Document number	Revision
DOCU12099	4

Getting started with Highstage

This article provides you with a basic and broad introduction to the features, capabilities, and functions, allowing you to take advantage of everything Highstage has to offer.

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Introduction

These instructions will get you up and running with Highstage. You will be introduced to the Highstage user interface, the *Actions*, *Documents* and *Part* modules including its underlying functionalities and use.

What is Highstage?

Highstage is a set of tools to support the processes in product-developing companies. Highstage contains *Actions*, *Documents* and *Parts* as separate core modules which represents the full scope of features that allows for companies to manage files, products, systems and processes throughout it's lifecycle.

Highstage is a highly versatile and configurable platform, which can be shaped to fit your many needs. Therefore, Highstage can be used to facilitate functions such as:

- Product Lifecycle Management (PLM)
- Document Management (DMS)
- Product Data Management (PDM)
- Quality Management (QMS)

Through Highstage, we make 'Management' manageable, and simplifies your company's effort in creating and handling digital resources, processes and structures.

Actions

The scope of the **Action** type is to provide a customizable feature that are able to support various business processes. It can manage different activities like projects, products, requirements, features, bugs, customer-support etc.

> *A description of Actions is not available in this version*

Documents

The Scope of the **Document** type, is to provide a foundation for the document management function in Highstage. The document type support a broad list of functionality for managing documentation of any kind.

Parts

The **Part** type aims to manage all parts from complete products and supporting systems down to screws, bolts, etc.

> *A description of parts is not available in this version

Accessing Highstage

1. Access Highstage using the URL as provided from your Highstage administrator.

Existing users will be logged in automatically whilst new users must enter a valid *username* and *password*, as shown in *Figure 1*.

> Login credentials is provided from your local IT department or directly from the Highstage administration. In most cases, your login credentials for Highstage are the same credentials that you use for Windows.

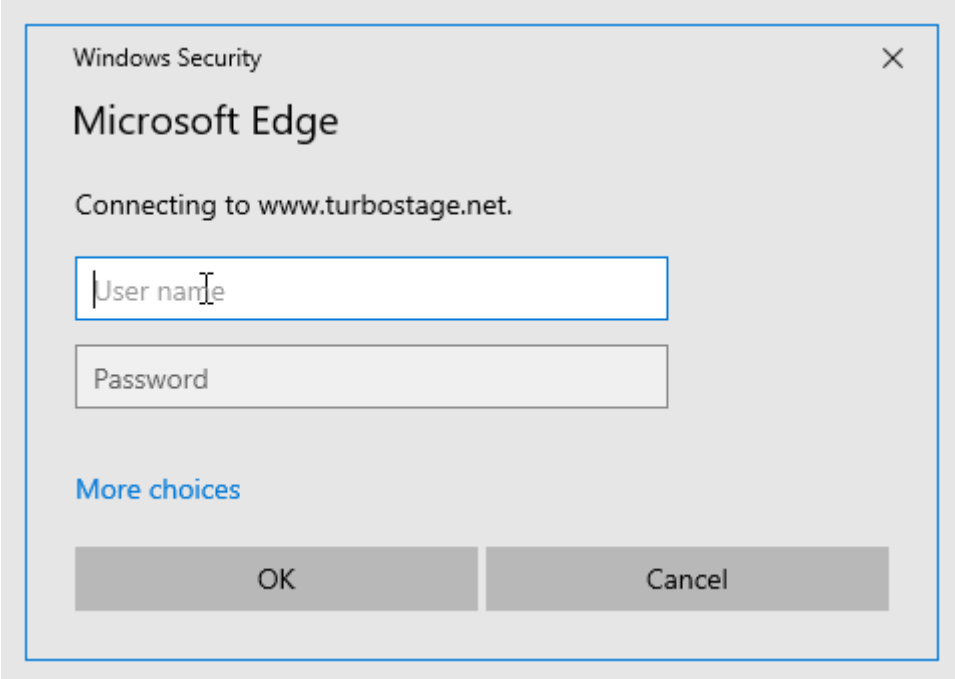

Figure 1 - Login prompt in Highstage

2. Enter a valid *username* and *Password* and click OK.

Once logged in, you will be redirected to the Home screen of Highstage, as shown in *Figure 2*.

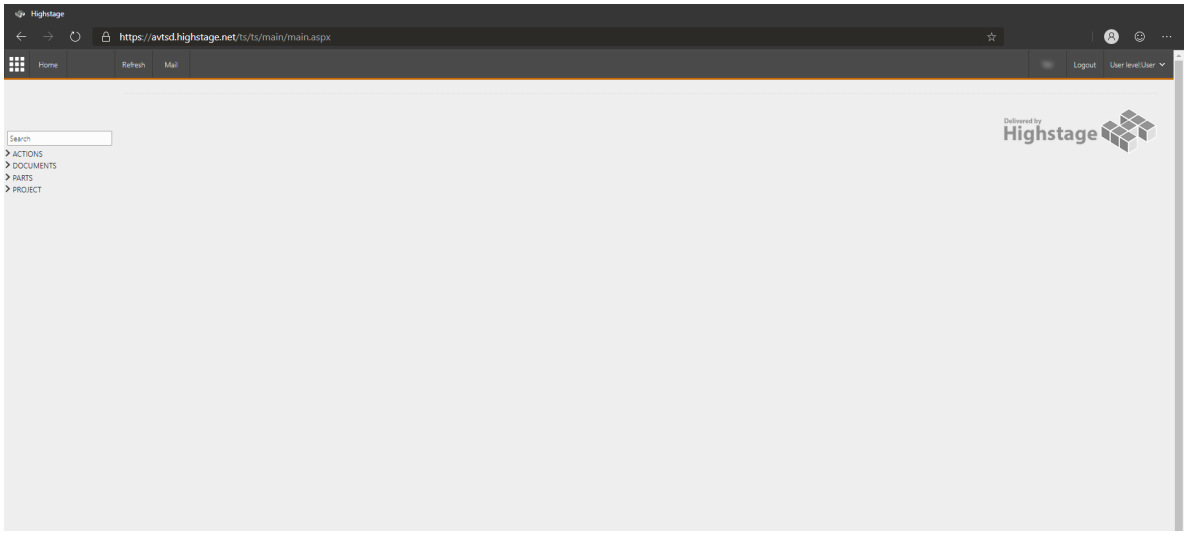

Figure 2 - Highstage Home screen

Highstage User Interface Overview (Workspace)

Highstage makes use of the same general user interface, no matter which function in Highstage is accessed. The simple Highstage interface gives the user a chance to master Highstage, by reading the rest of this guide.

The Home screen, as shown in *Figure 3*, presents the general view of Highstage consisting of 3 separate sections:

1. Sidebar Navigation.
2. Main Content.
3. Header.

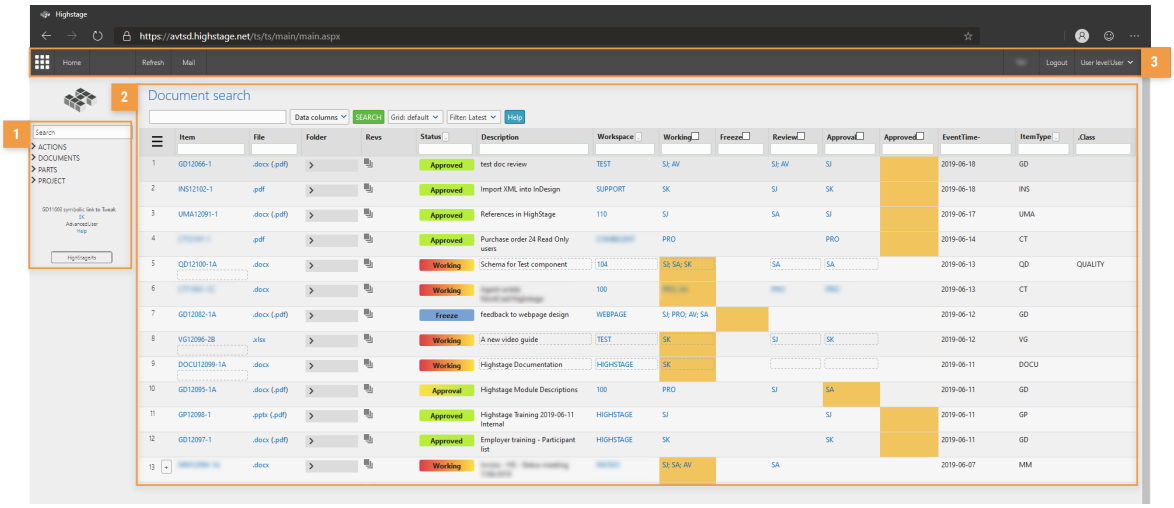

Figure 3 - Highstage menu frames

Sidebar Navigation Menu

The navigation menu, as shown in *Figure 4*, provides an overview and allows for easy access to the various features and contents of Highstage. The menu consists of 3 separate sections:

1. Search field
2. Menu items
3. User profile

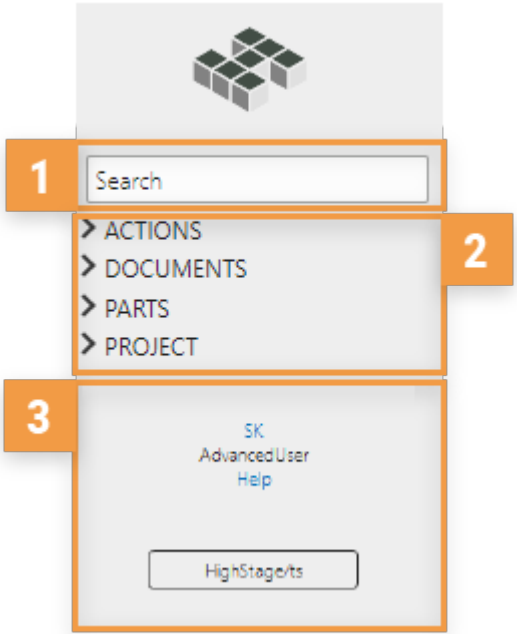

Figure 4 - Site Navigation Menu

Search field

The **Search field** is placed in the top of the menu frame as seen in *Figure 4*. The search function gives the user the ability to search in any Document, Part or Action.

