Document Management Server

I gŸf˙A Ubi Ủ

Index

1   PREFACE

With the DMS of OpenIMS you can collaborate on documents in a structured manner. It is a document management system with a focus on user-friendliness.

OpenIMS functions entirely from a web browser. This allows a user to access all documents from any location, provided they have an internet connection, whereas working offline is also possible.

1.1   Client Specifications

An OpenIMS user must have at least:

- Internet Explorer, Edge, Safari, Chrome or Firefox;
- The applications you want to edit documents with must be available; such as, for example, Microsoft Office;
- The OpenIMS Transfer Agent (see https://openims.com/downloads for the latest version).

2 INTRODUCTION TO OPENIMS

As indicated, OpenIMS is 100% web-based. This means that you perform all actions via your web browser. Depending on your rights, you may or may not be able to access certain parts. Therefore, you must be logged in to OpenIMS.

2.1 Log in

You start your web browser and enter the URL of the domain under which your data is stored. To go to the document management portal, add the word "DMS" to the url (eg http://intranet.yourcompany.nl/dms). From here the OpenIMS login screen appears. You can now enter your username and password, which will take you to the DMS of OpenIMS.

2.2 Language selection

The DMS is multilingual. You will find the language selection in your profile menu at the top right of the screen.

3   OPENIMS FUNCTIONS

Name	Function	Short description	Refers to
View	👁	This option opens the latest version of the document as **read-only**.	Document
Edit	DOC	This option opens the latest version of the document so it can be edited.	Document
E-mail	✉	Send an e-mail message containing a hyperlink to the document.	Document
Upload new version	⬆	This function allows you to upload a newer version of an existing file.	Document
Properties	✎	Allows you to view and adjust the document properties. In addition to the description and title, the workflow and metadata are also recorded here.	Document / Folder
History	≋	The historical overview shows all versions in chronological order. Here you can see who changed what and when.	Document
Signal	🔔	If you want to receive a signal when the document has been changed, you can enable this function (subscription).	Document
Move [1]	🚚	If it turns out that a document or a folder is not in the right place within the DMS, you can move it to another place with this function	Document
Preview version	🔍	This is a link (url) to the preview version of the document.	Document
Published version	✓	This function provides a secure hyperlink (url) to the published document.	Document
Revoke	✖	Makes the last published version of the document current again if changes have been made to the document since that publication.	Document
Copy	📄	Allows you to copy the current document.	Document
Template	📄	With this function a document can be promoted to a template. The document then appears in the list of template documents.	Document
Delete file	🗑	Allows you to delete the document or folder.	Document / Folder
New folder	📁	Within the current folder you can create a new folder by selecting this function.	Folder
Move folder	🚚	If it turns out that a document or a folder is not in the right place within the DMS, you can move it with this.	Folder
Down	⬇	Move folder down.	Folder
Up	⬆	Move folder up.	Folder
Upload	⬆	With this function you can place (upload) new files in the DMS. The files are placed in the active folder.	Folder
Add as favorite	☆	With this function you can add a folder or document as a favorite.	Document / Folder

---

[1] This function manifests itself in the Action menu or in the Document selection menu.

4 DOCUMENT MANAGEMENT

OpenIMS has extensive facilities to manage more than just documents. You can think of images that you want to make available in a central location, or documents that you want to offer for download. This includes for example Microsoft Office, Cad drawings, Adobe Acrobat (PDF) or Gif, Tiff, JPG and other formats.

4.1 Functional overview

4.1.1 Generic (Document overview)

This overview consists of 8 sections. These are:

1. Navigation section,
2. Case or folder section,
3. Documents section,
4. Document action section,
5. Document workflow section,
6. Wizards section,
7. Document selection section,
8. New document section.
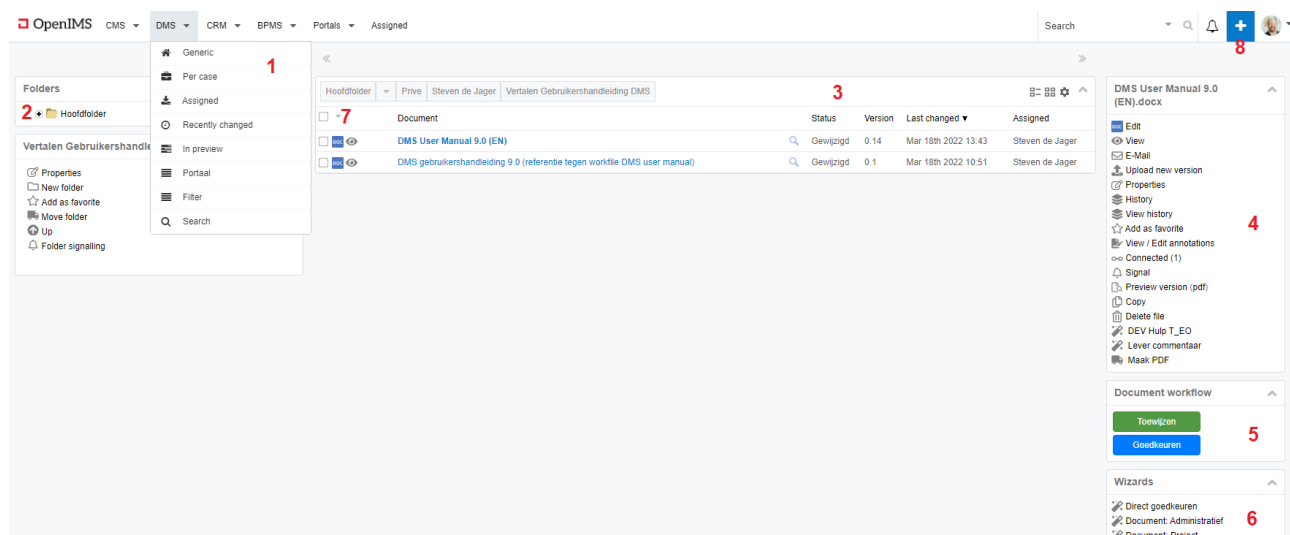
Using the **navigation section** (1), a number of views on the DMS can be selected.

As point of view (image on the right) you can choose:

Per case; from this point of view you can zoom in on the case environment.
Assigned; from this point of view documents assigned to you are shown.
Recently changed; from this point of view the most recently modified documents are shown in chronological order.
In preview; from this point of view documents are shown from the available workflows.
Search; search for documents in the DMS.

The different points of view are explained in more detail in the following paragraphs.
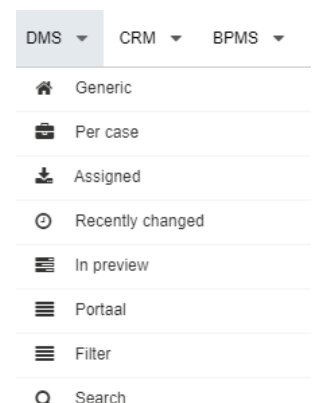
The **case or folder section** (2) allows you to navigate through the entire folder structure within a particular case and works similar to Windows Explorer. A user can click a plus to open a folder and a minus to close it.

Below the **case or folder section** you can use the **folder actions** to maintain the complete folder structure of the opened case (provided you have the necessary rights). It includes functionality to delete, create and move folders.

By clicking on a folder, the documents contained in that folder will be displayed in the **documents section** (3). All available documents for that user are displayed here. It is possible that a certain folder appears empty to one employee, while another employee does see documents in it. This has to do with the authorization model (rights model).

If a specific document is selected in the **documents section**, the actions that can be performed on the relevant document are displayed in the **document action section** (4).

The **document workflow section** (5) shows which follow-up actions, defined within the workflow, can be performed for the selected document. Think of actions such as approve, reject, publish, etc.

The **document selection section** (7) gives you the option to select a number of documents and then move them, download them or create a report or snapshot.

The **new document section** lists the available (documents) templates with which you can create new documents. There is also the option to upload an existing document that is present at your local workplace, for example.

The **wizards section** (6) contains functionality specific to your organization. With the help of a wizard, a number of standard operations can be performed automatically.

4.1.2   Per case

If your organization works with cases, you can use the "Per case" functionality. After selecting the "Per case" function, a user will arrive at an overview with the first 25 files (for example project files). You can browse through it.
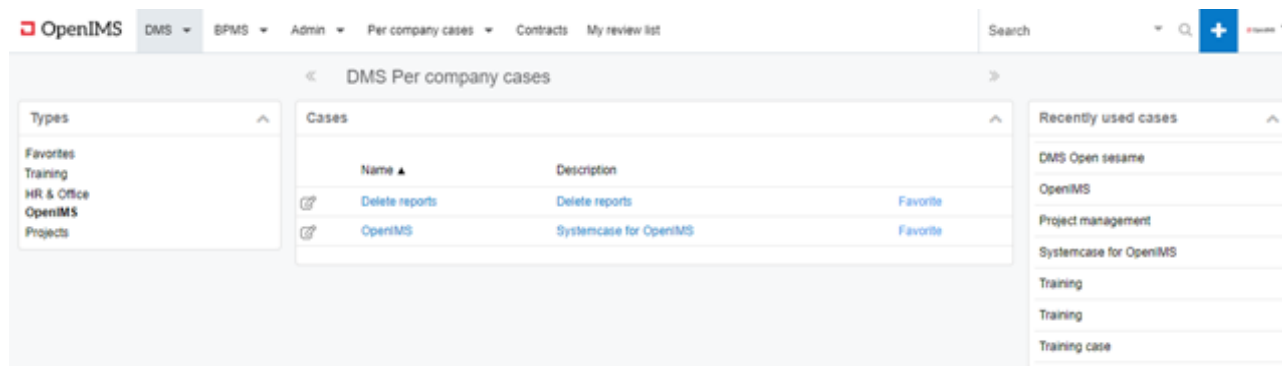
Depending on the setup, it is also possible to work with case categories as shown on the left. After selecting a category, the associated cases are displayed.

Depending on your rights, you can add new cases, delete them or adjust their properties.

If more than 25 cases are available, you can search for a case using a search function. Then there is also an overview with the most recently opened cases and the most recently used filters.
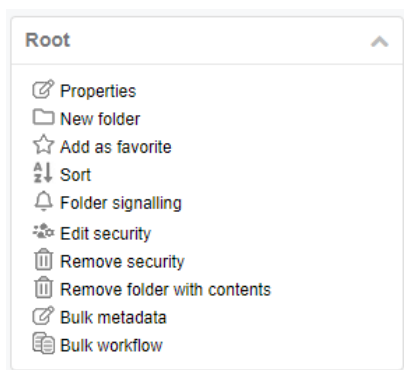
It is also possible to mark certain cases as favorites. To mark a case as a favorite, you can click on "Favorite" next to the description of the case (see image on the right). The selected case will be added to the "Favorites" category, and these will always be shown first if "Per case" is selected.

In addition, it is possible to make a case favorite when the case is open. In the properties at the bottom left of the screen, a case can be marked as a favorite.

If a case needs to be removed from the favorites list, this can be done in the overview of the case category "Favorites"
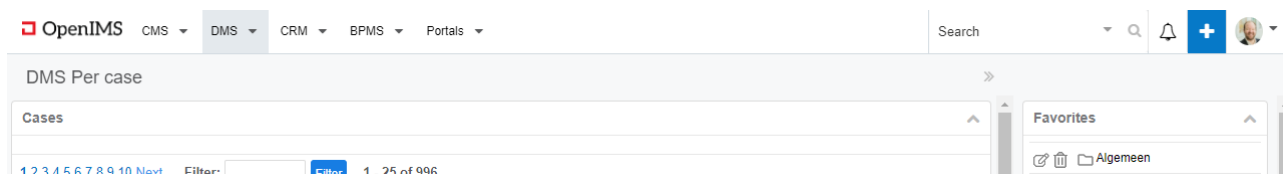
Click on the trashcan in the 'Favorites' menu next to the case, so it will be removed from the favorites list.

4.1.3   Assigned (Document overview)

The mapped overview consists of four sections. These are:

1. Navigation section,
2. Assigned Section,
3. Document action section,
4. Document workflow section.
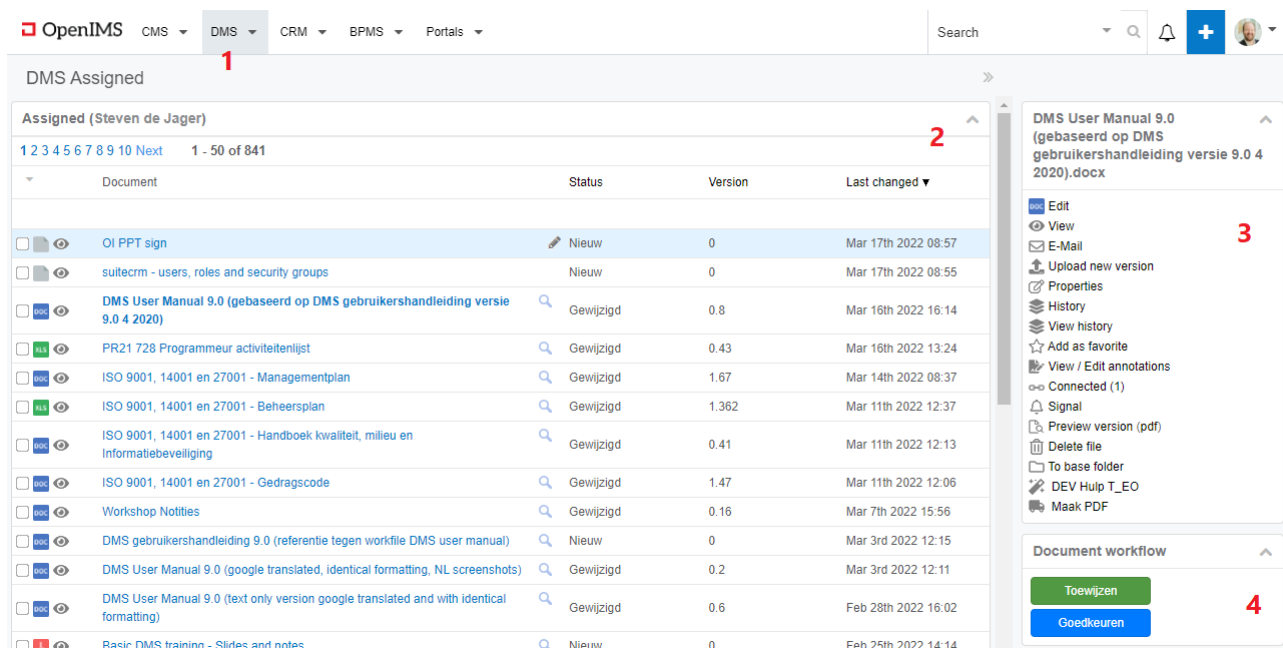
The **assigned section (2)** provides an overview of all documents, including status, that have been assigned to the relevant user.

If a specific document is selected in the **assigned section (2)**, the actions that can be performed on the specific document are displayed in the **document action section (3)**.

The **document workflow section (4)** shows which follow-up actions, defined within the workflow, can be performed for the selected document. Think of actions such as approve, reject, publish, etc.

4.1.4   Recently changed (Document overview)

The recently changed overview consists of two sections. These are:

1. Navigation section.
2. Recently changed section.

The **recently changed section (2)** provides a chronological overview of all recently changed documents. By default it shows the documents you have recently changed, but clicking on "by me" will show a list of documents that have been modified by everyone.
Recently changed (by everyone) by clicking on the text "by everyone" you can also see which 25 documents you have recently modified.

