

REDIS.win

Web portal

Version 7.0.0

September 2021

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1. Web portal

The web portal is only available in connection with the REDIS Web.Followup module.

1.1. System requirements

In order to be able to use the web portal optimally, you need Microsoft Internet Explorer version 9 or higher.

1.2. Roles and permissions

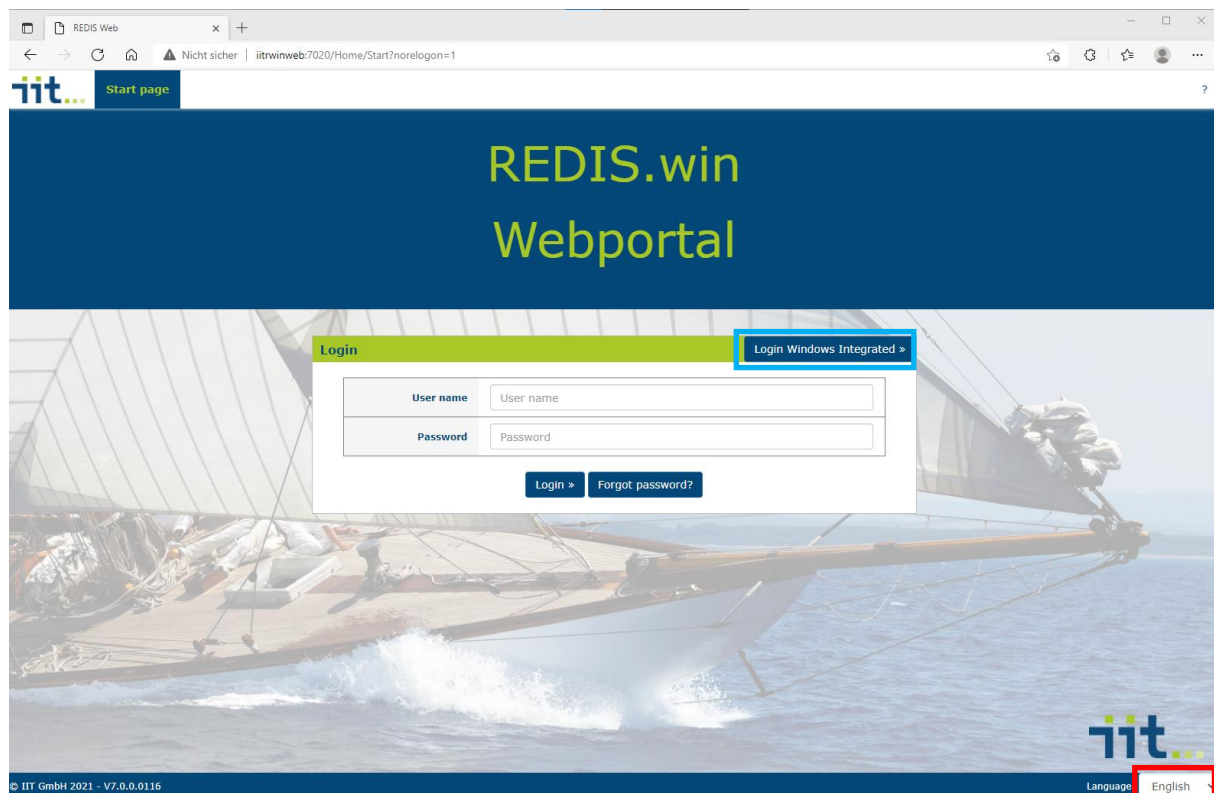
The roles and the authorization concept have only been changed insignificantly, i.e. in most cases the client users can remain unchanged. There are two changes, however:

- For users to whom only the role AuswertungMandant is assigned, this must be replaced by the role FeststellungenMaßnahmenMandantLesen.
- User administration is not possible in the web portal, that means the AdministrationMandant role is not supported here. Either users with the AdministrationMandant role continue to receive a client or the user administration for the audited positions is carried out on the audit side.

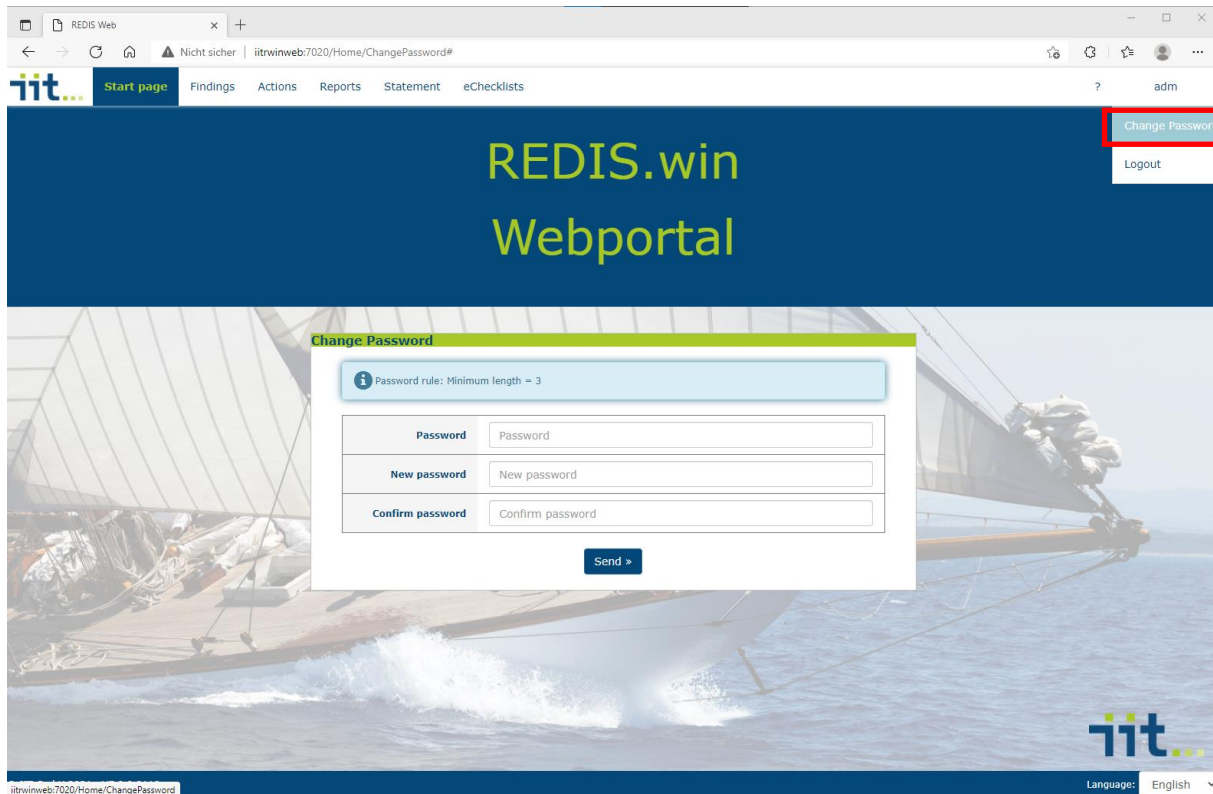
1.3. Login

When logging in, a distinction is made between Windows-integrated and non-Windows-integrated users. For Windows-integrated users, the web portal is opened directly or by clicking on the button *Login Windows Integrated* (light blue marking). A login dialog for logging in is displayed for the other users.

At the bottom right there is a selection field for language selection (red marking). The languages Deutsch (DE) and English (EN) are available. The language set on the respective browser is used as the default setting. A new password for logging in can be requested by clicking the "Forgot password" button.



Clicking on *Change password* (red marking) expands the login dialog and offers the option of storing a new password. The structure of the password can be influenced by configuration settings. These are described in detail under point 1.4



1.4. Configuration

Configurations are not possible directly in the web portal!

1.4.1. Options to configure the password

The structure of the passwords can be controlled via four configuration elements. These are located in the Config. Category under *General – General*.

The following configuration settings are possible:

- Minimum length of the password.
- Enable that passwords must contain numbers.
- Enable that passwords must contain letters.
- Enable that passwords must contain special characters.

Both initial passwords and the subsequently changed passwords must correspond to the configured password specifications. Non-compliant passwords are not accepted and mean that a new, compliant password has to be entered when logging in.

The settings of the configuration elements are described in Part I of the manual for administrators.

1.4.2. Configuration of email with approval rights

The text of the automatic access mail is configured in the desktop client.

It is influenced by two configuration elements:

- Default email text new user
- System email REDIS.win

The configuration element *Default email text new user* defines the text body of the sent email.

The configuration element *system email REDIS.win* shows either the installation folder for the desktop client or the web address of the web portal.

1.5. Function print against templates

In the web portal, it is possible to print an overview of the findings and measures against an Excel or Word template.

Printing against a Word template is integrated for detail pages.

The used Excel and Word templates are both stored in the REDIS.win print templates and can be adapted by the revision via the desktop client.

Please note the following:

- The templates must be formatted in Office 2007 or higher format (* .docx or * .xlsx)
- The templates stored by default contain all fields in REDIS. If individual fields have been configured out of the configuration or are not visible for the auditee via the extended status management, the templates must be adapted. The placeholders for these fields must be removed from the Word or Excel files.

