

OpenIMS® Open Information Management Server

OpenIMS®

Fast, Easy to use and
On-demand
a Contentplatform of
the 21st Century



Document Management Server Overview

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1 INTRODUCTION

Open Information Management Server (OpenIMS®) is a server based solution designed to manage and maintain unstructured information such as documents, letters, faxes, notes, tenders, policy pieces, minutes, drawings, e-mail, internet content and intranet content for organisations.

OpenIMS® consists of five server based products:

- Portal Server (PS),
- Document Management Server (DMS),
- Content Management Server (DMS),
- Business Process Management Server (BPMS) and
- E-mail Management Server (EMS).

In combination these products can be used for:

- Enterprise Content Management (ECM),
- Contract Management (CM),
- Knowledge Management (KM),
- Electronic Record Management (ERMS),
- Product Data Management (PDM, EDMS).

OpenIMS® is based on Open Source technology, is easy to use, easy to learn, easy to implement, has powerful features, has modest hardware requirements and is fast.

This document is an overview of OpenIMS® Document Management Server.

A demonstration of this product is available at: www.openims.com/demo.

2 OVERVIEW

OpenIMS® - Document Management Server (DMS) – has a lot of functionality. It can be tailored according to the wishes of any organisation. The list of standard features is expanding continuously.

- **Document management.** You can manage all kinds of files such as all Microsoft Office products, Adobe Illustrator, Photoshop, PageMaker, Acrobat (pdf), Autodesk AutoCAD, Microstation CAD, Corel Draw, WordPerfect, Paradox, Labview, Lotus 123, Tiff, JPG, BMP, Macromedia Director, Flash and many more standard document types. OpenIMS® DMS is browser based and can therefore be used at any location. Version management, workflow management and security are an integral part of the product. OpenIMS® DMS is fully integrated with all open solutions for scanning (e.g. HP) and OCR (e.g. ScanSoft OmniPage).
- **Directory management.** You can manage directories, or other structures like projects, on the document server. You can manage structure, users, groups and access rights.
- **Users and groups.** With this module you can manage all usergroups and the underlying users. A user group has certain rights within the OpenIMS® system. Examples of supported rights are: read, edit, publish and delete.
- **Search.** This functionality is used to find documents within the document management system. The search engine of OpenIMS® has facilities similar to the popular search engine Google. It searches full-text and/or metadata of the documents. Found search terms are marked within the results. It is possible to define ranking of the results.
- **Security.** With this functionality all sessions (connections to OpenIMS®) are protected. For example all passwords are stored encrypted (MD5 crypto hash). OpenIMS® can cooperate with security technology like SSL and VPN to provide optimal security.
- **Template management.** This functionality provides management of document templates for easy and quick production of standard compliant documents such as contracts and proposals.
- **Audit trail (history).** OpenIMS® has excellent history management functionality. For each document it is possible to see who did what and when it was done.
- **Workflow.** Each document is linked to a workflow profile in which certain users are allowed to perform certain tasks on that document. Workflows can be managed using a webbased workflow designer. Management of workflows will usually be performed by the application and/or system management department.
- **Development (Flex).** This feature provides the possibility to extend the functionality of OpenIMS by IT professionals. Development such as interfacing with local CRM or ERP systems can be done.
- **Multilingual.** By default the user interface of OpenIMS® is multilingual. Dutch and English language packages are included in the standard product.

See also the OpenIMS® website (www.openims.com) and whitepapers for additional information.

3 FUNCTIONAL SPECIFICATIONS

3.1 Scanning

OpenIMS[®] does not limit your options in choosing a fitting scanning and/or OCR solution. It integrates with various standard scanning solutions. Scanning and converting documents by means of OCR and processing them is possible with OmniPage; a solution which is supported widely by scan equipment suppliers.

Scan to PDF

OpenSesame ICT recommends usage of pdf-on-text format for scanned documents. Each document will be converted to pdf format and will still be identical to the original document, including signatures and drawings, can still be indexed by the OpenIMS[®] search engine, making full-text retrieval available for each document.

Scanning users

Scanning is possible for users with rights to add documents to the OpenIMS[®] system and from any location where this access is granted.

3.2 Storage & Archive

3.2.1 Indexing

Each document within the OpenIMS[®] system can be provided with metadata. Metadata describes the information of the document such as name, location, version, owner, author, reference numbers, trade, country, terminal etcetera.