4.1.5   In preview (Document overview)

The **in preview** overview consists of 6 sections. These are:

1. Navigation section,
2. Workflow section,
3. Documents section,
4. Document action section,
5. Document workflow section,
6. Wizards section.

The **workflow section (2)** lists all user-assigned workflows and the stages that can occur per workflow. The number of documents contained in each stage is displayed.

By selecting a stage within a workflow, all associated documents are displayed in the **documents section (3)**.

If a specific document is selected in the **documents section (3)**, the actions that can be performed on the relevant document are displayed in the **document action section (4)**.

In the **document workflow section (5)** for the selected document it is shown which follow-up actions, defined within the workflow, can be performed. Actions such as approve, reject, publish, etc. If activated, an icon is also visible here with an explanation of this workflow.

4.1.6   Search

Search allows you to search for specific documents. Searching is based on full-text and/or metadata.
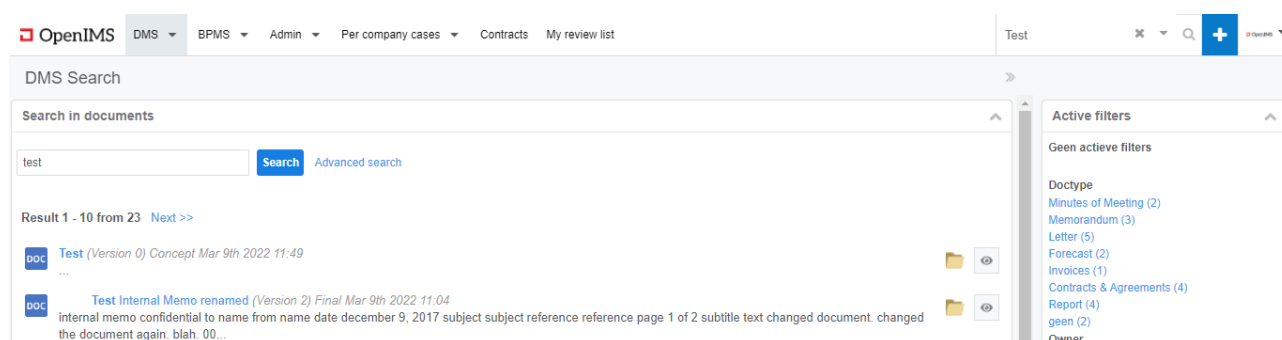
The search engine searches through the content and meta information of the document. The moment a search term is found in the metadata, this will be weighted more, so that a document is placed higher in the results list.

View the document
Select the document name and the document will be opened in "Read Only" mode.

Document location / edit document
If you want to edit the document or navigate to the folder where the document is actually located, you need to choose the folder icon (📁) behind the name of the document.

View
If there is a magnifying glass icon next to the name, you can quickly view the document (first page). The viewer supports standard PDF and many image formats; If you want to be able to view Office documents quickly, the PDF conversion option must be configured.

Filter
The active and possible filters are shown on the right side of the screen. The active filters are the filters that are active; the possible filters are the filters that can be filtered on. If a filter value is clicked, the search results are filtered on that value. The selected filter value becomes an active filter.

4.1.7 Advanced Search

In addition to standard search, there is also an "Advanced Search" function. Within this screen you can search for the following information:

- Specific metadata fields,
- Document status (modified / published),
- specific workflow,
- File format,
- Date.

4.1.8 Multiple search indexes

If certain documents should not be found by everyone, it is possible to place these documents in other search indexes. A select group receives access to this index and can find the documents. Please contact your IT administrator for this.

4.2 Folders within OpenIMS

4.2.1 Properties

You can change a number of properties such as name and description of a folder using the properties icon.

4.2.2 New folder

You can create a new (sub) folder with "New folder" ( ). At that point a dialog opens where you can enter the name of the folder. After you select "OK", OpenIMS will create the folder as a sub-folder of the folder you are currently in.

4.2.3 Favorites

To add a folder as a favorite, select "Add as Favorite" ( ). The relevant case is then added to the favorites (Via DMS | Per case).

4.2.4 Move folder

To move a folder, select "Move folder" ( ) and the move dialog will open. In this dialog you can choose a folder (or the root) using a combobox and move the selected folder there. After you select "OK" the folder will be moved.

4.2.5 Up / Down

Using the Up / Down icons you can move a folder one level up or down in the folder structure.

4.2.6 Sort

The sort option allows you to sort all folders in alphabetical order .

4.2.7 Local Security

If you have sufficient rights, you can put local security on folders. With this functionality, the folder or documents are protected from users to be selected. By clicking on this button a dialog appears and local security can be turned on. This can be identified because there is now a red dot on the folder . After that, the "Local Security" button will be changed to "Edit Security". Edit security When clicked, it is possible to adjust the security per user.

4.2.8 Remove folders

If you have sufficient rights, you can delete folders. A folder must not contain any sub-folders or documents if it is to be deleted. In the role of administrator you do have the right to delete a folder including subfolders and content.

4.2.9 Subscribe to folders and documents in folders

In OpenIMS you can subscribe ("Signalling") to folders and documents in folders. This means that the user will receive a notification (by e-mail) when changes are made to the folder or to documents.

By Folder

You click on "Folder Signalling" in the folder action block and can then choose for which folders and the interval.
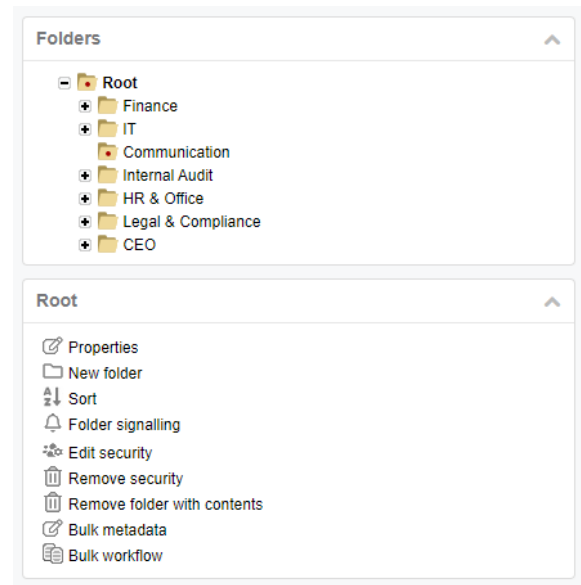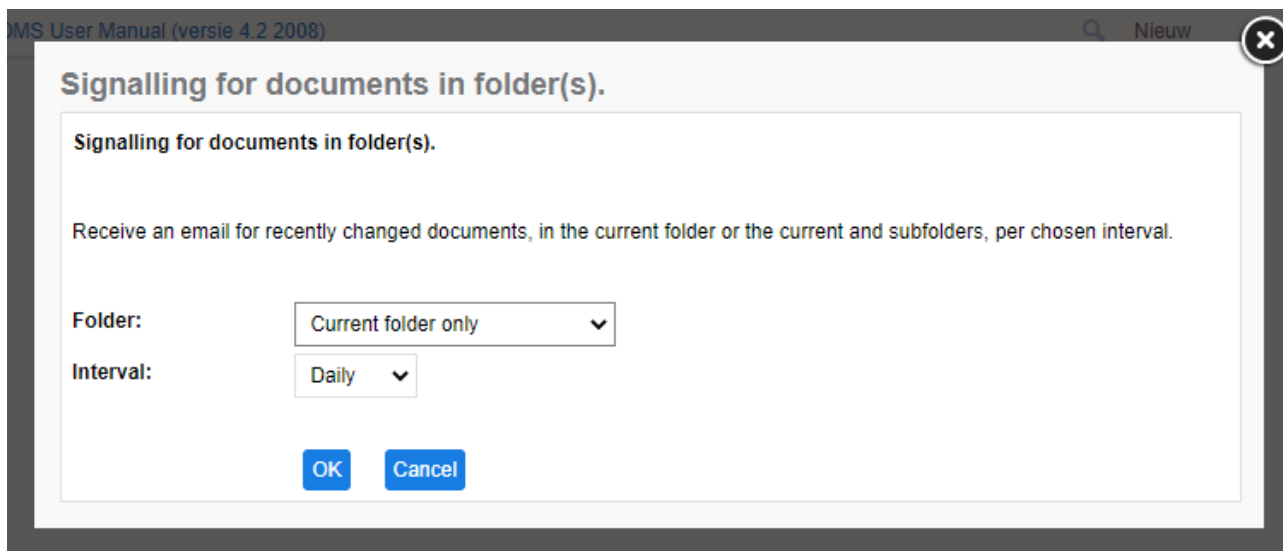
Per Document

You click on "Signal" 🔔 to subscribe to a document. This can be done before change, publication or status change.
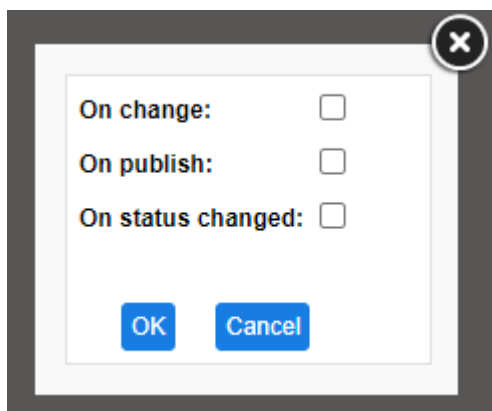
4.3   Working with (new) documents

The DMS contains a number of standard "blank" template documents as well as a number of customer-specific templates. When you want to create a new document, you first go to the folder where the document should be. You then select a document type from the **new document section** below the plus sign.

After choosing "New document" a dialog will open the "New document wizard" (see below) where you have to choose a template for the document. After confirming your selection, properties, such as document name and description of the document can be entered. The **workflow** is also assigned to the document in this step.
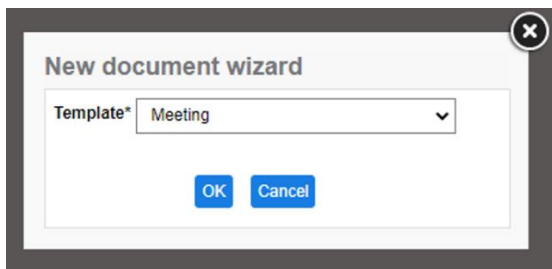
The document is then created in the active folder.

In addition to the option to add new documents to OpenIMS DMS based on a document template, you can place (upload) any existing document in the system. This is described in more detail in section 4.4.
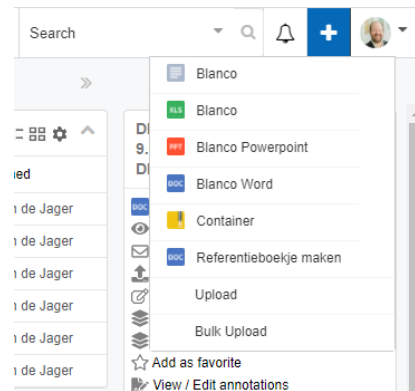
4.4 Document actions

If a specific document is selected in the document overview, the **document action section (1)** displays the actions that can be performed on the relevant document.

The following functions are available by default (1):

- Edit,
- View (read only),
- E-mail,
- Upload new version,
- Properties,
- History,
- Signal,
- Move[1],
- Published version / Preview version,
- Copy[1],
- Template,
- Delete file.

In the **document workflow section (2)** it is shown for the selected document which follow-up actions, defined within the workflow, can be performed. This includes actions such as approving, disapproving, publishing, archiving, etc.

The functions are explained in more detail in the following paragraphs.

---

[1] This function manifests itself in the Action menu or in the Document selection menu.

4.4.1 Edit (edit a document)

An important part is editing documents.

You can click on the icon of the document or on the "Edit" option in the **document action section** after which the document will be opened for editing (see image below).
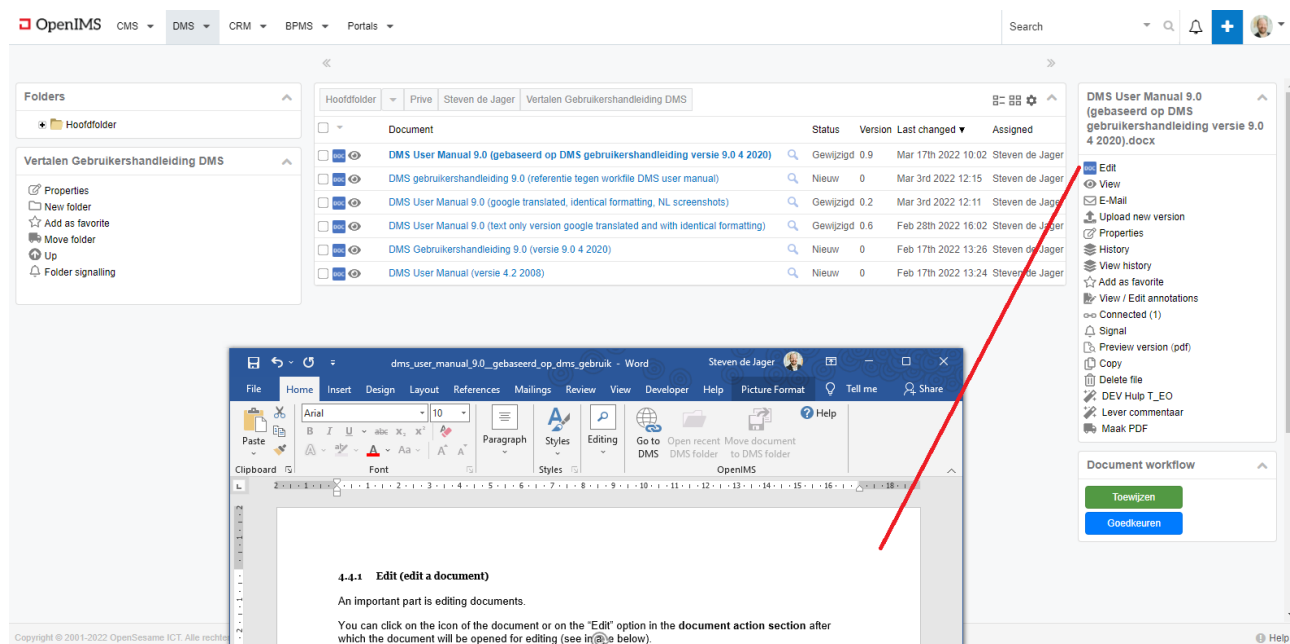
When you have finished editing a document, in this case a Microsoft Word document, close the document completely, including the Microsoft Word application itself. If you have changed the contents of the document, Word will ask if you want to save the changes when closing, when selecting "Yes" or "Save" the OpenIMS Transfer Agent ensures that the changed document is transferred to OpenIMS DMS.

Note: If you want to edit a document whose software you do not have locally available, you cannot edit the document.

4.4.2 Viewing documents

This function allows you to view a document as a read-only file.

4.4.3 Upload

Used for uploading a new version of an existing document that you have saved locally. You can also use this option when the OpenIMS Transfer Agent is not installed but still want the document to be updated in OpenIMS. See chapter 7 "Working without a Transfer Agent".

