Datenpool Manual

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Basics of the Datenpool

The data pool is a central platform for the storage and distribution of projectrelated documents, plans and BIM models and makes use of modern technologies for communication and information management on the web. Access to the platform is via web browser and is protected by username and password.
The data pool is optimized for working with Mozilla Firefox and Chrome and can also be used without installing apps with the Edge and Safari browsers as well as with tablets or smartphones.

The authorization system of the data pool can be used to determine individually which persons have access to a document. The system manages all files such as plans, correspondence, protocols or BIM models in the individually configurable filing folders.
Project participants can be informed about new documents or plans by e-mail via a distribution function. Individually configurable workflows support the process flows in the project, and automated versioning ensures that only the latest version of documents or plans is available in the view.

Tags: Berechtigungssystem Informationsmanagement BIM

Maintenance window

All functions of the data pool, including security technology and user management, are made available centrally.

In order to maintain the high security and quality of the system, regular updates of the operating systems and security devices are required. For these regular updates of the systems, a daily maintenance window from 10:00 p.m. to 12:00 a.m. has been defined, during which maintenance and updates can be carried out on the system without prior notice. More extensive maintenance work and updates are announced in advance via the system status in the footer, indicating the approximate duration of the work. If maintenance work is carried out on the system, access to the server is not possible.

Helpdesk

From Monday to Friday from 8:00 a.m. to 5:00 p.m., a helpdesk is available to you that you can contact if you have any questions or problems while working with the data pool. You can reach the helpdesk

- by phone at:

  Austria/Germany: 0043 (0)50 756 300

  Czechia: 00420 568 800 301

  Slovakia: 00421 267281 302

  Ukraine/Russia: 0038 0444981267 303

- for Mail unter: helpdesk@datenpool.at

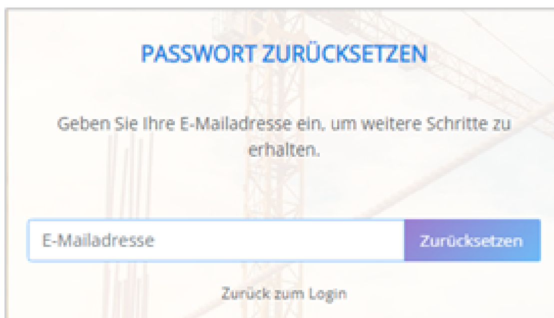
- online using the contact form: via the "**Help**" menu in the header of the data pool

Request password

If you have forgotten your password or if your password has expired, you can request a new password online. Open the data pool via the link **dashboard.datenpool.at** and click on the link **„Forgot your password?“** in the login mask.

A dialog box will ask you to enter your forwarding email address, which is stored in the system. The system will send you a link to reset the password to this e-mail address.

Optionally, you can also enter your project email address that has been assigned to you in the data pool. If you work in several projects in the data pool with different accounts, but use the same forwarding mail, you must use the project mail address to reset the password.



After entering the e-mail address, start the process by clicking on the "**Reset**" button, the system will send a message to the specified e-mail address with a link to reset the password. By clicking on this link, you will be redirected to the dialog box for entering the new password.

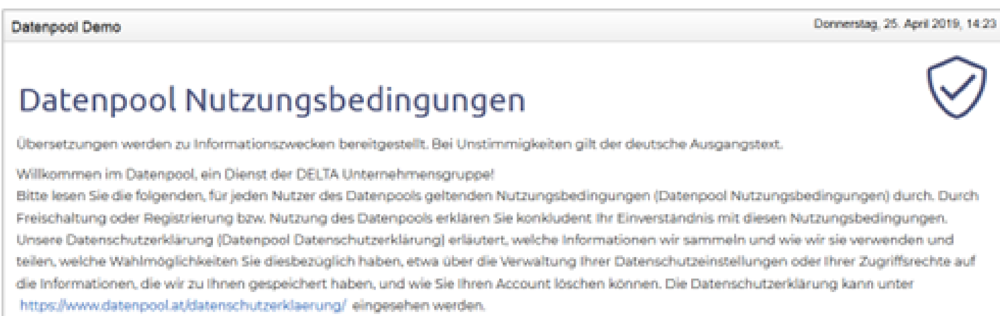
The administration process for storing the new password can take a few minutes, during which the password will be changed for all projects to which you have access with your account.

Privacy and GDPR Terms of Use

Access to documents and plans in the data pool is controlled by an authorization system that allows individual assignment of read and edit rights per document. The authorization is assigned by the creator when creating a new document and can only be changed by other users if the creator expressly assigns the necessary rights.

Data uploaded and stored in the data pool by the creator is the property of the creator and cannot be shared with third parties without the creator's consent. Therefore, there are no users in the data pool who can automatically read all documents that are uploaded to the system. If default readers have been defined for individual documents or plans, it is possible to determine which people will have read access to the document after saving the document before it is saved.

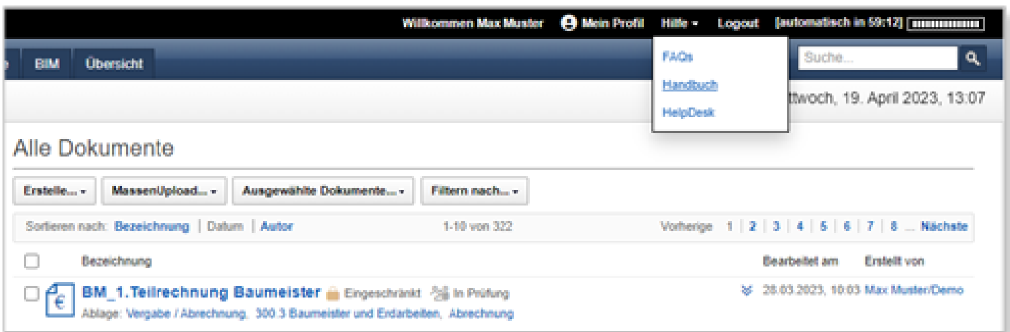
In order to meet the high requirements of the General Data Protection Regulation (GDPR) with regard to personal data, it is necessary to agree to the terms and conditions of use of the data pool before opening the data pool for the first time.



Open Manual

The data pool manual can be opened online at any time to read functions or create a printout.

To open the manual, click on the "**Help - Manual**" menu in the header of the user interface. The manual opens in pdf format.



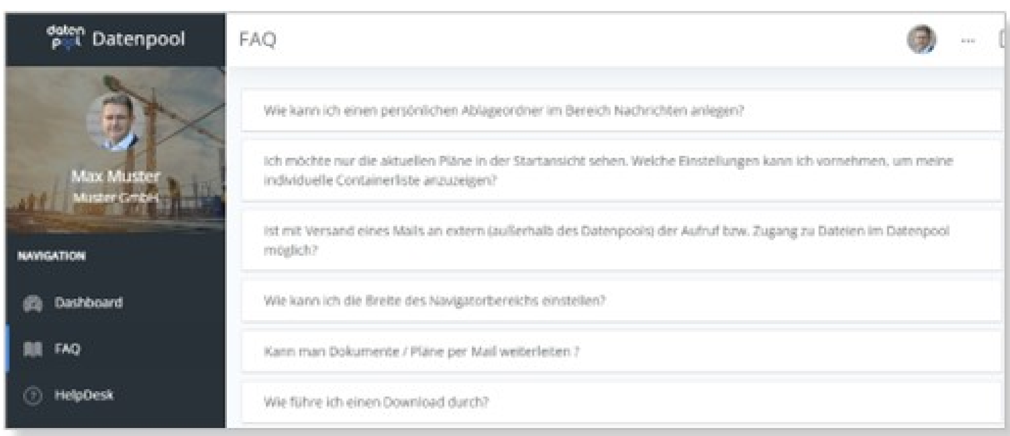
Please note that different versions of the data pool may be used in different projects. In the "**Help – Manual**" menu, the manual that matches the current version of the data pool is always provided.

FAQ – Frequently Asked Questions

For quick help with questions about the data pool, the system provides FAQs that can be opened directly from the data pool.

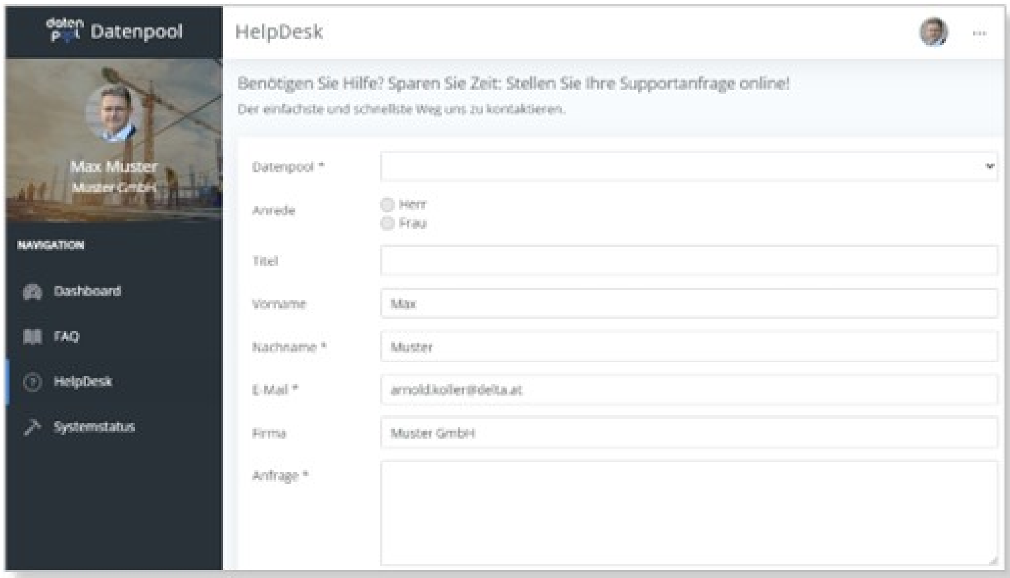
There are two ways to open the FAQs:

1. In the project, click on the "**Help - FAQs**" menu in the header of the user interface. The FAQ will open in a new tab of the browser.
2. In the dashboard of the data pool, click on the menu item "**FAQ**" in the navigator. The FAQs are displayed in the active window of the dashboard.



Helpdesk Contact Form

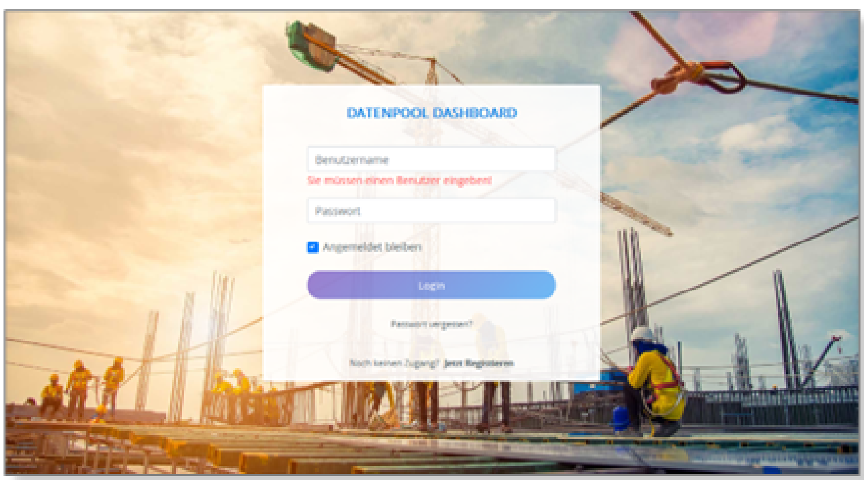
For written inquiries to the helpdesk, the system provides a contact form that can be opened directly via the "**Help**" menu in the header of the data pool or in the navigator of the dashboard.



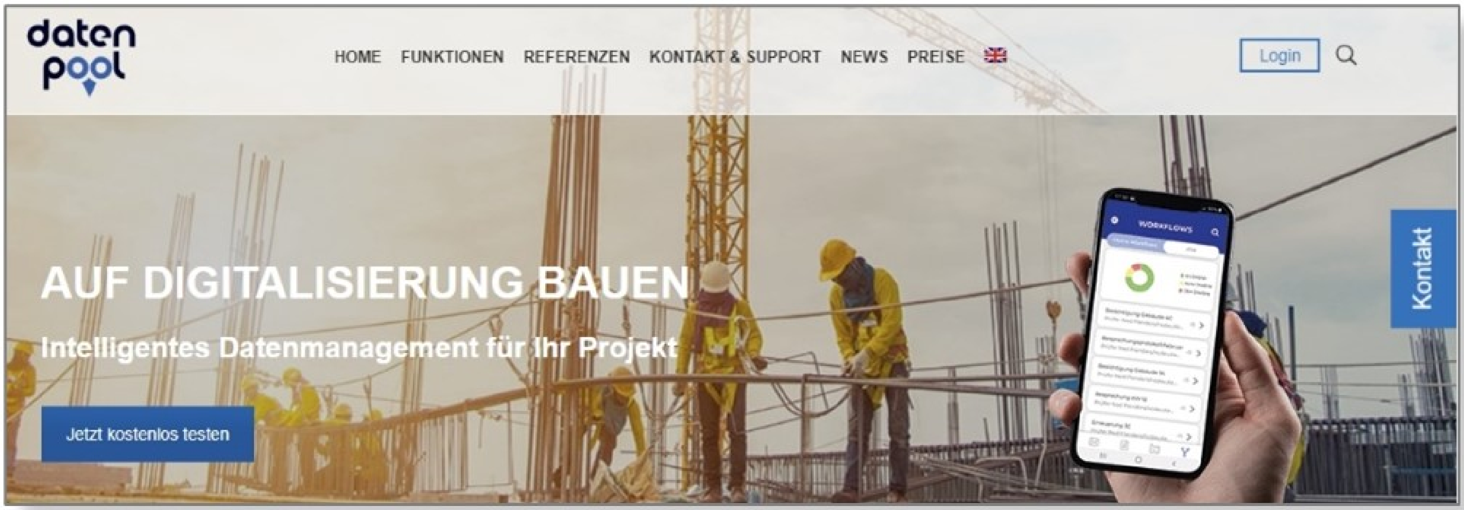
Open Datenpool

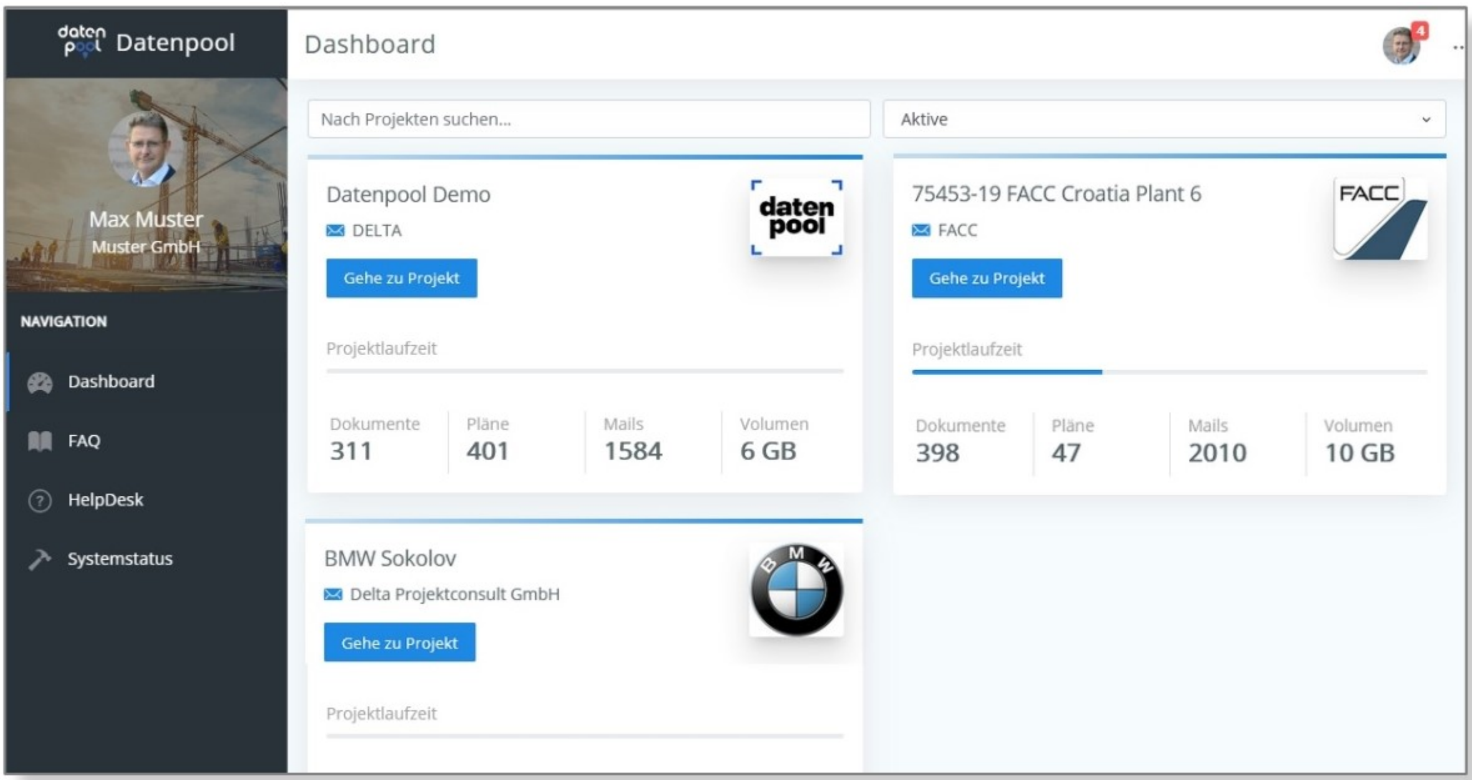
You can access multiple projects in the data pool with one account. The system provides you with a dashboard that gives you an overview of your projects. After logging in, you can work on several projects in parallel without logging in again. You will automatically remain logged in to the dashboard for 7 days, so you only need to enter your password once a week.

> **OPEN DATA POOL DASHBOARD**
>
> To open the Data Pool Dashboard, perform the following steps:
>
> 1. Launch the web browser
> 2. Enter the address "dashboard.datenpool.at"
> 3. In the login window, enter your **Username** and the **Password** and confirm the entry. After checking the login data, the Dashboard opened.



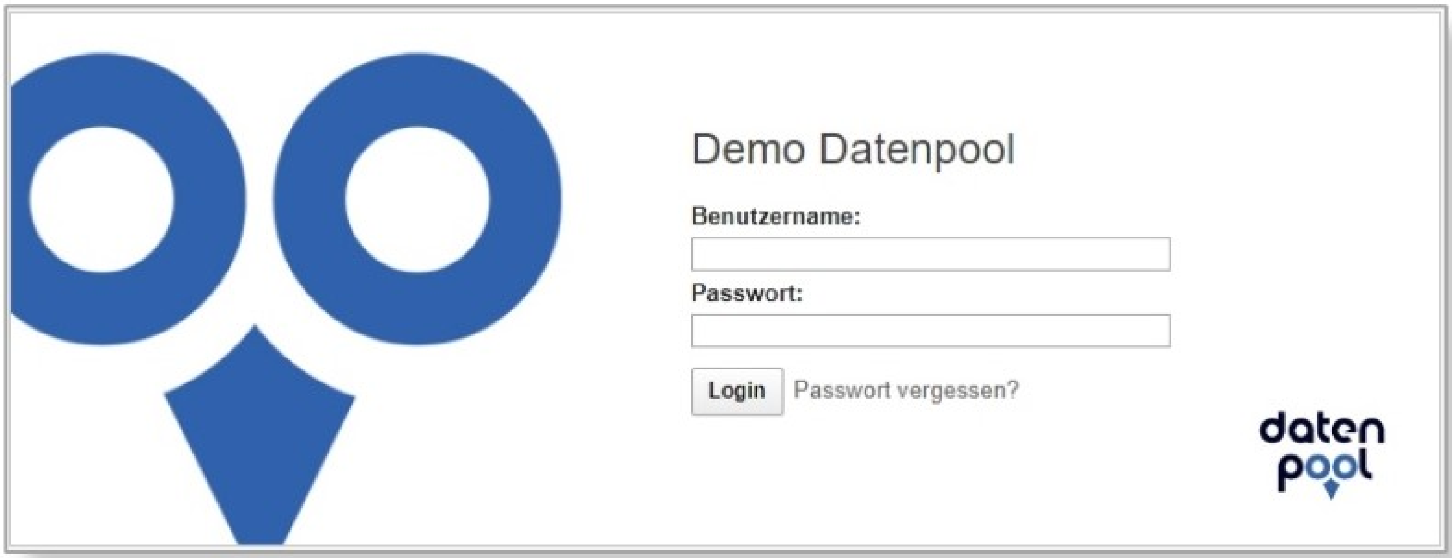
Alternatively, you can open the dashboard from the data pool website. In the browser, launch the website www.datenpool.at and click on the "**Login**" button to go to the login for the dashboard.





The dashboard shows all the projects you currently have access to. After selecting the desired project, the data area opens in a new window. You can work in several projects at the same time, each selected project is opened in its own browser window, and you can switch between the windows as you wish.

If you want to access a single project directly, you can create a bookmark (bookmark or favorite) in the browser after opening the project. This bookmark can be used to open the project next time. Before the data section opens, you need to log in with your username and password.

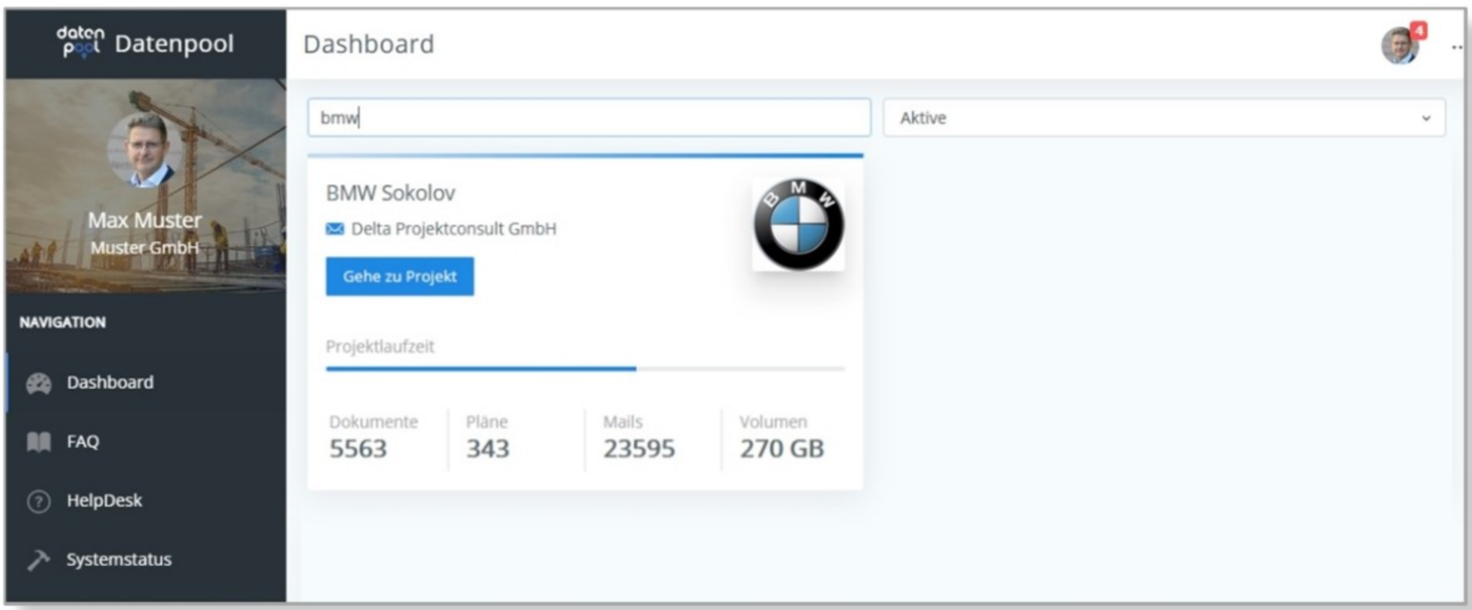


After logging in to the dashboard, you will remain logged in for 7 days if you do not log out manually. The session in the projects themselves is terminated by the server after 60 minutes if there is no more activity.

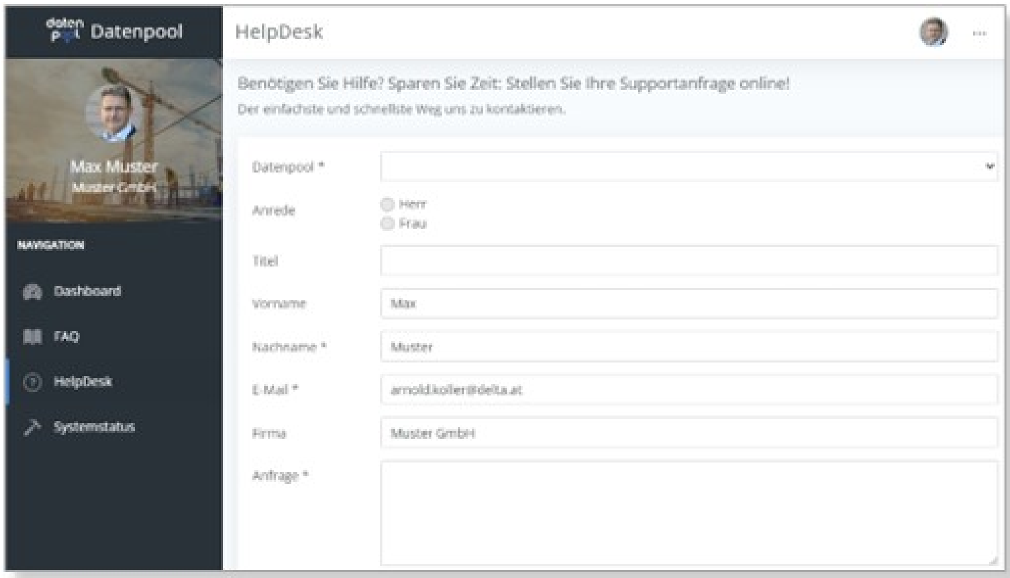
> **TIPP**
>
> In the dashboard, you will automatically remain logged in for 7 days if you do not log out manually. This means that the password is only required once a week. To open the dashboard faster, a bookmark (bookmark or favorite) can be set up in the browser. After opening the login to the dashboard (dashboard.delta.at), click on the "**Set up bookmarks**" button of your browser. In the future, the login to the dashboard can be opened via the bookmark by clicking on the bookmark – if you are still logged in, the dashboard will open immediately.

Searching for Projects in the Dashboard

If you have access to a large number of projects in the dashboard, you can use the search function to quickly find the project you want.
In the "**Search for projects...**" enter the desired search term, the corresponding projects are displayed immediately. In the search function, it is not relevant where the search term appears in the project name, all possible results are listed.



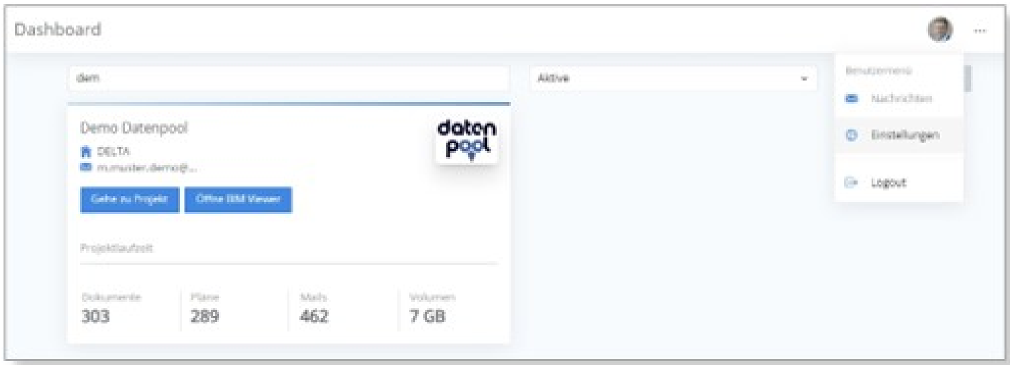
In addition to accessing the projects, a message to the helpdesk can also be created in the dashboard via the navigator. To send the message, click on the button at the bottom of the page after filling out the form.



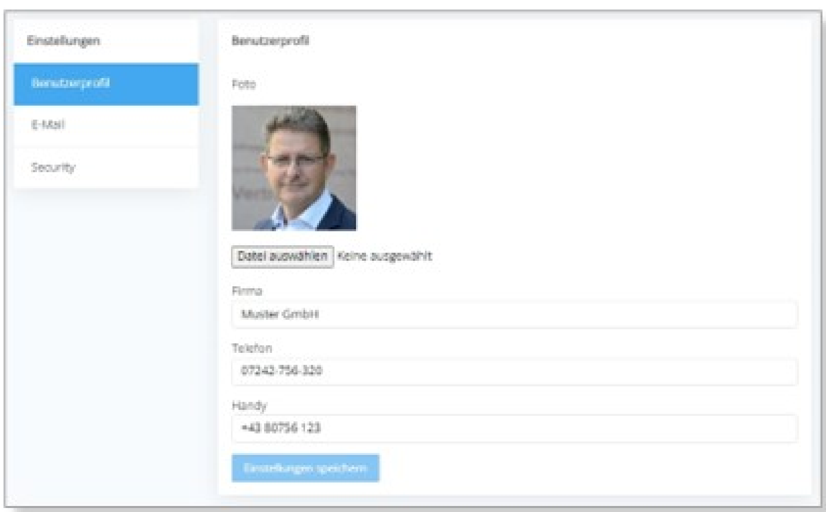
The dashboard also provides you with FAQ ́s to read and the current system status, which provides information about planned maintenance work on the data pool system.

User-related settings

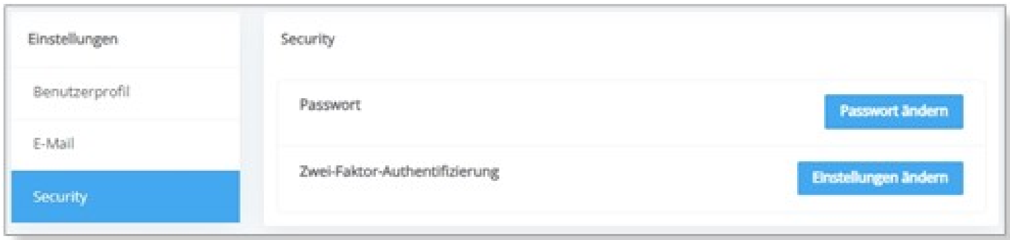
In the dashboard of the data pool, basic settings can be made for the user profile and the security standards. To open personal settings, click on the avatar with your abbreviation in the top right corner of the header.



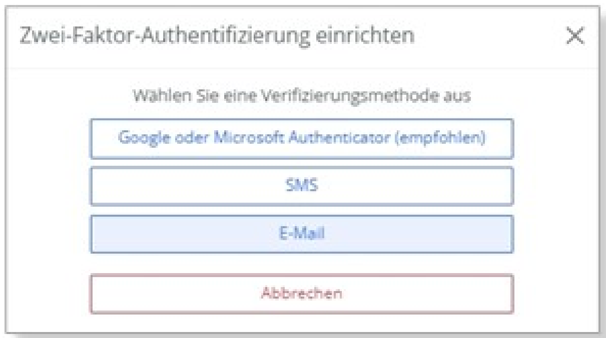
In addition to the contact details and photo for the user profile, the security settings can also be changed. The currently stored forwarding e-mail address can only be queried in the settings, a change of the e-mail forwarding is only possible through the helpdesk.



In the "**Security**" section, the current password can be changed and the settings for two-factor authentication can be made. When activating two-factor authentication, a 6-digit numerical code is also sent when logging in with username and password, which must be entered within 6 minutes. Without this changing numerical code, access to the data pool is not possible, which significantly increases the security of the system.

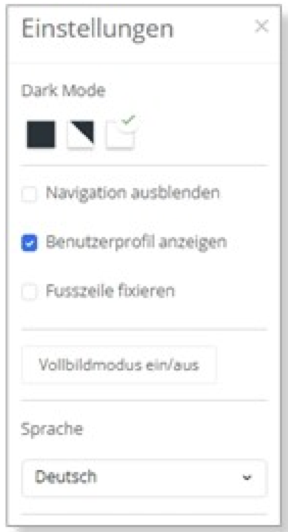


When activating twofactor authentication, you can specify whether the numerical code should be delivered via a Google or Microsoft Authenticator app, by SMS or by e-mail. The use of an e-mail address is only recommended for a company account with a project mail-box to which several people have access. The two-factor authentication settings can be changed again at a later time.



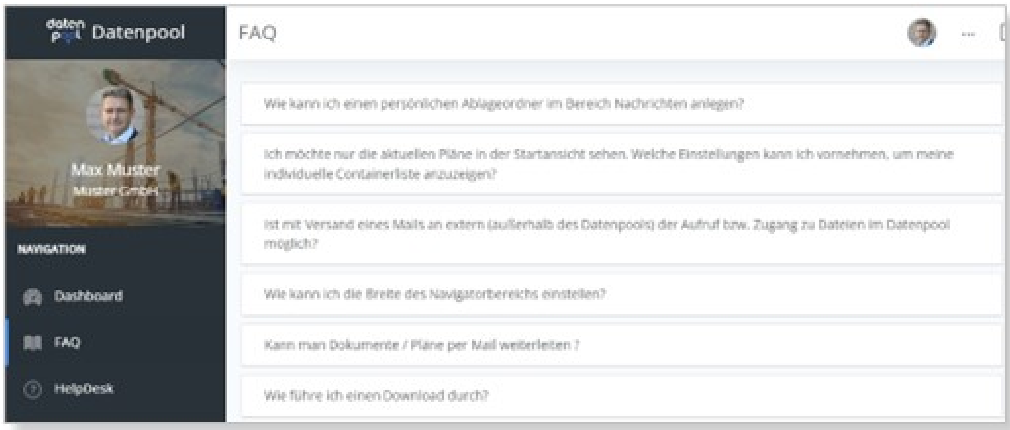
Setting the language

The user interface settings button in the header of the dashboard (button with 3 dots) can be used to set the desired language in addition to the visual display of the user interface.
The language setting is only valid for the dashboard, the selection of the language in the indi-vidual project databases must be made individually, whereby different languages may be available in different projects.



