siatel

Validation cycles

Administration Tool

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What is a validation cycle?

A validation cycle is a simple **process** made to **validate a document** before its publication. A validation cycle, once started, has five stages: modification, approval, validation, publication and reading. Each stage is performed by a defined user, in defined deadlines. As soon as a stage is validated, the validation cycle moves on to the next stage.

At the validation stage, the user can decide to either validate or invalidate the document. If he invalidates it, the process goes back to the modification stage, and the validation cycle follows its normal course again.

Once that the validation stage is validated, the document is published and released.

Example

The design team of your company wishes to implement a new style guide for all of its documents. Thus, to present the new chart, the design team creates a document called "New style guide proposal", that contains various graphic templates and explanatory texts. Before being used by the members of the company, the style guide must be the target of a **validation cycle**, that will result in the final version of the guide, its validation and its diffusion.

- To start off, the **art director** starts a validation cycle from the "New style guide proposal" document.
- As soon as the validation cycle is started, the **graphic designers** can modify the document: creation of graphic templates, etc.
- Once that every graphic designer has contributed to the document, the two **project managers** of the design team give their opinion on the document (positive or negative), and add a commentary to justify their opinion.
- Now that the project managers have given their opinion, the document comes back to the **art director**. The art director reads it, and decides to validate or invalidate it.
- If the art director is content with the style guide proposal, he validates it, and it is published in the explorer, according to the settings that have been defined.
- Finally, the document is released to all the **members** of the company, so the style guide can be used in all of the documents published by the company in the future.

Creating and configuring a validation cycle

To create a validation cycle:

1. In the left pane of the Administration tool, open the branch corresponding to the GARGANTUA database of your choice.
2. Click on the **Validation cycles** sub-branch.

   The **Manage validation cycles** is displayed in the right pane.

3. At the bottom left of the right pane, click on the **New** button.

   The management screen of the new validation cycle is displayed.

4. Click on the **Apply** button.

   You have created a validation cycle, and you can now configure it.

Validation cycle management screen

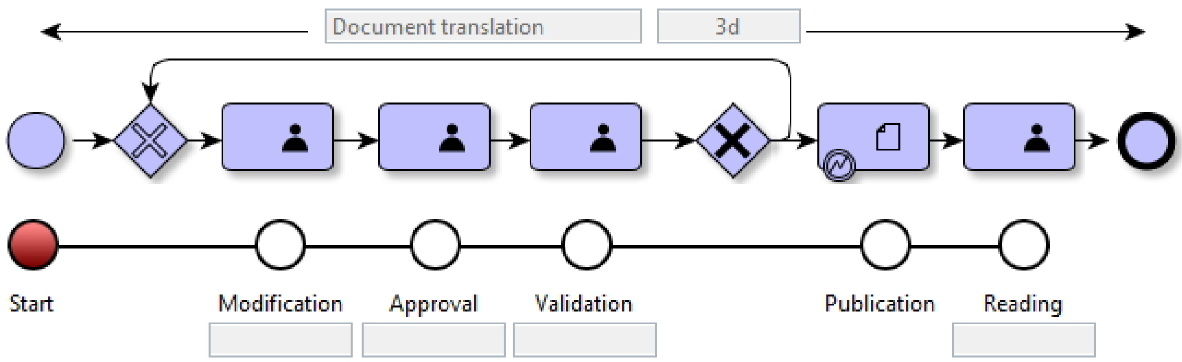
The validation cycle management screen contains the following tabs:

- The **Properties** tab allows you to configure each stage of the validation cycle (start, modification, approval, validation, publication and reading).
- The **Notifications** tab allows you to define the mails to send to the validation cycle contributors depending on the events of each stage.
- The **Summary** tab contains a recap of the validation cycle information.
- The **Log** tab allows you to check the list of all the operations performed on the validation cycle, by optionally filtering them according to various criteria.
- The **Help** tab allows you to access the contextual help.

Start stage

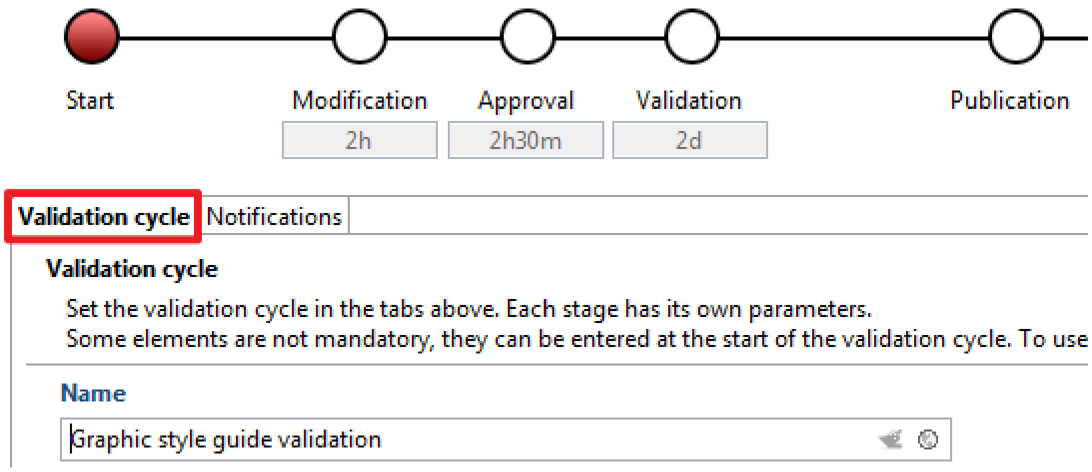
The configuration of the start stage allows you to indicate the main information of the validation cycle: name, description, manager or maximum working time.

To start a validation cycle, the actor must have the Start a validation cycle right.

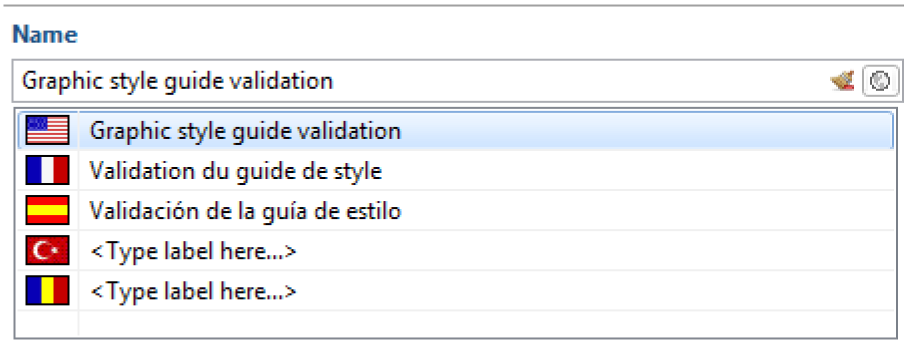


To configure the start stage:

1. Make sure that you are in the **Validation cycle** tab of the **Start** stage.



2. Fill the **Name** field.
    - You can translate the name of the validation cycle: click on the icon to display the list of all the available languages, and fill the fields with the appropriate translations. This way, foreign users can access the validation cycle in their respective language.