4.4.4 Properties (including metadata)

The meta information of a document is managed in the properties screen.
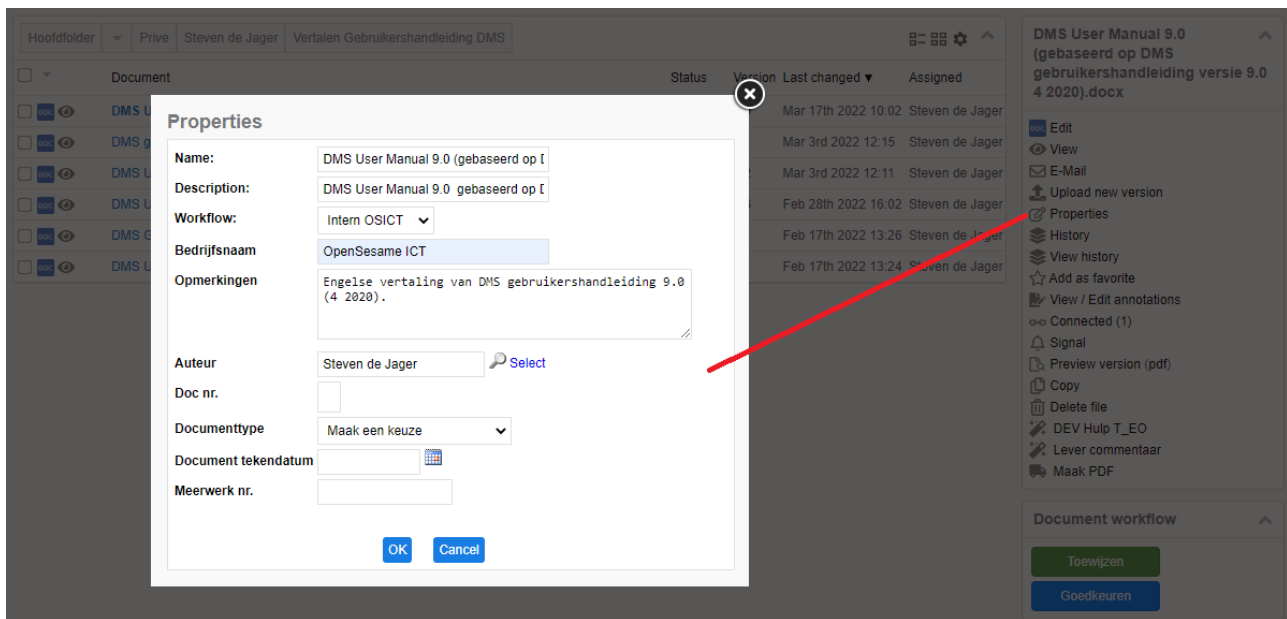
Properties have a number of standard metadata fields (Name, Description and Workflow), in addition, organization-specific metadata will be recorded. The specific metadata is determined by the workflow of the relevant document and is recorded by the administrator of the DMS.

4.4.5 History (version management)

This function allows you to view the history of a document. For each document, who has done what with the document and when. It is, as it were, a log of the document.

Viewing an old version   Read only version of the document
Restore to this version   Overwrites the current version
Hyperlink to this version

View changes between versions
By selecting two versions via the checkboxes and clicking the "Compare" button, you can view differences between the selected two versions.

4.4.6 Signal (subscription)

By selecting this function you will receive an e-mail notification with every change to the document for which you have activated the alert. You can activate the alert by checking the required options in the "Signal" menu option.

In addition, in your "Personal settings" (see chapter 5) you can get an overview of all documents for which you have activated the alert, This alert is strictly personal. Any user who has access to OpenIMS DMS and has the right to view the document can enable the alert.

4.4.7 Move documents

There are two ways to move documents to another folder: move here or move to folder. In regard to both methods, the documents to be moved must first be selected using the multiselect method (see chapter 7).

	Document	Status	Version	Last changed ▼	Assigned
☑ 🗋 👁	DMS User Manual 9.0 (gebaseerd op DMS gebruikershandleiding versie 9.0 4 2020) 🔍	Gewijzigd	0.9	Mar 17th 2022 10:02	Steven de Jager

Move here:
With this, the selected documents can be moved to the current folder.

Before the move function is available, you must first check the box for the document as shown above. You can also check multiple documents that should be moved to the same location.

First navigate to the folder to which the document should be moved. Then click on the move icon.   🚚 Move

A window will then appear (picture on the right) in which you must confirm moving your selection by filling in yes at the drop down menu and selecting "OK".

When several documents were selected, you will receive an overview for confirmation. The document(s) have now been moved to the appropriate folder.
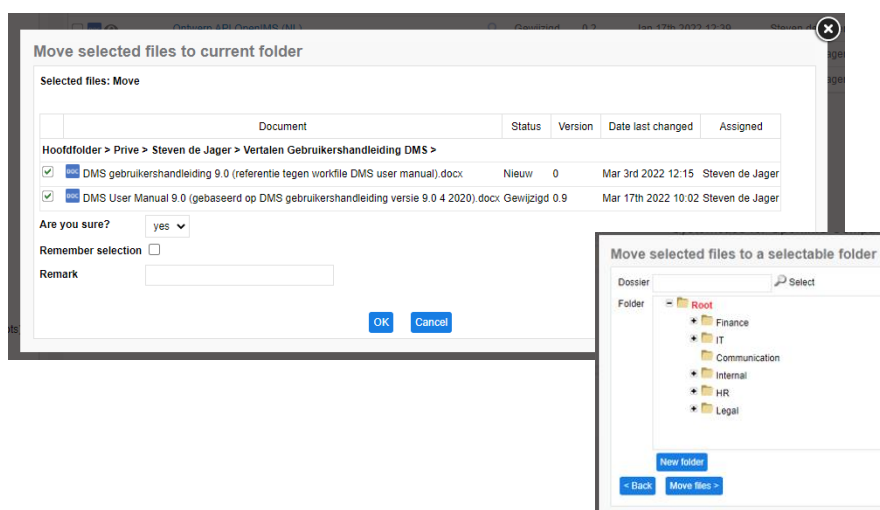
Move to folder
Using this option selected documents can be moved to a folder of your choosing. Before the move function is available, you must first check the box for the document as shown in the picture to the right. Then click on the move icon.

🚚 Move to folder
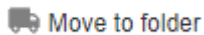
A combo box will then appear. By clicking on "Choose destination folder" you can select the destination folder. Then click on "Move".
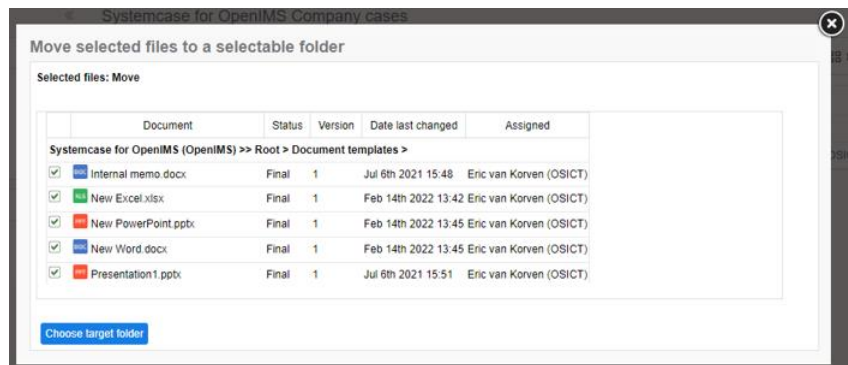
4.4.8 Preview / Published version

Each version of a document has unique hyperlinks. These hyperlinks will not change during the lifecycle of the document. In the image below, both the preview and published hyperlinks are available.
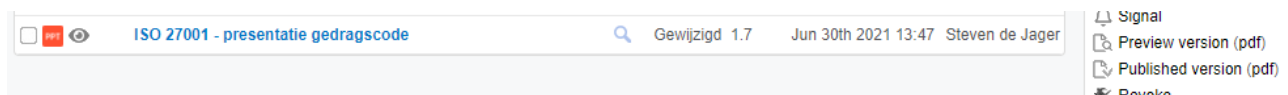
📄 Link to the **latest preview** version of the document.
📄 Link to the **latest published** version of the document.

The published hyperlink always links to the latest <u>published</u> version (not necessarily the latest version) of a document. The "preview" hyperlink does refer to the latest (edited) version of a document.

The hyperlinks can be used for many purposes. Think of the possibilities to send this by e-mail (instead of the physical document) or to use it to refer to a document from a CRM system.

E-mail a link
Today, many hundreds of documents are sent as attachments using e-mail within an organization every day. As a result, mailbox sizes are growing. By sending the url (hyperlink) to the document instead of sending the document, everyone always has access to <u>the latest published version of the document</u> without the actual document being sent.

Hyperlink in a web page
For example, the link function can also be used to create a link from an Intranet to a document in the DMS.

4.4.9 Revoke

This will make the last published version of the document current if changes were made to the document since that publication.

4.4.10 Copying documents

You can make a copy of a document using this function.

4.4.11 Delete documents

Using this function you can (provided you have the required rights) delete a document from the DMS.

4.5 Upload external documents

4.5.1 Using the upload screen

Navigate to the **new document section** and select the function "Upload". Select or drag the document or file you want to upload into the upload window (see image below) and upload it to the DMS.
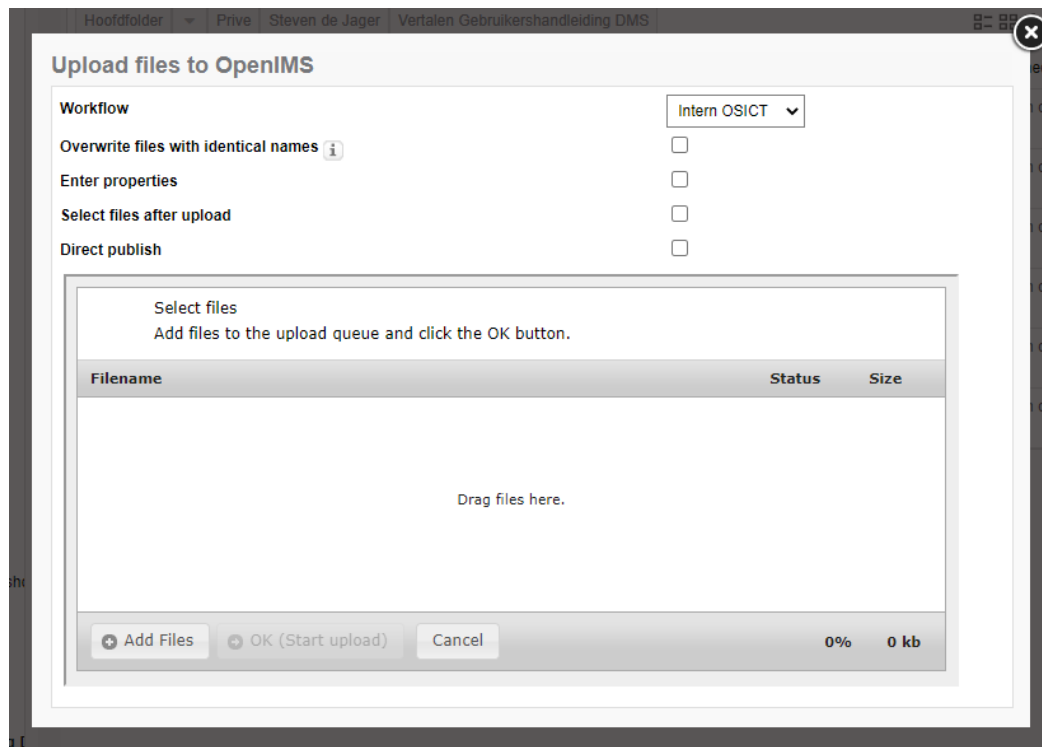
The name is derived from the file name of the uploaded file. You can call the upload function in any folder, uploaded documents will be saved in that folder. OpenIMS has a simple and an advanced upload facility. The image above shows the advanced upload screen. In this screen you can check the following items:

Option	Explanation
Workflow	Select from list of available workflows.
Overwrite files with identical names (the existing files keep their workflow and properties)	Ability to overwrite documents with the same name in the DMS.
Select files after upload	All documents are selected in the DMS after the upload action.
Direct publish	All documents are immediately final after the upload action

4.5.2 Drag and drop directly from the workstation

It is also possible to directly, without first selecting the "Upload" function, drag files to the DMS. When releasing the file(s), the upload screen as below appears automatically.

4.5.3 Selecting files

Multiple files
You can also move multiple files to the upload screen at the same time. You can choose to add files or the contents of a folder. After which you will be given the option to select files or a directory. This may also be files in folders on the network for which you are authorized.

Drag and Drop
After opening the upload screen, you can drag files from your desktop directly to the upload screen.
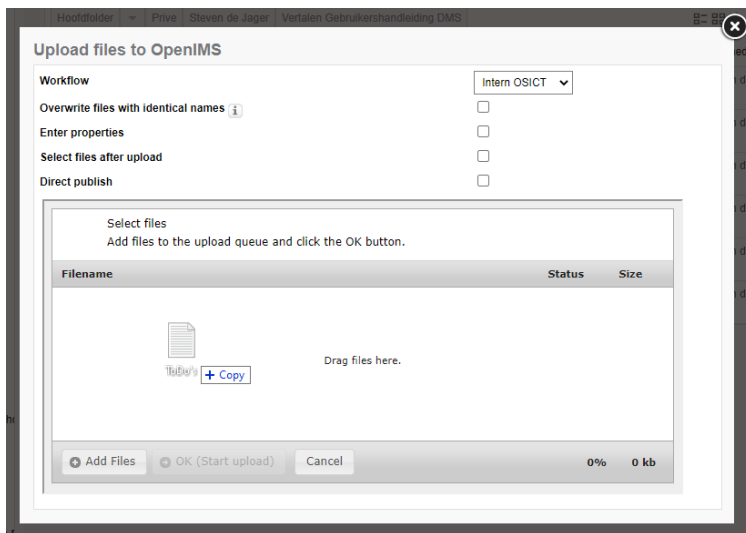
4.6 Navigating in OpenIMS

Within the DMS you can use the click path to see exactly which path you have followed to reach a specific document. See figure below (1).

1. Document (folder) path.
2. Document actions.
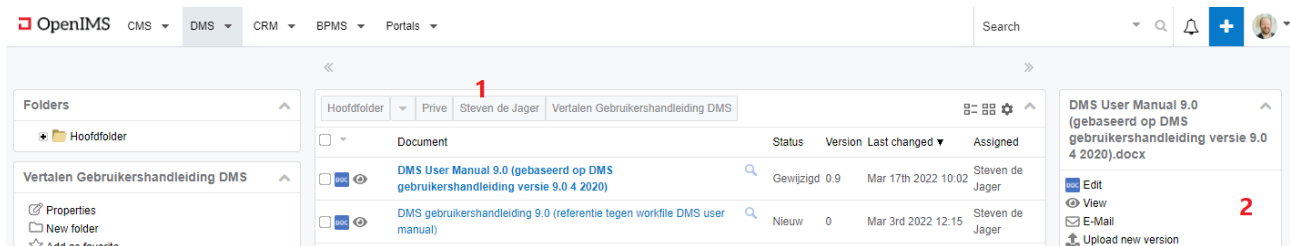
You are able to go back a few levels by using the click path.

4.7 Document multi-select functionality

Use this function when you want to select multiple files to move or download.

4.7.1 Select documents

You can select any document within OpenIMS by selecting it. In the image below you can see that four documents have been selected. You can also select documents from other folders. In this case, one document from the current folder and three from other folders are selected.

