
DOCUMENT PACKAGE: GENERIC DOCUMENT TYPES

Reference Guide

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WELCOME

Welcome to the Reference Guide of the Generic Document Types document package. This guide describes all aspects of the generic document types Appointment, Contact, Note, and Task. It is intended for users and functional administrators of PLA 3.0.

The structure of this guide is as follows:

Description of the different document types

- Description of the document
- Literature References (optional)
- Document concepts (optional)
- Available Reports
- Available Tasks

Reference Information

- Document Outlines – describe the overall structure of the documents
- Document Structure – overall list of all document elements
- Element Reference – description of every field
- Aggregation Opportunities – which data could be aggregated from other documents
- Digests – data that can be used by other documents

INTRODUCTION

The Generic Document Types document package covers a set of four standard document types:



Contact

A contact document allows documenting standard contact data.



Note

A note document is just a small document that allows you to leave notes in the folders of the database.



Appointment

An appointment document is a calendar entry.



Task

A task document represents a simple task.

CONTACT

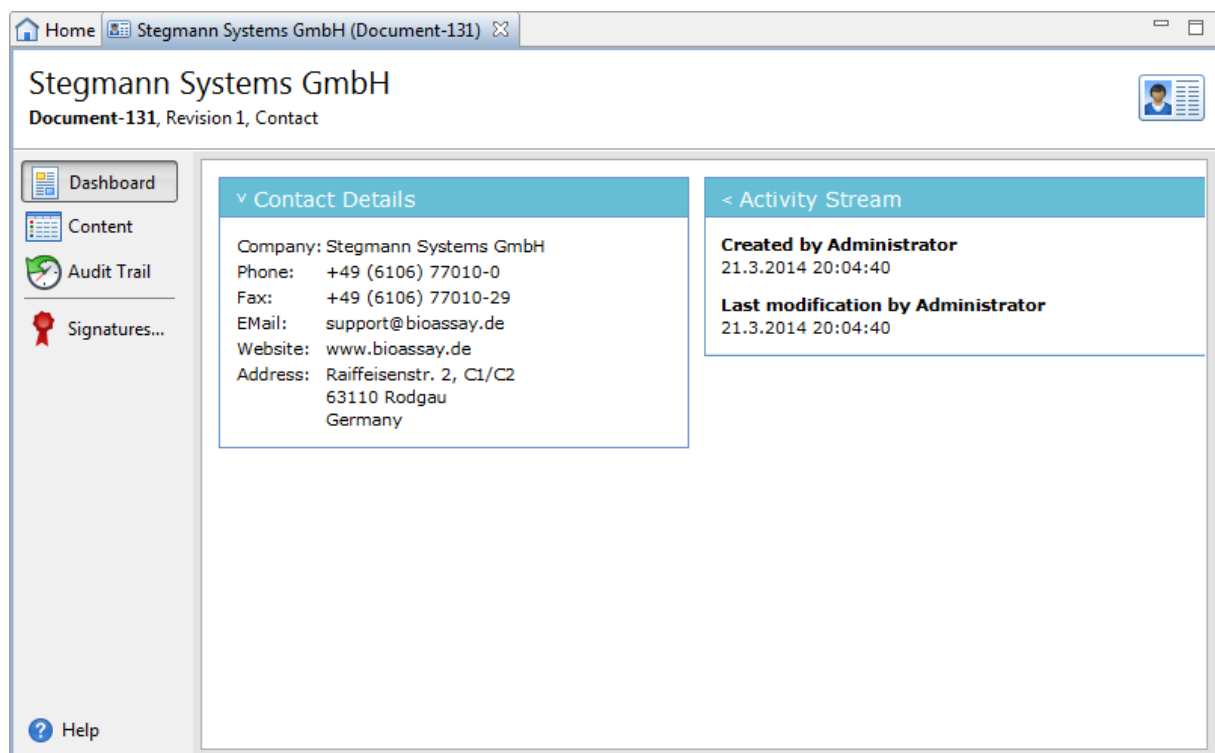


DESCRIPTION

A contact document allows leaving contact details in a folder. A contact can be an organization or an individual. The contact basically consists of

- Identification (Names, Title, Company)
- Communication (Phone, Fax, E-Mail)
- Addresses (one or more addresses)

The contact document is represented on the dashboard.



