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# **Web UI**

***Release 15.3.0.6***

**CONTACT Software**

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# CHAPTER 1

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## Introduction

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The Web UI provides a web-based access to selected applications. This means that you can view your PLM data on any device with an Internet browser. You do not need any additional software installation to maintain documents or articles from any location.

The Web UI combines proven and new features in a modern, attractive design. During the development process, special emphasis was placed on intuitive operation, fast navigation and high flexibility in order to offer you an improved user experience. The uniform design and navigation concept allows you to reach your destination in just a few steps.

This user manual gives you an overview about the login and navigation in the system version 15.2. Furthermore, it provides basic information about the structure of the user interface and individual user settings.

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**Note:** The Web UI does not have the complete functionality of the PC client in the current release.

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## CHAPTER 2

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### Login

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The login to the Web UI is done via an Internet address (URL) provided by your administrator. A valid user account consisting of a username and password is required for the registration. If you do not have an user account, please contact your administrator. There is no way to log in as a guest or anonymous user. This chapter describes the system login procedure in a step-by-step guide.

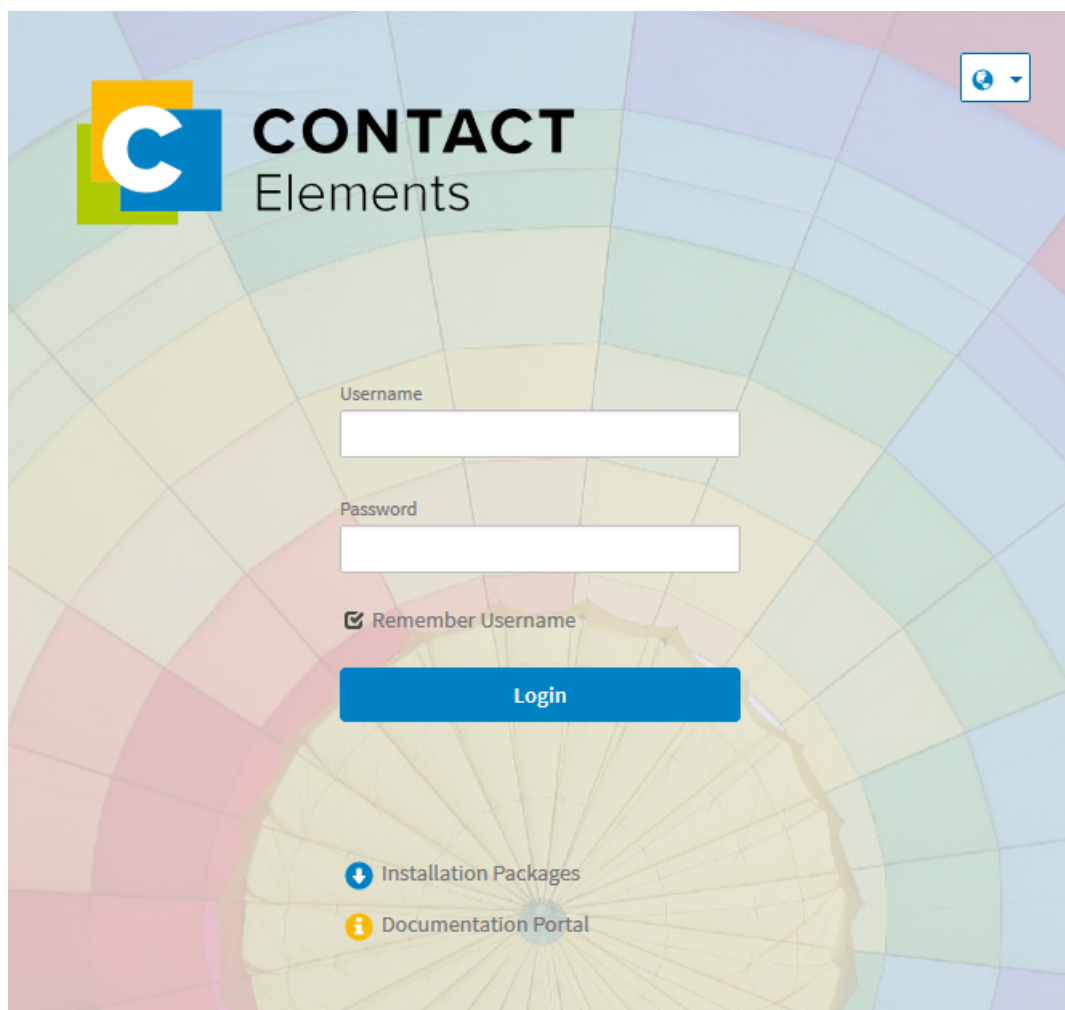
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**Note:** Via the *Globe* icon in the top right-hand corner of the login dialog you can set your system language. In the lower part of the login dialog you can download installation packages or open the documentation portal.

