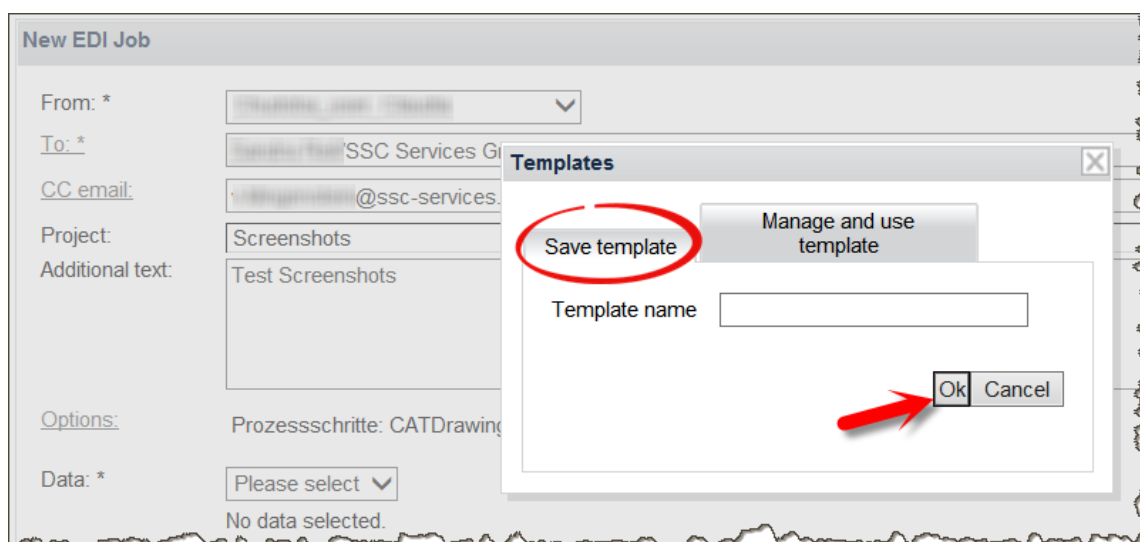


Figure 9.16 Create template

### Manage and use template

- Activate the **job** tab.
- Click on **Templates** under **Actions**.
- Activate **Manage and use template**.

Here you can

- ✓ Search for templates,
- ✓ Delete templates
- ✓ Select templates for a new send job.

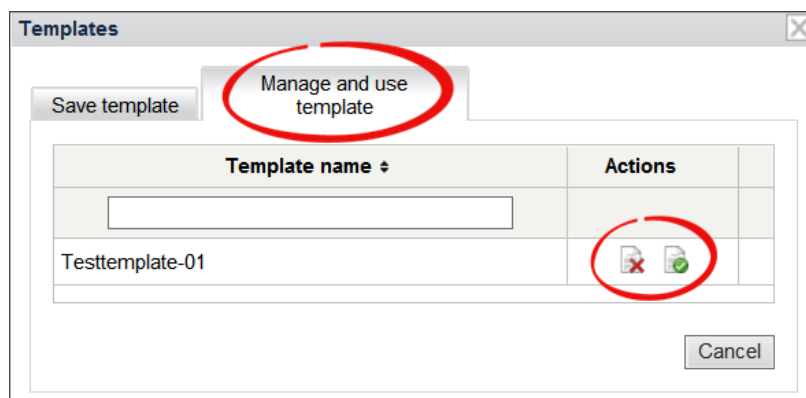


Figure 9.17 Manage and use template

### 9.2.3 Default recipient

If you have defined a default recipient, it is automatically entered for a new job in the field **To:**.



#### Info

You can set up the desired **default recipient** under **Settings**.

- Click on **Default recipient** under the group **Actions**.
  - » The window for managing default recipients is displayed.

You can

- ✓ Search for recipients,
- ✓ Select a recipient as default recipient,
- ✓ Delete an existing default recipient.

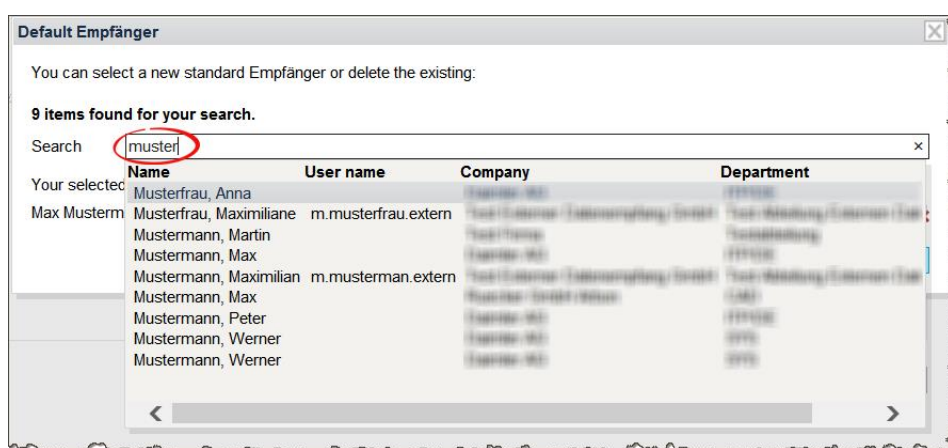


Figure 9.18

Edit default recipient



### 9.2.4 CC email addresses

CC email recipients ***don't receive*** any data; they are only informed about the data transfer via email with a data delivery note.

- Click on **CC email addresses** under the group **Actions**.
  - » The window for managing the CC email addresses is displayed.

Figure 9.19 CC email addresses –selection box



You can

- ✓ Setup and delete CC email addresses,
- ✓ Search for stored CC email addresses,
- ✓ Add a CC email address as recipient to the send job.

Figure 9.20 CC email addresses – new entry

## 10 Outgoing and incoming tab

On the **Outgoing** and **Incoming** tabs you can manage your send and receive jobs, i.e. you can

- ✓ Query information about jobs,
- ✓ Download sent and received files ,
- ✓ Send and receive files again or forward them ,
- ✓ Search for jobs (search template).

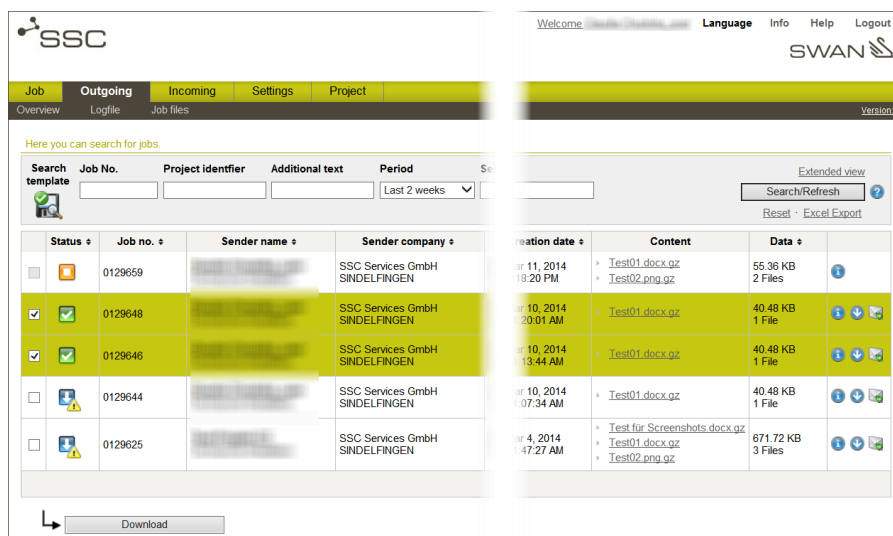
- Activate the **Outgoing** tab.