Using the function **Select folder** gives you the possibility to select all documents within the current folder and/or sub-folders. The title bar of the menu shows the total number of documents you have selected. When you click on 'select folder' you select the entire folder. Unselect a document results in the reverse action. With **Unselect all** you de-select all selected documents at once.
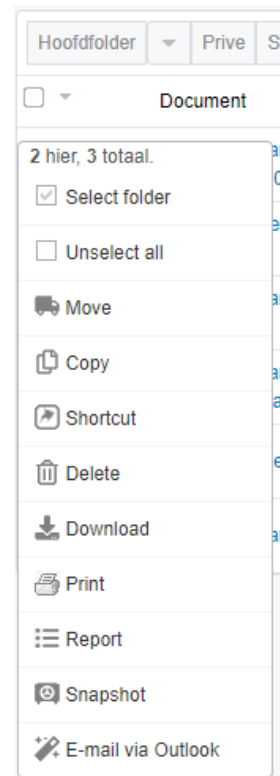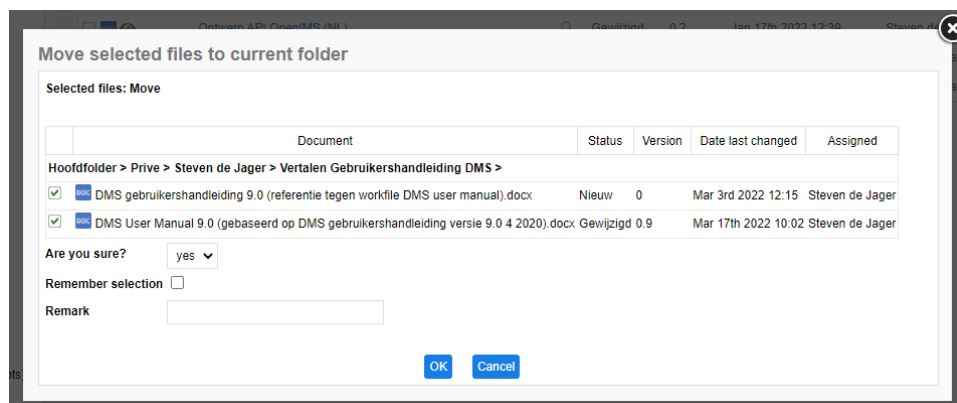
4.7.2 Move

This function allows you to move the selected documents from their current location to a new location. First select the documents you want to move and then go to the folder where you want to place all selected documents and select the function "Move". The system then provides an overview of all selected documents and asks if you are sure you want to move the selected files to the current folder.

If you check the box next to 'Are you sure?' to "yes" and then click on "OK", OpenIMS will move all files to this folder. If you check 'Remember selection', the files will remain checked after they have been moved. In the 'Remark' field you can place text that will be visible in the history with the move action.

4.7.3 Move (to folder)

This function allows you to move the selected documents from their current position to a new position. First, select the documents you want to move. You select the "Move to folder" function. The system then provides an overview of all selected documents and offers the possibility to select a target folder ("select target folder"). After this, a folder can be selected. By pressing "move" the files will be moved. If you had checked 'remember selection', the files will remain checked after they have been moved. In the comment field you can place text that will be visible in the history with the move action.
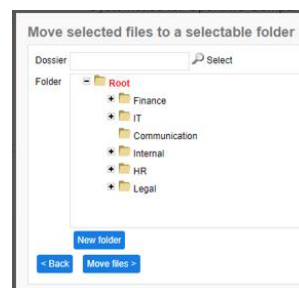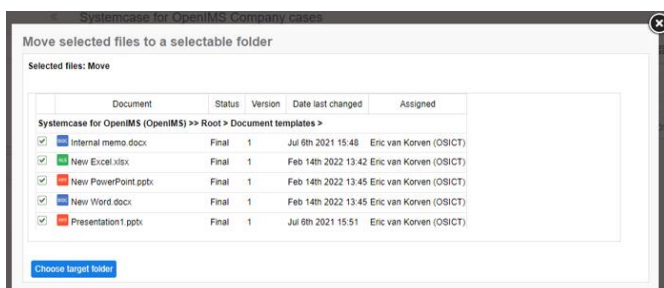
4.7.4 Copy

The copy function allows you to copy the selected documents and move them to another folder. First select the documents you wish to copy, navigate to the folder where you want to copy all selected documents and select the function "Copy". The system then provides an overview of all selected documents and asks if you are sure you want to copy the files. If you set the checkbox for 'Are you sure?' to "yes" and then click on "OK", OpenIMS will now copy all selected files to this folder. You can also copy the files in the same folder.

4.7.5 Shortcut

The shortcut feature allows you to include a link to a file in a different location than where the file actually resides. First select the documents for which you want a shortcut, navigate to the folder where you want to place the shortcuts and select the function "Shortcut". The system then provides an overview of all selected documents and asks if you are sure you want to make a shortcut of the files. If you set the checkbox for 'Are you sure' to "yes" and then click on "OK", OpenIMS will now create shortcuts to the selected documents in this folder. The selected documents remain in their original location. You can recognize the shortcuts by the icons for the documents in which, just like with MS Windows, an arrow is included (for MS Word, for PDF etc.)

4.7.6 Relationship (Connect) between documents

If configured, it is possible to display relationships between documents. You click on a document and then check one or more documents. Then the 'Connect' sign appears in the selection menu.

By clicking on this icon ⊶ Connect , the screen appears in which you can choose the relationship between the selected documents.
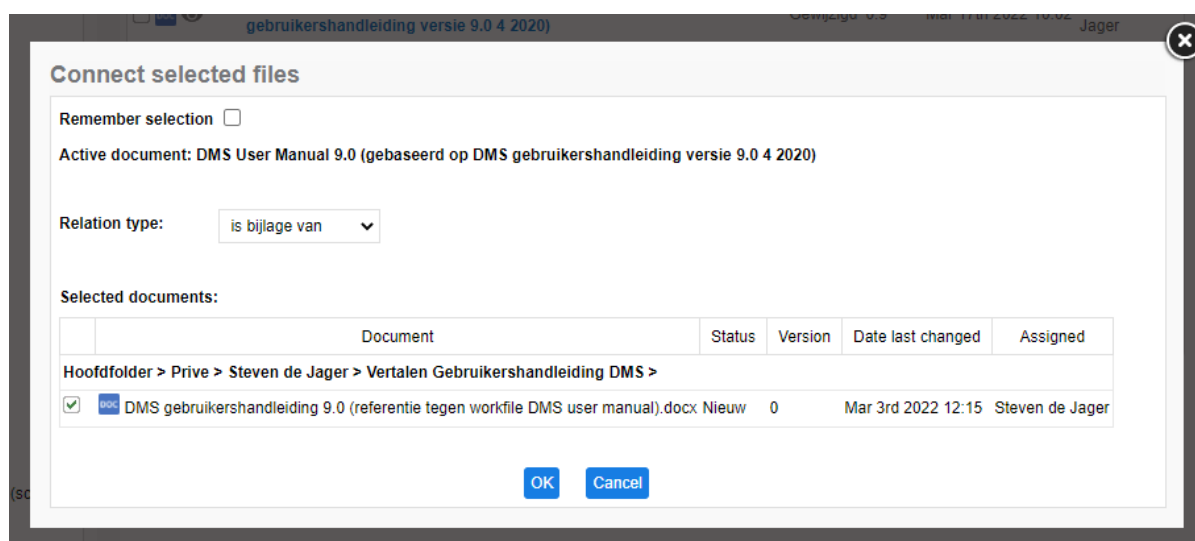
The relationships shown in the image ('is attachment of', 'has as attachments', etc.) are illustrative. These relations must be configured in the system configuration. When the relations are created, the connect icon is visible in the document action section. When clicking the connect icon, an overview appears with all relations to and from the selected document.

For example, to remove a document relation, the document needs to be highlighted and in the document menu there needs to be clicked on the "Connected" menu option.

⊶ Connected (1)

The related document(s) will then be displayed.

Connected documents of "DMS User Manual 9.0 (gebaseerd op DMS gebruikershandleiding versie 9.0 4 2020)"

Document 'DMS User Manual 9.0 (gebaseerd op DMS gebruikershandleiding versie 9.0 4 2020)' is bijlage van:

Document	Status	Version	Last Changed	Actions
Hoofdfolder > Prive > Steven de Jager > Vertalen Gebruikershandleiding DMS >				
DMS gebruikershandleiding 9.0 (referentie tegen workfile DMS user manual).docx	Nieuw	0	Mar 3rd 2022 12:15	

The following actions are available:

👁	"View" - View the document in view mode
🗀	"To base folder" - Navigate directly to the folder containing this document
➡	"Follow link"- Navigate to the linked document
🔗	"Remove link" – Remove the link / relationship

4.7.7 Delete

With the delete function you can delete a number of documents at the same time. You must first select the documents you wish to delete. Then select the function "Delete". The system then provides an overview of all selected documents and asks if you are sure you want to delete these files. If you set the checkbox for 'Are you sure' to "yes" and then click on "OK", OpenIMS will remove the selected files.

4.7.8 Download

If you want to compile a USB with documents or send a large set of documents to an external party, you can download the documents from OpenIMS DMS to your local or network environment.
OpenIMS creates a folder on your local machine for downloading the selected files.

4.7.9 Print (optional)

When enabled, this feature can be used to print all selected items to the user's ("default") printer.

4.7.10 Reports

This function provides an overview of the current selected documents, including the folder structure in which the documents are located.
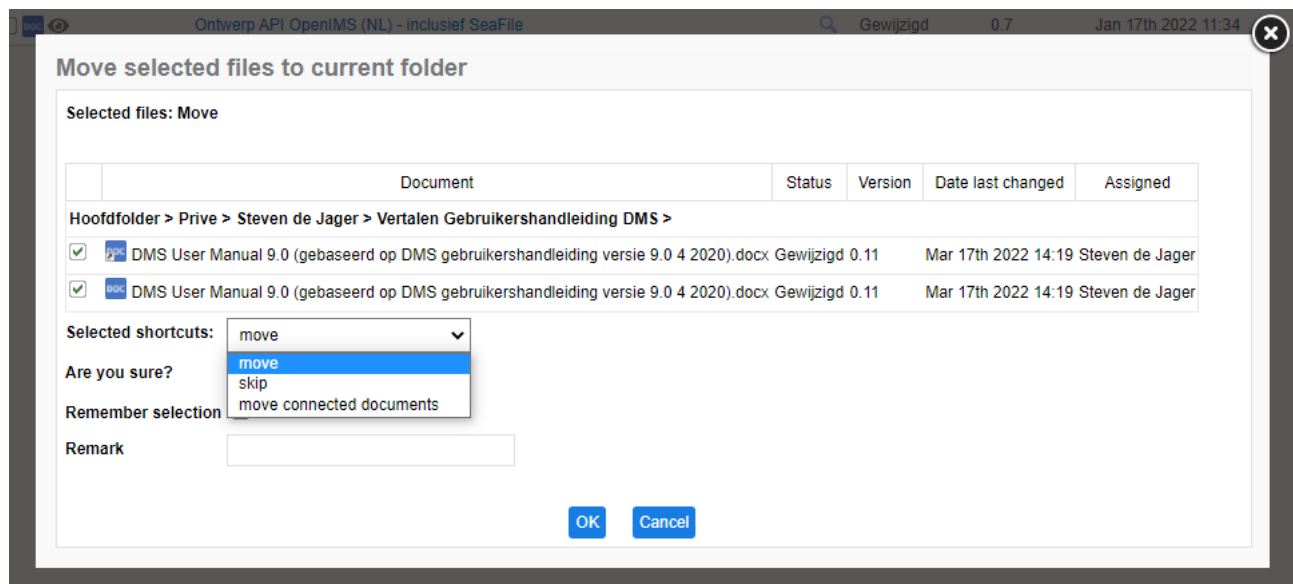
4.7.11 Snapshots

By means of a snapshot you are able to create a static overview of files in the current status and version. You can use a snapshot to record the status and version of all documents at a certain moment. For example when reaching a certain milestone within a project, so that you can later reproduce the status of the documents at that particular moment. A snapshot is in fact a report that consists of hyperlinks, all of which point to a specific version of a document. It is possible to save a snapshot locally as a file.

4.7.12 Move, copy and delete shortcuts

If you perform the move, copy, and/or delete operations on a number of selected documents of which one or more shortcuts are included, the system will ask in the overview screen what should be done with these shortcuts.

If the user does not have sufficient rights to perform the operation, this will be notified after clicking "Ok".

5 PROFILE SETTINGS

OpenIMS has a number of profile settings. These are described in this chapter.
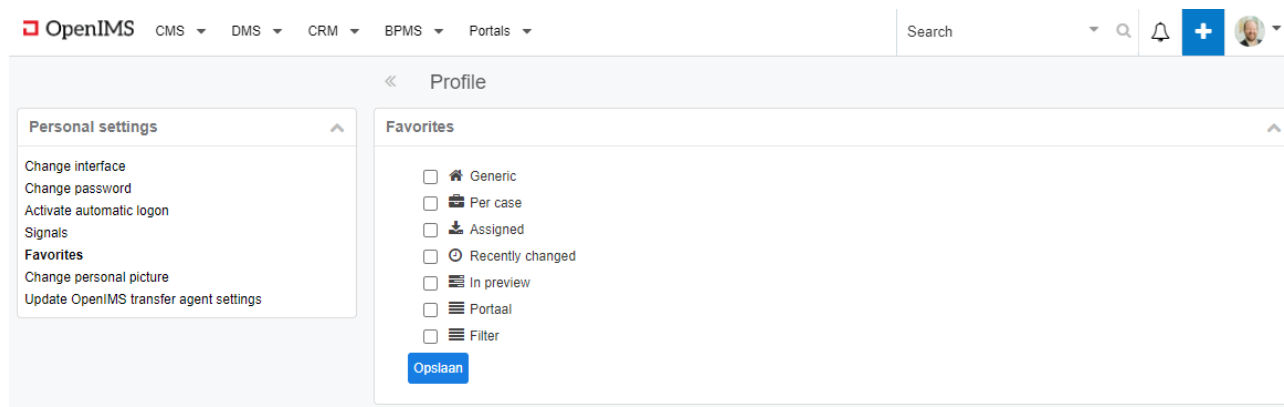
5.1 Change interface

This functionality allows you to change the interface (UI/screen layout) of OpenIMS.

5.2 Change password

If you want to change your password, you can select this option. A password should not be too simple, such as 1234. OpenIMS checks for that. A combination of numbers and letters, in total at least 6-8 characters, is generally a good method to use.

5.3 Activate automatic logon

If you work with OpenIMS, always from the same computer, it may be useful to activate automatic login. If you switch on your PC and log in to the company network, you no longer need to log in to OpenIMS.
This functionality is only available on the computer on which you activate this option. This means that you must also activate this function on another computer, if you want to log in automatically.
Note: if several people work with your computer (flex desk), it is advised not to use automatic login since there is a risk that others can use OpenIMS using your account.