FAQ – Frequently Asked Questions

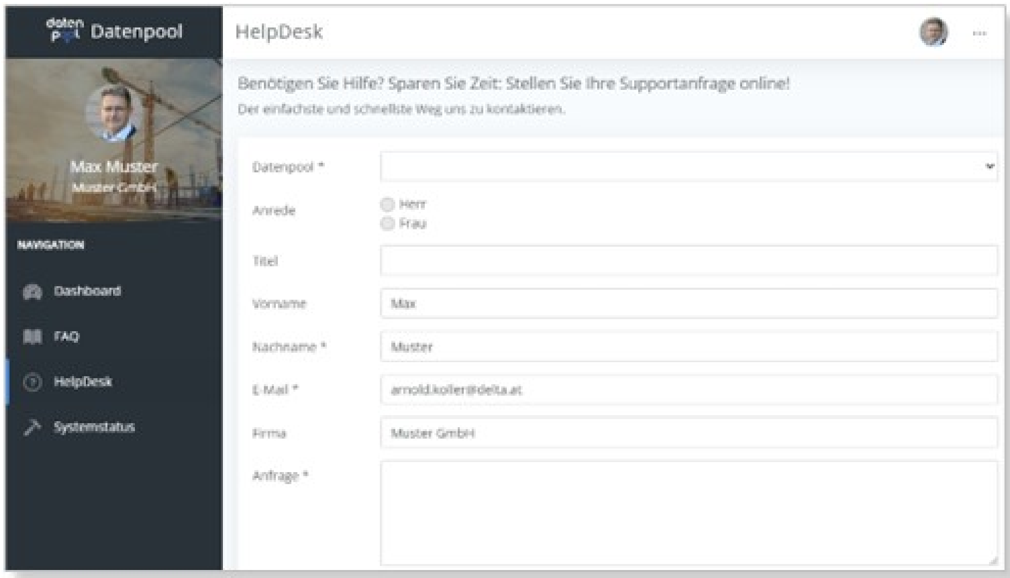
For quick help with questions about the data pool, the system provides FAQs that can be opened directly from the dashboard.



Alternatively, the FAQs can also be opened directly in the project via the "**Help – FAQs**" menu in the header of the user interface.

Helpdesk Contact Form

For written inquiries to the helpdesk, the system provides a contact form that can be opened directly via the navigator in the dashboard.



Systemstatus

The system status can be used to query planned maintenance work or current faults. Planned maintenance work is also announced by a red banner at the start of the data pool.

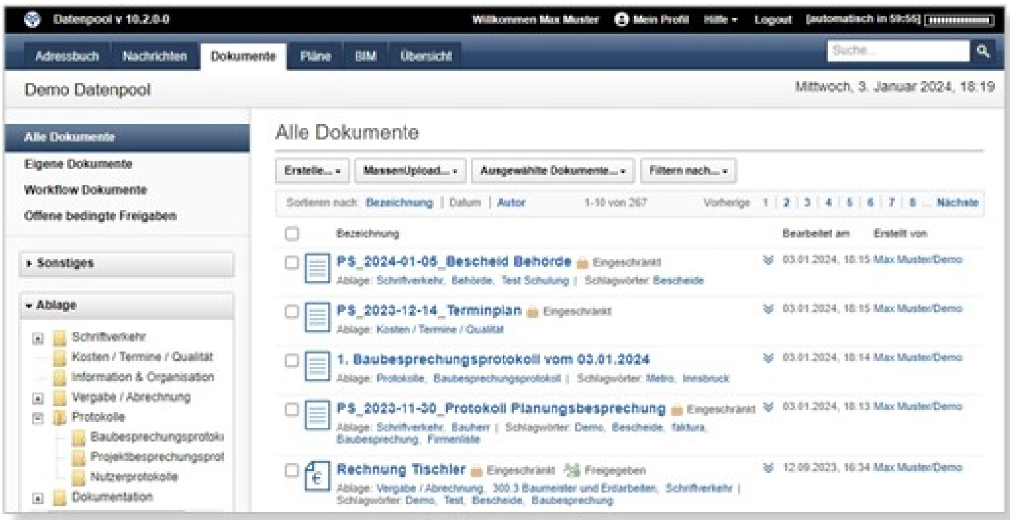
The structure of the Datenpool

The data pool has a modular structure and can be individually configured to meet the requirements of the project. Therefore, different tabs, filing folders and functions are displayed depending on the project.
The authorization system controls access to documents, filing folders and the creation of new documents, so the elements of the data pool can differ for different users in a project.

The structure of the data pool, such as modules, filing folders, creation rights and workflows, is usually determined by the client in coordination with project management and consultants. Changes or additions to the system are coordinated by the responsible project manager in the project team and passed on to the administration of the data pool for incorporation. It is not possible for users or workflows to be created by users.

The module

The available modules in the data pool are displayed as tabs in the header. By clicking on the respective tab, the desired module can be opened.
Depending on the configuration set, different modules may be available in different projects. In addition, it is also possible that additional modules will only be activated in the course of the project and expand the range of functions.

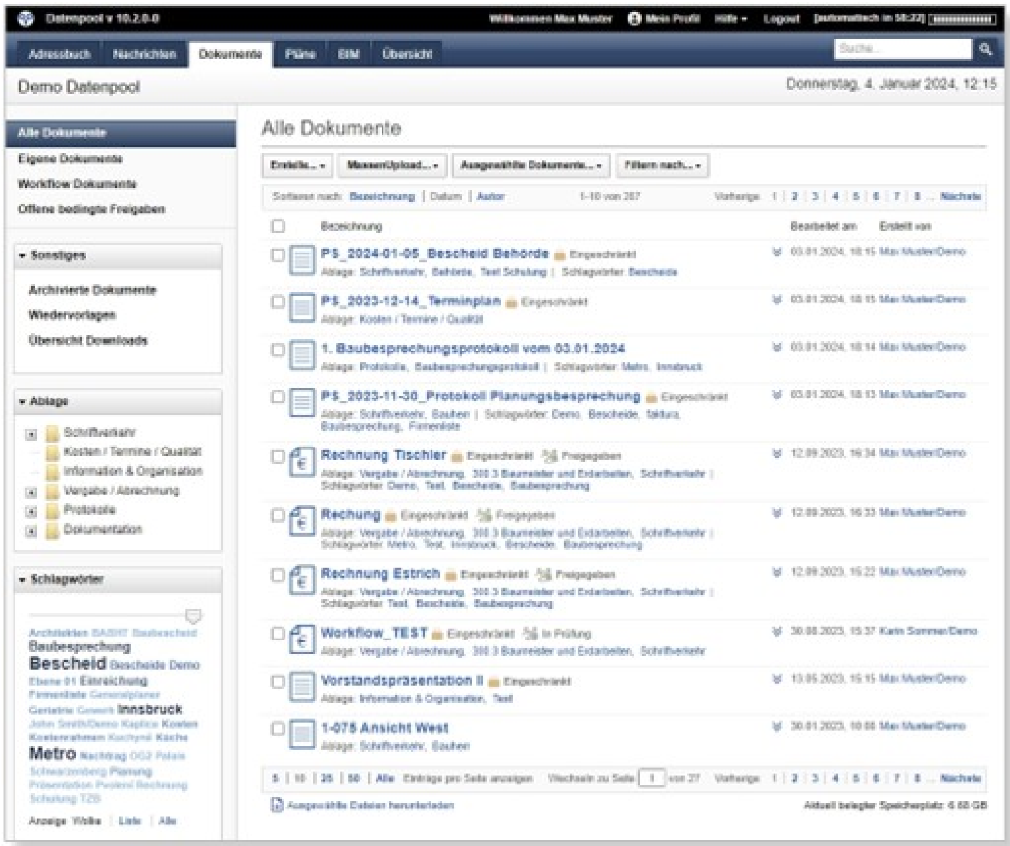


Folgende Module stehen im Datenpool zur Verfügung:

- Adressbuch
- Nachrichten
- Dokumente
- Pläne
- BIM
- Übersicht
- Archiv

Views, Folders, and Tags

In the left column of the browser window are the navigation elements for displaying the different views as well as the filing folders and keywords.



When you select one of the **views** in the Navigator, the corresponding documents are displayed in the data area on the right.

- **All documents**:
  - The view shows all documents to which the user has read permission
- **Own documents**:
- the view lists all documents created by the user
- **Workflow Dokumente**:
  - the view gives an overview of all documents with workflow that are currently under review and to which the user has read permission.
- **Open Conditional Shares**:
  - The view shows all documents that have been conditionally released but have not yet been revised by the creator.

- **Archived Documents**:
  - the view shows all documents that have been moved to the archive.
- **Follow-ups**:
  - the view shows all active followups of the user.
- **Overview Downloads**:
  - the view shows all documents with download information

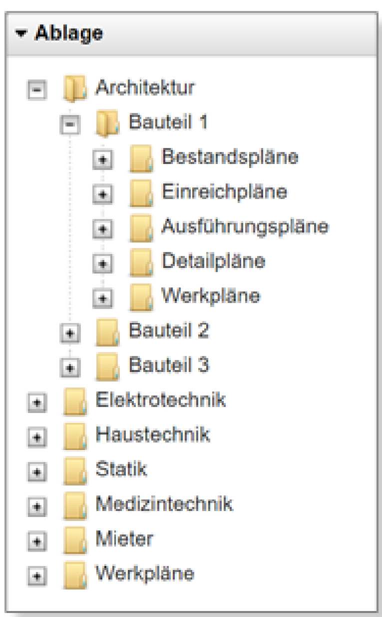
The documents of a view can be further filtered via the filing folders and keywords. The structure of the folders in document management and plan management can be organized up to 15 levels deep, and the number of filing folders is not limited.

Setting the Window Width

If the field for displaying the filing folders becomes too narrow, it can be enlarged with the mouse. To do this, move the mouse pointer to the right edge of the field until a double arrow appears. Now hold down the left mouse button and drag the field to the right until the required size is reached.

Alternatively, the window width can also be defined in the personal profile, the set value will take effect with the next login and will be the default setting in the future.

Drop



By clicking on a filing folder, only those documents that are assigned to this folder are displayed, regardless of which of the subfolders they are located in.

This allows you to search for documents in a folder without knowing which of the subfolders contains the documents you are looking for.

Details on how to search for documents, including the filing folders, can be found in the chapter "**4**.

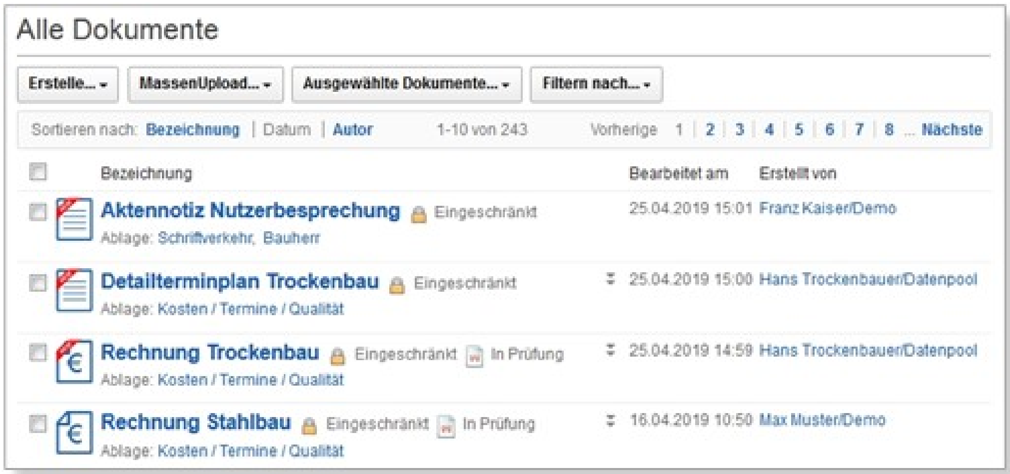
> **TIP**
>
> To open a filing folder without the documents already being filtered, click the square with the plus sign to the left of the filing folder. The folder level opens and the folders below it are displayed.

As a third element for filtering data, **clouds** with **keywords** are available in the Tag Data Pool . Depending on the frequency of the terms used, they are displayed in the Tag Cloud in different sizes. If the mouse pointer is hovered over a term without clicking on it, the number of available documents is also displayed.

In addition to the public keywords, each user has access to a tag cloud with personal keywords – so-called **post-its** . This feature gives you the ability to assign personal keywords to any document in order to structure relevant documents.
The personal keywords are not visible to other users in the system.
Details on how to search for documents including keywords can be found in the chapter "**4**.

The Data Area

The filtered documents are displayed in the data area. By default, it is sorted by the date of the last save, with the most recent documents arranged at the top. Alternatively, you can also sort alphabetically by the name of the documents and by the author.



In the data area, document containers can be opened to view details, download file attachments, or add personal keywords. Clicking on the name of a document opens the container.
Unread documents that have not yet been opened are marked with a red banner that says "**NEW**".

As an alternative to opening a document, the view can also be expanded to download file attachments. To expand a document, click the double arrow next to the edit date.
The details of the document with the existing file attachments are displayed, and clicking on the file name starts the download of the file attachment.

> **TIP**
>
> After opening a document, you can use the "**Close**" button to return to the last view. The most recently set filters for selecting documents are restored by the system and do not need to be set again. Alternatively, you can use the browser's "**back**" button to return to the last view without losing the last filters you used.

Authorization system and data protection

Access to documents and plans in the data pool is controlled by an authorization system that allows individual assignment of read and edit rights per document.
Depending on the settings in the system, the authorization is assigned by the creator when creating new documents or assigned by the system according to the storage folder.

> ⚠ **CAUTION**
>
> The data pool meets all legal requirements of the new EU General Data Protection Regulation. The data pool serves only as a carrier medium, the stored data is the property of the respective creator. With the exception of the system administration, there are therefore no users in the system who can automatically read all documents. Before saving, every user can check which people have read or edit rights to the document.

The access rights to the new document can be set in the "**Permission**" section . The creator of the document is automatically listed in the permissions section and cannot be removed from the list. The "**Add People**" and "**Add Groups**" buttons can be used to select additional people or groups of people who have access to the document.

In addition to the read permission, click on the radio button to optionally assign write permission or full access to each entry. People with full control have the same rights as the creator of the document and can change the permission and create a new version in addition to editing the document.

If a person or group has been added by mistake, the entry can be removed from the list. To remove an entry, select the row in question in the checkbox to the left of the entry and click the "**Remove selected**" button

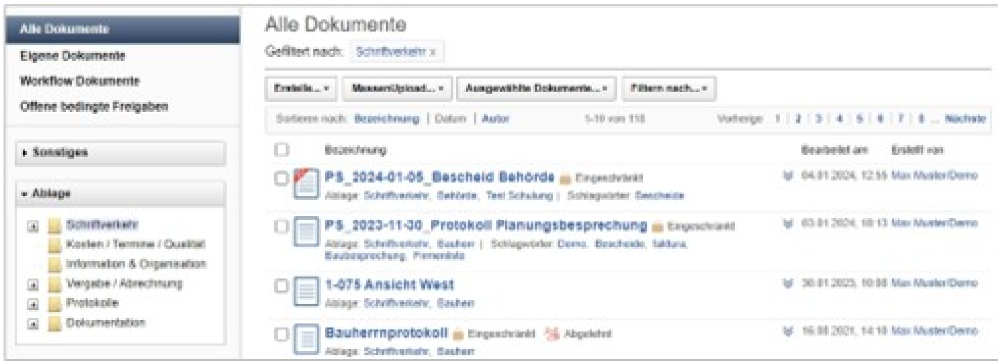
Changes to the authorization are not documented until the document is saved for the first time, any further changes by authorized persons are documented in the processing log and can be viewed by all authorized readers of the document.

Search for Documents

The data pool provides extensive functions for searching for documents that are very easy to use. The search options for the filing folders and the public and private keywords can be linked to the full-text search and the search by date or person.

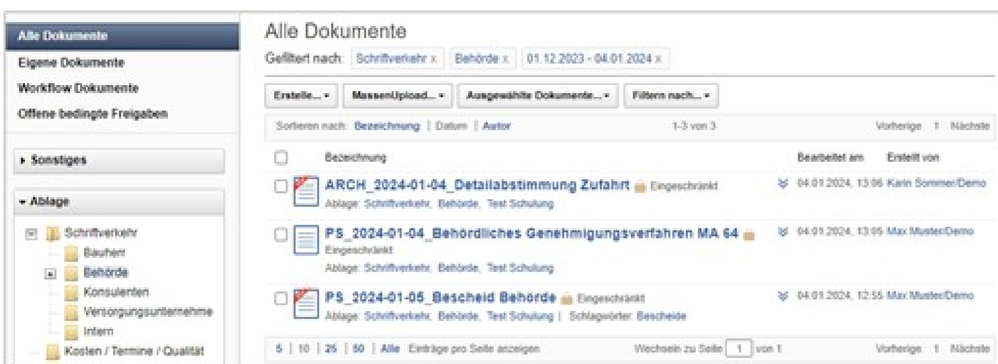
Search in filing folders

To display documents of a specific filing folder, select the folder in question with one click. The corresponding documents are displayed in the data area, and the current filter is in-cluded in the header.



If the search result is still too large, further selection criteria such as keywords, full-text search or filters by date and persons can be selected. Alternatively, you can click directly on the links of the displayed documents to refine the search. As an active link, filing folders, keywords and authors are displayed there.

The search filters can be combined with each other as desired, the list of filters used is dis-played in the header. If a filter is no longer needed, it can be removed from the list by cli-cking on the "x", and the displayed documents are updated automatically.



When selecting a new main folder, all existing filters are deleted and the new filter is displayed in the header. If you want to end the search, click on the "**All documents**" view. All existing filters will be cleared and the system will return to the default display.

Search for keywords

To display documents with a specific keyword, the relevant keyword must be selected in the Tag Cloud with one click. The corresponding documents are displayed in the data area, and the current filter is included in the header.

If the search result is still too large, further selection criteria such as filing folders, full-text searches or filters by date and persons can be selected and combined with each other as desired. The list of filters used is displayed in the header, individual filters can be removed there if they are no longer up-to-date. Selecting a filing folder deletes all existing filters, so searching for documents or plans should always start with selecting the filing folder.

Alternativ zur Tag Cloud können die Schlagworte durch einen Klick auf die Schaltfläche am unteren Rand auch als Liste angezeigt werden. Die Tag Cloud zeigt die 30 am häufigsten verwendeten Begriffe, unter der Option „**Alle**“ können sämtliche Schlagworte eingeblendet werden, die dann in einem eigenen Dialogfeld angezeigt werden.

As an alternative to Tag Cloud, the tags can also be displayed as a list by clicking on the but-ton at the bottom. The Tag Cloud shows the 30 most frequently used terms, under the "**All**" option all keywords can be displayed, which are then displayed in a separate dialog box.

In addition to the public keywords, each user has access to a tag cloud with **personal post-its** . This feature gives you the ability to assign personal keywords to any document in order to structure relevant documents. The personal tags are not visible to other users in the system.

TIP

The keywords in the tag clouds are also filtered when a filter is set, so only those keywords are displayed that also occur in the filtered subset of documents.
Selecting another keyword from the tag cloud refines the search result by one level.

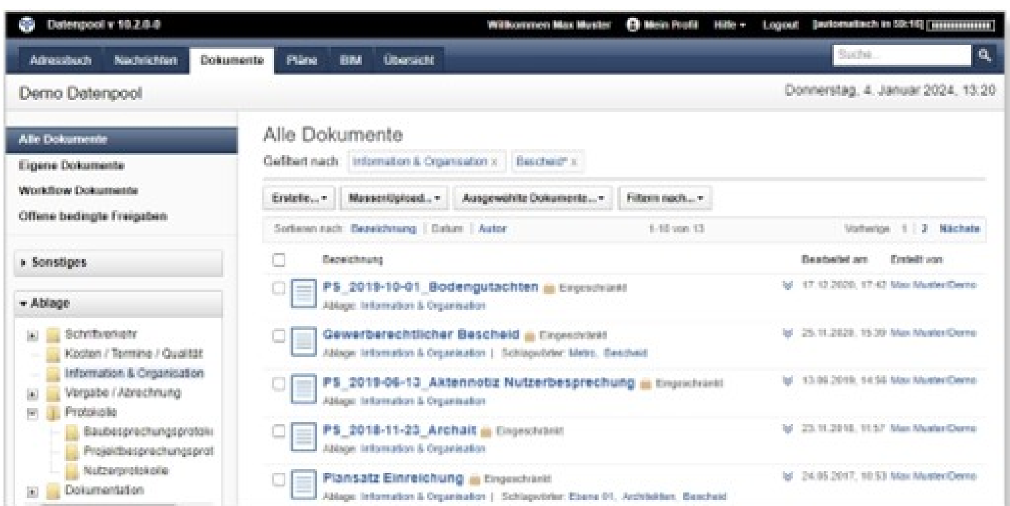
Full-text search

As a further search function, a full-text search is available in the data pool, which can be combined with the other search functions as desired. The entered term is also searched for in all documents and file attachments that provide ASCII text during the full-text search.

SEARCH WITH FULL TEXT

Search for documents with the full-text search:

1. In the search box at the top right, enter the term you are looking for.
2. Click on the magnifying glass or press the "**Enter**" key to start the search process
3. The view displays all documents that contain the search term. The header displays the filter with the searched term.
4. If the search result is still too large, repeat steps 1 to 3 with another search term. The view displays all documents that contain both search terms.
5. If a search term does not produce the desired result, it can be removed from the list of filters by clicking on the "**x**".



TIP

If the exact name of the searched term is not known, a placeholder can also be used in the full-text search. The asterisk `"*"` is used as a placeholder. The search term `"bescheid*"` finds all compound words that begin with the term `"bescheid"`. The wildcard can be used both before and after a term.

The search term `"*bescheid*"` finds all compound words that contain the letter combination `"bescheid"`, regardless of whether there are other letters before or after the term.

Search by document type

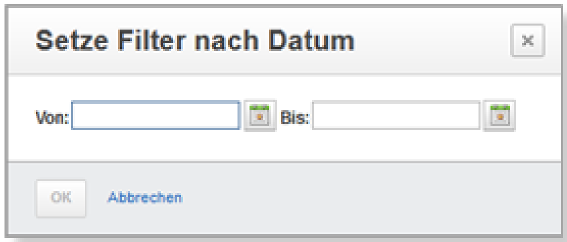
To display documents that correspond to a certain type, select the function "**Filter by ... - Document type**" in the header. The desired document type can be selected in the dialog box. The "**OK**" button completes the entry and starts the search.

The search result is displayed in the data area, and the header includes the current filter. The search by document type can be combined with all other search functions as desired.

Alternatively, you can click on the icon of the document type you are looking for in the view. The selected document type is displayed in the data area.

Search by date

To display documents that were created on a specific date, select the "**Filter by ... - Date**" function in the header. In the dialog box, select the desired time period for the search. The "**OK**" button completes the entry and starts the search.



Documents created in the specified time period are displayed in the data area, and the header includes the current filter. The search by date can be combined with all other search functions as desired.

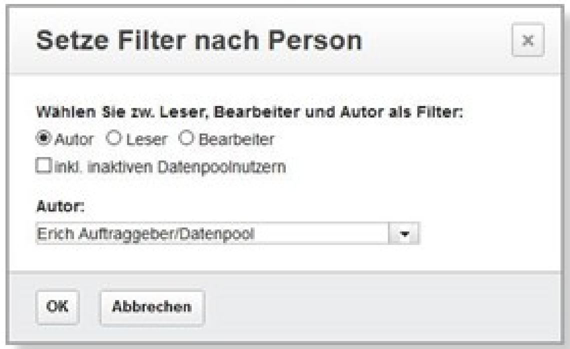
Search by Workflow Status

To display documents that have a certain status in the workflow, select the "**Filter by ... - Workflow Status**" function in the header. In the dialog box, select the desired workflow status for the search. The "**OK**" button completes the entry and starts the search.

All documents that correspond to the selected status are displayed in the data area, and the current filter is included in the header. The search by workflow status can be combined with all other search functions as desired.

Search by Person

To display documents that have been created by a specific user or can be read or edited by him, select the "Filter by ... - Person" function in the header. In the dialog box, select the desired authorization and the desired user for the search. The "OK" button completes the entry and starts the search.



All documents that can be read by the selected user and to which you also have access yourself are displayed in the data area, and the current filter is carried in the header. The search for readers can be combined with all other search functions as desired.

It may be necessary to search for documents from a person who is no longer active in the project. In this case, the option "**incl. inactive data pool users**" must be activated in the dialog box. In the pull-down menu, all persons who are no longer active in the project are then available for selection.

Search by Permission Group

To display documents that can be read or edited by a specific group of people, select the "**Filter by ... - Group**" function in the header. In the dialog box, select the desired authorization and the group you are looking for for the search. The "**OK**" button completes the entry and starts the search.

All documents that can be read by the selected group and to which you also have access yourself are displayed in the data area, and the current filter is carried in the header. The search for readers can be combined with all other search functions as desired.

Search by Author

To view documents created by a specific author, click the name of the desired author on the right edge of the data area.
All documents created by the selected author and to which you have access yourself are displayed in the data area. The current filter is included in the header, the search by author can be combined with all other search functions as desired.

Working with documents

The data pool serves as a platform for the creation and distribution of documents. Each user can create and edit documents and upload and download file attachments. Editing is only possible for those documents that the user has created himself, unless the right to edit a document has been expressly granted by another user. All other documents can only be opened in read mode.

The data pool is document-proof, so it is not possible to delete documents. Documents that are no longer relevant or were created in error must be moved to the archive.

In addition to simple documents, there are also qualified documents in the data pool that have a review and approval workflow. Only when the workflow has been run through and approval has taken place are these documents available to the other users.

The data pool processes any file format, and up to 50 attachments can be uploaded in a container. The maximum file size per attachment is 1 gigabyte, the maximum size per container is 2 gigabytes.

Download files

The data pane displays all documents that are available to the user in the data pool. To open the contents of the documents, the corresponding file attachments must be downloaded.

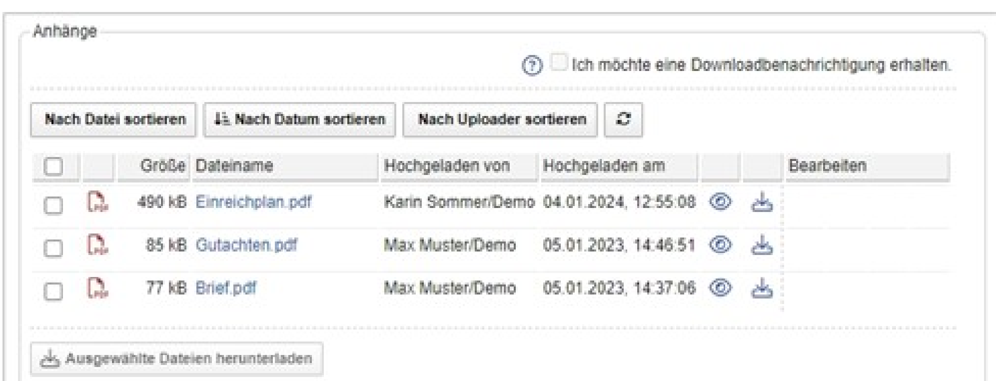
DOWNLOAD INDIVIDUAL FILES

To download individual files from the data pool:

1. Search for the desired document in the view using the filing folders and search functions.
2. Click the document label to open it, or expand the row in the view by clicking the double arrow to view the details.
3. Click on the name of the attachment you are looking for to start the download.
4. Repeat step 3 for all desired engagers.
5. Close the document after the last download by clicking on the "**All documents**“

If you want to download several attachments of a container together, select the desired files and click on the "**Download selected files**" button. The attachments are summarized in a zip file and downloaded together. A dialog box displays the file name for the zip file and can be changed if necessary.

In the dialog box, you can also specify whether the attachments should be downloaded with or without a storage folder.



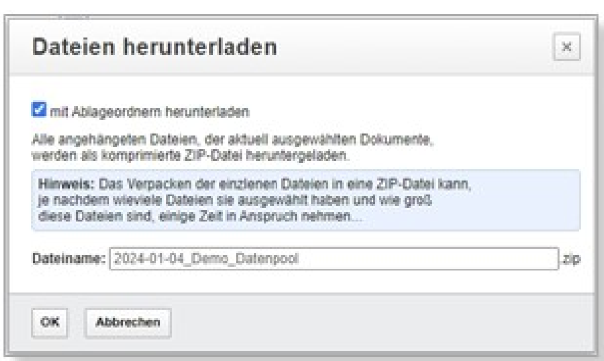
In addition to downloading individual files, it is also possible to download up to 25 containers as a bulk download in one go. The attachments of the marked containers are combined into a zip file and downloaded together.

If desired, the storage folders of the marked documents can be stored in the zip file, so that the attachments are organized in the same folder structure as they were stored in the data pool.

START WELDING DOWNLOAD

To start a bulk download with up to 25 documents:

1. Search for the desired documents in the view using the filing folders and search functions.
2. Select the desired documents by clicking in the box to the left of the label.
3. Start the bulk download by clicking on the "**Selected documents ...**" and the subitem "**Download**".
4. In the dialog box, click the checkbox to specify whether the attachments are to be downloaded with or without a storage folder.
5. In the dialog box, correct the name of the zip file for the bulk download if necessary and confirm the note with "**OK**".
6. All attachments of the selected documents are combined by the server in a zip file and the download is started.
7. Open the zip file to view the downloaded files.

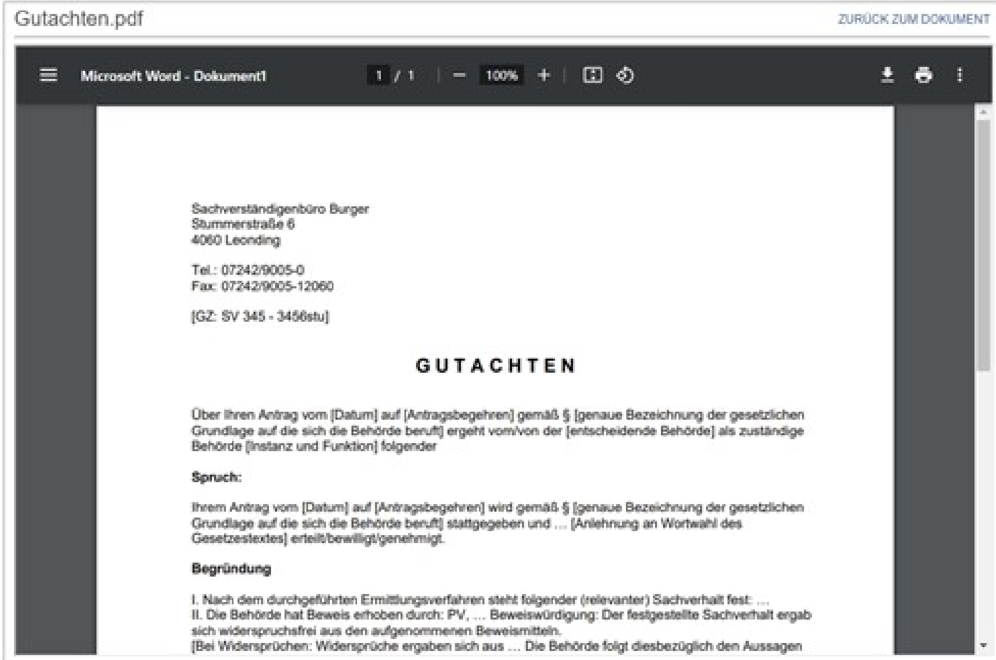


Displaying Files in the Online Viewer

As an alternative to downloading, files can also be viewed online in a viewer. Clicking on the eye icon on the right side of the line with the name of the document launches the viewer. The viewer is provided by the server and does not need to be installed on your computer or mobile device. The viewer supports the following formats: .pdf, .doc, .docx, .xls, xlsx, .ppt, .pptx, .jpg, .png, .gif.

VIEW FILES IN THE ONLINE VIEWER

To view files in the viewer:
1 Search for the desired document in the view using the filing folders and search functions.
2. Click the name of the desired document to open the container.
3. Click the eye icon in the row to the right of the desired file to view it in the online viewer.
4. The selected file will be opened in the online viewer.
5. The opened file can now be downloaded or sent for printing.
6. Close the viewer by clicking the "**Back to document**" on the right above the window that appears to return to the document.
7. Repeat steps 3 through 6 for all the attachments you want to display.



TIP

If you have opened a file via the online viewer, some functions are available in the header: by clicking on the printer icon you can send the document directly from the viewer to the printer, with the "**Download**" function you have the option to save the opened document to your local hard drive.

ACHTUNG

When you open a file with the online viewer, the process is logged in the edit log as a down-load. The opened file is then considered read!

Creating New Documents

To upload files to the data pool, a new container must be created. Depending on the configuration and range of functions, different document and plan types are available, which have different functions and designations. Depending on the user and project function, different document and plan types can be displayed in the data pool.

In addition to simple documents, there are qualified documents in the data pool that have a review and approval workflow. The range of functions of the documents depends on the predefined configuration and may vary depending on the project. In addition, documents may be available that contain additional input fields. Depending on the configuration, the saving process checks whether all relevant fields have been filled. A status message after saving informs you whether all required data has been entered.