- You can also delete all the translations, by clicking on the icon, and then on the icon.

3. Fill, if necessary, the **Description** field.
4. Add, if necessary, the validation cycle to a package, in the **Package** field.
5. Add a validation cycle manager, in the **Validation cycle manager** field.
   The validation cycle manager can view at any time the progress of the validation cycle of the document, modify it, stop it, or even delete it, through the **Validation cycles manager** feature, available in the Web Client, by clicking on the G menu, and then on **Managers**. Refer to the "DBA Group User documentation", chapter "Validation cycles manager tab", to learn more about all the possibilities available for the manager.

   The user that you want to assign as the validation cycle manager has to be assigned to the database in which the validation cycle is located.

   There can only be one validation cycle manager. This is why you cannot assign a group or role as the validation cycle manager.

   Checking the "Use the same manager for all stages" checkbox allows you to assign the validation cycle manager to all of the validation cycle stages.

6. Add a maximum working time for the cycle, in the **Maximum working time** field.

   If the validation of the document is not completed in the allowed deadline, the document is filed in the expired documents.

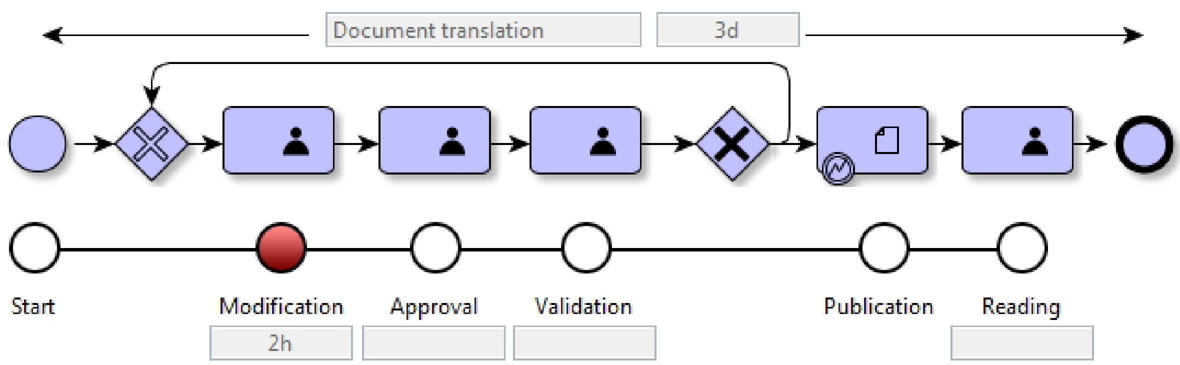
7. You can check the **Lock document during validation cycle execution** to lock the document that is being validated so that it cannot be modified by another user outside the validation cycle.
8. You can check the **Actors can see other actors names** so that each actor that opens the record sheet can know the actors that will take a part in the next stages. If you do not check this checkbox, the actors will only be able to know the actors that performed the previous stages.

The manager and owner of the validation cycle can always see the names of the other actors, even if the checkbox is not checked.

You have configured the stage start.

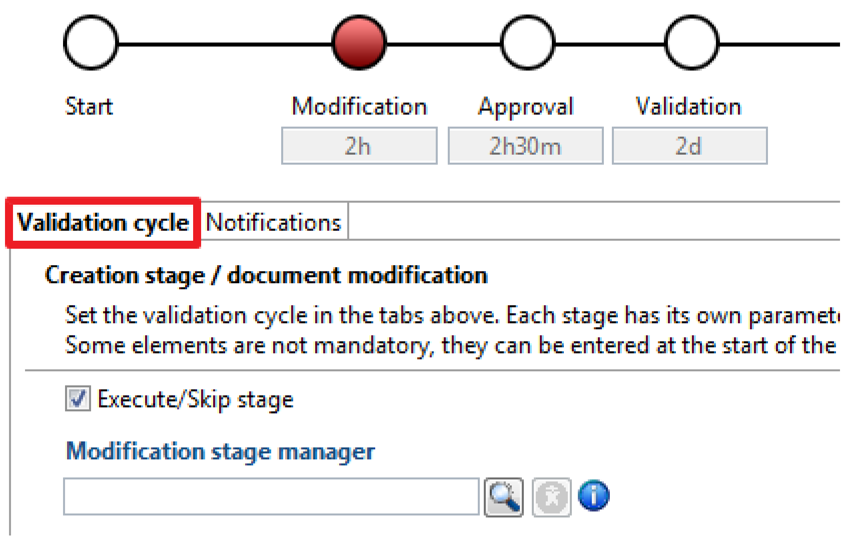
MODIFICATION STAGE

The configuration of the modification stage allows you to designate the actors in charge of modifying the document, and also to configure the stage deadlines.



To configure the modification stage:

1. Make sure that you are in the **Validation cycle** tab of the **Modification** stage.



2. Choose the stage manager, in the **Modification stage manager** field.

The user you want to assign as the modification stage manager has to be assigned to the database in which the validation cycle is located.

There can only be one modification stage manager. This is why you cannot assign a group or role as the modification stage manager.

The modification stage manager can follow the progress of the document at this stage. He can restart the validation cycle if the stage expires.

3. Set an estimated working time for the stage, in the **Estimated working time** field.
4. Set a maximum working time for the stage, in the **Maximum working time** field.

If the modification of the document is not completed in the allowed deadline, the document is filed in the expired documents.

5. Choose one or more users/groups/roles that will be the actors of the stage, in the **Actors** table:
    - Click on to open a text field allowing to add a user/group/role or users list/groups list/roles list.

      For users, groups, roles list attributes: these attributes must be used in the form of the document of the validation cycle, and must be filled in. The values entered for these attributes will be the actors of the stage.