» The outgoing list is displayed as overview of all sent jobs.

or

- Activate the **Incoming** tab.

» The incoming list is displayed as overview of all received jobs.



Status	Job no.	Sender name	Sender company	Creation date	Content	Data
<input type="checkbox"/>	0129659	SSC Services GmbH	SINDELFINGEN	Mar 11, 2014 18:20 PM	Test01.docx.gz Test02.png.gz	55.36 KB 2 Files
<input checked="" type="checkbox"/>	0129648	SSC Services GmbH	SINDELFINGEN	Mar 10, 2014 10:01 AM	Test01.docx.gz	40.48 KB 1 File
<input checked="" type="checkbox"/>	0129646	SSC Services GmbH	SINDELFINGEN	Mar 10, 2014 13:44 AM	Test01.docx.gz	40.48 KB 1 File
<input type="checkbox"/>	0129644	SSC Services GmbH	SINDELFINGEN	Mar 10, 2014 07:34 AM	Test01.docx.gz	40.48 KB 1 File
<input type="checkbox"/>	0129625	SSC Services GmbH	SINDELFINGEN	Mar 4, 2014 4:27 AM	Test für Screenshots.docx.gz Test01.docx.gz Test02.png.gz	671.72 KB 3 Files

Figure 10.1

Example - Outgoing list

## 10.1 Query information about jobs

### 10.1.1 Select job via status icon

On the views

- ✓ Overview
- ✓ Logfile
- ✓ Job files

You find information about a job that you have selected before.

- Double click on the status icon of the desired job.
  - » The **Overview** is displayed.
  - » Activate the **Logfile** or **Job files** view to display further information.
  - » The selected job is highlighted **pink** in the outgoing and incoming list.



#### Info

The information from the views **Overview**, **Logfile** and **Job files** cannot be queried until the job has been selected. The selection is made through double click on the Status icon or by clicking on **Job details** under job information.

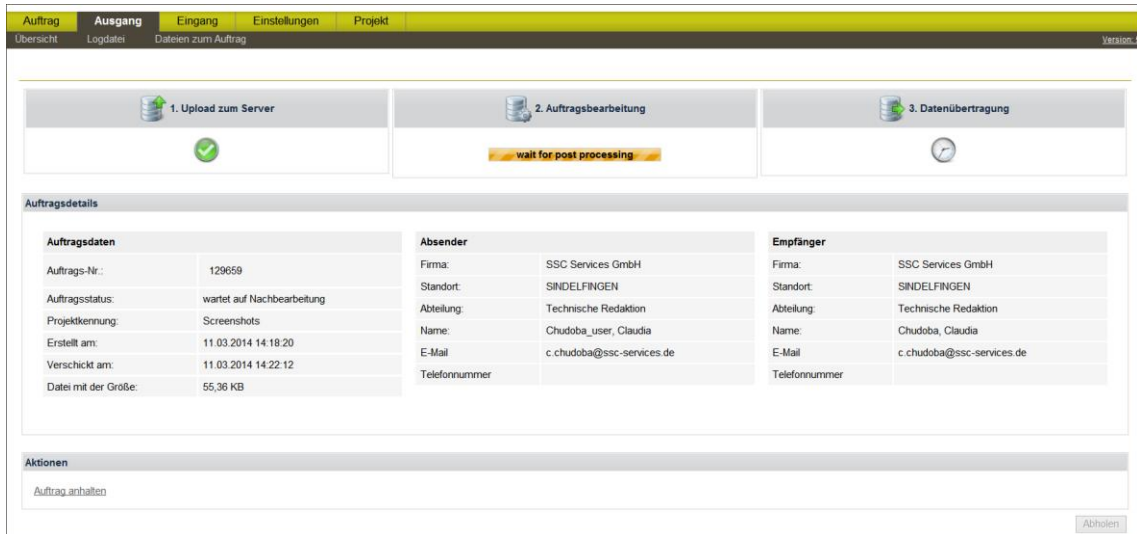
- » The **Overview** is displayed.
- » The selected job is highlighted **pink** in the outgoing and incoming list.

The checkbox in the first column of the job lists is only used to select the jobs for downloading.

- » Jobs for download are highlighted (coloured) and the checkmark is set.

Information is only displayed for the pink highlighted job.

---



**Auftrag** Ausgang Eingang Einstellungen Projekt

Übersicht Logdatei Dateien zum Auftrag Version: 5

1. Upload zum Server 2. Auftragsbearbeitung 3. Datenübertragung

wait for post processing

**Auftragsdetails**

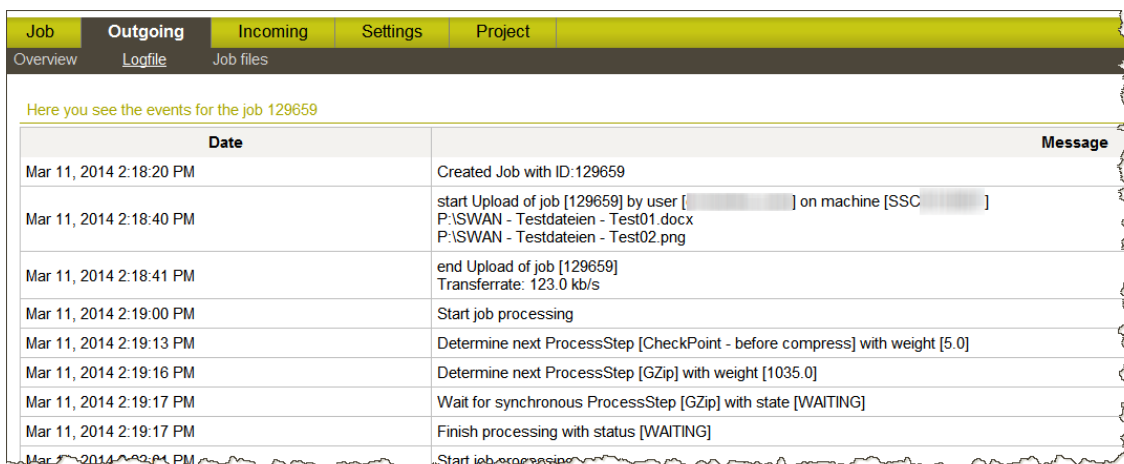
Auftragsdaten		Absender		Empfänger	
Auftrags-Nr.:	129659	Firma:	SSC Services GmbH	Firma:	SSC Services GmbH
Auftragsstatus:	wartet auf Nachbearbeitung	Standort:	SINDELFINGEN	Standort:	SINDELFINGEN
Projektkennung:	Screenshots	Abteilung:	Technische Redaktion	Abteilung:	Technische Redaktion
Erstellt am:	11.03.2014 14:18:20	Name:	Chudoba, Claudia	Name:	Chudoba, Claudia
Versickt am:	11.03.2014 14:22:12	E-Mail:	c.chudoba@ssc-services.de	E-Mail:	c.chudoba@ssc-services.de
Datei mit der Größe:	55,36 KB	Telefonnummer:		Telefonnummer:	

**Aktionen**

Auftrag anhalten

Abholen

Figure 10.2 View - Overview



**Job** Outgoing Incoming Settings Projekt

Overview Logfile Job files

Here you see the events for the job 129659

Date	Message
Mar 11, 2014 2:18:20 PM	Created Job with ID:129659
Mar 11, 2014 2:18:40 PM	start Upload of job [129659] by user [ ] on machine [SSC ] P:\SWAN - Testdateien - Test01.docx P:\SWAN - Testdateien - Test02.png
Mar 11, 2014 2:18:41 PM	end Upload of job [129659] Transferrate: 123.0 kb/s
Mar 11, 2014 2:19:00 PM	Start job processing
Mar 11, 2014 2:19:13 PM	Determine next ProcessStep [CheckPoint - before compress] with weight [5.0]
Mar 11, 2014 2:19:16 PM	Determine next ProcessStep [GZip] with weight [1035.0]
Mar 11, 2014 2:19:17 PM	Wait for synchronous ProcessStep [GZip] with state [WAITING]
Mar 11, 2014 2:19:17 PM	Finish processing with status [WAITING]
Mar 11, 2014 2:19:17 PM	Start job processing