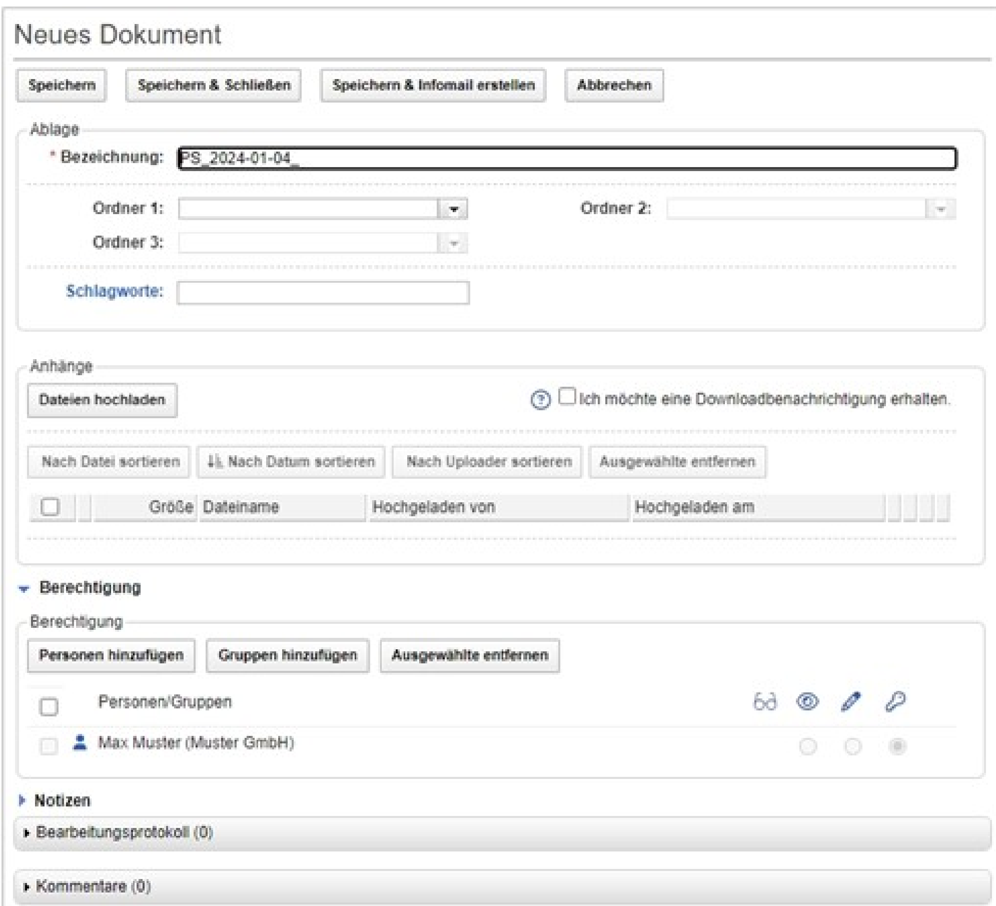
CREATE NEW DOCUMENTS

To create a new container to upload documents:

1. Click on the button "**Create...**" in the toolbar of the view and then click on the desired document type in the pull-down menu. The new container opens.
2. Enter the name of the new container in the "**Description**" one.
3. Set the drop folders for the new container.
4. Enter the relevant keywords or click on the existing keywords by clicking on the link "**Keywords**" and select the desired keywords.
5. Click on the button "**Upload files**" and drag and drop the desired files into the dialog box. Optionally, in the dialog box, you can choose the "**Select**" - in a separate window, the explorer will then open for the selection of the desired files. To select multiple files from Explorer, the "**Ctrl**" key must be pressed.
6. Close the Explorer window using the "**Open**" and start uploading all selected files by clicking on the "**Upload**".
7. Repeat steps 5 and 6 if you want to upload more files.
8. In the "**Eligibility**" firm which people and groups from the project team should have read access to the document. Optionally, you can also assign edit rights and full access rights for individual persons or groups.
9. In the "**Notes**" Add information to the document if necessary.

10. Save the new document by clicking the "**Save & Close**". Alternatively, you can enter the entries with "**Save & Send Infomail**" if you want to actively inform readers about the new documents.

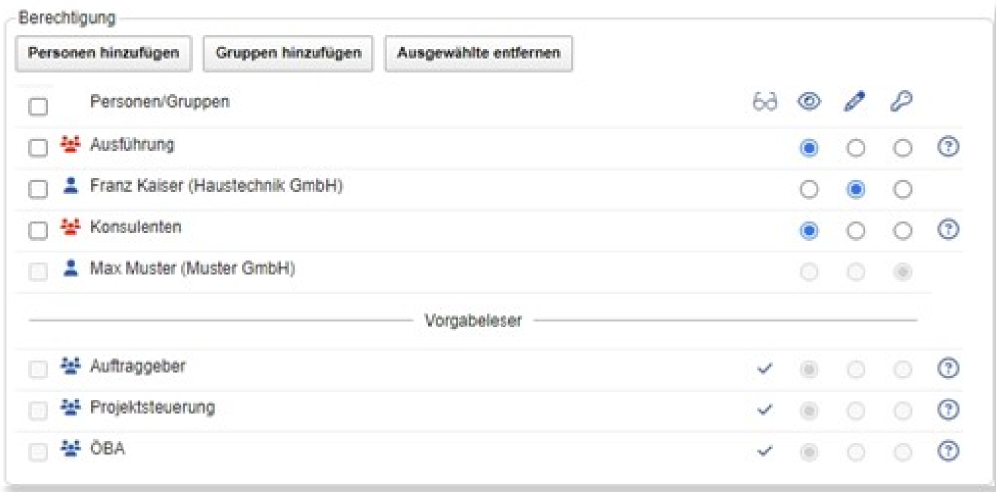
Depending on the function in the project, different document and plan types may be available. Document types that are not required are hidden from users to reduce the complexity of the system.



The following settings and functions are available when creating a new container:

- **Designation**:
  - The field is used to enter the name of the new container, which will be displayed later in the view.

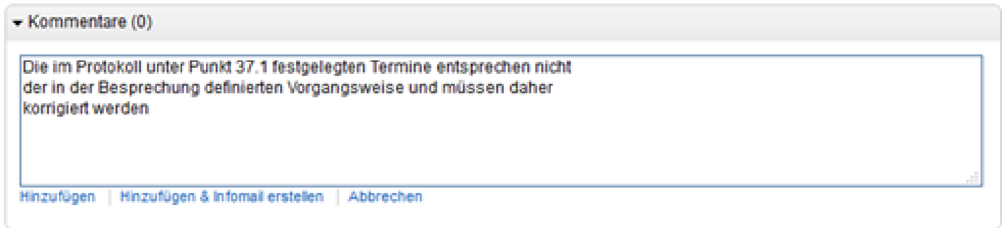
- **Filing**:
    - The field provides the preconfigured filing folders. Different folders can be selected for different users. When you select a folder, the system displays the possible subfolders.
- **Catchwords**:
    - The new document can be provided with one or more keywords. After entering the first letters, the system suggests existing keywords that can be adopted at the click of a mouse.
      By clicking on the label "**Keywords**", all available keywords are made available for selection in a dialog box.
- **Upload files**:
    - By clicking on the button "**Upload files**" the Explorer can be opened to select a file for upload. Alternatively, the desired attachments can also be dragged and dropped into the dialog box. After selecting the desired files, the upload is done via the "**Upload**" started. In Explorer, several files can be selected for upload by pressing the "**Ctrl**" key and the left mouse button at the same time.
      If a file has been uploaded by mistake, it can be removed by clicking on the trash can.
- **Infomail an**:
    - This function can be used to activate the sending of infomails to your own email address when files are downloaded.
- **Right**:
    - This section specifies the access rights to the new document. The creator of the document is automatically listed in the permissions section and cannot be removed from the list. Using the "**Add people**" and "**Add groups**" can be used to select additional people or groups of people who have access to the document, whereby people and groups can be combined as desired.
      In addition to read permission, write permission or full access can also be optionally assigned. People with full control have the same rights as the creator of the document and can change the permission and create a new version in addition to editing the document.
      Selecting groups of people gives you the ability to set access for project participants, even if they join the project team at a later date.
- **Default reader**:
    - This field shows groups of people who already have access to the document based on the configuration, without having to manually select them. Removing default readers is not possible.



The colour coding of the persons and groups of people provides information about the current access rights. A blue flag indicates read access, green icons indicate full access, and people with a red icon do not currently have access to the container.

- **Notes**:
  - In this field, information about the document can be entered, which is also transmitted to the recipients when the infomail is sent.
- **Save**:
  - Using the "**Save**", the new document can be saved.
- **Save & Close**:
  - This function saves the document and returns to the previous view.
- **Save & Create Infomail**:
  - This feature saves the document and sends an Infomail to the selected readers and editors of the document. The system opens a dialog box in which the desired recipients can be selected and an info text can be entered.
- **Processing log**:
  - All essential activities related to the document are stored in the processing log. This makes it possible to trace later when the document was saved, distributed, checked or approved. In addition, every download of attachments from the container is documented in the processing log.
- **Comments**:

- By clicking on the "**Add Comment**" a new comment is created. The feature is available once the container has been saved. After entering the text, the comment can be added by clicking on the button and, if necessary, distributed to specific people by infomail. The desired recipients are selected in a dialog box after clicking on the button "**Add and create Infomail**".

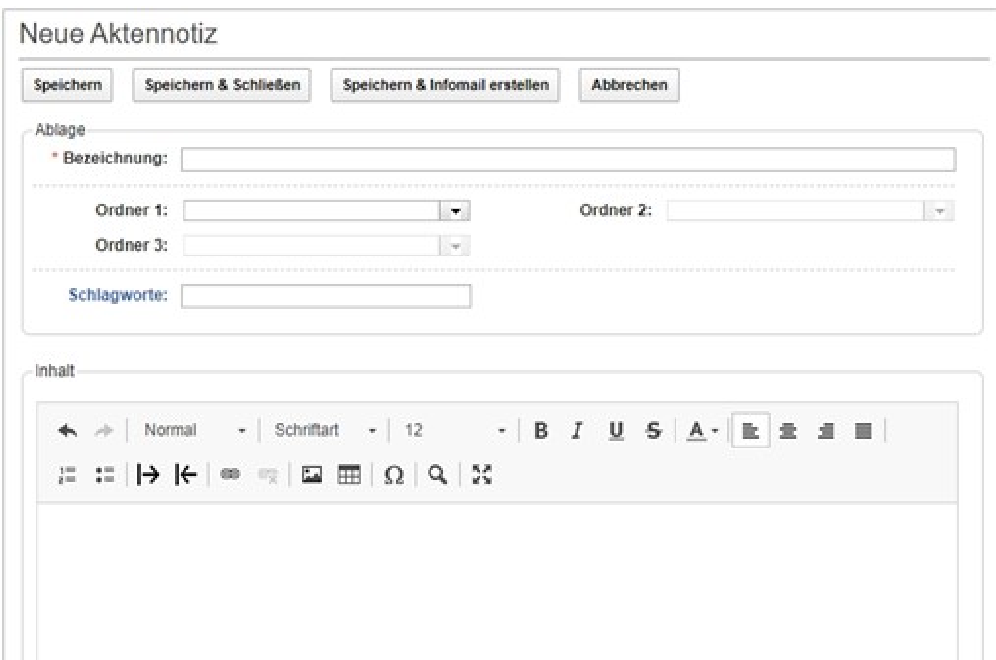


Creating a New Note

The note or file note is a special document that allows for easy communication within the project. Unlike mail, which is used to communicate with external people, the note is used to communicate with the members of the project team.

Unlike all other documents, the note has a text field that allows text to be entered directly and thus allows for easy documentation of facts or tasks. With the "*_Save and send Infomail_" function , the file note is distributed to the selected recipients and thus officially delivered, which is also documented in the processing protocol.

Depending on the configuration, the file note may also include a section for uploading files, which are then available for download.



TIPP

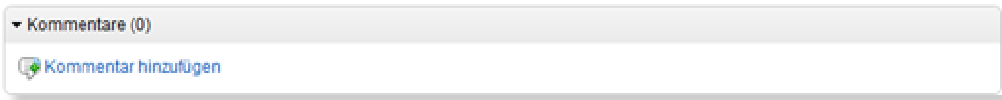
The file note is the right choice for communication in the project team, as it offers many advantages compared to e-mail. This means that the file note can be created and stored immediately in the document management, there is only one original and the relevant recipients are entered via the authorization and notified by infomail. All activities are documented in the processing protocol and result in clear traceability of the processes even after a long time.

The e-mail is primarily used to communicate with external persons who do not have access to the data pool. Details on how to store important e-mails can be found in the chapter "**7**.

Creating a New Comment

A comment function is available for documents and plans, which makes it possible to link additional information to the document. In contrast to notes, which can only be created by the creator and any editors, all project participants have the option of creating a comment.

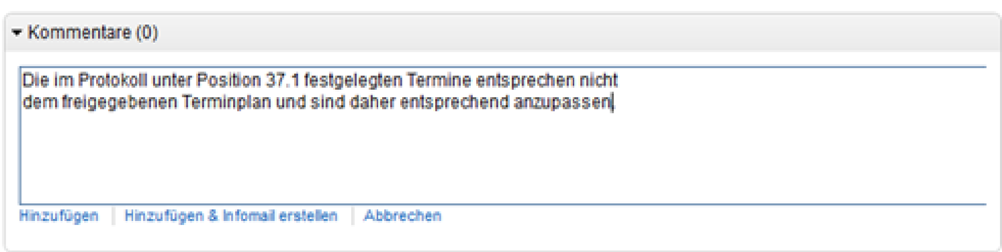
A new comment cannot be created until the document has been saved. Comments can be replied to with a new comment, creating a discussion history that is directly connected to the document.

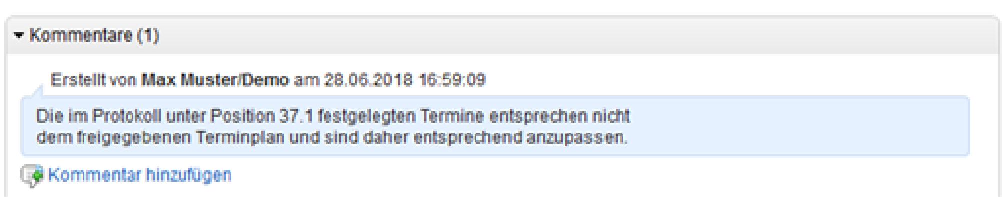


CREATE A NEW COMMENT

To create a new comment in an existing document:

1. Open the desired document by clicking on the label in the view.
2. Scroll your mouse to the bottom of the document.
3. Open the "**Comments**" and click on the "**Add comment**".
4. Write your comment in the text box.
5. Close the input by clicking the "**Add**". Alternatively, you can add important comments using the "**Add & Create Infomail**" directly to the relevant people. The desired recipients are selected in a separate dialog box.
6. When the input is complete, the system is ready for a new comment.





TIPP

When you enter text with "**Enter**" to the new line, the system inserts a paragraph and the line spacing is 1.5 lines.

To get a simple line spacing, you have to switch to the new line with the key combination "**Shift**" and "**Enter**". This does not insert a paragraph, but a simple line spacing.

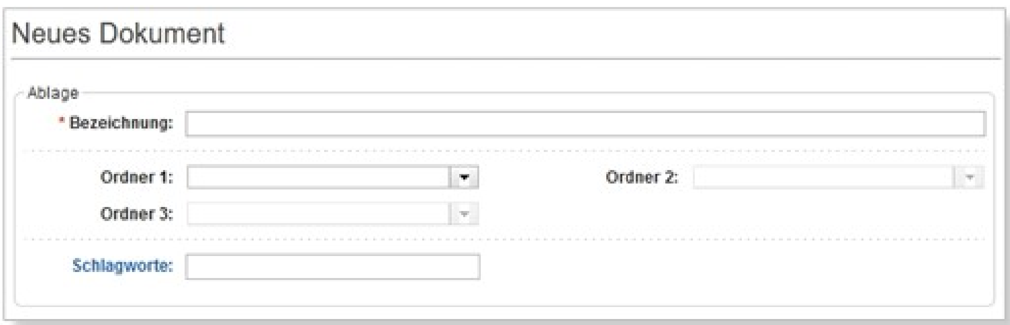
Selecting a File Folder

When creating new documents, all filing folders must be filled, otherwise there will be an error message when saving the container. The folders are organized as tags that are stored with the container and can therefore also be found via the search function.

The data pool supports users in selecting filing folders, and there are three possible scenarios:

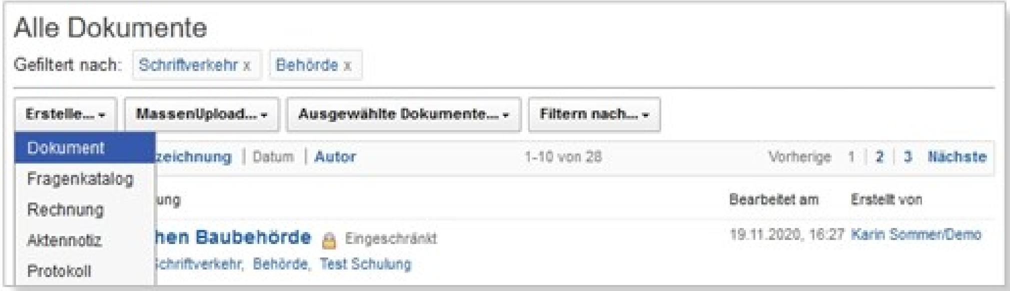
1. Documents without a default folder – no filing folder selected

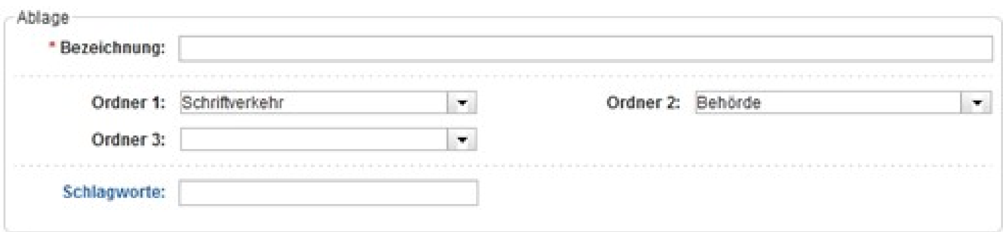
- If no filing folders were selected in the navigator when creating a new document, the corresponding fields in the new document are empty and must be filled in by the user.



2. Documents without Default Folder – File Folder Selected

- If a file folder was selected when a new document was created, these folders are auto-matically populated in the new document. The entered folders are default values and can be overwritten if necessary.





3. Documents with default foldersI

- In the document configuration of the data pool, storage folders can be preconfigured for different document types. When a new document is created, the filing folders are automatically filled with the predefined values. The entered folders are default values and can be overwritten if necessary.

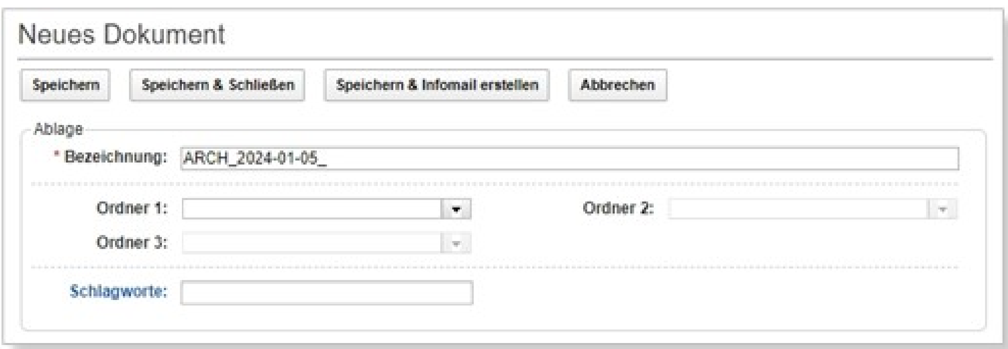
Default Values for the Document Label

To simplify the creation of documents, default values for the document label can be defined in the data pool. The default value can be made up of, for example, the current date and the short name of the trade, as defined in the personal profile (see 13. Settings in the personal profile).

For each user in the system, an individual default value is created, which can then be supplemented by any text:

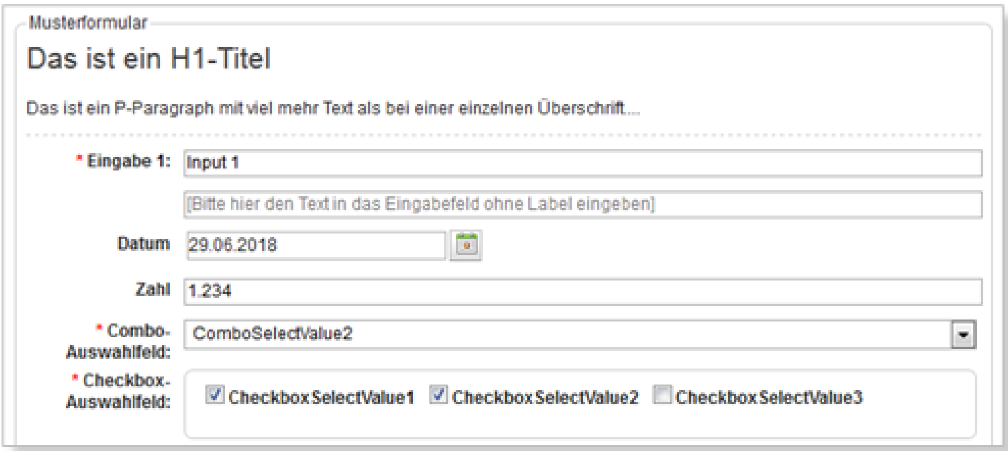
Default value = short name user + date + free text

The individual text blocks are connected by an underscore in the default value. If the default value is not needed in a document, it can simply be deleted and replaced by free text.



Forms

Each container in the data pool can be supplemented with additional input fields that can be individually adapted to the requirements of the project. Various field types are available, which can be combined with each other and supplemented by description texts.



CAUTION

The optional input check checks whether all relevant fields have been filled in when saving. The status message in the header of the document provides detailed information about the required inputs.

Bulk File Upload

In addition to uploading individual files, automatic uploads of a larger number of attachments can also be carried out in the data pool.
The selected files are analyzed by the system and combined into groups if files with the same file name are in the selection. A new container is created for each of the selected files and the defined filing folders and the specified keywords are adopted. The file name is used as the document name.
If there are several files with the same file name and different file extension, they are automatically combined in a container.

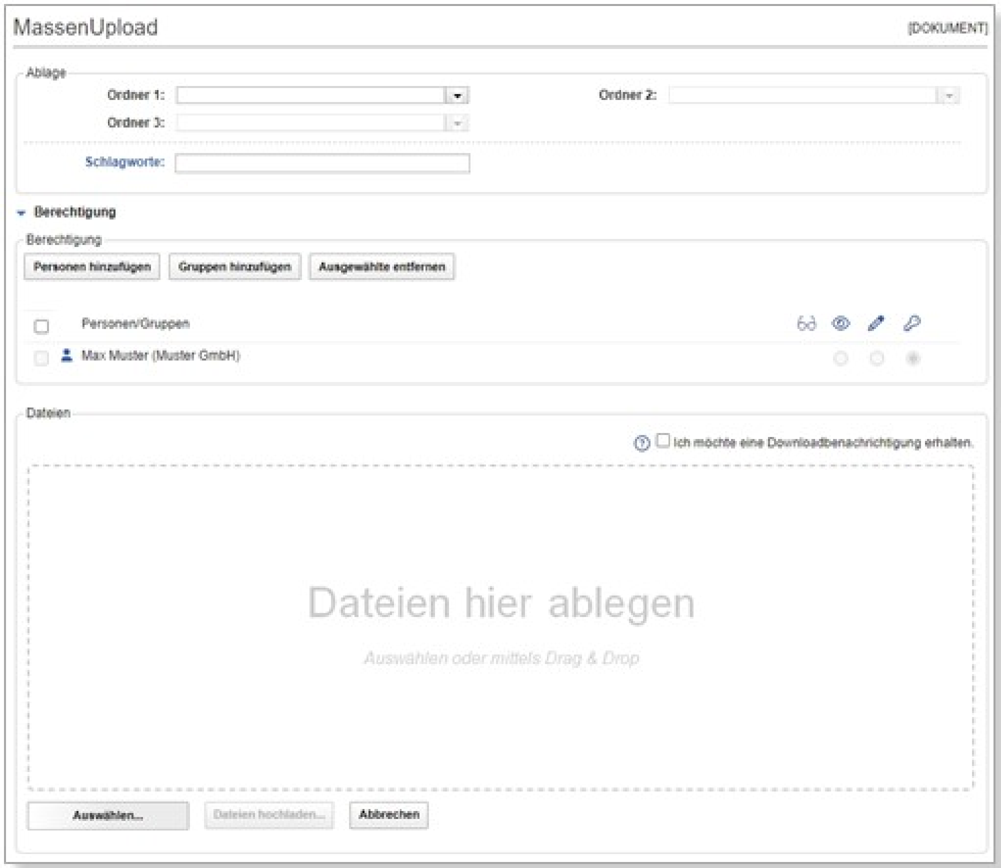
PERFORM BULK UPLOAD

To perform a bulk upload to the data pool:

1. Click on the button "**Massenupload**" in the header of the data pool and select a document type.
2. Specify the filing folders for the new documents.
3. Enter the relevant keywords or click on the existing keywords by clicking on the link "**Keywords**" and select the keywords you want.
4. In the "**Eligibility**" select the people and groups who are to have access to the documents. Alternatively, it could also assign editing rights or full access rights to the document. Please note that for documents and plans with workflows, read rights are restricted during the review run.
5. Drag and drop the desired files from the Explorer into the storage field. Alternatively, you can click the "**Select**" and select the desired files in Explorer in the dialog box that appears. Copy the selected files from Explorer by clicking on the "**Open**". To select multiple files from Explorer, you need to hold down the "**Ctrl**" key.
6. Start the upload by clicking on the button "**Upload files**". You can follow the progress of the uploads in the graphic.

ACHTUNG

Bulk upload cannot be used in conjunction with the versioning of documents or plans. If an existing document is to be versioned, the currently valid version of the document must be opened to create a new version.



DETAILS ZUM MASSENUPLOAD

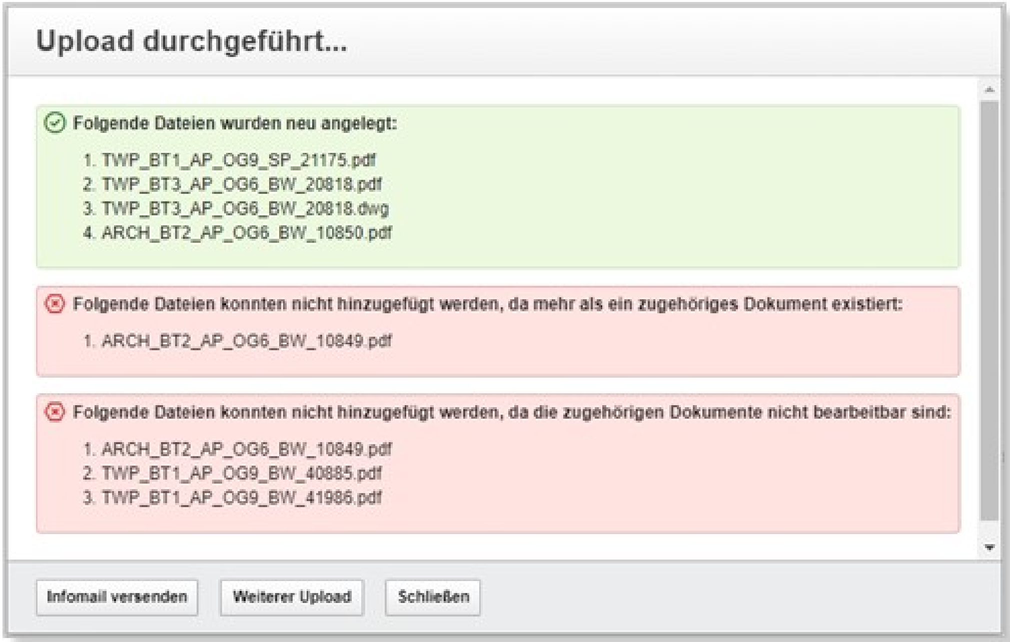
During the loading process, the system checks the files and groups them if files with the same file name are in the selection (regardless of the file extension). Only one new container is created for each group.

In addition, the system checks in plan management whether there are already plans whose names match one of the new plans. If there are no plans with the file name, a new container is created.

If a document with the same name is found, the system checks whether the document can be edited by the user and whether there is a file with the same file extension. If no matching file extension is found, the selected file is added to the existing document if the user is allowed to edit the document.

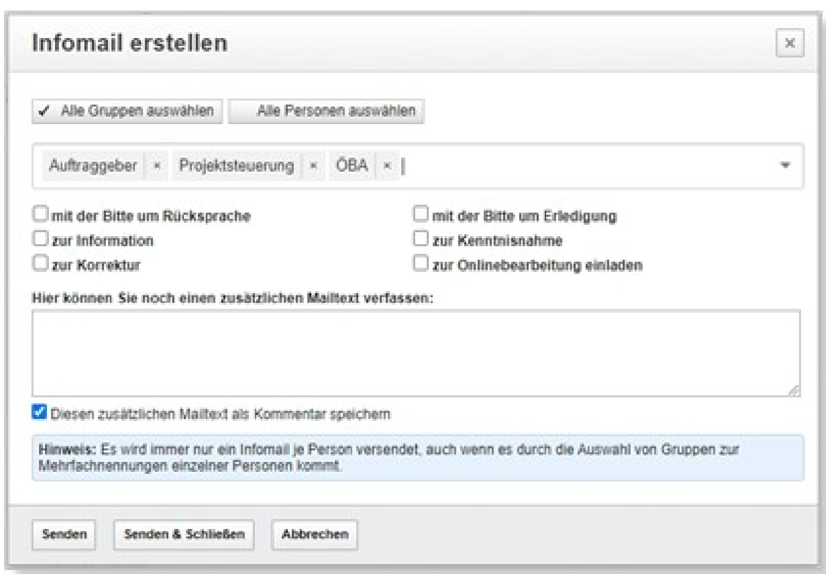
If a file with the same file extension already exists or if the user is not allowed to edit the document, the loading process is aborted and a corresponding status message is displayed.

If several documents with the same name are found, the loading process is immediately aborted and a corresponding status message is issued.



In the dialog box with the upload status messages, you can check whether the selected attachments have been uploaded.
If further attachments are to be uploaded, a new mask for the upload can be opened immediately via the "**Further upload**" button.

The "**Send Infomail**" button can be used to send an infomail for the uploaded attachments. The system opens a new dialog box in which the desired recipients can be selected.



The recipients receive only one infomail with the list of all uploaded attachments per mass upload. With the infomail, an individual text can also be sent, which is then saved as a comment with the containers.

Editing Documents

Documents without a workflow can be edited by the creator at any time, and editing rights can also be assigned to third parties in the authorization section. Documents with workflow can only be edited as long as the workflow has not yet started. In addition to the file attachments themselves, the name of the document, the filing folders or the permission can also be changed.

If the workflow has already been started, the document can no longer be changed by the creator, and only the active reviewer has editing rights. All changes are documented in detail in the processing log, which gives all users the certainty that files that have been uploaded and checked via the workflow will be reproduced unaltered later on, thus creating consistent documentation.

Documents with workflow cannot be deleted after the review is complete. If shared documents are no longer relevant, they must be moved to the archive using the "**Archive**" function. Documents with a completed workflow can only be archived by the creator and editors with full control. If archiving rights are also required, these can be assigned to specific persons by the system administrator.

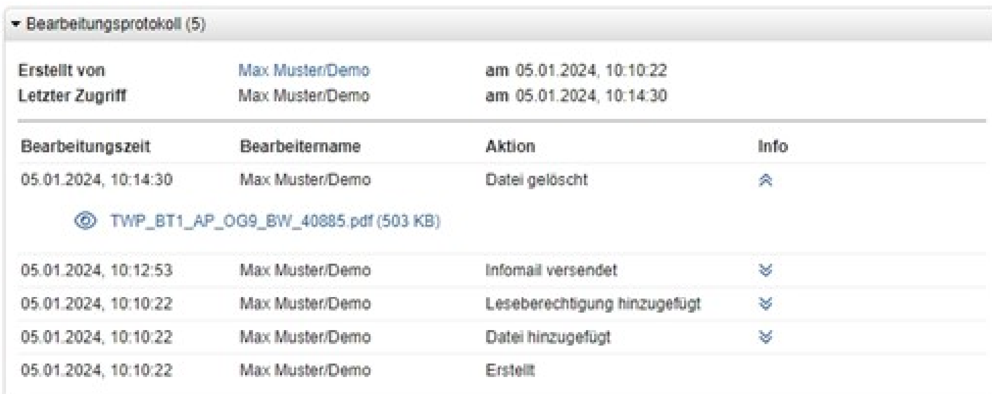
> **EDIT DOCUMENTS**
>
> To edit existing documents in the data pool:
>
> 1. Find the document you want to change in the view using the filing folders and search functions.
> 2. Open the document by clicking on the label.
> 3. Click the "**Edit**“.
> 4. Make the changes you want.
> 5. Save the changes by clicking the "**Save**" or "**Save & Close**" or "**Save & send infomail**“. The change is complete.

The following items can be edited in an existing document:

- Designation
- Drop
- Catchwords
- Attachments
- Permission section
- Notes

Changes in a document can only be made by the creator. If the document is also to be edited by other people, they must be entered as authorized editors or as editors with full access. In contrast to authorized editors, it is also possible to change the authorization and create new versions with full access rights.

> **CAUTION**
>
> Relevant changes in a document are documented in the processing log and can be viewed by all users. In addition to saving the document, changes to the authorization and file attachments are recorded in the editing log.
> When deleting file attachments, they are moved to the recycle bin, and a corresponding entry is created in the processing log with the link to the deleted file. This ensures that no manipulation is possible.



Distributing Documents

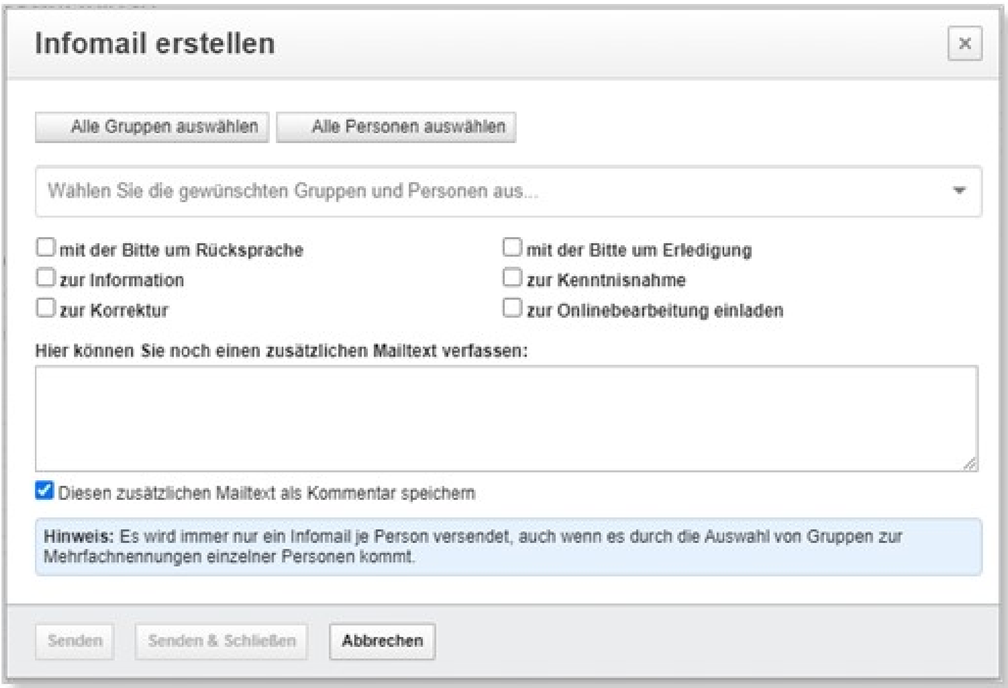
Each new document can be distributed to eligible readers at the time of creation to draw attention to new information or changes. In addition, documents can also be distributed at a later date, whereby the recipients can be selected individually.