The screenshot shows a web application interface for a document titled "Stegmann Systems GmbH (Document-131)". The main content area is divided into two sections: "Contact Details" and "Activity Stream".

Contact Details:

- Company: Stegmann Systems GmbH
- Phone: +49 (6106) 77010-0
- Fax: +49 (6106) 77010-29
- E-Mail: support@bioassay.de
- Website: www.bioassay.de
- Address: Raiffeisenstr. 2, C1/C2
63110 Rodgau
Germany

Activity Stream:

- Created by Administrator**
21.3.2014 20:04:40
- Last modification by Administrator**
21.3.2014 20:04:40

The interface includes a left sidebar with navigation options: Dashboard, Content, Audit Trail, Signatures..., and Help. The top navigation bar shows "Home" and "Stegmann Systems GmbH (Document-131)".

CONCEPTS

Any number of addresses or communication data can be held in the document just by adding additional address or communication fields to the dataset.

REPORTS

- None

TASKS

- None

NOTE



DESCRIPTION

A note document allows leaving a note in a folder. A note basically consists of:

- Author
- Timestamp
- Title
- Text

The note is represented on the dashboard.

A screenshot of a web application dashboard. The browser window title is 'Support (Document-132)'. The page title is 'Support' with a subtitle 'Document-132, Revision 1, Note'. A yellow sticky note icon is in the top right. On the left is a navigation menu with 'Dashboard', 'Content', 'Audit Trail', 'Signatures...', and 'Help'. The main content area has a teal header 'Support' and contains a note with the following text: 'Thank you for using PLA 3.0, a product of Stegmann Systems, Rodgau, Germany. Please do not hesitate to contact us in case of any questions or recommendations. You can reach us by phone: +49 6106 77010-0 or by e-mail: support@bioassay.de The product website is found at www.bioassay.de by Matthias Schmitt on 19.3.2014 11:42:11'. To the right is an 'Activity Stream' section with two entries: 'Created by Administrator 21.3.2014 20:04:40' and 'Last modification by Administrator 21.3.2014 20:04:40'.

CONCEPTS

SIMPLIFIED WIKI-NOTATION

The text-section of a note allows to make use of simple Wiki-notation for a few formatting capabilities. The syntax is derived from from a typical wiki system, but only a few markups are supported:

Markup	Formatting	Sample
=H1=	Heading Level 1	=Main Heading=
==H2==	Heading Level 2	==A second level heading==
...		
====H5====	Heading Level 5	====A fifth Level Heading====
* Bullet List	Bullet List Level 1	* Sample
** Bullet List	Bullet List Level 2	** Level 2 Sample
# Numbered List	Numbered List Level 1	# Sample
## Numbered List	Numbered List Level 2	## Sample Level 2
bold	Bold Markup	*Sample*
italic	Italic Markup	_Sample_

Paragraphs are separated by an empty line.

REPORTS

- None

TASKS

- None

APPOINTMENT



DESCRIPTION

An appointment document allows leaving appointment data in a folder. Appointments information basically consists of

- Date (Day and Time)
- Topic
- Details
- Author

The appointment is represented on the dashboard.

The screenshot shows a web browser window displaying a document dashboard. The browser tab is titled "2014-04-15T10:00:00Z PLA 3.0 is generally available (Document-133)". The document title is "2014-04-15T10:00:00Z PLA 3.0 is generally available" and the subtitle is "Document-133, Revision 2, Appointment".

The dashboard includes a left-hand navigation menu with the following items:

- Dashboard
- Content
- Audit Trail
- Signatures...