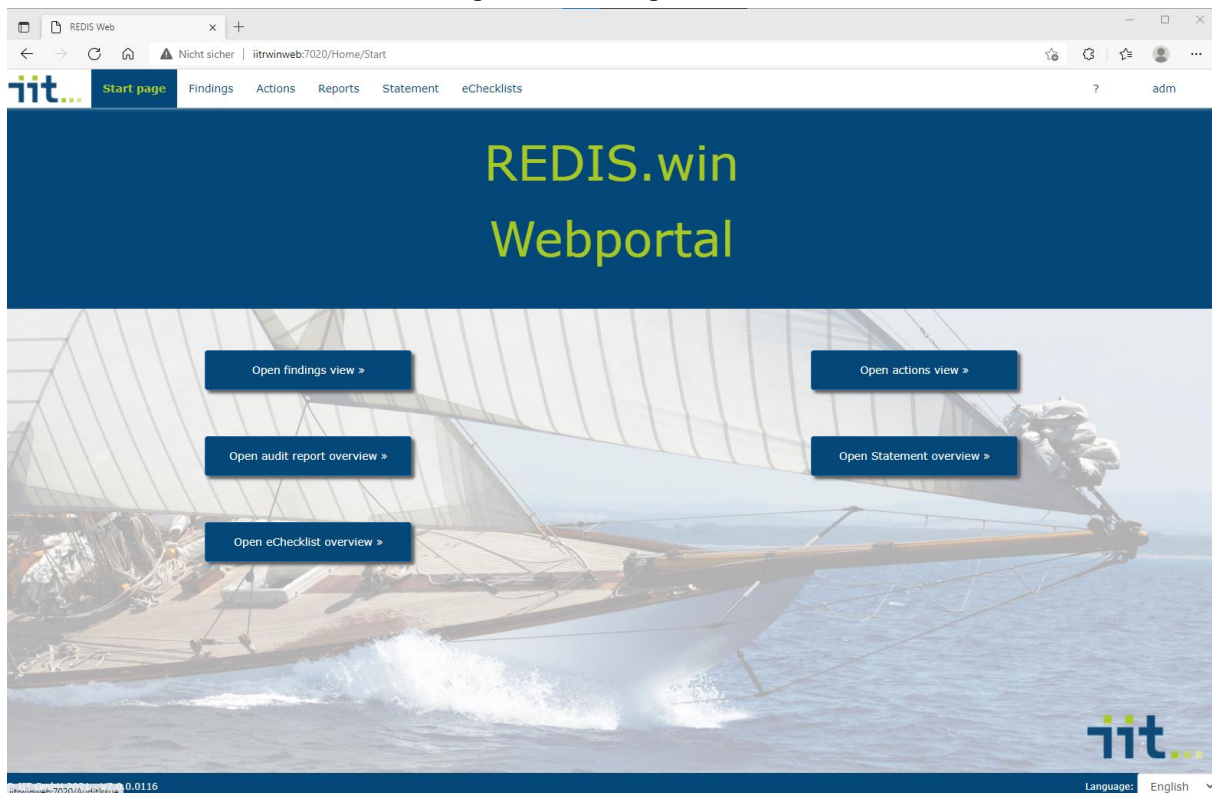
Note!

It is strongly recommended to make backup copies of the standard templates and only then to start adapting the templates.

2. Overviews

2.1. Options in the overview

After logging in, you can branch to the desired overview by clicking on the respective Overview button or by clicking on the menu entry. Which button and menu entries are shown depends on the authorization of the user and the configuration settings.



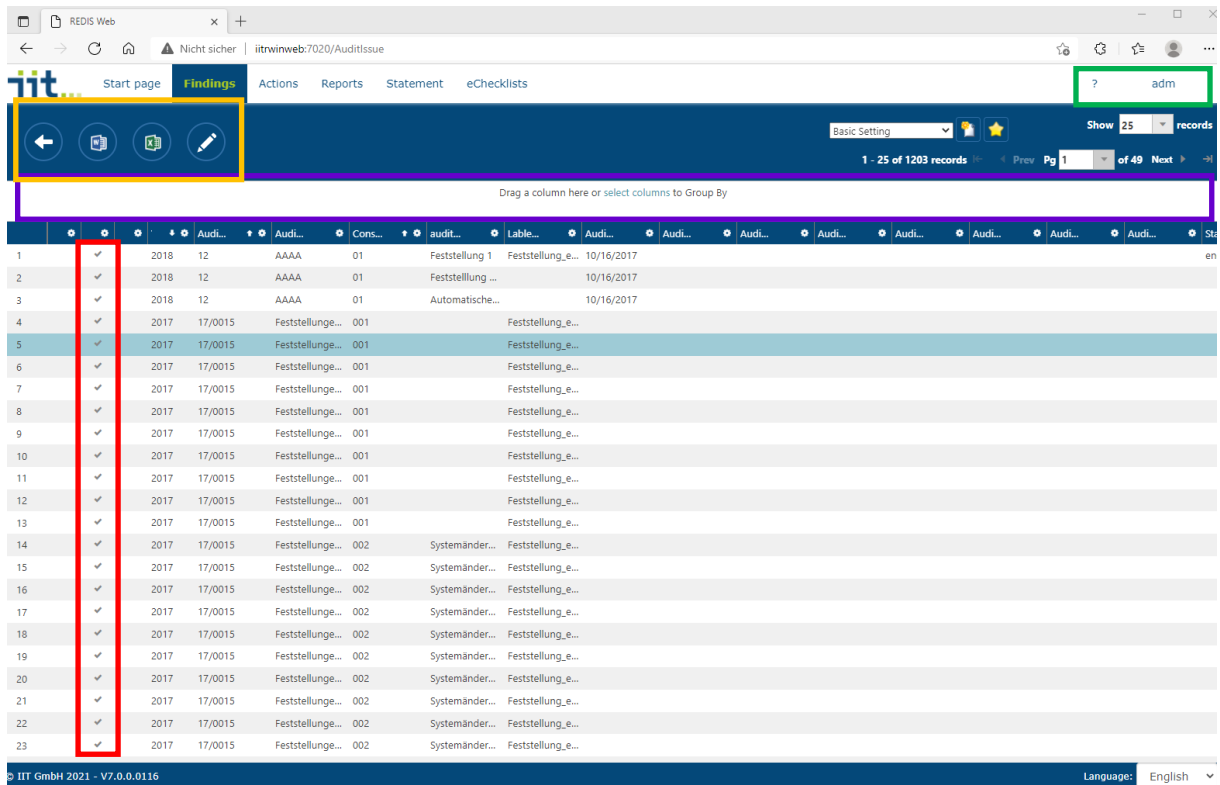
2.2. Findings overview

This overview lists all the findings released for the auditee. This can be recognized by the tick in the third column from the left (**red marking**). Findings that have in turn been approved by the auditee are also marked with a tick in the fourth column from the left.










At the top left there are buttons for printing against a Word or Excel template and for leaving the page (**orange marking**)


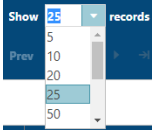
The columns can be sorted by clicking on the column labels. The order of the columns can be changed by dragging and dropping the column headers. By dragging a column header into the grouping field (**purple marking**), the data display is grouped according to the characteristics of the column.

You can log out by clicking on the currently logged in user (**green marking**). To the left of it is the help button (?).






Overview buttons

Button	Function
 	Clicking on the button showing the user name enables the user to log out of the web portal.
	Opens the help file in the language selected in the login. The help file must be in .pdf format and stored in the Help folder. The Help folder is located in the root directory of the IIT REDIS.web application. The name of the help file follows a naming convention. The name must be structured as follows: <ul style="list-style-type: none"> „Help_RedisWeb_de.pdf“ for German. „Help_RedisWeb_en.pdf“ for English.
	The back button enables you to return to the previous page from an overview or detail page.
	Next to the button of the start page (findings or actions) there are buttons for changing the overviews. Whether actions are displayed depends on the configuration.
	The print buttons start print jobs against a Word or Excel template. After clicking one of the two buttons, the browser displays a dialog for opening or saving the file (depending on used browser).
	Opens the selected data record in edit mode.
	Depending on whether the actions object is activated or not, this button is displayed either on the Findings overview or the Actions overview. A click on the button delegates the selected data record. Provided the user has the necessary authorization and a delegate has been entered.
	Depending on whether the Actions object is activated or not, this button is displayed either on the Findings overview or the Actions overview. A click on the button delegates the selected data record to the revision with the authorization to release it. Provided the user has the required authorization and a delegate has been entered.

Button	Function
	Depending on whether the Actions object is activated or not, this button is displayed either on the Findings overview or the Actions overview. A click on the button by the delegate returns the finding / action to the next higher level.
	With the selection list for the number of data records displayed per page, the desired count of entries can be selected from the list.
Drag a column here or select columns to Group By	Clicking the Select columns link opens the Column grouping dialog. Several columns can be selected for grouping here.

Overview column filter

Button	Function
	Clicking the icon opens the column filter.
 Hide	Clicking the Hide button hides the selected column.
 Column Chooser	Clicking the Column Chooser button opens a selection dialog. Here you can change the display or hide (red marking) of the columns by clicking on them. With the Reset button (orange marking), this is only visible if at least one column is hidden, all columns can be made visible again. The change only takes place when you exit using the Apply button (green marking) or is discarded when you exit using the Cancel button (green marking).