5.4 Signals (subscription) overview

This is an overview of all documents for which you have enabled signals. It is possible to disable an existing signal from this overview.
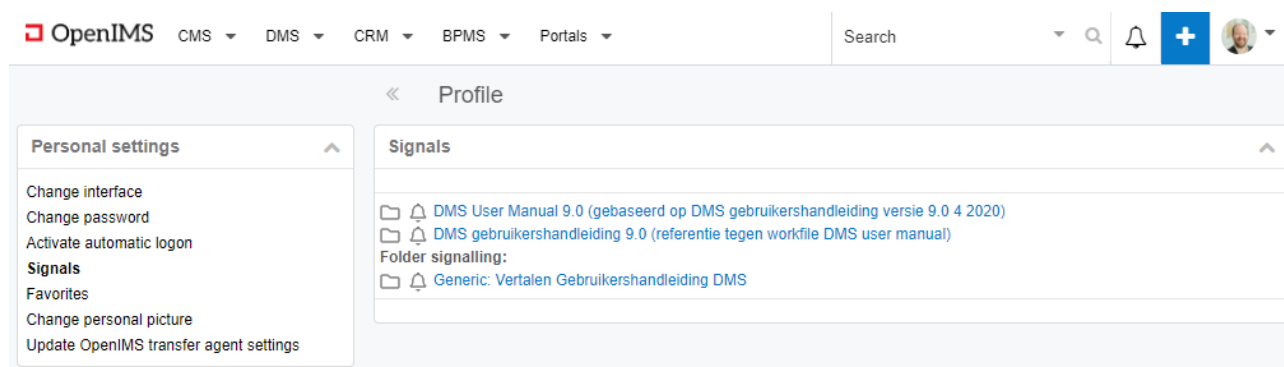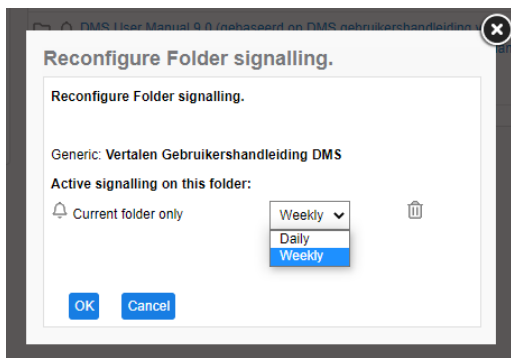
By choosing the folder icon you can go directly to the relevant document. Use the bell icon (🔔) to adjust the signals.

5.5 Update OpenIMS Transfer Agent settings

With this option, certain settings that the OpenIMS Transfer Agent needs to function properly are set by OpenIMS. See also the OpenIMS Transfer Agent below.

5.6 Tracking list

An overview of the documents on the tracking list can be obtained by clicking on "Profile" and then on Tracking list.
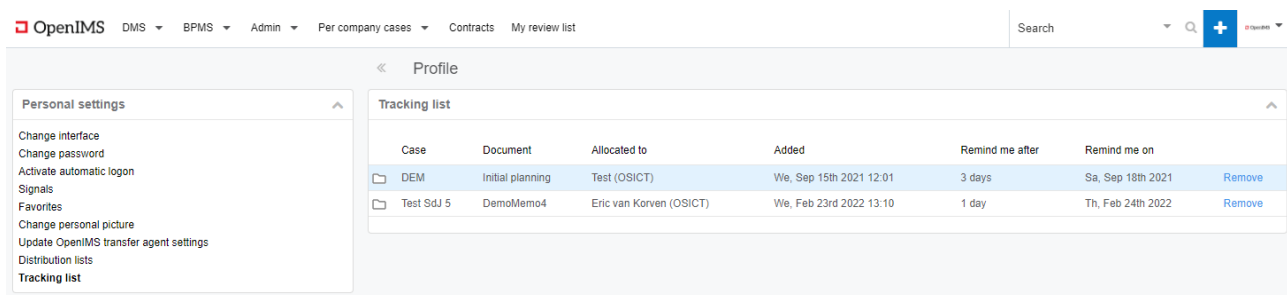
In this overview there is also the option to remove documents by clicking on "Delete" in the line of the document.

At each workflow transition, a document can be added to a personal tracking list by the user. If a check is placed at "Put on my tracking list", a field "Remember me after" will appear, where a period can be selected to alert the user to the document.
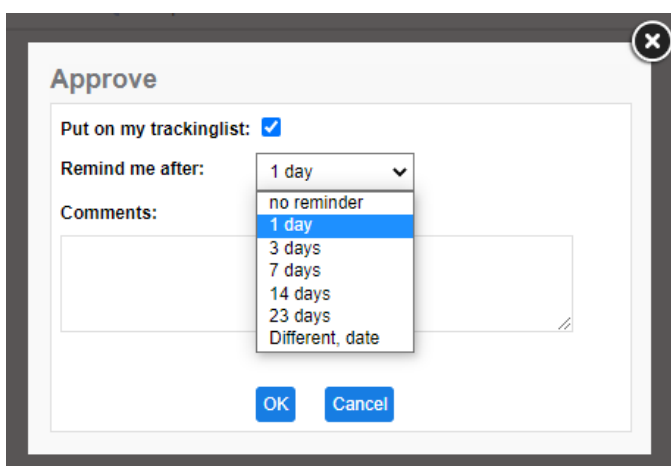
A period can be selected that draws your attention to the document on your watch list.

5.7   Change personal picture

To personalize your DMS, it is possible to add a photo under "Change personal picture". This photo is also shown in the history of documents.
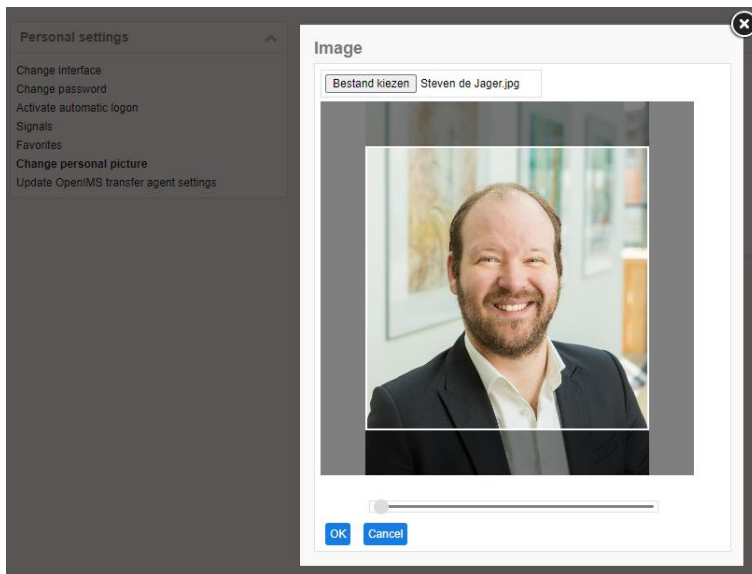
5.8   Personalize the DMS bar

In OpenIMS it is possible to indicate under "Favorites" which functionalities you want to show additionally in the DMS bar. In below example "Post processing" has been chosen to show in the DMS bar. The order of the additional functionalities to be displayed can also be changed.
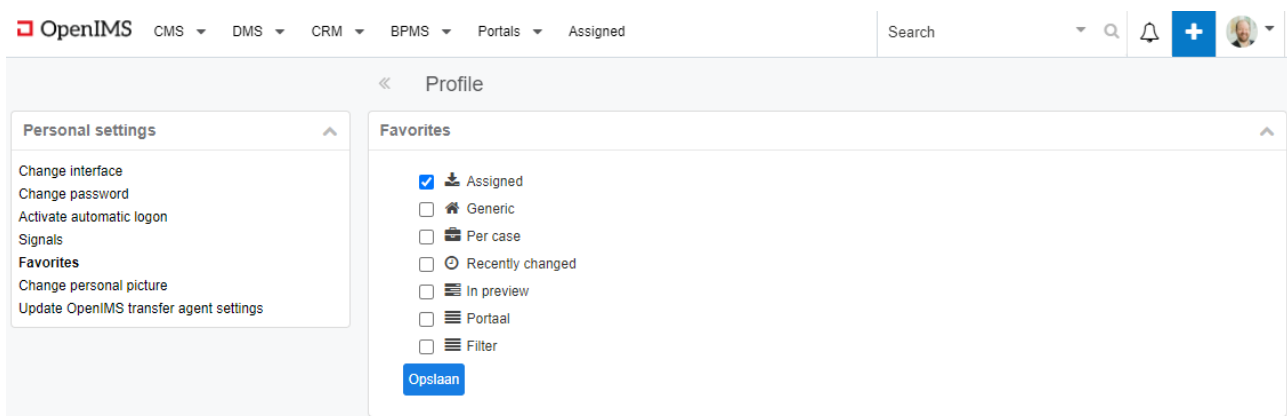
6 OPENIMS TRANSFER AGENT

Before you are able to edit documents with OpenIMS, you first need to install the OpenIMS Transfer Agent. The OpenIMS Transfer Agent is an application from OpenSesame ICT, which is intended for the automatic downloading and uploading of files to and from OpenIMS. The Transfer Agent ensures that these operations are facilitated for the user.

OpenIMS has built in multiple security mechanisms to prevent information from being lost, if for whatever reason the file is not properly stored in OpenIMS. It is important to use these mechanisms correctly.

6.1 Install OpenIMS Transfer Agent

The OpenIMS Transfer Agent is installed locally. The latest version of the OpenIMS Transfer Agent can be downloaded from the OpenIMS Website (exe, msi) or via the following URL:
http://<yourwebsite>/OpenIMS/setup.exe.
The last option is mainly intended for installation on clients that do not have an internet connection.
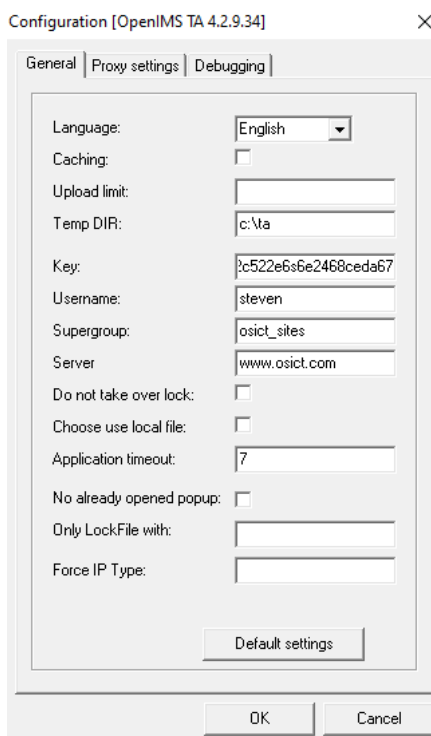
6.2 Configuration

The settings of the OpenIMS Transfer Agent can be found on your computer via 'Start -> Programs -> OpenIMS -> Configure Agent'.

6.2.1 General tab

Language: Configure the desired language of the Transfer Agent.

Caching: Indicate whether OpenIMS should keep a local copy of files on the client. Disabling the cache can be useful on shared systems but has a negative impact on performance.

Upload limit: Specify the maximum packet size with which the Transfer Agent sends files. This is especially intended for proxy servers that have certain requirements regarding the size of network packets (packet size).

Temp DIR: Specify the local directory of the Transfer Agent. By default, this uses the location that is set for the user on the client as the 'environment variable' %tmp%.

Key/Username/Supergroup/Server: These settings are used for the MS Outlook connection and varies per user. These settings are configured via the DMS by clicking Update Transfer agent settings (see under personal settings for this).

Do not take over lock: If checked, users are not allowed to edit documents that are already being edited by someone else (checkout).

Choose use local file: Determines behaviour of the transfer agent when the local (stored in a tmp directory) version differs from the server version, for example because a previous upload failed. The default behaviour is that the user is allowed to choose whether to edit the local version or the server version. If this option is checked, the local version is always used and the selection possibility will not appear on-screen.

Application timeout: If office applications such as Word start slowly, this can be indicated here.

Use SSL: Allows a secure connection to be established between the Transfer Agent and OpenIMS DMS.

No already opened popup: Provides a notification if the document is already opened.

Only LockFile with: Can contain comma separated extensions (doc, docx etc.). Whether or not documents are opened from OpenIMS, they are opened with a process. This is, for example, a Word or Excel process. A lock is also added when a document is opened from OpenIMS. In some word processors, multiple documents can be opened under one process. This allows documents that are closed to be sent back to the DMS, while the process remains active. This setting ensures that only the lock is looked at and not the process. The process remains active and the lock is "discarded". This allows the process to continue and the document that was closed is sent back to the DMS.

Default Settings: This resets the general settings for the Transfer Agent to default settings.

6.2.2 Proxy Settings Tab

Automatic: Specify whether the Transfer Agent can automatically detect the proxy server and associated settings.

Address: Enter the IP address of the proxy server.

Port: Specify the port of the proxy server to use.

Username: Enter the user name to connect to the proxy server.

Password: Enter the password that allows the configured user to connect to the proxy server.

Basic authentication: Indicate whether this form of authentication should be used. (Note, the Transfer Agent does not support NTLM authentication.)

Upload on IP: The Transfer Agent uses the IP address instead of the domain.

No proxy for: Specify which IP addresses or domain names are accessed without using the configured proxy server.

Default Settings: This will populate the default proxy settings for the Transfer Agent

6.2.3 Debugging Tab

Debug mode: Specify whether the Transfer-Agent should display debug information while running.

Debug log: Indicate to which file debug information is written by the Transfer-Agent.
(eg c:\OpenIMS-debug.log)

Profile mode: Specify whether the Transfer-Agent should collect profile information at run time.

Profile log: Indicate to which file debug information is written by the Transfer-Agent.
(e.g. c:\OpenIMS-profile.log)

Default Setting: This will fill in the default debugging settings for the Transfer-Agent.

6.3 Using the Transfer Agent

6.3.1 Save to OpenIMS

Opening a file (eg to edit) is controlled with the functions available in OpenIMS. These functions ensure that the file is opened using the Transfer Agent in the correct application in accordance to the client settings.

It is recommended to check whether the file has been successfully returned to OpenIMS when closing a file. This can be checked by the version number and the date and time of the last modification (these are automatically updated in OpenIMS). During editing, the user can choose to save the file in the meantime, by clicking on "save", for example in MS Word.

Note: If the MS Word OpenIMS plug-in is <u>not</u> used, if you choose 'Save as' in MS Word (or another application), the Transfer Agent will disconnect the OpenIMS server. The consequence of this is that changes are not or only partly saved in OpenIMS.

If a user opens a file to edit but nothing changes, the upload is skipped.

6.3.2 Safety Mechanism

In case something goes wrong, for example the connection to the network is temporarily lost, it does not mean that the user has lost changes to the document. The moment the user (at the same workplace) changes the document again from OpenIMS, the Transfer Agent will detect that something has gone wrong and suggest the user to use the locally stored file (= the latest version).
The user will be notified of this. Then choose OK.

This message will only appear once. The user should select "Ok" to ensure that no information is lost and may continue working with the local file. The user may also choose "Cancel" to use the file currently in OpenIMS.
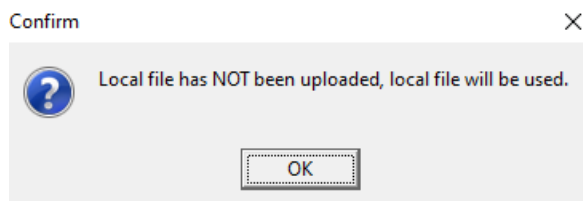
6.3.3 Change at the same time

A user may want to modify a file that is already being modified by another user. Since a file cannot be changed by multiple users at the same time, you will receive a notification. Note: This does not apply to reading a file.
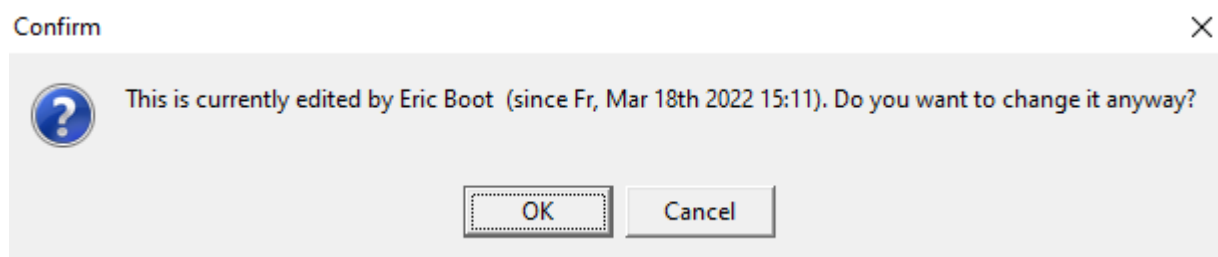
It is recommended that the user choose "Cancel" and wait for the file to be released in OpenIMS. The user may also contact the respective user.

