

OpenIMS 4.2



**Technical and Functional Management
Manual**

OpenSesame ICT BV
January 2006



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1 Introduction

OpenIMS is a platform for managing unstructured information such as documents, content (websites) and e-mail.

This document will specify which components of the system are available to you, the administrator.

There is also a special online manual available that you can find at <http://doc.openims.com/>.

1.1 Client specifications

An OpenIMS user requires at least:

Windows PC's

- Microsoft Internet Explorer 5.0 or higher;
- An Internet connection;
- The OpenIMS Transfer Agent. (see www.openims.com left at the bottom);
- Microsoft Word 2000 or higher (When OpenIMS CMS is used) ;

Macintosh PC's

- Mac. OS X 10.3 (Panther) ;
- Browser Safari 1.2.4 ;
- Java version 1.4.2;
- OpenIMS Transfer Agent;
- A proper connection with the OpenIMS server through the network;
- Internet access.

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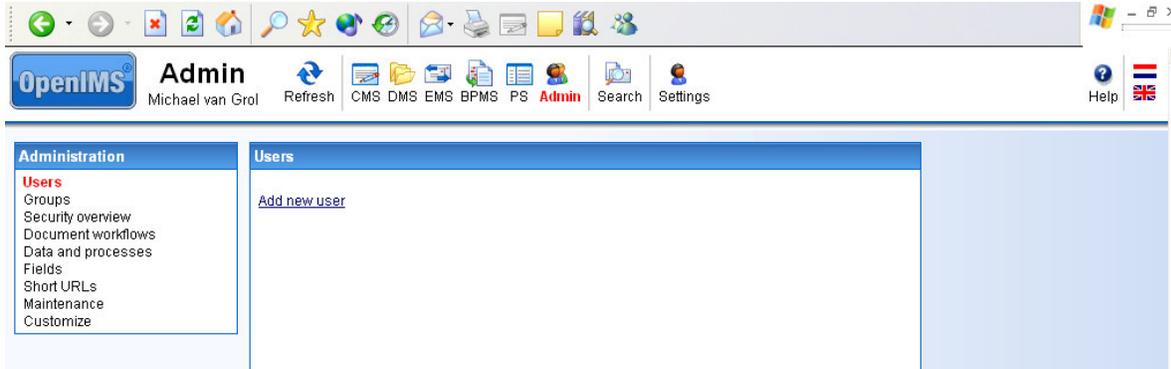
2 Introduction OpenIMS

OpenIMS is 100% web based. This means that you are able to perform all necessary changes and actions through your web browser. Depending on your access rights within Open IMS, you can access certain parts of the system. Therefore you first need to log into OpenIMS.

2.1 Login

You start your web browser and enter the url (<http://intranet.yourcompanyname.com>) of the domain where your documents are stored. To access the administration environment, you add the word "**Admin**" at the end of the url (<http://intranet.yourcompanyname.com/admin>). At that moment the OpenIMS login dialog appears. Now you can enter your user name and password and the OpenIMS portal will start.

3 Admin screen



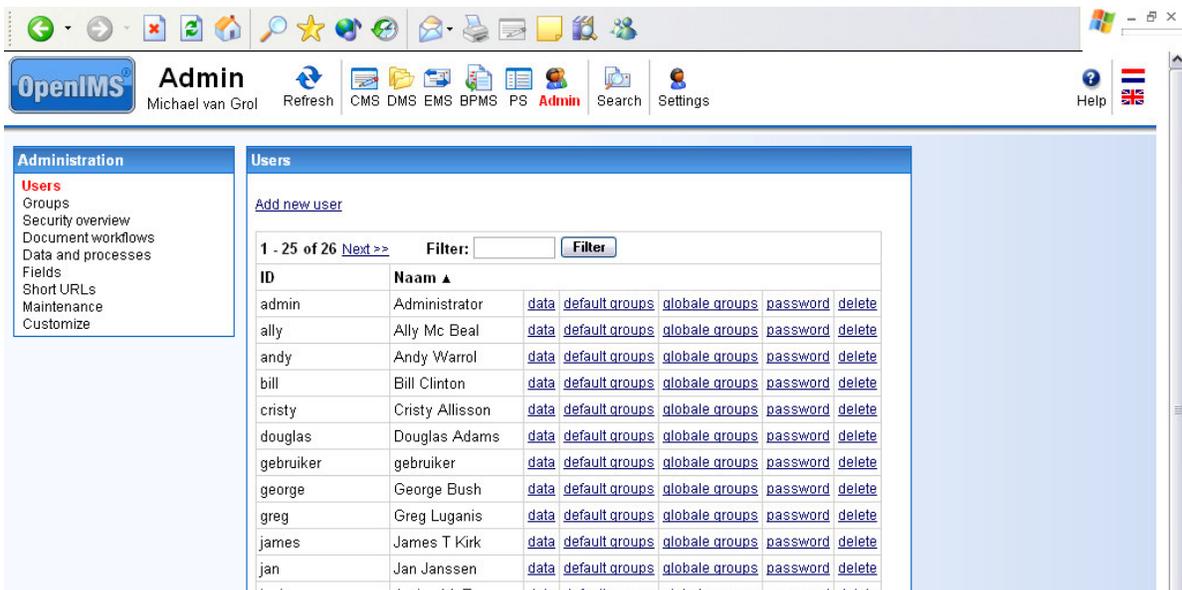
The Admin overview includes the following Options:

Option	Description
Users	Managing user names and group classification.
Groups	Managing groups and access rights
Overview access	This report shows an overview of all the access rights that are defined between the users, groups and workflow profiles.
Workflow	The workflow profiles of both DMS and CMS can be defined here.
Processes	The BPMS processes can be defined here.
Fields	This is the central point where all fields are defined.
Maintenance	The maintenance screen gives administrators the possibility to install the latest version of OpenIMS, alter configurations, etc.
Custom made	Every organization has different requirements. To be able fulfil these requirements; OpenIMS has a tailor-made environment available where special components can be developed. For example: navigation objects for websites, web applications or links to Back office systems.

4 Security

4.1 Users

When the administrator selects the option “**Users**”, he will receive an overview of the current system users. At first the list is limited to the first 10 users. By using the filter function, a specific group of users can be selected. See figure below.



The screenshot shows the OpenIMS Admin interface. The top navigation bar includes the OpenIMS logo, the user name 'Admin Michael van Grol', and various system icons. The left sidebar contains a menu with options like 'Users', 'Groups', 'Security overview', etc. The main content area is titled 'Users' and features a table of users. The table has columns for 'ID', 'Naam', and several action links. A filter field and a 'Filter' button are located above the table.

ID	Naam ▲	data	default groups	globale groups	password	delete
admin	Administrator	data	default groups	globale groups	password	delete
ally	Ally Mc Beal	data	default groups	globale groups	password	delete
andy	Andy Warrol	data	default groups	globale groups	password	delete
bill	Bill Clinton	data	default groups	globale groups	password	delete
cristy	Cristy Allisson	data	default groups	globale groups	password	delete
douglas	Douglas Adams	data	default groups	globale groups	password	delete
gebruiker	gebruiker	data	default groups	globale groups	password	delete
george	George Bush	data	default groups	globale groups	password	delete
greg	Greg Luganis	data	default groups	globale groups	password	delete
james	James T Kirk	data	default groups	globale groups	password	delete
jan	Jan Janssen	data	default groups	globale groups	password	delete

4.1.1 Searching

When you enter a part of the user name in the Filter field and press the “Filter” button, all results belonging to the selection will be shown. In case the wanted name is in the overview, you are able to edit it directly.

4.1.2 Creating

You can create a new user by selecting the “New” option. You need to enter an ID, a name, an e-mail address and a password. The password needs to consist of at least 6 characters, letters and numbers combined.

4.1.3 LDAP

When the LDAP validation module has been configured and turned on, user accounts can be validated with every service that supports validation via the LDAP protocol, like active directory from Microsoft.

Note: The ID of the user in OpenIMS has to be identical to the username of the user in the central user administration database.

Per account can be decided to activate the validation or not. This way for example the OpenIMS functional administrator accounts do not have to be created on the central database.

4.1.4 Removing

You can remove a user by selecting the “Remove” option. When you have selected this option, the specific user is no longer able to login and is also removed from all user groups.

4.1.5 Editing

This option gives you the possibility of editing user-names and e-mail addresses (by clicking on the data section). Of course (other) non-standard fields can be added to the user profile; for example: department, address, phone number, etc. All this information can be edited.