Reset

Hide Locked by

Show Release for FollowUp

Hide Back in audit

Hide Year

Hide Audit number

Hide Audit title

Hide Consecutive number

Hide audit issue title

Hide Lable Audit issue

Hide Auditissuedate1

Hide Auditissuedate2

Hide Auditissuedate3

Hide Auditissuedate4

Hide Auditissuedate5

Hide Auditissuedate6

Hide Auditissuedate7


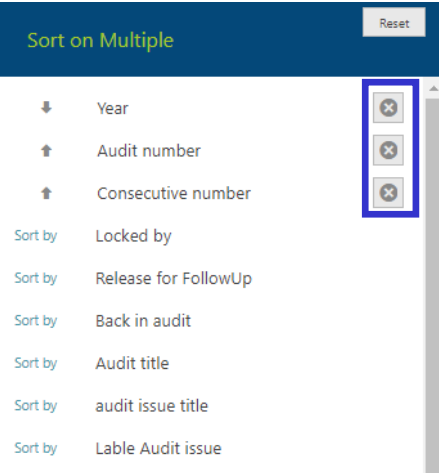

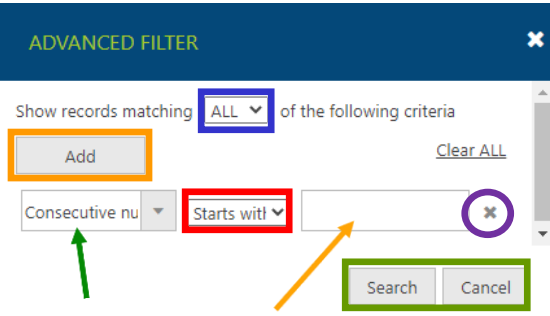

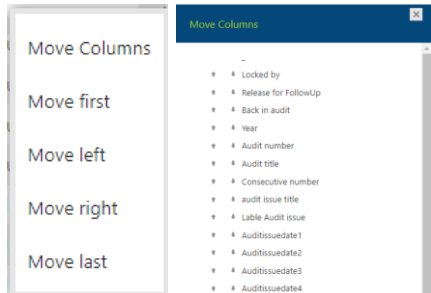
Hide Auditissuedate8

Hide Status

Hide AuditissueStatus2

Hide AuditissueStatus3

Apply **Cancel**

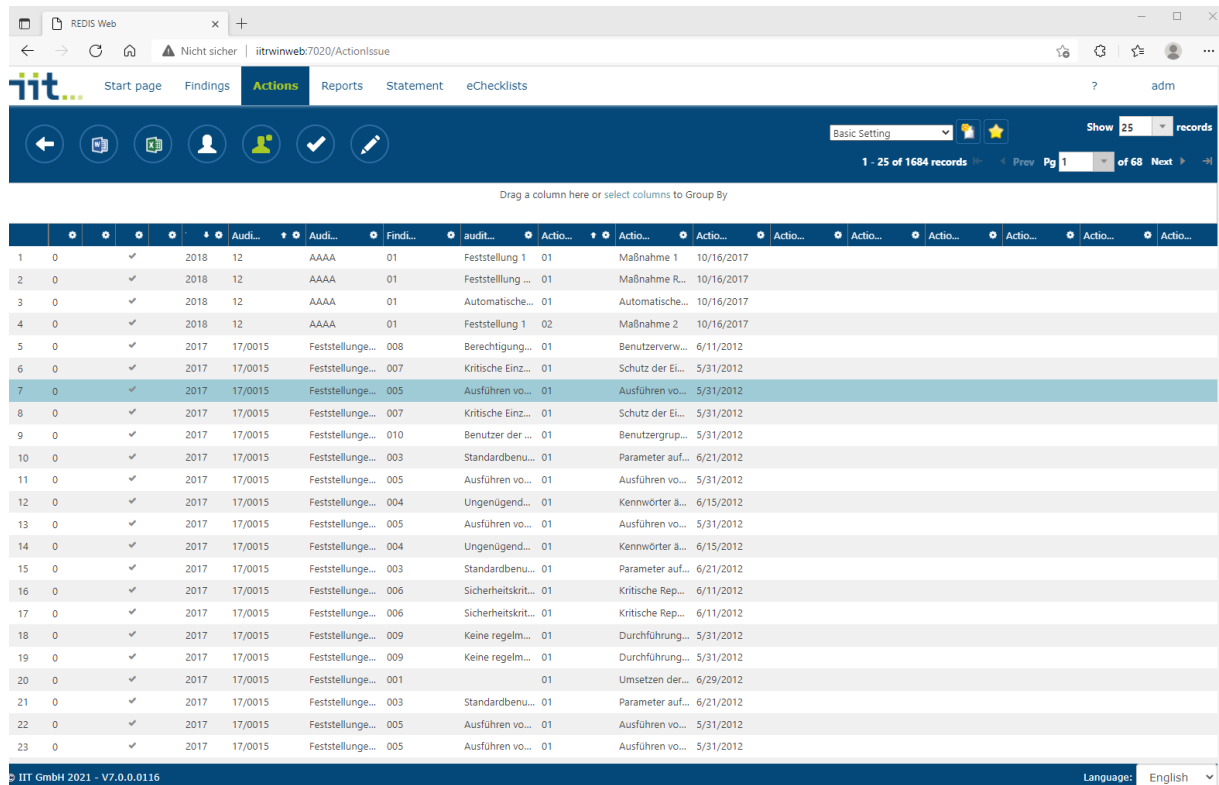
Button	Function
 <p>Sort on Multiple</p>	<p>Clicking the Sort on multiple button opens a selection dialog. A column can be sorted here by clicking on Sort by. By default, it is sorted in ascending order first, then in descending order by clicking again. Sorting for the year is descending by default. Clicking on the X cancels an individual sorting (blue marking).</p> 
 <p>Advanced Filter</p>	<p>Clicking the Advanced Filter button opens a dialog.</p> <p>With <i>Show records matching ... of the following criteria</i> – by selecting <i>ALL</i> or <i>ANY</i> - (blue marking) the scope is determined.</p> <p>The dialog has three input fields for each filter setting:</p> <ol style="list-style-type: none"> 1. the field to be filtered (green arrow) 2. a selection list of the possible filter settings depending on the data type (red marking) 3. the value to be filtered (orange arrow). <p>The button <i>Add</i> adds another filter setting (orange marking).</p> <p>A single filter setting can be removed from the dialog by clicking the X (purple circle). All filter settings are removed by clicking the <i>Clear ALL</i> button. The button <i>Search</i> (green marking) applies the settings and closes the dialog. The button <i>Cancel</i> (green marking) closes the dialog without applying a filter.</p> <p>Note!</p> <p>It is not possible to filter on the columns Locked by and Numeric Field.</p> 
 <p>Move To</p>	<p>Clicking this <i>Move to</i> button opens a context menu. The selection <i>Move columns</i> opens a dialog for moving the columns.</p> 

2.3. Overview Actions

The display of the actions overview depends on whether the configuration element Activate actions is set.

The controls in the actions overview correspond to those in the Findings overview.

All actions released for the client are listed. Double-click on the action to open the detail page of the action in read mode.