DISTRIBUTE DOCUMENTS

To distribute documents to people in the data pool via infomail:

1. Search for the document that is to be distributed by Infomail in the view using the filing folders and search functions.
2. Open the document by clicking on the label.
3. Click the "**Create Infomail**“.
4. In the dialog box, select all the people or groups to whom you want to send the infomail. By clicking on the names of the people or groups, they are added to the selection. To select all persons or groups, click on the "**Select all persons**" or "**Select all groups**“.
5. If necessary, select a short message by clicking the checkbox.
6. If necessary, enter a message in the text field to be sent with the Infomail. By default, this message is created as a comment in the container when it is sent.
7. Clear the check box if you do not want the entered message to be saved as a comment in the container.
8. Close the input by clicking the "**Send**" or "**Send & Close**" Off. The infomail with the captured text is sent to the selected persons and the process is documented in the processing log.

The feature of distributing is available for all documents and plans, regardless of whether you created the document yourself or if you are only authorized to read it. By selecting the desired persons, you can individually determine which persons are actively informed by infomail and which persons only receive read rights.


Infomail erstellen
Alle Gruppen auswählen
Alle Personen auswählen
Wählen Sie die gewünschten Gruppen und Personen aus...
mit der Bitte um Rücksprache
mit der Bitte um Erledigung
zur Information
zur Kenntnisnahme
zur Korrektur
zur Onlinebearbeitung einladen
Hier können Sie noch einen zusätzlichen Mailtext verfassen:
Diesen zusätzlichen Mailtext als Kommentar speichern
Hinweis: Es wird immer nur ein Infomail je Person versendet, auch wenn es durch die Auswahl von Gruppen zur Mehrfachnennungen einzelner Personen kommt.
Senden
Senden & Schließen
Abbrechen

Sending documents and plans externally

A special function is available for communication with external persons without access to the data pool, which also allows very large files to be sent. Only a link is sent to the external person, which can then be used to download the selected file. Individual attachments can be up to 1 gigabyte in size, and the total file size of all files is not limited.

The sent link for downloading the files is valid for one month, after this time the data will be deleted from the download area and will no longer be available to external persons. The links sent are not personalized and can be used by any recipient of the mail, even if the mail has been forwarded.

Send individual documents and plans externally

If you want to send individual attachments from a container to an external person who does not have access to the data pool, open the desired container to start the function.

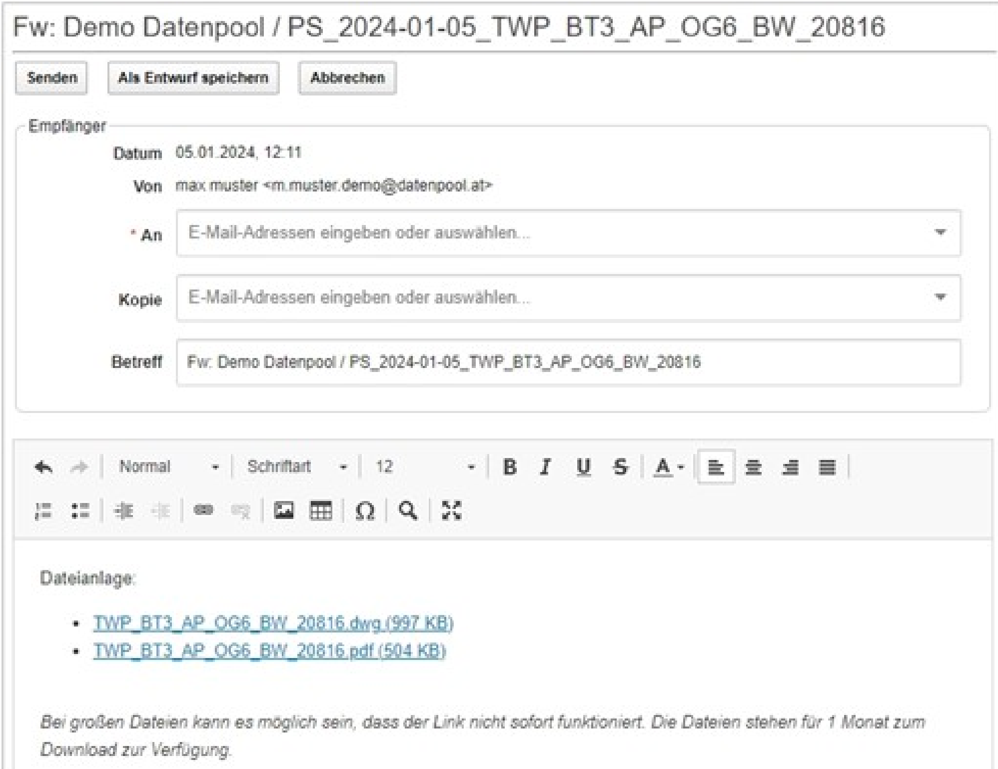
SEND INDIVIDUAL DOCUMENTS AND PLANS EXTERNALLY

To send individual files to external people via link:

1. Open the container whose contents are to be sent to an external person by clicking on the label.
2. Click the "**Forward by mail**" at the top of the container. In the next step, specify whether the existing comments should be sent with the e-mail. A new email is created in the system, which already contains the links for downloading the attachments and the comments in the text area, if the option has been selected. If you do not want to send all links, they can be marked and deleted in the text area.
3. Enter the recipient's address and any additional text in the email.
4. If necessary, add further attachments from your explorer by clicking on the "**Attach File**". These attachments are sent as attached files with the mail.
5. Send the e-mail by clicking on the "**Send**".

When the e-mail is sent, the associated attachments are moved by the system to a separate download area, where they are kept for download for one month. For very large files, this process can take a few minutes, and this circumstance is pointed out in an info text in the e-mail.

The recipient can start downloading the files directly via the links in the e-mail. It is not necessary to enter a login or password. There is a maximum limit of 1 gigabyte for the size of individual files.



Send multiple documents and plans externally

For sending several documents and plans to external persons, a separate function is available with which you can send attachments from different containers together. Because not the attachments themselves, but only a download link is sent, even very large files can be sent to external persons.

SEND MULTIPLE DOCUMENTS AND PLANS EXTERNALLY

To send engagers from multiple containers to external people:

1. Select those containers in the view that are to be sent to an external person.
2. Click the "**Selected Documents - Forward by Mail**" in the view's toolbar. In the next step, specify whether the existing comments should be sent with the e-mail. A new email is created in the system, which contains the links of all attachments of the selected containers in the text area. If you do not want to send all links, they can be marked and deleted in the text area.
3. Enter the recipient's address and any additional text in the email.
4. If necessary, add further attachments from your explorer by clicking on the "**Attach File**". These attachments are normally sent as attached files with the mail.

> 5. Send the e-mail by clicking on the "**Send**".

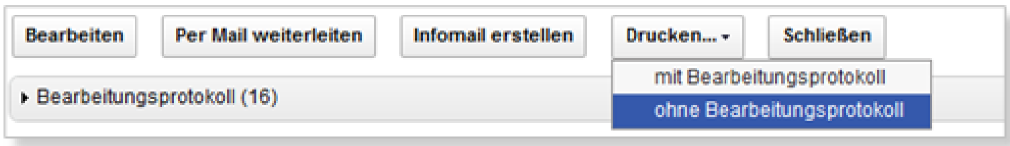
When the e-mail is sent, the associated attachments are moved by the system to a separate download area, where they are kept for download for one month. For very large files, this process can take a few minutes, and this circumstance is pointed out in an info text in the e-mail.

The recipient can start downloading the files directly via the links in the e-mail. It is not nec-essary to enter a login or password. There is a maximum limit of 1 gigabyte for the size of individual files.

Printing Documents

The "**Print...**" at the top of the opened container, all data of the container can be output as a pdf file and printed. The uploaded attachments in the container are not printed.

There are two options available for printing: the container can be printed with the entire processing log for documentation or as a simplified output without a processing log.



Versionning

With versioning, the data pool supports you in managing plans and documents and ensures that only the latest version is available in the view. Only one row is displayed in the view for each document or sheet, no matter how many versions have already been created.

In addition, it is possible to have a QR code printed by the system when uploading plans or documents, which can be used to check the status of the plan at any time using smartphones. This makes it possible to determine in real time, even on the construction site, whether an existing plan is still valid.

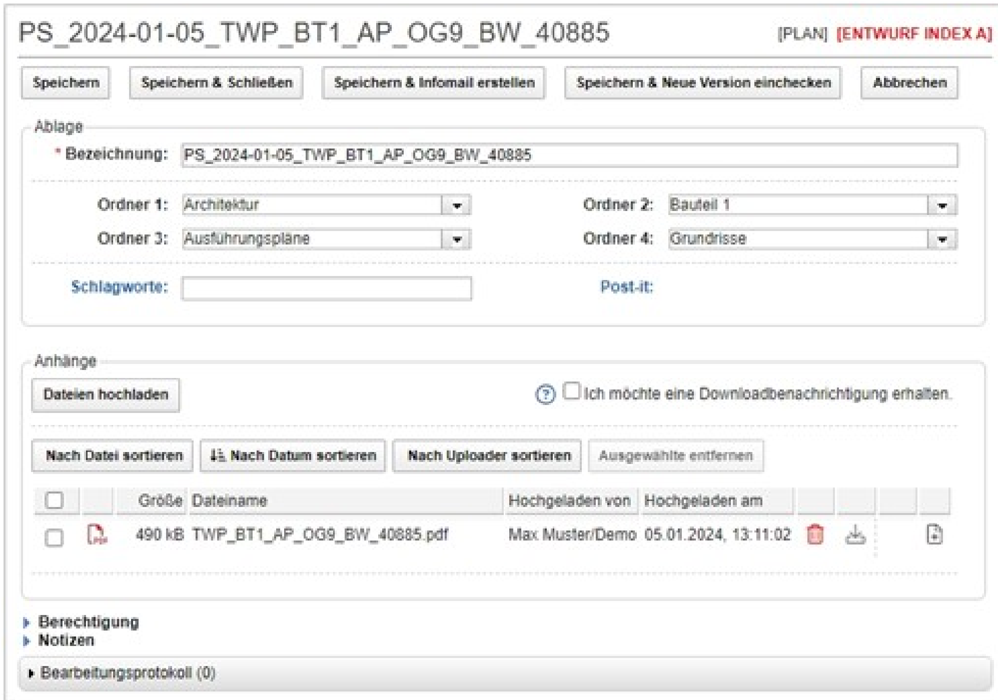
Versioning Documents and Plans

Depending on the configuration, document and plan types can be equipped with versioning. A distinction is made between editable and forced versioning.
With editable versioning, the user can decide whether to change the existing document or create a new version. With forced versioning, the document is no longer editable after saving, so a new version must be created for changes.

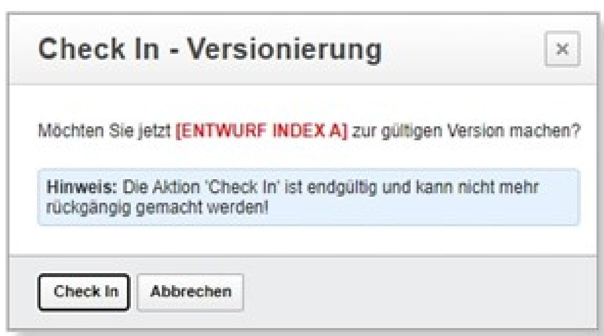
> **VERSIONING DOCUMENTS AND PLANS**
>
> To create a new version of a document:
>
> 1. Open an existing document of which you want to create a new version.
> 2. Click the "**New Version**" to start versioning the document.
> 3. In the dialog box, confirm "**Check Out Versioning**" the creation of the new version by clicking on the "**Check Out**" button. The system checks out the existing document to protect it from being modified by other users and creates a new version of the document.
> 4. Make the changes you want in the new version of the document. In addition to the name and the storage folder, the file attachments, the keywords and the authorization can also be changed.
> 5. Finish editing the new version by clicking on the "**Save and check in new version**". The new version of the document is saved and replaces the original document in the data pool view. At the same time, the index in the header of the document is updated, which automatically numbers the versions.

The draft for the new version is a copy of the current version and also contains all attachments from the last version. All input fields can be edited, the old attachments can be deleted by clicking on the trash can and selecting the new files via the "**Upload files**" button . Attachments that have not changed can remain in the draft of the new version and do not need to be reuploaded.

The authorization is also transferred to the draft for the new version and only needs to be edited if there have been changes.



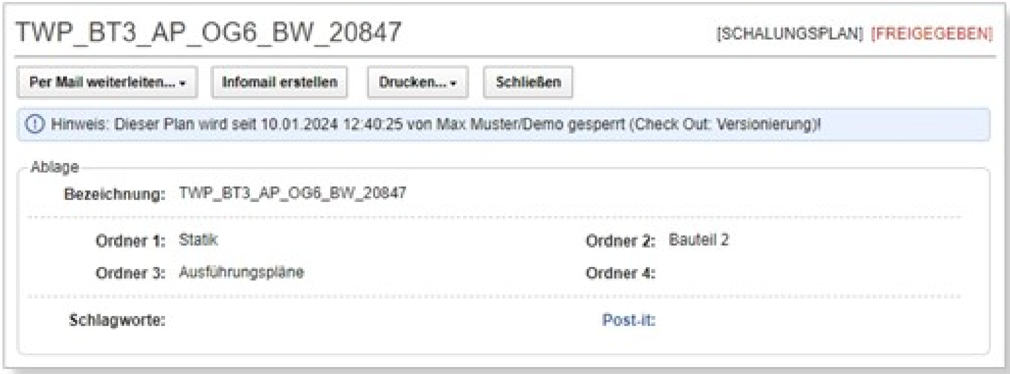
The "**Save and check in new version**" button turns the draft into the new version and is available to all authorized readers. The old version is removed from view and can only be opened by opening the valid version.



When you save and check in the new version, the old plan loses its validity. If the automatic imprint of a QR code is activated, the validity of printed plans can also be checked on the construction site in real time. The QR code can be checked by anyone, regardless of whether you have an account in the data pool or not.

> ⚠ **CAUTION**
>
> The checkin of the new version is final and cannot be undone. As long as the new docu-ment has not been checked in, it is not visible to other users and can be edited and saved as desired. During this

time, the predecessor document is still available to authorized users in read mode, and a status message in the open document indicates that the document has been checked out.



Discard New Version

If the new version of a document is closed again without saving, the currently valid document remains checked out and must be checked in again by the editor by clicking on the "**Check In**" button.

If the draft of the new version of a document has already been saved, it can no longer be deleted. However, it is possible to continue working on the draft at a later date. In order to edit the draft again, the currently valid document must first be opened. The status message in the header of the opened document then indicates the new draft, which can be opened via the link.

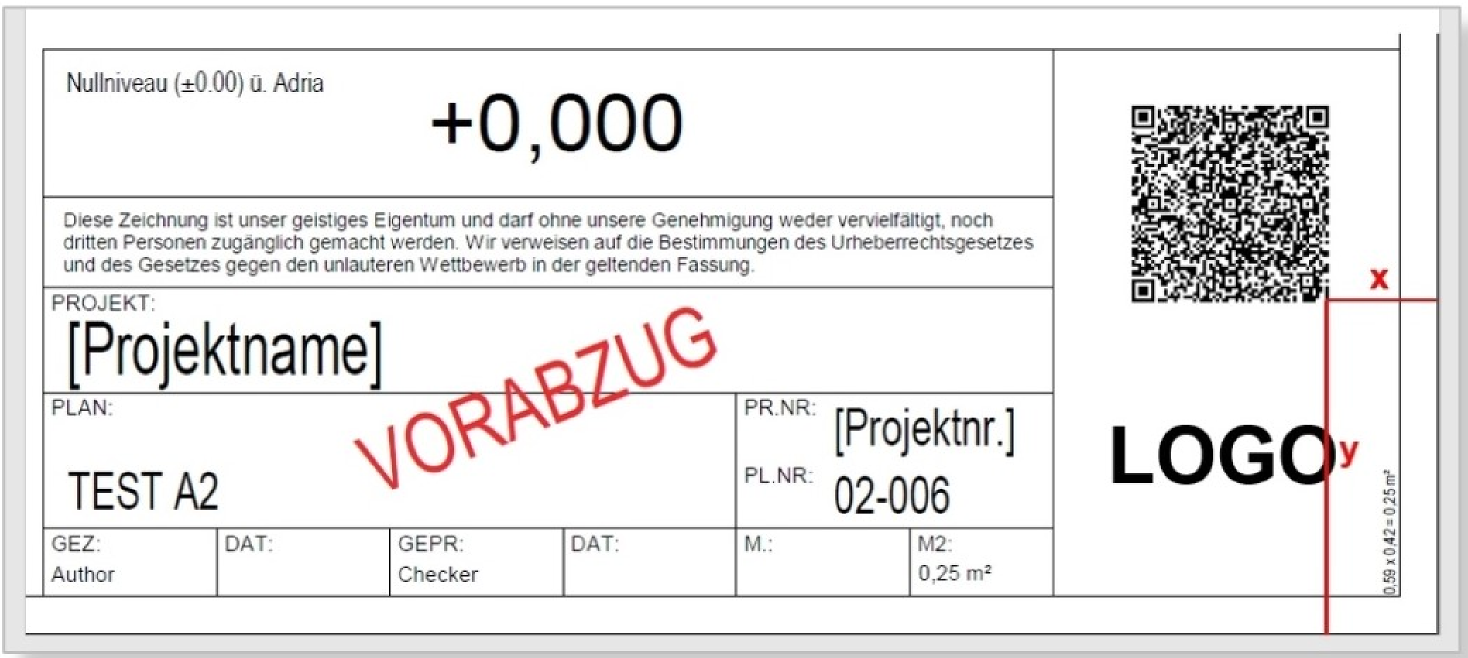
TIP

If you open a document or plan with a note that it has been checked out, you can expect a new version shortly.
If a document remains checked out for a longer period of time, it can be assumed that the person editing it made an error (for example, if the draft is closed again without saving).
In this case, it is necessary to contact the processor and point out the checked-out document.

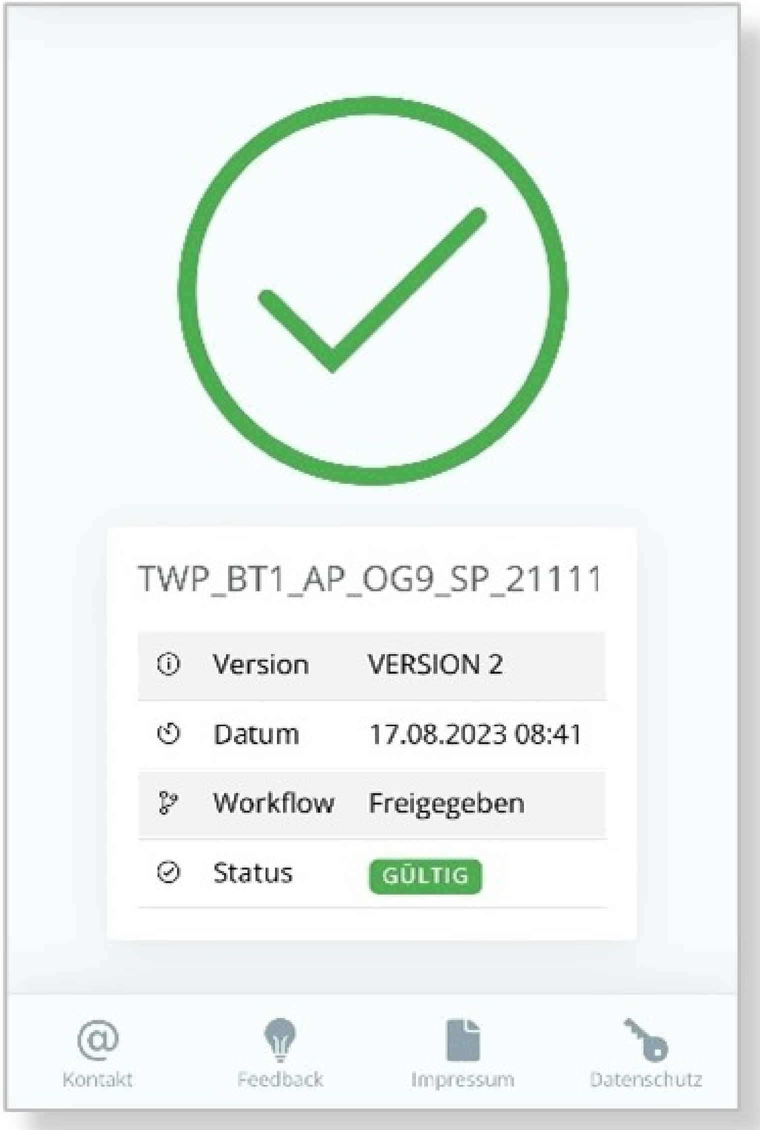
Versioning with QR code

The data pool offers the option of automatically printing a QR code when uploading pdf files, which can be used to read out the status of the file. This function is available for both plans and documents and can be configured individually for each document or plan type.

To use this function, the desired position for the impression of the QR code must be defined. The location of the QR code is indicated by the coordinates x and y in millimeters from the bottom right corner of the sheet and defines the bottom right corner of the QR code.



The QR code is printed in a size of 30 x 30 millimeters, existing texts or graphics at the specified position are overprinted.



The information of the QR code can be read by anyone with a smartphone and camera, a separate account in the data pool is not required.

The status is displayed correctly even if not all attachments have been replaced in the course of versioning. The system recognizes the new attachments, and no new QR code is generated for plans that have not changed.

Workflows

An important function for the handling of projects are review and approval workflows for documents and plans. Workflows enable a standardized process for testing and approval and provide a variety of possible configurations and variants in terms of the number and order of inspectors and the permitted inspection time. By defining all the necessary parameters when creating the data pool, the workflows for the creator of a document are very easy to use during the ongoing project.

Basics

With the definition of workflows, the entire review and approval run for documents and plans can be determined, whereby a workflow is always associated with a specific document or plan. As documents and plans are reviewed and approved, read permission may also change. Documents that are under review can only be read by the reviewers and the default readers. With the release, the document or plan becomes visible to all selected readers.
If the document or plan is rejected, the creator receives information from the system. The changes must be incorporated by the creator and the workflow must be restarted.

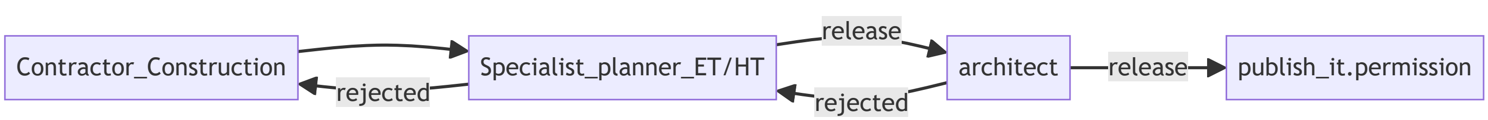
For each inspection step, an audit period can be stored, which is available for the inspection. In the "**Workflow Documents**" or "**Workflow Plans**" view, all open workflows are displayed in the form of a traffic light system, which provides information about the remaining review time.

Basically, a distinction is made between two types of workflows: In the **serial workflow**, the inspection steps are carried out one after the other in a fixed order. Each individual auditor therefore has the specified audit period at his disposal.

In the **parallel workflow**, all reviewers receive a request to review the document or plan at the same time. The order of the examiners is arbitrary, the specified audit period applies to all examiners together.

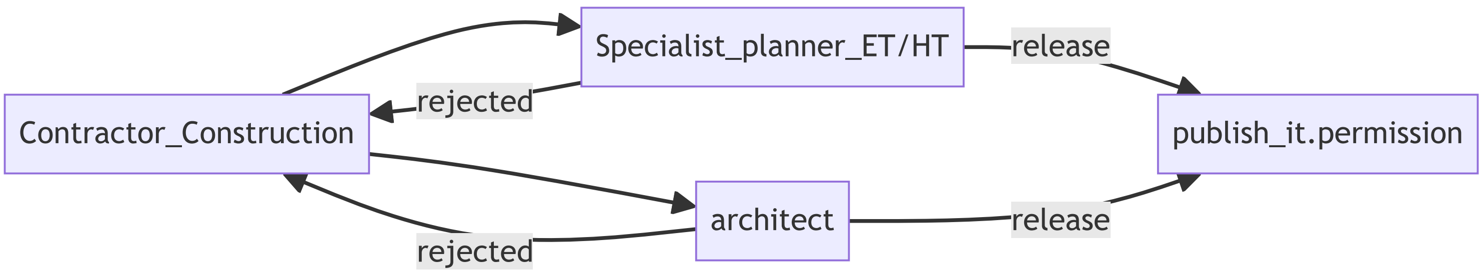
serial Workflow

graph_LR image



parallel workflow

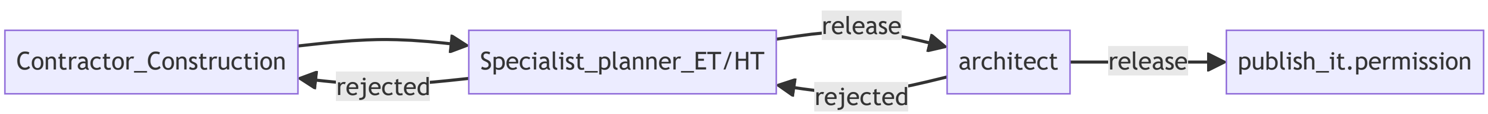
graph_LR image



In addition to the standard release, a conditional release can also be defined for workflows . In the course of the audit, the auditor has the option of prescribing conditions under which the document or plan is approved. The creator of the document or plan must incorporate these conditions and then upload the modified version to the system.

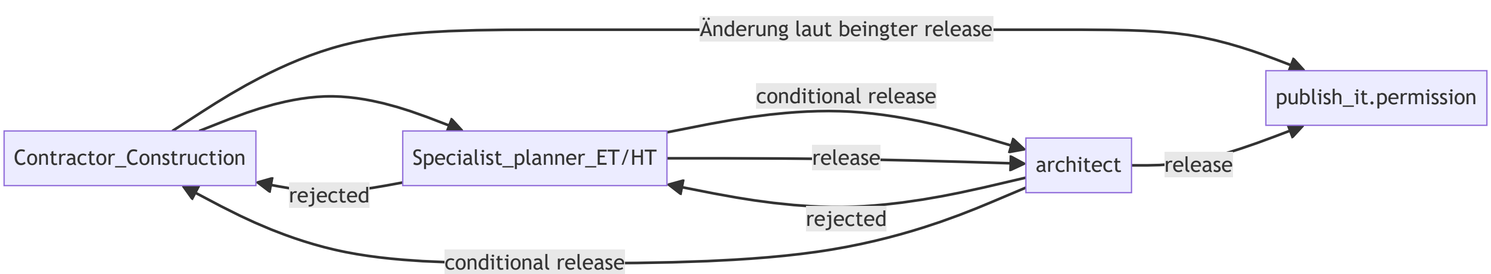
standart release

graph_LR **image**



conditional release

graph_LR **image**



> ⚠ **CAUTION**
>
> Once a plan has been reviewed and approved with conditional approval, the plan must be uploaded after the changes have been incorporated into the system, otherwise it will not be available to the

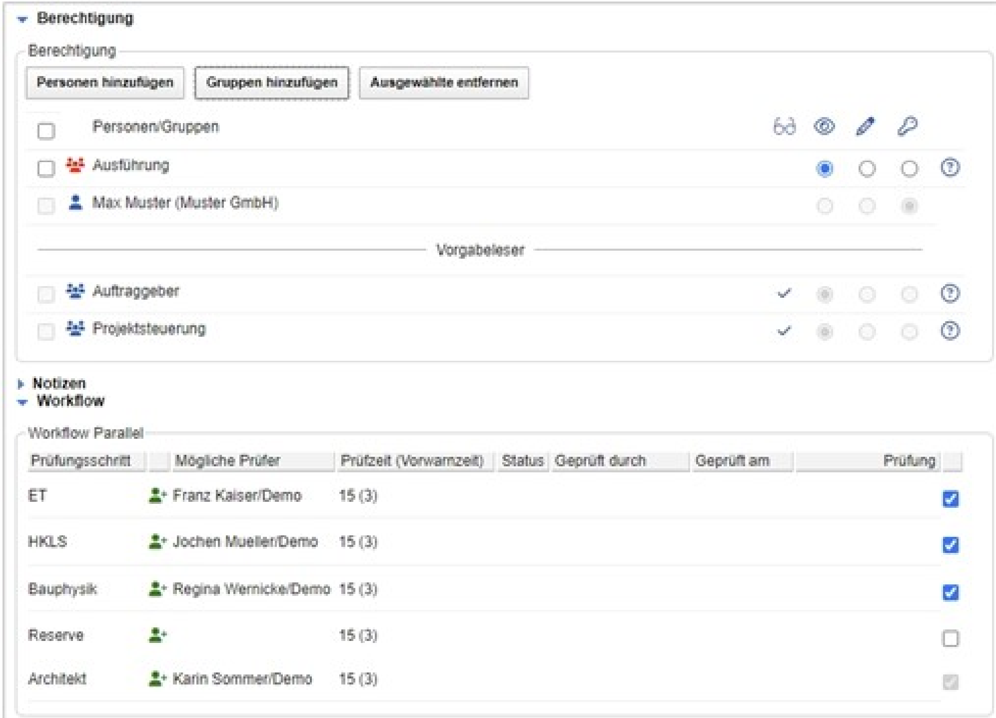
> project team. The updated plan no longer goes through a workflow because it has already been released.

Workflows can be combined with versioning to create an integrated function. To create a new version, the shared document must be opened and versioning must be started via the "**New version**" button. The process corresponds to the steps described in chapter **6. Versioning**, instead of the checkin, the finished document is forwarded for review and thus goes through the defined workflow.

Creating Documents and Plans with Workflow

Depending on the configuration, documents and plans can be equipped with different review and approval workflows. The number of approval levels is predefined in the system and can vary depending on the document type. In addition, the examination steps can be carried out in parallel or in series and can be carried out by a dedicated person or alternatively by several people.

> **CREATE DOCUMENTS AND PLANS WITH WORKFLOW**
>
> To create a document or plan using Workflow:
>
> 1. Create a new document or plan using the "**Create...**", fill the filing folders and upload the required attachments.
> 2. Open the pane "**Eligibility**" and select the people and groups you want to have access to the document after it's approved. Optionally, you can also select people and groups as "**Authorized Editors**", which should be given editing rights to the document before the workflow starts.
> 3. In the "**Workflow**“ you can check the specified inspection steps. Depending on the configuration, it is also possible to adjust the inspection steps.
> 4. Change individual checkers by opening the selection box or disable individual checkers if necessary. Modification of inspection steps is only possible if this function has been configured for the current workflow.
>   5 Start the workflow by clicking the "**Save & Forward for Review**" when all input in the document is complete. Confirm the security prompt in the dialog box to start the workflow.
>   Once the document has been forwarded for review, the creator is no longer able to make changes to the document. The view shows the current audit status, and when you hover over the audit status, the details of the workflow are displayed in an info box.



ACHTUNG

Documents with workflow that are under review can only be viewed and edited by the reviewers. Only after the documents have been released are they made available to those project participants who are registered under the read permission.
If predefined readers have been defined in a document with workflow, they can also view the document during the check run.

Working with Workflows

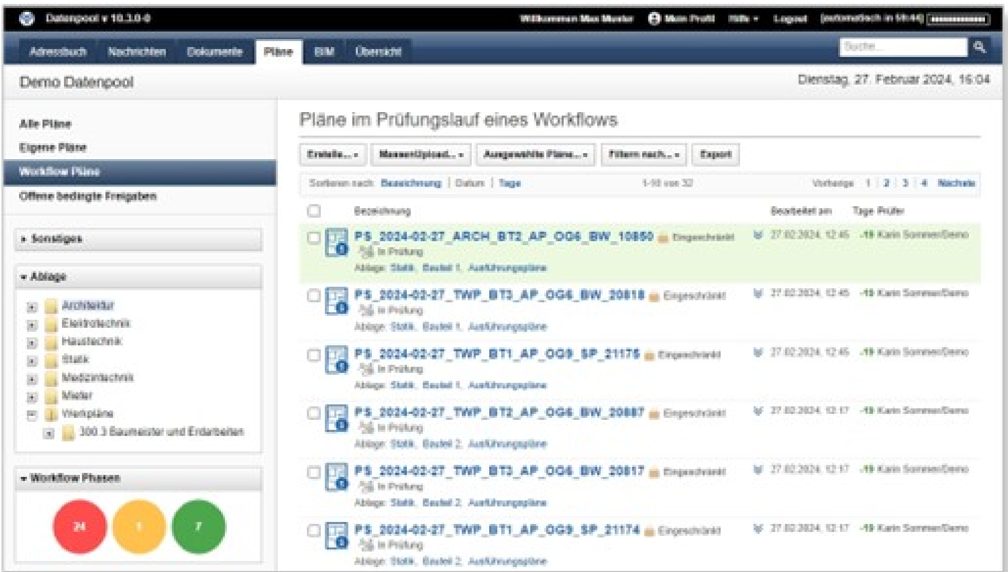
Workflows offer the possibility to specify the review and approval run of documents. In addition to the necessary check steps and the responsible persons, the workflow can also store the period within which the check or approval must take place.
If new documents are due for review or approval, the responsible examiner is informed by the system by e-mail. In addition, a separate view is available that provides a detailed overview of all documents that are currently under review.

