

	USER MANUAL
PRESTPUBLI USER GUIDE	VERSION: 02
PUBLICATIONS OFFICE	PRIORITY STATUS: NORMAL

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1 Introduction

The current document comprises the User Manual for the Prestpubli application. It describes the functionality available to the end users of the Prestpubli application and includes the following:

- General
 - Homepage
 - Language selection
 - Online help
 - Paging
 - Filtering
 - Sorting
 - Export data
- Search
- Authentication
- Statistics
- Contacts
 - Users mailing list
 - Personal account details
- Administration
 - Management of general data section
 - Management of users
 - Management of roles
 - Management of services
 - Management of modules
 - Management of fields
- Assistance
- Forecasts
 - View list of forecasts
 - Create draft forecast
 - Edit draft forecast
 - Cancel draft forecast
 - Reactivate forecast
 - Delete draft forecast
- Requests
 - View list of requests
 - Create request
 - Edit draft request

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- Cancel draft request
- Reactivate request
- Delete draft request
- Submit request
- Edit submitted request
- Versioning

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2 General

The general functionalities are:

- Homepage
- Language selection
- Online help
- Paging
- Filtering
- Sorting
- Export data

2.1 *Homepage*

You may access the homepage either when logging in the application or by clicking the “Home” link of the top right menu

[Home](#) | [Publicare](#) | [About](#) | [Help](#) | [Logout](#) | English (en) ▼

2.2 *Language selection*

You may change the application’s language by selecting a language from the drop down list of the top right menu

[Home](#) | [Publicare](#) | [About](#) | [Help](#) | [Logout](#) | English (en) ▼

Note1: The English translation is used for labels that are not translated in the selected language

Note2: If you have an administrator role, you may select “Debug” from the drop down list to activate the language debug mode. This option will allow to view the keys instead of the values of the labels.

2.3 *Online help*







You may view the online help of the whole application by clicking the “Help” link of the top right menu

[Home](#) | [Publicare](#) | [About](#) | [Help](#) | [Logout](#) | English (en) ▼

2.4 *Paging*

You may use paging on the pages where data is displayed in the form of a list. The system displays information on the number of found items and the respective displayed range
382 item(s) found, displaying 1 to 15. and provides the following options:

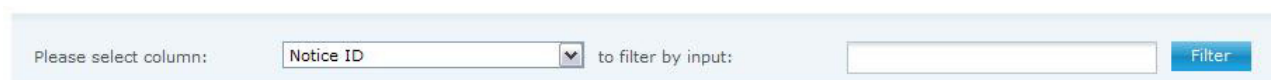
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1. Hyperlinked number of the pages starting from 1 (if there are more than 10 then the system will display [...] followed by the last page number). The currently accessed page, is not hyperlinked 
2. "Next" link – the system redirects to the next page 
3. "Previous" link – the system redirects to the previous page 
4. "Last" link – the system redirects to the last page 
5. "First" link – the system redirects to the first page 
6. "Display items per page" – drop down list with values {5, 15, 25, 50, 100}


2.5 Filtering

You may use the filtering functionality to easily find specific data or group of data that match the given criteria



1. Select a parameter from a drop down list
2. The system displays the respective format in the parameter input box (i.e. date picker if the column selected is start/end date, etc.)
3. Insert the desired value in the input box
4. Click on the **FILTER** button or press Enter
5. The system displays the respective items



Note: Filtering is case insensitive

2.6 Sorting

You may use sorting on the pages where data is displayed in the form of a list

1. Click on the title of one of the column that needs sorting
2. The system sorts the rows in descending/ascending   order respectively based on the type of the particular column (i.e. alphabetically if the column contains text, by date if the column contains dates, etc.)

2.7 Export data

You may use this functionality to export the displayed results

1. Select at least one of available formats : PDF, XML or XLS
2. Click on the **EXPORT** button
3. The system displays a popup window prompting the user to open or save the file locally



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

Note: If you select only one format, the file will be in the selected format and if you select more than one format, the respective files will be created inside a ZIP archive



3 Search

1. Access the “Search” section from the top menu

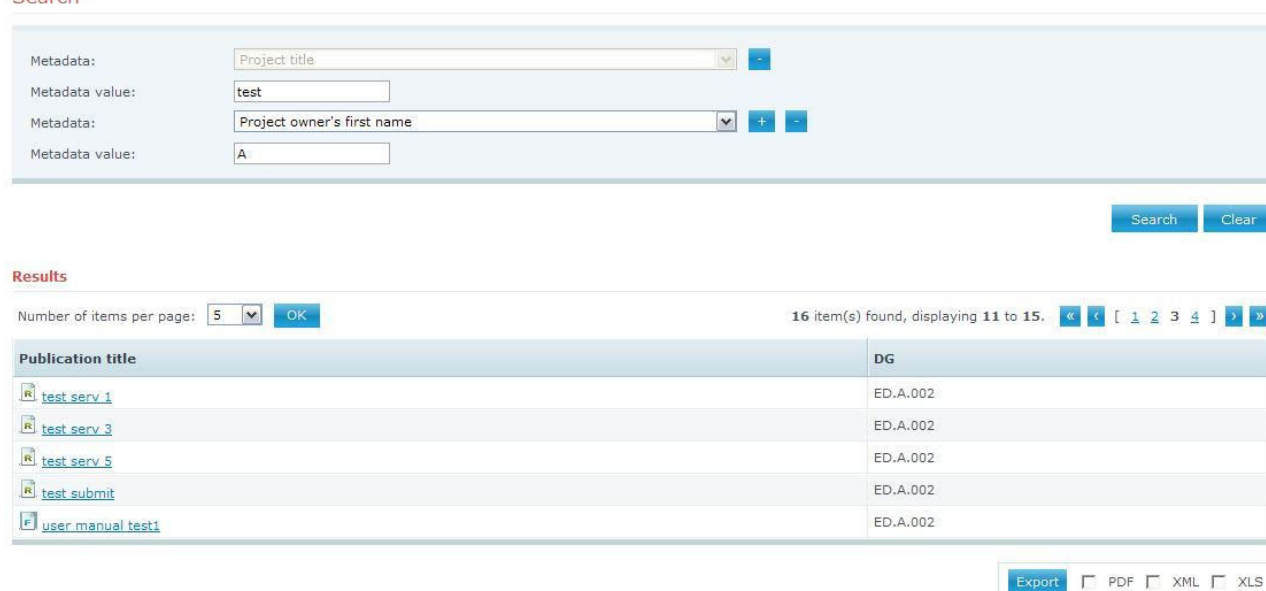
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[ASSISTANCE](#) |
 [FORECASTS](#) |
 [REQUESTS](#) |
 [STATISTICS](#) |
 [SEARCH](#) |
 [CONTACTS](#) |
 [ADMINISTRATION](#)

- Provide the following:
 - “Metadata”: The type of the metadata to search for
 - “Metadata value”: The text that you search for
- Click the   to add or remove metadata to search for
- Click on the **SEARCH** button
- The results will be retrieved matching the input provided

The icon in front of the title (/) shows if it is a forecast or a request and the DG column shows which DG that forecast or request belongs to. You preview a forecast or a request by clicking the link of the “Publication title”.