Menu items

Menu items is placed under the search field. By default it consist of the 3 main base types ('Parts', 'Actions' and 'Documents') as shown in *Figure 4*. In addition, a 'Project' menu item allows for the user to create new Projects. A project can function as a *Workspace* and thus serve as a way to group resources and manage access to items for selected users.

The menu initially consists of 4 elements (**Actions**, **Documents**, **Parts** and **Project**), your company can however add more, so the listed menu items might differ. To navigate around in each type, press the [>] on any of the items in the menu, and the sub-items for this type is shown.

User profile

The **User profile** shows the initials of the user, the current user level and a link to access the Highstage help documentation.

Header

The header frame, as shown in *Figure 5*, is placed on top of each page in Highstage. It includes various features allowing the user to manage contents within the system. The functionality present in the header frame will vary depending on the users' rights provided by the Highstage administrator.

Figure 5 - Highstage header

The header, as shown in *Figure 5* consists of the following elements:

1. **Toggle navigation menu**:
   Highstage supports the possibility to hide or show the left sidebar navigation menu.
2. **Home**:
   Navigates the user back to the main content page.
3. **Refresh**:
   Refreshes the main content page. This feature is advantageous over using the built in browser refresh (F5 shortcut).
4. **Compose mail**:
   Highstage supports the function of sending emails directly.
5. **Event log**:
   This opens a new tab in the browser and shows a detailed description of the changes made to an object.

> *The *Event log* is available only when the user has accessed a specific *Action*, *Document* or *Part*- object.*

6. **System**:
   Enables the user to trace security on a specific document. Information regarding the rights to access, read and edit a specific document is available through this feature.

> *System is only available for system administrators*

7. **User initials**:
   Shows the initials of the user that is currently logged into Highstage.
8. **Logout**:
   Log the current user out of Highstage.
9. **User level**
   Enables the user to change *'user level'*. This will enable or disable more advanced content and features dependent on the level. The user level determines the accessibility to edit content and access specific features. By default, all users have the access level as 'User'. The user may change level to 'AdvancedUser' which will give access to all features in Highstage. More experienced users will typically work in 'AdvancedUser'.

Main content

The main content section contains the actual content available and associated functions provided through Highstage.
As a default, the mainframe after accessing Highstage is set to display an opening page.
Each menu item has its own mainframe view. Most of the interface details are generic in Highstage.

in this section, we will describe most of these generic functions that are available in Highstage.

A typical view of the main windows can be seen in *Figure 6*.

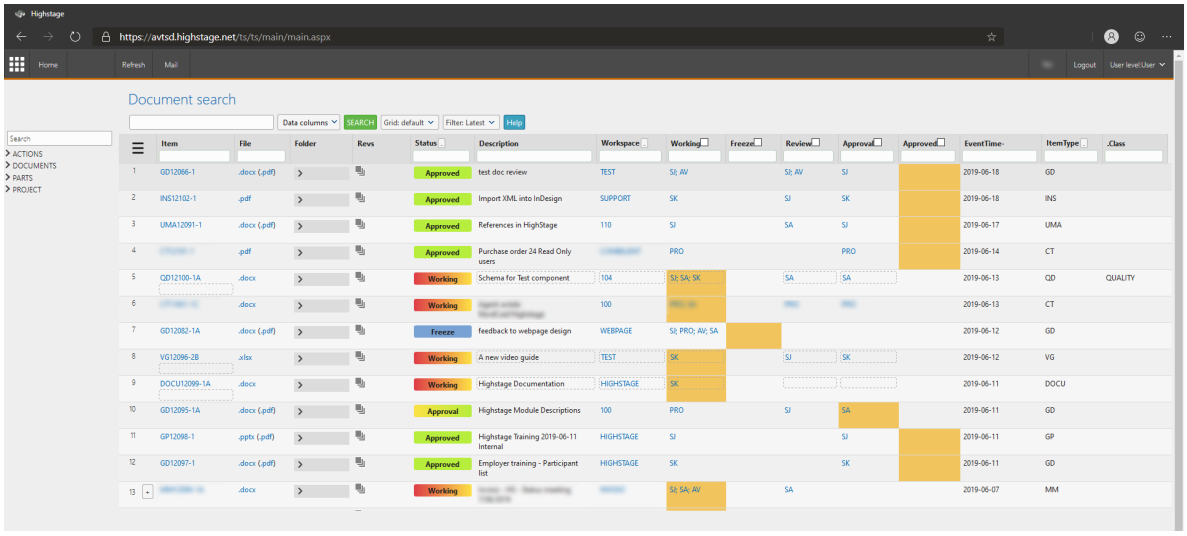

Figure 6 - Search grid

> *In Highstage the user have multiple possibilities to manipulate the view for their own benefit. This filtering of data will only happen in the user's browser, and will not affect any of the other users on the system.*

Search

There are four distinct methods for finding and accessing data through Highstage:

1. Searching
2. Revision filtering
3. Column filtering
4. Grid view access

Searching

In the top of the "Document Search" window, the search field is given. It enable the user to make a search query not only in the column data, but also in the data of each file in every document. This enable the user to find information in documents where the description is not sufficient in describing the content.

As standard the search function only search in column data. This can be changed by clicking on the dropdown box next to the search button.

Highstage also support "quoted phases" in the search query field, if the user types something in between a pair of quotation marks, the exact text in between those marks is searched for in either the column data or the file data, depending of the chosen value of the dropdown box.

Only the AND operator is available, meaning that all search terms are combined in a logical AND operation. However the NOT operator may be applied by preceding a term with the '-' (minus) character. Phrases must be within double-quote characters.
This functionality is available in the search field when searching for data in files or when searching in column data.

> **Example:**

> An example of this could be searching for data in a document or a column name containing both the word red and car: red car or car red
> The space between the words will be understood by Highstage as an AND operator, so the results will contain both the word red and the word car. However the order of the words is not important, likewise there could be words in between car and red, and it would still be a result.

> **Example using AND operator:**
>
> If the user want to find results where the exact combination red car is used the quotation marks can be used in the search field, in this case the search query should be *"red car"*.

> **Example using NOT operator:**
>
> If the user wants to find results where the word car appears but not the word red, the search query could be: *car –red.*

> **Example using AND & NOT operator:**
>
> If the user wants to find results containing the words red and car but not the word diesel the search query could be: *red car –diesel.*

Revision filtering

As the users work with documents in different revisions and states, a filter can be applied so it is easier to find the newest approved document, the filter function can be used to do this.

The default filter option in Highstage is called *Latest*, it can be changed by clicking on the button *[Filter: Latest]* next to the grid button. Besides Latest, there are several other filters that can be applied to the search query in Highstage.

The following list describes the possible filtering of documents through revision control.
The data shown after a filter is applied, will take other search queries into account.

- **All Revisions:**
  This option will show all revisions of the documents matching the existing search query.
- **Latest:**
  This option will show only the latest revision of each document based on the additional search query.
- **Latest approved:**
  This option will show only the latest approved revision of each document based on the additional search parameters.
- **Latest + latest approved:**
  This option will show the latest approved together with the latest revision of each document.
- **Obsolete:**
  This option will show all obsolete documents based on the additional search parameters.
- **Rejected:**
  This option will show all rejected documents based on the additional search parameters.

Column filtering

The top row in the Results section is a set of data entry boxes where it is possible to type. It will be used as a filter for values in that particular column. It is easy to filter out the records that are not needed. This filtering can be applied together with the additional search parameters.

Grid view access

Highstage document view consist of a huge variety of columns with data, many of them not relevant to the ordinary user, therefore a default grid is set for the user, where only the typical relevant information is displayed. This is just one of the possibilities to find the relevant data in Highstage.

The default grid in Highstage is called *[Default grid]* and this is the only available option for a standard user. The default grid consist of the following columns:

- Item name
- File type
- Link to folder view
- Link to revision view
- Document status indication
- Description of the document
- Document Workspace
- List of document authors
- Freeze indication
- List of document reviewers
- List of document approvers
- Approval indication
- Time for last status change
- Item type
- References to document
- References from document

> **Alternative grid types**
>
> A user can be given rights to have additional grid types, customized by the administrator, if there are other grid types available they can be chosen by clicking on the *[Grid: default]* button just under the “Document Search” text next to the [Search button].

> **Raw grid**
>
> A grid type called raw grid is given if the user level is set to *[AdminRead]* or *[AdminWrite]*. The raw grid enables the user to see all columns in the Highstage Database related to the specific document. This grid is used for administration purposes.

Documents in Highstage

Manage all types of documents and files throughout your enterprise using the Document module in Highstage.

The Document module supports MS-Office documents, folders, firmware, software, electronic- and mechanical CAD etc.
Documents are contained in an open file-server folder-structure (not stored in database) to be easily accessible by developers and development tools. Logical references between documents may be done using references in Highstage. Physical references between documents may be

done directly between physical files, as example software/firmware modules may include libraries from lower level modules (components) and mechanical assembly drawings may reference lower level mechanical components like screws and bolts.

References may be done to latest version for initial fast development and later when higher level of version management is required references may be locked to specific versions. Developers will appreciate the open architecture of the document manager; documents may be explored using file explorer.

Highstage manages templates, simplifies the review and approval process and keeps track of all document revisions. MS-Office document properties and headers are updated automatically and PDF renditions are generated automatically by the server.

Figure 7 highlights the various states and workflows of Documents, supported by Highstage.