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1. **Open the URL of the Web UI in your Internet browser.** The login dialog opens (see screenshot).
2. Enter your username and password in the input fields.
3. Click the checkbox in front of *Remember username* if you want to save it for future logins.
4. **Click on *Login* to log in to the system.** The homepage opens.

If you are using single sign-on (SSO) authentication, you will skip the login dialog. When opening the URL, you will go directly to the homepage without entering your user data. Keep the *Shift*-key pressed while starting the program in order to prevent a configured automatic login.



The login page features a background map with colorful, semi-transparent polygonal overlays in shades of blue, green, yellow, and red. In the top left corner is the CONTACT Elements logo, consisting of a stylized 'C' in a blue square with yellow and green accents, followed by the text 'CONTACT Elements'. In the top right corner is a small globe icon with a dropdown arrow. The login form is centered and includes a 'Username' label above a white input field, a 'Password' label above another white input field, and a checkbox labeled 'Remember Username' which is checked. Below the form is a blue 'Login' button. At the bottom, there are two links: 'Installation Packages' with a blue download icon and 'Documentation Portal' with an orange information icon.

**CONTACT**  
Elements

Username

Password

☒ Remember Username

Login

Installation Packages

Documentation Portal

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### Structure and Navigation

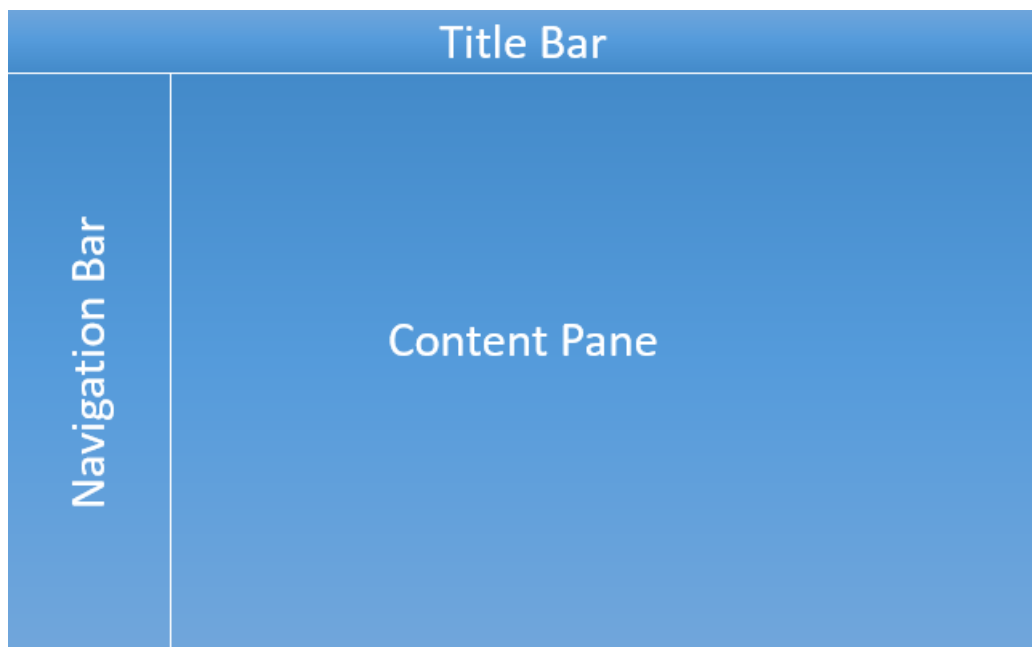
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This chapter describes the structure of the user interface and the individual functions of the control elements in the Web UI. After logging in, the homepage will open from which you can access all operations of the system. The user interface is basically divided into three areas: title bar, navigation bar and content pane.