Search



The screenshot shows the Search interface with the following elements:

- Search Criteria:**
 - Metadata: Project title (dropdown menu)
 - Metadata value: test (text input)
 - Metadata: Project owner's first name (dropdown menu)
 - Metadata value: A (text input)
- Buttons:** Search, Clear
- Results Section:**
 - Number of items per page: 5 (dropdown menu) OK
 - 16 item(s) found, displaying 11 to 15.
 - Navigation: « ‹ [1 2 3 4] › »
 - Table:**






Publication title	DG
 test serv 1	ED.A.002
 test serv 3	ED.A.002
 test serv 5	ED.A.002
 test submit	ED.A.002
 user manual test1	ED.A.002
 - Export Options:** Export, PDF, XML, XLS

Figure 1: Search Results

Note1: You may clear the provided parameters and results by clicking the Clear button

Note2: You may export the results by selecting one or more desired formats and click the Export button



Export ☐ PDF ☐ XML ☐ XLS

4 Authentication

The functionalities for the Authentication section are:

- Login the application
- Logout of the application

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4.1 *Login the application*

1. Enter the appropriate credentials in the application's login page (user id and password)
2. The system displays the application's homepage

Note: If you forgot the password, you may click on the “Forgot your password” link. The system will redirect to ECAS homepage and you may use ECAS functionalities to retrieve the forgotten password

4.2 *Logout of the application*

You may logout from the application by clicking the “Logout” link of the top right menu

[Home](#) | [Publicare](#) | [About](#) | [Help](#) | [Logout](#) | English (en) ▼

Note: You will be logged out from the application but not from ECAS

5 Statistics

1. Access the “Statistics” from the top menu

2. Provide the following:
 - a. “Type”: Request or Forecast:
 - b. “Year”: The year from the drop down list that the statistics is searching for
3. Click on the **VIEW STATISTICS** button
4. The results will be retrieved matching the input provided

The columns of the table represent the total number of drafts, requested/submitted, cancelled, and deleted forecasts or requests for each DG in the selected year.

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View Statistics

Please select type: ☐ Request ☒ Forecast

Please select year: ▼

[View Statistics](#) [Clear](#)

List of results

Number of items per page: ▼ [OK](#) Page 1 from 1

DG	Number of draft forecasts	Number of requested forecasts	Number of canceled forecasts	Number of deleted forecasts
ED.A.002	1	0	0	0
ED.TEST.001	2	1	1	0

[Export](#) ☐ PDF ☐ XML ☐ XLS

Figure 2: Statistics Results

Note1: You may clear the provided parameters and results by clicking the Clear button

Note2: You may view the details of a result by clicking the link in the appropriate “DG”. The popup that contains the total number of draft, requested/submitted, cancelled and deleted forecasts or requests for that DG in the selected year will appear. It will also contain the total number of forecasts or requests grouped by category, type of medium, type of publication, theme and target readership if the total number is greater than zero for that DG in the selected year

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Figure 3: Detailed Statistics

Note3: You may export the results by selecting one or more desired formats and clicking the Export button



6 Contacts

The functionalities for the Contacts section are:

- Users mailing list
- Personal account details

6.1 Users mailing list

1. To access "User mailing list" select Contacts → Mailing list option the from left menu
2. Provide the following:
 - a. "Institution": All or one specific institution from the drop down list
 - b. "Role": All or one specific role from the drop down list
3. Click on the **SEARCH** button
4. The results will be retrieved matching the input provided

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The result table shows a mailing list of application users. The columns of the table represent name, telephone, email, institution user belongs to, assigned roles and activity status of the user respectively.

User mailing list

Institution: Role:

List of users

Number of items per page: Page 1 from 1

Institution	Name	Telephone	Email	Active	Roles
ED.A.002	User Administrator	12345	admin@eurodyn.com	✓	Admin
ED.TEST.001	1 Test User	+(000) 12345	miroslav.plese@eurodyn.com	✓	Consultation User
ED.TEST.001	2 Test User	+(000) 12345	miroslav.plese@eurodyn.com	✓	Author

<< Back ☐ PDF ☐ XML ☐ XLS

Figure 4: User Mailing List

Note1: You may export the results by selecting one or more desired formats and clicking the Export button

☐ PDF ☐ XML ☐ XLS

Note2: You may access the “Contacts” section by clicking the << Back link

6.2 Personal account details

1. To access “Personal account details”, select Contacts → Personal details option from the left menu
2. You may view his/her details
3. Click on the **REDIRECT TO ECAS** button
4. You will be redirected to the ECAS homepage
5. You may use the ECAS functionalities to edit his/her personal details

Personal account details

Institution:

Name:

Telephone:

Email:

Status:

Roles:

<< Back to "Contacts" section ☐ PDF ☐ XML ☐ XLS

Figure 5: Personal Account Details

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Note1: You may export the results by selecting one or more desired formats and clicking the Export button



Note2: You may access the “Contacts” section by clicking the [<< Back](#) link

7 Administration

The functionalities for the Contacts section are:

- Management of General data
 - Help
 - Search
 - Initial Message
 - Label
 - Language
- Management of Users
- Management of Roles
- Management of Services
- Modules
 - Management of fields

7.1 *Management of general data*

The sub-functionalities of this section are:

- List of Helps
- Create new Help item
- Edit Help item
- Delete Help item
- List of Search items
- Edit Search item
- List of Initial messages
- Create new Initial message
- Edit Initial message
- Delete Initial message
- List of Labels
- Edit Label
- List of Languages
- Create new Language

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- Edit Language
- Delete Language

7.1.1 List of Helps

List of helps shows a table with all the helps for the selected language. The columns of the table represent the module/service the help belongs to, the activity status of the help, the help file title and all the available action icons respectively.



1. To view the List of Helps select Administration → General data → Help option from the left menu

Management of Help

Please select column: to filter by input:

Existing entries

Number of items per page: Page 1 from 1

<input type="checkbox"/>	Module/Service	Active	Help file title	Actions
<input type="checkbox"/>	General Help	✓	General Help	 

<< Back

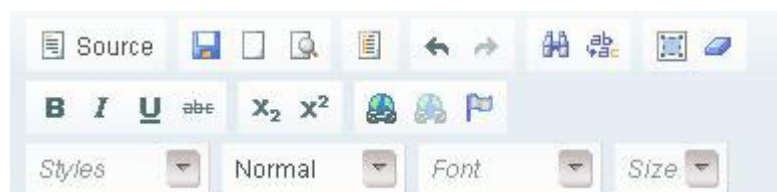
Figure 6: List of Helps

Note1: If there are no helps, the table will not be displayed

Note2: You may access the “Administration” section by clicking the << Back link

7.1.2 Create new Help item

1. To create a new help select Administration → General data → Help option from the left menu
2. Click on the **CREATE NEW HELP** button
3. Provide the following:
 - a. “Module/Service” (mandatory): Drop down list with all available modules/services
 - b. “Active”: Check the checkbox “Yes” if the help should be active. For one module/service we have only one active help
 - c. “Languages”: Select from the drop down list one active language
 - d. “Title”: It is the title of the help. The title is different for all languages
 - e. “Help file content”: It is the content of the help. The content is different for all languages. For help content the system use **WYSIWYG** editor which can provide with type of fonts, size of fonts, create links etc. (**WYSIWYG - What You See Is What You Get**).



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4. Click on the **SAVE** button to save the help
5. The new help is created


Add new Help item

Figure 7: Create New Help Item

Note1: For one module/service you can have only one active help (if at least one is available)

Note2: You may access the “Management of helps” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save a new help

7.1.3 Edit Help item

1. To edit a help, select Administration → General data → Helps option from the left menu
2. Click on the “Edit” icon  of an entry
3. The details of the selected help are displayed
4. Check/uncheck “Active” checkbox and/or edit “Title” and/or edit “Help file content” using **WYSIWYG** editor
5. Click on the **SAVE** button to apply the changes

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Edit Help item

Module/Service: *

Active: ☒ Yes

Languages:

Title:

Help file content:

Source

B **I** **U** **abc** **x₂** **x²**


Styles Font

Lorem ipsum dolor sit amet, consectetur adipiscing elit. Phasellus a mattis lacus. Morbi suscipit ullamcorper aliquam. Mauris volutpat, mauris ac suscipit dapibus, elit quam eleifend tellus, hendrerit volutpat tellus risus vitae arcu. Vivamus et erat nunc, facilisis accumsan justo. Nulla semper dictum mauris at cursus. Donec non turpis turpis. Nunc sed ultricies neque. Aenean vulputate, ipsum malesuada bibendum egestas, lectus ligula interdum dolor, quis aliquet tellus erat nec massa. Suspendisse potenti. Suspendisse vulputate, erat sit amet suscipit pulvinar, est ante mattis massa, sit amet dictum turpis dui non enim. Quisque cursus consectetur justo quis luctus. Nullam id quam in nibh fringilla porta. Aliquam vulputate lacus non orci convallis tincidunt. Integer malesuada ante vel lorem suscipit tincidunt. In a magna erat, id varius nisi. Nunc in est quam. Vestibulum sit amet lorem justo. Nam ultrices magna ac mauris fermentum placerat tincidunt mi feugiat.