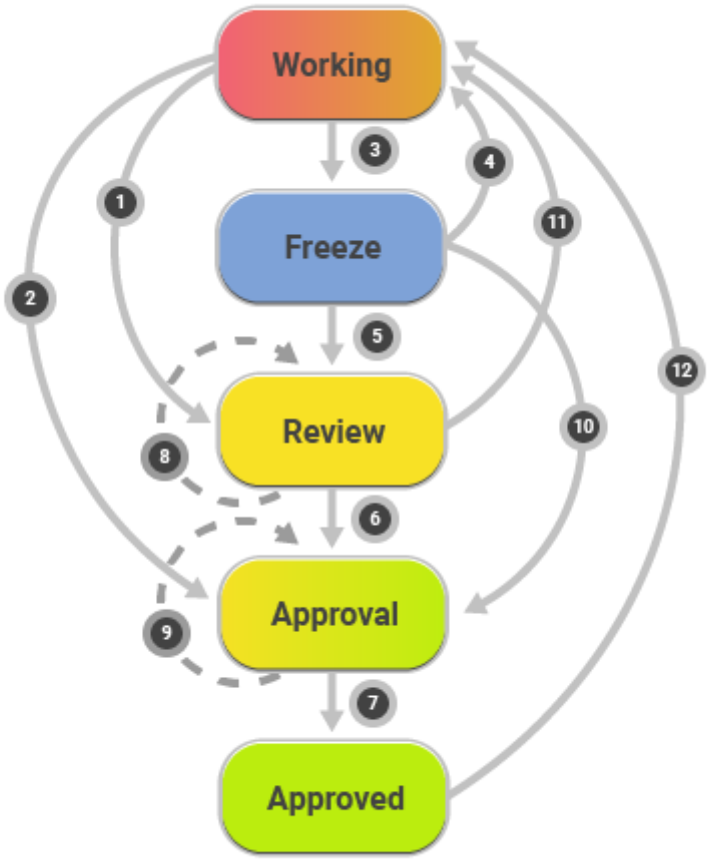

Figure 7 - Diagram over Document states in Highstage

Sidebar Navigation Menu for Documents

Available features associated with Documents can be accessed by expanding 'Documents' in the navigation menu, as shown in *Figure 8*.

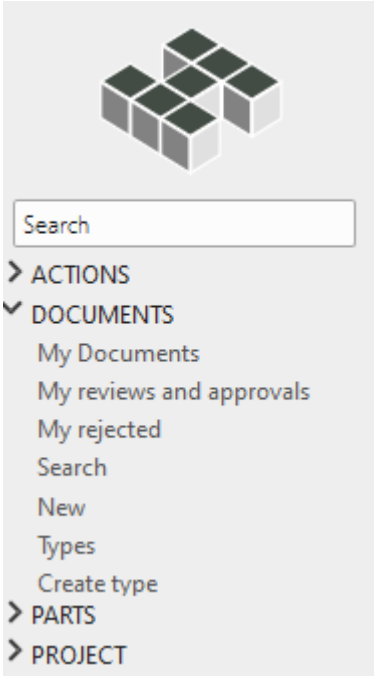

Figure 8 - Document features from the navigation menu

List of default document features from the navigation menu:

Menu item	Description
My Documents	Documents in any active state *(Not obsolete)*, where the user is set as author
My reviews and approvals	Documents where the user is set as a *reviewer* or *approver*
My rejected	Documents that the user, as an *approver*, has rejected for being *approved*
Search	Search through documents where the user has appropriate reading permissions
New	Gives the user ability to create a new document of any type, in any workspace the user has the right to be in
Types	List the different subtypes of documents, and details about them and which template they are based on.
Create type	Create a new subtype for documents

My Documents

My Documents will give a list of the users associated own documents as shown in *Figure 9*. The documents in this grid are the documents where the user are assigned as author.

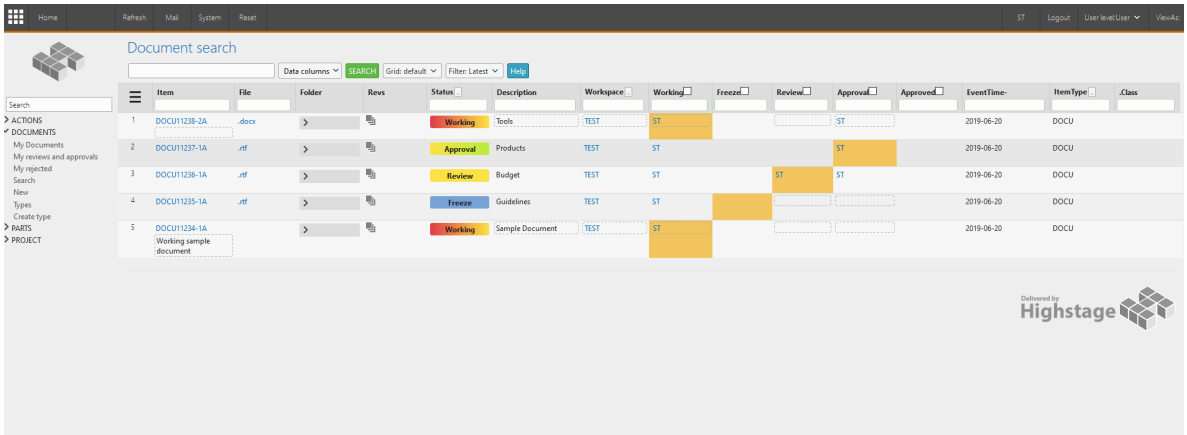

Figure 9 - My Documents

> The documents in 'My documents' is by default filtered by the latest revised documents, so that only the newest version of a document is shown. Visit *revision filtering* for more information.

My reviews and approvals

My reviews and approvals as shown in *Figure 10* will list the documents where the user is currently assigned as a *reviewer* or *approver*.

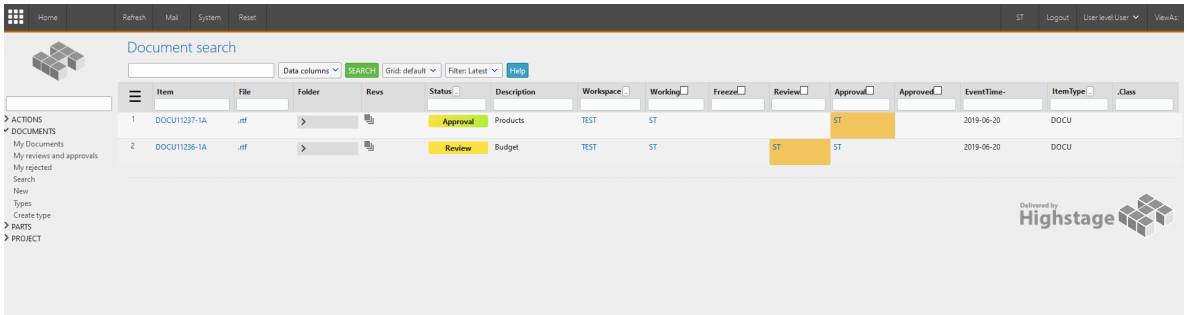

Figure 10 -My reviews and approvals

> All listed documents under *My reviews and approvals* are active documents which are currently awaiting the users direct action on **Review** (reject / accept) or **Approval** (reject / accept).

My rejected

My rejected, as shown in *Figure 11*, shows the full list of documents that the user has rejected from being approved.

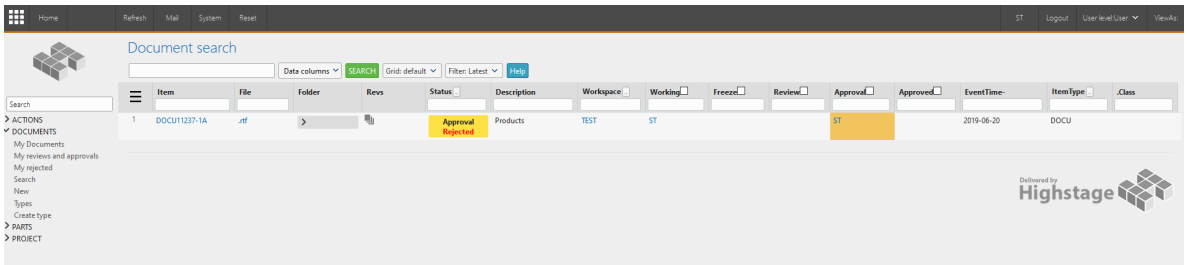

Figure 11 -Rejected documents

Search

Search, as shown in *Figure 12*, lists all documents that the user is able to access.

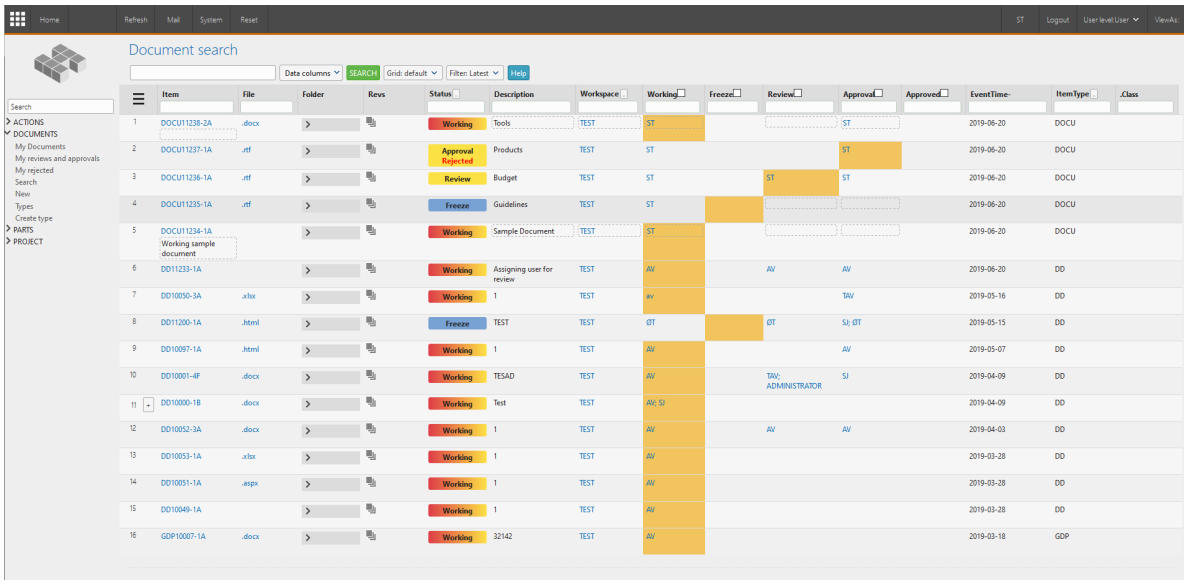

Figure 12 -Document search

New

New, as shown in *Figure 13*, allows for the user to create a new Document.