The **title bar** is placed at the top of the user interface. The product name is located in the left area of the title bar. With a click on the product name you will be redirected from any application to the homepage. The global functions are located in the right area of the title bar. These functions can be accessed via the respective icons which are described in the chapter *Global functions in the title bar* (page 6).

The **navigation bar** is located on the left of the content pane. Here you can access the applications of your respective work context, such as documents, projects or tasks. The symbol descriptions in the navigation bar can be expanded or collapsed. The collapsed view is particularly suitable for smaller screens or limited space on the screen. The individual applications are described in chapter *Applications in the navigation bar* (page 6).

The **content pane** shows you the contents of the class or object pages, such as the result list for your search. The class page opens when you click an application. The split layout with search and tabular overview of search results is standardized across all class pages. There is no standardized layout for application pages like the dashboard or tasks. As soon as you select an object, it opens in the object page. On the object page you will find detailed information about the selected object. For example, you can view attributes, tasks and activities for the object. The following graphic shows the order of the mentioned areas.



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## Global Functions in the Title Bar

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### 4.1 Enterprise Search

By clicking the *loupe* icon, you call up the *Enterprise Search*. This functionality is an additional feature of the system which must be activated by your administrator. The search field consists of an input field as well as a button for sending and canceling a search. Enterprise Search enables you to perform a system-wide full-text search. While entering keywords, search suggestions from the search index are automatically displayed. Via the *Cancel* icon the search is closed and the search bar is hidden again.

### 4.2 Messages

The *bell* icon notifies you about new system messages. These messages are automatically generated and inform you about certain events, such as error messages.

### 4.3 Favorites

*Favorites* allow you to remember objects without having to formulate new search queries. Simply click on an entry to open the corresponding object page. Via the *star* icon on the object page, you can set the selected object as a favorite. The filled star indicates the favorites entry. The *star* icon in the title bar allows you to recall, rename or delete saved favorites. If you have not created any favorites, no entries appear here. You can save any amount of objects as favorites.

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**Note:** The favorites in the Web UI do not match with those in the PC client.

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### 4.4 History

A click on the *clock* icon opens the history overview. The most recently used objects are displayed in a list and can be opened directly. The history is saved persistently and remains available to you after a restart. In the lower area of the history overview, you can empty the displayed history completely. It is not possible to remove individual entries.



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**Note:** The Web UI history does not match that of the PC client.

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## 4.5 System Information

Via the *info* icon you get to the system information. Here you have the possibility to open the documentation portal. You can also download existing installation packages or view already installed packages. The error log displays any system errors.

## 4.6 User Settings

The *user* icon gives you access to your personal user settings. Here you can log out of the system or change your password. You can also view and edit your personal master data (e. g. e-mail, department, function, etc.) by clicking on your name.

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## Applications in the Navigation Bar

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### 5.1 Dashboard

The dashboard provides you with a user-specific overview of various information on one page. This information is displayed in so-called widgets and can be arranged individually. The following widgets can be displayed in the dashboard:

- **Activity Stream** The current activities are displayed here.
- **Datum & Time** The current date and time are displayed here.
- **My Documents** The system displays the documents you created last.
- **Objekt Tile** Here you can display information on an individual object. This widget is not filled in the standard version and can be individually configured with the *pencil* icon.
- **Project Information** Here you can display current information on selected projects. This widget is not filled in the standard version and can be individually configured with the *pencil* icon.
- **Search Favorite** Here you can display the results for a configured search favorite. This widget is not filled in the standard version and can be individually configured with the *pencil* icon.