Figure 8: Edit Help Item

Note: You may access the “Management of helps” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

7.1.4 Delete Help item

1. To delete one or more helps, select the desired one(s) from the helps list and click on the **DELETE** button
2. Alternatively, click on the “Delete” icon  of an entry

Note1: The help cannot be deleted if it is active

Note2: You may access the “Administration” section by clicking the [<< Back](#) link

7.1.5 List of Search items

The List of Search shows a table with all the fields from all the modules/services. The columns in the table represent metadata name, module/service the field belongs to, activity status of the field and the action buttons respectively. This functionality serves to decide which metadata will be shown in the Search section and in what order.

1. To view the List of Search, select Administration → General data → Search option from the left menu

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Management of Search

Please select column: to filter by input:

*Reordering is available only when filter is clear and paging selection is "All".

Existing entries

Number of items per page: Page 1 from 18 [1 2 3 4 5 6 7 8 9 10 ... 18]

Metadata name	Module/Service	Active	Actions
Requester's first name	Project data	✓	<input type="button" value="Disable"/>
Requester's last name	Project data	✓	<input type="button" value="Disable"/>
Requester's E-mail	Project data	✓	<input type="button" value="Disable"/>
Project owner's first name	Project data	✓	<input type="button" value="Disable"/>
Project owner's last name	Project data	✓	<input type="button" value="Disable"/>

Figure 9: List of Search items

Note: You may access the “Administration” section by clicking the link

7.1.6 Edit Search item

1. To edit search fields, select Administration → General data → Search option from the left menu
2. You may click on the **ENABLE** or **DISABLE** button of the selected search field to activate/deactivate metadata that are shown in the drop down list in Search section
3. You may click on the buttons of the selected search field to reorder metadata that are shown in the drop down list in Search section
4. Click on **SAVE** button to apply the changes

Note1: Reordering is available only when filter is clear and paging selection is "All"

Note2: You may access the “Administration” section by clicking the link. In this case the system does not save the changes

7.1.7 List of Initial messages

The List of Initial messages shows table with all the initial messages for the selected language. The columns of the table represent the initial message file title, the activity status of the initial message and all the available action icons respectively.

1. To view the List of Initial messages, select Administration → General data → Initial messages option from the left menu

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Management of Initial Mesasges

Please select column: to filter by input:

Existing entries

Number of items per page: Page 1 from 1

<input type="checkbox"/> Initial message file title	Active	Actions
<input type="checkbox"/> Welcome to PrestPubli		Edit Delete
<input type="checkbox"/> Welcome	✓	Edit Delete

[<< Back](#)

Figure 10: List of Initial messages

Note1: If there are no initial messages, the table will not be displayed

Note2: You may access the “Administration” section by clicking the [<< Back](#) link

7.1.8 Create new Initial message

- To create a new initial message, select Administration → General data → Initial messages option from the left menu
- Click on the **CREATE NEW** button
- Provide the following:
 - “Active”: Check the checkbox “Yes” if the initial message should be active. The application support only one active initial message.
 - “Title”: It is the title of the initial message. The title is different for all languages
 - “Text”: It is the text of the initial message. The text is different for all languages
- Click on the **SAVE** button to save the initial message
- The new initial message is created

Add new Initial message item

Active: ☐ Yes

Title fr:

Text fr:

Title en:


Text en:

Figure 11: Create New Initial Message

Note: You may access the “Management of languages” section by clicking on the Cancel button. In this case the system does not create a new initial message

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7.1.9 Edit Initial message

1. To edit the initial message, select Administration → General data → Initial messages option from the left menu
2. Click on the “Edit” icon  of an entry
3. The details of the selected initial message are displayed
4. Edit “Title” and/or “Text” and/or check/uncheck “Active” checkbox
5. Click on the **SAVE** button to apply the changes

Edit Initial Message item

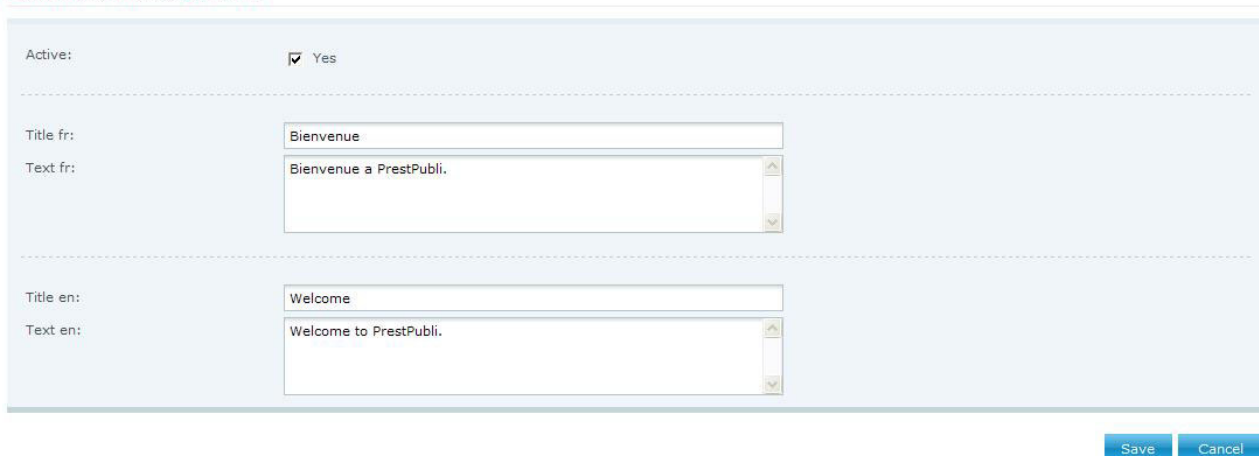



Figure 12: Edit Initial Message

Note: You may access the “Management of initial messages” section by clicking on the Cancel button. In this case the system does not save the changes

7.1.10 Delete Initial message

1. To delete one or more initial messages, select the desired one(s) from the initial messages list and click on the **DELETE** button
2. Alternatively, click on “Delete” icon  of an entry

Note1: The initial message cannot be deleted if it is active

Note2: You may access the “Administration” section by clicking the [<< Back](#) link

7.1.11 List of Labels

The List of Labels shows a table with all the available labels for the selected language. The columns of the table represent the label key, the label name and the “Edit” action icon respectively.

1. To view the List of Labels select Administration → General data → Labels option from the left menu

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Management of Labels

Please select column: to filter by input:

Existing entries

Number of items per page: Page 1 from 146

Label Key	Label Name	Actions
No	No	
NotNull.user.active	Value must be set.	
NotNull.user.validityPeriod	Value must be set.	
Size.label.value	Length must be between {1} and {4} characters.	
Size.role.name	Length must be between {1} and {4} characters.	