1. To create a new Document, click on *New* to navigate to the *Create new Document* content page.

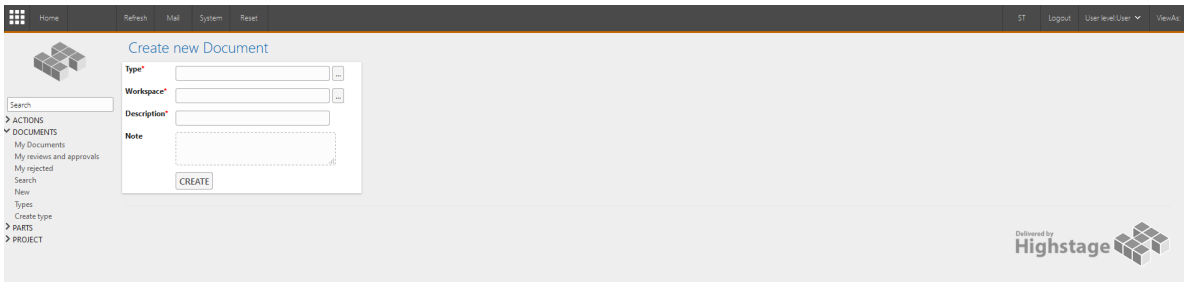

Figure 13 -Create a new Document

To create a document the fields marked with the little red star needs to be filled out (*Type*, *Workspace* and *Description*).

Fill in the blank fields by selecting options from the list, produced by clicking the [...] button. By clicking the button a view of previously used items or all available items respectively will be shown.

Descriptions of mandatory and optional fields for creating new Documents:

Field	Description
Type* *[Required]*	The type of the document that are about to created. This will automatically provide the document with an associated document template. This type cannot be changed afterwards. This field is necessary to be filled, when creating a new document.
Workspace* *[Required]*	The workspace the document that are about to create will be assigned to the workspace that is chosen in this field. This field can be changed later on. This field is necessary to fill, when creating a new document.
Description* *[Required]*	A short description associated with the document. *Notice that the doument name will be a combination of the 'Type' and 'Description'.*
Note *[Optional]*	The note can be used to further describe the document in details. The note can be changed as long the document is in *Working* state

2. Click *Create* to create a new Document.

Once created, the user will be navigated to the Document view of the newly created document.

> *Visit Document view and configuration for a detailed description of the Document view.*

Types

Types, as shown in *Figure 14*, lists all existing and available document *types*.

Types can be associated with a document template. This allows for the user to easily create new documents based on a template, by creating a new document based on a specific type.

Similarly, document types can be associated with specific user-groups to control accessibility to specific groups or individuals.

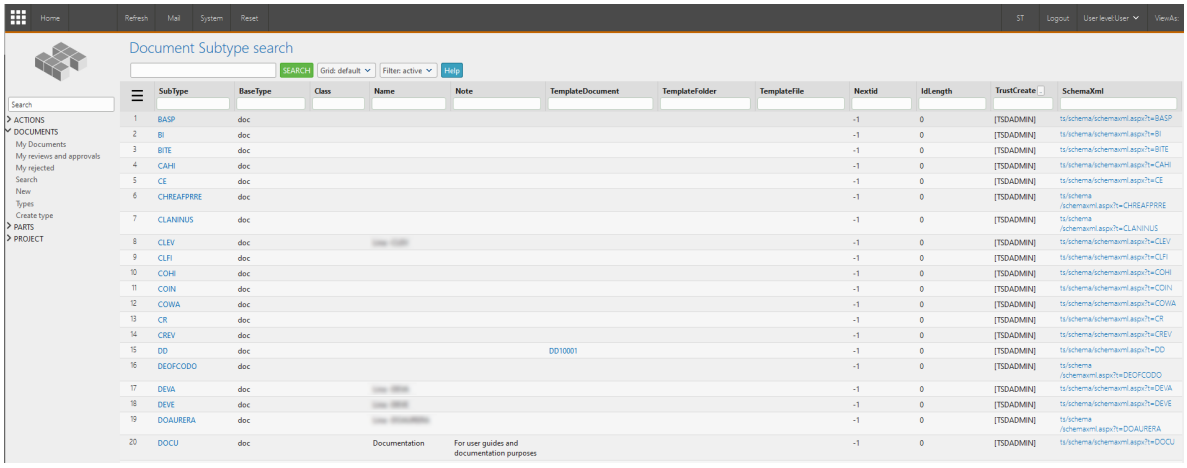

Figure 14 - List of available document types

Templates in Highstage can essentially be any type of file. In reality, however, they are mostly Microsoft Word DOC/DOCX files *(not Word templates *.DOT)*.

Create type

Create type, as shown in *Figure 15*, enables the user to create a new type for documents.

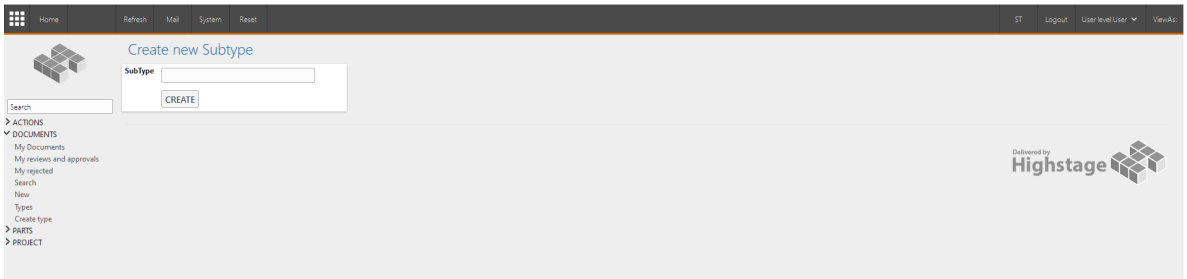

Figure 15 - Create new document type

1. Enter a name for the type in 'Subtype*.
2. Click on 'CREATE'.

Once created, the user will be navigated to the 'Type' view of the newly created type as shown in *Figure 16*.

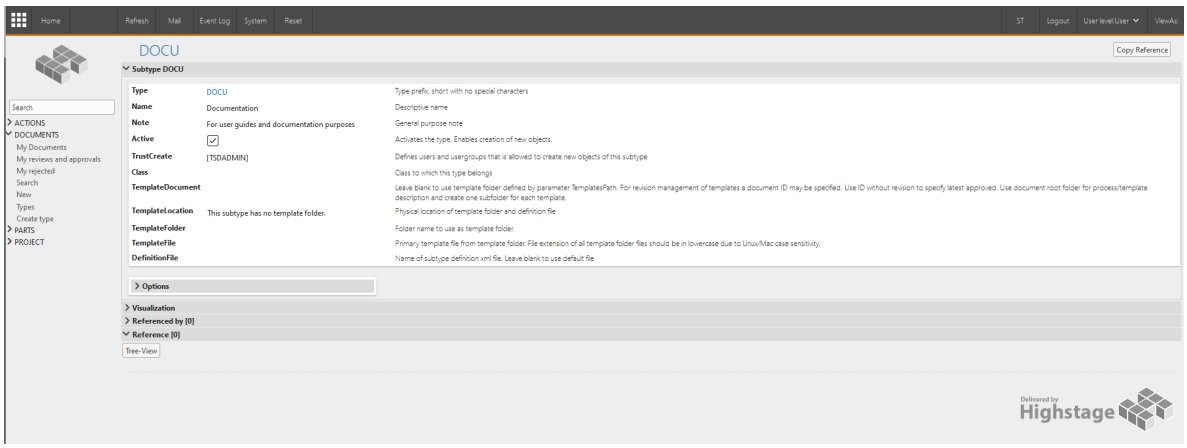

Figure 16 - document type view

Document view and configuration

Highstage will create a document with an automatically generated document number. The user will automatically be redirected to the document page for the newly created document.

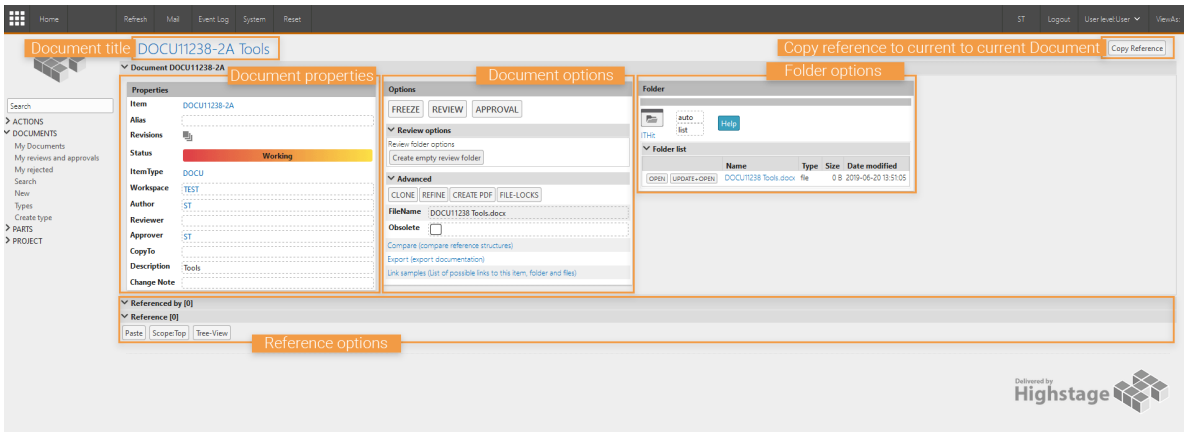

Figure 17 - Document view

Document title

The Document title is automatically generated for all new Documents. This title is created based on *Item type*, *Document number*, *Document revision* and *Interim version*.