Figure 10.3 View - Logfile

Job	Outgoing	Incoming	Settings
Overview	Logfile	Job files	


  

Here you see all files of the job 129659				
File name	Content	Creation date	File Size	Format
<a href="#">Test01.docx.gz</a> ENG14031114182000282003002	<ul style="list-style-type: none"><li>▸ [Content_Types].xml [XML]</li><li>▸ _rels/.rels [XML]</li><li>▸ docProps/app.xml [XML]</li><li>▸ docProps/core.xml [XML]</li><li>▸ docProps/thumbnail.emf [unknown]</li></ul>	Mar 11, 2014 2:20:07 PM	40.48 KB	GZIP
<a href="#">Test02.png.gz</a> ENG14031114182000282003003	<ul style="list-style-type: none"><li>▸ word/theme/theme1.xml [XML]</li><li>▸ word/webSettings.xml [XML]</li></ul>			
	<ul style="list-style-type: none"><li>▸ OutFile_5b4Y5H71M [unknown]</li></ul>	Mar 11, 2014 2:20:07 PM	14.88 KB	GZIP

Generated delivery note: [deliveryNote\\_000129659\\_de.pdf](#)

Figure 10.4 View - Job files

### 10.1.2 Select Job through info icon

You can query different information about your job through the info icon  in the last column of the job lists.



#### Info

The information from the views **Overview**, **Logfile** and **Job files** cannot be queried until the job has been selected.

The selection is made through double click on the Status icon or by clicking on **Job details** under job information.




» The **Overview** is displayed.

» The selected job is highlighted **pink** in the outgoing and incoming list.

The checkbox in the first column of the job lists is only used to select the jobs for downloading.

» Jobs for download are highlighted (yellow) and the checkmark is set.

Information is only displayed for the pink highlighted job.

- Click on  in the incoming list.
  - » The view **Job information** is displayed.
  - » Navigate to the next or previous job with the arrow buttons  .
- Click on **Job details** for detailed information.
  - » The **Overview** is displayed.
  - » Activate the views **Logfile** or **Job files** to display further information.
  - » The selected job is highlighted **pink** in the outgoing and incoming list.

**Job information**

✓ Job 129646 - finished Job details Download

Info Additional information

Job data		Sender		Recipient	
Project:	Screenshots	Company:	SSC Services GmbH	Company:	SSC Services GmbH
Created:	Mar 10, 2014	Site:	SINDELFINGEN	Site:	SINDELFINGEN
at:	11:13:44 AM	Department:	Technische Redaktion	Department:	Servicedesk
Sending date:	Mar 10, 2014	Name:	[REDACTED]	Name:	[REDACTED]
at:	11:17:24 AM	E-mail	[REDACTED]	E-mail	[REDACTED]
		Phone		Phone	

File name	Format	File Size
<a href="#">Test01.docx.gz</a>	GZIP	40.48 KB
<b>Number of files: 1</b>		<b>40.48 KB</b>

Figure 10.5 Example - Job information

## 10.2 Identify job status

The small coloured square in front of every job displays the current status. A mouse-over on the icon shows information about the meaning of the icon. The following table shows a selection of the most used icons.

### 10.2.1 Job status of the outgoing list








Job status	Description
 <b>finished</b>	Job has been transferred to the recipient successfully.
 <b>waiting / processing</b>	Job is being processed / sent.
 <b>created</b>	Job has been created, the data is uploaded by CFM
 <b>downloaded</b>	Job has been downloaded by the sender. You can download a job several times during the agreed provision period.
 <b>stopped</b>	Job has been stopped.
 <b>failed</b>	Job has run on error during processing. Please contact the Service Desk.
 <b>deleted</b>	Job has been deleted

Table 10.1 Job status – icons outgoing list



### 10.2.2 Jobs status of the incoming list







Job status	Description
 <b>ready for download</b>	Job is ready for download from the incoming list during the agreed provision period.
 <b>processing</b>	Job is being processed
 <b>downloaded</b>	Job has been downloaded by the recipient. You can download a job several times during the agreed provision period.
 <b>stopped</b>	Job has been stopped.
 <b>failed</b>	Job has run on error during processing. Please contact the Service Desk.
 <b>deleted</b>	Job has been deleted



Table 10.2 Job status – icons incoming list

## 10.3 Using search mask

In the list of send and receive jobs you can search for general criteria in the **Simple view** and for special criteria in the **Extended view**. Here you can also create a search template.



#### Info

A search template which is already active is tagged with the icon ( instead of ). The name of the active search template can be seen through mouse-over.

- Select the desired view.
- Enter the search criteria.
- Click on **Search/Refresh**.
  - » A list with the search results is displayed.

### 10.3.1 Search mask - Simple view

In the **Simple view** search mask you can search for the following general criteria:

- Job number
- Project identifier
- Additional text

- Period
  - Sender  
(First name, last name, user name, project name, department, location and company of the sender)
  - Recipient  
(First name, last name, user name, project name, department, location and company of the sender)
  - Files (file name)
- Click on **Simple view**.
  - Enter the search criteria.
  - Click on **Search/Refresh**.
    - » A list with the search results is displayed.

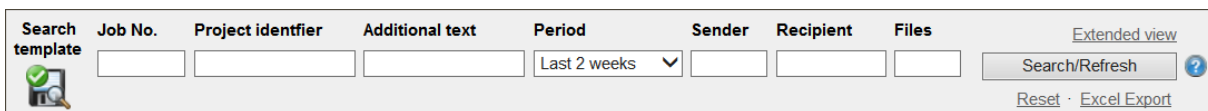


Figure 10.6 Search mask - Simple view

**Info – search mask input**

You get an overview of the input possibilities by mouse-over on the search field description.

**10.3.2 Search mask - Extended view**

In the extended view of the search mask you can search for the following additional criteria:

- ✓ Status
- ✓ Job type
- ✓ Archiving status

- Click on **Extended view**
- Enter the search criteria.
- Click on **Search/Refresh**.


» A list with the search results is displayed.



Figure 10.7 Search mask - Extended view

### 10.3.3 Create search template

You can save search criteria in a search template for recurring search processes.

- Enter the desired search criteria into the search mask of the simple or extended view and click on **Search/Refresh** to start the search.
- Click on  to save the search criteria.
  - » The selection box **Search templates** is displayed.
  - » Stored search templates are displayed.
- Choose an appropriate name for the search template and click on **Save**.