#### 5.1.1 Configure Dashboard

1. **Click *Dashboard* in the application toolbar.** The dashboard opens. There may already be some widgets in the content area.
2. **Click the *gear* icon to customize the column layout of the dashboard.** The window *Layout* opens with the possible display options.
3. **Select a suitable layout and confirm your selection by clicking *Layout*.** The desired layout appears and is saved for future sessions. Created widgets are not lost and will be re-arranged by the system if necessary.
4. Click in the header area of a widget and move it while holding down the left mouse button.
5. **Click the *plus* icon to place more widgets.** The window *New Element* opens.
6. **Select a widget and confirm your selection by clicking the button *New Element*.** The selected widget appears in the right-hand column of the dashboard underneath the existing widgets.

7. Click the *pencil* icon in the header of the configurable widgets (object tile, project information and search favourites) to customize them.
8. Click on the *close* icon at the top of the widget to hide placed widgets.

## 5.2 Documents

In this application you can search, view and manage documents. Any amount of files can be assigned to a document. Each document is flagged in the system as an independent object with a unique number and certain master data. The start page is divided into two sections. At the top is a full text search, in which you can also search for specific search attributes. You can create your search entry in the search area as a search favorite via *Save as...* Alternatively, you can also select a search favorite in the upper part of the search window. Below the search results are listed in a tabular overview. Here you have the possibility to search existing documents and save column settings. As soon as you have selected a document with the checkbox or by clicking the respective line, a preview of the document appears in the right area. You also have the option of carrying out an operation on the document. Clicking on the document number in the search result takes you to the object page of the selected document. Here you can find more information about the document, such as attached files, change histories or tasks.

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**Note:** The number of search results is limited by your administrator. Therefore, you should restrict your search to certain criteria or attributes.

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## 5.3 Parts

Any number of documents can be assigned to a part. Each part is flagged in the system as an independent object with a unique number and certain master data. The start page is divided into two sections. At the top is a full text search, in which you can also search for specific search attributes. You can create your search entry in the search area as a search favorite via *Save as...* Alternatively, you can also select a search favorite in the upper part of the search window. Below the search results are listed in a tabular overview. You have the possibility to search for existing articles and save column settings. Here you will find further information about the article, such as attached CAD documents, change histories or parts lists.

## 5.4 Projects

In this application you can manage and control projects. This includes the monitoring of costs, time and quality. The start page is divided into two sections. At the top is a full text search, in which you can also search for specific search attributes. You can create your search entry in the search area as a search favorite via *Save as...* Alternatively, you can also select a search favorite in the upper part of the search window. Below the search results are listed in a tabular overview. You have the possibility to browse existing projects and save column settings. Clicking on the project name in the search result takes you to the object page of the selected project. Here you can find further information about the project, such as attached documents or tasks.

## 5.5 Activities

Current discussions and system contributions are displayed here in chronological order. The respective contents depend on your subscribed channels and project memberships. Here you have the opportunity to communicate with colleagues or company-wide. You can also share objects with other people or groups. The contributions can be filtered by person and/or date or period. System contributions can be shown and hidden via the checkbox.

## 5.6 Tasks

Here you get an overview of all your current tasks and inspection points in one table. You have the possibility to edit checklists, prioritize tasks and update processing statuses and activities. You can also display the tasks of a particular person using the search field or change the layout. There are two display options (horizontal and vertical division) available. You can also use the *funnel* icon to use the filter function you are used to from the PC client.

## 5.7 Edit File

File editing in the Web UI allows you to edit files easily. In this case, a file is copied from the server to a local directory on your computer. The external application (e. g. MS Excel) is then called up automatically and the selected file is opened. This file is now checked for changes at regular intervals. The processing status is displayed in the editing window of the CONTACT File Client. To learn how to edit files in an external application, see the following step-by-step instructions.