The main content area is divided into two sections:

- PLA 3.0 is generally available**: This section contains the text "The planned release data of PLA 3.0 is April 15th." and "by Administrator on 2014-04-15T10:00:00Z".
- Activity Stream**: This section shows the following activity:
 - Created by Administrator** on 21.3.2014 20:04:41
 - Last modification by Administrator** on 10.4.2014 14:57:55
 - Administrator edited this document.** Less than a minute ago.

A "Help" link is visible in the bottom left corner of the dashboard.

REPORTS

- None

TASKS

- None

TASK

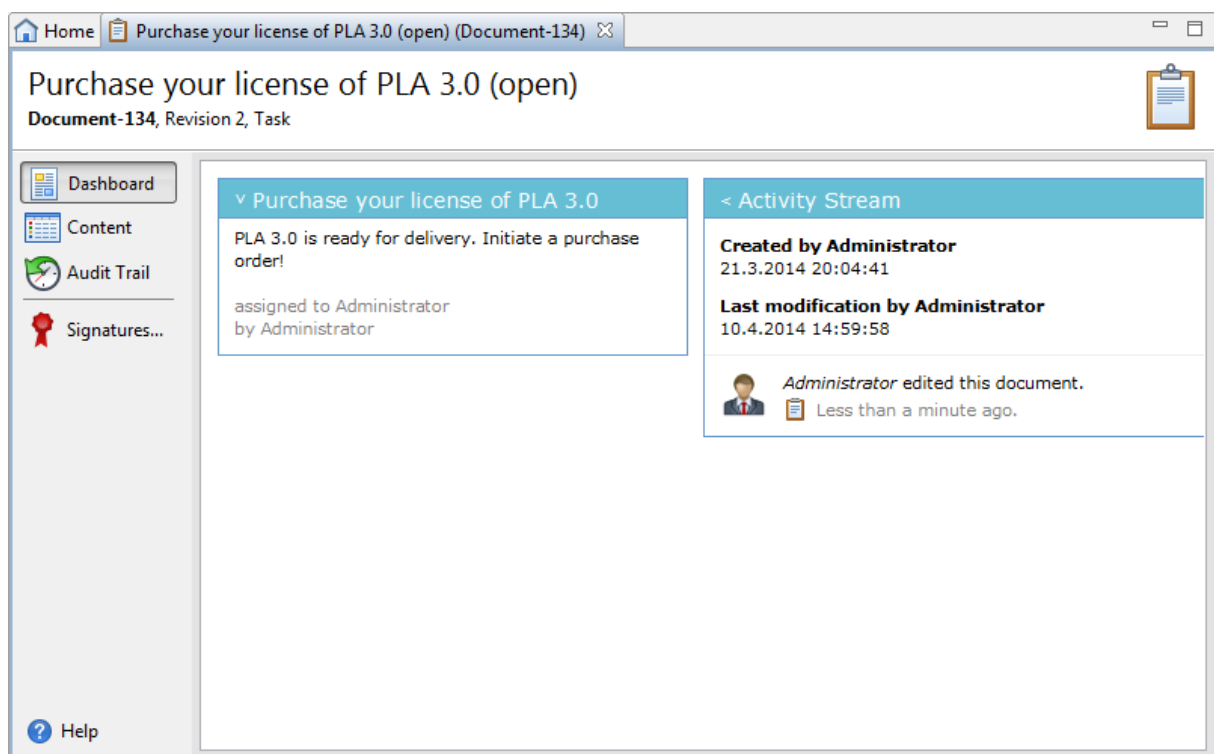


DESCRIPTION

A task document allows leaving task descriptions in a folder. A task basically consists of:

- Topic
- State (Completed or open)
- Assignee
- Details

The task is represented on the dashboard.