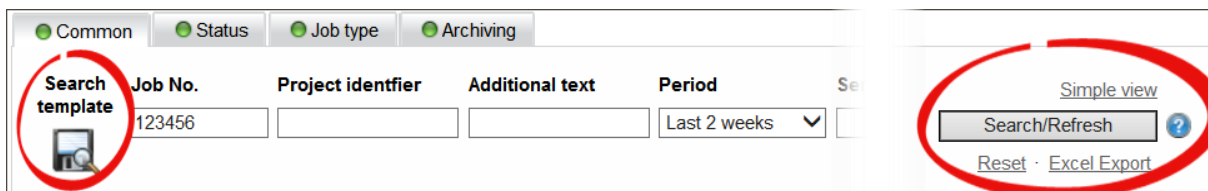


Figure 10.8 Save search template [1]

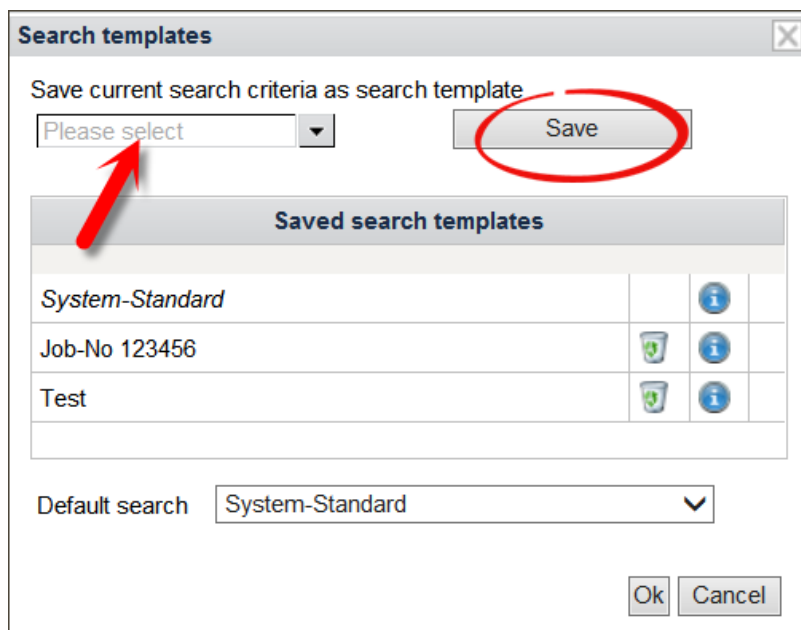




Figure 10.9 save search template [2]






#### Info

You have to perform a search with the corresponding search criteria before you're able to store the search template.


### 10.3.4 Activate search template

You can use stored search templates for searching. A search template that is already active is indicated by the change icon ( instead of .

- Click on  or  to select a stored search template.
  - » The selection box **Search templates** is displayed.
  - » Search templates that are already stored are displayed.
- Click on the search template you wish to select.
- Click on  to show information on the search template.
- Click on **OK** to start the search process.

### 10.3.5 Reset search template

You can clear the applied search criteria and disable the active search template.

- Click on **Reset**.
  - » The search criteria will be deleted.
  - » The active search template will be disabled.
  - » The icon of the search template is changed to .

## 10.4 Export job lists

You can export the job lists as Excel file.

- Click on **Excel Export**.
  - » The selection list for the export is displayed.
- Activate the information required for the export.

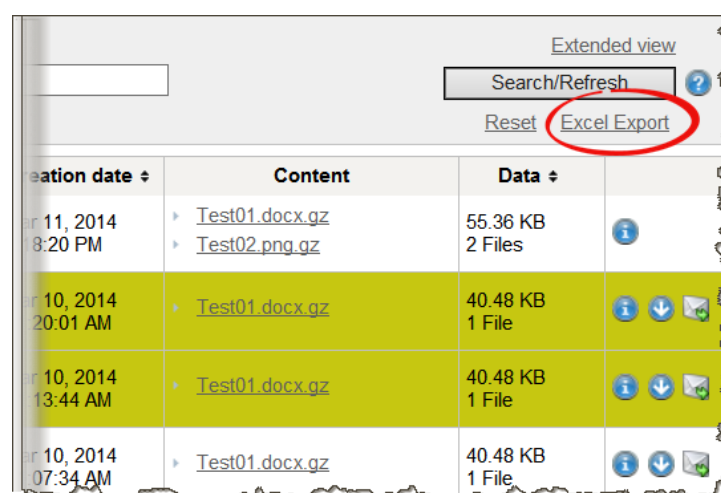
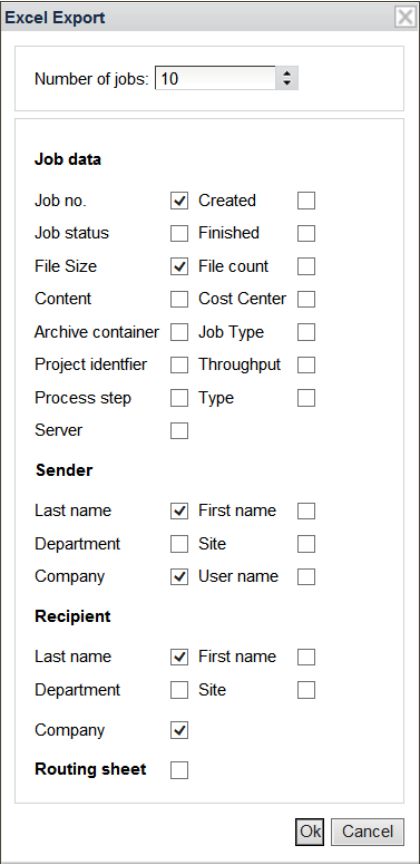


Figure 10.10 Export job lists - Excel Export



The dialog box is titled "Excel Export" and contains the following elements:

- A "Number of jobs:" label followed by a text box containing "10" and a small up/down arrow.
- A section titled "Job data" with the following options:
  - Job no. ☒ Created ☐
  - Job status ☐ Finished ☐
  - File Size ☒ File count ☐
  - Content ☐ Cost Center ☐
  - Archive container ☐ Job Type ☐
  - Project identifier ☐ Throughput ☐
  - Process step ☐ Type ☐
  - Server ☐
- A section titled "Sender" with the following options:
  - Last name ☒ First name ☐
  - Department ☐ Site ☐
  - Company ☒ User name ☐
- A section titled "Recipient" with the following options:
  - Last name ☒ First name ☐
  - Department ☐ Site ☐
  - Company ☒
- A section titled "Routing sheet" with the option:
  - ☐
- At the bottom right, there are "Ok" and "Cancel" buttons.

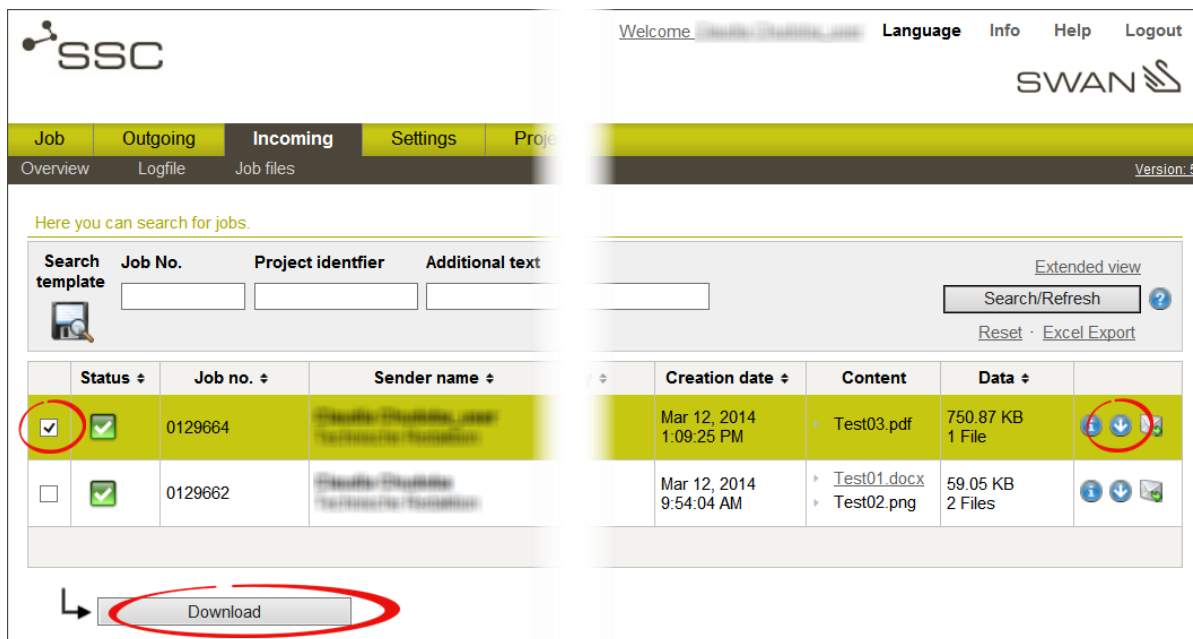
Figure 10.11 Export job lists – select the information

## 10.5 Download files

### 10.5.1 Select incoming job


Data recipients are informed about incoming data via email with a data delivery note and can access the received data through the **Incoming** tab.