In the "**Workflow Documents**" or "**Workflow Plans**" view, all documents or plans that are currently under review or pending configuration are displayed. Based on the stored periods, the system calculates how many days are still available for the review or approval of the individual documents. The remaining days until testing or approval are displayed in the form of a traffic light system and can be selected at the click of a mouse.

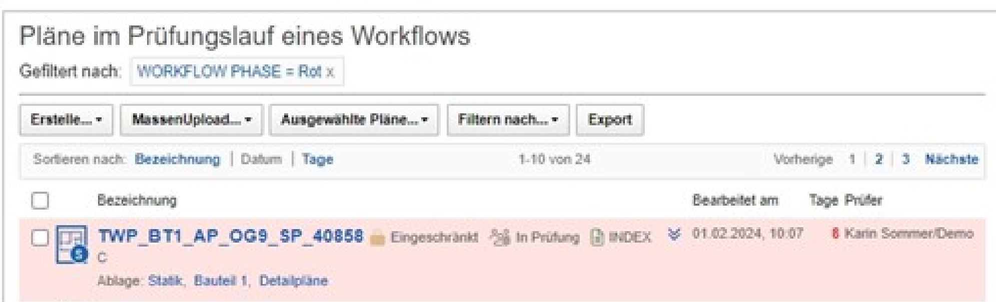
> **VIEW DOCUMENTS WITH OPEN WORKFLOW**
>
> To view documents with an open workflow:
>
> 1. Click on the "**Workflow Dokumente**" to view all documents that are currently under review. To view all sheets that are under review, click the "**Workflow Plans**“.
> 2. Click on the traffic light on the left side of the Navigator to see the workflows you want. By clicking on the red traffic light, all documents whose review period has already expired will be displayed. The yellow traffic light indicates those documents that are already in the prewarning level and a click on the green traffic light returns all documents that are still within the normal review period.
> 3. Open the desired document by clicking on the label to view the details of the workflow or to carry out a check.

In addition to the names of the documents, the view also displays the days of the inspection time in different colors. Negative numbers in green and yellow indicate the time remaining until the end of the inspection period, positive numbers in red indicate the number of days by which the inspection period has already been exceeded.

The right-hand column lists the examiners who have to complete the next exam step. In this way, it can be determined in the shortest possible time which persons may be responsible for a delay in the examination of documents.



> ⚠ **ACHTUNG**
>
> If a workflow phase has been filtered using the traffic light function, this filter must be deleted again before filtering can be done for another phase.
>
> The filter can be deleted by clicking on the cross to the right of the filter.



The Tag Cloud "**Workflow Reviewer**" on the left side of the Navigator can also be used to select individual reviewers to get an overview of the status of the open workflows of this reviewer.

Review and approve documents and plans

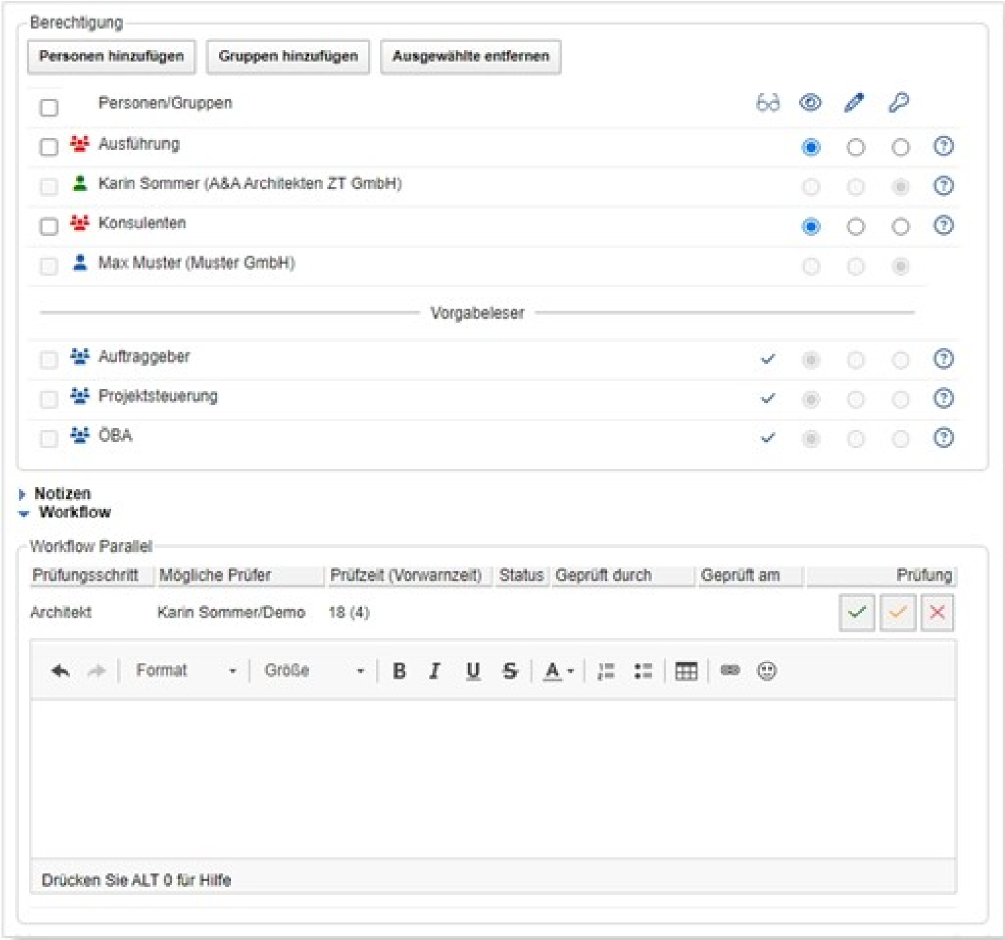
When a new document or plan has been forwarded for review, you will receive a message from the system, and you can open the document or plan directly using the link in this message.

In addition, all documents and plans that are pending review can be found in the "**Workflow Documents**" or "**Workflow Plans**" view. New unopened containers can also be recognized by the red banner on the container icon and are always listed at the top of the view.

> **REVIEW AND APPROVE DOCUMENTS AND PLANS**
>
> To review a document or plan using workflow:
>
> 1. You will be informed by e-mail about new documents that are due for review. Open the document or plan and click the Editto switch to edit mode.
> 2. Check the file attachments that you have received with the document for review.
> 3. As a reviewer, you have full access to the document and can therefore edit the name of the document, the filing folders, the keywording, and the authorized persons. It is also possible to edit the file forwarded for review, and further attachments such as sketches or technical data sheets can also be uploaded.
> 4. In the "**Workflow**" In edit mode, a text field is available in which texts relevant to the check can be entered. Exam-relevant files can be added to the existing Attachments.
> 5. There are 2 or three options available for testing, depending on the configuration. A click on the button with the green hook sets the status of the container to "**Released**". If necessary, an organizational note can be entered in the text area.
>   Clicking on the button with the yellow tick sets the status of the container to "**Conditionally Released**". The required changes can be described in the text area or a reference to an uploaded attachment with the details can be made. The container has been released with the specified changes.
>   Clicking on the button with the red cross sets the status of the container to "**Rejected**". The required changes can be described in the text area or a reference to an uploaded attachment with the details can be made. The contents of the container have been rejected, the data must be revised and reuploaded for a new check. With this option, the workflow is canceled, the other reviewers and the creator of the document are informed about the status by e-mail.

6. Close the processing of the container by clicking on the "**Save & Complete Verification Step**". The selected inspection option is processed by the system and the next inspectors are informed by e-mail.

The Permission section shows the current access for people and groups in color. People and groups with blue icons have read access, while red icons do not have access in the current workflow step. Workflow reviewers are marked with green icons and have full access rights while editing their review step, which allows the entire document to be edited. This allows workflow reviewers to make changes to the authorization in the course of the check, in addition to the designation and filing, if, for example, important readers are missing.



In the text field of the inspection section, information related to the inspection can be en-tered. Associated attachments must be uploaded directly to the "**Attachments**" area and are structured there according to the creator. All recorded information and attachments are documented in the workflow container and can be retrieved later at any time. All subsequent reviewers can also access the added information and attachments in read mode.

> **CAUTION**
>
> If a plan has been released by means of standard approval, any notes or conditions in the text field are **invalid**! The creator of the plan is not informed of the conditions recorded and the plan is immediately visible to all registered readers after approval and can no longer be edited by the creator.

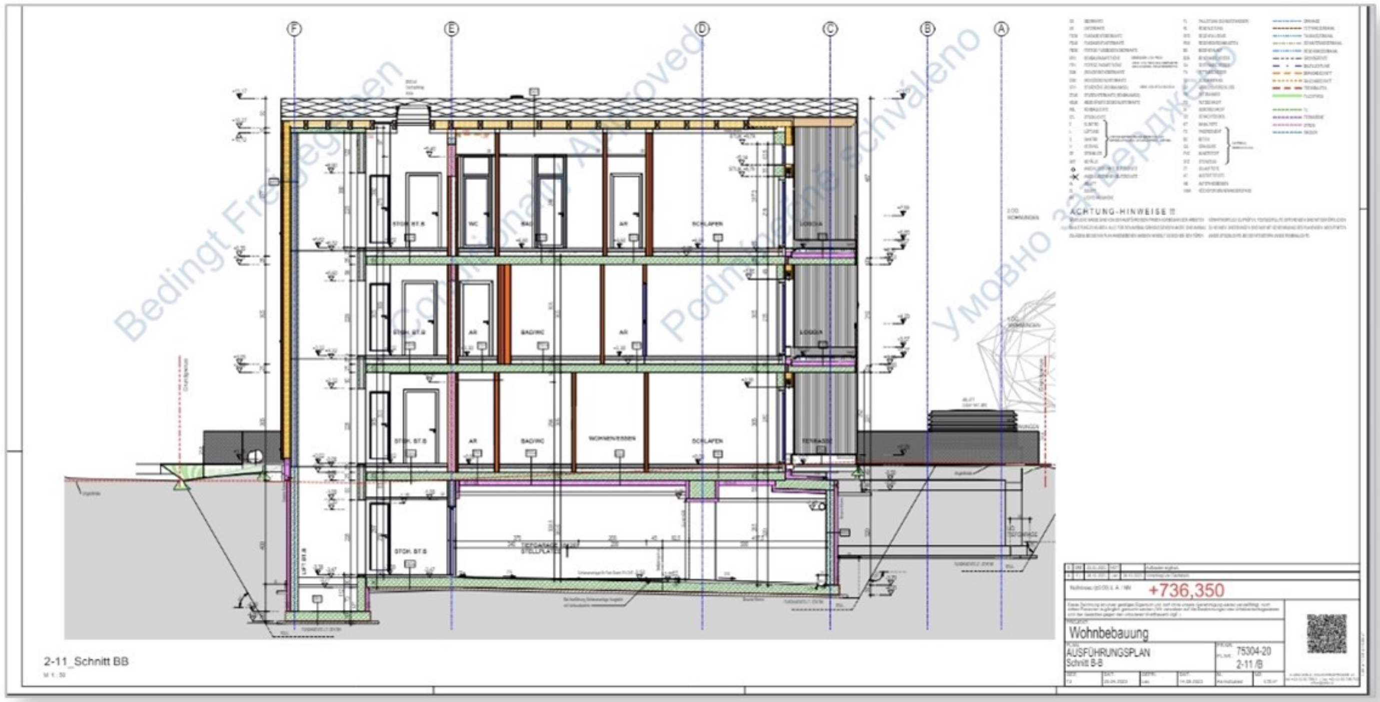
Conditional Release Workflows

Conditional approval of drawings gives the reviewer the ability to link the approval to a change in the plan that needs to be incorporated by the creator. This condition can be created in the form of a text, a sketch, as an annotation in the plan or with any attachment and recorded directly in the test step. In addition to faster processing, this form of approval has the main advantage that the specialist planner does not have to check the incorporated changes again.

The workflow in the data pool is prepared for conditional release and alternately provides two different types of plans for the release process: If a new version is created from the existing plan after a conditional release, this new plan will not contain a workflow in the next version - the plan has already been released. The new version of the plan with the incorporated changes only needs to be uploaded by the creator and is immediately available to the selected readers as a shared plan after saving.
Only when a new version of the plan has to be created again is a workflow available for review and approval.

CAUTION

The read authorization for the selected readers can be preconfigured in the system. The default set in the system is that conditionally released plans can also be read. To avoid using erroneously conditionally released sheets, the system prints a watermark with the note "**Conditionally Released**".



The entire review run of the conditional release workflow is not complete until the revised plans are uploaded by the creator. Saving the new version gives readers access to the revised plan, which now includes all the changes according to Conditional Release.

Workflows with flexible review steps

In order to enable efficient processing of workflows between the specialist planners, workflows can be configured with flexible inspection steps. The individual test steps can be deactivated if they are not necessary. In addition, it is possible to provide reserve inspection steps and modify the proposed auditors.

The adjustment of the check steps in the workflow can be made either by the creator or by a third person who is stored in the workflow configuration. After the workflow has started, no changes to the inspection steps are possible.

Workflow Parallel

Prüfungsschritt	Mögliche Prüfer	Prüfzeit (Vorwarnzeit)	Status	Geprüft durch	Geprüft am	Prüfung
ET	Franz Kaiser/Demo	15 (3)				
HKLS	Jochen Mueller/Demo	15 (3)				
Bauphysik	Regina Wernicke/Demo	15 (3)				
Reserve		15 (3)				
Architekt	Karin Sommer/Demo	15 (3)				

Depending on the configuration, individual inspection steps and the inspector may be fixed, the check box for deactivating the inspection step is then not active and no alternative inspectors can be selected.

Several auditors can also be nominated for each test step, who have to optionally check the plan. The examiner who performs the inspection first has completed the inspection step, the remaining examiners have nothing more to check.

The Workflow section displays the review time available to complete the review step. In addition, an advance warning time is stored in the system, at which the traffic light in the "**Workflow Plans**" view jumps to yellow and signals that the inspection time is about to expire.

TIP

Due to the flexible design of the workflow and the possibility of providing reserve test steps, consultants and executing companies can also be called in as auditors for individual details, even if they were not yet known when the workflow was created. This makes it possible to map complex release structures in the project with just a few workflows.

Workflows with regression

For serial workflows, a special function is available that can be used to delegate a check step back to the previous reviewer. This function is used if it turns out that an error has occurred in the previous inspection step or that the test documents have not been uploaded completely.

Whether a regression is available in the workflow is determined in the configuration. In addition, it can be specified whether the inspection time can also be reset with the regression.
Resetting the inspection time is only possible if the first inspector delegates the inspection step back to the creator because an error has crept in or essential documents are missing. The creator then has the option of making a correction or adding missing documents. With the new start of the test run, the test time begins to run again.

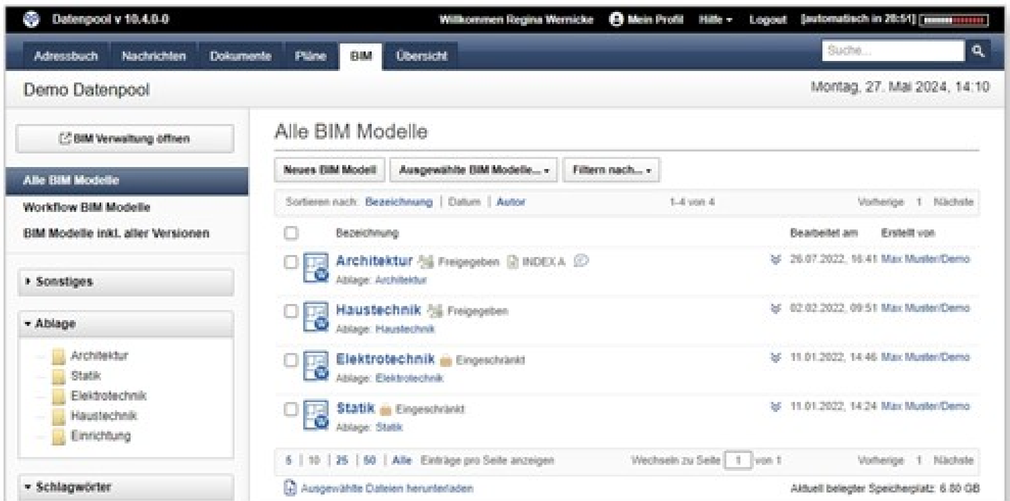
The backstep is activated via the button with the blue arrow in the shape of a circle. The check must then be completed by clicking on the "**Save and complete check step**" button.
When you save, a dialog box appears that shows the possible options for reverting and provides a field for entering a comment.

When the workflow regression is completed, the previous reviewer is informed by the system and receives the stored comment.

After processing or completing the inspection step, it can be completed by the previous examiner and forwarded for testing.

Manage and view BIM models

A separate register is available in the data pool for the management of BIM models. The structure and functionality of this tab is the same as for documents and plans, but there is only a very simplified filing structure: there is a main folder for each BIM model, subfolders are only created in exceptional cases when the number of BIM models is very large.



Create a new BIM model

To upload a new BIM model to the data pool, a new container must be created. The authorization system determines which people from the project team can create a BIM model.

Only one BIM model can be created per filing folder, so a separate folder must be created for each of the required BIM models. The permission to create and access the BIM model is defined together with the filing folder and cannot be changed by the user.
Each container holds up to 2 GB of data, and the maximum size of a single BIM model can be up to 1 GB. In the configuration, it is possible to define which file formats may be uploaded in the container.

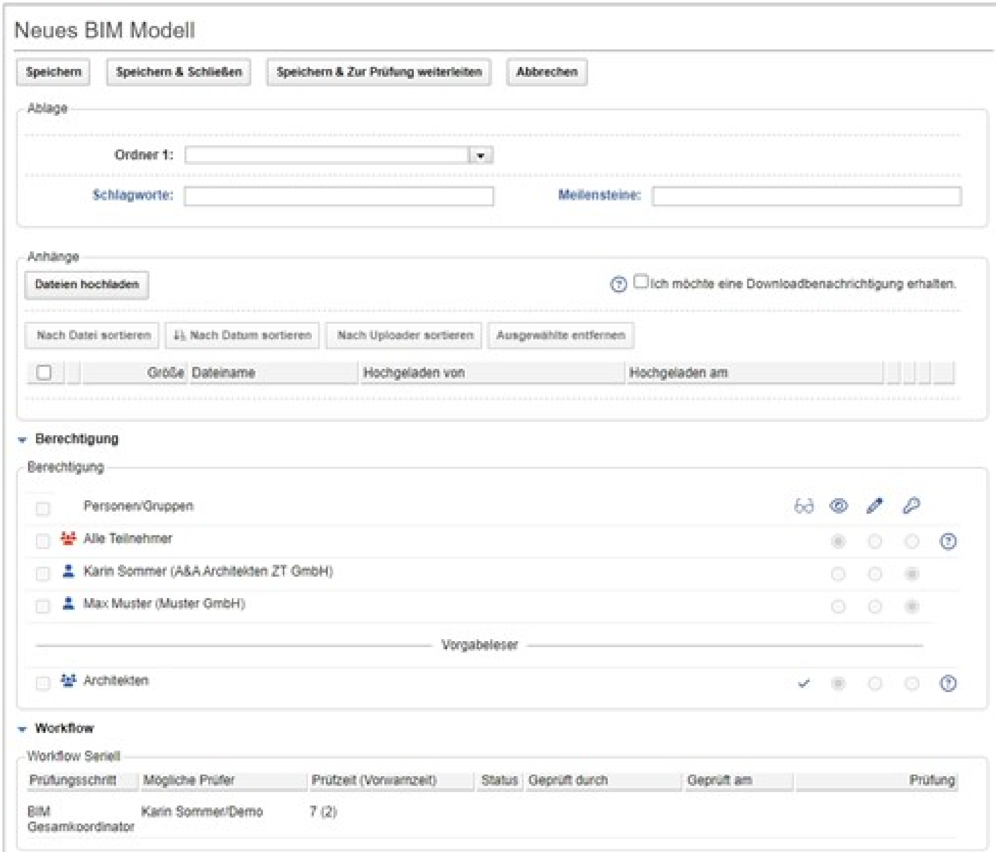
Each container has a workflow for reviewing and approving the BIM model. This review workflow must have at least one review step – this is typically the BIM Manager, which then also decides whether the BIM model is released for display.

CREATE A NEW BIM MODEL

To create a new container to upload BIM models:

1. Click on the button "**New BIM Model**" in the toolbar of the view. The new container opens.
2. Lay out the filing folder for the new BIM model. Note that only one BIM model can be stored in each folder.
3. Enter the relevant keywords and milestones or have the existing keywords displayed by clicking on the link "**Keywords**" and select the desired keywords.
4. Click on the button "**Upload files**" and drag and drop the desired files into the dialog box. Optionally, in the dialog box, you can choose the "**Select**" - in a separate window, the explorer will then open for the selection of the desired files. To select multiple files from Explorer, the "**Ctrl**" key must be pressed.
5. Close the Explorer window using the "**Open**" and start uploading all selected files by clicking on the "**Upload**".
6. Repeat steps 5 and 6 if you want to upload more files.
7. The permissions for persons and groups have been read by the system from the storage folder and are stored in the section "**Eligibility**" displayed. It is not possible to change the specified authorization.
8. The "**Workflow**" section displays the specified inspection steps. The test run for BIM models must include at least one test step.

9. Forward the new BIM model for review by clicking the button "**Save & Forward for Review**". Alternatively, you can enter the entries with "**Save & Close**" if the container has not yet been fully filled.



Reviewing and approving BIM models

When a new BIM model has been forwarded for review, you will receive a message from the system, using the link in this message you can open the container of the BIM model directly.

In addition, all BIM models that are pending review can be found in the "**Workflow BIM Models**" view. New unopened containers can also be recognized by the red banner on the container icon and are always listed at the top of the view.

REVIEWING AND APPROVING BIM MODELS

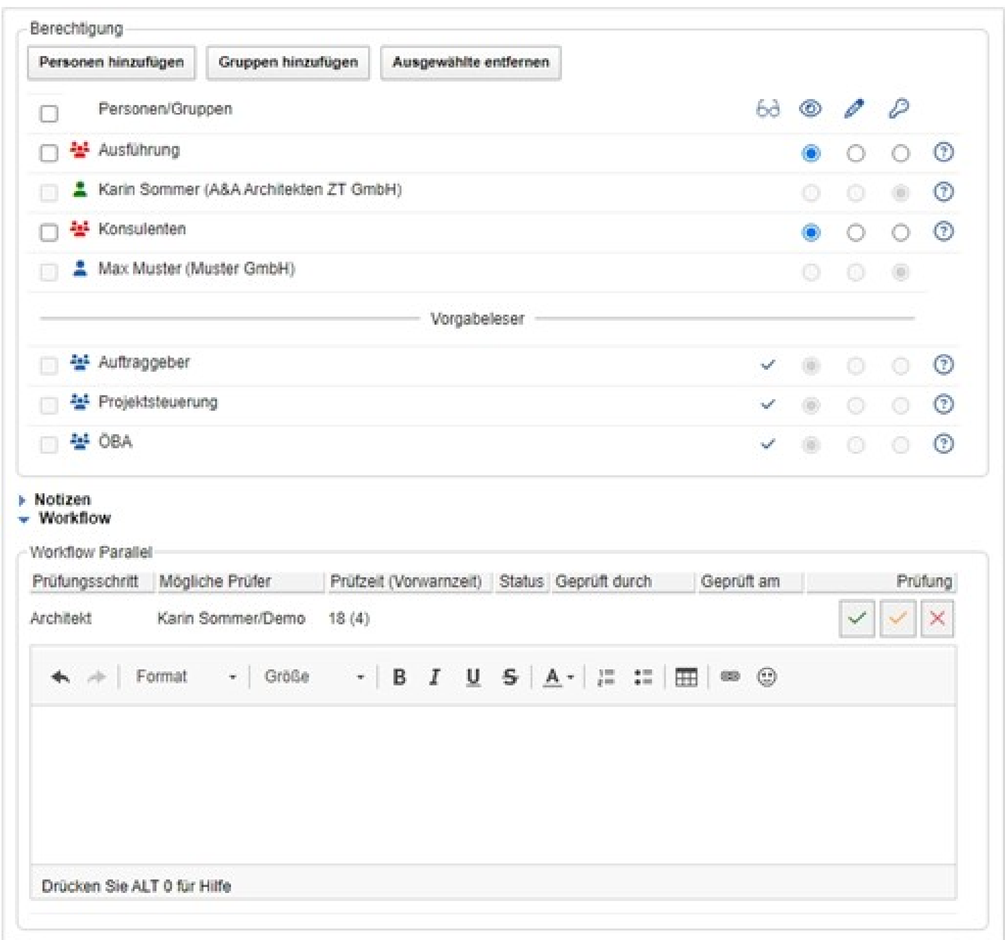
To review a BIM model with workflow:

1. You will be informed by e-mail about new BIM models that are due for review. Open the container and click the Editto switch to edit mode.
2. To check the file attachments, they must be opened by clicking on the file name. Since the BIM models are not rendered until the container is released for display, a local viewer must be available to review the BIM models. In addition to the BIM model, the container can also contain other file attachments that are relevant to the review.
3. As a reviewer, you have full access to the container and can therefore edit the filing folder, the keywording, and the milestones. The name of the BIM model and the authorization are read from the filing folder and therefore cannot be edited. It is also possible to edit the other files forwarded for review, and further attachments such as sketches or technical data sheets can be uploaded in the course of the check.
4. In the "**Workflow**" In edit mode, a text field is available in which texts relevant to the check can be entered. Examrelevant files can be uploaded to the existing attachments in the "**Attachments**" section.
5. There are 2 or three options available for testing, depending on the configuration. A click on the button with the green hook sets the status of the container to "**Released**". If necessary, an organizational note can be entered in the text area.
   Clicking on the button with the yellow tick sets the status of the container to "**Conditionally Released**". The required changes can be described in the text area or a reference to an uploaded attachment with the details can be made. The container has been released with the specified changes.

Clicking on the button with the red cross sets the status of the container to "**Rejected**". The required changes can be described in the text area or a reference to an uploaded attachment with the details can be made. The contents of the container have been rejected, the data must be revised and reuploaded for a new check. With this option, the workflow is canceled, the other reviewers and the creator of the document are informed about the status by e-mail.

6. Close the processing of the container by clicking on the "**Save & Complete Verification Step**". The selected inspection option is processed by the system and the next inspectors are informed by e-mail.

The Permission section shows the current access for people and groups in color. People and groups with blue icons have read access, while red icons do not have access in the current workflow step. Workflow reviewers are marked with green icons and have full access rights while editing their review step, which allows the entire document to be edited.



In the text field of the inspection section, information related to the inspection can be entered. Associated attachments must be uploaded directly to the "**Attachments**" area and are structured there according to the creator. All recorded information and attachments are documented in the workflow container and can be retrieved later at any time. All subsequent reviewers can also access the added information and attachments in read mode.

> **CAUTION**
>
> If a BIM model has been released by means of standard approval, any notes or conditions in the text field are invalid! The creator of the plan is not informed of the conditions recorded and the plan is immediately visible to all registered readers after approval and can no longer be edited by the creator.

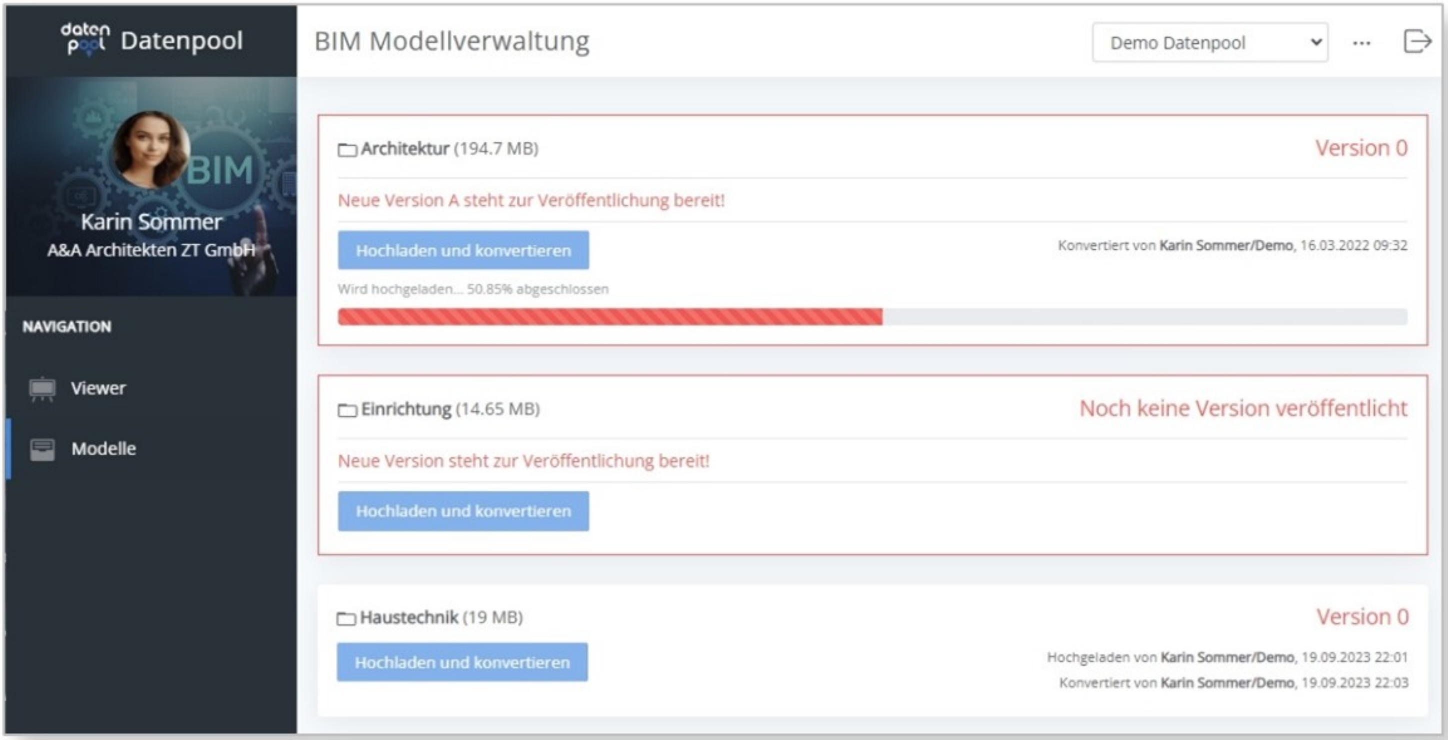
Sharing BIM Models for Display

The data pool provides a viewer that allows all project participants to open the BIM models using only the browser without any additional software. However, the BIM models are not automatically available for viewing, but must be released for display by the BIM coordinator.

SHARE BIM MODELS FOR DISPLAY

To share a BIM model for viewing in the viewer:

1. For the management of BIM models, special rights as a BIM coordinator are required. Open the BIM Model Manager in the dashboard or click on the button in the "**BIM**" tab "**Open BIM Administration**".
2. In the BIM administration, all models that have already been released via the review workflow and can now be converted for display are displayed. Converting the BIM models is necessary because the browser requires a specific file format to display the BIM models. Select the BIM model from the view that you want to make available for display and click on the "**Upload and convert**"
3. The selected BIM model is now converted by the system and rendered for display in the browser. The conversion starts immediately and can take a few minutes depending on the size of the BIM model.
4. After completion of the process, a status message confirms the successful conversion. You can now release another BIM model for viewing or leave BIM Model Management.



TIPP

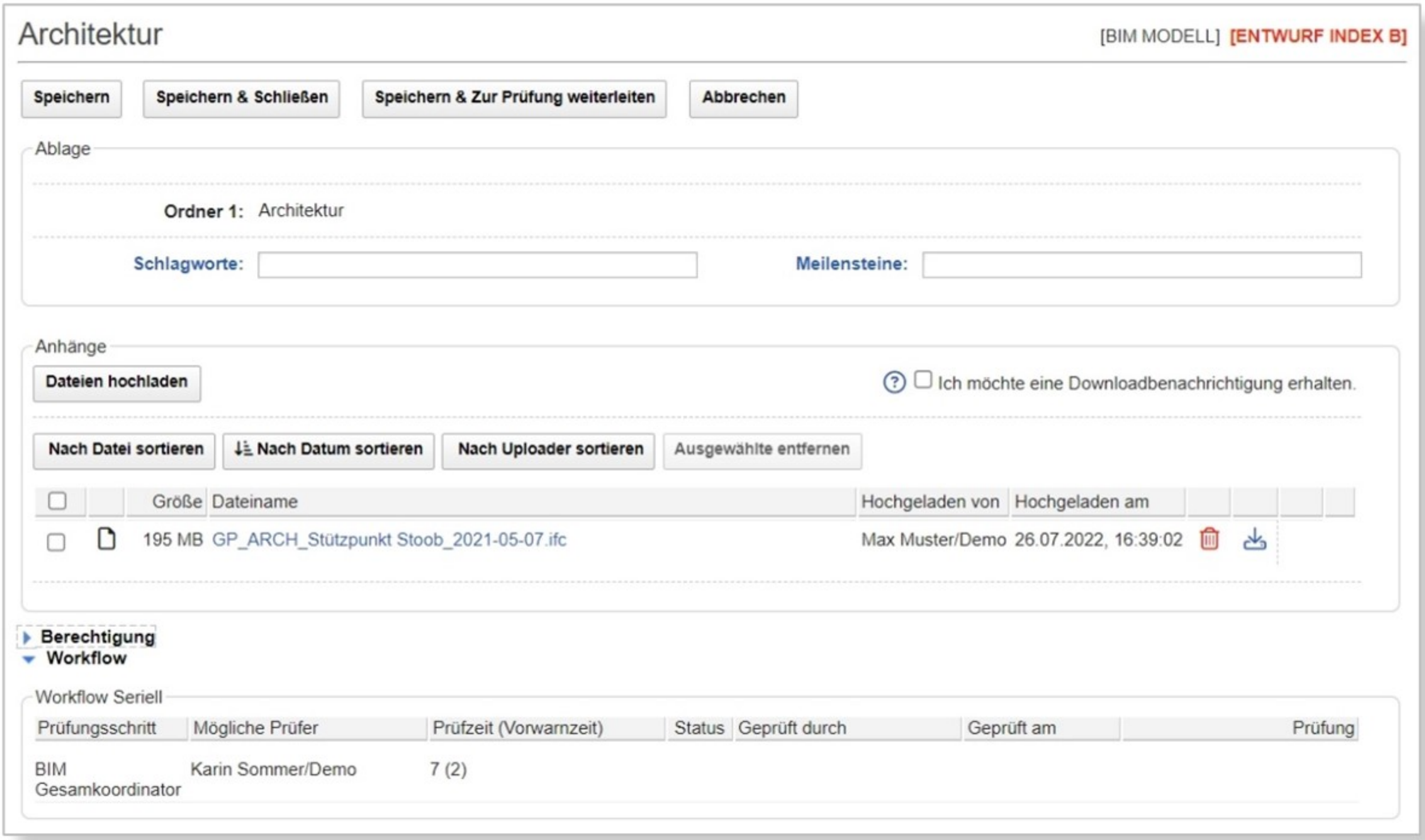
BIM model management gives you the option of making only selected BIM models available for viewing and of keeping working or partial models of specialist planners or executing companies only for review and approval. It is important that the review workflow must consist of at least one review step, and the assigned approvers then have the option of rendering the BIM models for viewing after the workflow is completed.