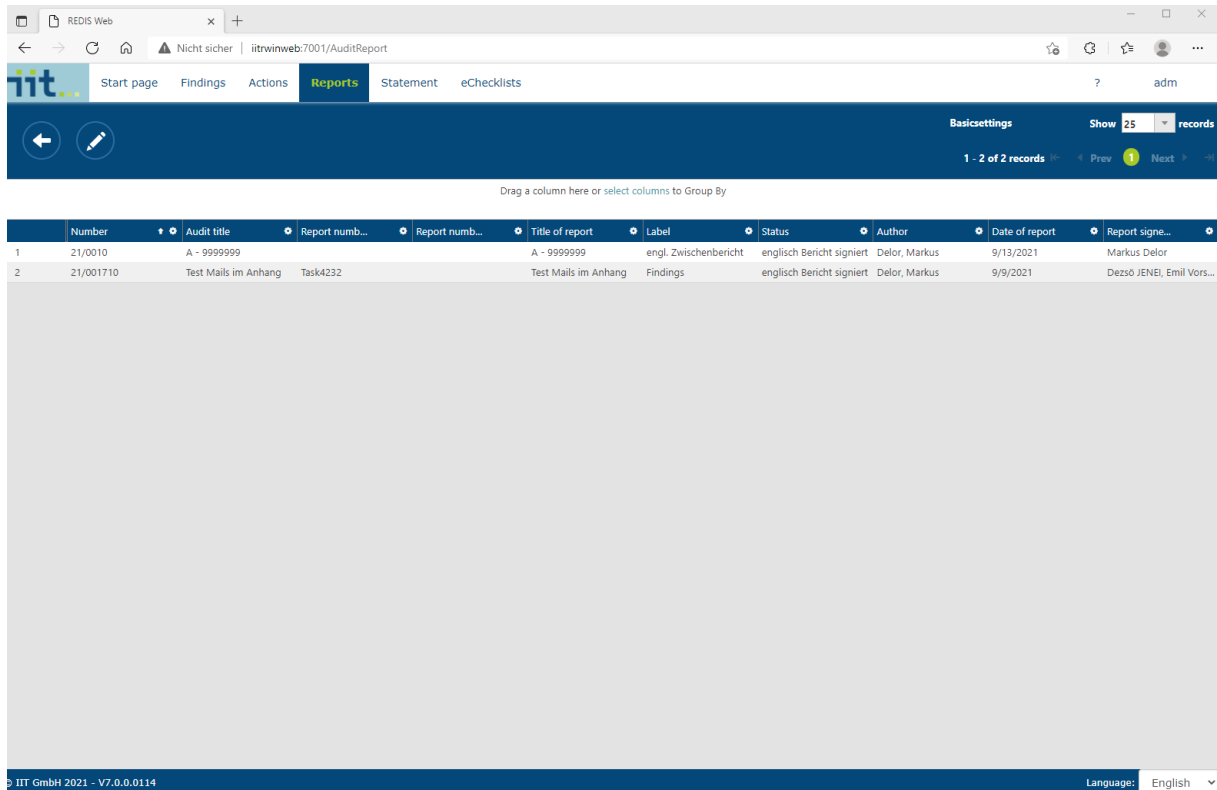


ID	Status	Date	Finding ID	Action ID	Action Name	Date
1	0	2018	12	AAAA 01	Feststellung 1	10/16/2017
2	0	2018	12	AAAA 01	Feststellung ...	10/16/2017
3	0	2018	12	AAAA 01	Automatische...	10/16/2017
4	0	2018	12	AAAA 01	Feststellung 1	10/16/2017
5	0	2017	17/0015	Feststellung... 008	Berechtigung...	6/11/2012
6	0	2017	17/0015	Feststellung... 007	Kritische Einz...	5/31/2012
7	0	2017	17/0015	Feststellung... 005	Ausführen vo...	5/31/2012
8	0	2017	17/0015	Feststellung... 007	Kritische Einz...	5/31/2012
9	0	2017	17/0015	Feststellung... 010	Benutzer der ...	5/31/2012
10	0	2017	17/0015	Feststellung... 003	Standardbenu...	6/21/2012
11	0	2017	17/0015	Feststellung... 005	Ausführen vo...	5/31/2012
12	0	2017	17/0015	Feststellung... 004	Ungenügend...	6/15/2012
13	0	2017	17/0015	Feststellung... 005	Ausführen vo...	5/31/2012
14	0	2017	17/0015	Feststellung... 004	Ungenügend...	6/15/2012
15	0	2017	17/0015	Feststellung... 003	Standardbenu...	6/21/2012
16	0	2017	17/0015	Feststellung... 006	Sicherheitskrit...	6/11/2012
17	0	2017	17/0015	Feststellung... 006	Sicherheitskrit...	6/11/2012
18	0	2017	17/0015	Feststellung... 009	Keine regelm...	5/31/2012
19	0	2017	17/0015	Feststellung... 009	Keine regelm...	5/31/2012
20	0	2017	17/0015	Feststellung... 001		6/29/2012
21	0	2017	17/0015	Feststellung... 003	Standardbenu...	6/21/2012
22	0	2017	17/0015	Feststellung... 005	Ausführen vo...	5/31/2012
23	0	2017	17/0015	Feststellung... 005	Ausführen vo...	5/31/2012

2.4. Overview Reports

The operating elements of the Reports overview are reduced to the Back and Edit buttons as described in the Findings overview.

All reports released for the client are listed. With a double click on the report the detail page of the report is opened in read mode.



Drag a column here or select columns to Group By

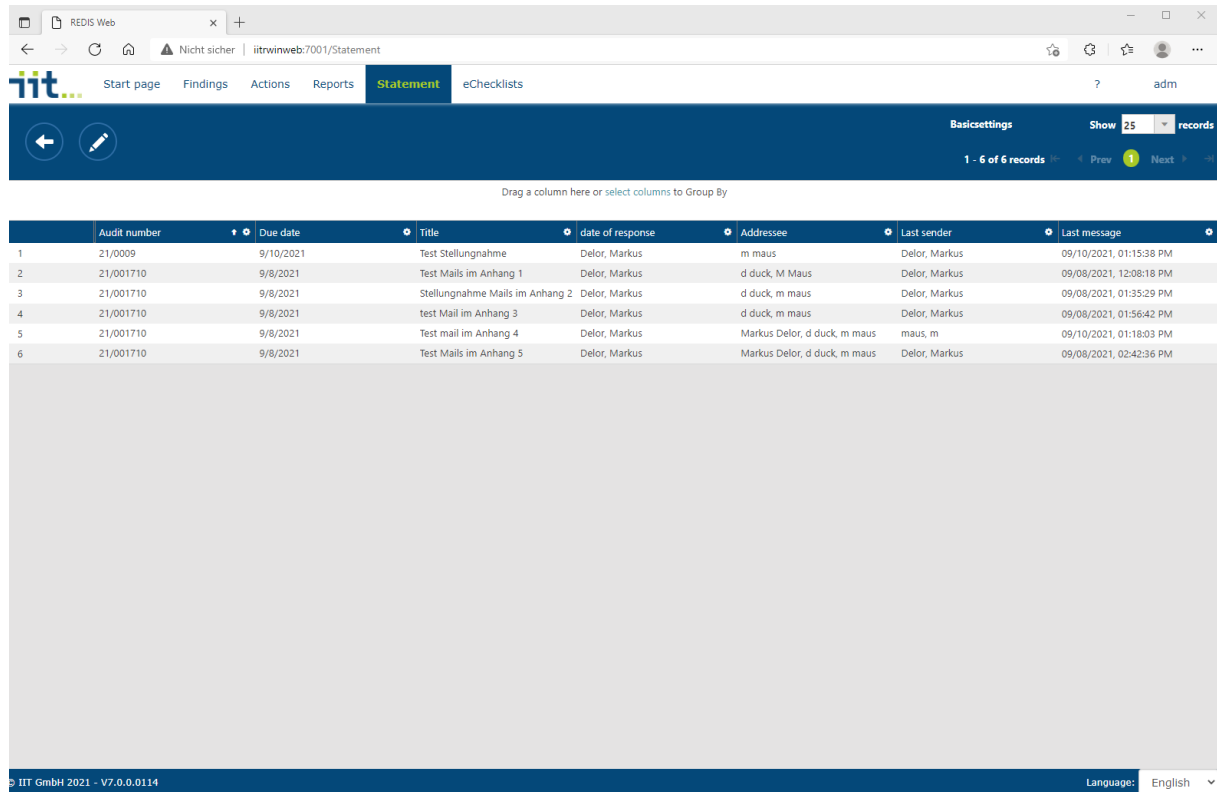
Number	Audit title	Report numb...	Report numb...	Title of report	Label	Status	Author	Date of report	Report signe...
1	A - 9999999			A - 9999999	engl. Zwischenbericht	englisch Bericht signiert	Delor, Markus	9/13/2021	Markus Delor
2	Test Mails im Anhang	Task4232		Test Mails im Anhang	Findings	englisch Bericht signiert	Delor, Markus	9/9/2021	Dezso JENEI, Emil Vors...

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2.5. Overview Statement

The operating elements of the statements overview are reduced to the Back and Edit buttons as described in the statements overview.

All statements released for the client are listed. Double-click on the statement to open the detail page of the statement in read mode.



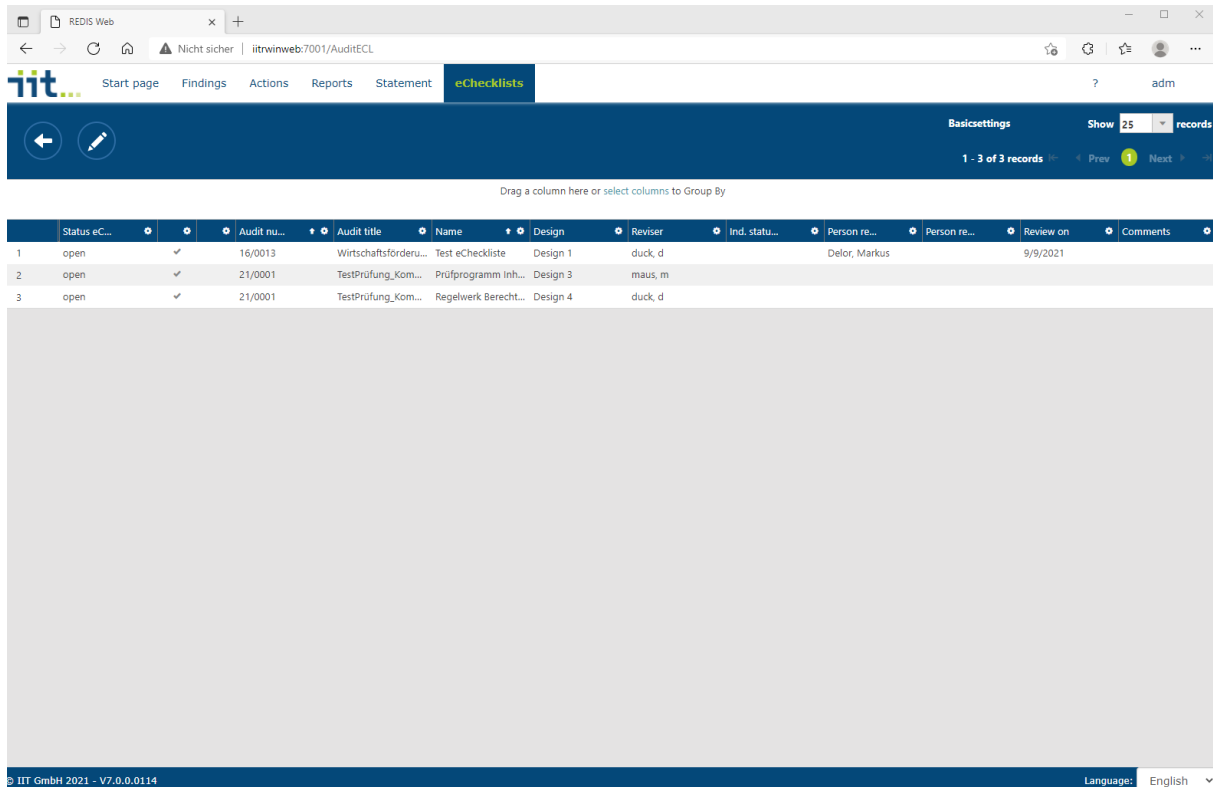
The screenshot shows a web browser window with the URL `itwinweb7001/Statement`. The interface includes a navigation menu with 'Statement' selected, a 'Basic settings' section, and a table of 6 records. The table columns are: Audit number, Due date, Title, date of response, Addressee, Last sender, and Last message. The footer shows 'IIT GmbH 2021 - V7.0.0.0114' and 'Language: English'.