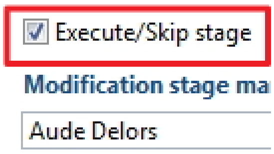
      For example, you have added a group list type attribute called "Groups for modification" in the form of the document. When importing the document and filling its form, the user chooses the group "Developers", in the "Groups for modification" field. Therefore, all the users assigned to the "Developers" group will be the actors of the Modification stage.

    - Enter the name of the user/group/role/list, and press Enter.

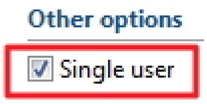
      The name of the actor is now displayed in the table.

    - Check optionally the **Email** checkbox for the system to send an automatic mail to the actor, to inform him that he has to modify a document.

Checking the **Execute/Skip stage** checkbox allows the execution of the modification stage. Unchecking it allows to skip it.



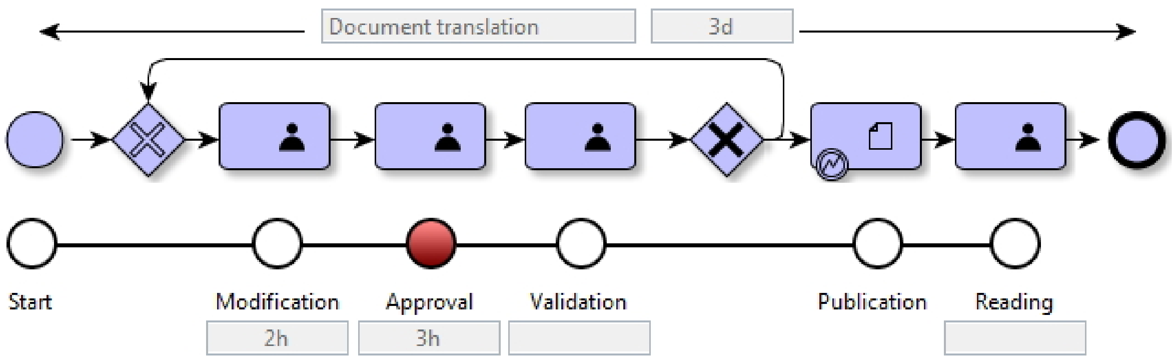
Checking the **Single user** checkbox allows the first actor that modified the document to validate the modification stage. The other actors assigned to this stage will not be able to perform any modification on the document.



You have configured the modification stage.

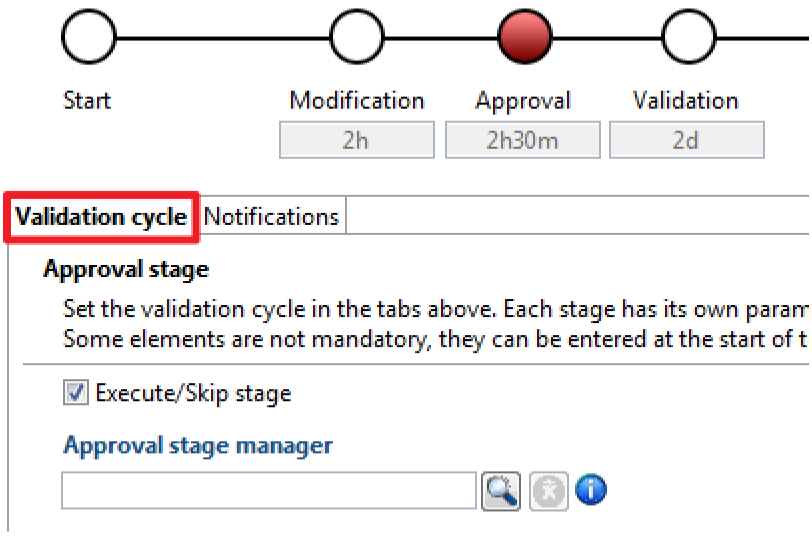
Approval stage

The configuration of the approval stage allows you to define the actors in charge of giving their opinions on the modified document, and also to configure the stage deadlines.



To configure the approval stage:

1. Make sure that you are in the **Validation cycle** tab of the **Approval** stage.



2. Choose the stage manager, in the **Approval stage manager** field.

> *The user you want to assign as the approval stage manager has to be assigned to the database in which the validation cycle is located.*

> *There can only be one approval stage manager. This is why you cannot assign a group or role as the approval stage manager.*

> *The approval stage manager can follow the progress of the document at this stage. He can restart the validation cycle if the stage expires.*

3. Set an estimated working time for the stage, in the **Estimated working time** field.
4. Set a maximum working time for the stage, in the **Maximum working time** field.

> *If the approval stage is not completed in the allowed deadline, the document is filed in the expired documents.*

5. Choose one or more users/groups/roles that will be the actors of the stage, in the **Actors** table:
   - Click on ⊕ to open a text field allowing to add a user/group/role or users list/groups list/roles list.

For users, groups, roles list attributes: these attributes must be used in the form of the document of the validation cycle, and must be filled in. The values entered for these attributes will be the actors of the stage.

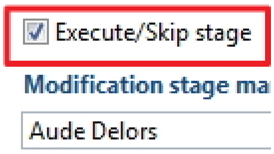
For example, you have added a group list type attribute called "Groups for approval" in the form of the document. When importing the document and filling its form, the user chooses the group "Developers", in the "Groups for approval" field. Therefore, all the users assigned to the "Developers" group will be the actors of the Approval stage.

- Enter the name of the user/group/role/list, and press Enter.

  The name of the actor is now displayed in the table.

- Check optionally the **Email** checkbox for the system to send an automatic mail to the actor, to inform him that he has to approve a document.

Checking the **Execute/Skip stage** checkbox allows the execution of the modification stage. Unchecking it allows to skip it.

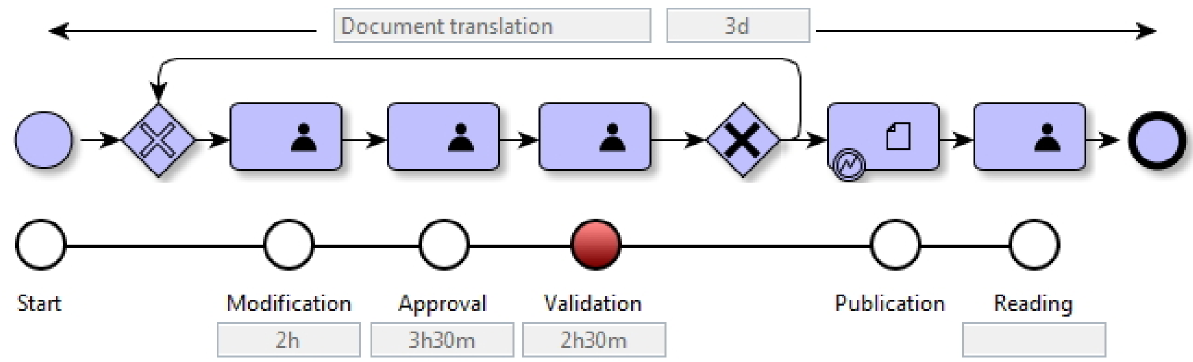


Checking the **Implicit approval** checkbox allows to validate automatically the approval stage, if the actors of the stage have not given their opinion before the end of the maximum working time. If the checkbox stays unchecked, and if the maximum working time expires, the document will be sent to the expired documents.