Versioning BIM Models

In contrast to the creation of a new BIM model, the versioning of a BIM model always takes place from the open container. In addition to the creator of the container, anyone with full access rights can also create a new version.
The old versions of the BIM model remain accessible and can be opened from the current container via the "**Versions**" area.

> **VERSIONING BIM MODELS**
>
> To create a new version of a BIM model:
>
> 1. Open the container of an existing BIM model of which you want to create a new version.
> 2. Click the "**New Version**" to start versioning the document.
> 3. In the dialog box, confirm "**Check Out Versioning**" the creation of the new version by clicking on the "**Check Out**" button. The system checks out the existing document to protect it from being modified by other users and creates a new version of the document.
> 4. Delete the old BIM model in the "**Attachments**" section by clicking on the trash can and upload the new version of the BIM model. Change or add to the tags and milestones in the container as needed.
> 5. Finish editing the new version by clicking on the "**Save and forward for review**". The new version of the document is saved and forwarded to the first reviewer for review.

The draft for the new version is a copy of the current version and also contains all attachments from the last version. All input fields can be edited, the old attachments can be deleted by clicking on the trash can and selecting the new files via the "**Upload files**" button .
Attachments that have not changed can remain in the draft of the new version and do not need to be reuploaded. For BIM models, the authorization is automatically read from the folder and cannot be edited in the container.

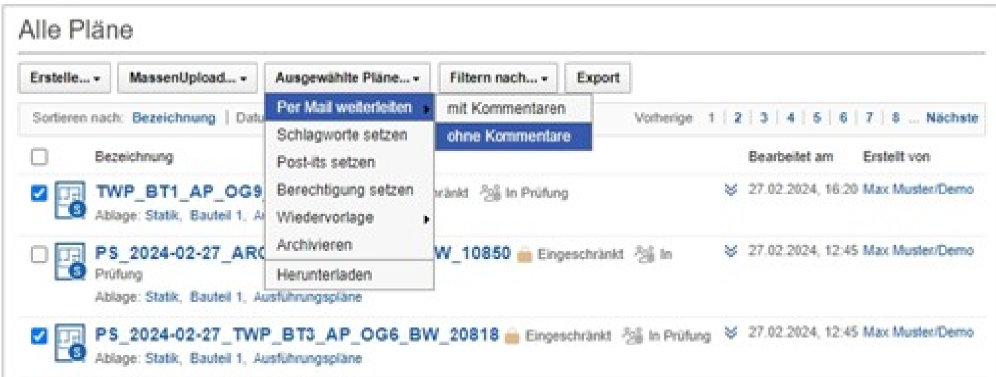


CAUTION

Forwarding the new version for review is final and cannot be undone. As long as the new BIM model has not been forwarded for review, it is not visible to other users and can be edited and saved as desired. During this time, the previous BIM model will continue to be available to authorized users in read mode, and a status message in the open document indicates that a new version is in preparation.

Marked container features

For the processing of several selected containers, the data pool provides its own functions that can be started from the view. Documents can be archived, downloaded or forwarded by e-mail via these functions. In addition, it is possible to change the permission for access.



Forwarding containers by mail

A special function is available for communication with external persons without access to the data pool, which also allows very large files to be sent. Only a link is sent to the external person, which can then be used to download the selected file.

Using the "**Selected Documents – Forward by Mail**" function, the attachments of several containers can be sent to external persons at the same time.

FORWARDING CONTAINERS BY MAIL

To send the attachments of several containers to external persons:

1. Select those documents in the view that are to be sent to an external person by clicking on the checkbox to the left of the label.
2. Click the "**Selected Documents - Forward by Mail**" in the toolbar and select the option "**with or without comments**". A new e-mail is created in the system, which already contains the links of all attachments of the selected documents in the text area. If you do not want to send all links, they can be marked and deleted in the text area.
3. Enter the recipient's address and any additional text in the email.
4. If necessary, add further attachments by clicking on the "**Attach File**".
5. Send the e-mail by clicking on the "**Send**".

When the e-mail is sent, the attachments of the marked containers are copied to a special download area outside the project database, where they are available for download for one month.
After this time, the data will be deleted from the download area and will no longer be available to external persons.

Setting Keywords

With this function, the keywording can be changed or supplemented for all marked documents and plans. The change can only be made for containers that have edit rights and are not in the review run of a workflow. After the review workflow is complete, the feature is available again.

SET TAGS FOR MARKED CONTAINERS

To change the keywording for tagged containers:

1. Select the containers for which you want to change the keywording by clicking on the checkbox to the left of the label. The selection of containers can also be done using a search function.
2. Click the "**Selected documents ...**" and then tap the subitem "**Setting keywords**“.
3. In a dialog box, the desired keywords can now be selected from the list or new keywords can be added. The next step is to determine whether the keywords should be added, replaced or removed.
4. In the dialog box, specify whether to add the selected tags or replace or delete existing tags.
5. Start the changeover of the keywording by clicking on the "**Carry out**“.

In addition to adding new keywords, the "**replace**" option can be used to replace all existing keywords with the selected terms. The "**remove**" option deletes the selected keywords from the selected containers. After the authorization has been changed, the changeover is confirmed in a status message in the header of the view and containers that could not be changed.

CAUTION

The keywording can only be changed for those documents that can be edited by the user. After the keywords have been changed, the changeover is confirmed in a status message.

Setting Post-it Notes

In the data pool, post-it notes are personal keywords that can only be read by the user and are therefore particularly suitable for structuring the project individually. Unlike general tags, which can only be created by the creator of a container, Post-it allows you to assign them to any container.
With the "**Set Post-it**" function, you have the option of creating, changing or adding the personal keywords for all marked containers.

SETTING POST-IT NOTES FOR MARKED CONTAINERS

To change the post-it notes for marked containers:

1. Select the containers for which you want to change the post-it notes by clicking on the checkbox to the left of the label. The selection of containers can also be done using a search function.
2. Click the "**Selected documents ...**" and then tap the sub-item "**Set Post-it**".
3. In a dialog box, the desired keywords can now be selected from the list or new keywords can be added. The next step is to determine whether the keywords should be added, replaced or removed.
4. In the dialog box, specify whether to add the selected tags or replace or delete existing tags.
5. Start the changeover of the keywording by clicking on the "**Carry out**".

In addition to adding new keywords, the "**replace**" option can be used to replace all existing keywords with the selected terms. The "**remove**" option deletes the selected keywords from the selected containers.

Set Permission

With this function, the authorization for all selected documents and plans can be changed or supplemented. The change can only be made for containers that have edit rights and are not in the review run of a workflow. For documents and plans that have been released in the course of a workflow, the authorization can only be supplemented.

SET AUTHORIZATION FOR SELECTED CONTAINERS

To change the permission for tagged containers:

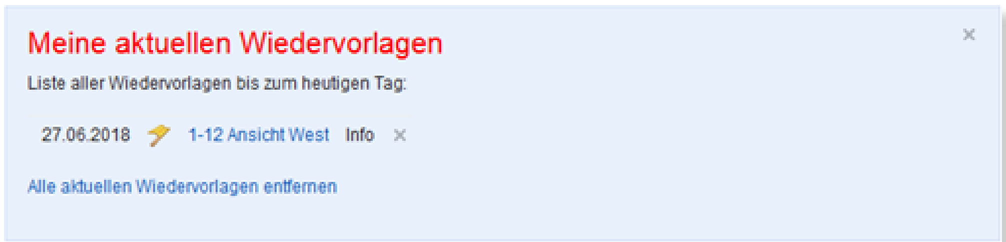
1. Select the containers for which you want to change the permission by clicking the checkbox to the left of the label. The selection of containers can also be done using a search function.
2. Click the "**Selected documents ...**" and then tap the sub-item "**Set permission**“.
3. A dialog box displays all available people and groups. At the click of a mouse, the persons and groups that are to be authorized to access the selected documents can now be marked.
4. In the dialog box, specify what type of permission to grant. In addition to read and edit rights, full access rights can also be assigned, which correspond to the rights of the creator.
5. In the dialog box, specify whether to replace the existing permission or add the selected people and groups.
6. In the next step, specify whether an infomail should be sent to the selected persons after changing the authorization.
7. Start the conversion of the authorization by clicking on the "**Carry out**“.

After the authorization has been changed, the changeover is confirmed in a status message in the header of the view and containers that could not be changed.

> **CAUTION**
>
> The authorization can only be changed for those containers that are allowed to be edited by the user. Documents and plans that are in a review workflow cannot be edited.

Resubmission of containers

With the "**Follow-up**" function, documents and plans can be placed on resubmission on a specific date. The period for the resubmission can be chosen freely. On the resubmission date, the document is displayed in a list when the data pool is started. Optionally, a reminder by e-mail can also be activated.



Documents with a follow-up appear in the list until they are removed from the list as completed and the follow-up is deleted. In the "**Other - Follow-ups**" view, all documents that have currently been placed on resubmission are displayed.

RESUBMISSION OF CONTAINERS

This is how you can put documents and plans for resubmission:

1. Select the containers for which you want to set a follow-up by clicking on the checkbox to the left of the label.
2. Click the "**Selected documents ...**" and then tap the subitem "**Resubmission - Set**“.
3. In the dialog box, enter the date you want to resubmit and, optionally, text in the Remark field. For an additional notification by infomail, the option must be activated in the checkbox.
4. Close the input using the "**Perform**" Off.


Wiedervorlage setzen...
Datum der Wiedervorlage:
Priorität:
Hoch
Normal
Niedrig
Bemerkung:
Möchten Sie zusätzlich eine Benachrichtigung per Infomail?
InfoMail
Durchführen
Abbrechen

Archiving Containers

The data pool provides an archive for documents and plans into which containers that are no longer relevant can be moved. Archived documents and plans are no longer available in the main views and therefore cannot be opened in error.

ARCHIVING CONTAINERS

To archive selected containers:

1. Select the containers in the view you want to archive by clicking the checkbox to the left of the label. The selection of containers can also be done using a search function.
2. Click the "**Selected documents ...**" and then tap the sub-item "**Archive**“.
3. In the security prompt, confirm the archiving of the selected containers. Archiving is carried out.

Archiving can only be carried out for those containers that are also allowed to be edited by the user. Containers that are in the test run of a workflow cannot be archived. Documents and plans are stored in the archive in the same folder structure as in the main views. After the archiving has been completed, the action is confirmed in a status message.

Archived containers can be retrieved from the archive at any time. To restore documents and plans from the archive, you need to switch to the "**Other - Archived Documents**" view . Select all containers in the view that are to be restored and start the "**Restore Selected Documents**" function.

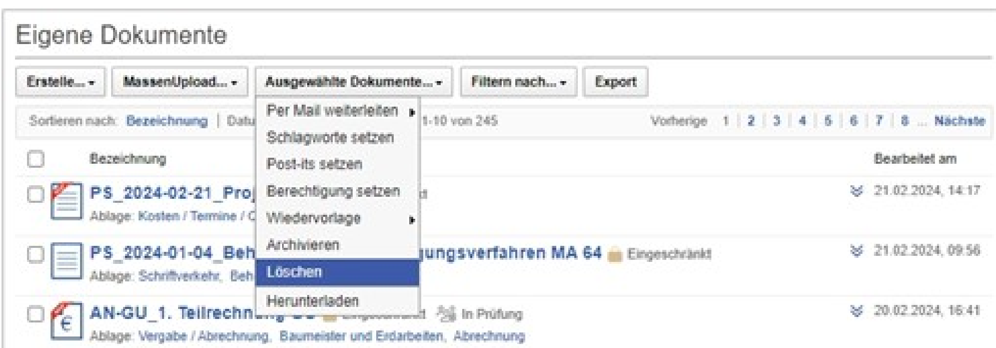
Deleting containers

The Datanpool is document-proof, so once information has been stored, it cannot be deleted. Deleting containers is therefore only possible in exceptional cases if this function has been explicitly approved by the project management.
If the deletion of containers is not allowed, documents and plans that are no longer relevant or created in error can be moved to the archive.

DELETING CONTAINERS

To delete individual containers from the data pool:

1. Click on the view "**My Documents**".
2. Select all containers that are to be deleted by clicking on the checkbox to the left of the label.
3. Click on the button "**Selected documents**" and select the sub-item "**Delete**". The selected containers are deleted after the security prompt is confirmed.



CAUTION

If container deletion has been enabled, the feature is only available in the **My Documents** view and cannot be undone. The delete command is executed after the security prompt has been confirmed. Documents with workflow that are currently under review cannot be deleted.

Download Container

In addition to downloading individual attachments, the data pool also provides a function for downloading several documents. With this function, all attachments of the marked documents are combined into a zip file and downloaded together.
To prevent the zipped files from becoming too large, a maximum of 25 documents can be processed at the same time.

> **DOWNLOAD SELECTED CONTAINERS**
>
> To download up to 25 containers together:
>
> 1. Select the desired containers by clicking on the checkbox to the left of the label. The selection of containers can also be done using a search function.
> 2. Click the "**Selected documents ...**" and the sub-item "**Download**".
> 3. In the dialog box, click the checkbox to specify whether the attachments with File folder or without storage folder.
> 4. In the dialog box, change the name of the zip file if necessary and confirm the note with "**OK**".
> 5. All attachments of the selected containers are combined by the server in a zip file and the download is started.
> 6. Open the zip file to view the downloaded files.

The download of selected documents and plans is limited to 25 containers to prevent the system from being overloaded by oversized zip files.

If the option "**Download with storage folders**" was selected during downloading, the storage folders of the selected documents will be saved in the zip file. When you unzip the zip file on your computer, the attachments are stored in the same folder structure as they were stored in the data pool.

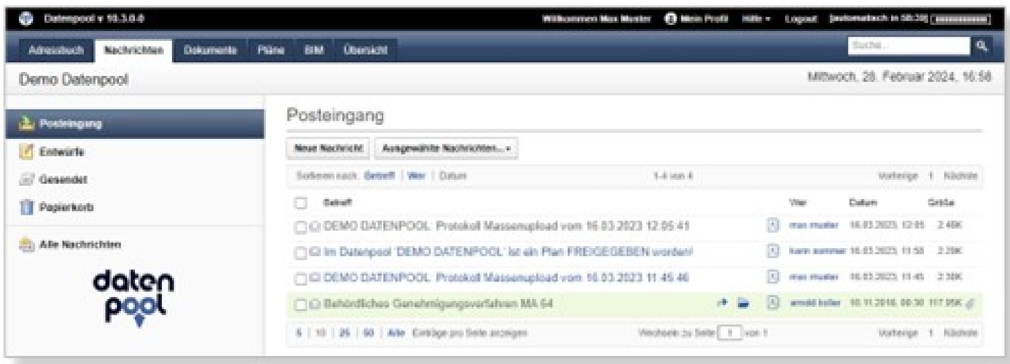
TIP

In the footer of the view, the number of displayed containers can be set. If you want to download a larger number of documents or plans, select the "**Show 25 entries per page**" option. This means that all containers of a page can always be marked and downloaded.

Working with messages

The data pool provides each user with a mailbox with their own e-mail address, which can be used to communicate with external persons. By clicking on the "**Messages**" tab, the personal mailbox is opened.

As an alternative to the personal mailbox, it is also possible to use a group mailbox for several people in a company. The group mailbox can be reached via a project email address, and the people involved can access all emails in the mailbox together, even though they are logged into the system with their personal access data. When sending an e-mail, the name of the user is displayed in addition to the project e-mail address.



The mailbox has several views for managing mails:

- **Inbox**:
  - the view shows all newly received mails
- **Drafts**:
  - the view shows mails that have already been created but not yet sent. This view also stores mails that have been automatically saved by the system.
- **Sent**:
  - this view stores the sent mails.
- **Trash**:
  - the view contains all deleted mails.
- **All messages**:
  - the view shows all the user's mails, including messages that have already been placed in personal folders.

Incoming e-mails can either be moved from the inbox to personal folders or stored in the filing structure of documents and plans in order to make them available to other users.

Moving Messages to Folders

Incoming mails can be moved to personal folders or stored in document management. The folder structure for filing in the personal mailbox is not predefined and can be created individually. The mails can be stored in personal folders directly from the open mail or via the view for all marked mails.

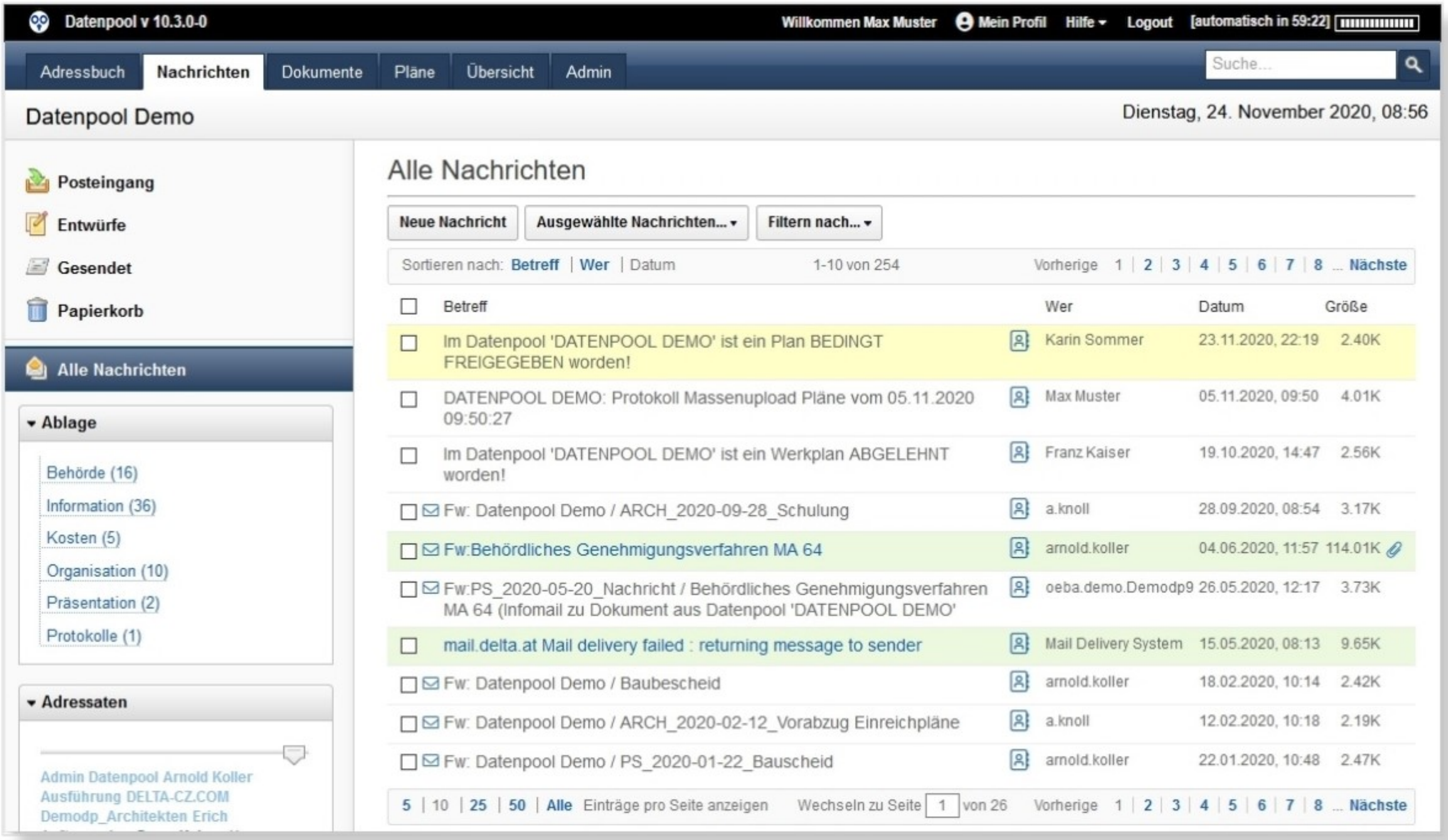
MOVE MESSAGES TO FOLDERS

Here's how to move messages to your personal folder.

1. Open the desired message by clicking on the label or select several messages in the view that should be moved to the same folder.
2. Click on the "**Move to Folder**" in the footer of the opened message or the "**Selected Messages - Move to Folder**" in the header of the view.
3. In the dialog box, select one of the existing main or subfolders, or create a new folder, and choose whether to remove the message from the Inbox after it is filed
4. Close the tray using the "**Postpone**".

There are two folder levels available for storing messages. All folders can be freely defined and added to at any time, which gives you the opportunity to structure the filing as you wish.

By clicking on the "**All messages**" view, the personal folders with the stored messages are displayed. All senders of the stored messages are summarized in the Tag Cloud, and by clicking on an entry, all emails of this addressee are selected and displayed in the view.



Storing messages in the Documents tab

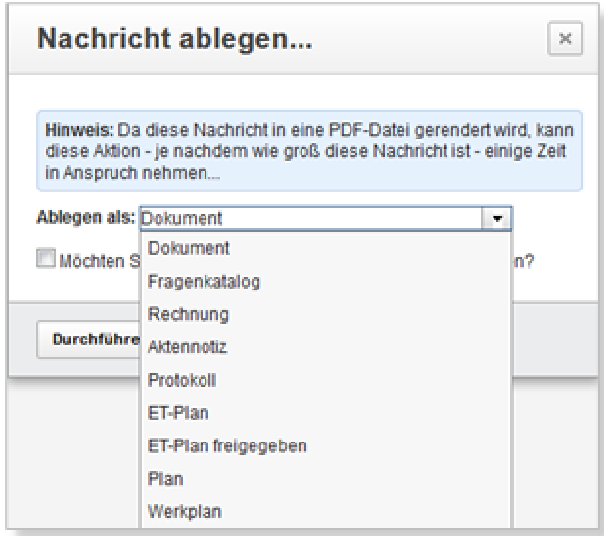
In the course of communication with external persons, it may be necessary to make important messages available to other data pool users.
In this case, incoming messages can be stored in document management or plan management and distributed to other users. In the course of filing, the message is converted into a pdf file so that it can be downloaded later by other users.

Stored messages are stored in the view with a green bar and can be deleted or moved to a folder. Alternatively, the message can also be moved to the trash while it is being filed.

STORING MESSAGES IN THE DOCUMENTS TAB

To store messages in document management:

1. Open the desired message by clicking on the label.
2. Click on the "**Discard**" in the header of the message.
3. In the dialog box, select the desired document type for the filing.
4. Choose whether to remove the message from your Inbox after it's filed.
5. Close the tray using the "**Carry out**".
6. The system converts the message into a pdf document and creates a new container. In the newly created container, select the desired filing folders and enter the keywording.
7. In the "**Right**" determines who is allowed to read or edit the document.
8. Complete the process by saving and distributing the document.



After completion of the filing process, the message is available to the authorized group of persons and can be downloaded like all other documents.
The filing itself as well as each download process are documented in the processing log, which is equivalent to a read receipt.

Storing Emails from Outlook

If the communication in the project is handled via Outlook, it may be necessary to store important e-mails for documentation in the project. The data pool offers the option of storing messages from Outlook in the data pool using drag and drop. In addition to individual messages, a larger number of e-mails can also be stored in one process.

> **STORING EMAILS FROM OUTLOOK**
>
> To store e-mails from Outlook in document management:
>
> 1. Create a new container in the Documents tab using the "**MassenUpload... - Dokument**" and select the desired drive and authorized persons.
> 2. In Outlook, select all emails that you want to put together in the selected folder. By pressing the CTRL key, you can make a multiple selection in Outlook.
> 3. Drag the selected mails from Outlook with the left mouse button pressed into the newly created container in the data pool and drop the mails in the drag & drop field.
> 4. Start uploading using the "**Upload files...**". The mails are uploaded to the data pool and stored in the selected folders, whereby a separate container is created for each mail.
> 5. The dialog box confirms the upload of the messages. From the button "**Send Info-mail**" a message can be sent to the authorized persons. Alternatively, a new upload can be started.

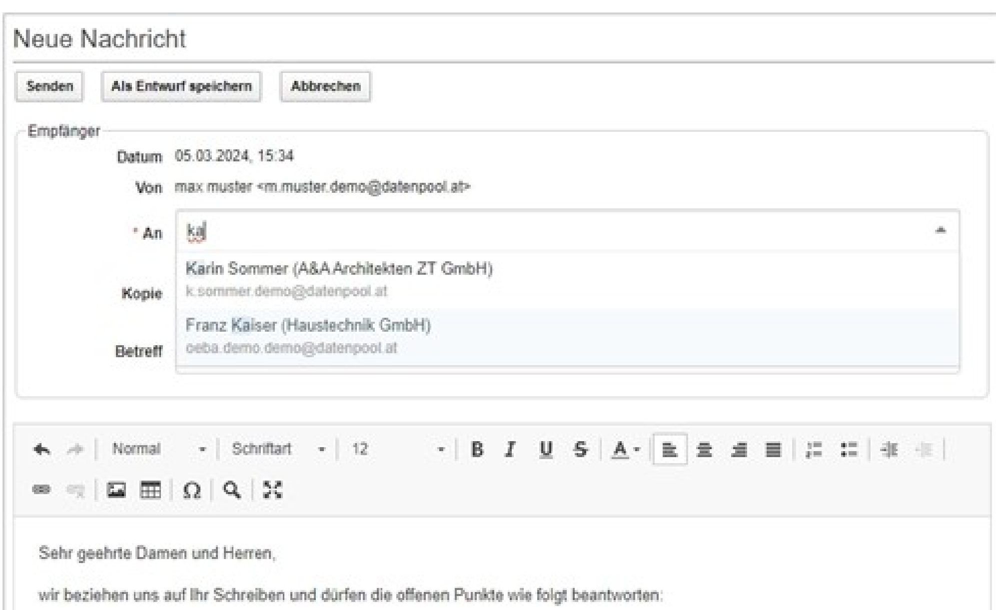
Creating a New Message

Each user has his or her own e-mail address in the data pool. New messages can be created to communicate with external stakeholders. This function is particularly suitable for sending large files, as described in the chapter **8.1 Forwarding containers by e-mail**.

CREATING NEW MESSAGES

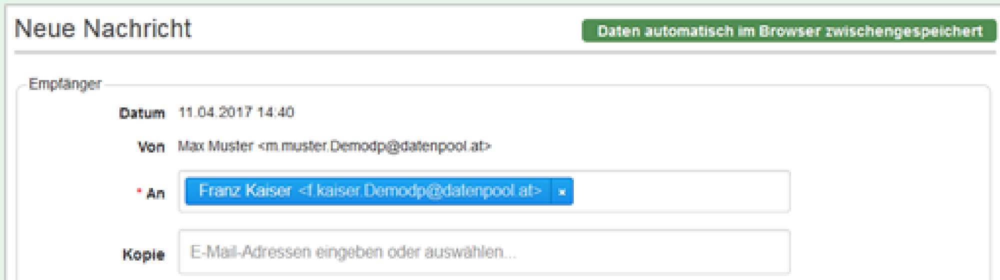
To create a new message:

1. Click on the "**News**" to open the inbox.
2. Click the "**New Message**" in the header of the view.
3. Click in the "**Mail recipients** select an address or enter a new address. The search for recipients can be done by entering any character, the search result is displayed immediately. The selection shows all address data that is available in the address book. In addition to addresses of individual persons, address groups can also be selected, which are displayed at the end of the selection list.
4. Select one or more recipients by clicking or pressing the "**Enter**" key and repeat the process for the "**Copy recipient**".
5. Enter the subject and body of the message.
6. Use the "**Attach File**" Attachments to be sent with the message.
7. Click the "**Send**" to send the message. When the message is sent, it is automatically stored in the "**Sent**".



TIP

New messages are automatically saved by the system every 30 seconds. If the connection to the server has been lost or the new message has been left without saving, simply click on the "**Drafts**" view in the mailbox navigator and open the saved message for further processing.



Message Forwarding

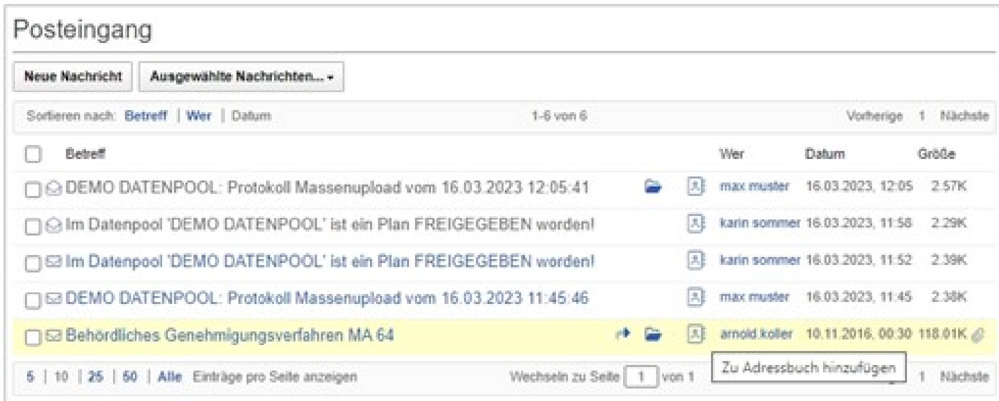
For each user, a message forwarding function is activated in the data pool. Incoming messages are automatically forwarded by the data pool to the specified email address, so you will always receive a message in your mail system when something happens in the data pool.

If the automatic forwarding of messages is not desired, this function can be deactivated via the helpdesk.

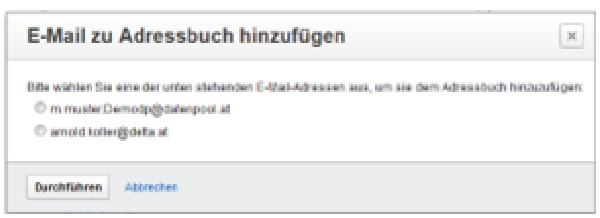
> **TIP**
>
> When you enter text with "**Enter**" to the new line, the system inserts a paragraph and the line spacing is 1.5 lines.
> To get a simple line spacing, you have to switch to the new line with the key combination "**Shift**" and "**Enter**". This does not insert a paragraph, but a simple line spacing.

Adding Address to Address Book

Mail addresses from received or sent messages can be easily added to the address book. To add an address to the address book, click the address book icon in the message inbox. Alternatively, an e-mail address can also be created in the opened message via the "**Add to address book**" button.



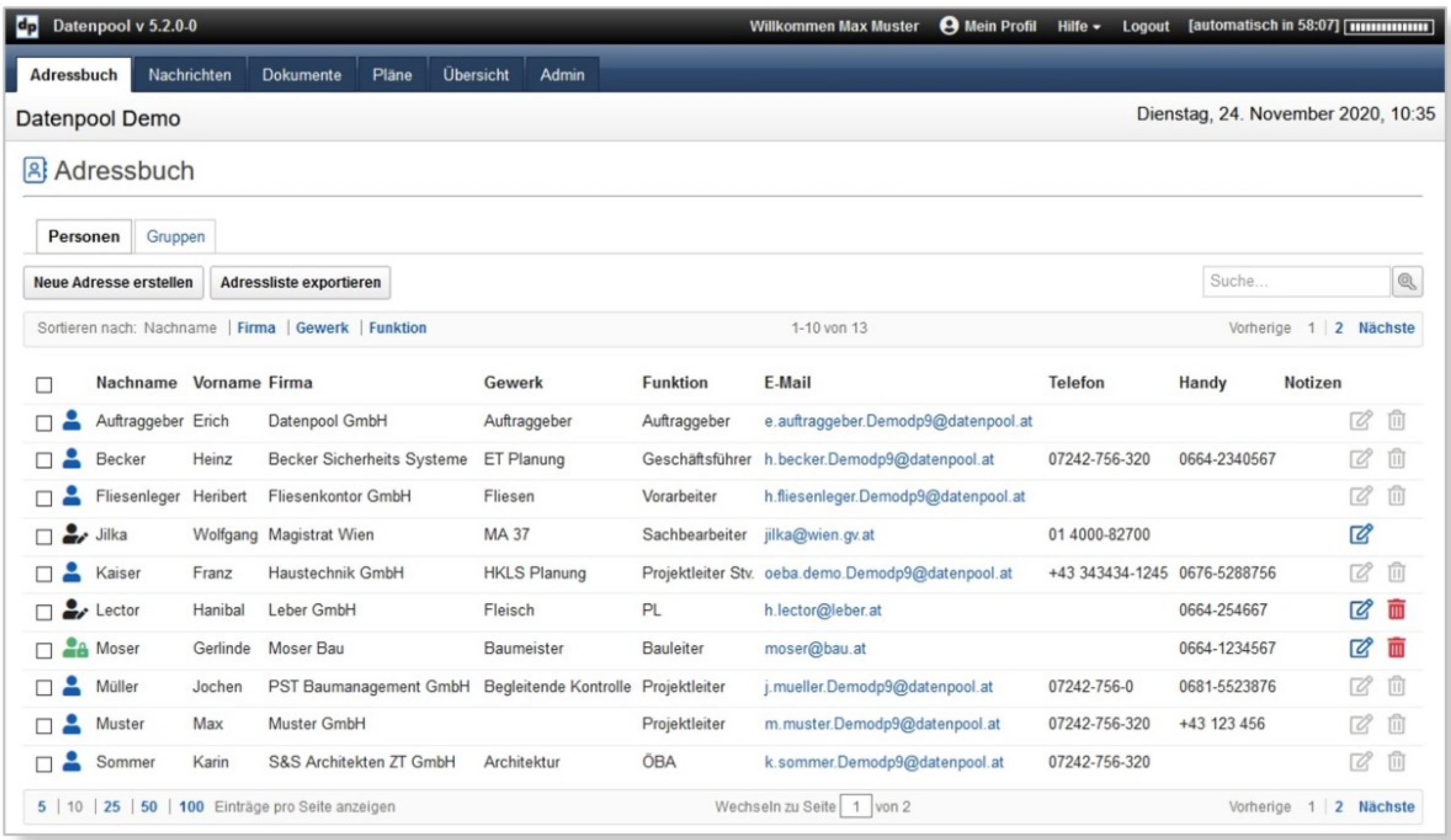
If the message contains several e-mail addresses, a dialog box prompts you to select one of the e-mail addresses for creating the entry in the address book. If you want to transfer several e-mail addresses from the message to the address book, the process must be repeated accordingly.