	Audit number	Due date	Title	date of response	Addressee	Last sender	Last message
1	21/0009	9/10/2021	Test Stellungnahme	Delor, Markus	m maus	Delor, Markus	09/10/2021, 01:15:38 PM
2	21/001710	9/8/2021	Test Mails im Anhang 1	Delor, Markus	d duck, M Maus	Delor, Markus	09/08/2021, 12:08:18 PM
3	21/001710	9/8/2021	Stellungnahme Mails im Anhang 2	Delor, Markus	d duck, m maus	Delor, Markus	09/08/2021, 01:35:29 PM
4	21/001710	9/8/2021	test Mail im Anhang 3	Delor, Markus	d duck, m maus	Delor, Markus	09/08/2021, 01:56:42 PM
5	21/001710	9/8/2021	Test mail im Anhang 4	Delor, Markus	Markus Delor, d duck, m maus	maus, m	09/10/2021, 01:18:03 PM
6	21/001710	9/8/2021	Test Mails im Anhang 5	Delor, Markus	Markus Delor, d duck, m maus	Delor, Markus	09/08/2021, 02:42:36 PM

2.6. Overview eChecklists

The operating elements of the eChecklists overview are reduced to the Back and Edit buttons as described in the Findings overview.

All eChecklists released for the client are listed. A double click on the eChecklists opens the details page of the eChecklist in read mode.



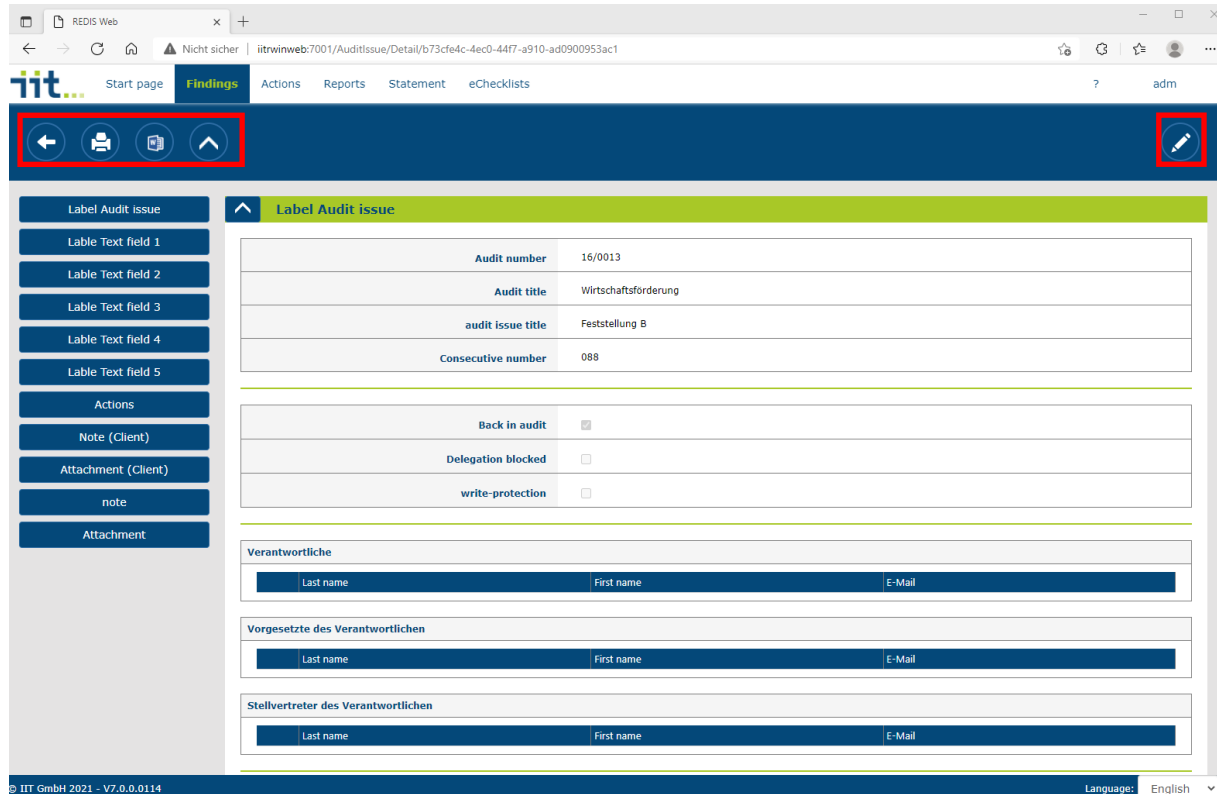
The screenshot shows a web browser window displaying the 'eChecklists' overview page. The browser address bar shows 'iitrwinweb:7001/AuditECL'. The page header includes navigation links: Start page, Findings, Actions, Reports, Statement, and eChecklists. The user is logged in as 'adm'. The page displays a table with 3 records. The table columns are: Status eChecklist, Audit nu..., Audit title, Name, Design, Reviser, Ind. statu..., Person re..., Person re..., Review on, and Comments. The records are numbered 1, 2, and 3.

Status eChecklist	Audit nu...	Audit title	Name	Design	Reviser	Ind. statu...	Person re...	Person re...	Review on	Comments
1 open	16/0013	Wirtschaftsforderu...	Test eCheckliste	Design 1	duck, d		Delor, Markus		9/9/2021	
2 open	21/0001	TestPrüfung_Kom...	Prüfprogramm Inh...	Design 3	maus, m					
3 open	21/0001	TestPrüfung_Kom...	Regelwerk Berecht...	Design 4	duck, d					

3. Detail pages

3.1. Detail Findings in Web portal

This detail page is intended for the audited unit and is only visible with the client-related roles " FollowUp Beauftragter (Mandant)", " Feststellungen/Maßnahmen lesen (Mandant)" and the "Administrator" role. The revision does not have access to this page. The various areas can be selected using the navigator on the left.



Overview buttons in read only mode

Button	Function
	Puts the detail page in edit mode.
	Unlocks the current record. This button only appears if the data record is locked by the logged in user.
	Closes the details page without saving.
	Prints the page.
	Prints against a Word template. After clicking the button, the browser displays a dialog at the bottom of the screen.
	Shows or hides all details on the detailed overview.

If the detail page has been switched to edit mode, the display changes in relation to the buttons.

Depending on whether the configuration element Activate actions is set, the follow-up takes place either on the basis of the actions or the findings.

The following figure shows the situation when the configuration element is not activated, so that the follow-up is based on the findings. The FollowUp buttons appear in the finding.

The screenshot shows the 'Label Audit issue' page in edit mode. The sidebar on the left contains buttons for 'Label Audit issue', 'Label Text field 1' through '5', 'Note (Client)', 'Attachment (Client)', 'note', and 'Attachment'. The main content area displays audit details: Audit number (16/002310), Audit title (Test Prüffelder), audit issue title (Keine Berechtigungsprüfung auf das Objekt S_TCODE), and Consecutive number (001). Below this are checkboxes for 'Back in audit', 'Delegation blocked', and 'write-protection'. The 'Responsible Unit' section shows a table with one entry: '1 Sonnenschein AG' with email 'info@iit-gmbh.de'. The 'Responsible Department' section has buttons for 'Delete', 'Input', and 'Client' and a table with columns for 'Last name', 'First name', and 'E-Mail'. The bottom navigation bar contains icons for back, forward, close, save, and user management, with the save and user management icons highlighted in a red box.

