



# **SWANenterprise - SWANcloud**

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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 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:

- ActiveX control elements and plug-ins
- Session cookies
- JavaScript enabled
- Java plug-in from version 6 update 27 (1.6.0\_27) or higher
- 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 1280x800 pixel
  - ⇒ The application of SWAN on smartphones, netbooks or tablets is not possible or only possible to a limited extend.

### 3 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.

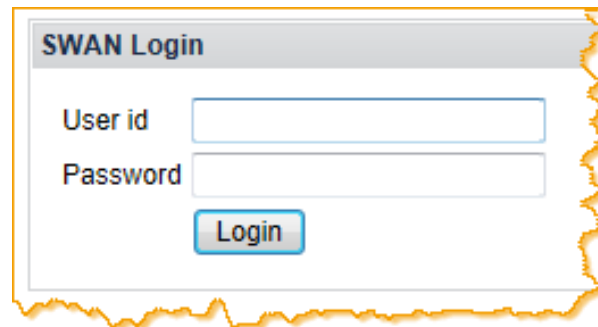
A screenshot of the SWAN Login web form. The form has a title bar that says "SWAN Login". Below the title bar, there are two input fields: "User id" and "Password". Below the "Password" field is a blue "Login" button. The entire form is enclosed in a white box with a yellow border and a torn paper effect on the right side.

Figure 3.1

SWAN Login

## 4 Select the language of the program interface



Figure 4.1

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

- 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.

## 5 Help and support for problems

### 5.1 Online manual and online help

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

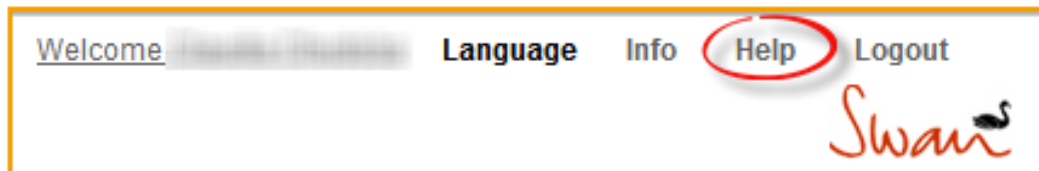




Figure 5.1 Help - SWAN online help

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

### 5.2 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.

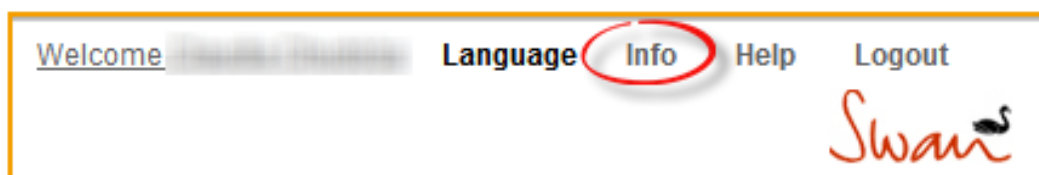


Figure 5.2 Info – support area on the SSC homepage

### 5.3 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

Tilsiter Str. 1

71065 Sindelfingen

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

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

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



## 7 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

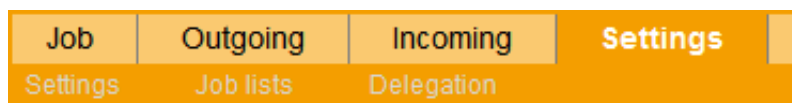


Figure 7.1 Settings tab

### 7.1 Settings menu

The image shows a 'SWAN Settings' window with a title bar and a menu bar. The menu bar has tabs for 'Job', 'Outgoing', 'Incoming', 'Settings', and an unlabeled tab. Below the menu bar, there is a section titled 'Display of the current SWAN settings' with a help icon. The main content area is titled 'SWAN Settings' and contains several sections: 'General SWAN settings' with fields for '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), and 'Language' (English); 'Receive setting' with fields for 'Default Target Directory' (P:\SWAN Testdateien), 'Extract ZIP/TAR file when receiving?' (dialogue), and 'Receive directory as default' (yes); 'Send settings' with fields for 'Default additional text' (Test), 'Default Send path' (P:\SWAN Testdateien), 'Additional text' (yes), 'Default project' (Tests), and 'Project identifier' (yes). At the bottom right, there are 'Save' and 'Cancel' buttons.

Figure 7.2 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
Timezone	Timezone of the server location. Example: Location Germany ⇒ Europe/Berlin
Startpage after login	Select which tab shall be activated after the login: Job – Outgoing - Incoming - Offline (only in SWANenterprise).
Default recipient	The default recipient is entered into the To: field for news jobs.
Number of jobs per page	Define how many jobs are displayed per page.
Font size	Font size of the user interface.
Language	Language of the user interface.
Default additional text	Enter the text that shall be sent to the data recipient in new jobs.
Default Send path	Select a directory, which is used as default when selecting files for sending.
Additional text	Switch on / off the use of a default additional text for a new send job.
Standard project	Enter a project identifier, which is transmitted to the data recipient in a new job.
Project identifier	Switch on / off the use of a project identifier in a new job.
Default Target Directory	Select a directory, which is used as default when storing received files.
Extract ZIP/TAR file when receiving?	Set up how to process received ZIP/TAR files.
Receive directory as default	Switch on / off the use of a default receive directory.

Table 7.1

SWAN settings – most used options



## 7.2 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"/>
AppId/Process step	<input type="checkbox"/>	AppId/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

Figure 7.3

Settings &gt; Job lists

## 7.3 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**.

User	Read	Download	CC email	Valid until (incl.)	Actions
...	<input checked="" type="checkbox"/>	<input type="checkbox"/>	<input type="checkbox"/>	unlimited	
...	<input type="checkbox"/>	<input checked="" type="checkbox"/>	<input type="checkbox"/>	Nov 29, 2012	

Figure 7.4

Settings > Delegation

## 8 Job tab

On the job tab you can create and send jobs.

- Activate the **Job** tab.

Figure 8.1 Job tab

### 8.1 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
To:	Recipient of the data
CC email	Recipients who shall be informed about the data transmission
Project	Project identifier
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 8.1 New job – description of the input fields



#### 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.

### 8.1.1 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 5 recipients)
- Quick search
- Selection via search mask

#### Quick selection

SWAN stores the last 5 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 8.2

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.

**New EDI Job**

To: must

CC email:

Project:

Additional text:

Name	User name
Mustermann, Martin	
Mustermann, Max	
Mustermann, Maximilian	max.musterman
Mustermann, Max	
Mustermann, Peter	
Mustermann, Werner	
Mustermann, Werner	

Figure 8.3 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**.

**New EDI Job**

To:

CC email:

Project:

Additional text:

Data:

**Select Recipient**

Directory: Local server

Name: Project:

Company: Department:

Figure 8.4 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.

Figure 8.5 Recipient selection - Search mask (2)

## 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**.

Name	Company	Site	Department	Supplier num
Mustermann, Martin	Test Firma	TEST	Testabteilung	Muenchen

Figure 8.6 Recipient selection - Search mask (3)

## 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.

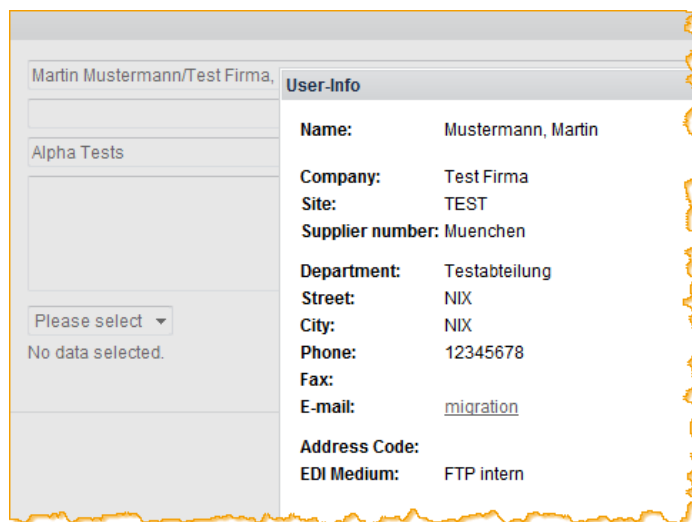


### Info

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.