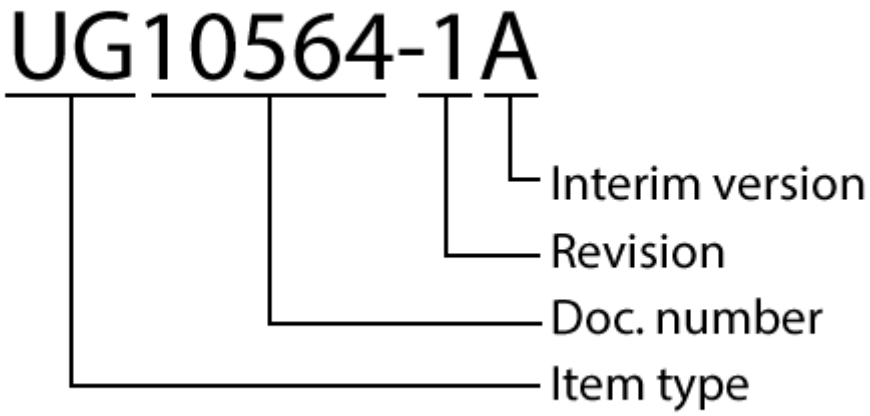

Figure 18 - Document title structure

Properties

The Document view consist of several fields, some of them are pre-filled with information, this information were given when the document was created. Only these pre-filled fields are mandatory:

A list of all fields are listed below, all with a description about the specific properties, and best practice to fill it out.

Property	Description
Item *[generated]*	The unique code given by Highstage to the document. The item name describe some properties of the document such as the Item type (Subtype), Revision and the interim version.
Alias	Together with the description of the document, *Alias* helps the authors to describe the document for the users. The alias function can be used to further specify the content of the document. Each Document are able to carry an alias, this alias will be visible in the grid view under the item name. If the same document exists in 2 separate cases. An example could be 2 different customers or 2 different employers, in this case the alias could contain the customers document ID. The alias function can be used, to identify the right document. But is not required to be filled out on the document.
Revisions	Revisions for each document carry a reference to earlier versions of the same document, together with all interim versions of the document. Former revisions use almost the same document number, just a lower number on the revision number place.
Status	Each document has a status indication, depending of the state the document has.
ItemType *[Required]*	All documents of the same item type will be given the same initials before the document number. For reference a list of all types can be found in the list of types, by clicking types in the document menu.
Workspace *[Required]*	Workspaces is a central part of Highstage document functionality. Each document need to be placed in a workspace which defines ownership and security. As long as the document is in working state, a document can be moved to other workspaces. When document is no longer in working state the document can only moved by a Highstage administrator (AdminWrite).
Author	All authors that has access to change the document, will be listed in this field. Authors can assign reviewers and approvers for the document, and can change document information and properties, each author is indicated by his initials.
Reviewer	All assigned reviewers for the document will be listed here, a reviewer need to review the document, when the author have sent it for review. The reviewers have access to the document in all document states. If there is no reviewers specified for the document, the author(s) will have the role to review the document.
Approver	As soon as the reviewer(s) have marked the document as reviewed and accepted, the document is sent to the approvers for approval. All approvers need to approve the document before the document can be finally “approved” and will change state in Highstage.
CopyTo	This function enable the user to specify user(s) or predefined groups of users to see the document, in all states. As soon as the document is approved, the user(s) and group(s) in the [CopyTo] field, will receive a notification mail informing them that the document state has changed, together with a reference to the document.

Property	Description
Description	A manually filled description associated with the created document. This field is prefilled with the information given in the creation process. However it can be changed on this page

| change Note | Change note is a “change log” field where it is mandatory to include a description or reason for making this version of the document *(for example: 1. version, Changes in chapter 11 due to new FDA requirements etc.)*.

Document options

The *Document options* shown in Figure 19, are the available options for a user.

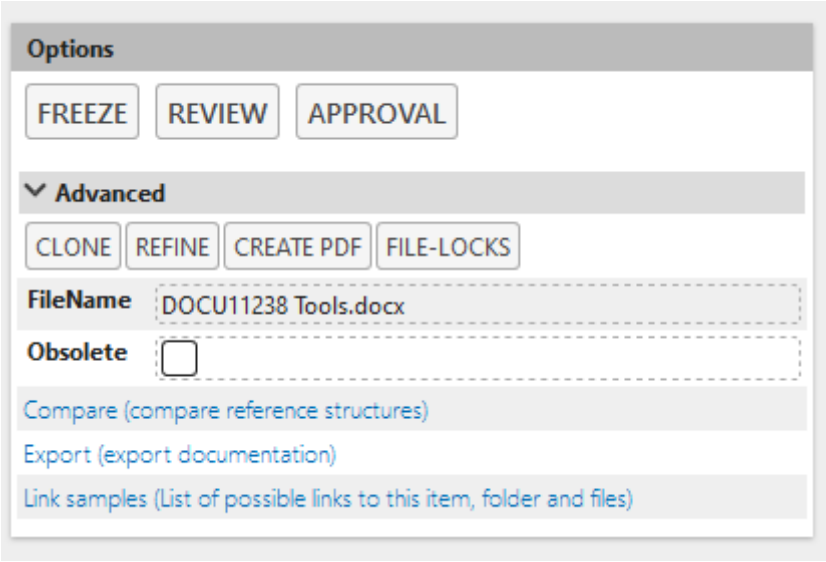

Figure 19 - Document options

The available options includes **Freeze**, **Review** and **Approval** which represents the different states of the Document. The state of the Document can be changed by the author, reviewer or approver.

Additionally, **Review options** and **Advanced** can be accessed from the options menu.

Freeze

By clicking on **[Freeze]** the user send the document in Freeze state. Freeze state isolates the document so it can no longer be edited. The Freeze state may be used when author reaches an editing milestone and wants to freeze the document so that the work is preserved. When document is in freeze state the author can decide whether to proceed to review/approval states or to further edit document by making a change which creates a new working revision. In some cases freeze/change may be used to provide a backup of the document at a specific editing milestone.

Review

By clicking on **[Review]** the user send the document in review state, as soon as the button is pressed Highstage will start to process the document. A document marked for *Review* can be seen in *Figure 20*.

> Once a Document is sent to *Review*, the reviewers receive a notification through mail to review the Document.

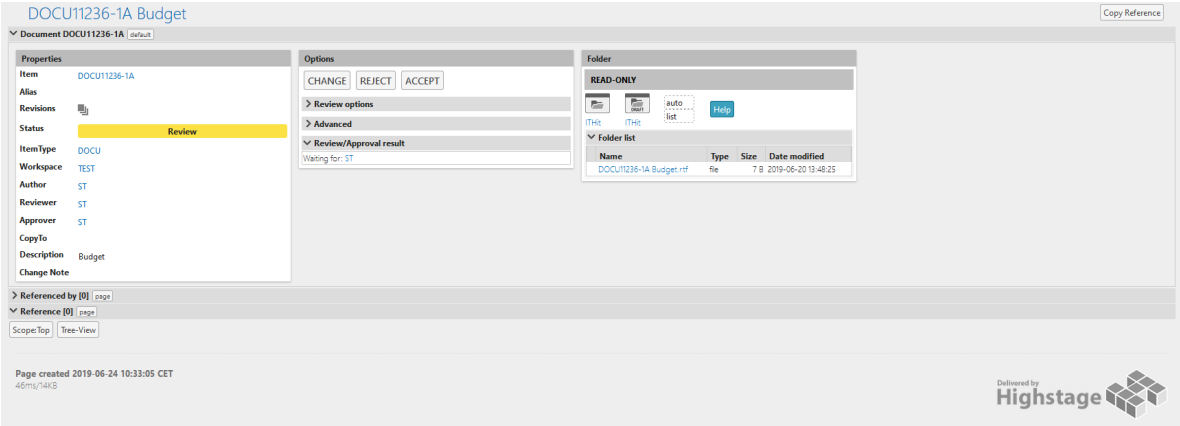

Figure 20 – A document in Review state, seen from an author

When a document have been sent to review by an author, the document goes in to review state. This state enable the assigned reviewer to read the document while the document is locked from editing, while it's waiting for review.

Figure 21, as seen below, lists the available options for a Document in Review.

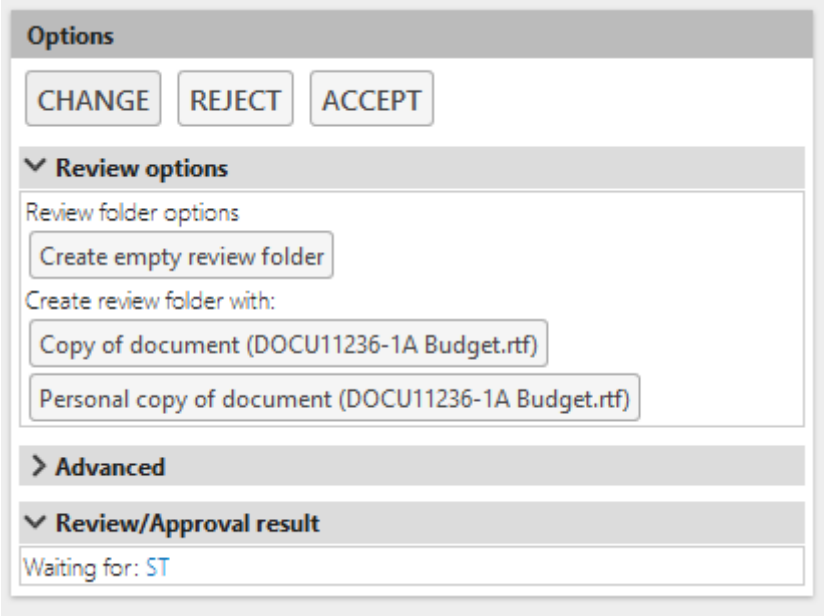

Figure 21 - Options available for a Document in Review.

For reviewers to add comments to the document, select **Copy of document**, to create a copy of the document in a new folder in which, reviewers can modify the document and add comments. Only files in the review folder can be edited by the author and the reviewers.

Highstage supports multiple ways of documenting the review:

- **Comments in Review Log**

  The author prepares a review log with review task etc. in which the reviewers can add their comment and the author afterwards can fill in the actions on the comments.

- **Comments in a document copy**

  A copy of the document is generated and the reviewers uses the review function in Word to add their suggestions for changes.

- **Comments in personal document copy or as simple comment**

  The document is just sent for review. The reviewer can either add a simple comment when Accepting or Rejecting the document or the reviewer can generate a personal copy of the document for the review comments.

Once a document is set to the **Review** status, the document is set to *read only*. The current version of the document is ***write-protected*** and now limits the document access.

The *Status property* is also set to **Review** to illustrate the current state of the Document.

Approval

By clicking on **[Approval]**, the user skips the *Review* process and moves directly to the approval process.