You have configured the approval stage.

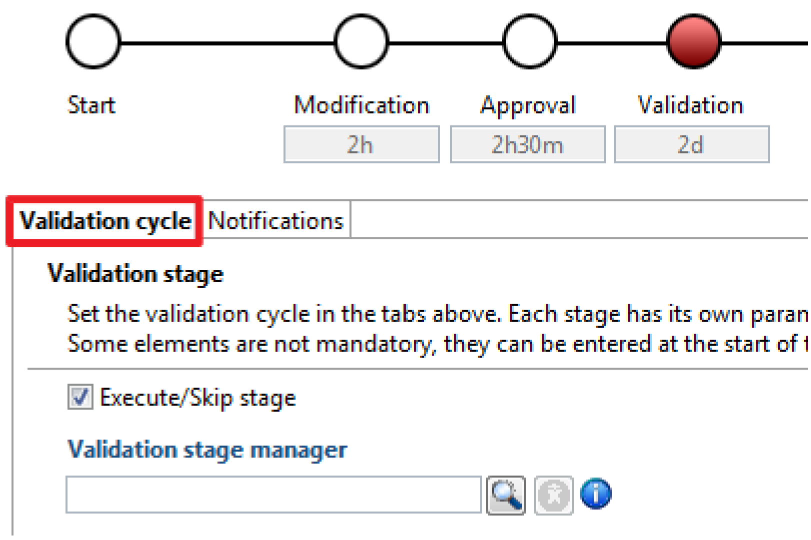
VALIDATION STAGE

The configuration of the validation stage allows you to designate the actors in charge of validating or invalidating the modified document, and also to configure the stage deadlines.



To configure the validation stage :

1. Make sure that you are in the **Validation cycle** tab of the **Validation** stage.



2. Choose the stage manager, in the **Validation stage manager** field.

> ***The user you want to assign as the validation stage manager has to be assigned to the database in which the validation cycle is located.***

> ***There can only be one validation stage manager. This is why you cannot assign a group or role as the validation stage manager.***

The validation stage manager can follow the progress of the document at this stage. He can restart the validation cycle if the stage expires.

3. Set an estimated working time for the stage, in the **Estimated working time** field.
4. Set a maximum working time for the stage, in the **Maximum working time** field.

If the validation of the document is not completed in the allowed deadline, the document is filed in the expired documents.

5. Choose one or more users/groups/roles that will be the actors of the stage, in the **Actors** table:
   - Click on to open a text field allowing to add a user/group/role or users list/groups list/roles list.

     For users, groups, roles list attributes: these attributes must be used in the form of the document of the validation cycle, and must be filled in. The values entered for these attributes will be the actors of the stage.

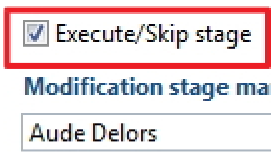
     For example, you have added a group list type attribute called "Groups for validation" in the form of the document. When importing the document and filling its form, the user chooses the group "Developers", in the "Groups for validation" field. Therefore, all the users assigned to the "Developers" group will be the actors of the Validation stage.

   - Enter the name of theuser/group/role/list, and press Enter.

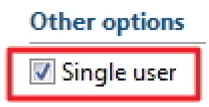
     The name of the actor is now displayed in the table.

   - Check optionally the **Email** checkbox for the system to send an automatic mail to the actor to inform him that he has to validate a document.

Checking the **Execute/Skip stage** checkbox allows the execution of the validation stage. Unchecking it allows to skip it.



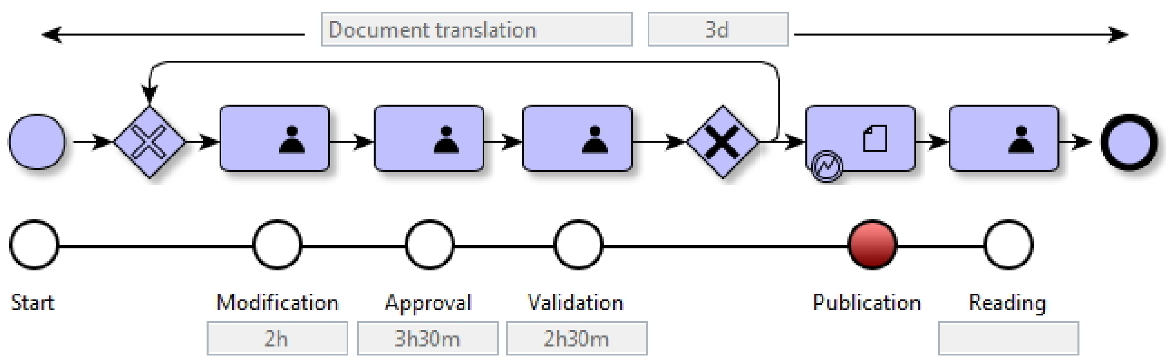
Checking the **Single user** checkbox allows the first actor that viewed the modified document to validate the validation stage. The other actors assigned to this stage will not be able to validate the document.



You have configured the validation stage.