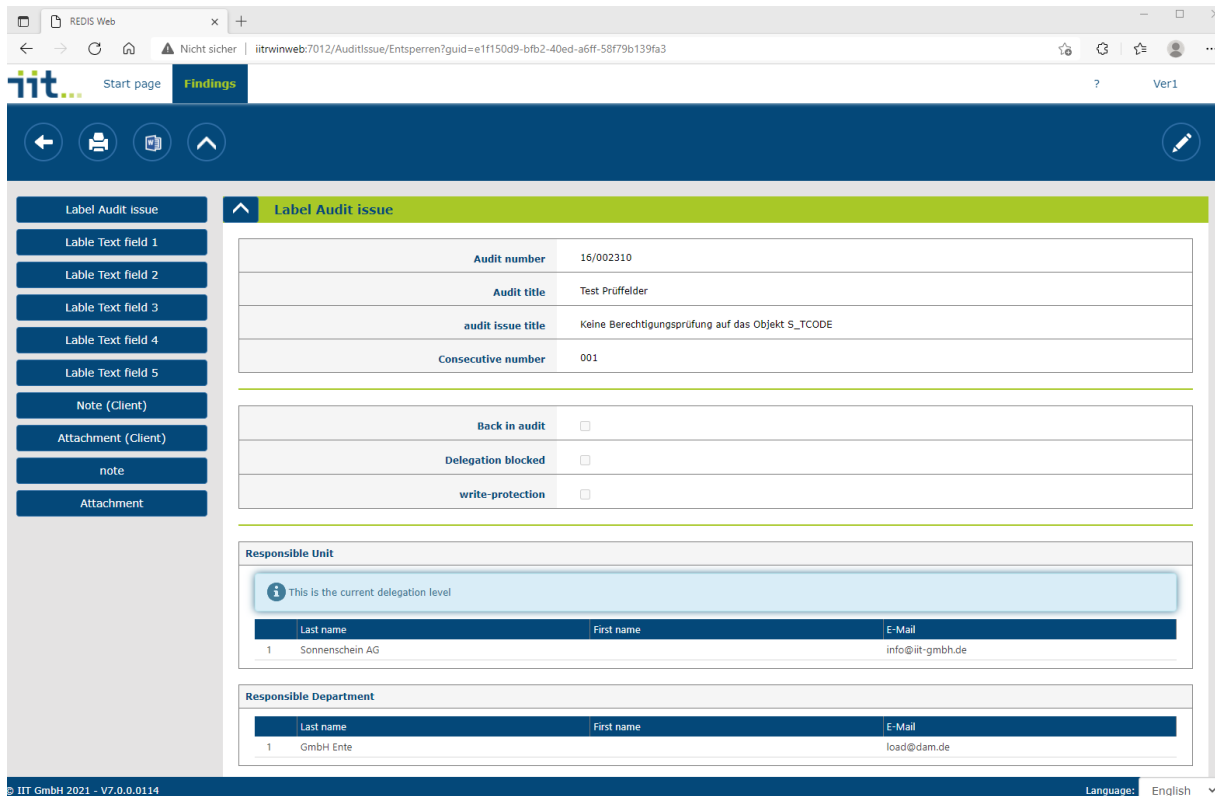
Overview buttons in edit mode

Button	Function
	Saves the detail page. The page is then in read mode.
	Saves and closes the detail page.
	Closes the details page without saving.

Overview Buttons FollowUp functionalities

Button	Function
	Release to revision
	Delegation
	Delegation with release rights
	Report of completion from the delegate to the delegator.

If the auditee has released the finding to the revision, the FollowUp buttons are no longer displayed and the finding can only be opened in read mode.



With the appropriate configuration and authorization for the delegation, the auditee can add further persons responsible. It is possible to add free text entries, addresses can be taken from the Outlook contacts or a client can be selected.

The currently responsible or delegated position is marked with an information box.

Responsible Unit		
<div style="border: 1px solid #ccc; background-color: #e6f2ff; padding: 5px; display: flex; align-items: center;"> i This is the current delegation level </div>		
Last name	First name	E-Mail
1 Sonnenschein AG		info@iit-gmbh.de

Responsible Department		
Last name	First name	E-Mail
1 GmbH Ente		load@dam.de

Deputy		
Last name	First name	E-Mail

Navigator findings

The audit number and audit title fields are filled in by the system.

The fields title of the finding and consecutive number are text fields. The fields audit issue title, status, classification, audit issue criteria 1 to 4 are configuration-dependent. The Auditor field shows the auditor who made this finding.

The editing options for the date fields by the client are configuration-dependent. Authorized persons can either enter a date manually or use the stored calendar.

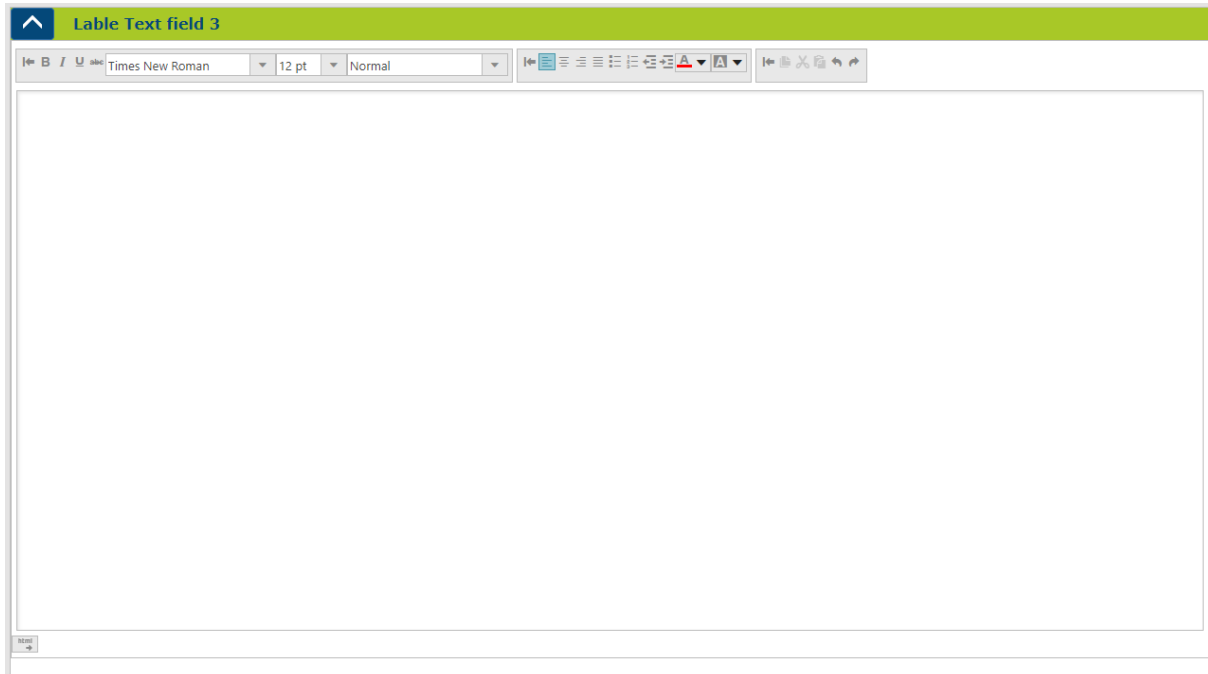
The responsible person and the delegation options can be found in the fields for those responsible. The labeling of the responsible persons can be changed in the configuration. The Responsible 1 field is always filled in by the revision. In the fields Responsible 2 and Responsible 3, additional persons or clients can be entered, to whom the finding can then be delegated. Whether the user can delegate depends on the configuration and the respective rights of the user.

Note!

With the FollowUp module, only one responsible person can be entered in the responsible person 1 to 3 fields.

Navigator text fields

A total of twelve text fields are available for entering texts. Configurable settings define individual labels and text fields that can be edited by the revision or the audited unit.



Navigator actions

The entry is only visible in the Navigator if the configuration element Activate actions is set.

For a finding, all assigned actions can then be viewed in a list. The selected action opens in view mode by double-clicking on an entry in the list.

Actions						
	Locked by	Action cons. No	Action title	Action status	ActionDate1	Person in Charge 1
1		01	Maßnahme 1	Abgeschlossen eng.	4/13/2021	Sonnenschein AG info@iit-gmb...

Navigator note / note (client)

Notes can be entered via the Navigator entries Note and Note (client).

The revision and the client can view the note documents under the entry Note. The note documents under Note (client) can only be viewed by the client; they are used only for the client to enter notes.



Navigator attachment / attachment (client)

File attachments can be attached to the finding via the Navigator entries Attachment and Attachment (client).

The revision and the client can see the attachments under the Attachment entry together. The attachment (client) can only be used and viewed by the client.

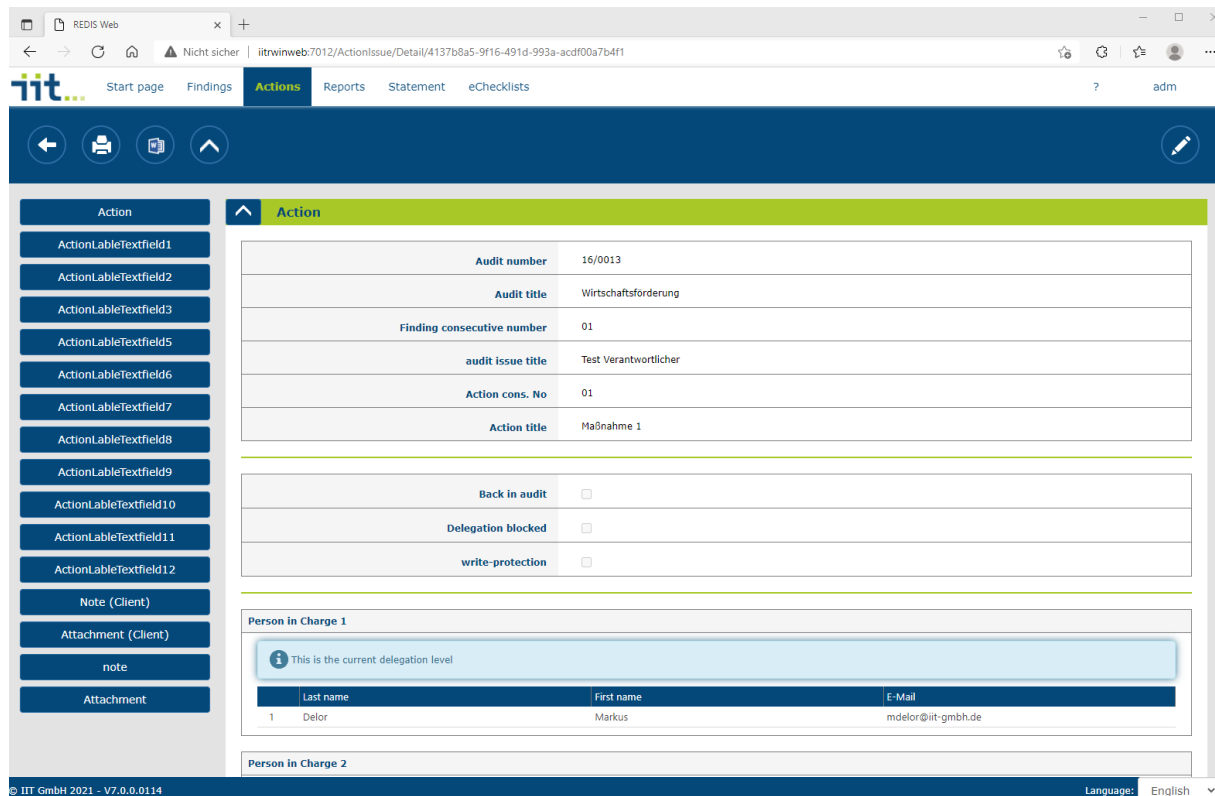


3.2. Detail actions in Web portal

The general usage corresponds to that of the finding. Like the finding, the action form is structured by a navigator. The structure and the operating elements were described in the findings and also apply to the actions.