- Activate the **Incoming** tab.
- Use the search mask to filter extensive incoming lists for certain criteria.



SSC

Welcome [SWAN - Testdateien](#) Language Info Help Logout

SWAN 

Job Outgoing Incoming Settings Projects

Overview Logfile Job files Version: 5

Here you can search for jobs.

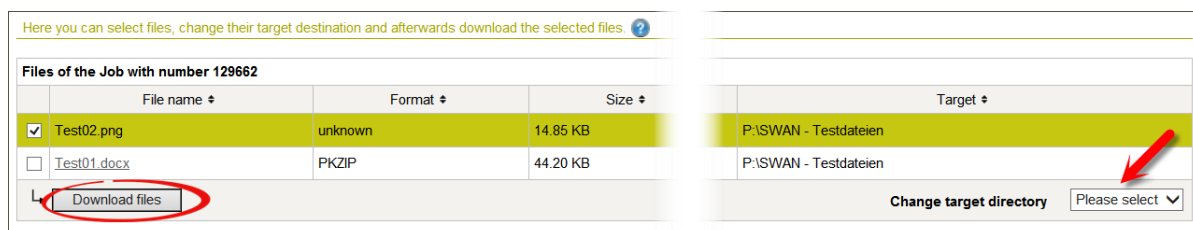
Search template Job No. Project identifier Additional text

Extended view Search/Refresh ? Reset Excel Export

Status	Job no.	Sender name	Creation date	Content	Data
<input checked="" type="checkbox"/>	0129664	SWAN - Testdateien	Mar 12, 2014 1:09:25 PM	Test03.pdf	750.87 KB 1 File
<input type="checkbox"/>	0129662	SWAN - Testdateien	Mar 12, 2014 9:54:04 AM	Test01.docx Test02.png	59.05 KB 2 Files

Download

Figure 10.12 Download files - Incoming list



Here you can select files, change their target destination and afterwards download the selected files. ?

Files of the Job with number 129662

	File name	Format	Size
<input checked="" type="checkbox"/>	Test02.png	unknown	14.85 KB
<input type="checkbox"/>	Test01.docx	PKZIP	44.20 KB

Download files

Target


P:\SWAN - Testdateien

P:\SWAN - Testdateien

Change target directory Please select

Figure 10.13 Download files - selection

### Download single jobs

- Click on  in the last column to download a single job.
  - » A list of files belonging to the job is displayed.
- Select the desired files.

## Download several jobs

- Select the desired jobs.
- Highlight the jobs in the first column of the job list or click into the lines of the desired jobs.
  - » The selected jobs are highlighted.
- Click on **Download**.
  - » A list of the files belonging to the job is displayed.
- Select the desired files.

## 10.5.2 Select target directory

You can enter a default target directory where the files are stored under the **Settings** tab or you can select the directory in the field **Change target directory**.



### Info - option in SWANenterprise

Besides the opportunity to download your files to the file system in SWANcloud, the product SWANenterprise provides you with the opportunity to download data to e.g. a connected CAD or PLM system. In this case, there are more entries available under **Change target directory**.

- Select the option **Filesystem** under **Change target directory**.
  - » The selection box **Apply** is displayed.
- Select the target directory and click on **Apply**.
- Click on **Download files**.
  - » The files are downloaded into the desired target directory.



### Info

If you click on **Download files** without changing the target, the files will be downloaded to the directory that has been defined as default under **Settings**.



### Info - Client Side File Manager (CFM)

The upload and download of data in SWAN is executed by **Client Side File Manager (CFM)**.

- Please find information about the use of CFM in the attachment of this document.

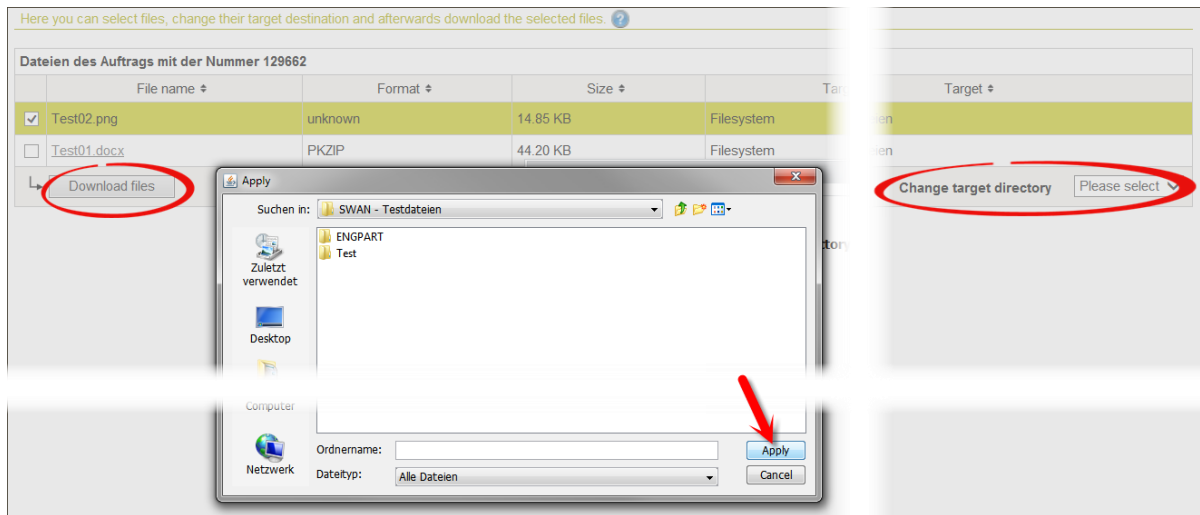


Figure 10.14 Download files - select target directory

Depending on the selected default setup under **Settings** (dialogue, never, always), a dialogue box is displayed when you download a ZIP or TAR file, asking if the container (ZIP or TAR) shall be unpacked.

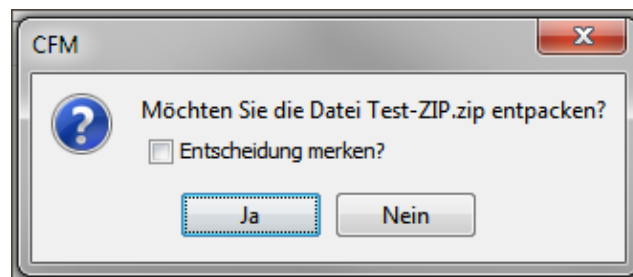


Figure 10.15 Dialogue on ZIP or TAR file



## 11 Project tab



### Project function info

The **project function** enables you to send out data in the name of a project.

The field **From:** is only displayed if you are assigned to a project.

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

Via the link '**Welcome [registered user]**', you can see whether you are a project manager in the **Permissions** area.

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

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

If files are sent to a project, the job appears for all project members in the incoming list.



### Information

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

- Enter the required presets here.