The user may also click "Ok" to change the file anyway based on the version of the file as it is currently in OpenIMS. The version control of OpenIMS ensures that when saving the opened files in OpenIMS, all files of all users are saved. Versions are stored in OpenIMS in the order the files are closed by the users.

It is possible to configure the Transfer Agent to change this notification to just "Ok" (see settings above) effectively choosing not to modify the file while it is opened by another user.

6.3.4 Frequently Asked Questions

This section contains a functional / technical explanation of frequently asked questions about the OpenIMS Transfer Agent.

- **What exactly does the "caching" setting do?**

When a file is opened from OpenIMS, whether for reading or editing, a copy of the file is placed in the Windows designated temp\OpenIMS folder on PC or laptop. The location of this folder is not determined by OpenIMS, but by Windows. Usually this is C:\Documents and Settings\%USER%\Local Settings\Temp\OpenIMS.

All operations, including interim saving, that the user subsequently performs with the file (for example also Microsoft Word "autosave"), are performed on this file.

With the "caching" setting it can be determined whether once the user has finished reading/editing and the file has been successfully closed and/or saved in OpenIMS, the working file (tmp) should be deleted. If caching is checked, the files will remain local. When caching is not checked, the files are removed from the temp folder. (from Transfer Agent 767 or later). OpenIMS does not delete the file until it has been verified that the file has been successfully saved in OpenIMS. If, for whatever reason, the file upload fails, the file will not be removed from the temp folder and the user will be able to use the security mechanism described earlier in this document.

When caching is unchecked and the file is saved in OpenIMS there is no safety mechanism for all possible errors that occur in the saved working file. In other words: a Word file can for example be damaged internally, but still be saved successfully. In such a case, if caching is not enabled, there is no local version to fall back on and the user will have to restore a previously stored version in OpenIMS. Word's autosave feature uses the same working file as OpenIMS.

Caching also has the effect of improving performance if files are accessed more than once a day.

- **How does the Transfer Agent check if a file is properly stored in OpenIMS?**

When the user is done with a file, the Transfer Agent does the following:

1. The Transfer Agent requests information from the file in OpenIMS, including any auxiliary files and the associated "checksums".
2. The Transfer Agent sends the files to OpenIMS skipping files that are identical on the server and locally.
3. The Transfer Agent again requests information from the file in OpenIMS, including any auxiliary files and associated "checksums". If there are any discrepancies between the local version and the version on the server, the error message "Sending failed". If the transmission is successful, the checksum of the document is stored locally.
4. The Transfer Agent sends a signal to OpenIMS indicating that the file has been saved successfully and that the agreed actions can be performed.

6.3.5 How does the Transfer Agent interact with Microsoft Word's "autosave"?

All operations, including intermediate saving, that the user performs with a file, for example also Microsoft Word "autosave", are performed locally on a file. The 'save' button will save your changes to the local file. Autosave ensures that your changes are saved in a file with a '~' in front of the name.

If something goes wrong in Word, Word uses the file that starts with '~' before the name, in the same folder where the document is located. When you open the document again, Word will detect these temporary files and offer the user certain recovery options. This works the same when the document is started by the Transfer Agent. Be noted that caching must be turned on, because otherwise a successful save will save the 'crashed' file and remove the files from the temp folder to recover the crash.

There are also other (temporary) files that Word can leave behind, more information is available in the Microsoft manuals: http://support.microsoft.com/kb/211632.

7 WORK WITHOUT TRANSFER AGENT

To be able to use all functionality made available in the DMS, a user needs the OpenIMS Transfer Agent. In some situations, for example from an internet café at your holiday address, it is not possible to install and use this software (provided you use a computer installed there).

Nevertheless, it is still possible to work with OpenIMS DMS in these kinds of situations, albeit with some functional limitations. The main difference is the manual download and upload, which is normally performed in the background by the Transfer Agent.

This chapter explains which actions you must perform in order to be able to work with the system in these situations.

Note: Check-in and Check-out (reserving the document) is also handled by the Transfer Agent. This functionality is therefore not available in this situation.

7.1 Download

If you want to edit a document, you need to select the option "Published version" or "Preview version" in the **document actions section**. The relevant document will be retrieved (downloaded) and opened using your browser. You can now edit the document locally. Note: If you close the browser, the changes made are not saved automatically, you will first have to save the relevant document locally (on c:\ for example) and then upload it again in the DMS (see below)

You can also first download and save the document and then edit it. Right-click on the desired version link (preview or published) and select the option "Save Target As" or "Save Link As…" to download the document and save it locally. You can then open the document within, for example, Word.

7.2 Upload

When you finished editing, you can transfer the document back to the DMS via the "Upload new version" function from the **document actions section**. The new version of the document is then uploaded to the DMS.

The history mechanism allows you to view the differences between the different versions.
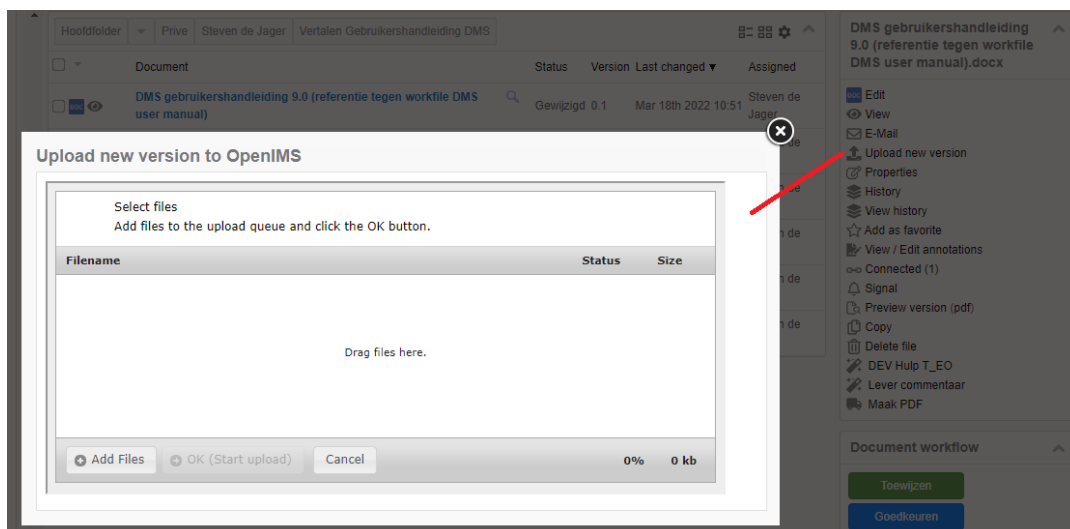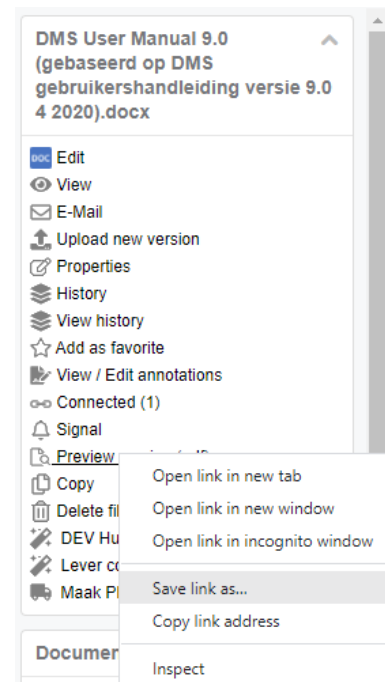
8 OPENIMS OUTLOOK ADD-IN

A plug-in is available for organizations that use Microsoft Outlook. This will be visible in Outlook in the 'Add-ins' bar.

8.1 Client specifications

An OpenIMS® user (client) must have at least:

- Microsoft Outlook;
- Microsoft Windows;
- The OpenIMS Transfer Agent.

The OpenIMS Transfer Agent takes care of the transport of the e-mail (and attachments) to and from your local PC.

Also, to use this plug-in, the system administrator must have installed the additional software as described at http://doc.openims.com.

8.2 Activate Client settings

Every user must activate the correct settings before using the OpenIMS Outlook plug-in. These settings must be activated once per user.

1. The user concerned must log in to OpenIMS DMS environment.
2. After the user has logged in to OpenIMS DMS, he can choose the option "Profile".
3. Click on the left side on the text "Update OpenIMS transfer agent settings". Your settings are now configured.

Note: You must have the OpenIMS Transfer Agent already installed before performing this activity.

8.3 Registration e-mail

A user can register an e-mail or an attachment(s) in OpenIMS DMS from within Microsoft Outlook.

8.3.1 OpenIMS Outlook registration interface

The registration of both received and sent e-mail messages is done through the same user interface.
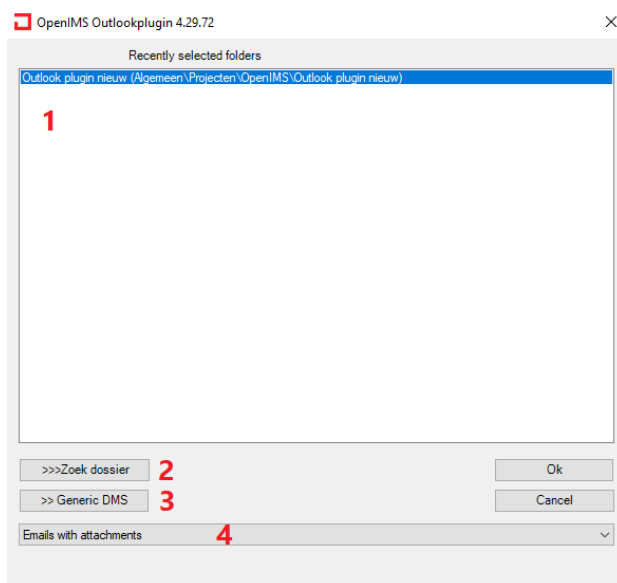
1. An employee can choose from the last 10 selected cases that have recently been used to store an e-mail message.

2. Provides the option to search for a project / file.

3. Provides access to the folder tree of the General folder section within OpenIMS DMS.

4. You can use the selection to indicate what you want to save:

- E-mail with attachments (selecting this option will save the e-mail including attachment in OpenIMS);
- E-mail (also delete), is the same as above, additionally the e-mail is also deleted from MS Outlook;
- Attachments: Only the attachments are registered, the plain text of the e-mail is not registered;

- E-mails with attachments separately: Both the e-mail and the attachments will be saved separately. In the DMS, both the e-mail and the attachments have a functional link with each other. In addition, the attachments can be checked and unchecked in the dialog box. This prevents non-relevant attachments (e.g. logos, etc.) from being registered:
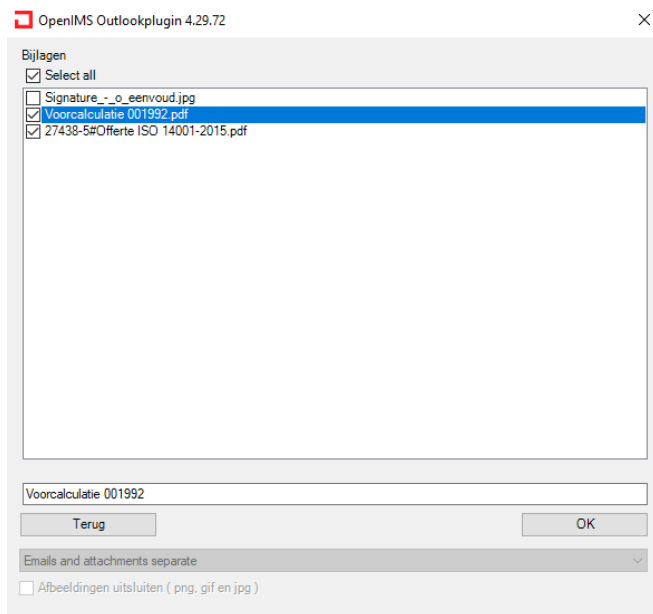
It is also possible to rename the attachment. When an attachment is selected, the name is shown in the dialog where it can be edited.
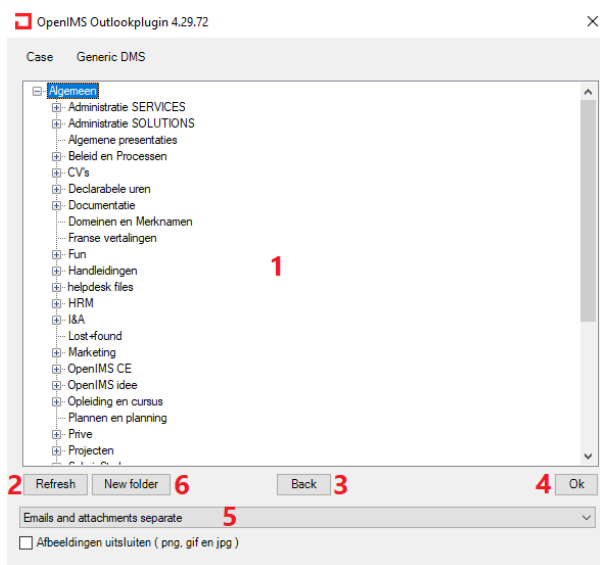- E-mails without attachments: Only the plain text of the e-mail is recorded. The attachments are not taken into account.

8.3.2 Working with the '>> General DMS' button

After clicking >> Generic DMS, the general folder tree is displayed.

A user can now select the folder in which the relevant e-mail message should be placed via **(1)**.

If the user chooses **(2)** "Refresh" then the general folder tree is reloaded.
(3) Returns to the start screen and at **(4)** the relevant e-mail is sent to the selected DMS folder.
At **(5)** you can still choose what should be saved. (the same options as in section 8.3.1 are available here).
Optionally, the user can add a new folder to the DMS **(6)**.