The metadata can be managed with the metadata editor which is included in OpenIMS[®].

The metadata also can be provided by other systems such as ERP or CRM applications. In the properties dialog (see picture) the metadata can be viewed and edited by authorised users

All documents are full-text indexed in real-time by the search engine. The metadata will be indexed in the same process.

This way documents can quickly be found by means of the metadata (for example all documents related to a certain customer) and/or by text inside the document.

The screenshot shows the 'Properties' dialog box for a document. The dialog is titled 'Properties' and contains the following fields and options:

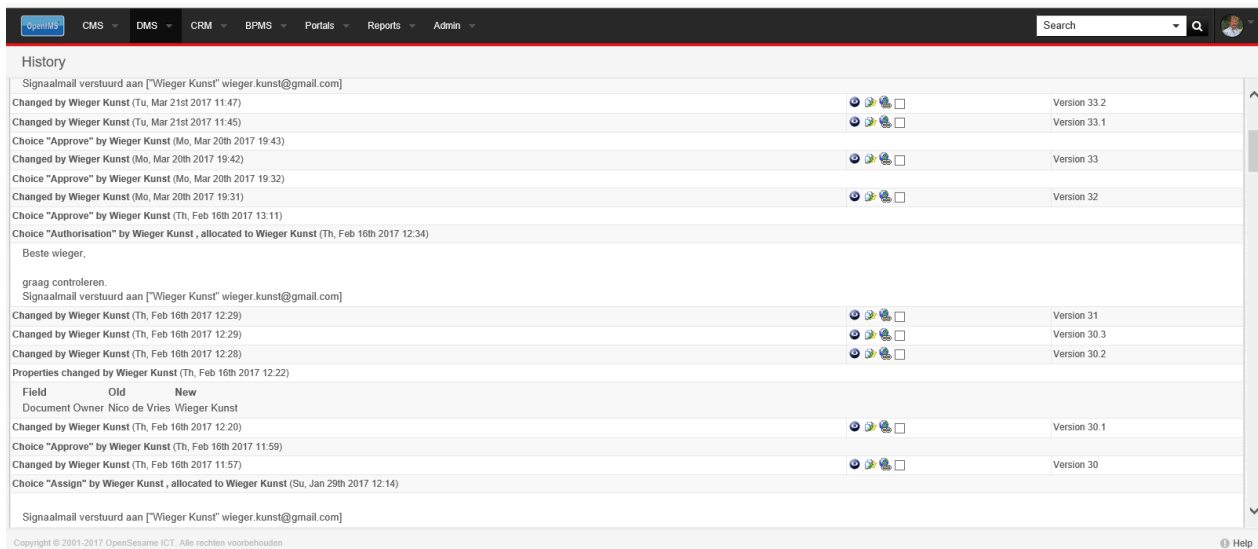
- Name: Barcode Brief NL - Brief - H.W.W.
- Description: Barcode Brief NL br16.00671
- Workflow: Mail out (with a 'Select' button)
- Author: Wieger Kunst (with a 'Select' button)
- Document Type: Letter (with a 'Select' button)
- Documentnumber: 16.00671
- Company location: Nieuwegein (dropdown menu)
- Organization: Mobility Managers
- Sender: Mr. D. Bouwmeester (with a 'Search' button)
- Address: Postbus 3000
- Postal: 3980 AA
- City: Utrecht
- Project.ordernumber: 4564575
- Date: Nov 23 2016 (with a calendar icon)
- Subject: offerte aanvraag
- Archiefcode: (with a 'Select' button)
- Convert to PDF:

At the bottom of the dialog are 'OK' and 'Cancel' buttons. The background shows a document management interface with a list of documents and a sidebar with various actions like 'Edit', 'View', 'E-Mail', 'Upload new version', 'Properties', 'History', 'View / Edit annotations', 'Signal', 'Preview version', 'Template', 'Delete file', 'Add comments', 'Create a knowledge item', 'Grafische Werk', 'Document workflow', 'Send', 'Approve', 'Review', 'Check', 'Reassign', and 'Wizard'.



3.2.2 Document version control

OpenIMS® provides excellent history management features. It is possible to see who did what, when with a certain document. In the picture below you can see an overview of all changes made to a document



It is also possible to view previous versions of a document and to reverse changes.