Martin Mustermann/Test Firma,	
Alpha Tests	
Please select ▼	
No data selected.	
<b>User-Info</b>	
<b>Name:</b>	Mustermann, Martin
<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 8.7

Recipient selection - query recipient details

## Finish recipient selection

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

### 8.1.2 Select data from the filesystem

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

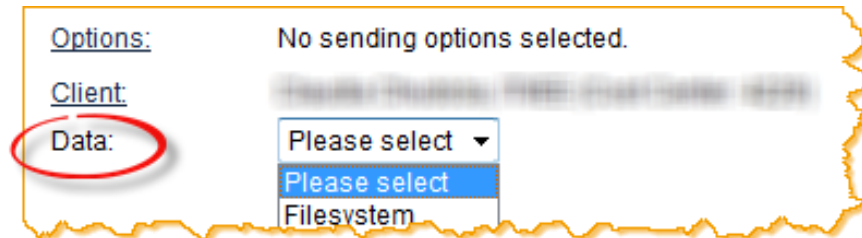


Figure 8.8 Selecting the send directory



#### 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**.

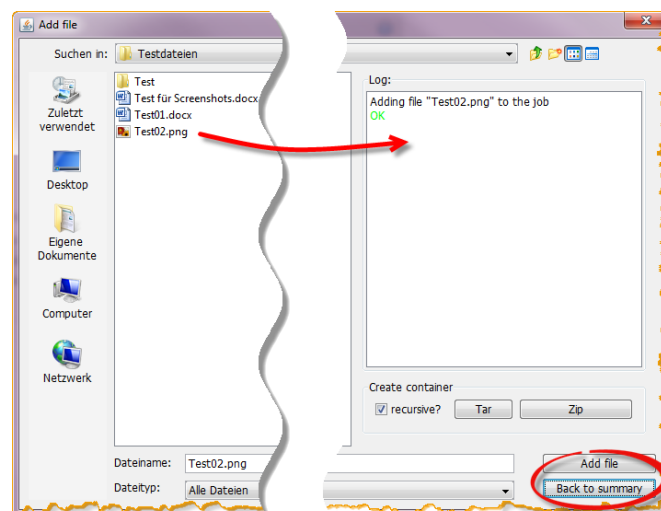


Figure 8.9 Selecting data from the filesystem

- 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.

### 8.1.3 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.

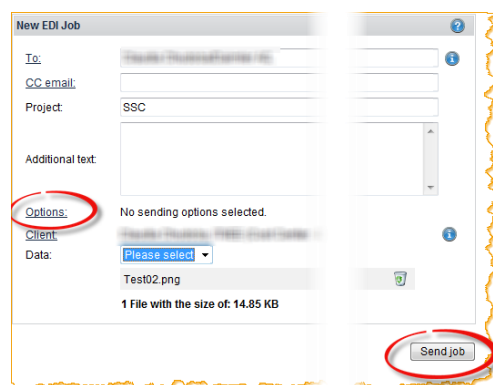


Figure 8.10 Sending options in SWANenterprise

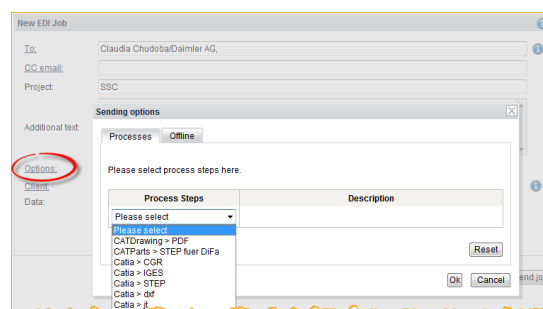


Figure 8.11 Process steps in SWANenterprise

- Activate the tab **Processes**.
- Select the desired process step.
- Click on **OK**.
- Click on **Send job**.



#### 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.

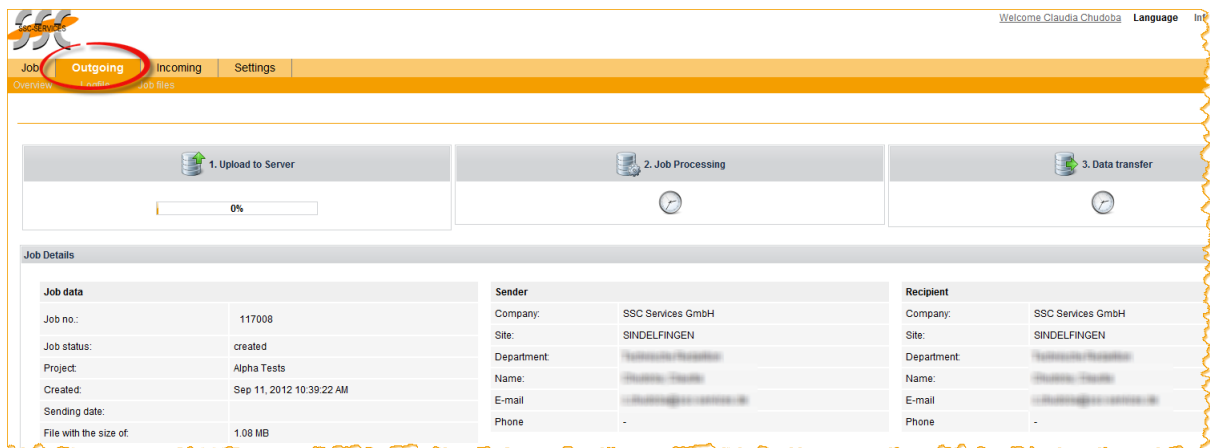
A conversion (e.g. CATIA ⇒ JT) always has to be made prior to a compression (TAR or ZIP).

- Consider the order when selecting the process steps.

### 8.1.4 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.
- Click on **Logfile** or **Job files** in order to receive further information about your job.



Job data		Sender		Recipient	
Job no.:	117008	Company:	SSC Services GmbH	Company:	SSC Services GmbH
Job status:	created	Site:	SINDELFINGEN	Site:	SINDELFINGEN
Project:	Alpha Tests	Department:	Technische Entwicklung	Department:	Technische Entwicklung
Created:	Sep 11, 2012 10:39:22 AM	Name:	Claudia Chudoba	Name:	Claudia Chudoba
Sending date:		E-mail:	c.chudoba@ssc-services.de	E-mail:	c.chudoba@ssc-services.de
File with the size of:	1.08 MB	Phone:	-	Phone:	-

Figure 8.12

Job details

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.