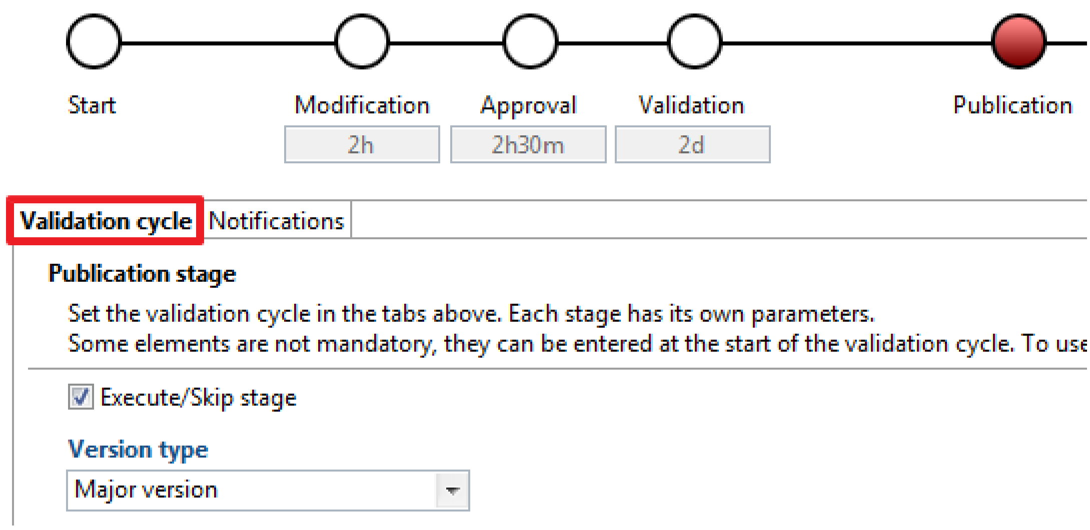
PUBLICATION STAGE

The configuration of the publication stage allows you to define the way the document will be displayed in the Web client, and also to configure its publication date.



To configure the publication stage:

1. Make sure that you are in the **Validation cycle** tab of the **Publication** stage.



2. In the **Version type** field, choose the way the modified document will be displayed in the Web client:

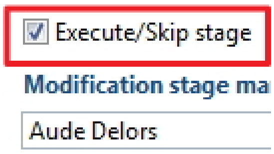
minor version, **major version** or **replace document**.

3. Choose the publication date of the document, in the **Publication date** field.
   - **Absolute**: choose a regular date (*for instance the 22th of June*);
   - **Relative**: choose a date in relation with the other validation cycle stages (*for instance 1h after the validation stage*).

   > *If you leave the "**Publication date**" empty, the document will be published as soon as the validation stage is over.*

4. Define the document validity period, after which the document will be expired:
   - Either by choosing an expiration date, in the **Expiration date** field.
   - Either by defining a relative validity period, in the **Validity period** field.
5. Define a tag to apply to the document when published:
   - Select a tag in the drop-down menu of the **Highlight document** field.
   - Choose a period during which the tag will be applied, in the **For** field (*1d, 5h, 30m*).
6. Check optionnally the **Update document fields** to automatically fill the system attributes contained in the document (attributes like "publication date", "expiration date", "validated by"...).

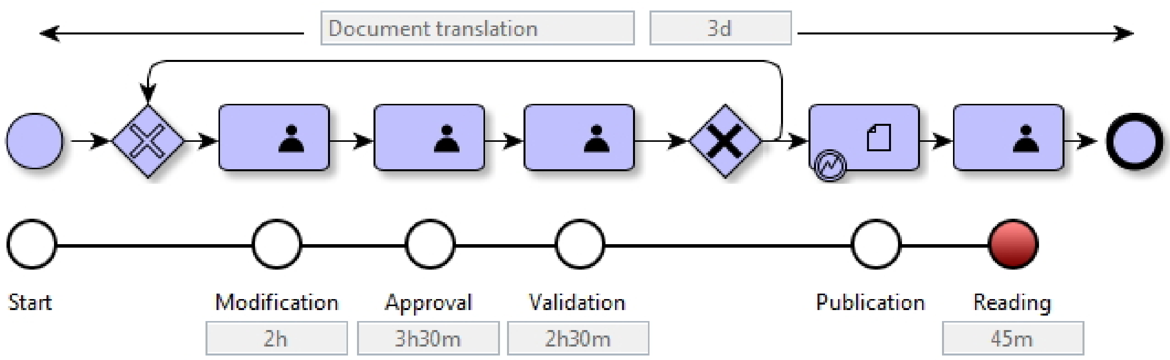
Checking the **Execute/Skip stage** checkbox allows the execution of the publication stage. Unchecking it allows to skip it.



You have configured the publication stage.

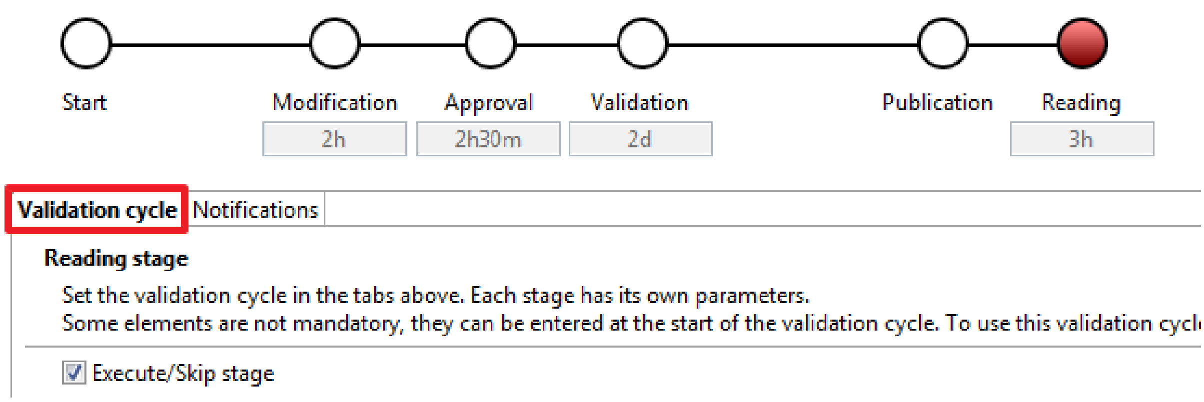
Reading stage

The configuration of the reading stage allows you to define the stage deadlines and the actors who will be able to read the modified document.



To configure the reading stage:

1. Make sure that you are in the **Validation cycle** tab of the **Reading** stage.



2. Choose the stage manager, in the **Reading stage manager** field.

> ***The user you want to assign as the reading stage manager has to be assigned to the database in which the validation cycle is located.***

> ***There can only be one reading stage manager. This is why you cannot assign a group or role as the reading stage manager.***

> ***The reading stage manager can follow the progress of the document at this stage. He can restart the validation cycle if the stage expires.***

3. Set an estimated working time for the stage, in the **Estimated working time** field.
4. Set a maximum working time for the stage, in the **Maximum working time** field.

> ***If the reading stage is not completed in the allowed deadline, the document is filed in the expired documents.***

5. Choose one or more users/groups/roles that will be the actors of the stage, in the **Actors** table:
   - Click on to open a text field allowing to add a user/group/role or users list/groups list/roles list.