Here, the user that is assigned to be the *approver* receives an email notification regarding the need to reject or accept the approval of the submitted document.

Review options

The **Review options** allows for the author to configure, what is going to happen when the document is sent for reviewing.

Clicking *Create empty review folder* creates a new folder, which can be used for the feedback for the review users. As seen in *Figure 22*, under the 'Folder options' a new folder is made available for review documents and comments.

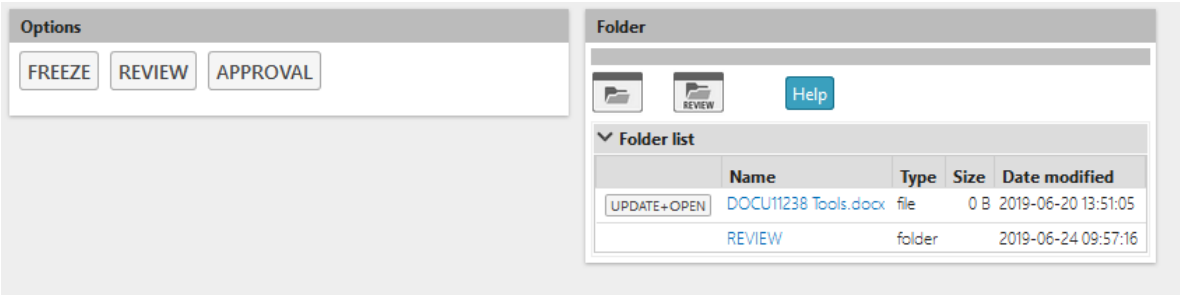

Figure 22 - Settings and access for the created review folder

Document Status indication and color-coding

For all documents, a color-coded status field indicates the state of each document. The different statuses can be seen in the scheme below, together with an explanation of each status and which state they belong to:

Status	Color	Icon	State	Description
Obsolete	Red	Obsolete	Obsolete	The document is set to be in obsolete state, the authors can remove obsolete condition from the document, and continue working on the document, afterwards.
Working	Red to yellow	Working	Working	The document has the working status, when it has been created, at this point it is available to change by the authors
Freeze	Plain blue	Freeze	Freeze	A document can be frozen, when it is in working state, frozen is a state used when a milestone for a document needs to be created. This enable the authors to save the document at a certain point, but without the review-or approver's attention needed. At this point reviewers and approvers can still be changed for the document.
Freeze Not Latest	Blue to gray	Freeze Not latest	Freeze	This status is the same as the previous one, but here the status indicate, there is a newer revision of this document there have been approved.
Review	Yellow	Review	Review	The document is in review state, when one of the authors have changed the condition from working or freeze. From this state properties on the document cannot be changed, also including authors, reviewers and approvers. When a document changes state from working to review, all reviewers will be notified by this change, and the document will be shown in their Home Screen.

Status	Color	Icon	State	Description
Review - Rejected	Yellow	Review Rejected	Review	This status is shown when the document has the state review and the document has been rejected by one or more of the reviewers. The document can still be approved by the reviews.
Review - Rejected - Not latest	Yellow to red	Review Rejected Not latest	Review	This status is shown when a document is in review state, it have been rejected as described earlier and a newer revision is approved.
Approval	Yellow to green	Approval	Approval	As soon as all reviewers have approved the document, The state of the document is changed to approval. All assigned approvers on the document will be notified, by its existence, and it will now be shown on their Home Screen.
Approval - Rejected - Not latest	Yellow to red	Approval Rejected Not latest	Approval	This Status shows it's rejected, and there is a newer revision of this document available.
Approved	Green	Approved	Approved	A document is given this state, when all approvers have approved the document.
Approved - Working	Green to yellow	Approved Working	Approved	This status is given to a document when there is a newer revision of the document that has working state.

Advanced

The **Advanced options**, as shown in *Figure 23*, allows for the user to do any of the following actions:

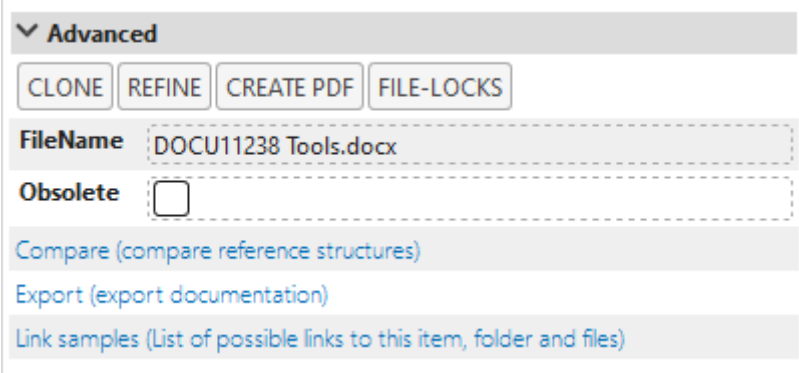

Figure 23 - Advanced options

Feature	Description
Clone	If you wish to clone (branch) a document, click the [Advanced] tab and the [Clone] button. This will create a document with a new ID and a copy of all folder content from the original document.
Refine	The information you entered into Highstage (product etc.) will automatically be written into the document front page, headers and footers as defined by the document type, when sent to review or approval. If you want Highstage to update your document header without sending it to review use the [Refine] button under the [Advanced] tab.
Create PDF	Refine and create PDF in working state. Exact behaviour depends on system setup and customizations. Standard setup will update primary Office files with automatic content and PDF file will be created from frozen state.
FILE-LOCKS	View and kill file locks on folder, sub-folders and containing files.
Edit filename	Modify file-name for the primary file.
Obsolete	Marks the document as *Obsolete*. Documents, that for some reason are not going to appear in Highstage as an active document, can be made obsolete. This could be the case for created documents that are not being completed or document which adheres to outdated processes or procedures. Obsolete documents are not deleted, but merely flagged as such. This change can be reverted. *A description for making a document obsolete is required.*
Compare	Opens a new window
Export	Enables the user to export documents including referenced documents
Link samples	Allows for the user to view and access the specific links for a document or it's prior revisions

Review status

The review status of the document is shown in the Review/Approval Result field. The progress/results of the review/approval process from each of the reviewers/approvers are listed here. Initials, Reject/Accept, Reason/Justification (only used for approval), Comments, Time of approval/reject.

Stop the review process

If you as the author discover an error in the document and you wish to stop the review process you can click the [Change] Button. This will automatically reject the document and signal the reviewers that the review/approval process has been terminated.
After changing the document you may send the document to a new round of review.

Folder options

The *Folder options* shown in Figure 24, are the available features associated with the folders and files of the Document.

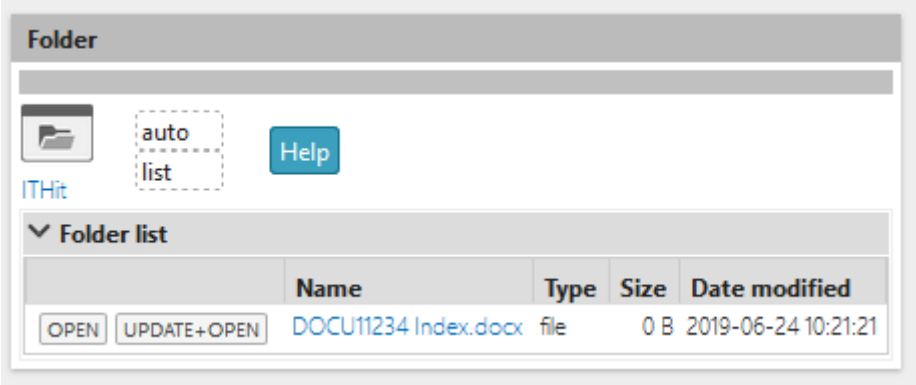

Figure 24 - Show the entire [Folder] tab, where folder type and view settings can be adjusted, under this tab [Folder view] is available.*

Feature	Description
Folder	Opens a folder windows with containing documents
ITHit	Opens a folder view directly in the browser
Auto	Specifies the folder type. The first 2 fields define the view of the folder. By default the component is set to auto, it analyzes which browser and OS that are being used. And chooses the right folder view. If the user is running Microsoft Windows and using internet explorer as browser, [mswebdav] or [msnetwork] should be used. If the user runs any other operating system or browser, [ithitwebdav] must be used.
List	In the second field, the folder settings can be set and controls the view of the folder list. They include the options to specify which things are present in the [Folder view] panel. The setting on the document is set by clicking the second field in the [Folder] tab. After clicking the field, the [Folder setting] will be shown. These settings can be set for each user for all documents they are accessing. This setting is available for system administrators. No matter if the folder settings is set per Document or per User the options available here are: *List*, *List+autolist*, *List+Folder*
Help	Navigates the user to official Highstage documentation
OPEN (Folder list)	Opens the file directly from the server.
UPDATE + OPEN (folder list)	Refines and updates the document and then opens it directly from the server.
Document link	Clicking on the document name opens a 'Read only' version of the document.

> **Multiple files and templates** In case the template exists in both an English and a Danish version both of these will be present in the folder. You may delete the one not used. If the one to be deleted is the one with the document number in the file name, delete it anyway, and then press the [Refresh] button under the [Advanced] tab. This renames the remaining document to the correct name.

Reference options and copy reference to document

The *reference options*, shown in Figure 25, are the available features associated with creating references between documents in Highstage.