While saving a new address, the system checks whether an entry with the same e-mail address has already been created in the address book. If the specified email address already exists, the new entry cannot be saved. The corresponding information is displayed in a dialog box.

Adress book

The data pool provides a simple address book that provides an overview of all the people involved in the project and provides the most important contact details. All persons with their own account are automatically listed in the address book, and every user also has the option of adding further addresses to the address book. The right to create new addresses and address groups can be restricted by the project management.



The following functions are available in the address book:

- **Create New Address**:
  - This button can be used to create a new address if you have the necessary rights.
- **Export Address List**:
  - The function offers the possibility to export all addresses as a Microsoft Excel file. After confirming the security prompt, the download of the address list is started.
- **Search**:
  - The search field can be used to search for any name or designation. With a `"*"` as a placeholder, parts of words are also searched. All addresses that contain the searched term are displayed in the

result.

- **Email**:
  - By clicking on an e-mail address, a new e-mail is created and the selected address is entered as the recipient.
- **Edit address entry**:
  - Click on the icon to open the address for editing. You can also edit addresses created by other users.
- **Delete address entry**:
  - Click on the icon to delete the address. You can only delete the addresses that you have created yourself.
- **Data pool participants**:
  - All persons who have an account in the data pool as project participants are marked by a blue symbol on the left edge of the view. The entries of the data pool participants cannot be edited or deleted.
- **Personal Contact**:
  - Address entries that have been marked as personal contact are marked by a green icon on the left edge of the view.
- **Create a new group**:
  - A new address group can be created in the "**Groups**" tab if you have the necessary rights. Newly created address groups can only be used to send e-mails and are not available as authorization groups for documents.

The addresses are sorted by the system according to the family name. Alternatively, by clicking on the designations in the header of the address area, you can sort by **company**,**trade** or **function** in order to find the desired person more quickly.

Add a new address

All people who have an account in the current project are automatically displayed in the address book. In addition, addresses of external persons can be created, which can be selected when creating new emails. The right to create new addresses and address groups can be restricted by the project management.

ADD ADDRESS TO ADDRESS BOOK

To add an address to the address book:

1. Go to the "**Address book**" and click on the "**Create a new address**“
2. In the dialog box, fill in the address information fields. The storage of the address data is only possible if all default fields have been filled. The "**Notes**" field can be optionally filled
3. Select the "**Personal contact**" if you don't want the address to be available to other users.
4. Confirm the entry by clicking on the "**Save**“. The new address is saved and added to the address book.

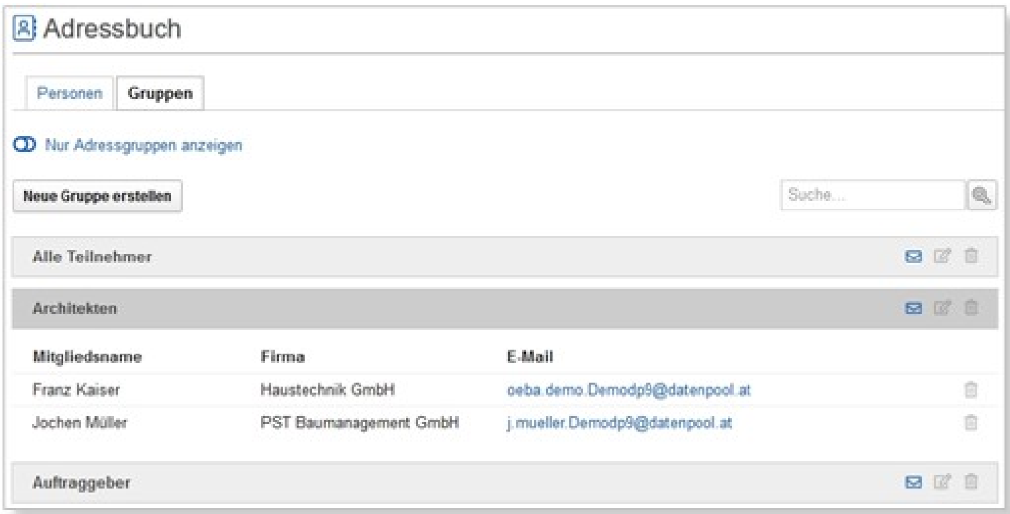
While saving a new address, the system checks whether an entry with the same e-mail address has already been created in the address book. If the specified email address already exists, the new entry cannot be saved.

TIP

New address entries can also be created directly from an incoming or sent email. To create a new address entry, click the Address Book icon in the Inbox. If there are several e-mail addresses in the selected message, the desired e-mail address must be selected in a dialog box.

Adding a New Address Group

The "**Groups**" tab provides an overview of all groups of people available in the current project. A distinction is made between authorization groups and address groups. While address groups can only be used to send e-mails, access to documents is also controlled via authorization groups that can only be created by the administration.

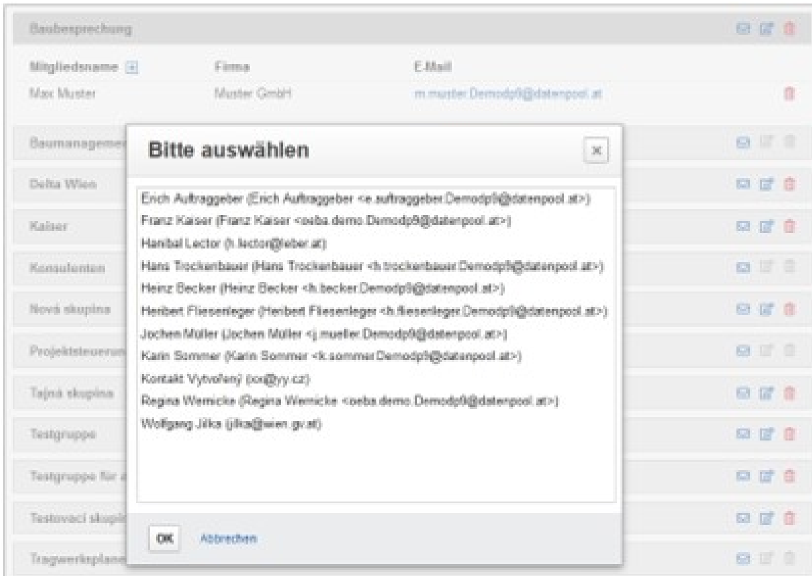


ADD ADDRESS GROUP TO ADDRESS BOOK

To add an address to the address book:

1. Go to the "**Address book**" and click on the "**Groups**" subtab. Using the "**Create a new group**", an address group can be created there for use in e-mail traffic.
2. In the dialog box, enter the group name. A short description of the group can be added in the "**Notes**" field.
3. Confirm the entry by clicking on the "**Save**“. The new group is saved and added to the address book.
4. Open the group and click the plus of the "**Member Name**" column label to add a person to the group.
5. In the list of all project participants, select the people you want to add to the group. By pressing the "**Control key**" several entries can be selected.
6. Complete the selection by clicking on the "**OK**" button, the selected persons will be transferred to the group.

Dialog box for creating a new address group:

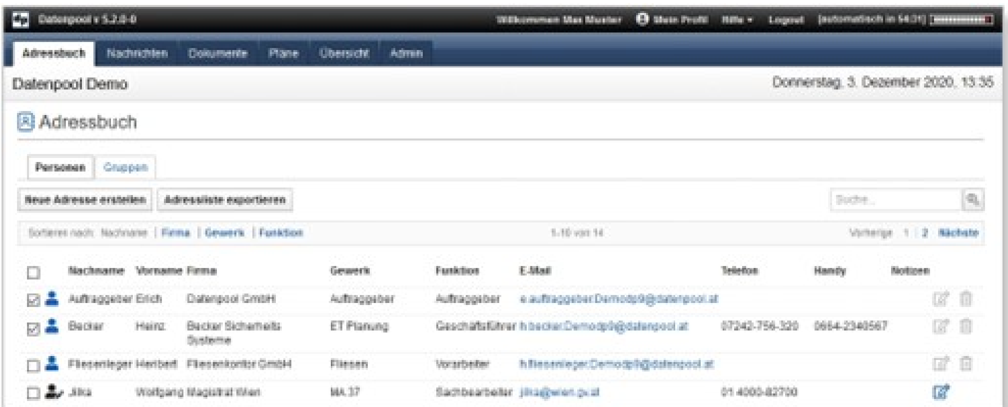


The persons in an address group can be edited or added later. To edit an address group, select the "**Edit Group**" icon in the header of the group, and in the next step you can add or delete people.
If the address group is no longer needed, it can be deleted by selecting the "**Remove group**" icon.

> **TIP**
>
> To write a new message to everyone in a group, you can click on the "**Send message to group**" icon in the header of the group. The system creates a new message in your mailbox and adds the selected group as the recipient.

Export addresses

The addresses from the address book can be exported as an Excel list in order to edit them as a list or send them as an attachment. In addition to a complete list with all addresses, individual address lines can also be marked that are to be exported.



EXPORT ADDRESSES

To export addresses from the address book:

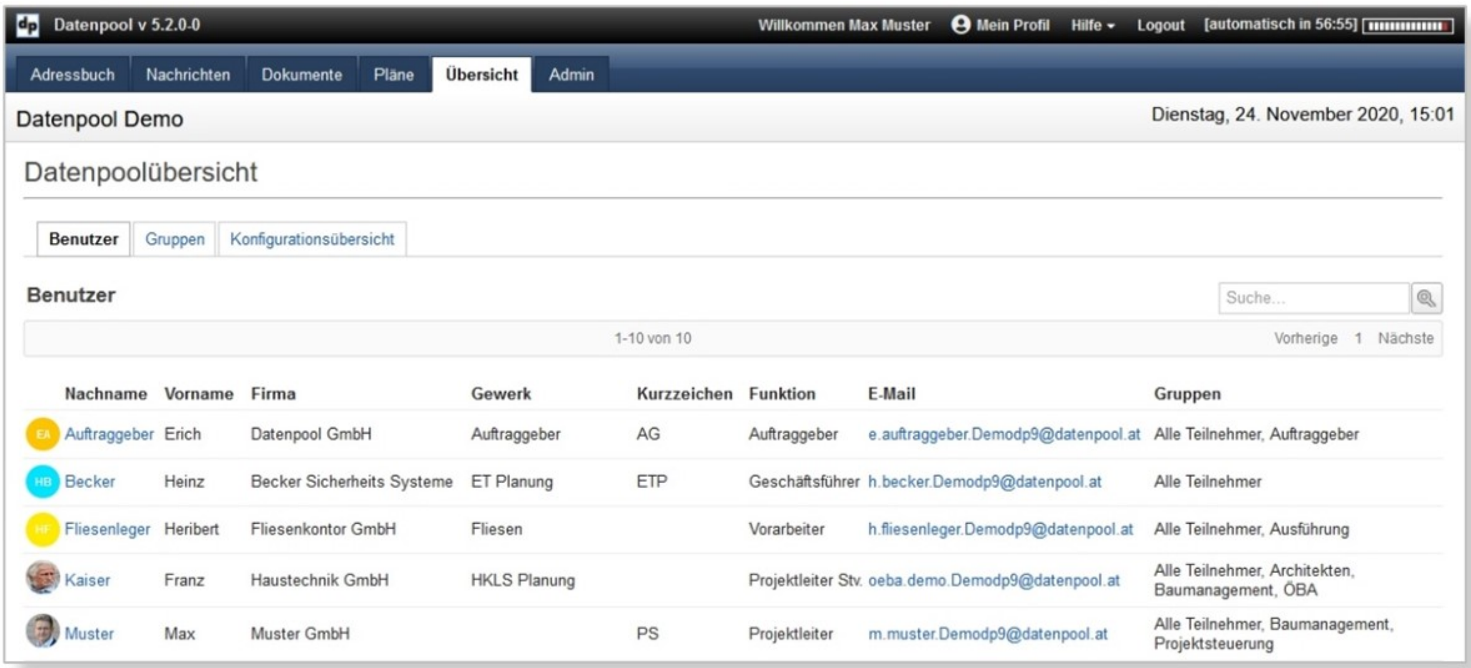
1. Go to the Address Book tab and select all the addresses you want to export in the view. To create an address list with all addresses, no entries need to be marked.
2. Click the Export Address List button and choose from the pulldown menu of the dialog box whether to create a list of the selected addresses or all of them.
3. Confirm the selection by clicking on the "**Export**" button. The address list is created by the system and made available for download as an Excel list.

TIP

To be able to mark the desired entries for address export even if you have a large number of addresses, expand the number of lines displayed in the footer of the address range. To create an address list with all addresses, no entries need to be marked.

Datenpool Overview

The data pool overview provides all relevant information about users, groups and configuration settings and thus enables quick orientation in the project. The areas are organized in their own registers, which can be opened by clicking on the register name.



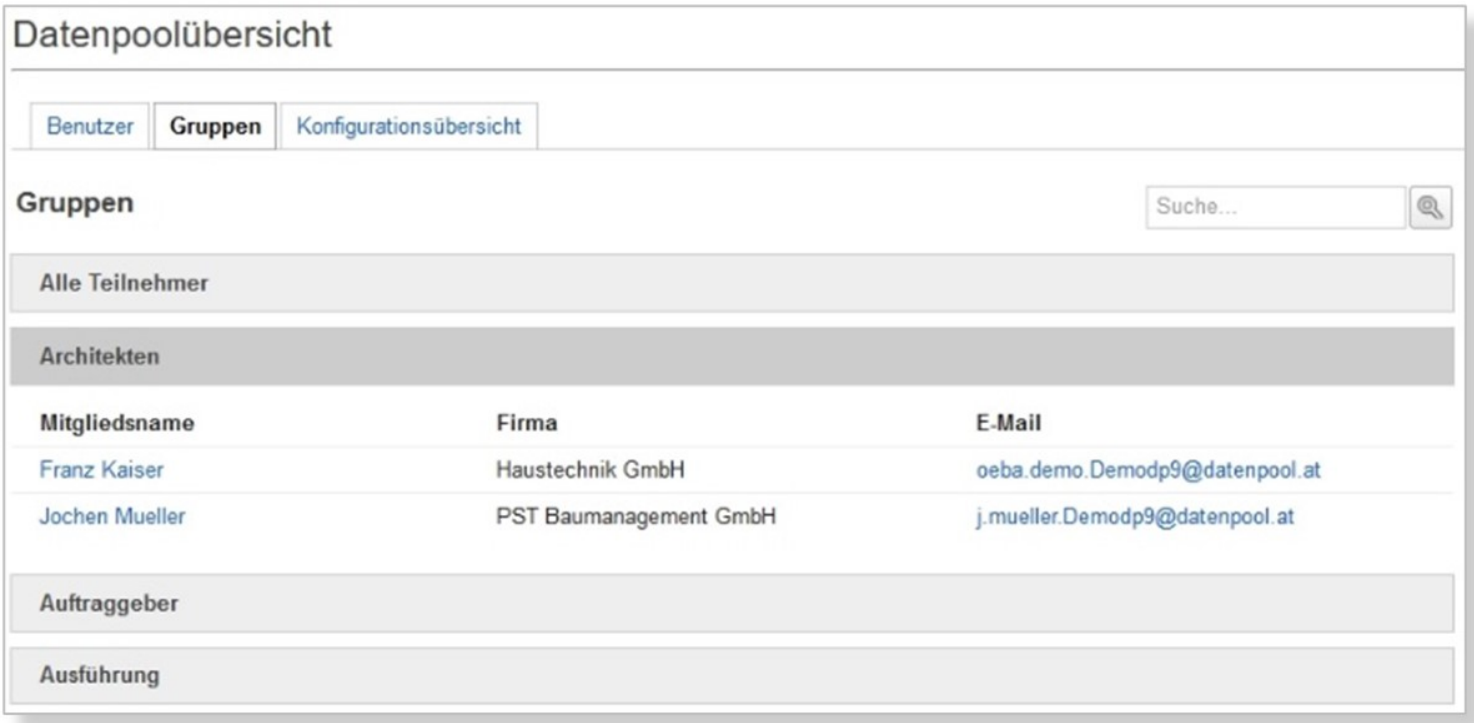
Users

The tab shows all current users in the project with the most important contact details, the trade, the function and the group assignment in the project. The following functions are available in the Users tab:

- **Avatar**:
  - For each user, the system creates an avatar with the initials. If a photo has been stored in the personal profile, the photo is displayed instead of the avatar. If you swipe the mouse over the photo, an enlarged view is displayed.
- **Surname**:
  - Clicking on a person's last name opens the corresponding user profile with the general information.
- **Abbreviation**:
  - The column provides information about the assigned abbreviation, which is also used to prefill the name of new documents.
- **Email**:
  - By clicking on an e-mail address, a new e-mail is created and the selected address is entered as the recipient.
- **Groups**:
  - For each user, the assigned authorization groups are displayed here.
- **Search**:
  - The search field can be used to search for any term. These can also be parts of words or individual letter combinations. All entries containing the searched term are displayed in the result.

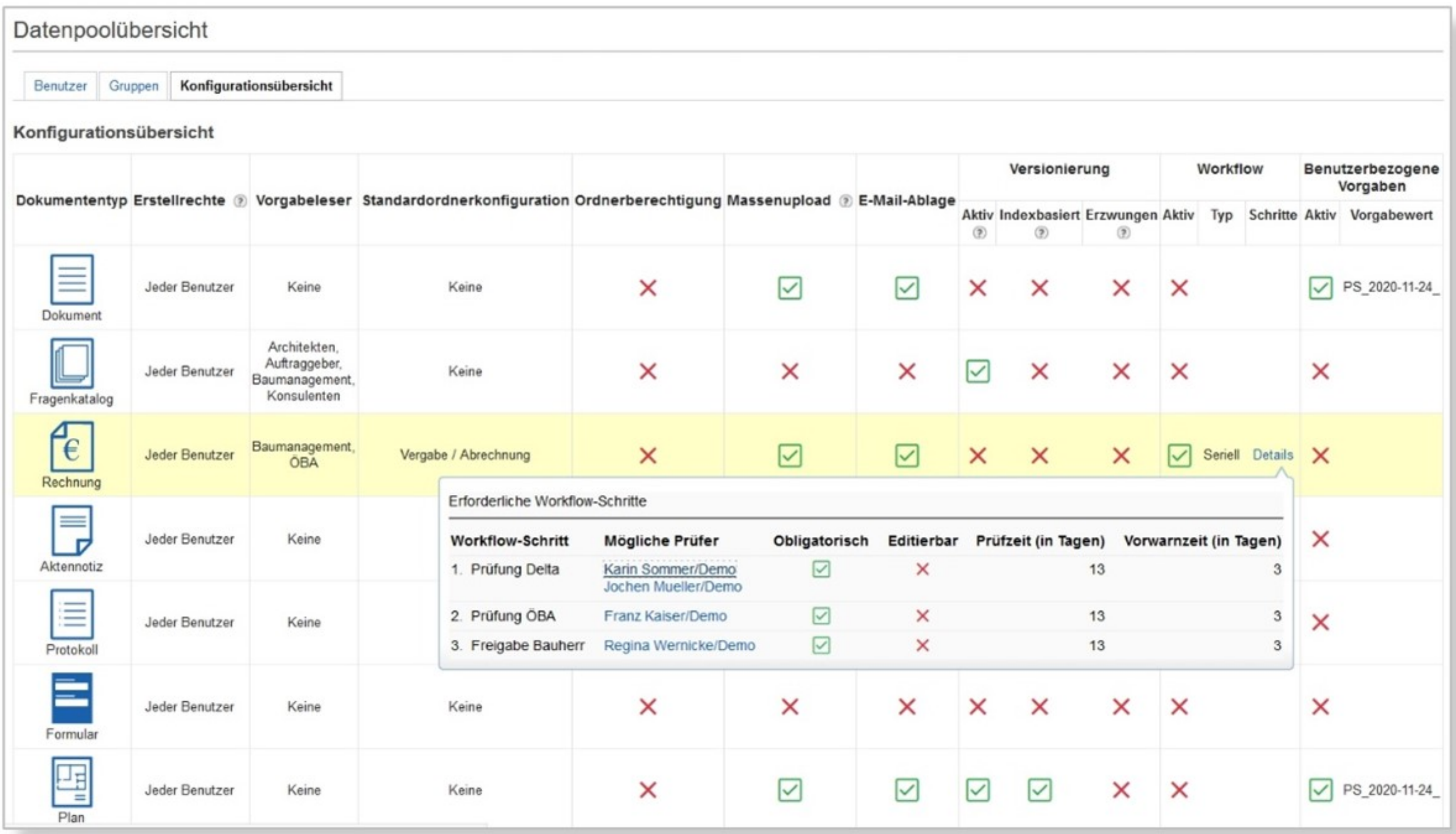
Groups

The tab shows all preconfigured authorization groups of the current data pool with the assigned persons. By clicking on the group name, the people of the group are displayed. The search for a person returns all the groups to which the person has been assigned.



Configuration Overview

The register provides an overview of all documents and plans that are available in the current data pool. Only those document and plan types that the user is allowed to create in the current project are listed. Next to the document's label and icon, the authorized creators and any relevant configuration settings are displayed.


Datenpoolübersicht

Benutzer | Gruppen | Konfigurationsübersicht

Konfigurationsübersicht

Dokumententyp	Erstellrechte	Vorgabeleser	Standardordnerkonfiguration	Ordnerberechtigung	Massenupload	E-Mail-Ablage	Versionierung Aktiv	Versionierung Indexbasiert	Versionierung Erzwungen	Workflow Aktiv	Workflow Typ	Workflow Schritte	Benutzerbezogene Vorgaben Aktiv	Benutzerbezogene Vorgaben Vorgabewert
Dokument	Jeder Benutzer	Keine	Keine	✗	✓	✓	✗	✗	✗	✗			✓	PS_2020-11-24_
Fragenkatalog	Jeder Benutzer	Architekten, Auftraggeber, Baumanagement, Konsulenten	Keine	✗	✗	✗	✓	✗	✗	✗			✗	
Rechnung	Jeder Benutzer	Baumanagement, ÖBA	Vergabe / Abrechnung	✗	✓	✓	✗	✗	✗	✓	Seriell	Details	✗	
Aktennotiz	Jeder Benutzer	Keine											✗	
Protokoll	Jeder Benutzer	Keine											✗	
Formular	Jeder Benutzer	Keine	Keine	✗	✗	✗	✗	✗	✗	✗			✗	
Plan	Jeder Benutzer	Keine	Keine	✗	✓	✓	✓	✓	✗	✗			✓	PS_2020-11-24_

Erforderliche Workflow-Schritte

Workflow-Schritt	Mögliche Prüfer	Obligatorisch	Editierbar	Prüfzeit (in Tagen)	Vorwarnzeit (in Tagen)
1. Prüfung Delta	Karin Sommer/Demo Jochen Mueller/Demo	✓	✗	13	3
2. Prüfung ÖBA	Franz Kaiser/Demo	✓	✗	13	3
3. Freigabe Bauherr	Regina Wernicke/Demo	✓	✗	13	3

- **Creation rights**:
  - specifies which users can create this document type.
- **Default reader**:
  - lists those groups of people who have been entered as readers in the document configuration.
- **Default Folder Configuration**:
  - Specifies which filing folders have been preconfigured for the document type.
- **Folder Permission**:
  - Specifies whether the document is automatically permissioned by the drop folder.
- **Massenupload**:
  - Specifies whether the document has a bulk upload enabled.
- **eMail Ablage**:

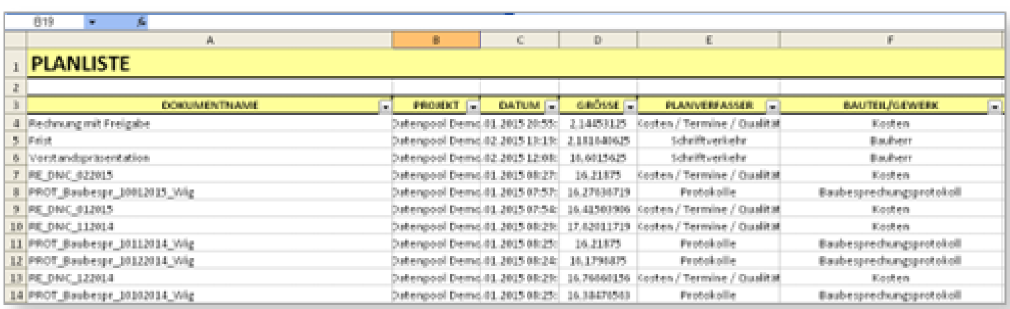
- Specifies whether the document can be selected for the storage of incoming mails.

- **Versioning**:
  - Specifies whether versioning has been enabled for the document, how the index is configured, and whether there is forced versioning.
- **Workflow**:
  - Specifies whether a workflow has been enabled for the document and whether the document review and approval flow is configured serially or in parallel. By clicking on the "**Details**", all details of the workflow review steps with the responsible reviewers are displayed.
- **User-Related Defaults**:
  - Specifies whether default document label values have been defined for the document type. The composition of the default value is defined in the configuration and usually contains a short description of the trade, as it was stored in the personal profile (see 13. Settings in the personal profile).

Printout of plan lists

The plan management provides a function for printing out plan lists. For the selected plans of a view, a plan list is generated and made available for download.

> **PRINT PLAN LISTS**
>
> To print sheet lists for selected sheets:
>
> 1. Select the sheet documents for which you want to create a sheet list by clicking the checkbox to the left of the sheet label. The selection of documents can also be done using one of the search functions.
> 2. Click the "**Export**", and select the desired sheet list in the dialog box.
> 3. Confirm the selection by clicking on the "**OK**". The plan list is created by the system as a Microsoft Excel file and made available for download.



PLANLISTE

DOKUMENTNAME	PROJEKT	DATUM	GRÖSSE	PLANVERFASSER	BAUTEIL/GEWERK
Rechnung mit Freigabe	Datenpool Demo	01.2015 20:55:	2.14453125	Kosten / Termine / Qualität	Kosten
Frist	Datenpool Demo	02.2015 13:19:	2.181640625	Schriftverkehr	Bauherr
Vorstandspräsentation	Datenpool Demo	02.2015 12:08:	16.6015625	Schriftverkehr	Bauherr
RE_DNC_022015	Datenpool Demo	01.2015 08:27:	16.21875	Kosten / Termine / Qualität	Kosten
PROT_Baubespr_10012015_Wlg	Datenpool Demo	01.2015 07:57:	16.27636719	Protokolle	Baubesprechungsprotokoll
RE_DNC_012015	Datenpool Demo	01.2015 07:54:	16.41503906	Kosten / Termine / Qualität	Kosten
RE_DNC_112014	Datenpool Demo	01.2015 08:29:	17.62011719	Kosten / Termine / Qualität	Kosten
PROT_Baubespr_10112014_Wlg	Datenpool Demo	01.2015 08:25:	16.21875	Protokolle	Baubesprechungsprotokoll
PROT_Baubespr_10122014_Wlg	Datenpool Demo	01.2015 08:24:	16.1796875	Protokolle	Baubesprechungsprotokoll
RE_DNC_122014	Datenpool Demo	01.2015 08:29:	16.76660156	Kosten / Termine / Qualität	Kosten
PROT_Baubespr_10102014_Wlg	Datenpool Demo	01.2015 08:25:	16.34476563	Protokolle	Baubesprechungsprotokoll

Settings in the personal profile

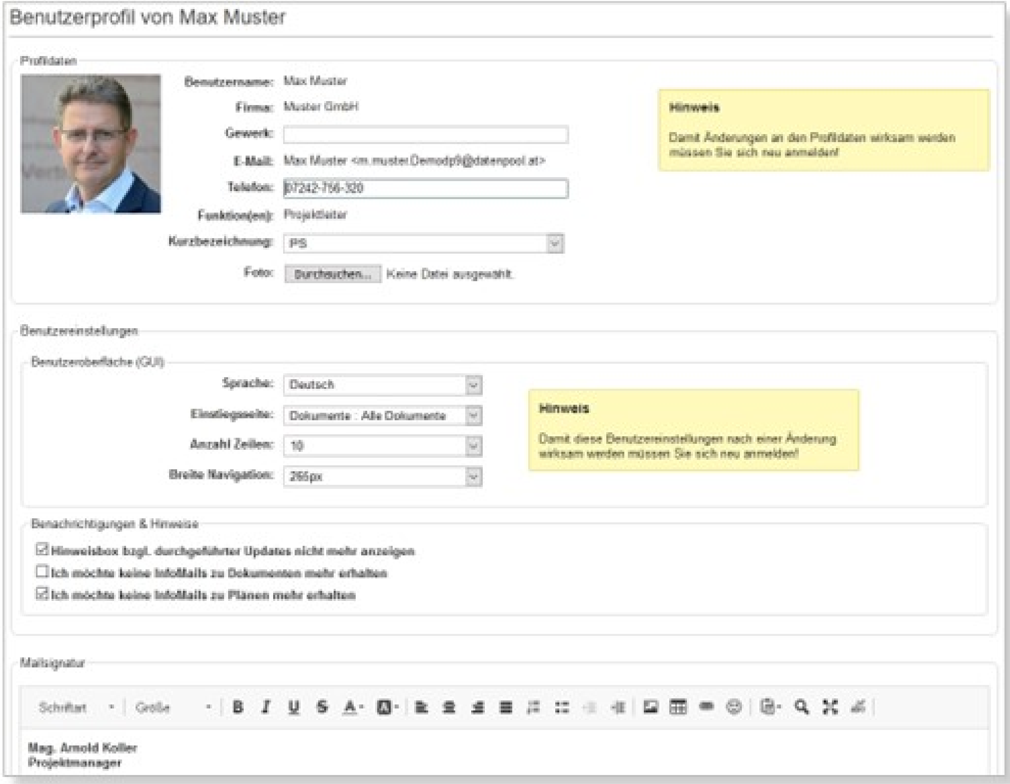
Various settings can be made in the personal profile that make it easier to work with the data pool. In addition to the display options, the profile photo can be uploaded, the desired language can be set, the signature can be created and the password can be changed. In addition, the commissioned trade and the abbreviation that is used as the default value when creating new documents are stored in the personal profile.

All changes in the personal profile with the exception of the password will only take effect when the data pool has been restarted.

MAKE CHANGES TO YOUR PERSONAL PROFILE

To make changes to your personal profile:

1. Click the "**My profile**" in the header of the browser window to open your personal profile.
2. Click the "**Edit**" at the bottom of the window to switch to edit mode.
3. Make the desired settings.
4. Confirm the entry by clicking on the "**Save**" to finish typing.
5. Exit the data pool using the "**Logout**" in the header of the view and restart the data pool for your changes to take effect. Alternatively, you can switch to the desired view after saving to continue your work with the data pool.

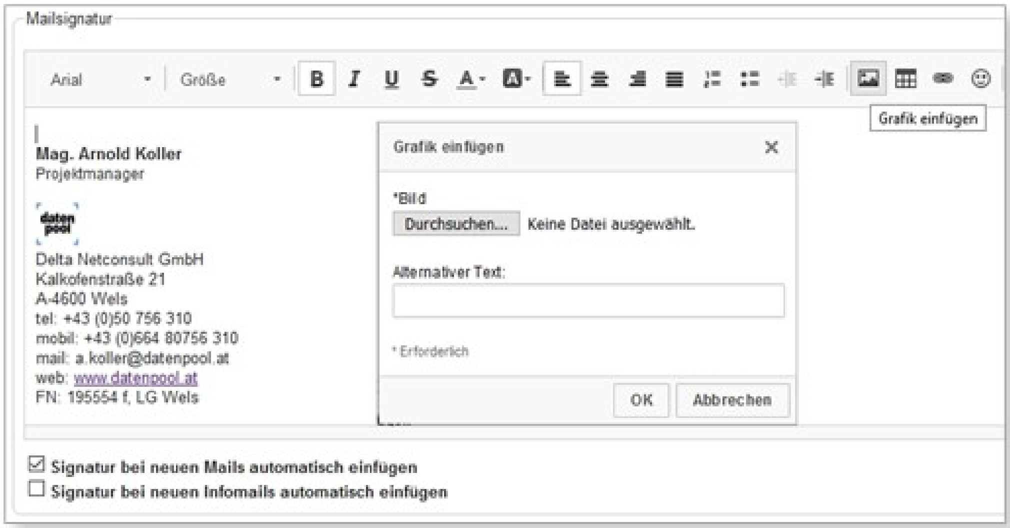


You can make the following settings in your personal profile. Note that some settings will only become active after the next login to the system.