New EDI Job	
From: *	Test-Projekt-CC
To: *	
CC email:	
Project:	
Additional text:	Test

Figure 11.1 Job tab – Project sender

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

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

If files are sent to a project, the job appears for all project members in the incoming list.

Projects are logically linked to servers.

A user requires the business role **project definition** to create and manage projects. The system administrator assigns this role in the user admin area.

Depending on your role in the project, you can do the following for projects in which you are a member (**My Projects**): Search for projects, edit projects, create new projects and assign users as project members to a project.

There are the following roles within a project:

- The system administrator has unrestricted administration rights for all projects. He/she assigns the business role **project definition** to the person responsible for the project.
- The person who is **responsible** for the project has unrestricted administration rights for his/her project (mandatory, 1 person). The person who is responsible for the project cannot be deleted from the project.
- The project **deputy** can accept members into the project or remove members from it (optional, multiple persons possible).
- A project **member** has no administration rights (optional, multiple persons possible).

## 11.1 Search project – Edit project



### Information

If you do not enter any search criteria for your search, you will receive all existing entries as a result.

You can use the following as search criteria:

- Project name      A project has a name and its own address code.
  - Member      A project is assigned to at least one user (the person  
name/member      responsible for the project).  
first name
- Activate the **Project** tab.
  - Enter your search criteria and start the search by clicking on **Search** or click on **My Projects**.
    - » The search results appear.

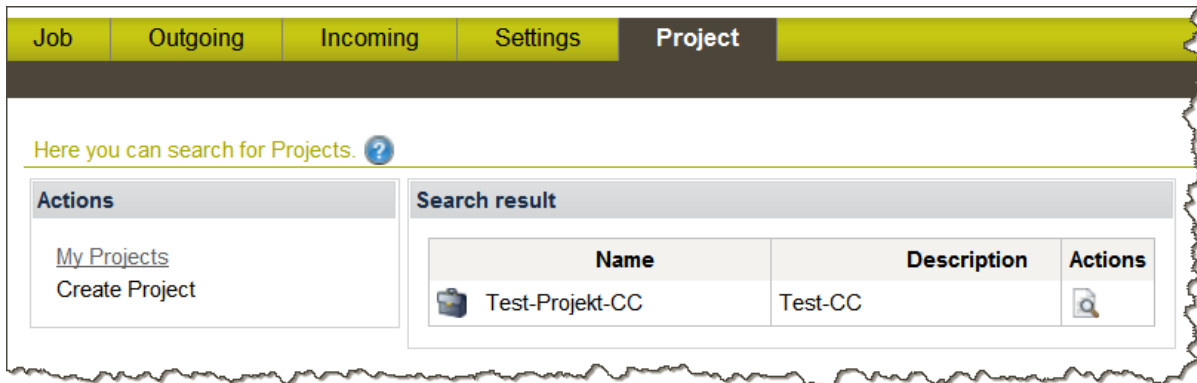


Figure 11.2 Project tab – Search result – My Projects

- Select the required entry.

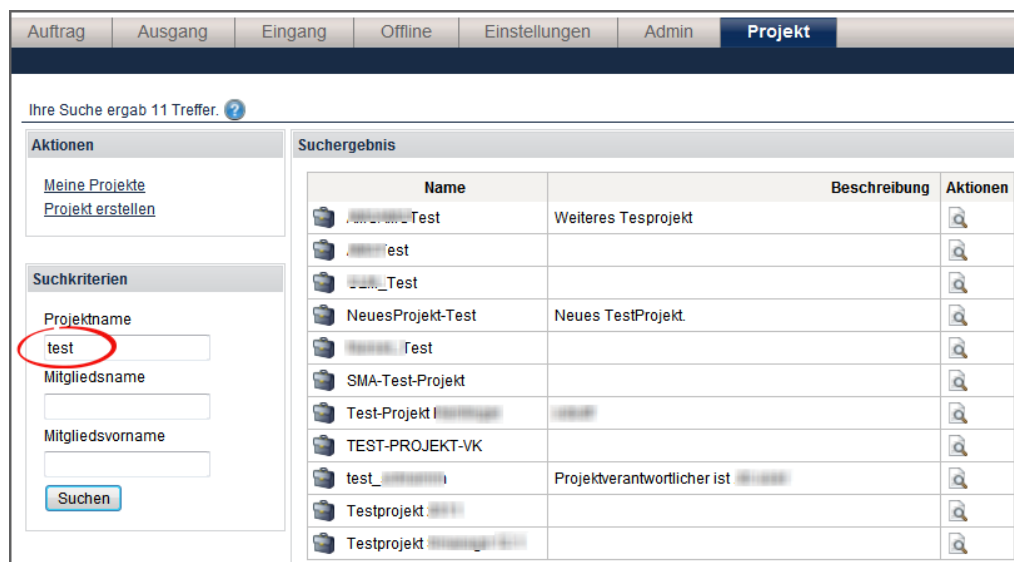



Figure 11.3 Project tab – Search project

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

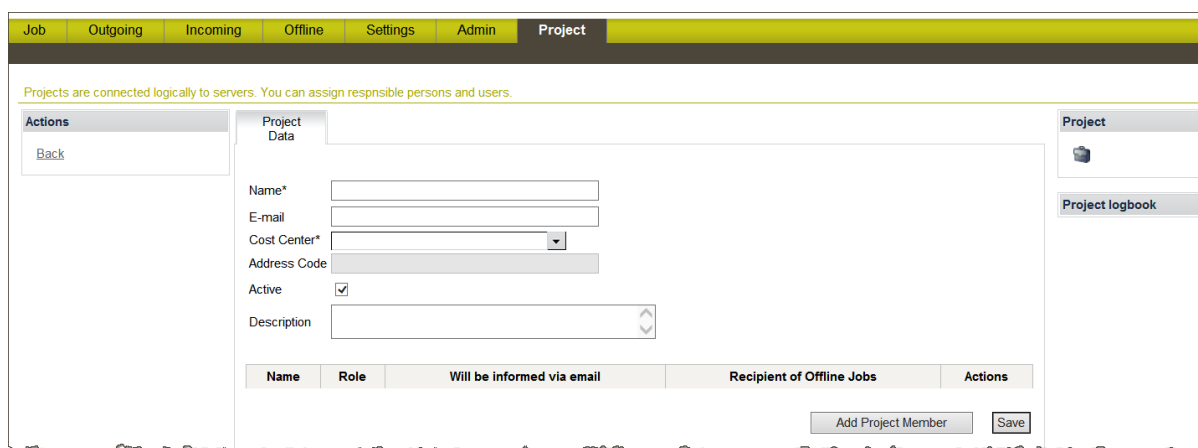


Figure 11.4 Project tab – Project data

## 11.2 Creating a project

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

This business role is assigned by the System Administration.

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

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

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

**Actions**  
[Back](#)

**Project Data**  
  
Name\*   
E-mail   
Cost Center\*   
Address Code   
Active ☒  
Description   

Name	Role	Will be informed via email	Recipient of Offline Jobs	Actions
Maximilian Mustermann	<div>Please select Responsible person Deputy Member</div>	<input type="checkbox"/>	<input type="checkbox"/>	

Figure 11.5 Project tab – Add project member

## 12 Logout

You shouldn't just close the browser window when your work with SWAN is finished.

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



Figure 12.1 Logout

## Annex: CFM - Client Side File Manager

### 1 Introduction

The upload and download of files in SWAN is executed by CFM - Client Side File Manager.

Upon the initial start (sending or receiving the first job in SWAN), CFM will set up required files in a temporary directory on your computer.

Under WindowsXP:

**C:\Documents and Settings\[USER-ID]\Local Settings\Temp\[USER-ID]\cfm**

Under Windows7:

**C:\Users\[USER-ID]\AppData\Local\Temp\[USER-ID]\cfm**



#### Info - Client Side File Manager (CFM)

The configuration of CFM could take several minutes for the first job.