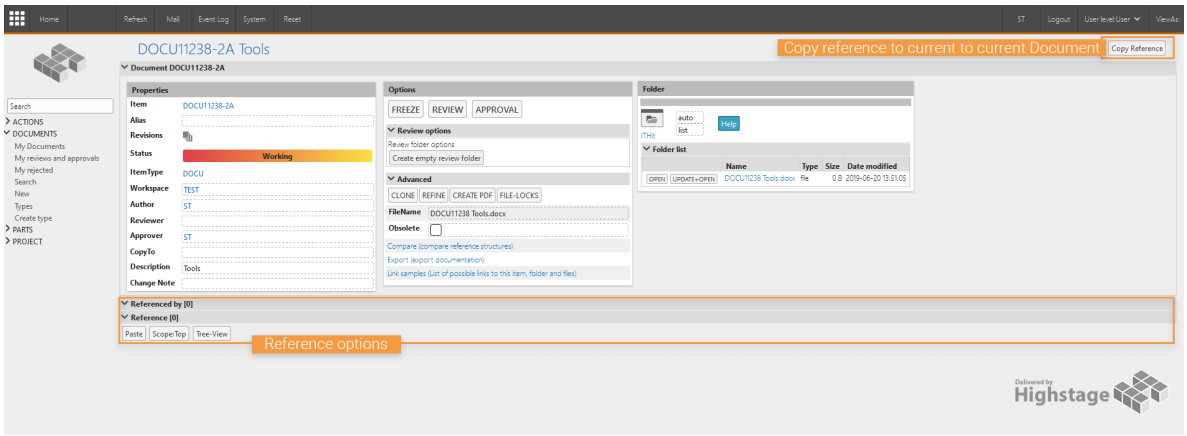

Figure 25 - Reference options

Any Document can have any number of associated referred or *referenced* documents associated with it.

> *Referenced by* indicates the number of documents referring to the current document.

> Reference refers to the number of documents that the current document is referring.

1. To create a reference between documents, click on **[Copy Reference]** on the document which should be referenced *(Document A)*.
2. Navigate to the referring document *(Document B)*.
3. Click on **[Paste]** under 'Reference options'.

The document 'A' will not be referenced by Document 'B', as shown in Figure 26.

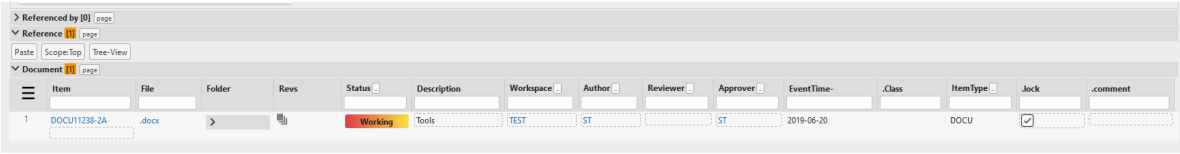

Figure 26 - Document reference

Document approval

When a document is approved by all reviewers it is automatically forwarded for Approval. A mail requiring approvers to approve it is sent. If it is not approved by all, i.e. someone has rejected it, or if someone is late in reviewing you may still send it for approval, overriding the remaining reviews.

In *Figure 27*, the author has approved the document, but is still pending approval from another 'approver'.

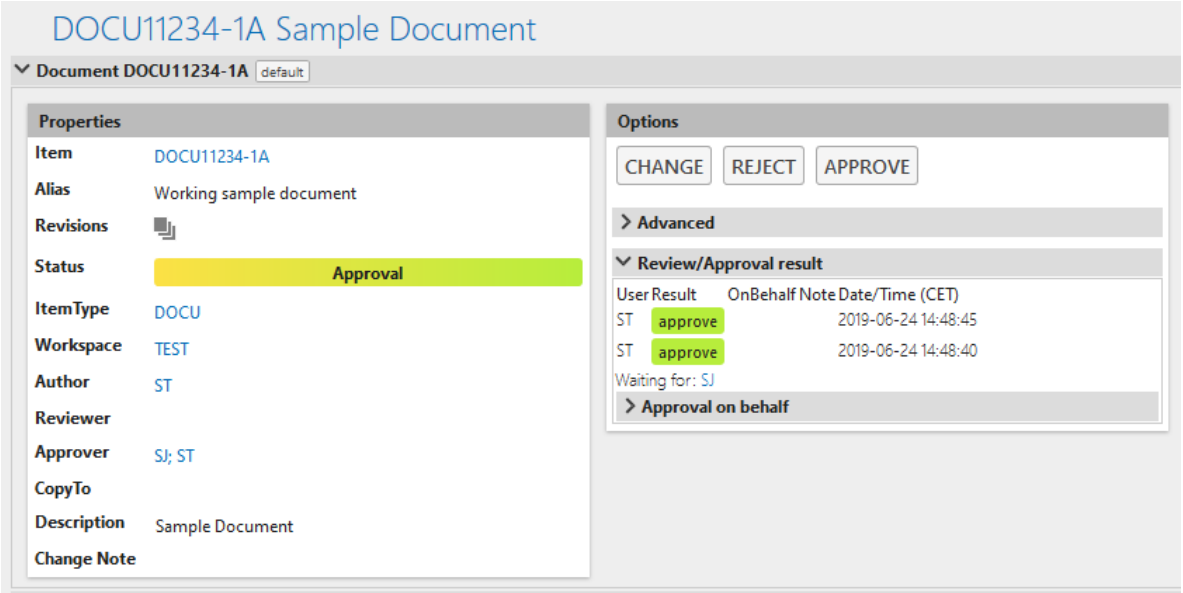

Figure 27 - Document pending approval

> *The [Approve] button will only be present in the document view if you have included yourself in the approve field.*

Approving a document as the author

You may include yourself as an 'approver' whilst being an author of a document. This is done by ensuring that your initials are added to the 'Approver' field under 'Document properties'.

You add yourself as an *Approver* whilst also being the author if you..:

- Want to approve a document yourself (meeting minutes, internal memos etc.)
- Approve a document and have your signature appear in the signature field of the front page of a document.

Approved document

Clicking **[Approve]** will sign the document.

An approved document can be seen in *Figure 28*.

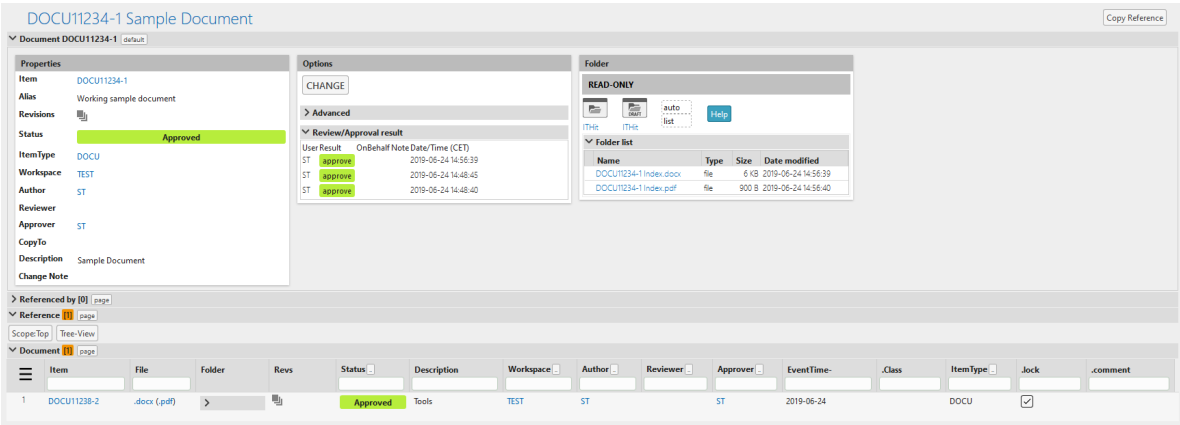

Figure 28 - Approved document

The State have now changed to 'Approved', and the approvers name and approving information will appear in the [Review/Approval result] field.

Other Highstage information

Someone created a document and want you to review or approve it

All documents that are awaiting your action regarding an **Approval** or **Review** can be viewed from the menu: **'My reviews and approvals'**.

This lists, as shown in *Figure 29*, all documents which requires your immediate attention.

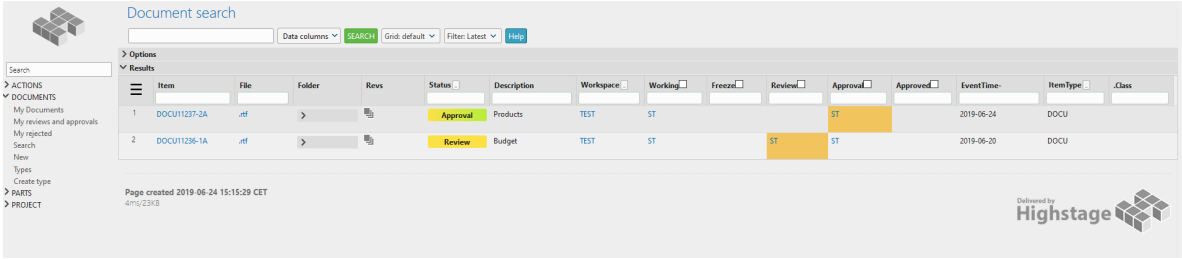

Figure 29 - user revisions and approvals

Once a Document is filed for review or approval, the users assigned for it's review or approval will be notified immediately by e-mail.

This email will contain a link, redirecting the user directly to the specific document.

Similarly, the document will appear in the 'My reviews and approvals' until approved or rejected by the appropriate users.

Awaiting Review

Accessing the pending document, either through the link from the e-mail or from the 'My reviews and approvals', all **reviews** awaiting you accept, will be listed in this window.

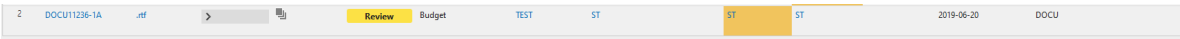

Figure 30 - Pending review requires users' action

The field under the review column will be colored yellow, with the users username listed in the column. By clicking the document number to the left, you will be directed to the review window for the particular document.

Awaiting Approval

Accessing the pending document, either through the link from the e-mail or from the 'My reviews and approvals', all **Approvals** awaiting you accept, will be listed in this window.

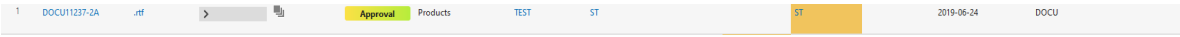

Figure 31 - Pending approval requires user action

The field under the approval column will be colored yellow to green, with the users username listed in the column. By clicking the document number to the left, you will be directed to the approval window for the particular document.

Changing author of a Document

The authors are the only users that have write access to the document. If other users need write access to a document they must be added to the author list by the author.

Adding or changing author for a document in *Working* state

Gaining access to a document requires an existing author to grant you access, and thereby permission to view and edit the document.