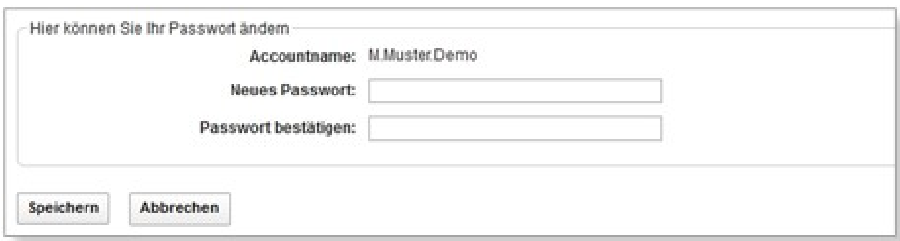
- **Profile**:
    - This section displays the master data that was used to create your account. The existing data can be supplemented by the telephone number, the short name of the trade and a photo.
- **Abbreviation**:
    - The abbreviation of your trade is used for the default value of the document designation and is automatically filled in by the system for each new document.
- **Photograph**:
    - In this field, you can upload a photo in 180 x 240 pixel format.
- **User Settings**:
    - In this area, you can set the desired language and set the entry page when the data pool starts. In addition, the number of displayed lines per page and the width of the navigator can be defined here.
- **Set Language**:

- The desired language can be selected via the pull-down menu. De-pending on the project, different languages may be available, each of which can be selected individually by the user. The changes will not take effect until the data pool is restarted.

- **Home page**:
  - From the pull-down menu, the view to be used when starting the data pool can be selected.
- **Number of lines**:
  - To adjust the views in the data pool to the size of your screen, the number of rows displayed can be selected here.
- **Wide navigation**:
  - To adjust the navigator in the data pool to the size of your screen, the width of the navigator can be set here.
- **Notifications**:
  - In this area, the infomails for documents and plans can be deactivated. Please note that documents will be validly delivered even if the infomails have been deactivated. A regular active review of the data pool is therefore mandatory.
    If the infomails for documents and plans have been deactivated, a note and an entry in the processing log are sent when infomails are sent. In addition, the information box with information about updates and new functions can be deactivated in this area.
- **Mailsignatur**:
  - In this area you have the option of storing your signature for e-mail traffic. If you want the signature to be inserted automatically with each mail, activate the corresponding option at the end of the area. The same option is also available for Infomails are available.
    Signatures that consist of text only can be inserted with copy and paste. The buttons in the header of the text field can be used to edit the text and adapt it to the desired layout.
    If you also want to use a graphic in your signature, it must be created using the "**Insert Graphic**" button. In the dialog box, select the desired graphic, and when confirming the selection, the graphic is uploaded and inserted at the cursor position.



- Change password:
  - In this section you can change your password. After entering the new password and confirming, the entry with "**Save**". Depending on the selected security settings, the browser asks in a dialog box whether the password should be saved. Confirm the dialog box if you want to save the login and password in the browser. If the password has also been saved in the browser, the user data and password are suggested when logging in and can be confirmed by clicking "**Enter**".



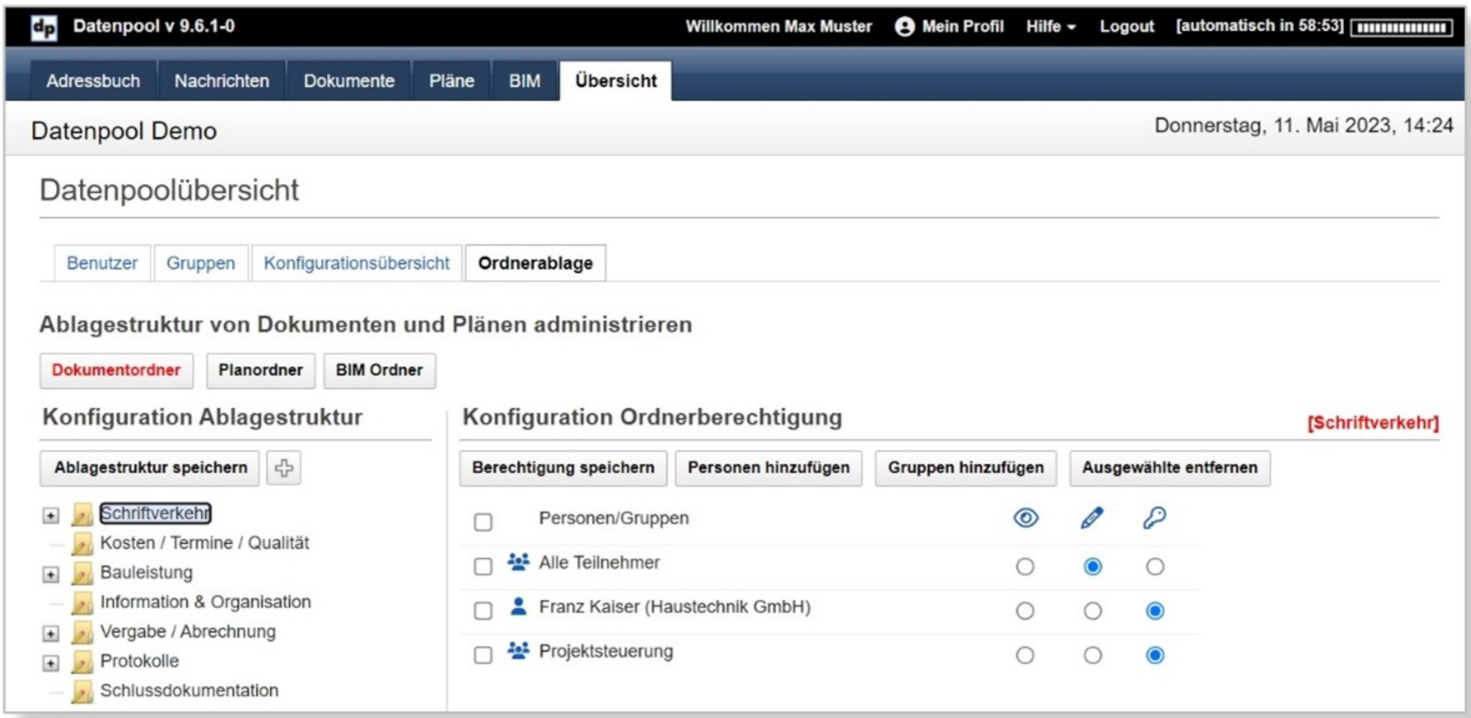
TIP

When you enter text with "**Enter**" to the new line, the system inserts a paragraph and the line spacing is 1.5 lines.
To get a simple line spacing, you have to switch to the new line with the key combination "**Shift**" and "**Enter**". This does not insert a paragraph, but a simple line spacing.

Organizer administration

The creation and administration of filing folders can be carried out by the users themselves in the data pool. The prerequisite for this is administrator rights for the folder structure, which are assigned by the responsible project manager depending on the project organization.

A separate view is available for the administration of the filing folders, which can be opened via the "**Overview**" tab. All settings can be made in the "**Folder Storage**" tab.

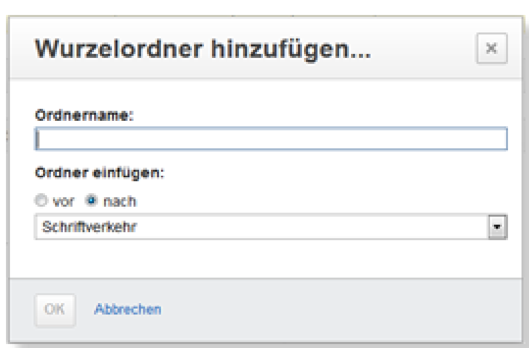


Creating New Folders

Depending on the authorization, users can create storage folders for documents or plans in the data pool. After saving the edited folder structure, the new folders in the data pool are immediately available.

> **CREATE NEW FOLDERS**
>
> To create filing folders for documents and plans:
>
> 1. Click on the "**Overview**" tab in the header of the browser window to open the administration area.
> 2. Click the Folder Tray subtab
> 3. Select the filing area you want to administer using the "**Document folder**" or "**Plan folder**“. The current filing structure is displayed and can now be edited.
> 4. To create a new main folder, click the `"+"` and enter the name of the folder in the dialog box. Using the "**Insert Folder**" can be used to specify where the new folder is inserted.
> 5. To create a new subfolder, open the folder levels by clicking on the plus symbol and right-clicking on the folder to which the subfolder is to be added. In the dialog box, select the "**Add folder**“.
> 6. Right-click on the newly created folder and select the "**Rename folder**“. In the dialog box, type the name of the new folder and close the input with "**OK**".
> 7. Left-click and hold the folder to drag the newly created folder to the desired position between the existing folders.
> 8. Repeat steps 4 through 6. For all subfolders that you want to create.
> 9. Close the editing of the folder structure by clicking on the "**Save the filing structure**". Your changes will be applied and the new folders will be created in the system.

Dialog Box for Creating a New Root Folder

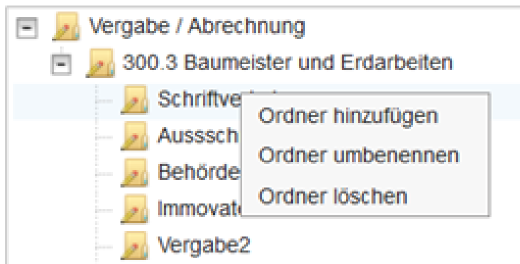


CAUTION

When creating a root folder, only the current editor is initially entered in the authorization. Therefore, the authorization for reading or storing documents must also be assigned step by step, otherwise no other users can store documents or plans in the new folder. The changed values are applied via the "**Save permission**" button.
For all other filing folders, the permission is automatically inherited from the parent filing folder and only needs to be changed when necessary.

Changing or Deleting Folders

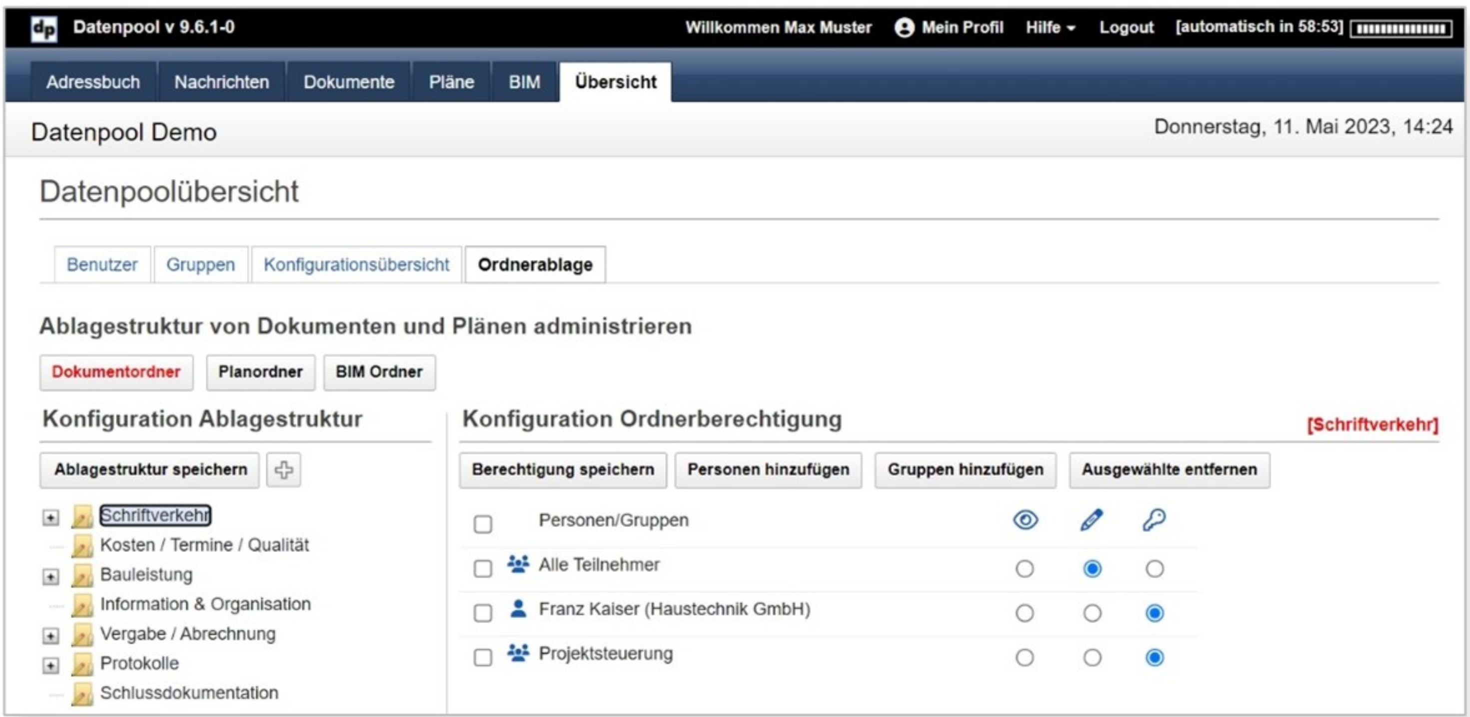
Individual folders of the filing structure can also be changed or deleted afterwards. The prerequisite for deleting folders is that no documents or plans have yet been stored in the folders in question. Renaming folders is possible even if documents have already been stored in the folders.
To change or delete a folder, go to the administration area and right-click on the folder you want to edit. In the dialog box, you can select the option you want.



> **CAUTION**
>
> Administrator rights to edit the folder structure can be restricted to individual folder levels or subfolders. All folders for which you have editing rights are displayed with a pen in the folder icon. For folders without this icon, you do not have edit rights, the options in the dialog box are grayed out.

Editing Folder Permissions

For each filing folder, it is possible to specify which users or user groups have the right to store documents or plans in the folder. The default authorization for all folders is the "**All participants**" group. If the authorization for the storage of documents or plans is to be restricted, the folder authorization must be edited.



In addition, it is also possible to restrict the display of the filing folders in the Navigator for certain users or user groups. This is a basic configuration setting that can be made independently of each other for documents or plans. With this variant, the read rights for filing folders must also be assigned.

EDIT FOLDER PERMISSION

To make changes to folder permission:

1. Click on the "**Overview**" tab in the header of the browser window to open the administration area.
2. Click the Folder Tray subtab
3. Select the filing area you want to administer using the "**Document folder**" or "**Plan folder**", then click the drop folder for which you want to edit permission.
4. Select the "**All participants**" by clicking on the checkbox and selecting the function "**Remove selected**" if you want to restrict the permission.

5. Use the "**Add Person**" or "**Add Group**", select the people or groups for which you want to create an authorization.
6. Use the radio button to specify whether to create read or write permission for this folder. If a general read authorization is stored for all folders for the current data pool, this step is omitted.
7. Save the changes you made using the "**Save permission**“.
8. Repeat steps 2 through 6 for all the drop folders whose permission you want to change.

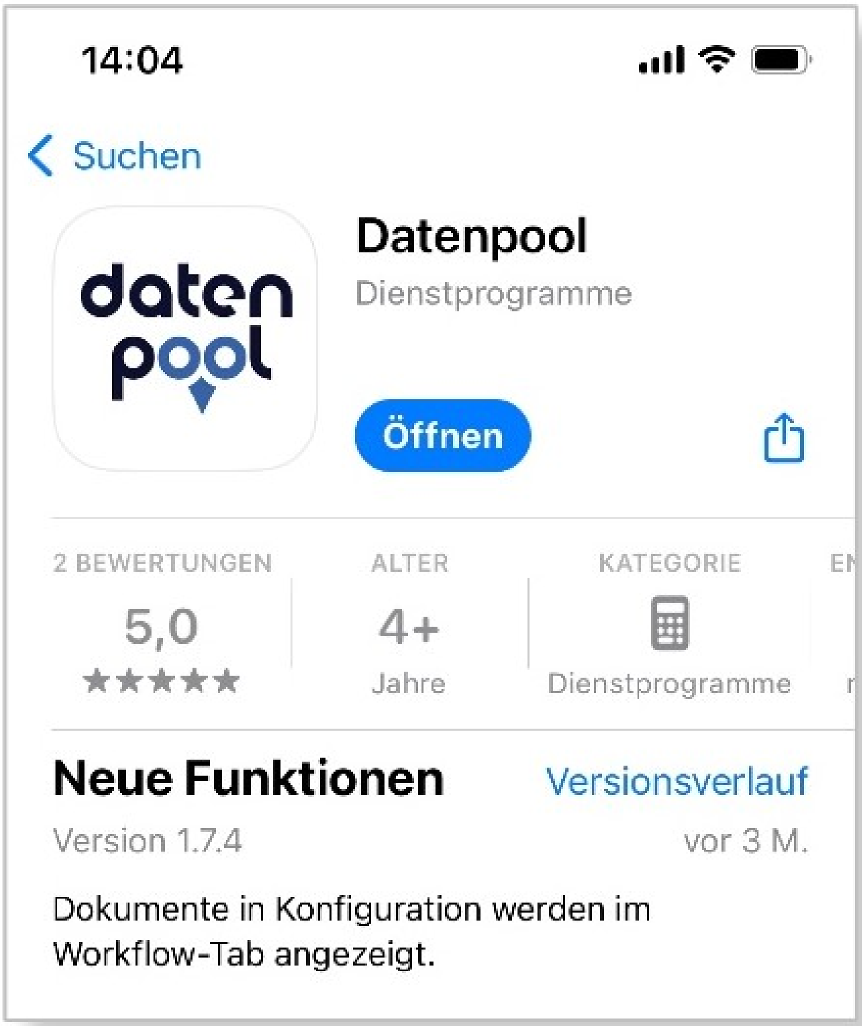
CAUTION

In order to be able to select a subfolder when creating a new container, the correct permission must also be assigned to all higher-level storage folders.
It is therefore not sufficient to add a new person or group of people to a subfolder, the permission must also be added to the parent folders.

Datenpool App

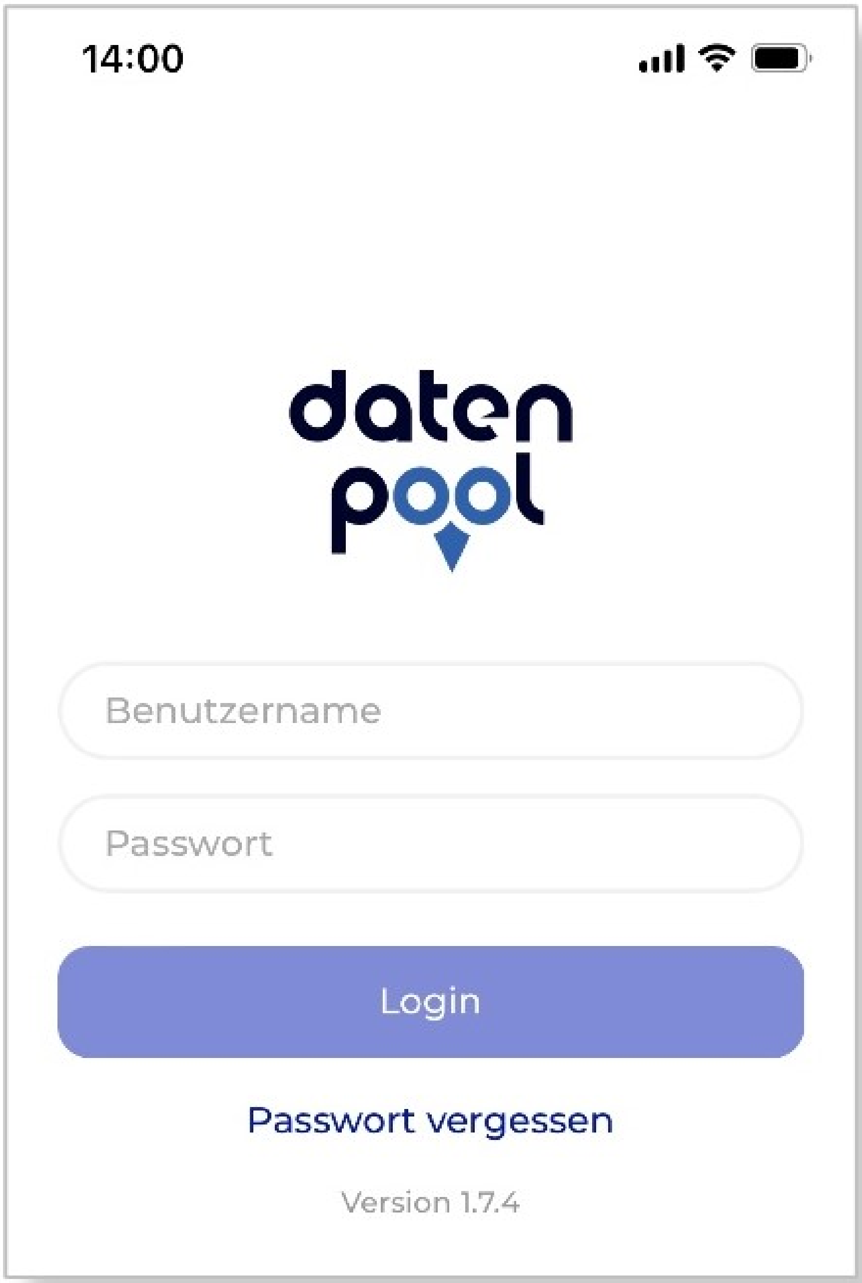
An app is available for the data pool, which can be used to access the data pool via smartphone. The app was developed for the iOS and Android operating systems and can be downloaded free of charge from the App Store.

To install the app, open the App Store and search for the term: "**data pool**".

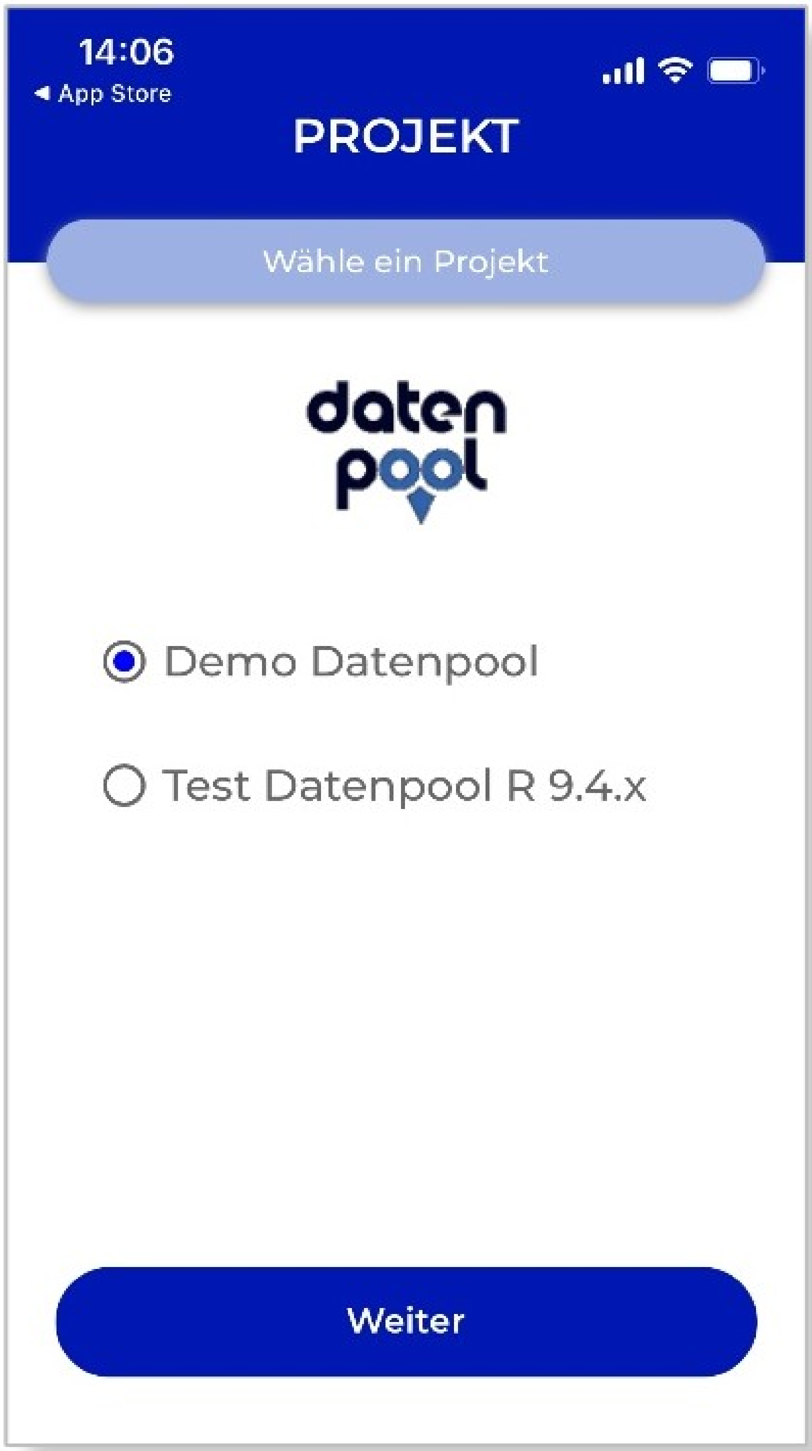


Access data and login

The prerequisite for access to the data pool is a valid username with password. The same access data must be used to log in to the Datenpool APP as in the browser version. After opening the Datapool APP, enter the username and password, and log in to the Datapool via the "**Login**" button.

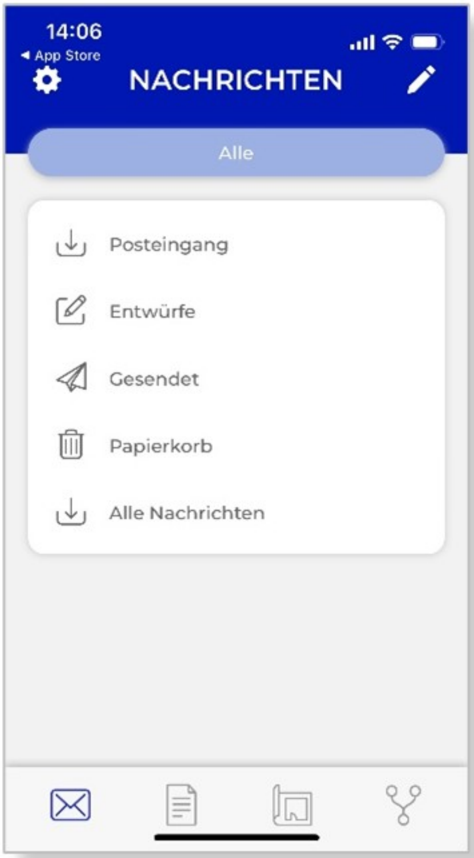


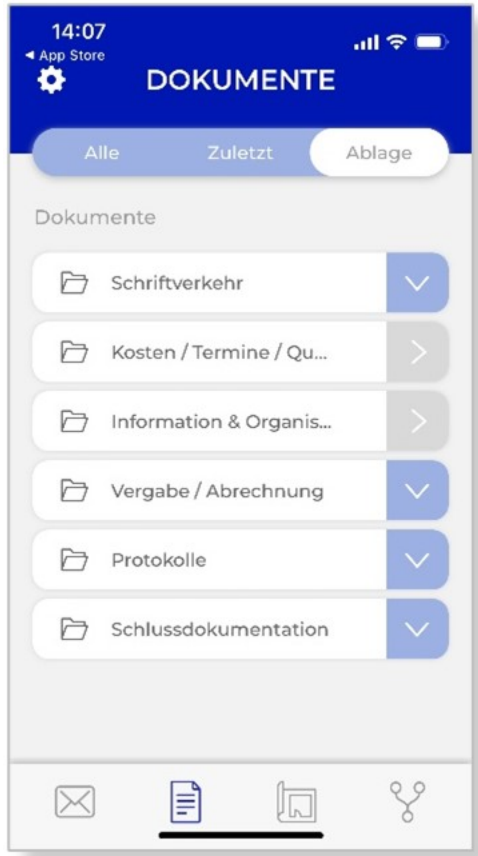
If you're working on multiple projects, the app will show you a list of all the projects you have access to with your account in the next step. Select the desired project and confirm the selection via the "**Next**" button to connect to the project.

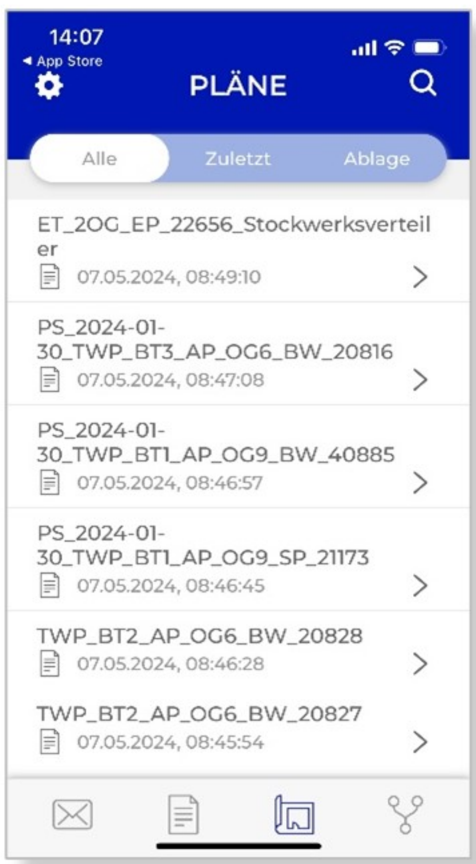

14:06
◄ App Store
PROJEKT
Wähle ein Projekt
Demo Datenpool
Test Datenpool R 9.4.x
Weiter

Project Data and Storage Structure

To access the project data, there are several views available in the app, which can be selected via the footer of the app. The views correspond in structure to the filing system that is available in the browser version of the data pool, in the header you can choose whether all documents, the most recent documents or the filing folders should be displayed.



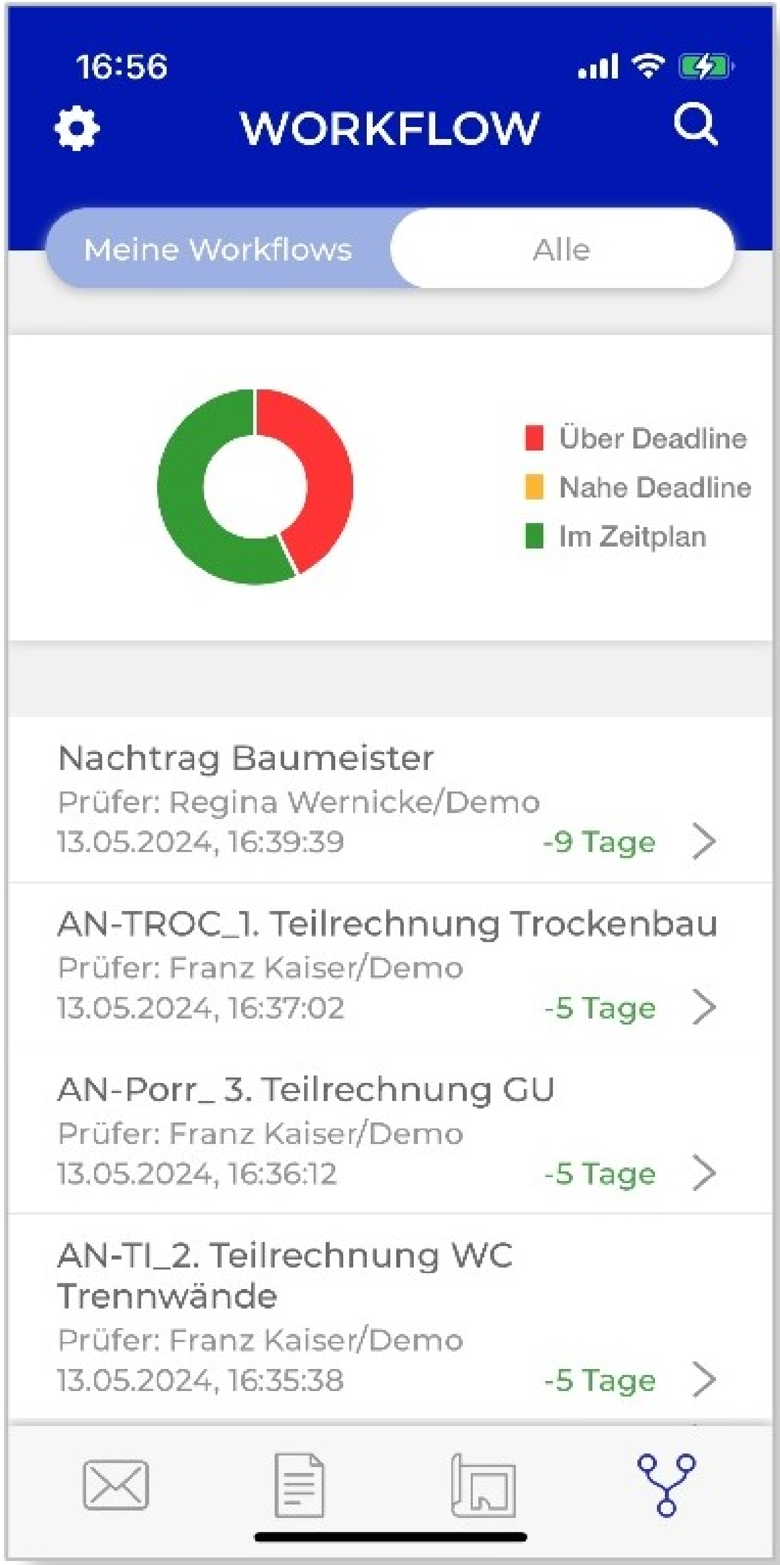




After selecting a document or plan, the contents of the container are opened. In addition to the attachments, the workflow, the editing log and the comments can be accessed.

Workflows

The Datapool APP can also be used to check and approve documents and plans. The documents and plans to be reviewed are listed in a separate view, which also provides a graphical overview of the current status of the approvals.


16:56
WORKFLOW
Meine Workflows
Alle
Über Deadline
Nahe Deadline
Im Zeitplan
Nachtrag Baumeister
Prüfer: Regina Wernicke/Demo
13.05.2024, 16:39:39
-9 Tage
AN-TROC_1. Teilrechnung Trockenbau
Prüfer: Franz Kaiser/Demo
13.05.2024, 16:37:02
-5 Tage
AN-Porr_ 3. Teilrechnung GU
Prüfer: Franz Kaiser/Demo
13.05.2024, 16:36:12
-5 Tage
AN-TI_2. Teilrechnung WC Trennwände
Prüfer: Franz Kaiser/Demo
13.05.2024, 16:35:38
-5 Tage

Switching Projects

If you have access to multiple projects, you can switch between the projects in the Datapool APP.
To switch to another project, select the settings of the app in the header and select the desired project from the list. Optionally, you can specify which tab should be displayed by default when the project is opened. By exiting the settings via the arrow in the header, the app switches to the selected project.