8.3.3 Working with the '>> Find dossier' button

After choosing the >>Find dossier button the dialog shown here is displayed. If you have previously visited a certain file / project, the dialog will show it.
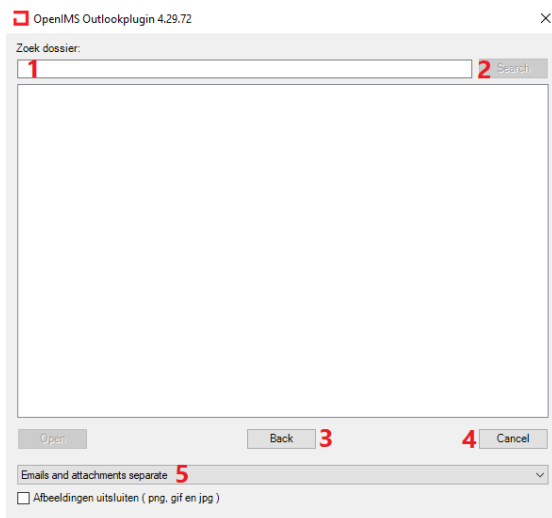
1. Search field, you can also search for parts of the name of a case here.
2. Start the search.
3. Back to the start screen.
4. Close the search screen.
5. Here you can choose what should be saved. (the same options as in section 8.3.1 are available here)

After starting the search, the interface looks like this:
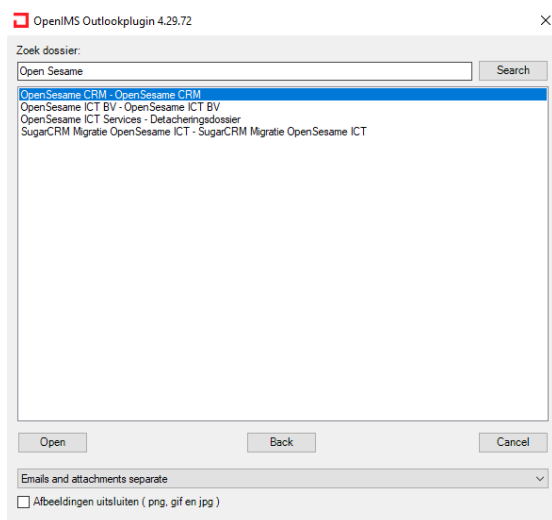
1. Click on the file name.
2. Choose "Open" to view the folder tree, or perform a new search. You can close the respective dialog by clicking Cancel.
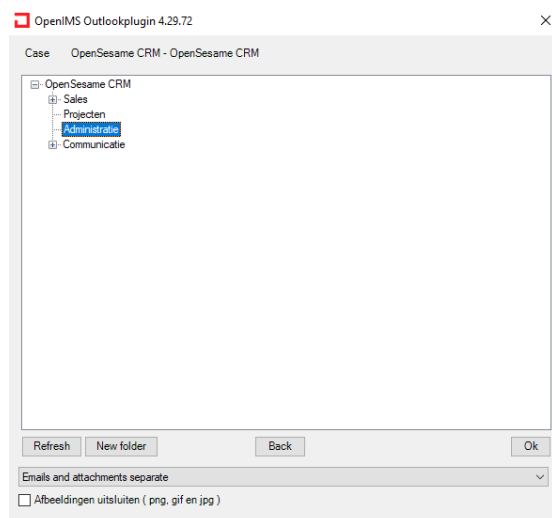
After the case has been loaded, you can navigate to the folder in which you want to place the relevant e-mail.

Select "Ok" to initiate the action.

Select "Back" to search the list of cases again.

Choose "Refresh" to get the folder tree again.

8.3.4 Registering received e-mails (using the ribbon)

1. Select the e-mail you want to register in the DMS.

2. In Microsoft Outlook choose the button "Copy e-mail to DMS folder"
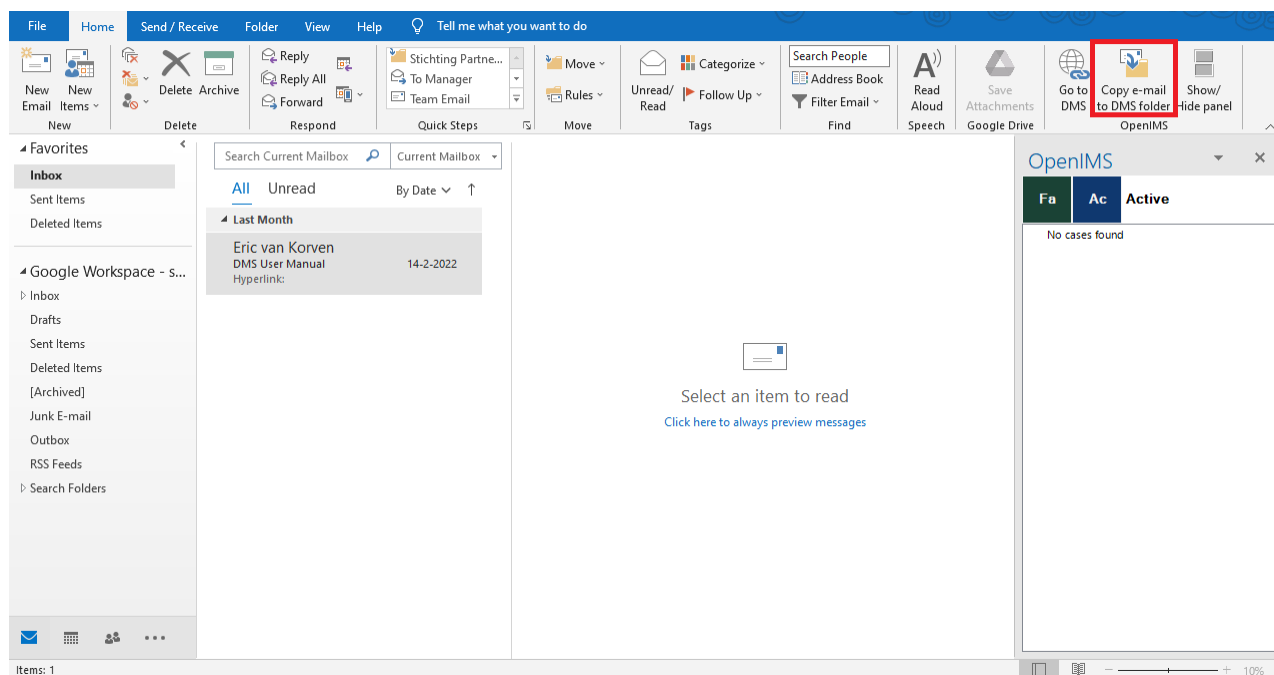
3. After this, the OpenIMS registration dialog is started and the e-mail is saved in the DMS after the necessary choices.

4. After registering an e-mail in the DMS, the received e-mail is marked with a Microsoft Outlook flag.
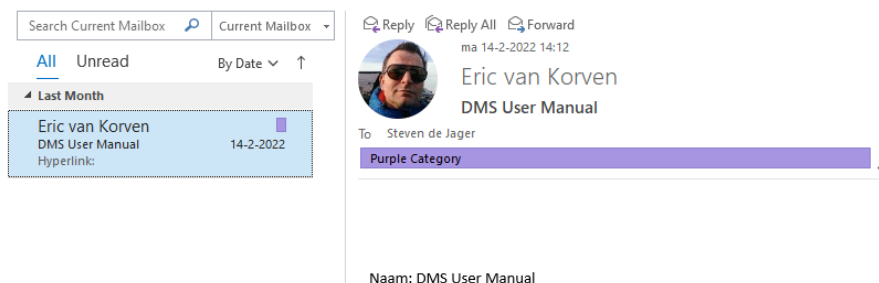
8.3.5 Registering received e-mails (Using the Favorites Panel)

1. Select the e-mail you want to register.

2. Drag it to the relevant folder of the relevant case.

3. When you release the e-mail, the registration screen starts. The e-mail will be copied to the selected folder.
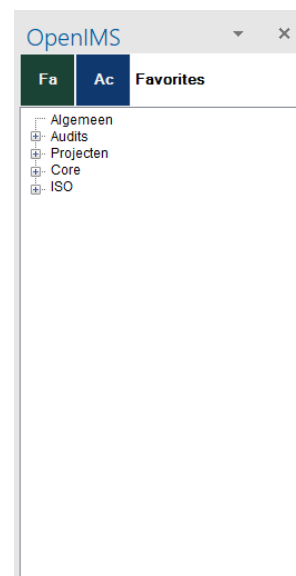
8.3.6   Registering sent e-mails

Every time you send an e-mail with Outlook, you will be asked just before sending whether the e-mail in question should also be saved in the DMS.

If you choose "Yes", the dialog box from the previous paragraph will be started, if you choose No, the dialog box will close. The e-mail will be marked with a coloured flag in Microsoft Outlook and is being registered in the DMS.

Post-registering a sent message
If you have chosen No, but still want to register the e-mail afterwards, you can choose the button from the previous paragraph (from the sent items folder in Outlook).

8.3.7   No connection to DMS server

If no connection (working offline, working from home) with the relevant OpenIMS DMS Server can be made, the plug-in will disable itself. To reactivate the plug-in, close Outlook and restart it.

8.4   Sending DMS documents (attachments) via Outlook

In addition to registering e-mail, it is also possible to send documents from OpenIMS DMS via a OpenIMS DMS assistant.

Note: to use this facility Outlook must be started on the local PC of the user in question.

1. Log in to the OpenIMS DMS.
2. Select the documents you want to send by ticking them. You may select multiple documents. In the "Documents" block at the bottom right, an option will appear to e-mail the selected documents.
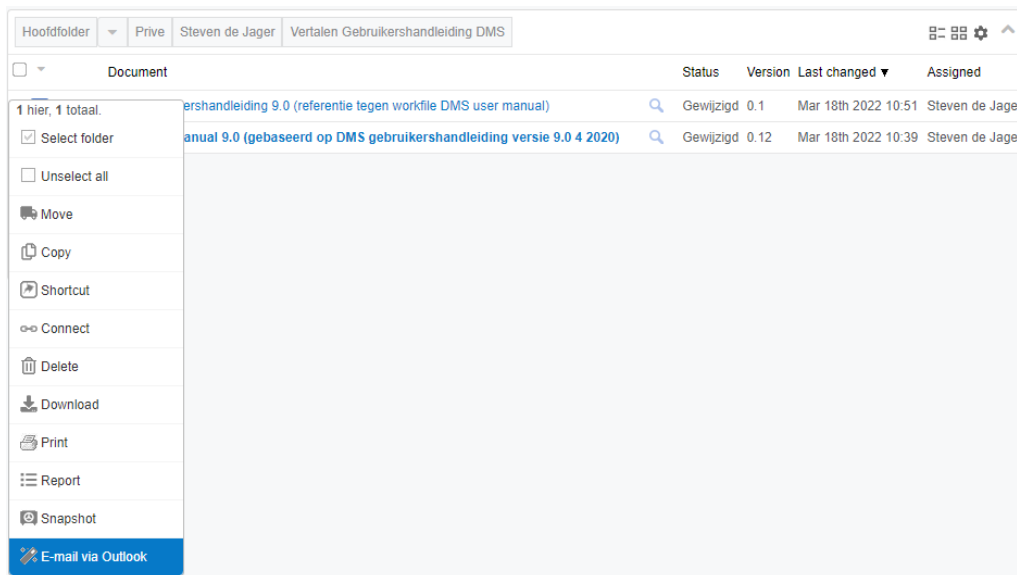
3. Select the assistant "E-mail via Outlook", a new screen will open that shows the selected documents and provide various options.
4. You may indicate how Outlook should send the documents, as a physical attachment or as a hyperlink.

5. You may edit / enter the "Subject" (subject).
6. Choose "OK" to let Outlook generate an e-mail (the OpenIMS Outlook plug-in needs to be installed). As a result, an e-mail will be opened containing the appropriate attachments.

   From here on you process the e-mail via Outlook. Registration of the sent message in OpenIMS DMS is also a possibility.
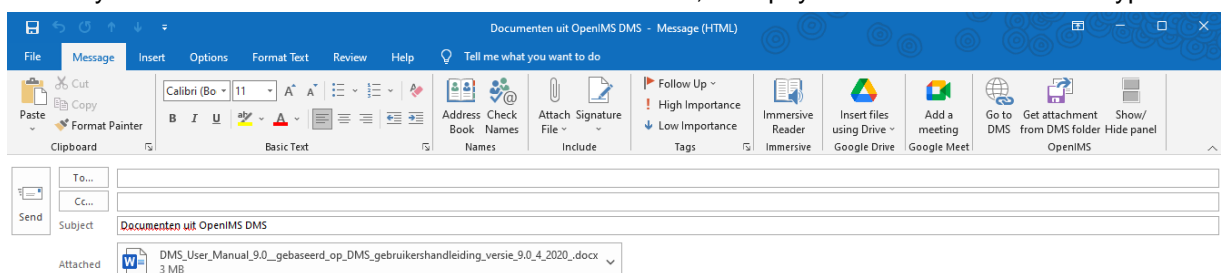
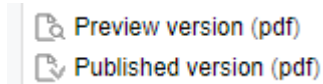# 9 SPECIAL FUNCTIONALITY

9.1 Working with AutoCAD Xrefs

From within AutoCAD it is possible to use existing drawings in a new drawing using an Xref link. OpenIMS supports this functionality. This ensures version control for both source as target.


To place an existing drawing as part of another drawing using the Xref manager, the user must use the hyperlink to the published or concept version of the drawing.

From within OpenIMS, first select the source drawing that should be placed as Xref in another drawing (see figure above).

Use the right mouse button in the "Document Actions" menu (see figure below) and select the published or concept version link you want to use, in this case the published version, and select the "Copy shortcut" menu item.

Copy this hyperlink to the target drawing as file location, by pasting the copied hyperlink into the new drawing using the Xref manager via the "Attach" option. See next page.
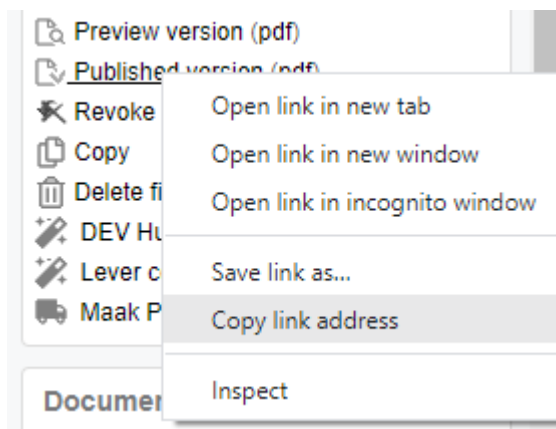
Go to the target drawing (Acad), open the Xref manager and copy the hyperlink (right mouse button, Paste) as file location (see next page).
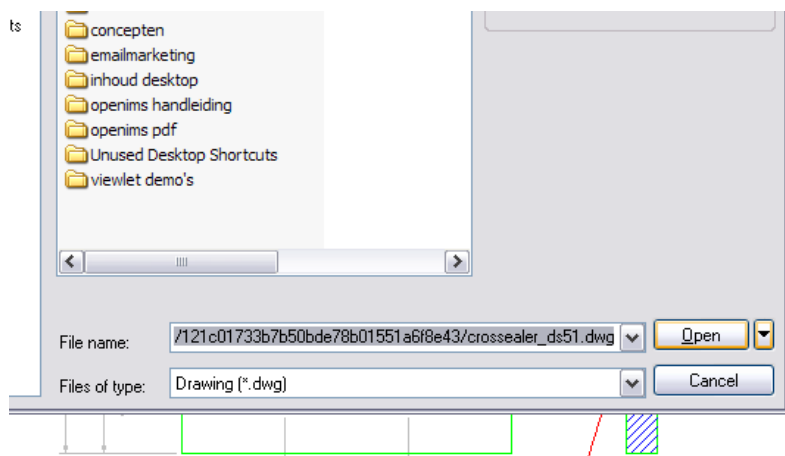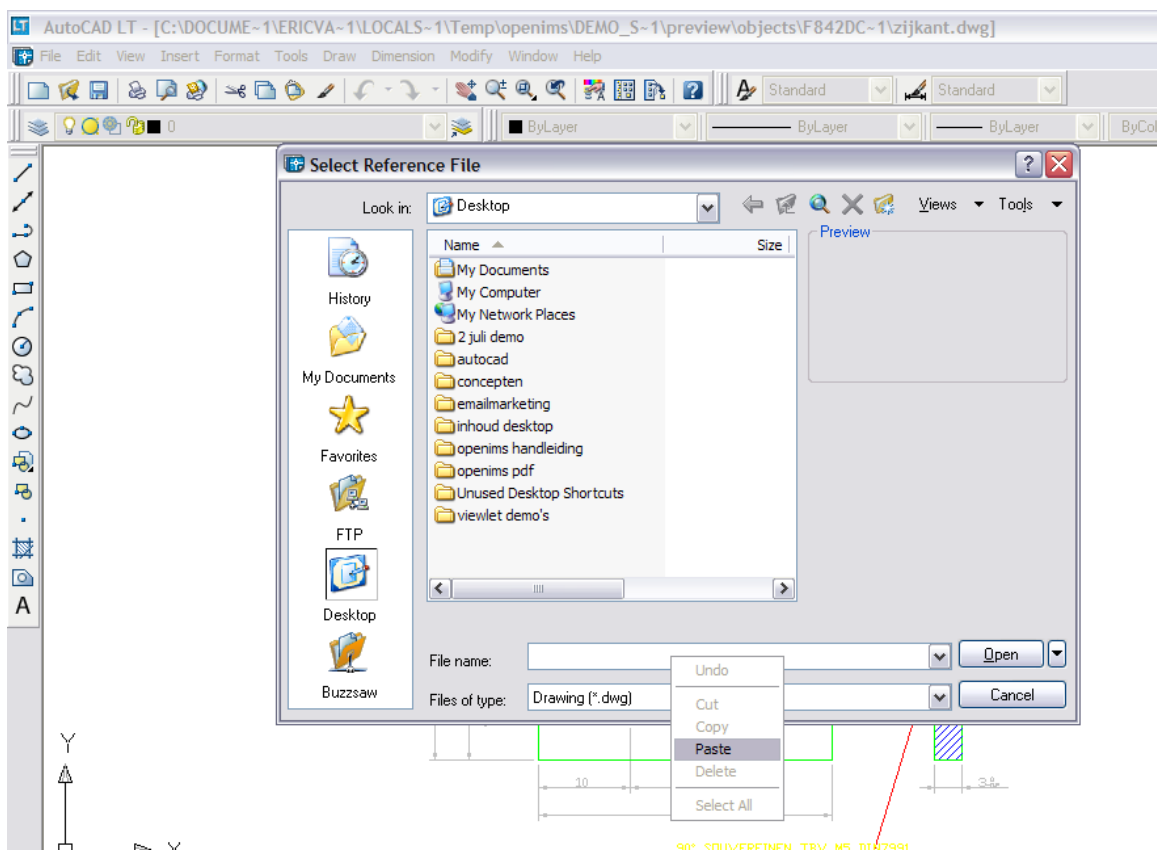
9.2 DMS Document hyperlinks in an e-mail