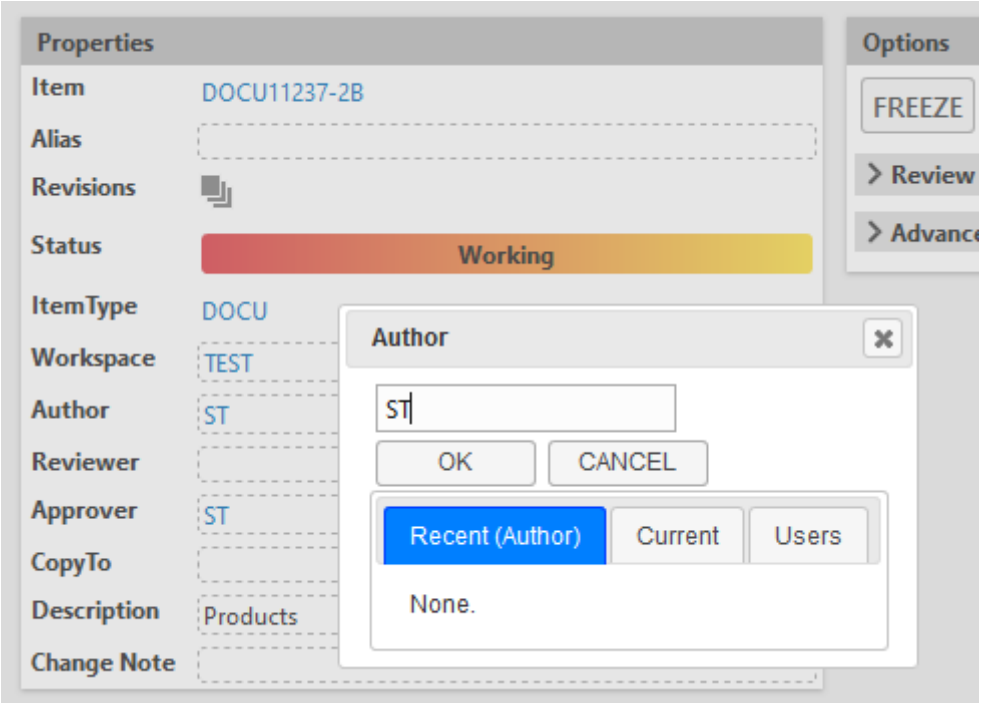

Figure 32 - Modifying authors

This action can be done by letting the original author go to the document, clicking in the author field, as shown in *Figure 32*.

Here, the author have the option to see which other users there are assigned to the document, and assign new authors by clicking on the individual user in the [Users] tab.

It is also possible just to write the initials of another user in the input field in the top of the window.

Adding or changing author for document in *Review / Approval* state

Author access may be gained from the document page of documents in either APPROVAL, REVIEW or APPROVED state by expanding the [+Advanced] section and clicking [Change], as shown in *Figure 33*.

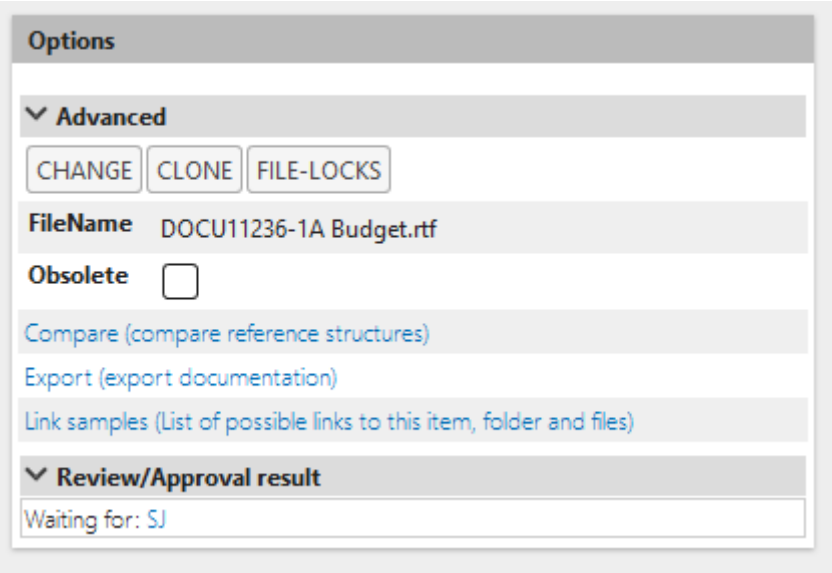

Figure 33 - Advanced action to create a new version of a document in review/approval where the user will be added as an author.

> Be careful with this since you might take over a document which the existing author has sent for review acceptance or approval and is waiting for that action.

This will create a new version of the document and put the document in the Full Access (Read/Write) state. Now the user is included in the author list. And Highstage have created a new revision for the document and made a reference back to the original document.

Multiple files in the document folder

If you have one or more documents or other files associated with the main document you may include these in the main document folder simply by copying and pasting it into the folder view. The associated files will follow the document in case of update to a new version.

If you prefix the filename with the document ID, e.g. UG10002-App1.doc Highstage will add the revision number when approved e.g. UG10002-1-App1.doc. This can be an advantage in some cases but it prohibits the use of relative link from the main document as the filename changes.

Event-log

The Event-log describes all actions and changes associated with a Document. It can be assecced directly from the *Document view* and opens a new window with the logged information, as shown in *Figure 34*.

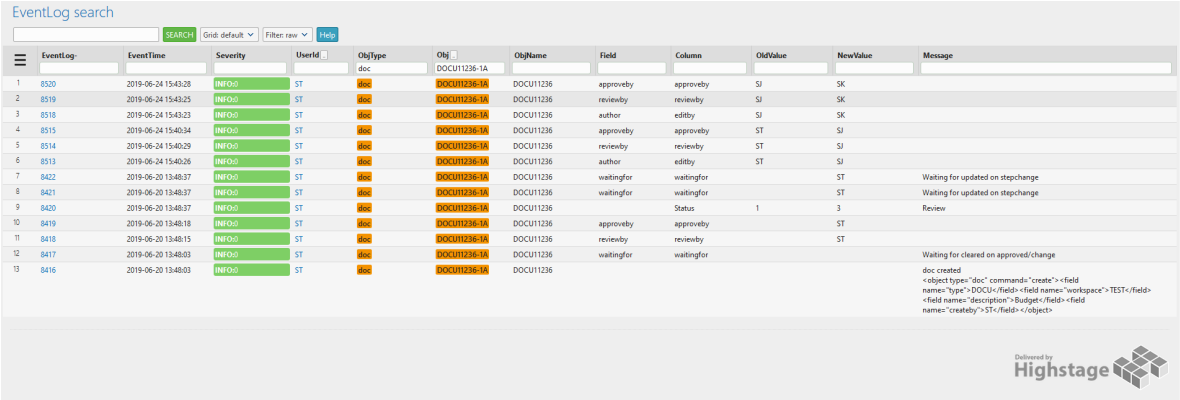

figure 34 - Document event-log

Document revisions

The *Revisions* provides a complete view of the revisions of a Document.

The view can be accessed from any document view, as shown in *Figure 35*.

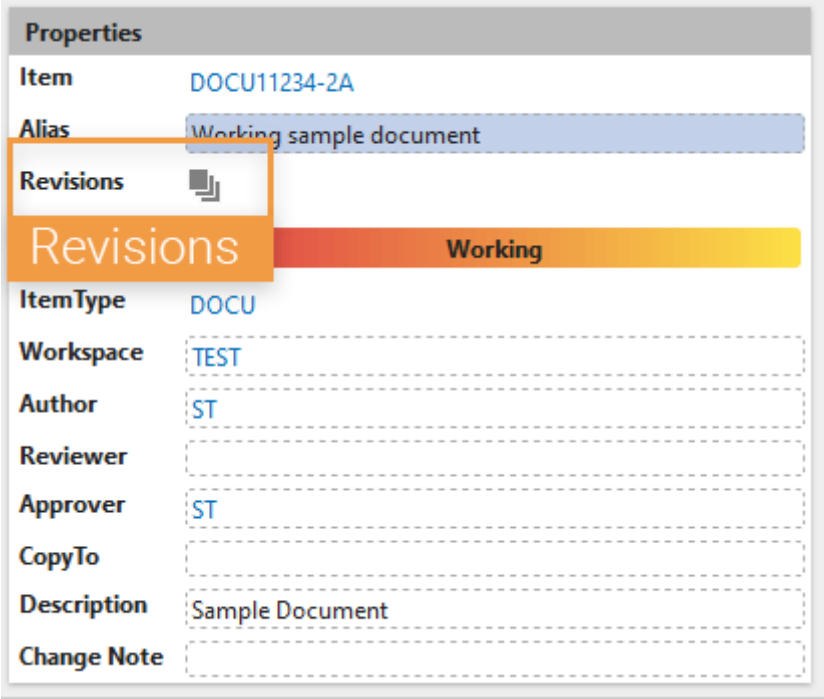

Figure 35 - Revision access from Document properties

Clicking on the *Revisions* icon will navigate the user to a list-view of all revisions of a specific document, as shown in *Figure 36*.

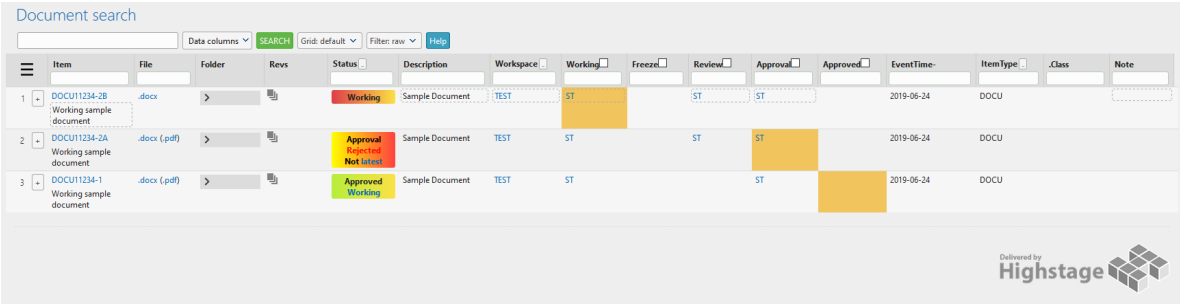

Figure 36 - Document revision log

Highstage