[<< Back](#)

Figure 13: List of Labels

Note: You may access the “Administration” section by clicking the [<< Back](#) link

7.1.12 Edit Label

1. To edit label select Administration → General data → Labels option from the left menu
2. Click on the “Edit” icon of an entry
3. The details of the selected label are displayed
4. Edit “Label name” for selected active language
5. Click on the **SAVE** button to apply the changes

Edit Label item

Label Key:

Label Name fr:

Label Name en:

Figure 14: Edit Label

Note: You may access the “Management of labels” section by clicking on the Cancel button. In this case the system does not save the changes.

7.1.13 List of Languages

The List of Languages shows a table with all languages. The columns of the table represent language name, language code, activity status of the language and all the available action icons respectively. If the action icon is greyed, you cannot use this functionality.

1. To view the List of Languages select Administration → General data → Languages option from the left menu

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Management of languages

Please select column: to filter by input:

List of languages

Number of items per page: Page 1 from 1

<input type="checkbox"/>	Language name	Language code	Active	Actions
<input type="checkbox"/>	English	en	✓	 
<input type="checkbox"/>	Français	fr	✓	 

<< Back

Figure 15: List of Languages

Note: You may access the “Administration” section by clicking the [<< Back](#) link

7.1.14 Create new Language

- To create a new language, select Administration → General data → Languages option from the left menu
- Click on the **CREATE NEW LANGUAGE** button
- Provide the following:
 - “Language name” (mandatory): It is the name of the language
 - “Language code” (mandatory and unique): It is the abbreviation of a language’s name
 - “Active”: Check the checkbox “Yes” if the language should be active. If the language is active, You will be able to select it from the drop down list of the top right menu
- Click on the **SAVE** button to save the language
- The new language is created

Create new language

Language name:*


Language code:*

Active: ☐ Yes

Figure 16: Create New Language

Note: You may access the “Management of languages” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not create a new language

7.1.15 Edit Language

- To edit a language, select Administration → General data → Languages option from the left menu
- Click on the “Edit” icon  of an entry
- The details of the selected language are displayed

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4. Edit “Language name” and/or “Language code” and/or check/uncheck “Active” checkbox
5. Click on the **SAVE** button to apply the changes

Edit language

Language name:*

Language code:*

Active: ☒ Yes

[Save](#) [Cancel](#)

Figure 17: Edit Language

Note1: The default language is English and it cannot be edited

Note2: You may access the “Management of languages” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

7.1.16 Delete Language

1. To delete one or more languages, select the desired one(s) from the languages list and click on the **DELETE** button
2. Alternatively, click on “Delete” icon of an entry

Note1: When you delete the language, all labels, help items and initial messages associated with that language will be deleted

Note2: The default language is English and it cannot be deleted

Note3: The language cannot be deleted if it is active

Note4: You may access the “Administration” section by clicking the [<< Back](#) link

7.2 *Management of users*

The sub-functionalities of this section are:

- List of Users
- Create new User
- Edit User

7.2.1 List of Users

The List of users shows a table with all users. The columns of the table represent the institution the user belongs to, name and surname, user ID, activity status of the user, assigned roles and all the available action icons respectively.

1. To view the List of Users select Administration → Users option from the left menu

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Management of users

Please select column: to filter by input:

List of users

Number of items per page: Page 1 from 2

Institution	Name	Surname	User ID	Active	Role	Actions
ED.A.002	Administrator	User	admin	✓	Admin	
			user1	✓	Admin	
ED.TEST.001	Test User	1	testuser1	✓	Consultation User	
ED.TEST.001	Test User	2	testuser2	✓	Author	
			testuser3	✓	Service Manager	

[<< Back](#)

Figure 18: List of Users

Note: You may access the “Administration” section by clicking the [<< Back](#) link

7.2.2 Create new User

- To create a new user select Administration → General data → Users option from the left menu
- Click on the **CREATE NEW USER** button
- Provide the following:
 - “User ID” (mandatory and unique): This is the username. e.g. ‘Admin’.
 - “Active”: Select from the drop down list if the user is active or inactive. If inactive the user can’t access any of the application functionality
 - “Role”: Roles for the user. This is the set of rights associated to the user e.g. ‘Author’, ‘Consultant user’ etc. Click the to add or remove role to/from the user.
- Click on the **SAVE** button to save the user
- The new user is created and the system shows the message that the details of the new user will be available after its first login

Create new user

User ID:

Active:

Role:

[<< Back](#)




Figure 19: Create New User

Note1: User ID must match the ID registered in ECAS

Note2: You may access the “Management of users” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not create a new user

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7.2.3 Edit User

1. To edit a user select Administration → General data → Users option from the left menu
2. Click on the “Edit” icon  of an entry
3. Click the   to add or remove role for the user
4. Click on the **SAVE** button to apply the changes

Edit user

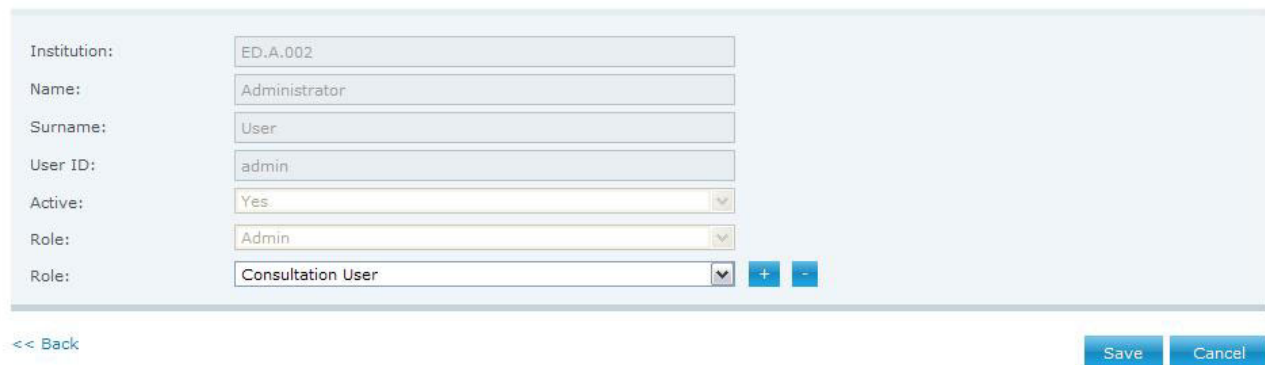


Figure 20: Edit User

Note: You may access the “Management of users” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

7.3 Management of roles

The sub-functionalities of this section are:

- List of Roles
- Create new Role
- Edit Role
- Delete Role

7.3.1 List of Roles

The List of Roles shows a table with all the available roles. The columns of the table represent role name, activity status of the role, assigned rights and all the available action icons respectively.

1. To view the List of Roles select Administration → Roles option from the left menu

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Management of roles

Please select column: to filter by input:

List of roles

Number of items per page: Page 1 from 1

<input type="checkbox"/>	Role name	Active	Rights	Actions
<input type="checkbox"/>	Author	<input checked="" type="checkbox"/>	View forecast item (View list, preview) Write forecast (Create/Edit forecast) Reactivate forecast Cancel forecast Delete draft request View item (View list, preview request, view history, view versions) Write item (Create/Edit/Submit request, Create new version) Reactivate request Cancel draft request Delete forecast	<input type="button" value="edit"/> <input type="button" value="delete"/>

<< Back

Figure 21: List of Roles

Note: You may access the “Administration” section by clicking the << Back link

7.3.2 Create new Role

- To create a new role select Administration → General data → Roles option from the left menu
- Click on the **CREATE NEW ROLE** button
- Provide the following:
 - “Role name” (mandatory and unique): It is the name of the role. e.g. ‘Admin’, ‘Author’ etc.
 - “Rights” (mandatory): Specific operations that the user can perform according to the role that will be assigned. Click the to add or remove rights to/from the role.
 - “Active”: Select from the drop down list if the role is active or inactive. If inactive the role cannot be assigned to the user.
- Click on the **SAVE** button to save the role
- The new role is created