If you want to send one or more documents by e-mail using OpenIMS you may use the standard functionality of OpenIMS and the e-mail client (in this case Outlook). A user is able to, by means of cutting and pasting, insert hyperlinks of any document, including drawings from OpenIMS, in an e-mail.

When the user hovers with the mouse pointer over a hyperlink of a relevant document to be sent by e-mail, select it by pressing the **left** mouse button, choose "Copy shortcut" and open an e-mail to place the link in the message using the "paste" option. See figures below.
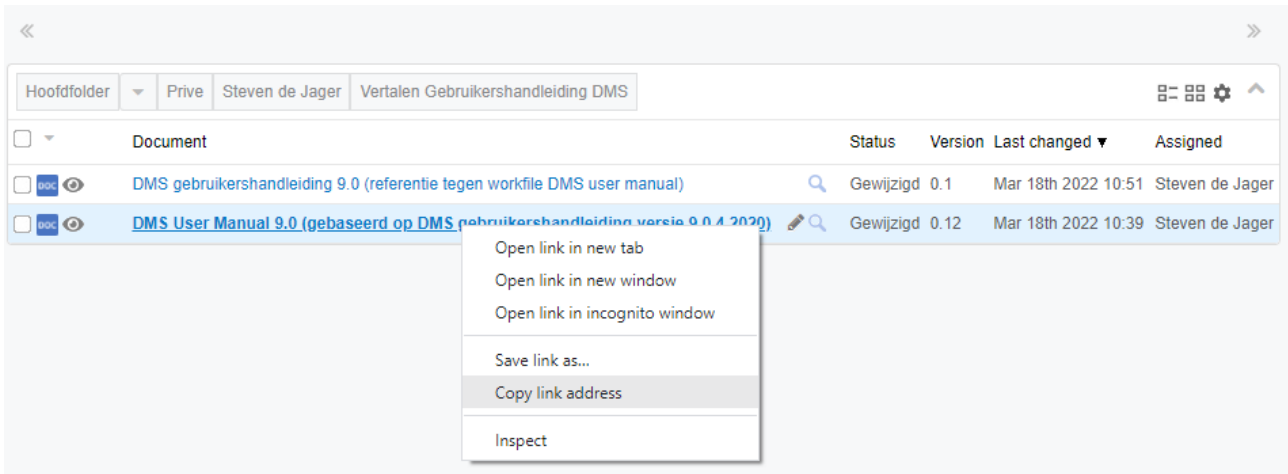
Use this method also for copying hyperlinks to documents, drawings, etc. into Word, Excel, PowerPoint and other applications.
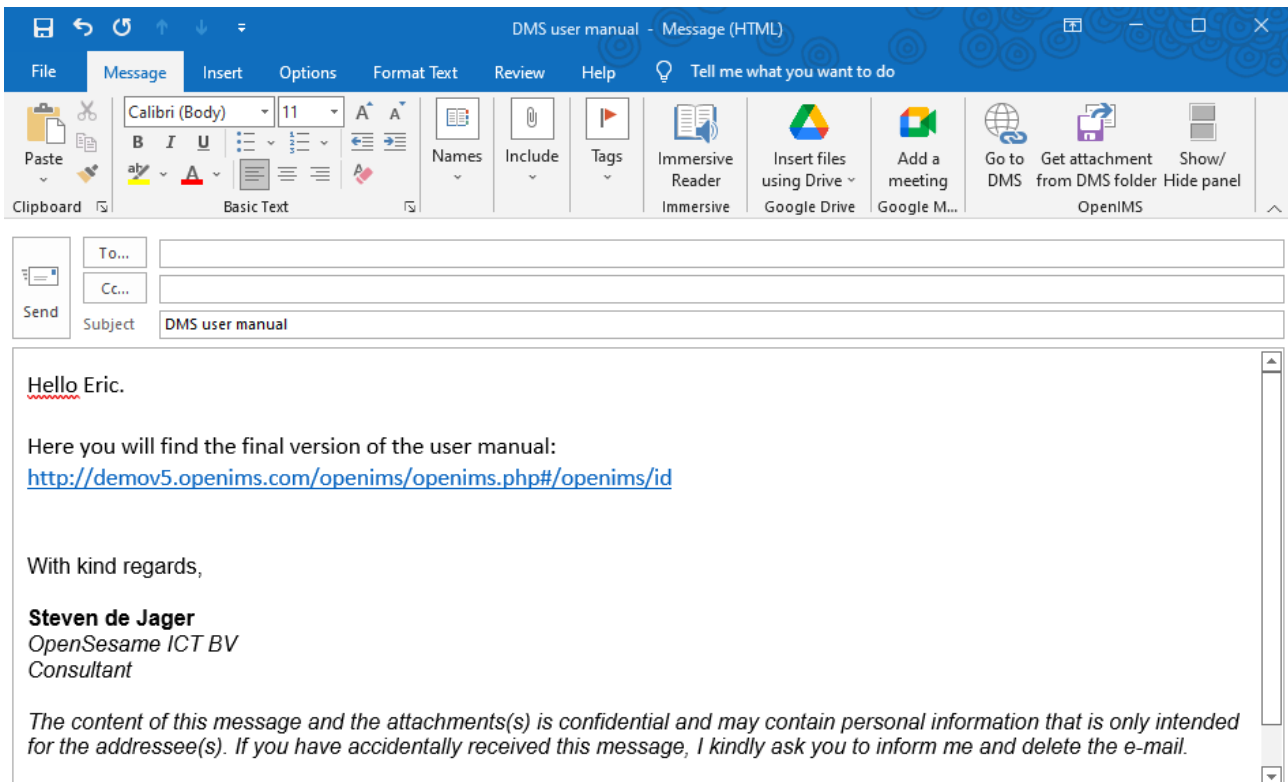
9.3 Working with bookmarks and hyperlinks in your browser

OpenIMS is fully web-based and every part (page / point of view) of OpenIMS has a unique url, which allows you to create shortcuts to any point of view within the system. You can include links to particular projects or folders that you often work on. You can even create a link to a document in a specific folder. You can add these links to your favorites or place them as a bookmark (favorites / shortcut) on your browser toolbar. Utilizing these solutions enables you to quickly and efficiently navigate to a specific place in the DMS.

Navigate to the location within OpenIMS DMS that you want to add to your favorites, open your favorites, name it and save the link to the desired location.

	Document		Status	Version	Last changed ▼	Assigned
☐ ▾						
☐ DOC 👁	DMS User Manual 9.0 (EN)	🔍	Gewijzigd	0.12	Mar 18th 2022 13:22	Steven de Jager
☐ DOC 👁	**DMS User Manual 9.0 (EN)**	🔍	Gewijzigd		Mar 18th 2022 13:22	Steven de Jager
☐ DOC 👁	DMS gebruikershandleiding 9.0 (referentie tegen workfile DMS user manual)	🔍	Gewijzigd	0.1	Mar 18th 2022 10:51	Steven de Jager

Hoofdfolder ▾ | Prive | Steven de Jager | Vertalen Gebruikershandleiding DMS

After a new favorite has been added, you can navigate to this specific point directly from your favorites.

9.4 Work utilizing containers

The container functionality aims to manage a collection of files as a whole within OpenIMS DMS. This means that this whole (read as 'container') is subjected to a workflow to which metadata can also be added. Take note that this function is not available for users who work with Apple computers.

Utilization
A container behaves, in principle, the same as a document within OpenIMS. The moment you open a container via 'Edit', a temporary transport directory is created on your local system in which all documents from the container are placed; for example: c:\imstrans. Afterwards the Windows Explorer is opened so you can now edit all documents and files from the container on your local PC.

Add new documents / files
You can add new documents to the container from the application, using drag & drop or the windows explorer.

Sub-folders
You may also add and create subfolders in a container.

Notifications
If you see the message "Press OK" when you are done with the container", you can send the container directly (upload) and close the explorer.

Per container mode
It is **NOT** possible to open multiple OpenIMS containers simultaneously. The moment you do, you will be clearing the local data of the previously opened container.

Note: while you are working on documents from the container, the Windows explorer may not be closed. If you do so, OpenIMS assumes that you have finished editing the documents. Any changes are uploaded to the DMS.

## 9.5 Sending documents as attachments in an e-mail

Your organization has access to OpenIMS DMS, your customers, partners and suppliers may not. Therefore, you will regularly want to send a physical document from OpenIMS as part of an e-mail.

To be able to send a document as an attachment (and you don't have the Outlook plug-in) you need to extract the document from OpenIMS DMS (download it to your local PC) and attach the document to an e-mail. If you do have the plug-in, you can use the mail functionality (see figure 2A below).

1. Select the documents you want to send. In the image above, the document "Demo" has been selected, among others, visible in the figure below in the action screen, where 3 documents in total are selected.

2. Download the selected documents to your local PC. You can choose the option "Download" from the menu (see figure below). After you have chosen the download option, the current version of the document will be downloaded to your local PC, in the directory "C:\IMSTRANS" after which Windows Explorer will start automatically.

   PLEASE NOTE: If you download one or more documents again from OpenIMS DMS, the documents that are already in the IMSTRANS directory will be deleted automatically.
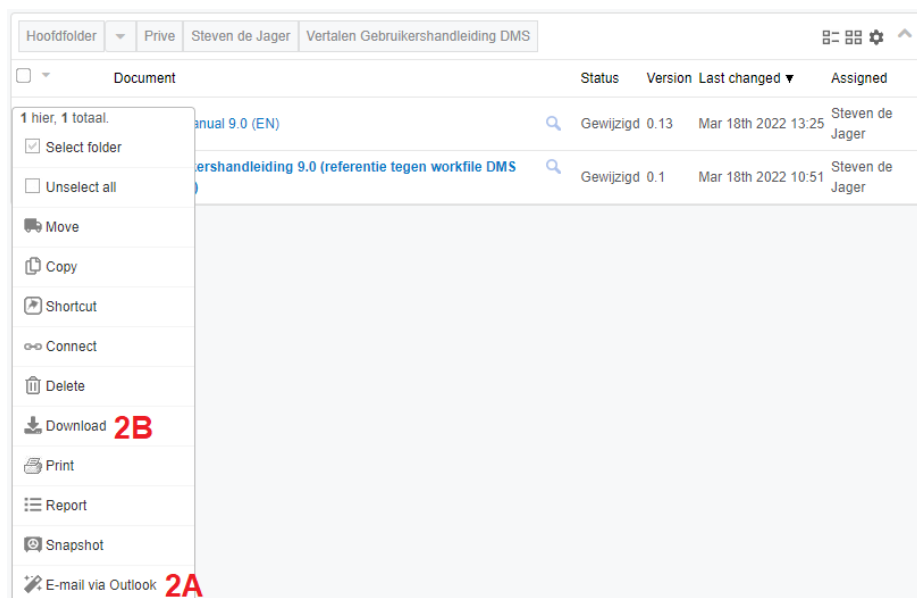
3. Create an e-mail and add the attachment, which results in the current version of the document on your local PC will be attached to your e-mail.

9.6 MS Word to HTML web generator

The quality of the conversion from Microsoft Word to HTML depends on the quality of the Microsoft Word document. In general, the more exotic the document is formatted, the more difficult it becomes to convert the document to HTML without changes. Navigation within the HTML document format, after it has been converted, is dependent of the layout of the document. For each chapter, you must indicate which style the title has (Heading 1, Heading 2, etc). The navigation structure is created on the basis of this format during conversion to HTML.

To convert a document to HTML as well as possible, an MS Word document must meet the following conditions:

- The document must be "neatly" put together with regard to headings (heading 1, heading 2, etc.). This also applies to attachments.
- Everything up to the first "heading 1" is deliberately skipped (normally this is the front page and the table of contents). (The table of contents is automatically created during conversion for navigating the generated website).
- The document structure must be correct, the first heading must be a heading 1, a heading 3 must be preceded by the corresponding heading 2, etc.
- The document must have a consistent set of styles (no changes of styles throughout the document).
- If text should be displayed below a picture and not next to it, there should be a carriage return between the picture and text in the document.
- A heading must consist of a single line (no carriage returns).
- Pictures (or other elements) must not float above the text. Positioning must be in the text itself or by means of invisible tables.
- Headers and footers are not included.
- Footnotes will not be handled properly if the document is divided into multiple sections/pages.
- Hyperlinks to other documents are processed properly, provided that what the link refers to is available.
- Internal hyperlinks (bookmarks) will not be handled properly if the document is divided into multiple sections/pages.

When a document meets the above list of conditions, it reduces the chance of errors in the conversion from Word to HTML. However, it is not a guarantee. Publishing always requires a visual check of the document after it has actually been published.

9.7   MS Word to PDF document convertor

OpenIMS DMS has an option to convert Microsoft Word documents (and other formats) to PDF documents.

If the functionality is available (i.e. is set up for your specific implementation), you can select "pdf" in the action menu behind the 'Preview' or 'Published' version link (see figure above). After clicking this option OpenIMS will convert the Microsoft Word document to a PDF version. Depending on the size of the document, this may take a few moments.

Please note: This functionality is only available if it is configured during system setup (on a Windows server).