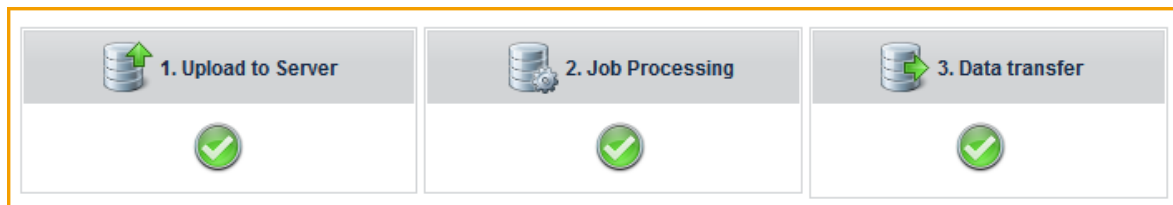


Figure 8.13 Job transferred successfully



#### 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.

### 8.1.5 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.

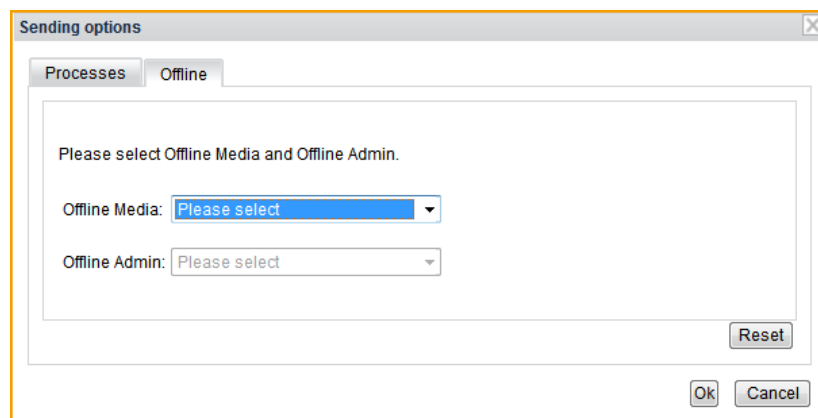


Figure 8.14 Datei-Optionen - Offline

#### 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.

### 8.1.6 Cancel job

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

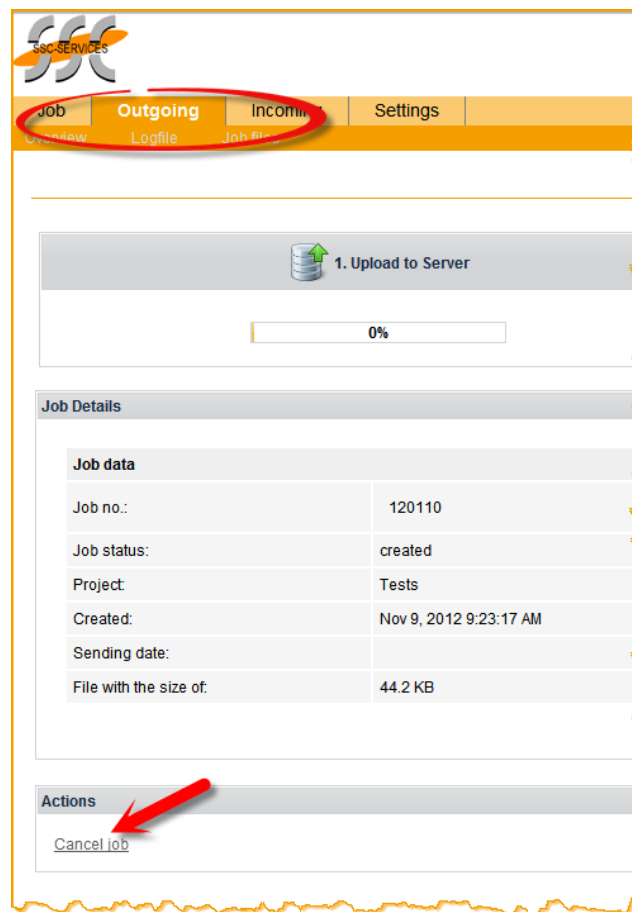


Figure 8.15 Cancel job



#### 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.

## 8.2 Actions Group

### 8.2.1 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.

### 8.2.2 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**.

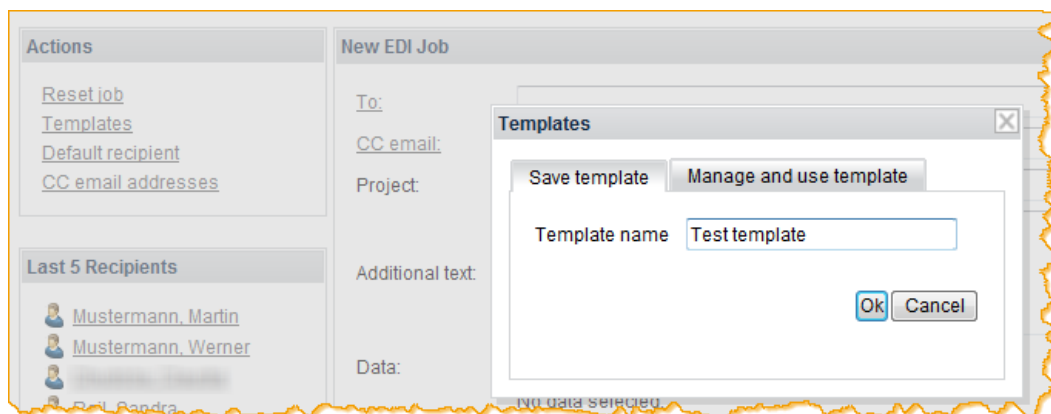


Figure 8.16 Create template

#### 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.

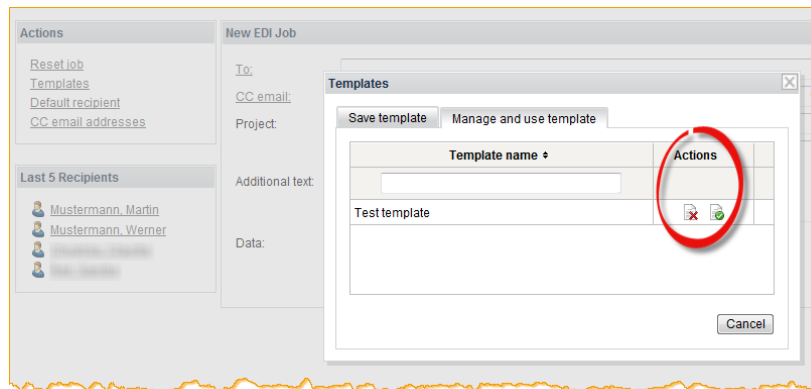


Figure 8.17 Manage and use template

### 8.2.3 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.

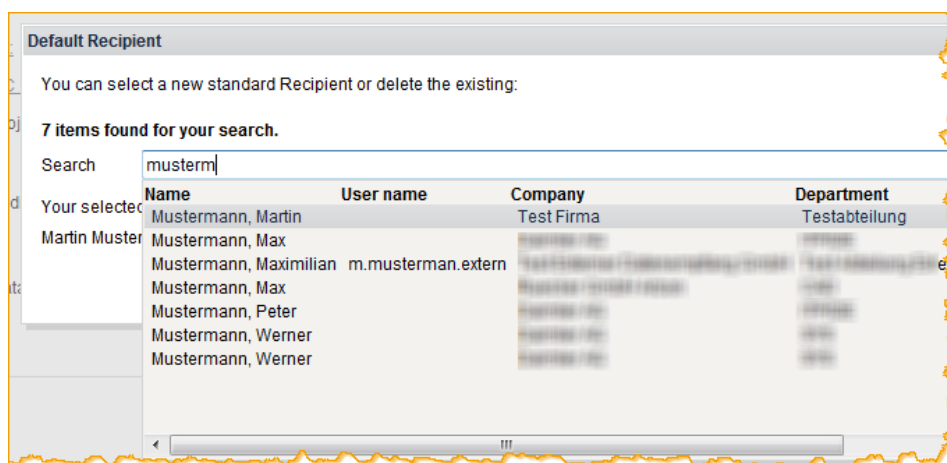


Figure 8.18 Edit default recipient

### 8.2.4 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.

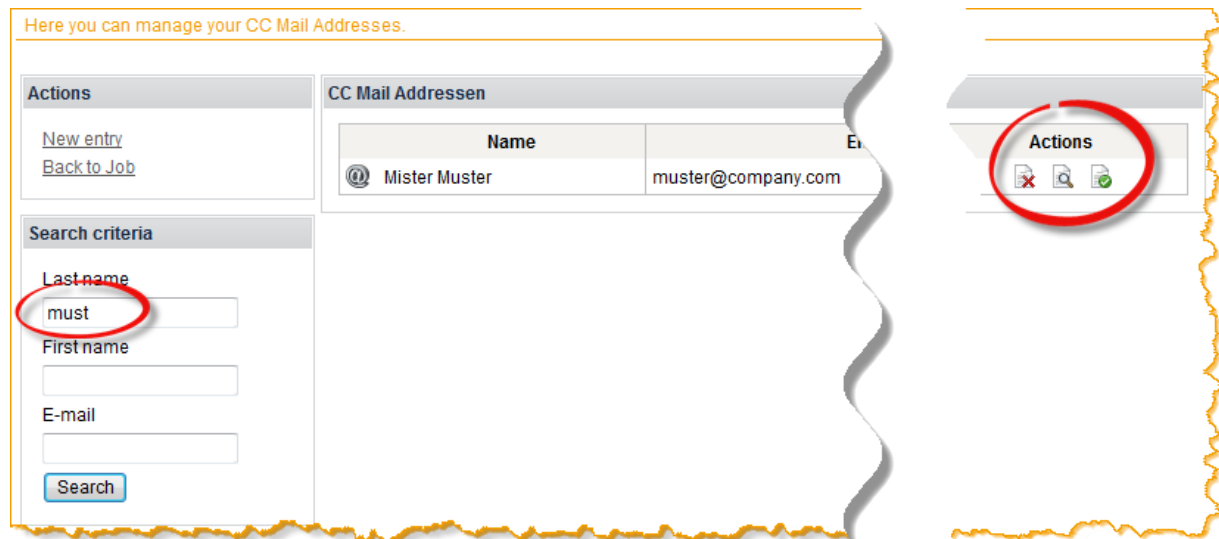


Figure 8.19 CC email addresses – selection box

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.

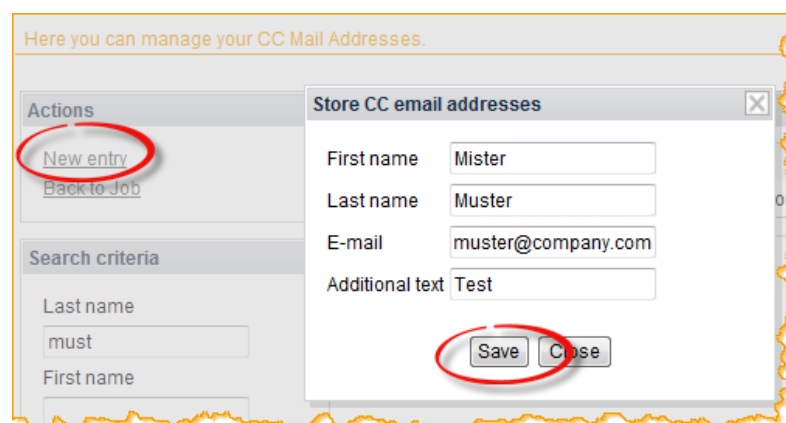




Figure 8.20 CC email addresses – new entry