Create new role

Role name: *

Rights: *

Active:




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Figure 22: Create New Role

Note: You may access the “Management of roles” section by clicking the << Back link or by clicking on the Cancel button. In these cases the system does not create a new role

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7.3.3 Edit Role

1. To edit a role select Administration → General data → Roles option from the left menu
2. Click on the “Edit” icon  of an entry
3. Edit “Role name” and/or click the   to add or remove rights to/from the role and/or select from the drop down list if the role is active or not.
4. Click on the **SAVE** button to apply the changes

Edit role

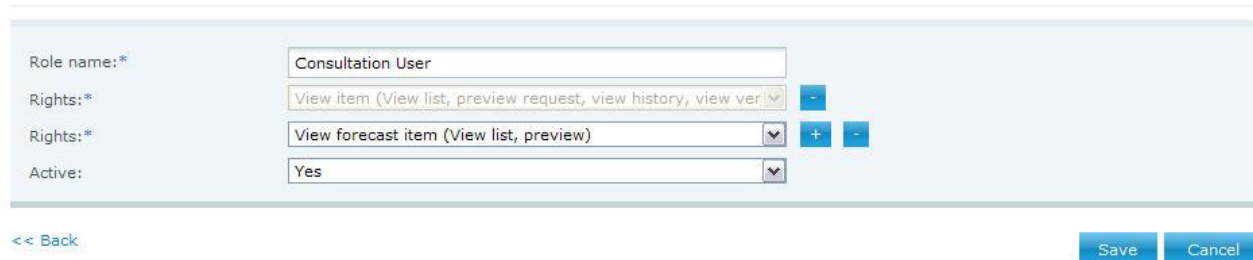



Figure 23: Edit Role

Note: You may access the “Management of roles” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

7.3.4 Delete Role

1. To delete one or more roles, select the desired one(s) from the roles list and click on the **DELETE** button
2. Alternatively, click on “Delete” icon  of an entry

Note1: The role cannot be deleted if it is active

Note2: You may access the “Administration” section by clicking the [<< Back](#) link

7.4 Management of services

The sub-functionalities of this section are:

- List of Services
- Create new Service
- Edit Service

7.4.1 List of Services

The List of Services shows a table with all the available services. The columns of the table represent name, parent (name of the “parent” service to which this service belongs to), activity status of the service, modules (list of modules associated with the service) and Edit action icon respectively.

1. To view the List of Services select Administration → Services option from the left menu

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Management of services

Please select column: to filter by input:

* Reordering is available only when a Parent filter is selected and all results are shown in the page.

List of services

Number of items per page: 3 item(s) found, displaying 1 to 3.

Name	Parent	Active	Modules	Actions
Product(s) data and budget estimation		✓	Project data Product(s) data Budget estimation	
Distribution and reprints	Product(s) data and budget estimation	✓	Project data Distribution Reprints	
Printing and Manuscript	Product(s) data and budget estimation	✓	Project data Manuscript Print and finishing	

<< Back

Figure 24: List of Services

You may click on the buttons to reorder the services that are shown in the Create request section. Reordering is possible only if “Parent” is selected from the filter column drop down list, “All” is not selected for filter input and “All” is selected for paging. If you want to reorder the main services, for filter input choose the option “None”. If you want to reorder sub services of some service, for filter input choose the option with the name of that main service. You may click on the **Save** button to apply the changes.

Management of services

Please select column: to filter by input:

* Reordering is available only when a Parent filter is selected and all results are shown in the page.

List of services

Number of items per page: 2 item(s) found, displaying 1 to 2.

Name	Parent	Active	Modules	Actions
Distribution and reprints	Product(s) data and budget estimation	✓	Project data Distribution Reprints	
Printing and Manuscript	Product(s) data and budget estimation	✓	Project data Manuscript Print and finishing	

<< Back



Figure 25- Management of Services-Reordering

Note: You may access the “Administration” section by clicking the Back link

7.4.2 Create new Service

1. To create a new service, select Administration → Services option from the left menu
2. Click on the **CREATE NEW SERVICE** button
3. Provide the following:
 - a. “Service name” (mandatory): It is the name of the service and exists for all active languages.

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- b. “Service code” (mandatory): It is the code of the service. This service code will be written in the exported Request data during the submission to the Planpubli system
- c. “Parent selection”: Drop down list with all the available services and none option if service doesn’t have parent
- d. “Tool tip”: It is the tool tip of the service
- e. “Enable tool tip”: Check this checkbox if the tool tip should be enabled
- f. “Modules selection” (mandatory): Combo box with all the available modules. Click the   to add or remove module
- g. “Active”: Select from the drop down list if the service is active or inactive
4. Click on the **SAVE** button to save the service
5. The new service is created

Create new service

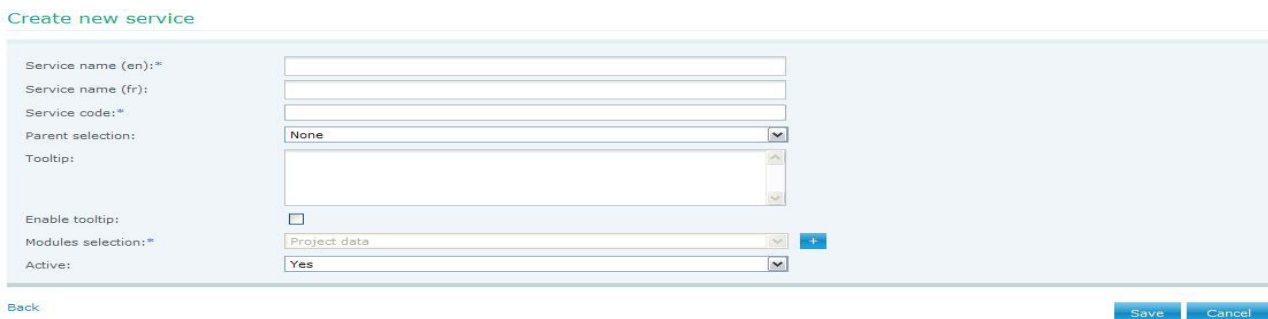





Figure 26: Create New Service

Note: You may access the “Management of services” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not create a new service

7.4.3 Edit Service

1. To edit a service. select Administration → Services option from the left menu
2. Click on the “Edit” icon  of an entry
3. Edit “Service name” and/or ”Service code” and/or select from the drop down list “Parent” service and/or edit “Tool tip” and/or check/uncheck “Enable tool tip” and/or click the   to add or remove a module to/from the service and/or select from the drop down list if the service is active or not
4. Click on the **Save** button to apply the changes

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Edit service

Figure 27: Edit Service

Note: You may access the “Management of services” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

7.5 Management of modules

The sub-functionalities of this section are:

- Edit Module
- Management of fields

7.5.1 Edit Module

1. To edit a module. select Administration → Module → Manage module option from the left menu
2. You may click on the **ENABLE** or **DISABLE** button to activate/deactivate selected modules
3. You may click on the buttons to reorder modules. This order will be present in the forecasts
4. Click on the **Save** button to apply the changes

Manage modules

Name	Active	Actions
Project data	✓	
Product(s) data	✓	
Budget estimation	✓	
Audience and themes	✓	
Manuscript	✓	
Copyright and reproduction	✓	
Print and finishing	✓	
Distribution	✓	
Reprints	✓	

<< Back

Save

Figure 28: Edit Modules



Note: You may access the “Administration” section by clicking the [<< Back](#) link. In this case the system does not save the changes