For users, groups, roles list attributes: these attributes must be used in the form of the document of the validation cycle, and must be filled in. The values entered for these attributes will be the actors of the stage.

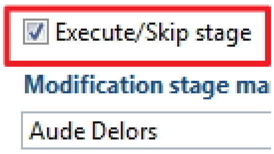
For example, you have added a group list type attribute called “Groups for reading” in the form of the document. When importing the document and filling its form, the user chooses the group “Developers”, in the “Groups for reading” field. Therefore, all the users assigned to the “Developers” group will be the actors of the Reading stage.

- Enter the name of the user/group/role/list, and press Enter.

  The name of the actor is now displayed in the table.

- Check optionally the **Email** checkbox for the system to send an automatic mail to the actor to inform him that he has to read a document.

Checking the **Execute/Skip stage** checkbox allows the execution of the reading stage. Unchecking it allows to skip the stage.

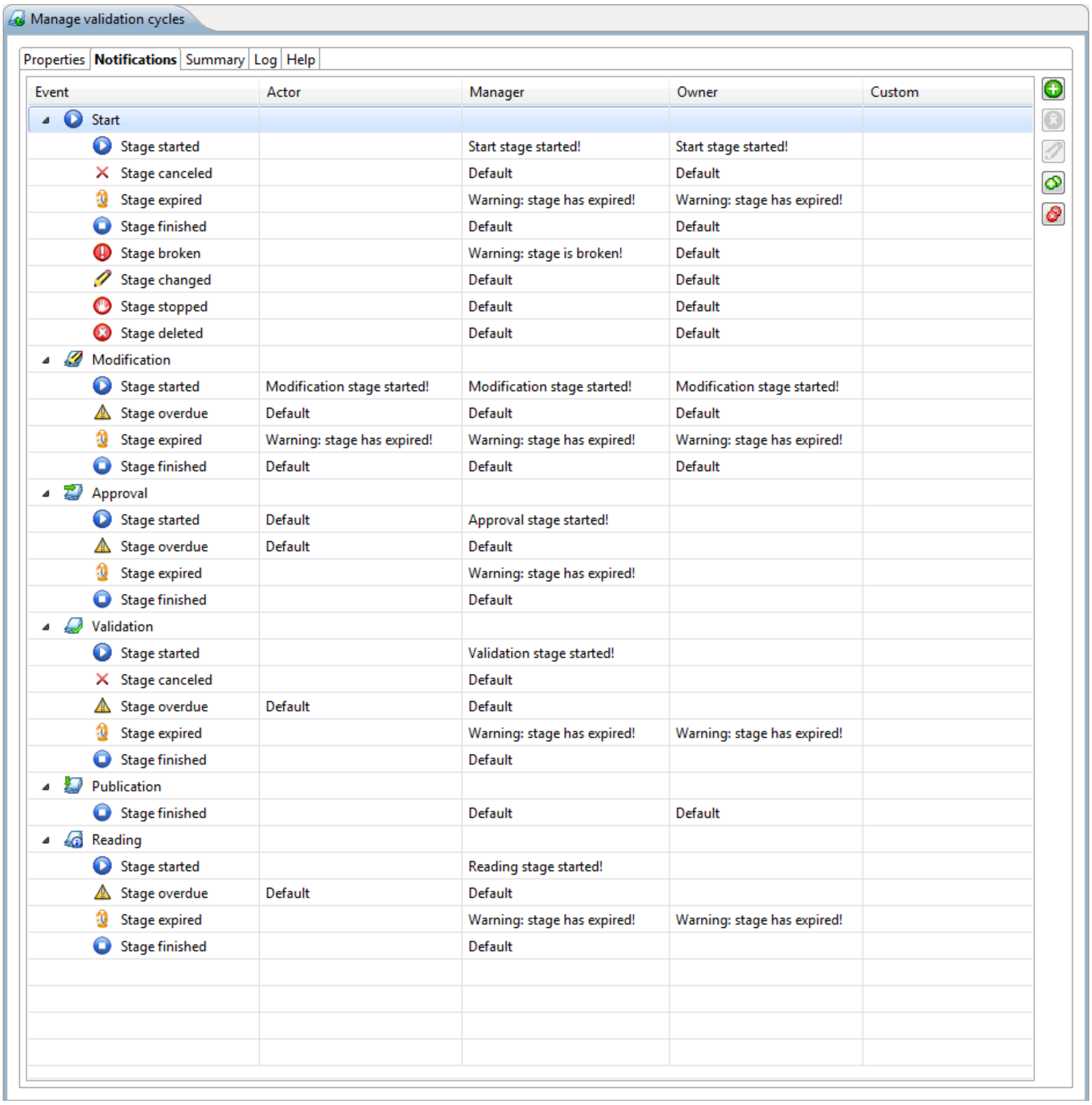


You have configured the reading stage. The modified document is now available in the explorer, either as the replacement of the original document, or as a minor or major version.