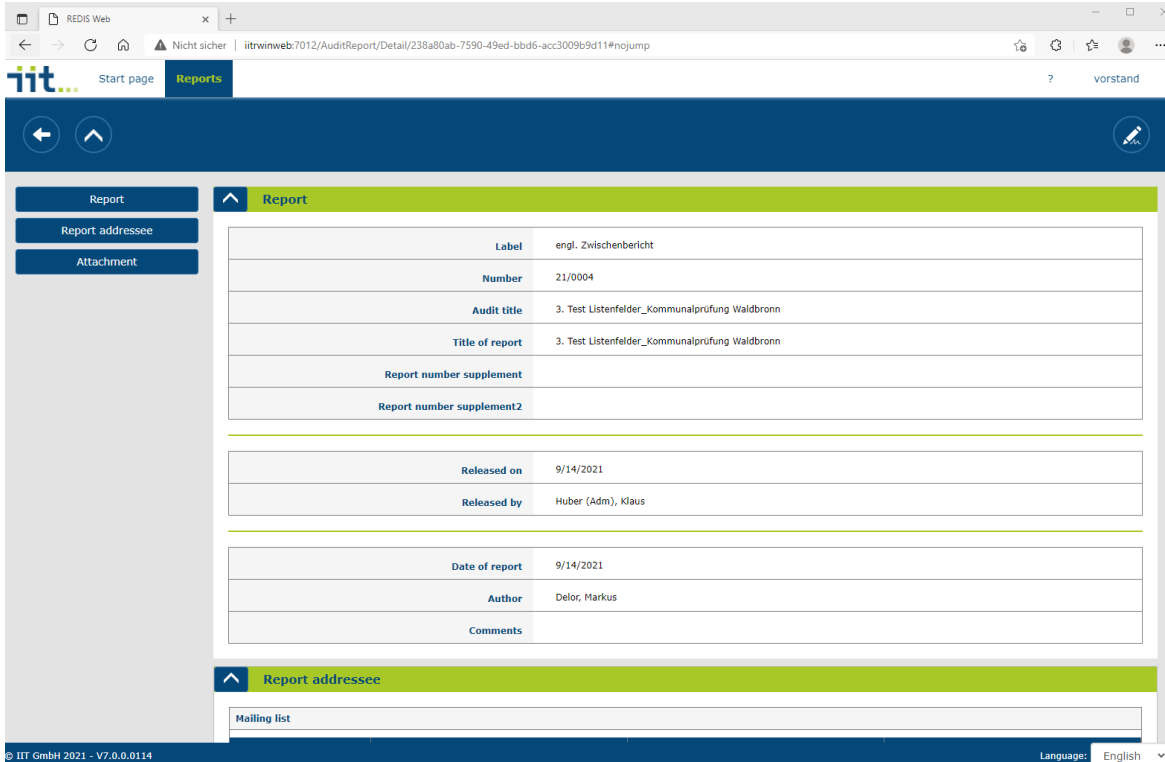
If the configuration element Activate Actions has been set, the tracking is shifted from the finding object to the action object! This includes deadline monitoring.

The buttons for the FollowUp functions are thus displayed on the action.

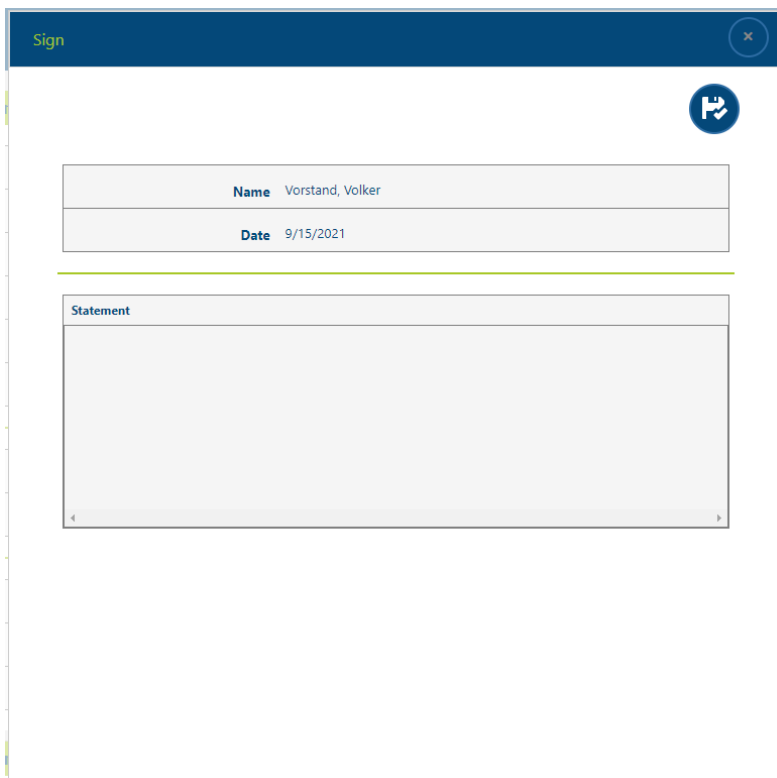


3.3. Detail reports in Web portal


The general usage corresponds to that of the finding. Like the finding, the report form is structured using a navigator. There are fewer controls than there are for findings and actions. The buttons Back to overview and Close areas are located on the left in the header. The Sign Report button is on the right. The button looks similar to the Edit button, but has a small addition in the lower right corner.



A click on the button opens the dialog for signing. If the Comment on the report function is activated in the configuration, an RTF field is displayed for comment. Otherwise, only the Sign and Close button can be displayed.

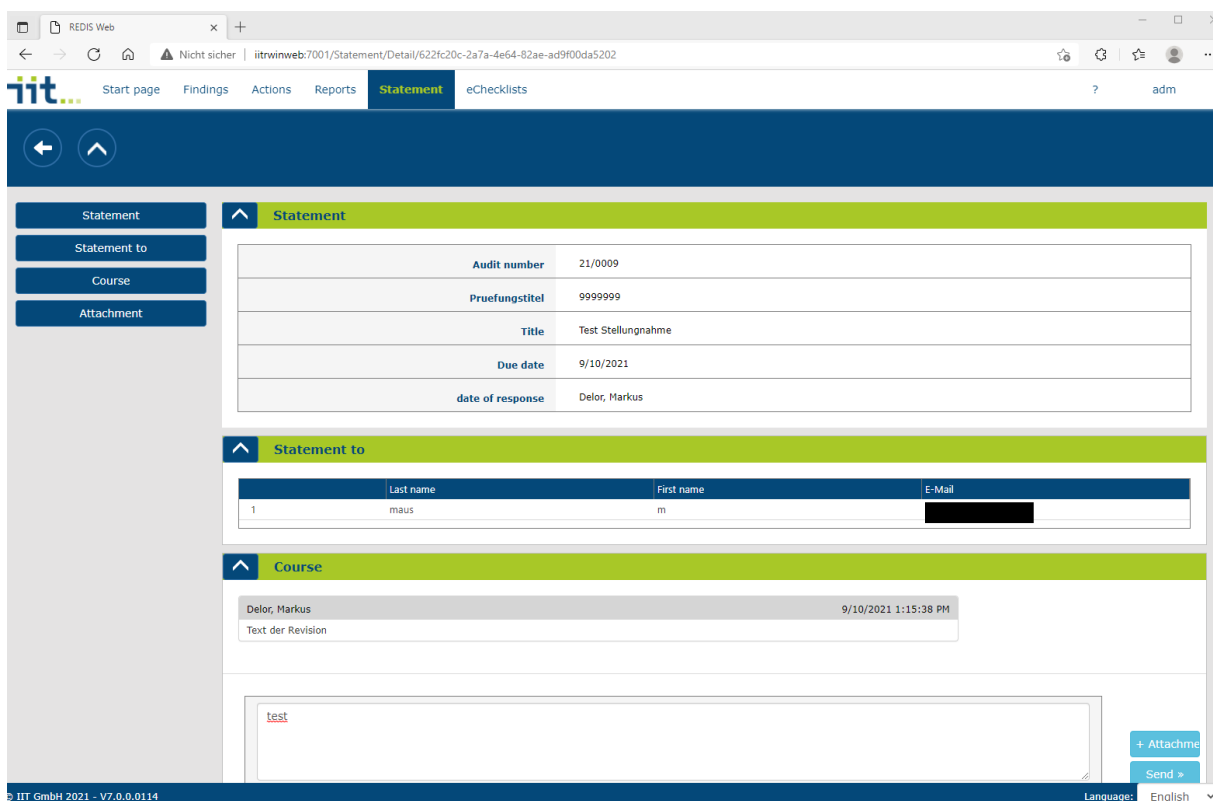


If the Sign and Close button is clicked, a Report signed by table appears in the Report recipient area. There it is documented who signed the report and when. The icon in the Comment column shows that a comment has been made. A double-click on the icon opens the Sign report dialog in read mode.