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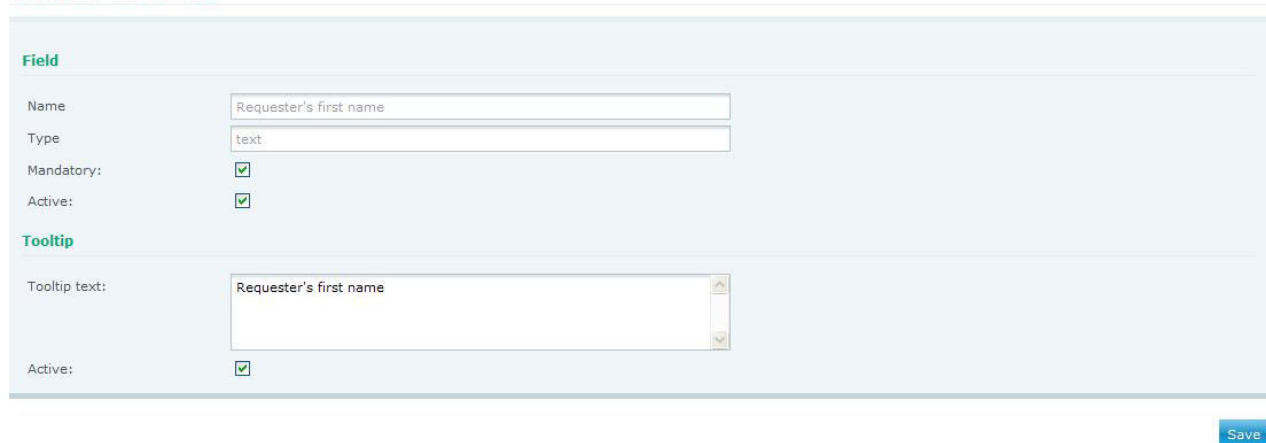
7.5.2 Management of fields

The sub-functionalities of this section are:

- Edit Field
- Create new Value

The system supports two types of fields (simple and complex). For simple types of fields you may only set the field to be mandatory or not, set the field to be active or not and edit the tool tip. In complex types of fields you may add new value of field, set the field to be mandatory or not, set the field to be active or not, edit the tool tip, activate or deactivate existing values (click **ENABLE** or **DISABLE** buttons) or reorder the existing values (click on   buttons). The pictures below show both types of fields.

Management of fields



The screenshot displays the 'Management of fields' interface. It features a 'Field' section with the following elements:

- Name:** A text input field containing 'Requester's first name'.
- Type:** A dropdown menu showing 'text'.
- Mandatory:** A checkbox that is checked.
- Active:** A checkbox that is checked.

Below the 'Field' section is the 'Tooltip' section, which includes:

- Tooltip text:** A text area containing 'Requester's first name'.
- Active:** A checkbox that is checked.

A blue 'Save' button is located at the bottom right of the interface.

Figure 29: Simple Type of Filed

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Management of fields

Field

Name:

Type:

Mandatory: ☒

Active: ☒

Tooltip

Tooltip text:

Active: ☒

List of values

Name	Code	Active	Parent field	Parent value	Actions
Prêt à imprimer	1	<input checked="" type="checkbox"/>			Disable Edit
A traiter	2	<input checked="" type="checkbox"/>			Disable Edit
Autres	3	<input checked="" type="checkbox"/>			Disable Edit

Add new value Save

Figure 30: Complex Type of Field

7.5.2.1 Edit Field

- To edit a field, select Administration → Module → Manage module option from the left menu
- From the left menu you select some module and field to edit
- You may set the field to be mandatory or not, set the field to be active or not, edit “Tool tip text”, and set tool tip to be active or not. If the field is complex you may activate or deactivate existing values (click **ENABLE** or **DISABLE** buttons) or reorder the existing values (click on buttons)
 - You may edit the selected value by clicking on the **EDIT** button in the Actions column
 - The Edit value page will be displayed
 - Edit “Name” for all available languages and/or “Code” and/or “Parent DG” and/or select from the drop down list parent field and parent value if necessary and/or check/uncheck “Active” checkbox
 - Click on the **SAVE** button to apply the changes for the value or click on the **Cancel** button to access the “Management of fields” section. If you click on the Cancel button the system does not save the changes
 - You may edit other values
- Click on the **SAVE** button to apply the changes for field

Note1: Parent DG associates this field value with some specific DG. The value will be displayed in forecasts and requests only if the user belongs to that DG

Note2: If one or more values are already connected to a field then the new value must have the same parent field

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Note3: You may access the “Management of fields” section by clicking on the Cancel button. In this case the system does not save the changes

7.5.2.2 Create new Value

1. To create a new value select Administration → Module → Manage module option from the left menu. You may add new value of fields only for complex type of fields (as we mentioned above)
2. Click on the **CREATE NEW VALUE** button
3. Provide the following:
 - a. “Name”: It is the name of the value and exists for all languages
 - b. “Code” (mandatory): It is the code of the value
 - c. “Parent DG”: It associates this field value with some specific DG. Value will be displayed in forecasts and requests only if user belongs to that DG
 - d. “Parent field” : Select from the drop down list parent field if necessary
 - e. “Parent value” : Select from the drop down list parent value if necessary
 - f. “Active”: Check the checkbox if the value should be active
4. Click on **SAVE** button to save the value
5. The new value is created

Create new value

Figure 31: Management of Fields-Create New Value

Note1: For the parent field the following conditions are applicable:

- Only fields from the same module can be selected
- If one or more values are already connected to a field then the new value must have the same parent field

Note2: You may access the “Management of fields” section by clicking on the Cancel button. In this case the system does not save a new value

Note3: In case of values belonging to the Linguistic Versions field, the following rules apply:

- When specifying multi-lingual values, the languages list must be separated by comma character
- Single-lingual values must not contain comma characters
- All multi-lingual value names (en, fr...) must have the same number of languages

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- Multi-lingual values will automatically have their code prepended with an X character (e.g. “X3A”)

8 Assistance

- Access the “Assistance” from the top menu

ASSISTANCE | FORECASTS | REQUESTS | STATISTICS | SEARCH | CONTACTS | ADMINISTRATION

- On this page you may find general text for assistance and helpdesk phone number

9 Forecasts

9.1 View list of forecasts

- Access the “Forecasts” from the top menu

ASSISTANCE | **FORECASTS** | REQUESTS | STATISTICS | SEARCH | CONTACTS | ADMINISTRATION

- Select “List of forecasts” option from the left menu

The List of forecasts shows a table with all the available forecasts. The columns of the table represent notice ID, forecast title, creator user id, DG the forecast belongs to, creation date, status of the forecast as icon and all the available action icons respectively. If the action icon is greyed, this functionality cannot be used.

List forecasts

Please select column: to filter by input:

List of forecasts

Number of items per page: Page 1 from 1

<input type="checkbox"/>	Notice ID	Forecast title	Creator User ID	DG	Creation Date	Status	Actions
<input type="checkbox"/>	2010.0001	First Forecast	testuser2	ED.TEST.001	03/11/2010		
<input type="checkbox"/>	2010.0033	Tes 09 Octobre	admin	ED.A.002	09/11/2010		

<< Back ☐ PDF ☐ XML ☐ XLS

Figure 32: List of forecasts

Note1: You may view the details of a forecast by clicking the link of the “Forecast title” or by clicking the “Preview” icon in Actions column

Note2: You may access the “Forecasts” section by clicking the << Back link.