All documents can have version numbers which are configurable to match company standards.

All versions of documents are stored indefinitely unless specified otherwise.

3.2.3 Filing period

Both rule based and manual configuration of a filing period is possible. By default the filing period is unlimited.

3.3 Search & Query

3.3.1 Search and retrieval keys

The full-text and metadata search engine of OpenIMS[®] has facilities similar to the popular search engine Google. It searches full-text and/or in the metadata of the documents. When a document is placed in the DMS it is instantly indexed and searchable (real-time indexing). Found search terms (simple and advanced search) are marked within the results. It is also possible to define ranking factors for the results. In the picture below the advanced search dialog is presented with on the right side possible filters.

The screenshot displays the OpenIMS DMS Search interface. The top navigation bar includes links for CMS, DMS, CRM, BPMS, Portals, Reports, and Admin. The main search area is titled 'DMS Search' and contains several filter options: 'with the phrase', 'without the terms', 'Document Type' (with a 'Select' button), 'search versions' (set to 'preview and published'), 'search index' (set to 'standard'), 'scope' (with radio buttons for 'Everything', 'Casetype', and 'Case'), 'with workflow' (set to 'any'), 'with file format' (set to 'any format'), 'with date between' (with date pickers), and 'sort by' (set to 'relevance and date'). A blue 'Search' button is located below the filters. The search results section shows 'Result 1 - 10 of more than 500 results' and includes a 'Next >>' button and links for 'Report', 'Select', and 'Deselect'. Three search results are visible, each with a document icon, title, version, and date. The right sidebar, titled 'Active filters', shows 'Geen active filters' and a list of document types with their respective counts, such as 'Datasheet (3)', 'Letter (36)', 'Contract (42)', 'Form (22)', 'Memo (16)', 'Import (18)', 'BR (18)', 'M (7)', 'SOP standard operation procedure (1)', 'Instructions (43)', 'Presentation (1)', 'E-mail (93)', 'Policy (4)', 'Documentation (49)', 'geen (32)', 'Photo (3)', 'Project Plan (19)', 'Report (9)', 'Licence (1)', 'Press release (1)', 'DAT (2)', 'Order (1)', 'Transfer (7)', 'Inkoopfactuur (3)', 'Procedure (3)', and 'Nótlén (1)'. A 'Help' icon is located at the bottom right of the interface.

3.4 Share & View

3.4.1 Downloadable through export function

OpenIMS[®] DMS is a webbased document management system in which every document has its own secured (256 bits encrypted) hyperlink or URL. This hyperlink gives access to a certain document. The document can be downloaded and stored locally. Documents can be made accessible at every location that has internet connectivity.

3.4.2 Access control list

Authorisation is standard. Access is secured with a login id and password, which can be connected to a LDAP compliant directory service. Unified logon is also available. All sessions (connections to OpenIMS[®]) are protected. For example all passwords are stored encrypted (MD5 crypto hash). OpenIMS[®] can cooperate with security technology such as SSL and VPN.

4 TECHNICAL SPECIFICATIONS

4.1 Operating system and webserver

Operating systems

OpenIMS[®] runs under Apache Webserver (version 1.3.28 or higher) which in its turn runs under Windows (NT, 2000, XP, 2003), Linux (Redhat, Suse), Apple, IBM AIX, HP/UX and Sun Solaris. Linux is the recommended platform for OpenIMS[®].

Database platforms

Because OpenIMS[®] uses an integrated XML data store to store all information a database server is not required. Use of a database is optional. All common database servers are supported by OpenIMS[®].

OpenIMS[®] works with sophisticated XML objects. These can be stored in Oracle, Microsoft SQL-Server, MySQL, Sybase and ODBC compliant databases.

Integration

OpenIMS[®] integrates with SOAP, WebServices, (D)COM(+), Java, JSP, J2EE, XML, XSLT, ASP, PHP and Perl. For the Apache platform many standard components are available.

Customer platforms

OpenIMS[®] is 100% webbased and can be used with all major internet browsers.