The screenshot shows a web application interface. At the top, there's a browser window with the title 'Purchase your license of PLA 3.0 (open) (Document-134)'. Below the browser window, the application header displays 'Purchase your license of PLA 3.0 (open)' and 'Document-134, Revision 2, Task'. On the left side, there is a navigation menu with icons and labels: 'Dashboard', 'Content', 'Audit Trail', 'Signatures...', and 'Help'. The main content area is divided into two sections. The left section, titled 'Purchase your license of PLA 3.0', contains the text: 'PLA 3.0 is ready for delivery. Initiate a purchase order!' and 'assigned to Administrator by Administrator'. The right section, titled '< Activity Stream', shows a log of actions: 'Created by Administrator' on 21.3.2014 20:04:41, 'Last modification by Administrator' on 10.4.2014 14:59:58, and a recent edit by 'Administrator' less than a minute ago.

REPORTS

- None

TASKS

- None

REFERENCE INFORMATION

DOCUMENT OUTLINE

The overall structure of the Note, Appointment and Task document is not hierarchical. In the Contact document the addresses are shown as a hierarchy.

Contact

- Contact Root of the Contact document
- Address A single address

Note

- Note Root of the Note document

Appointment

- Appointment Root of the Appointment document

Task

- Task Root of the Task document

DOCUMENT STRUCTURE

The following table lists the complete structure of all available fields for the different generic documents. It is indicated whether a field is required or optional. The number is a reference to the following section with more reference data for every field.

Contact	required	1
. Salutation	optional	2
. First Name	optional	3
. Middle Name	optional	4
. Last Name	optional	5
. Title	optional	6
. Company	optional	7
. Department	optional	8
. Phone	optional	9
. Fax	optional	10
. e-Mail	optional	11
. Website	optional	12
. Address	optional	13
. . Type of the Address	optional	14
. . Address Line	required	15
. Remark	optional	16
Note	required	17
. Author	required	18
. Date	optional	19
. Topic	required	20
. Text	required	21

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Appointment	required	22
. Date	required	23
. Topic	required	24
. Details	optional	25
. Author	optional	26
Task	required	27
. Topic	required	28
. Task Completed?	required	29
. Assignee	optional	30
. Due Date	optional	31
. Details	optional	32
. Author	optional	33

DOCUMENT ELEMENT REFERENCE

/				1
Contact				USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Contact		xs:empty		1...1
				DEFAULT VALUE <NONE>
Document a contact related to this database, project or folder. A contact can have multiple addresses and remarks. Some of the fields are optional. Simply delete them, if they are not required. Other elements (e.g. phone number) can occur multiple times. Add them as often as they are required.				

/Contact/				2
Salutation				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Salutation		xs:token		0...1
				DEFAULT VALUE <NONE>
Salutation of the contact person. Remove this field, if it is not required.				

/Contact/				3
First Name				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
FirstName		xs:token		0...1
				DEFAULT VALUE <NONE>
First Name of the contact person. Remove this field, if it is not required.				

/Contact/				4
Middle Name				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
MiddleName		xs:token		0...1
				DEFAULT VALUE <NONE>
Middle Name of the contact person. Remove this field, if it is not required.				

Reference Information

/Contact/ Last Name				5
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
LastName		xs:token		0..1
				DEFAULT VALUE <NONE>
Last Name of the contact person. Remove this field, if it is not required.				

/Contact/ Title				6
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Title		xs:token		0..1
				DEFAULT VALUE <NONE>
Title of the contact person. Remove this field, if it is not required.				

/Contact/ Company				7
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Company		xs:token		0..1
				DEFAULT VALUE <NONE>
Company name of the contact. Remove this field, if it is not required.				

/Contact/ Department				8
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Department		xs:token		0..1
				DEFAULT VALUE <NONE>
Department name of the contact. Remove this field, if it is not required. You can add multiple department lines if they are required.				

/Contact/ Phone				9
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Phone		xs:token		0..*
				DEFAULT VALUE <NONE>
Phone number for the contact. Remove this field, if it is not required. You can add multiple phone numbers if required.				

/Contact/ Fax				10
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Fax		xs:token		0..1
				DEFAULT VALUE <NONE>
Fax number of the contact. Remove this field, if it is not required.				

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/Contact/ <i>e-Mail</i>				11
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
E-Mail		xs:token		0...1
				DEFAULT VALUE <NONE>
e-Mail Address of the contact. Remove this field, if it is not required. You can add multiple e-mail addresses lines if required.				