Note3: You may export the results by selecting one or more desired formats and clicking the Export button

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If you have certain rights, he/she may change the DG the forecast belongs to

1. Click on the link of the “DG” for selected forecast
2. Edit DG page will be displayed
3. Select from the drop down list the new DG
4. Click on the **SAVE** button to apply the changes

Edit DG

Figure 33: Edit DG

Note: You may access the “List of Forecasts” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

9.2 Create draft forecast

1. To create a new draft forecast, select Forecasts → Create new forecast option from the left menu. If you are on the “List of forecast” page click on the **CREATE NEW FORECAST** button
2. For the Project data module, you have to provide data for all the mandatory and optionally for fields required to lunch a request
3. You may click on the **COPY** button to copy the Requester info into Project Owner and Destinator fields
4. Click on the **SAVE** button to save the forecast in the draft status and the page will be reloaded. You will be able to edit the forecast or click on the **SAVE AND RETURN TO MAIN MENU** button to save the forecast in the draft status and be redirected to “Forecasts” main page
5. The new forecast is crated in draft status

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Create forecast - Project data



Requester's first name	<input type="text" value="Administrator"/>	
Requester's last name	<input type="text" value="User"/>	
Requester's E-mail	<input type="text" value="admin@eurodyn.com"/>	
	<input type="button" value="Copy"/>	
Project owner's first name	<input type="text"/>	- Required to launch a request
Project owner's last name	<input type="text"/>	- Required to launch a request
Project owner's E-mail	<input type="text"/>	- Required to launch a request
Order And Invoice Destinator's first name	<input type="text"/>	- Required to launch a request
Order And Invoice Destinator's last name	<input type="text"/>	- Required to launch a request
Order And Invoice Destinator's E-mail	<input type="text"/>	- Required to launch a request
Project title	<input type="text"/>	- Mandatory
Comments on Project data	<div><div></div></div>	
Attachment	<input type="text"/> <input type="button" value="Browse..."/>	

<< Back to list of Forecasts

Figure 34: Create Draft Forecast

Note1: You may view the help of Project data module by clicking the icon

Note2: After the forecast is saved by clicking on the Save button. You may access and edit this and other modules via the left menu

Note3: You may access the “List of Forecasts” section by clicking the << Back link. In this case the system does not create a new forecast


9.3 Edit draft forecast

1. If you click on the **SAVE** button after creating new draft forecast, the system will redirect to the edit forecast functionality. In other cases, go to Forecast → List of forecast → Forecast preview for the selected forecast, and click on “Edit” icon for some module.
2. From the left menu select modules and fill in/edit any desired fields
3. Click on the **SAVE** button to apply the changes and the page will be reloaded. You will be able to edit other modules or click on the **SAVE AND RETURN TO MAIN MENU** button to apply the changes and be redirected to the “Forecasts” main page

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Figure 35: Edit Draft Forecast

Note1: If a value used by a draft forecast is disabled, a message will inform you that some values are no longer available and that some fields will be empty. If these fields are mandatory you will have to select a different value.

Note2: You may view the help for each module by clicking the  icon

Note3: You may access the “List of Forecasts” section by clicking the [<< Back](#) link. In this case the system does not save the changes


9.4 Cancel draft forecast

1. To cancel one or more draft forecasts, select the desired one(s) from the forecasts list and click on the **CANCEL** button
2. Alternatively, click on “Cancel” icon  of an entry
3. If you are on the Forecast preview page, click on the **CANCEL** button to cancel the forecast

Note1: You may cancel forecasts only with status “draft”

Note2: You may access the “Forecasts” section by clicking the [<< Back](#) link


9.5 Reactivate forecast

1. To reactivate one or more forecasts, select the desired one(s) from the forecasts list and click on the **REACTIVATE** button
2. Alternatively, click on “Reactivate” icon  of an entry
3. If you are on the Forecast preview page, click on the **REACTIVATE** button to reactivate the forecast

Note1: You may reactivate forecasts only with status “cancel”

Note2: You may access the “Forecasts” section by clicking the [<< Back](#) link

9.6 Delete draft forecast

1. To delete one or more forecasts, select the desired one(s) from the forecasts list and click on the **DELETE** button
2. Alternatively, click on “Delete” icon  of an entry

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- If you are on the Forecast preview page, click on the **DELETE** button to delete the forecast

Note1: You may delete forecasts only with status “draft”

Note2: You may access the “Forecasts” section by clicking the [<< Back](#) link

10 Requests

10.1 View list of requests

- Access the “Requests” from the top menu

ASSISTANCE | FORECASTS | REQUESTS | STATISTICS | SEARCH | CONTACTS | ADMINISTRATION

- Select “List of requests” option from the left menu

The List of requests shows a table with all the available requests. The columns of the table represent notice ID, title of the request, creator user id, institution/DG the request belongs to, creation date, status of the forecast as icon and all the available action icons respectively. If the action icon is greyed, you cannot use this functionality.

List requests

Please select column: to filter by input: [Filter](#)

List of requests

Number of items per page: [OK](#) Page 1 from 8

<input type="checkbox"/>	Notice ID	Title of the request	Creator userid	Institution/DG	Creation Date	Status	Actions
<input type="checkbox"/>	2010.0001	First Forecast v2	testuser2	ED.TEST.001	03/11/2010		
<input type="checkbox"/>	2010.0002	Test C>L1	admin	ED.A.002	04/11/2010		
<input type="checkbox"/>	2010.0003	Test CL1	admin	ED.A.002	04/11/2010		
<input type="checkbox"/>	2010.0004	test cl2	admin	ED.A.002	04/11/2010		
<input type="checkbox"/>	2010.0005	raqdhaqdh	admin	ED.A.002	04/11/2010		

[<< Back](#) [Export](#) ☐ PDF ☐ XML ☐ XLS [Cancel](#) [Delete](#) [Reactivate](#)

Figure 36: List of Requests

Note1: You may view the details of a request by clicking the link of the “Title of the request” or by clicking the “Preview” icon in Actions column

Note2: If the request is created based on the forecast, you may click on the link of the “Notice ID” to see the forecast preview

Note3: You may access the “Requests” section by clicking the [<< Back](#) link

Note4: You may export the results by selecting one or more desired formats and clicking the Export button

[Export](#) ☐ PDF ☐ XML ☐ XLS

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If you have certain rights, he/she may change the DG the request belongs to

1. Click on the link of the “DG” for selected request
2. Edit DG page will be displayed
3. Select from the drop down list new DG
4. Click on the **SAVE** button to apply the changes

Note: You may access the “List of Requests” section by clicking the [<< Back](#) link or by clicking on the Cancel button. In these cases the system does not save the changes

10.2 Create request

There are two options for creating request. The first option is create a request from scratch

1. Select Requests → Create new request option from the left menu
2. Fill in at least the mandatory fields and selects the desired services
3. You may click on the **COPY** button to copy the Requester info into Project Owner and Destinator fields
4. You should select desired services. If you select a main service all the sub services will be selected automatically ☒. If you want to disable some sub services, click on the name or the icon next to the name. The icon of the main service will be semi checked ☐, to show that all sub services are not selected
5. Click on the **SAVE** button to save the request in draft status and the page will be reloaded. You will be able to edit the request or click on the **SAVE AND RETURN TO MAIN MENU** button to save the request in the draft status and be redirected to the “Request” main page
6. The new request is created in draft status

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Create request - Project data



Requester's first name:

Requester's last name:

Requester's E-mail:

[Copy](#)

Project owner's first name: - Required to submit the request

Project owner's last name: - Required to submit the request

Project owner's E-mail: - Required to submit the request

Order And Invoice Destinator's first name: - Required to submit the request

Order And Invoice Destinator's last name: - Required to submit the request

Order And Invoice Destinator's E-mail: - Required to submit the request

Project title: - Mandatory field

Comments on Project data:

Attachment: [Browse...](#)

Services

I ask OP to provide the following services:

☐ Product(s) data and budget estimation

☐ Distribution and reprints

☐ Printing and Manuscript

[<< Back to list of Requests](#) [Save](#) [Save and return to main menu](#)

Figure 37: Create request

Note1: You may view the help of Project data module by clicking the icon

Note2: After the request is saved by clicking on the Save button you may access and edit this and other services via the left menu

Note3: If you did not select at least one service and want to save the request a warning message will be shown

Note4: You may access the “List of requests” section by clicking the [<< Back](#) link. In this case the system does not create a new request.