---

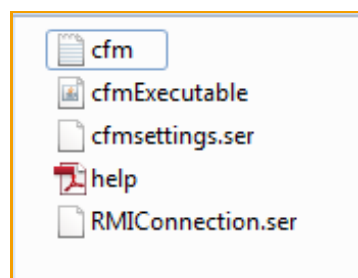


Figure A 1 CFM - files

### 2 CFM main view

#### 2.1 File

On the **File** tab you can **Minimize CFM To Task Bar** or **Exit**.

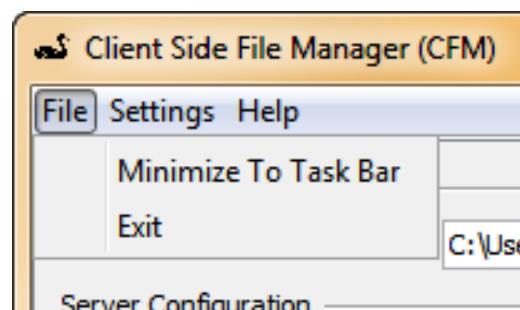


Figure A 2 CFM – main view File

## 2.2 Settings

On the **Settings** tab in the main view of CFM you can make different settings on the configuration of the client and the proxy server.

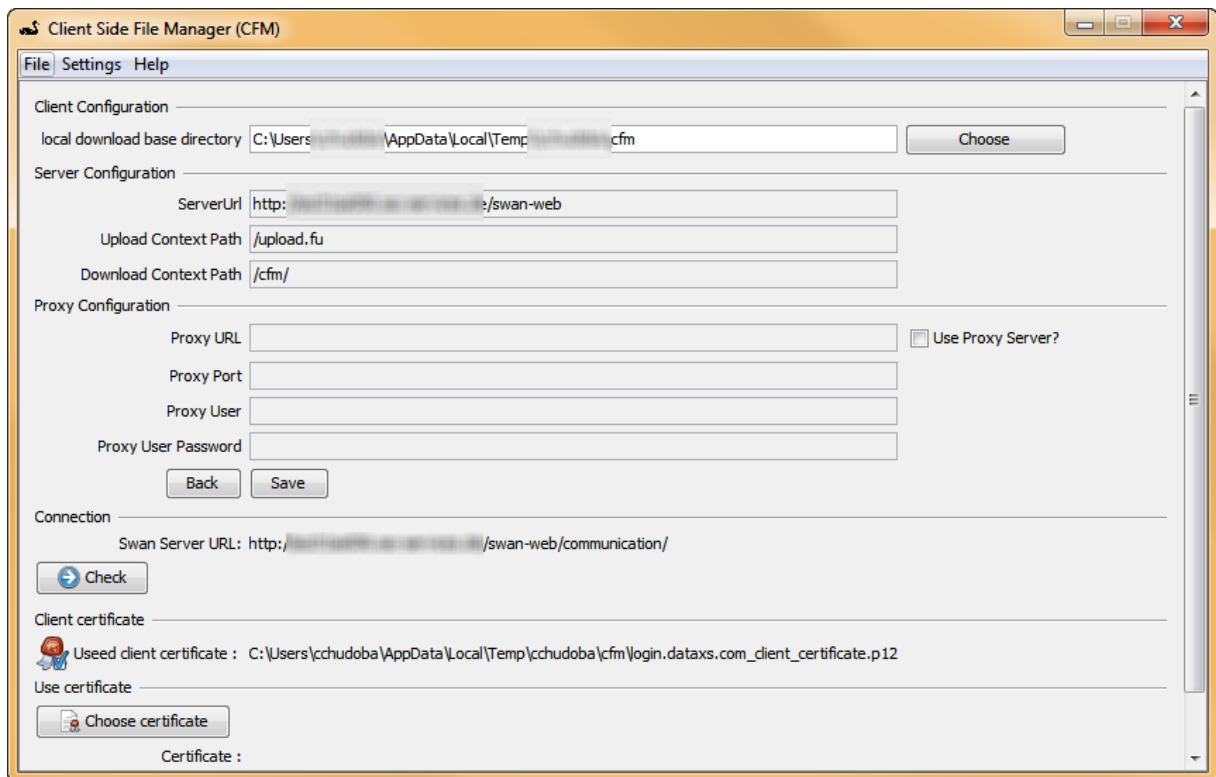


Figure A 3 CFM – Settings tab



### Info - Client Side File Manager (CFM)

If your company uses an automatic proxy configuration script, please contact your local administrator. The port 443 must be opened.


## 2.3 Help

The CFM manual can be opened under the **Help** tab.

## 3 Uploading files with CFM

As soon as you complete the job creation with **Send job**, CFM is started in the background.

- Click on **Send job**.

» The **SWAN-Icon**  is displayed in the task bar and CFM starts to upload the job onto the server.



## 4 Track upload/download process

### 4.1 Job overview

CFM allows you to track the status of the upload and download process.

- Double-click on the **SWAN-Icon** in the task bar.
  - » A window with information on the job is displayed.

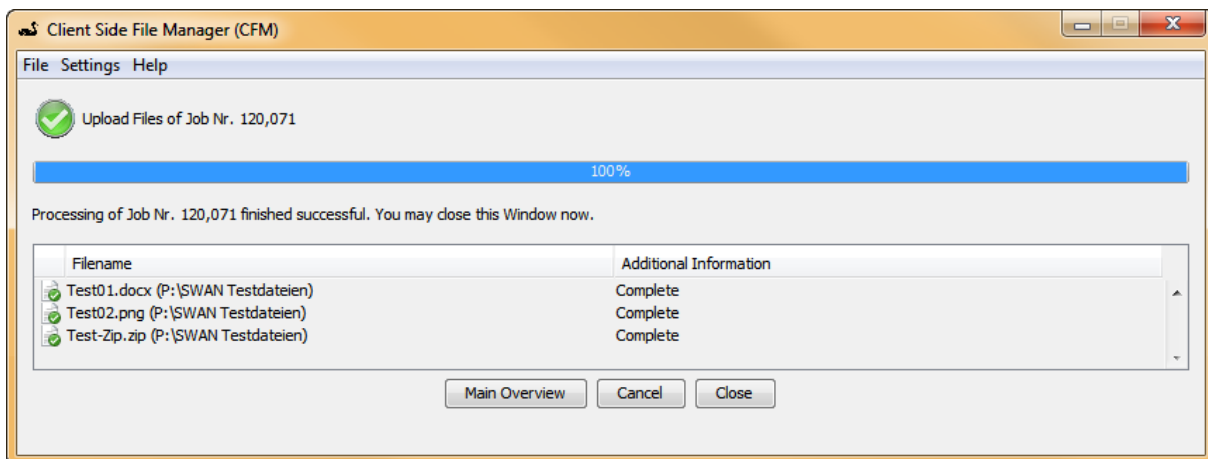


Figure A 4 CFM - Example: upload information on job

- Click on **Main Overview**, to access an overview of all transfer jobs.