## 9 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).

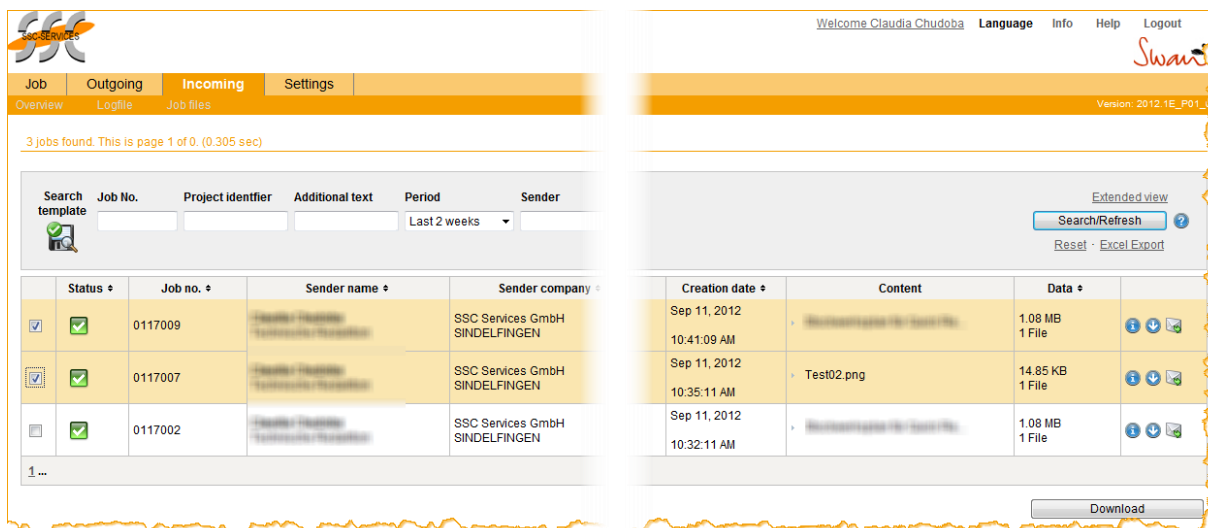
- Activate the **Outgoing** tab.

⇒ 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.



The screenshot displays the 'Incoming' tab of the SSC interface. At the top, there's a navigation bar with 'Job', 'Outgoing', 'Incoming' (selected), and 'Settings'. Below it, a sub-bar shows 'Overview', 'Logfile', and 'Job files'. A message states '3 jobs found. This is page 1 of 0. (0.305 sec)'. A search template is visible with fields for 'Job No.', 'Project identifier', 'Additional text', 'Period' (set to 'Last 2 weeks'), and 'Sender'. The main table lists three jobs:

Status	Job no.	Sender name	Sender company
<input checked="" type="checkbox"/>	0117009	Thomson - Thomson	SSC Services GmbH SINDELFINGEN
<input checked="" type="checkbox"/>	0117007	Thomson - Thomson	SSC Services GmbH SINDELFINGEN
<input type="checkbox"/>	0117002	Thomson - Thomson	SSC Services GmbH SINDELFINGEN

Below the table, a detailed view of a selected job is shown, including 'Creation date', 'Content', and 'Data'. It lists three items: two files (1.08 MB each) and one file (14.85 KB). A 'Download' button is at the bottom right.

Figure 9.1 Example - Incoming list

### 9.1 Query information about jobs

#### 9.1.1 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 (yellow) and the checkmark is set.

Information is only displayed for the pink highlighted job.