“NOTIFICATIONS” TAB

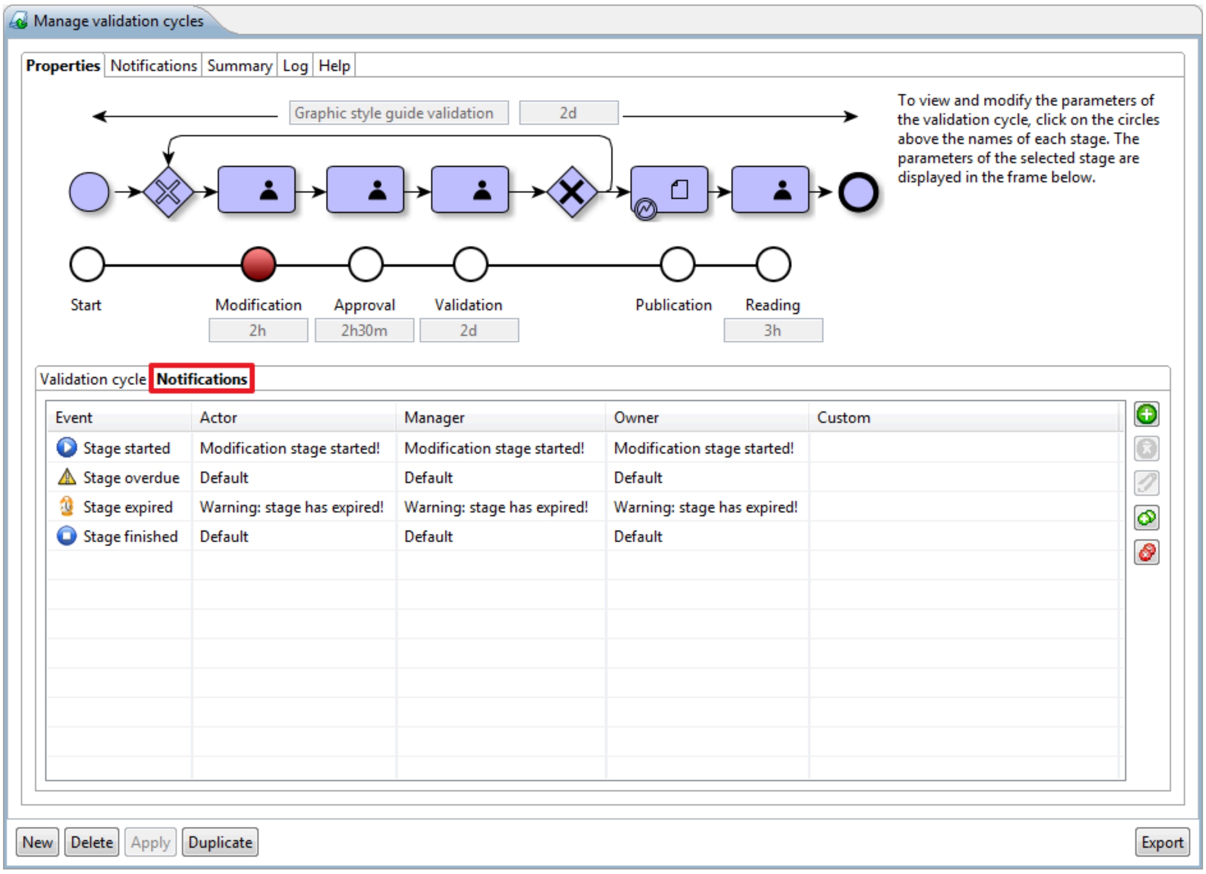
Each event of a validation cycle (stage started, expired, finished...) triggers a notification, sent as a mail to the contributors of the cycle (actor, manager, owner, custom).

The **Notifications** tab shows the table of all notifications. This table allows you to know which notifications are sent to the contributors of the cycle, for a given event.



Event	Actor	Manager	Owner	Custom
Start				
Stage started		Start stage started!	Start stage started!	
Stage canceled		Default	Default	
Stage expired		Warning: stage has expired!	Warning: stage has expired!	
Stage finished		Default	Default	
Stage broken		Warning: stage is broken!	Default	
Stage changed		Default	Default	
Stage stopped		Default	Default	
Stage deleted		Default	Default	
Modification				
Stage started	Modification stage started!	Modification stage started!	Modification stage started!	
Stage overdue	Default	Default	Default	
Stage expired	Warning: stage has expired!	Warning: stage has expired!	Warning: stage has expired!	
Stage finished	Default	Default	Default	
Approval				
Stage started	Default	Approval stage started!		
Stage overdue	Default	Default		
Stage expired		Warning: stage has expired!		
Stage finished		Default		
Validation				
Stage started		Validation stage started!		
Stage canceled		Default		
Stage overdue	Default	Default		
Stage expired		Warning: stage has expired!	Warning: stage has expired!	
Stage finished		Default		
Publication				
Stage finished		Default	Default	
Reading				
Stage started		Reading stage started!		
Stage overdue	Default	Default		
Stage expired		Warning: stage has expired!	Warning: stage has expired!	
Stage finished		Default		

Instead of using this table, you can also configure the notifications in the **Notifications** sub-tab of each stage.

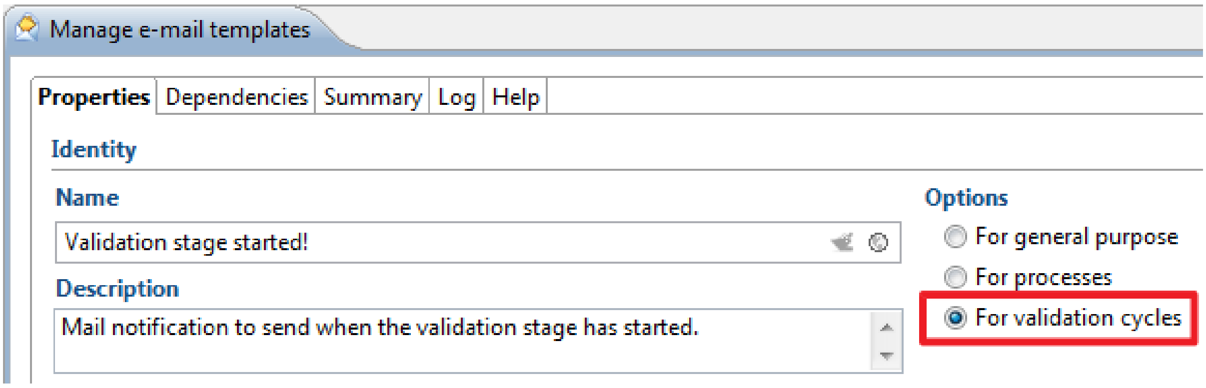


Adding a customized notification mail

Instead of sending the default notification mail, you can choose to send customized notification mails, depending on the event and/or the recipient.

For this, first make sure that:

- You have created customized mails in the **E-mail templates** branch.
- You have checked the **For validation cycles** option of all the customized mails you want to send.



Then:

1. Click on the **Notifications** tab of the validation cycle of your choice.
2. Select the event for which you want to add a customized notification mail.

   For example, select the Stage started event of the Validation stage.

3. Click on the **Edit** button at the right of the table.

   The Edit notification window opens.

4. Check the checkbox of the contributor for whom you want to add a customized notification mail.

   For example, check the Manager checkbox.

5. Select the customized mail template in the drop-down list of the selected contributor.

   The mail template is now displayed in the field of the contributor.

6. Optionally, repeat steps 4 and 5 for other contributors.
7. Click on **OK**.

   You have added one or more customized notification mails to a given stage and recipient.

"CUSTOM" RECIPIENT

For each event of each stage, you can customize the recipients of the notification. For example, instead of sending the notification to the actor/manager/owner of a given stage, you can send it to users that are external to the validation cycle.