Report addressee			
Mailing list			
	Last name	First name	E-Mail
Management Board			
	Last name	First name	E-Mail
1	Vorstand	Volker	volker.vorstand@iit-gmbh.de
Report signed by			
	Name	Date	Statement
1	Vorstand, Volker	9/15/2021	

3.4. Detail statement in Web portal

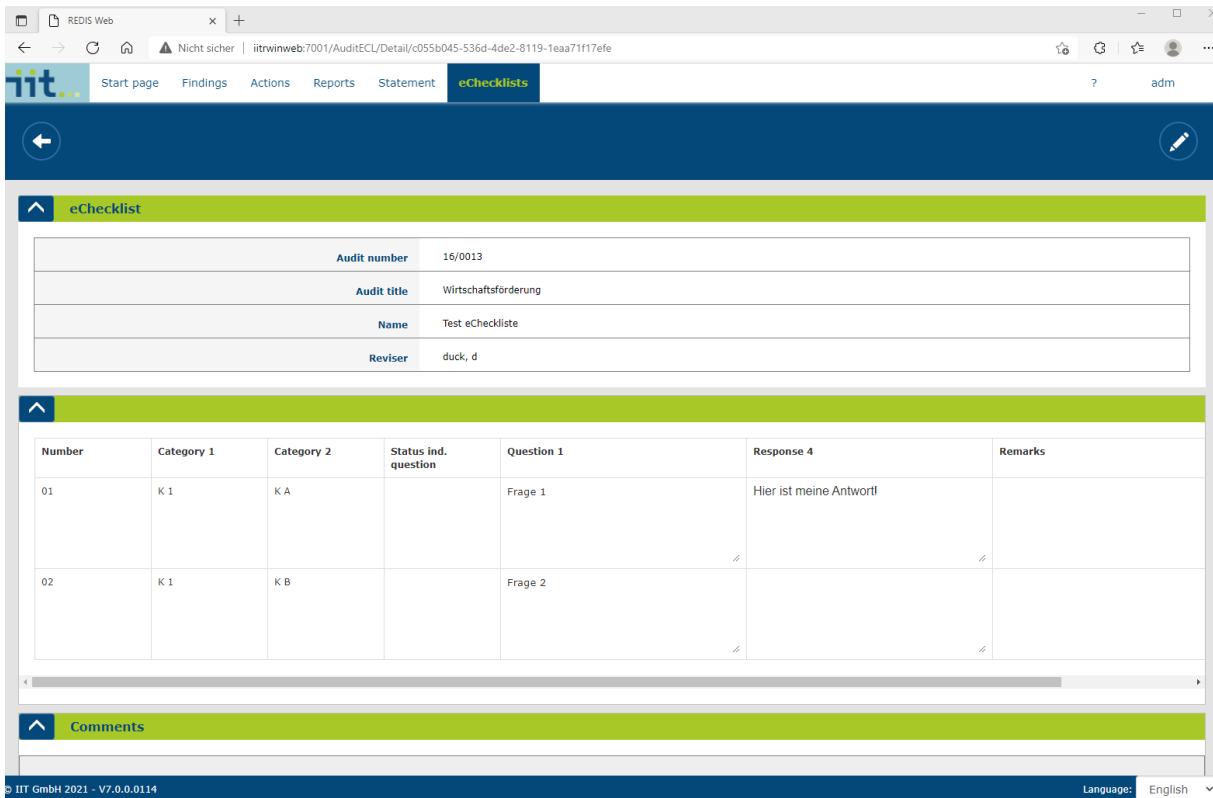
In the header of the detail page there are only two buttons on the left. In the upper area, the information to which audit the statement belongs, title, date and sender are displayed. Below it is shown to whom the statement was addressed. All addressees can access the statement.



The text of the statement can be entered in the History area. Only text can be entered in the text field, no images, graphics or tables! As soon as a text has been entered, the Send button is displayed. The Attachment button opens a dialog for connecting attachments. No files can be linked.

3.5. Detail eChecklists in Web portal

The detail page of the eChecklists in the web portal has only two buttons in reading mode, the button for back to overview on the left and the button for switching to edit mode on the right.



The screenshot shows the 'eChecklist' page in the IIT web client. At the top, there is a navigation bar with 'Start page', 'Findings', 'Actions', 'Reports', 'Statement', and 'eChecklists'. Below this, the audit data is displayed in a table:

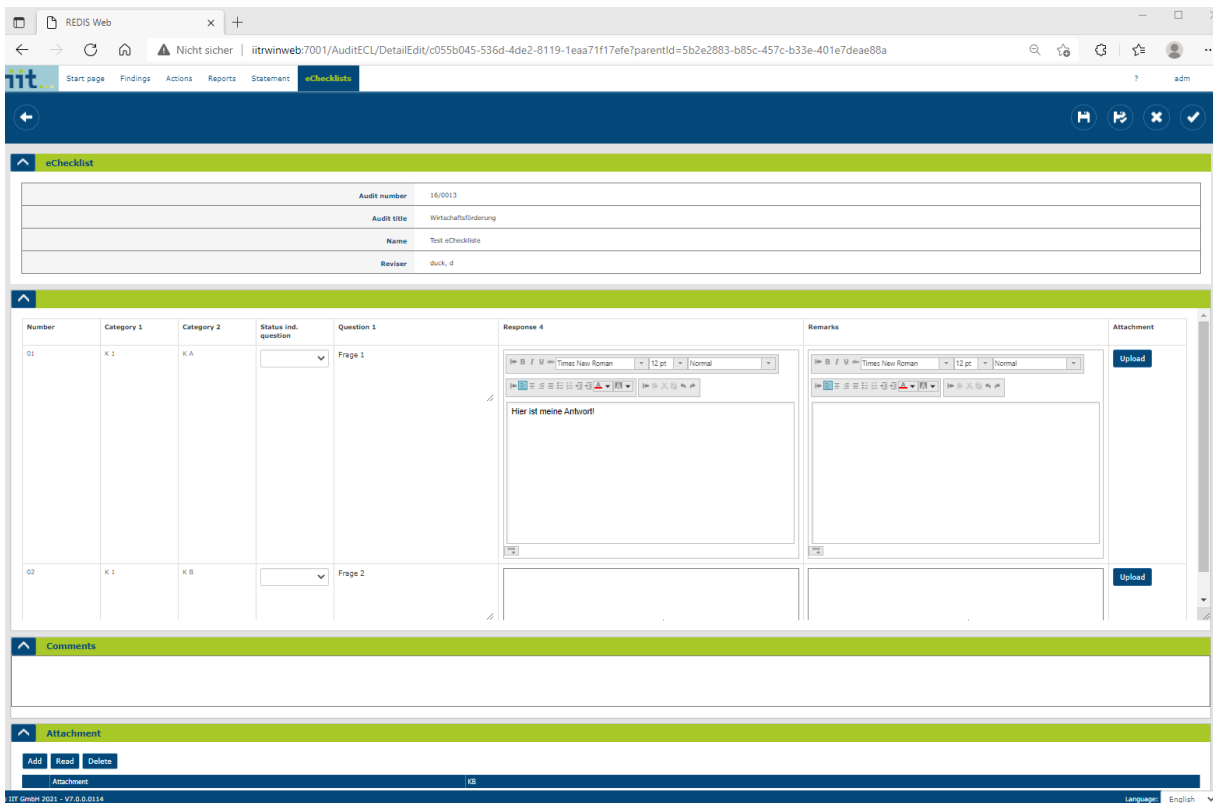
Audit number	16/0013
Audit title	Wirtschaftsförderung
Name	Test eCheckliste
Reviser	duck, d

Below the audit data is a table with the following columns: Number, Category 1, Category 2, Status ind. question, Question 1, Response 4, and Remarks.

Number	Category 1	Category 2	Status ind. question	Question 1	Response 4	Remarks
01	K 1	K A		Frage 1	Hier ist meine Antwort	
02	K 1	K B		Frage 2		

At the bottom of the page, there is a 'Comments' section and a footer with 'IIT GmbH 2021 - V7.0.0.0114' and 'Language: English'.

In the upper area of the eChecklist, the audit data and the editor(s) are named. Including the questions of the eChecklist in table format. When you click on one of the RTF fields, the editing window for the RTF field is opened.



This screenshot shows the same 'eChecklist' page, but with the editing window for the RTF field open. The table from the previous screenshot is visible, but the 'Response 4' and 'Remarks' columns for row 01 are now expanded into a larger editing area. This area includes a rich text editor (RTF) with a toolbar and a text input field containing 'Hier ist meine Antwort'. There are also 'Upload' buttons for attachments. The footer remains the same: 'IIT GmbH 2021 - V7.0.0.0114' and 'Language: English'.

At the end on the right there is the Upload button; clicking it allows attachments to be assigned directly to this question.