 1. Upload to Server  


 2. Job Processing  


 3. Data transfer  


**Job Details**

Job data		Sender		Recipient	
Job no.:	120041 (Generated incoming job: 120042)	Company:	SSC Services GmbH	Company:	SSC Services GmbH
Job status:	finished	Site:	SINDELFINGEN	Site:	SINDELFINGEN
Project:	Test	Department:	Technische Realisation	Department:	Technische Realisation
Created:	Nov 8, 2012 1:04:52 PM	Name:	Heidi, Heidi	Name:	Heidi, Heidi
Sending date:	Nov 8, 2012 1:08:04 PM	E-mail:	h.heidi@ss-services.de	E-mail:	h.heidi@ss-services.de
File with the size of:	40.48 KB	Phone:	-	Phone:	-

Figure 9.2

View - Overview

Here you see the events for the job 120041

Date	Message
Nov 8, 2012 1:04:53 PM	Created Job with ID:120041
Nov 8, 2012 1:05:53 PM	start Upload of job [120041] by user P:\SWAN Testdateien - Test01.docx on machine
Nov 8, 2012 1:05:54 PM	end Upload of job [120041] Transferrate: 397.0 kb/s
Nov 8, 2012 1:06:00 PM	Start job processing
Nov 8, 2012 1:06:00 PM	Executing process step: Prepare job
Nov 8, 2012 1:06:10 PM	Executing process step: GZip
Nov 8, 2012 1:06:10 PM	Wait for asynchronous Processstep [GZip]
Nov 8, 2012 1:06:11 PM	Finish processing with status [WAITING]
Nov 8, 2012 1:07:00 PM	Start job processing
Nov 8, 2012 1:07:02 PM	Executing process step: Engdat v2
Nov 8, 2012 1:07:06 PM	Executing process step: ExCatIDQ
Nov 8, 2012 1:07:10 PM	Executing process step: LocalSend
Nov 8, 2012 1:07:11 PM	Finish main processing of job [120041] with status FINISHED
Nov 8, 2012 1:07:11 PM	Dispatch job for post processing
Nov 8, 2012 1:07:11 PM	Finish processing with status [WAIT_FOR_POST_PROCESSING]
Nov 8, 2012 1:08:00 PM	Start post processing
Nov 8, 2012 1:08:00 PM	Executing process step: Mail
Nov 8, 2012 1:08:04 PM	Finish post processing of job [120041] with status [FINISHED]
Nov 8, 2012 1:08:04 PM	Finish processing with status [FINISHED]

Figure 9.3 View - Logfile


Here you see all files of the job 120041

File name	Content	Creation date	File Size	Format
Test01.docx.gz ENG12110813045200201002002	6a3a0874-8631-468a-a4b4-f536a75e1d04 [PKZIP]	Nov 8, 2012 1:06:47 PM	40.48 KB	GZIP

Generated delivery note: [deliverNote\\_120041\\_en.pdf](#)

Figure 9.4 View - Job files

### 9.1.2 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.

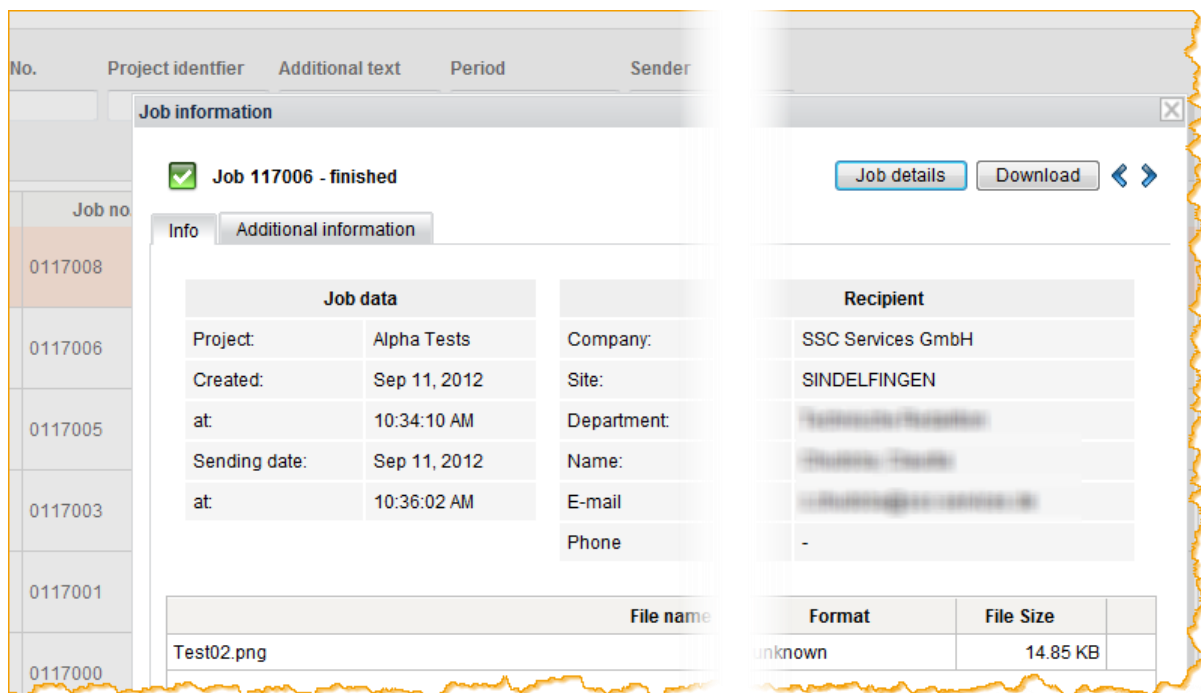


Figure 9.5 Example - Job information

## 9.2 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.

### 9.2.1 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 9.1 Job status – icons outgoing list

### 9.2.2 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 9.2 Job status – icons incoming list

## 9.3 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

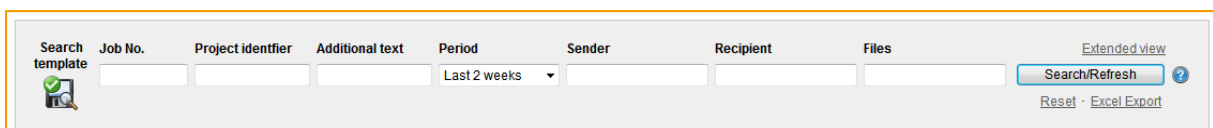
A search template which is already active is tagged with the icon  instead of . The name of the active search template can be seen through mouse-over.

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

### 9.3.1 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.



Search template	Job No.	Project identifier	Additional text	Period	Sender	Recipient	Files	Extended view
	<input type="text"/>	<input type="text"/>	<input type="text"/>	Last 2 weeks	<input type="text"/>	<input type="text"/>	<input type="text"/>	<a href="#">Search/Refresh</a> <a href="#">Reset</a> <a href="#">Excel Export</a>

Figure 9.6

Search mask - Simple view



#### Info – search mask input

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

### 9.3.2 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.

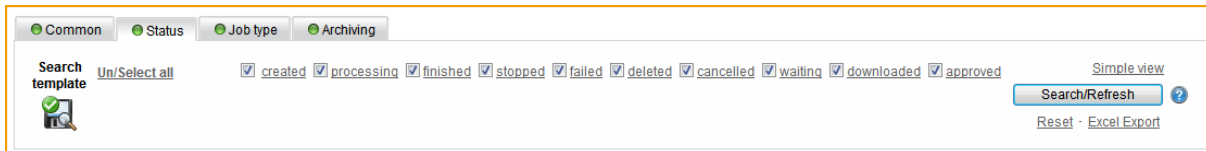



Figure 9.7 Search mask - Extended view

### 9.3.3 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**.

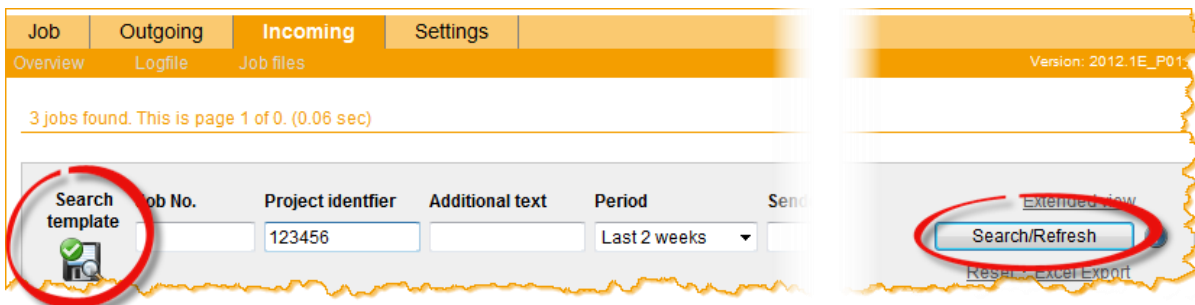


Figure 9.8 Save search template (1)