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**Important:** To edit files in an external application (e. g. MS Excel), CONTACT File Client must be installed on your device. The installation file is located in the installation packages of the Web UI, which you can call up using the info icon in the title bar.

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1. Select a file from the file list of a document by clicking the checkbox or alternatively the table row.
2. **Click the *multi* icon on the right side of the file list header and select *Edit*.** The file opens in an external application. At the same time, the file editing window of the CONTACT File Client opens on your desktop. The status in the CONTACT File Client is set to “Unchanged”.
3. **Make your changes and save the file in the external application.** The status in the CONTACT File Client changes to “Modified”. Your changes have been registered.
4. **Right-click on the file in the CONTACT File Client.** The context menu with the possible actions opens.
5. **Click *Save* in the context menu to save your changes.** The status changes back to “Unchanged”. This status indicates that all changes have been transferred to the system. You can now exit the external application.

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**Note:** While you are editing a file, it is displayed as locked for other users. This means that it is not possible to edit files at the same time.

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## Using Web UI Components

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This chapter describes how to operate the central components by using the mouse and keyboard.

### 6.1 Tables

#### 6.1.1 Concepts for Navigation and Selection

**Selected rows:** Often you want to perform an action on a certain set of objects in a table, e.g. perform operations on CDB objects. The table allows you to select one or more rows depending on the context. Selected rows are highlighted in blue.

**Last selected row:** The last selected row affects other components. For example, a PDF preview is usually created in the overview page for documents. The files associated with the last selected document are also displayed. The last selected row also has a blue frame.

**Focused row/cell:** In order not to influence the existing selection of the table when navigating, it is possible to move the row/cell focus independently from the selection. This is indicated by a blue dotted frame (at the moment, however, for implementation reasons, still shown as a continuous frame).

#### 6.1.2 Using the Keyboard in the Table

The basic navigation within the table is possible with the keys `<ArrowUp>` and `<ArrowDown>`. If you navigate in this way, the navigated row is always the only selected row in the table. To select a row interval (provided the table supports this), the key combinations `<Shift+ArrowUp>` and `<Shift+ArrowDown>` can be used. The focus is always on the last selected row. The procedure for determining the interval here is based on the implementation in the table view of files in Windows Explorer.

The `<Enter>` key can be used to trigger a table-dependent action on the selected row. In the case of a table that displays CDB objects, the detail page of the respective object is navigated to.

Navigation without changing the selection is possible with the key combinations `<Ctrl+ArrowUp>` and `<Ctrl+ArrowDown>`. The existing selection remains, but the focus in the table is set to the next row. The focused row can now be selected or deselected e.g. with the help of `<Space>`. This also makes it possible to add rows that are not within a continuous interval.

`<Ctrl+ArrowLeft>` or `<Ctrl+ArrowRight>` sets the focus of the table to a specific cell of the focused row. This makes it possible to trigger column-specific actions on an object, e.g. navigate to the corresponding project in a document result list. With `<Escape>` the focus is set to the whole row again.

With the key `E`, the filter can be activated within a table. This allows the user to filter the contents of the table without mouse interaction by typing a string.

### 6.1.3 Additional Mouse Control

If the mouse button is clicked on the content pane of the table, the respective cell is selected and focused. If `<Ctrl>` is pressed additionally, the respective row is added/removed to the selection.

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## Personal Settings - Web UI

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The behavior of the Web UI can be influenced by the settings you made in the *Web UI* tab of the personal settings.

### 7.1 History

#### 7.1.1 *Maximum Number of Entries within the History*

The system stores objects that you have recently used. These are prominently displayed in many places, e.g. on the class page. You use this setting to specify how many objects are to remain in the history

#### 7.1.2 *Number of Objects within the History per Class*

This setting determines how many objects of the same class are stored in the history.

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## List of Figures

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## List of Tables

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