To customize the recipients of a notification:

1. Click on the **Notifications** tab of the validation cycle of your choice.
2. Select the event for which you want to add a customized notification mail.

   For example, select the Stage started event of the Validation stage.

3. Click on the **Edit** button at the right of the table.

The Edit notification window opens.

4. Check the **Custom** checkbox.
5. Select the customized mail template in the drop-down list of the **Custom** field.
6. Enter the customized recipients of your choice:
    - **Attributes** field: allows to select one or more **Users list**, **Groups list**, **Roles list** type attribute(s). The values of these attributes become the recipients of the notification.

      For example, you have added a group list type attribute called “Groups for notifications” in the form of the document. When importing the document and filling its form, the user chooses the group “Developers”, in the “Groups for notifications” field. Therefore, all the users assigned to the “Developers” group will be the recipients of the notification.

        1. Click on .

           A list of all the available attributes is displayed.

        2. Double click on the attribute of your choice.
        3. Repeat steps 1 and 2 to add more attributes.
    - **Groups** field: allows to select one or more group(s) of your choice, that are not necessarily assigned to the database in which the validation cycle is stored.
        1. Click on .

           A field allowing to enter the groups is displayed.

        2. Enter the name of the group of your choice.
        3. Double click on the group.
        4. Repeat steps 1 to 3 to add other groups.
    - **Roles** field: allows to select one or more role(s) of your choice, that are not necessarily assigned to the database in which the validation cycle is stored.
        1. Click on .

           A field allowing to enter the roles is displayed.

        2. Enter the name of the role of your choice.
        3. Double click on the role.
        4. Repeat steps 1 to 3 to add other roles.
    - **Users** field: allows to select one or more user(s) of your choice, that are not necessarily assigned to the database in which the validation cycle is stored.
        1. Click on .

           A field allowing to enter the users is displayed.

        2. Enter the name of the user of your choice.
        3. Double click on the user.
        4. Repeat steps 1 to 3 to add other users.
    - **Others** field: allows to enter mail addresses of one ore more users, internal or external to GARGANTUA.

Deleting/Reactivating a notification

You can choose not to send all the notifications of a validation cycle. Thus, it is possible to delete the notification(s) you do not want to send.

To delete a notification:

1. Click on the **Notifications** tab of the validation cycle of your choice.
2. Select the notification you want to delete.

   For example, select the Stage started notification of the Start stage.

3. Click on **Delete the notification** at the right of the notifications table.

   The notification has been deleted, and thus will not be sent.

You can always reactivate a deleted notification:

1. Click on **Add a notification** at the right of the notifications table.

   The Add notification window is displayed.

2. Click on the notification that you want to reactivate, in the drop-down list of the **Event** field.

   For example, click on the Stage started notification of the Start stage.

3. Check the checkbox of the contributor for whom you want to add a customized notification mail.

   For example, check the Manager checkbox.

4. Select the customized mail template in the drop-down list of the selected contributor.

   The mail template is now displayed in the field of the contributor.

5. Optionally, repeat steps 4 and 5 for other contributors.
6. Click on **OK**.

   You have reactivated a deleted notification.

Deleting/Reactivating all notifications

By default, all the notifications are activated. You can choose to disable them, by deleting them.

To delete all the notifications:

1. Click on the **Notifications** tab of the validation cycle of your choice.
2. Click on **Delete all notifications**, at the right of the notifications table.

   All the notifications have been deleted, and thus will not be sent.

You can always reactivate all the deleted notifications.

- Click on **Add all notifications**, at the right of the notifications table.

  All the notifications have been reactivated.

"Summary" tab

The **Summary** tab allows you to display a summary of an item that presents its main features, like its manager, form, priority, content, etc.

The **Summary** tab is particularly helpful to have a general insight of the item, without having to browse through each tab.

The **Summary** tab also has a saving option in PDF format, which allows to view the summary of an item without the Gargantua Administration tool.

"LOG" TAB

The **Log** tab allows you to view a list of all the operations performed in one of the branches of GARGANTUA Administration Tool.

You can filter your search through the following criteria:

- Start date, end date;
- User;
- Operation.

To filter by dates:

1. Fill in the date from which you want to view the operations performed, in the **Start date** field.
2. Fill in the date until which you want to view the operations performed, in the **End date** field.
3. Click on **Display**.
   The list of the operations performed between the two dates is displayed in the **Log entries** field.

*You can also click on the **"Week audits"**, **"Month audits"**, **"Year audits"** and **"All audits"** icons, so as to view the operations performed in larger periods of time.*

To filter by users:

1. Click on the magnifying glass, close to the **User** field.
2. Fill in the user name from whom you want to view the performed operations.
3. Click on **Display**.
   The list of the operations performed by the user is displayed in the Log entries field.

To filter by operation:

1. Click on the arrow of the **Operation** field.
   A list of the possible operations is displayed.
2. Click on the type of operation desired.
3. Click on **Display**.
   The list of the operations performed in relation with the selected type of operation is displayed in the **Log entries** field.

*You can tick the **"Show login/logout events"** box to display the users connections and disconnections. This functionality is only available for the **"Users"** and **"Server log"** branches.*

*You can tick the **"Only Show error audits box"** to only display the failed operations.*

*The "**Reset**" button allows you to cancel the last filtering.*

You can also export the list of the performed operations, in .csv format.

To export a list of the performed operations:

1. Generate a list, depending on the previous criteria.
2. Click on the **CSV Export** button.
3. Choose the place where you want to save the export.
4. Click on **Save**.
   You have exported a list of the performed operations.

Duplicating a validation cycle

If you wish to create two similar validation cycles, Gargantua allows you to work on one of them, then duplicate it: you then only have to perform the few necessary modifications on the second one.

To duplicate a validation cycle:

1. In the left pane of the Administration tool, click on the name of the validation cycle you want to duplicate.

   The validation cycle management screen is now displayed in the right pane.

2. At the bottom of the right pane, click on **Duplicate**.

   A new validation cycle named "xxx **(1)**" is now displayed in the tree of the Administration tool left pane. The corresponding management screen is displayed in the right pane.

3. Perform the necessary modifications in the **Properties** tab, and click on **Apply**.

   The new validation cycle has been saved.

Deleting a validation cycle

To delete a validation cycle:

1. In the Administration tool left pane, open the sub-branch corresponding to the database of your choice.
2. Click on the line of the validation cycle to be deleted.
3. At the bottom of the right pane, click on **Delete**.

   A warning message is displayed.

4. Click on **Yes**.

   You have deleted the validation cycle.