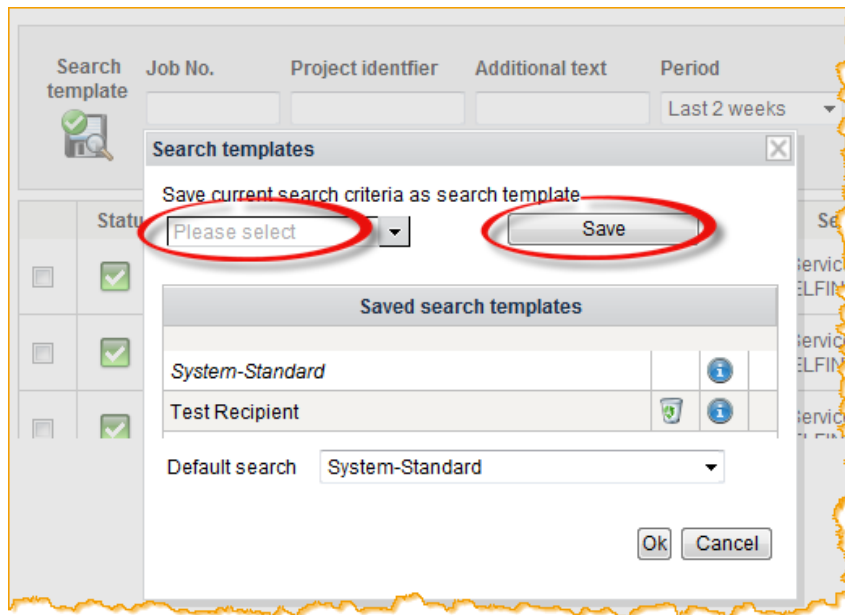


Figure 9.9 save search template (2)

**Info**

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

### 9.3.4 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.

### 9.3.5 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 🔍.



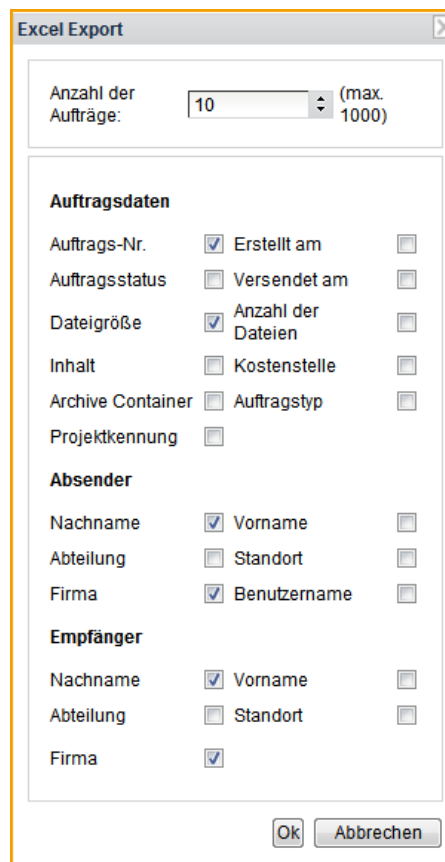
## 9.4 Export job lists

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 9.10 Export job lists - Excel Export



**Excel Export**

Anzahl der Aufträge: 10 (max. 1000)

**Auftragsdaten**

Auftrags-Nr. ☒ Erstellt am ☐  
 Auftragsstatus ☐ Versendet am ☐  
 Dateigröße ☒ Anzahl der Dateien ☐  
 Inhalt ☐ Kostenstelle ☐  
 Archive Container ☐ Auftragsstyp ☐  
 Projektkennung ☐

**Absender**

Nachname ☒ Vorname ☐  
 Abteilung ☐ Standort ☐  
 Firma ☒ Benutzername ☐

**Empfänger**

Nachname ☒ Vorname ☐  
 Abteilung ☐ Standort ☐  
 Firma ☒

Ok Abbrechen

Figure 9.11 Export job lists – select the information

## 9.5 Download files

### 9.5.1 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.

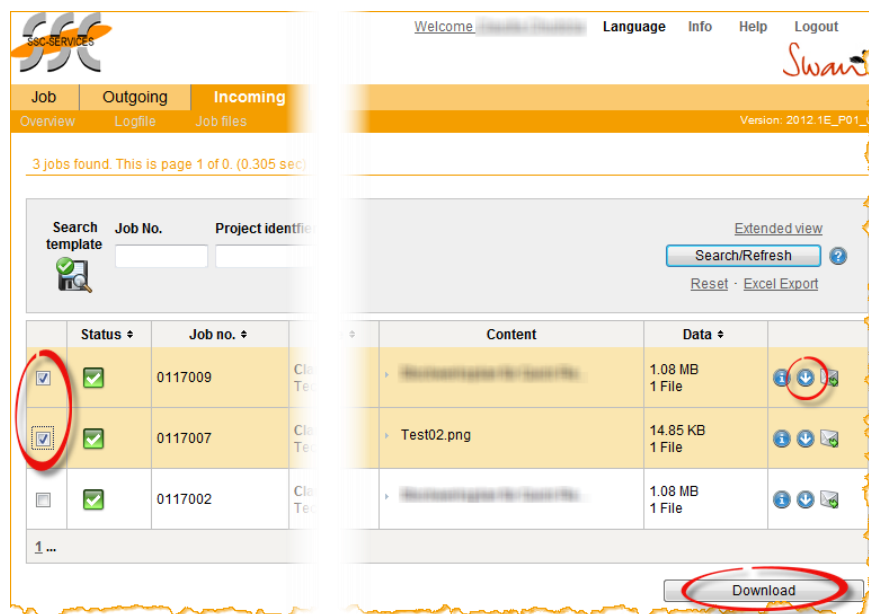



Figure 9.12 Download files - Incoming list



Figure 9.13 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.