The second option is create a request based on forecast.


1. Select Requests → Create request based on forecast option the from left menu
2. The system redirects to the “FORECASTS” section in the “List of forecasts” page
3. You may find forecast with status “draft” from which he/she wants to create request
4. Click on “Forecast title” link or “Preview” icon in Actions column for that forecast
5. Click on the **LAUNCH REQUEST** button
6. The new request is created in draft status

Note1: You must fill all fields required to launch a request

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Note2: You may access the “List of forecast” section by clicking the [<< Back](#) link. In this case the system does not create a new request.

10.3 Edit draft request

1. If you click on the **SAVE** button after creating new draft request, the system will redirect to the edit request functionality. In other cases, go to Requests → List of requests → Request preview for the selected request, and click on “Edit” icon  for some service
2. From the left menu select services and fill in/edit any desired fields
3. Click on the **SAVE** button to apply the changes and the page will be reloaded. You will be able to edit other services or click on the **SAVE AND RETURN TO MAIN MENU** button to apply the changes and be redirected to the “Requests” main page

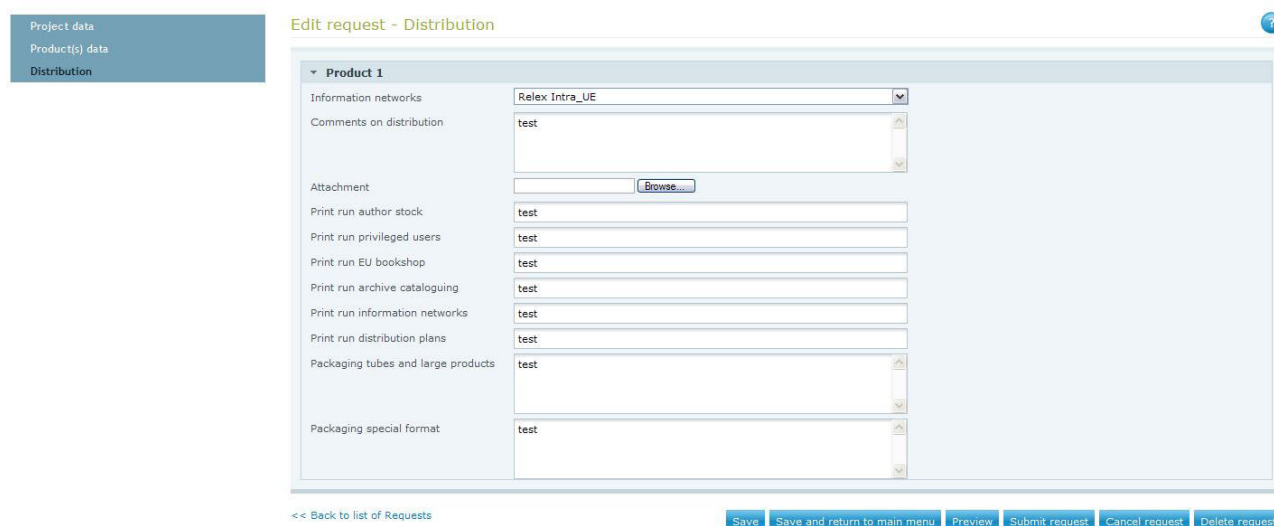




Figure 38: Edit Request

Note1: If a value used by a draft request is disabled, a message will inform you that some values are no longer available and that some fields will be empty. If these fields are mandatory you will have to select a different value

Note2: You may view the help for each service by clicking the  icon

Note3: You may access the “List of Request” section by clicking the [<< Back](#) link. In this case the system does not save the changes

10.4 Cancel draft request


1. To cancel one or more draft requests, select the desired one(s) from the requests list and click on the **CANCEL** button
2. Alternatively, click on the “Cancel” icon  of an entry
3. If you are on the Request preview page, click on the **CANCEL** button to cancel the request

Note1: You may cancel requests only with status “draft”

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Note2: You may access the “Requests” section by clicking the [<< Back](#) link


10.5 Reactivate request

1. To reactivate one or more requests, select the desired one(s) from the requests list and click on the **REACTIVATE** button
2. Alternatively, click on the “Reactivate” icon  of an entry
3. If you are on the Request preview page, click on the **REACTIVATE** button to reactivate the request

Note1: You may reactivate requests only with status “cancel”

Note2: You may access the “Requests” section by clicking the [<< Back](#) link

10.6 Delete draft request

1. To delete one or more requests, select the desired one(s) from the requests list and click on the **DELETE** button
2. Alternatively, click on the “Delete” icon  of an entry
3. If you are on the Request preview page, click on the **DELETE** button to delete the request

Note1: You may delete requests only with status “draft”

Note2: You may access the “Requests” section by clicking the [<< Back](#) link

10.7 Submit request

1. To submit request, go to Requests → List of requests → Request preview for the selected request
2. You must fill all fields required to submit a request
3. Click on the **SUBMIT REQUEST** button
4. The request will be submitted

Note1: You may submit request only with status “draft”

Note2: If a value used by a draft request is disabled, a message will inform you that some values are no longer available and that some fields will be empty. If these fields are mandatory you will have to select a different value


Note3: If there are errors (required fields that are empty) an error message will be shown

Note4: You may access the “List of requests” section by clicking the [<< Back](#) link

10.8 Edit submitted request

1. When you submit a request, the system will redirect to the preview request functionality. In other cases, go to Requests → List of requests → Request preview for the selected request
2. Click on the **CREATE NEW VERSION** button

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3. The system will make new version of the selected request with status “draft” and the page will be reloaded
4. You may edit the submitted request by clicking on the “Edit” icon  for all the available services or add/remove services by clicking on the **ADD/REMOVE SERVICES** button

Note1: You may edit submitted requests only with status “submitted”

Note2: You may access the “List of requests” section by clicking the [<< Back](#) link

10.9 Versioning

In order to be able to use this functionality, the selected request must have at least two versions and the last version must have status “submitted”

1. Go to Requests → List of requests and click on “Versioning” icon  for the selected request. Also, go to Requests → List of requests → Preview request for selected request and click on the **VERSIONING** button
2. You should select exactly two versions to compare
3. Click on “Compare” button
4. The system will display a page with two selected versions arranged side by side

Compare requests

☒ User Manual | ☐ User Manual New version


Project data	Project data
Requester's first name: Administrator	Requester's first name: Administrator1
Requester's last name: User	Requester's last name: User1
Requester's E-mail: admin@eurodyn.com	Requester's E-mail: admin1@eurodyn.com
Project owner's first name: Administrator	Project owner's first name: Administrator1
Project owner's last name: User	Project owner's last name: User1
Project owner's E-mail: admin@eurodyn.com	Project owner's E-mail: admin1@eurodyn.com
Order And Invoice Destinator's first name: Administrator	Order And Invoice Destinator's first name: Administrator1
Order And Invoice Destinator's last name: User	Order And Invoice Destinator's last name: User1
Order And Invoice Destinator's E-mail: admin@eurodyn.com	Order And Invoice Destinator's E-mail: admin1@eurodyn.com
Project title: User Manual	Project title: User Manual New version
Comments on Project data:	Comments on Project data:
Attachment:	Attachment:

Product

[<< Back to list of Requests](#)

Figure 39: Versioning

Note1: On the “List of request” page you may view only the last version of request

Note2: On the “List of request” page you may click on “See original” icon  to see the original version of the selected request. Also, go to Requests → List of requests → Request preview for the selected request and click on the **SEE ORIGINAL** button. To use this functionality, the selected request must have at least two versions and the last version must have status “draft”

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Note3: You may access the “List of requests” section by clicking the [<< Back](#) link

END OF DOCUMENT