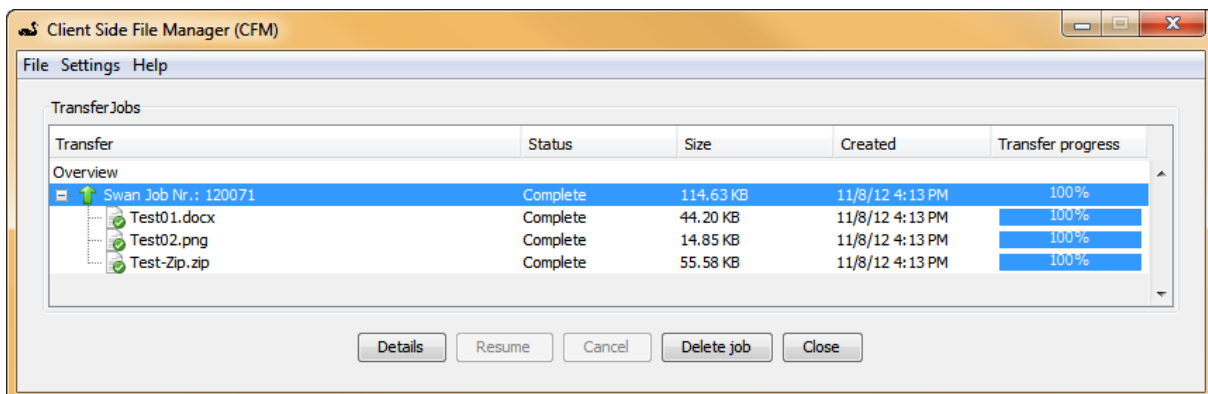


Figure A 5 CFM – main overview of transfer jobs



#### Info - Client Side File Manager (CFM)

You can show or hide files that belong to the job in order to get specific information, e.g. transfer progress.

Name	Description
Transfer	Overview of selected files
Status	Status of the transfer job (download, error, cancelled, processing, complete)
Size	Size of the file
Created	Date and time
Transfer progress	Status display on the transfer progress

Figure A 6 CFM – main overview information

## 4.2 Query details on transfer job

You can query details on a specific transfer job and request support through the Service Desk in case of errors.

- Select a transfer job.
- Click on **Details** for further information.
  - » A window with the transfer information of the job is displayed.

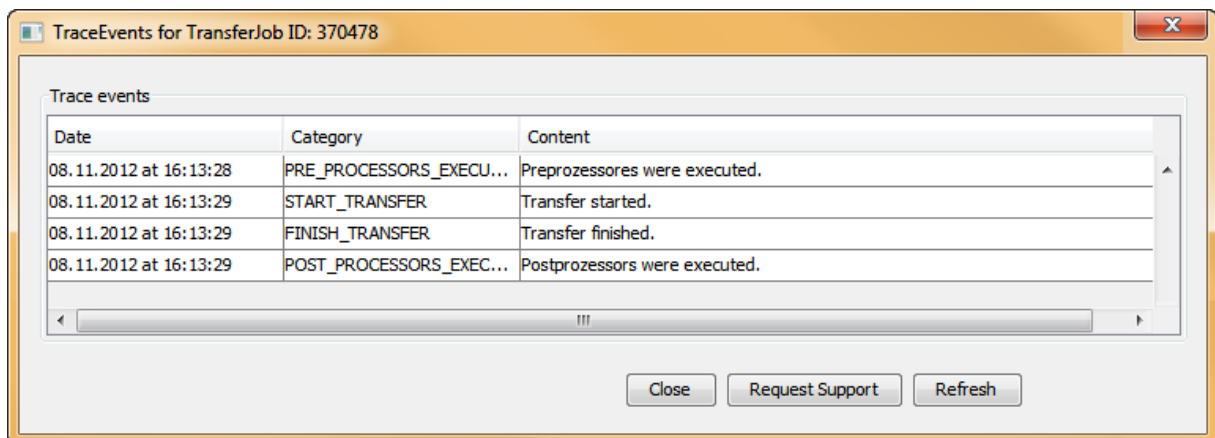


Figure A 7 CFM – transfer information

If you have any problems with the transfer (e.g. an unexpected connection breakup) you can request support through our Service Desk under the detail view.

- Click on **Details** of the transfer job where an **Error** status is displayed.
  - » A window with the transfer information of the job is displayed.
- Click on **Request Support**.
  - » An automatic support request will be sent to the Service Desk.

### 4.3 Clear list of transfer jobs

- Select a transfer job.
- Click on **Delete**.

### 4.4 Cancel transfer job

If you have accidentally selected the wrong job for download you can cancel the transfer.

- Select a transfer job.
- Click on **Cancel**.
  - » The status of the job is changed to **Error**.

### 4.5 Resume transfer job

If the transfer is interrupted (e.g. manually cancelled or connection breakup due to network problems) you can resume the transfer.

- Select a transfer job.
- Click on **Resume**.
  - » The transfer of the job is resumed.

## 5 Download data with CFM

Likewise to uploading data to the SWAN server, CFM executes the download of data.

The files are transferred decrypted. CFM decodes this data in the background by means of a key and provides the decrypted data to the specified target directory.

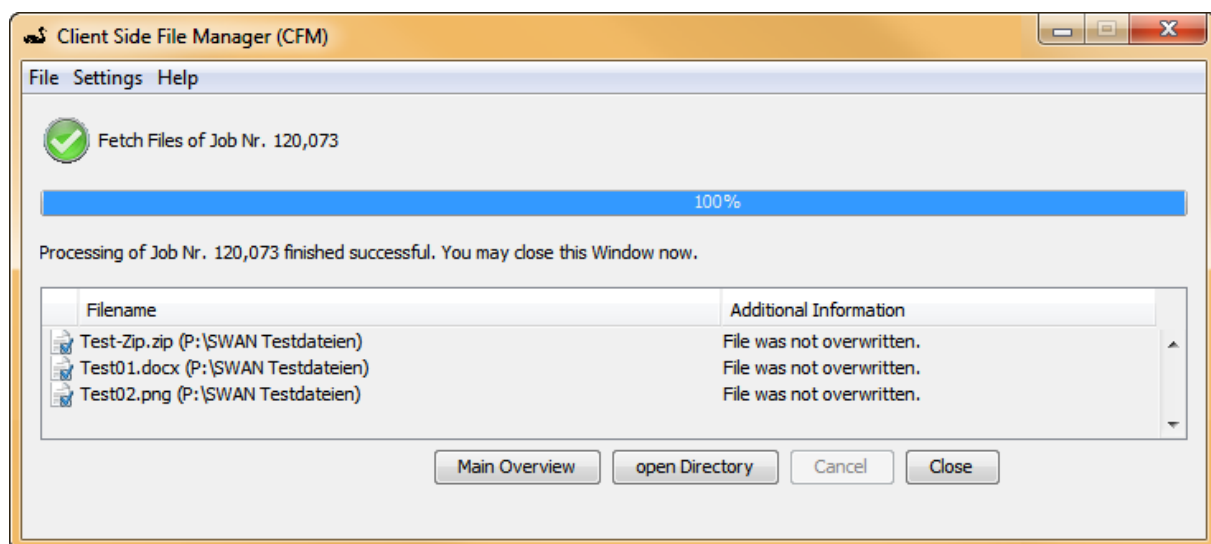


Figure A 8 CFM – download information on Job

CFM checks if the job contains ZIP or TAR archives and supports you with the unpacking process.

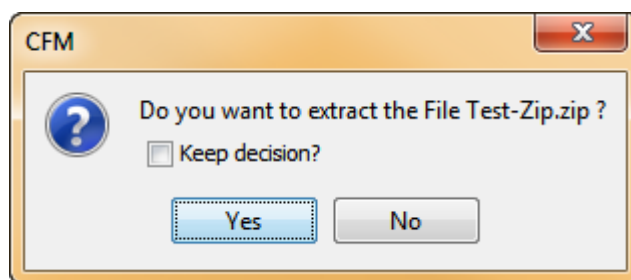


Figure A 9

CFM – unpack archives

As soon as the files have been processed by CFM, the status is changed to **Complete**. The files are stored in the specified target directory.

- Click on **Open directory** to get to the specified folder.