4.2 Hardware requirements

OpenIMS[®] DMS is based upon Apache and requires the following minimum Linux server configuration: 1 GB RAM, 2 GHz processor and sufficient SCSI storage (preferably RAID). Example configuration:

Dell PowerEdge 600SC SCSI, Intel[®] Pentium[®] 4, 2.4GHz
1 GB Memory
2 x 73GB 10,000rpm Ultra 3 160 SCSI hard drive
RAID 1 using a PERC 4/SC RAID Controller (32MB)

OpenSesame ICT assumes that backup equipment is already available.

4.3 Hosting

OpenIMS[®] is 100% webbased so it can be hosted on any server and be made accessible from any PC with a webbrowser (LAN, WAN or regular Internet). Access is secured with a login id and password, which can be connected to a LDAP compliant directory service. Also unified logon is available. It is also possible to increase security by using SSL and/or VPN protocols.

4.4 Support service

Standard support

Standard support consists of updates and technical support for the standard product. During the duration of the support contract the license holder is entitled to use patches, updates, new versions and e-mail helpdesk support. Patches, updates and new versions are distributed by means of an Internet connection to our master server.

Service Level agreement (SLA)

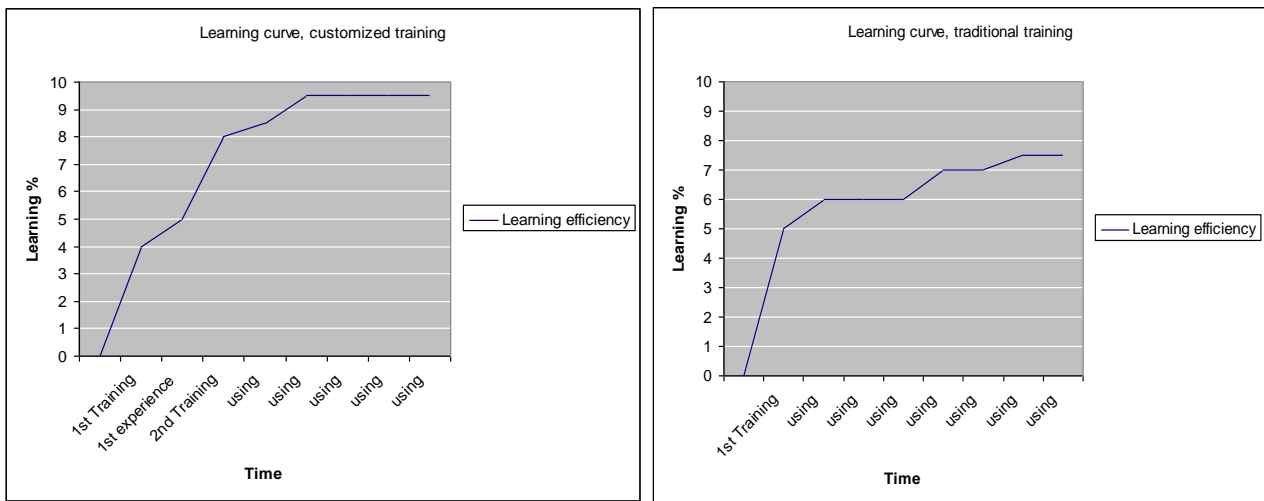
The standard support can be extended. A Service Level Agreement (SLA) which describes addition support may be made. The SLA defines which helpdesk support has been agreed upon (for example 8x5 or 24x7 support) and, if an ASP model is deployed, which level of availability is required.

5 TRAINING

Users can receive training to work efficiently with the OpenIMS® DMS application.

In order to achieve the best possible result the trainees will receive customised training. This training will simulate the real situation users can expect during their daily work routine. The goal of the training is to teach all trainees to learn to work with the application conforming their own working environment and procedures. This will result into a very efficient training.

The first training will be 4 hours in week 1, this training will be continued for another 4 hours in week 2 (or later). The time in between can be used by trainees for self study and further familiarising with the application. The second training will be more productive and interactive, resulting in a higher learning curve (see pictures).



Pre-assessment

Based on our experience combined with unique characteristics of your organisation the training can be customised. There is also the possibility for differentiating based on trainees background, current function and/or experience.

Study plan

A detailed study plan will be put together in the course of the project. Classes are minimal 6 – maximal 12 trainees. To train 250 users an estimate of 50 training sessions of 4 hours will be needed, depending on availability of the trainees.

Location

Location is at customer local offices. If a suitable trainings location is unavailable another location can be chosen.

6 CONTACT

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