### 9.5.2 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.
-

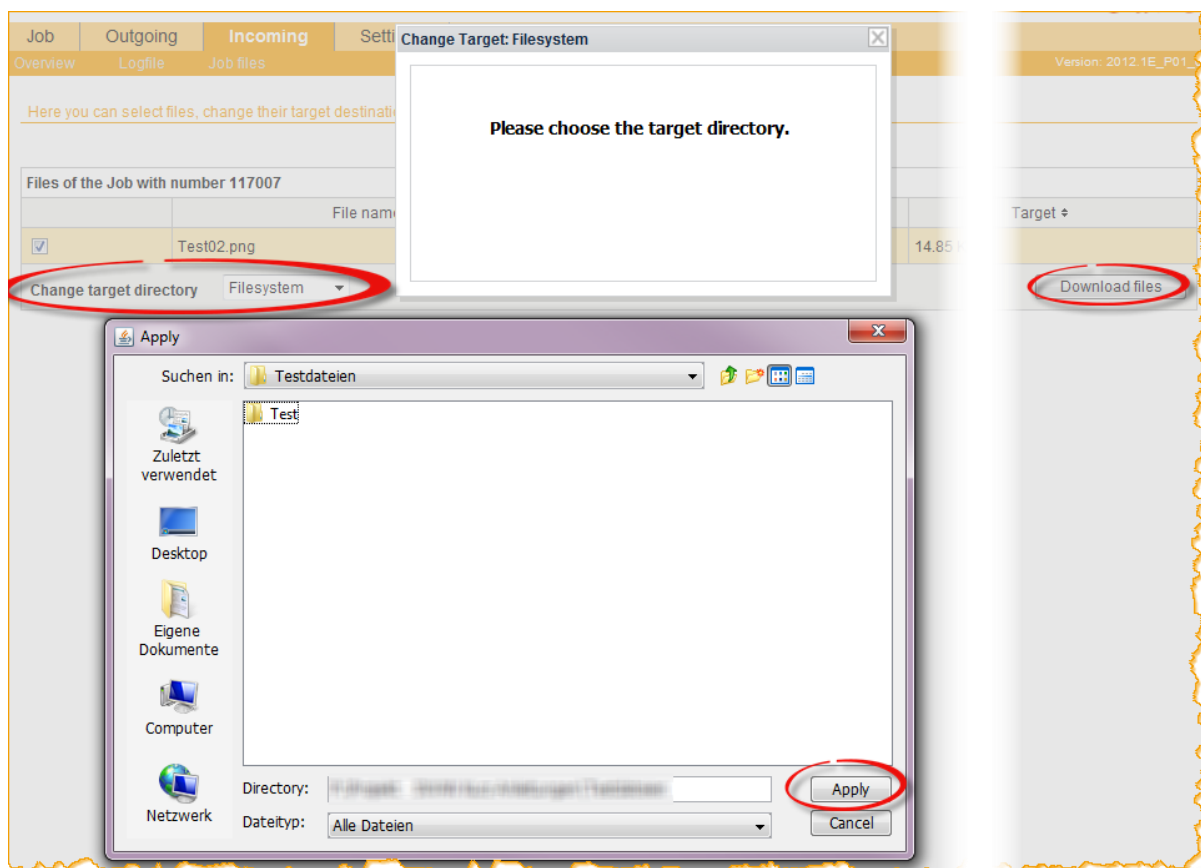


Figure 9.14 Download files - select target directory

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.

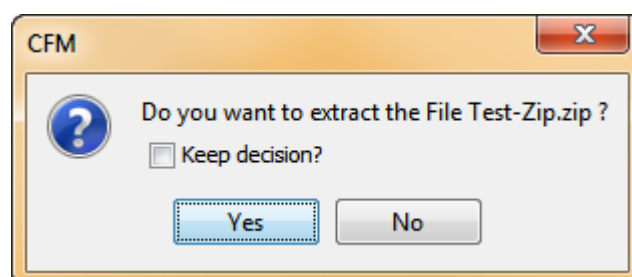


Figure 9.15 Dialogue on ZIP or TAR file

## 10 Logout

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

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

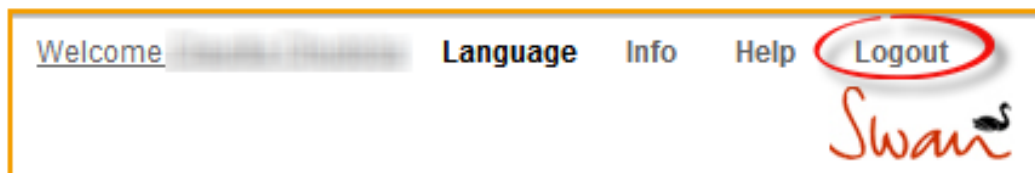


Figure 10.1 Logout



## 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.

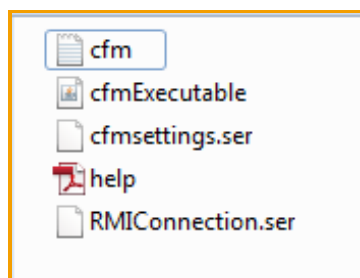


Figure A 1

CFM - files

### 2 CFM main view

#### 2.1 File

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

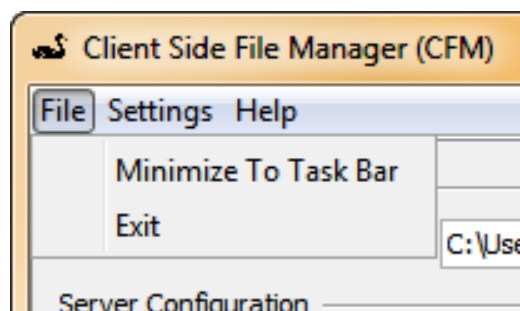


Figure A 2

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.