/Contact/ <i>Website</i>				12
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Website		xs:token		0...*
				DEFAULT VALUE <NONE>
Website URL of the contact. Remove this field, if it is not required. You can add multiple websites if they are required.				

/Contact/ <i>Address</i>				13
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Address		xs:empty		0...*
				DEFAULT VALUE <NONE>
An address of the contact. Remove this field, if it is not required. You can add multiple addresses if required. Addresses simply consist of address lines, to meet international requirements.				

/Contact/Address/ <i>Type of the Address</i>				14
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Type		xs:token		0...1
				DEFAULT VALUE <NONE>
Describe the type of address to distinguish multiple addresses.				

/Contact/Address/ <i>Address Line</i>				15
				USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Adressline		xs:token		1...*
				DEFAULT VALUE <NONE>
An address consists of as many address line, which are required to display the address in a 'natural' manner, to meet international requirements.				

/Contact/ <i>Remark</i>				16
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Remarks		xs:string		0...*
				DEFAULT VALUE <NONE>
Any remarks for this contact. You may add any number of remarks.				

/ <i>Note</i>				17	
				USAGE required	
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	<i>Note</i>	xs:empty		1...1	<NONE>
A Note related to this database, project or folder.					

/Note/ <i>Author</i>				18	
				USAGE required	
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	<i>Author</i>	xs:token		1...1	<NONE>
The author of the Note.					

/Note/ <i>Date</i>				19	
				USAGE optional	
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	<i>Date</i>	xs:dateTime		0...1	<NONE>
The date when the Note has been written.					

/Note/ <i>Topic</i>				20	
				USAGE required	
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	<i>Topic</i>	xs:token		1...1	<NONE>
The topic of the Note.					

/Note/ <i>Text</i>				21	
				USAGE required	
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	<i>Text</i>	xs:string		1...*	<NONE>
The content of the Note.					

/ <i>Appointment</i>				22	
				USAGE required	
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	<i>Appointment</i>	xs:empty		1...1	<NONE>
An appointment related to this database, project or folder.					

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/Appointment/ Date				23
				USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Date		xs:dateTime		1...1
				DEFAULT VALUE <NONE>
The date/time of the appointment.				

/Appointment/ Topic				24
				USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Topic		xs:token		1...1
				DEFAULT VALUE <NONE>
The topic of the appointment.				

/Appointment/ Details				25
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Details		xs:string		0...*
				DEFAULT VALUE <NONE>
Details of the appointment.				

/Appointment/ Author				26
				USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Author		xs:token		0...1
				DEFAULT VALUE <NONE>
The author of this appointment entry.				

/ Task				27
				USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Task		xs:empty		1...1
				DEFAULT VALUE <NONE>
A task related to this database, project or folder.				

/Task/ Topic				28
				USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY
Topic		xs:token		1...1
				DEFAULT VALUE <NONE>
The topic of the task.				

/Task/					29
<i>Task Completed?</i>					USAGE required
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	Completed	xs:boolean		1...1	<NONE>
Is the task completed?					

/Task/					30
<i>Assignee</i>					USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	Assignee	xs:token		0...1	<NONE>
The assignee of this task.					

/Task/					31
<i>Due Date</i>					USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	DueDate	xs:date		0...1	<NONE>
The due date of the task.					

/Task/					32
<i>Details</i>					USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	Details	xs:string		0...*	<NONE>
Details of the task.					

/Task/					33
<i>Author</i>					USAGE optional
TECHNICAL	NAME	DATA	TYPE	MULTIPLICITY	DEFAULT VALUE
	Author	xs:token		0...1	<NONE>
The author of this task.					

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AGGREGATION OPPORTUNITIES

N/A

DIGEST RESULTS

The following information can be found in the digest and is accessible through other documents.

Label	Description	Data Type	Key [SSY] = http://www.stegmannsystems.com
Document Title	Title of the Document.	String	http://purl.org/dc/terms/title