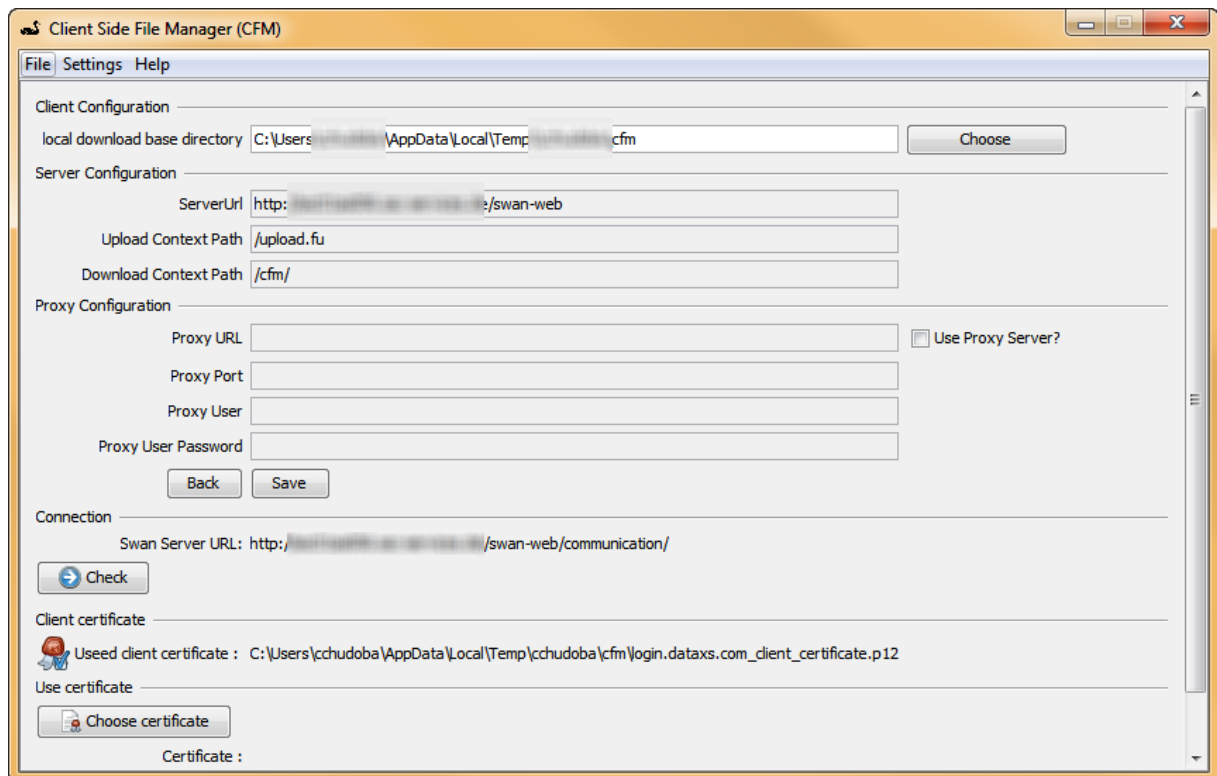


Figure A 3 CFM – Settings tab



### 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.

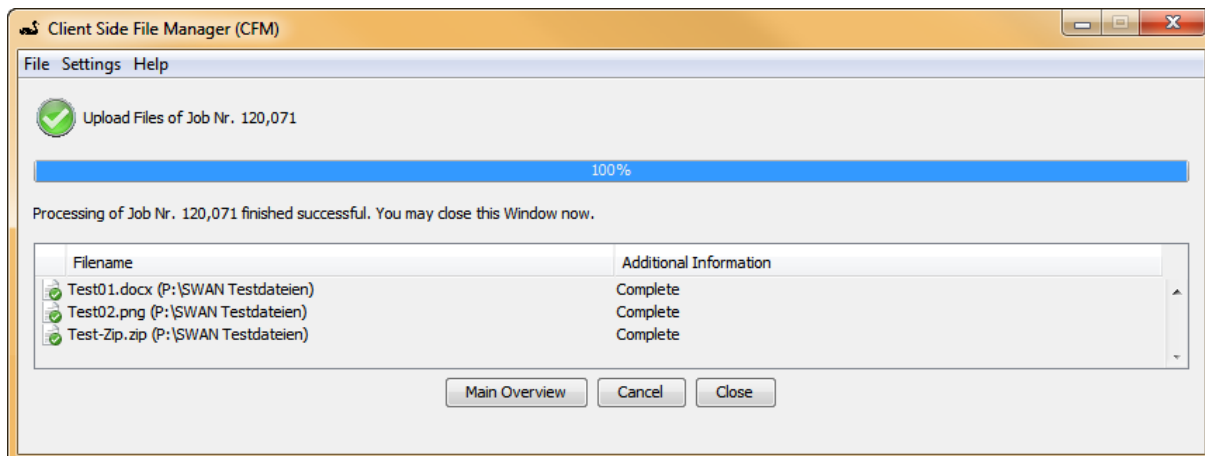


Figure A 4 CFM - Example: upload information on job

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

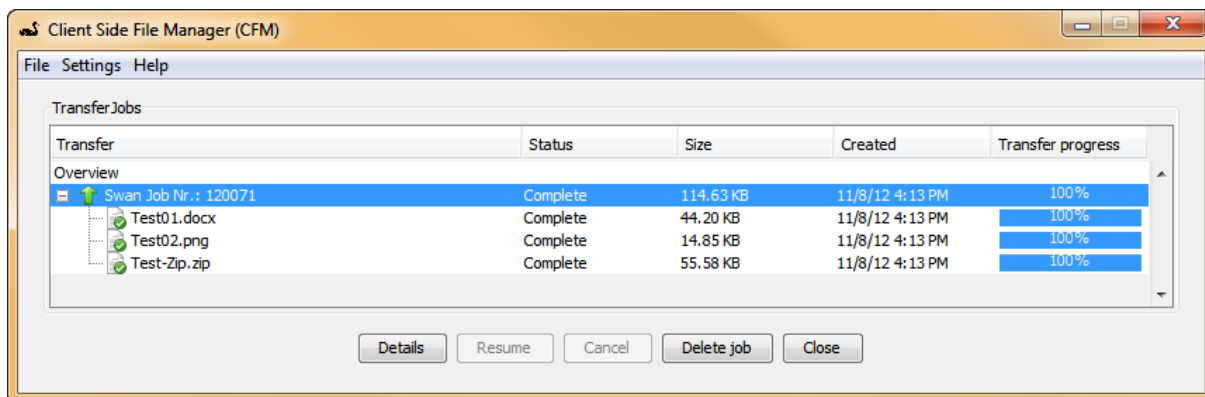


Figure A 5 CFM – main overview of transfer jobs



#### 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.

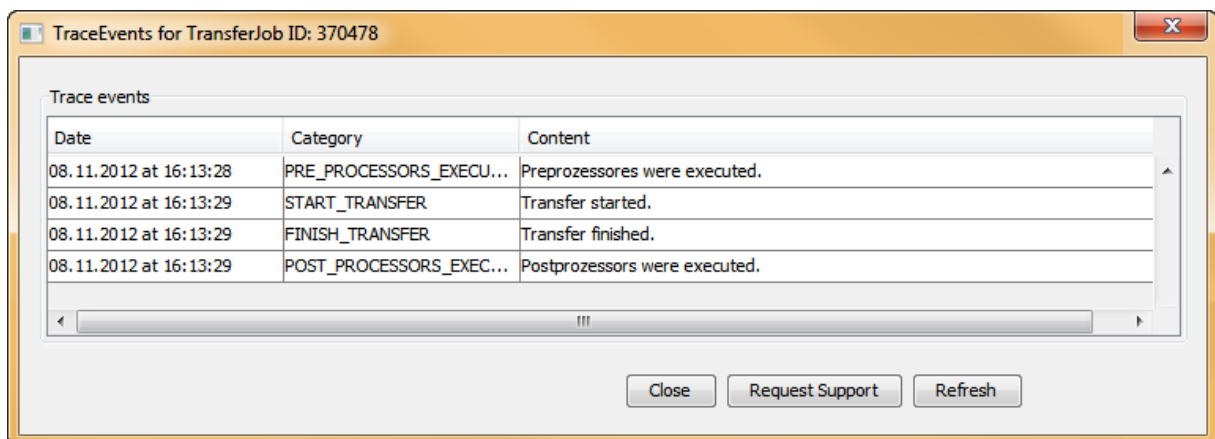


Figure A 7 CFM – transfer information

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.

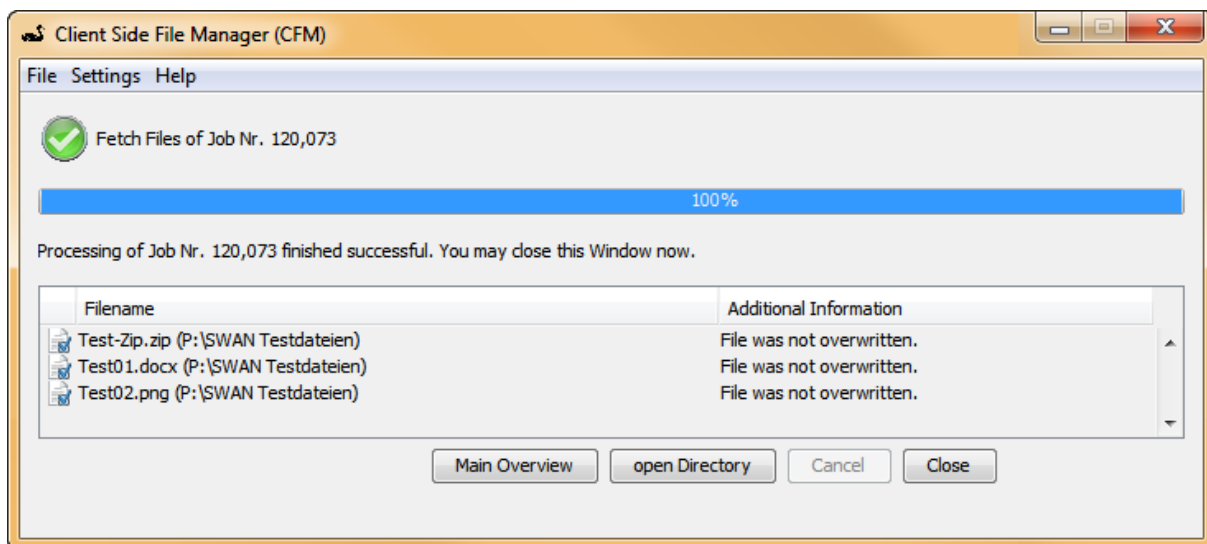


Figure A 8 CFM – download information on Job

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

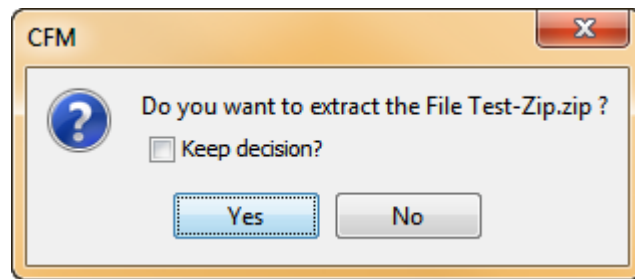


Figure A.9 CFM – unpack archives

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.