4.1.6 OpenIMS Groups

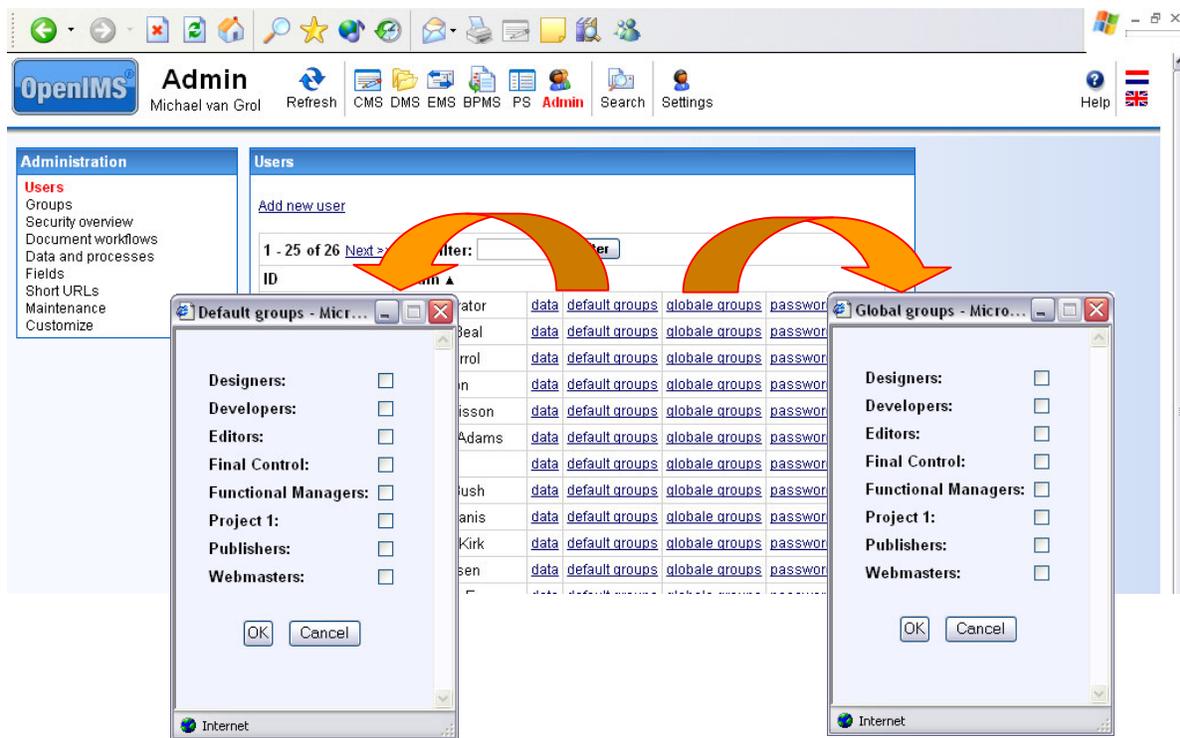
On a central level all groups (characters) can be defined via the “Groups” option (see paragraph 4.2). Afterwards these groups are available to different security models (standard, local, global).

These various security models make it possible to, for example, assign people to different groups with different rights per project.

Note: Only standard groups are relevant to OpenIMS-CMS. Local and global groups are only relevant to OpenIMS-DMS

Standard groups

Via the hyperlink “standard groups” an overview of all available user groups is shown. You can assign a user to a group by selecting the group.



Groups have to be defined before you can add a user to it. (see paragraph 4.2)

Local groups

Whenever a folder (DMS) uses local security (see paragraph 6.1), it is specified on folder level to which groups a user is assigned.

This replaces the standard groups the user is assigned to. This way certain tasks, for example; designer, can be registered on folder level.

Global groups

Global groups are transcendent. When a user is assigned to a special group (for example: auditors of board members), it is valid through all security models, also in folders with local security.

4.1.7 Password

All passwords are being saved encrypted. (MD5 Crypto Hash). This means that a password is not traceable. If a user forgets his password, it cannot be assigned to him again. A new password must be handed out.

With the option "Password" you can hand out a password or change one. After a password has been entered, the system will check if it contains a combination of at least 6 letters and/or numbers.

When he/she is logged in, the user has the opportunity to change the password into a personal letter/number combination.



The screenshot shows a web browser window with the address bar containing "http://michaellaptop.osict.com/nkit/form.php...". The main content area displays a form with the following elements:

- A label "Password:" followed by a text input field.
- A label "Check:" followed by a text input field.
- A label "Generate:" followed by an unchecked checkbox and the text "(generate password and send e-mail)".
- Two buttons: "OK" and "Cancel".

The browser's taskbar at the bottom shows the name "Gereed" and the "Internet" icon.

4.2 Groups

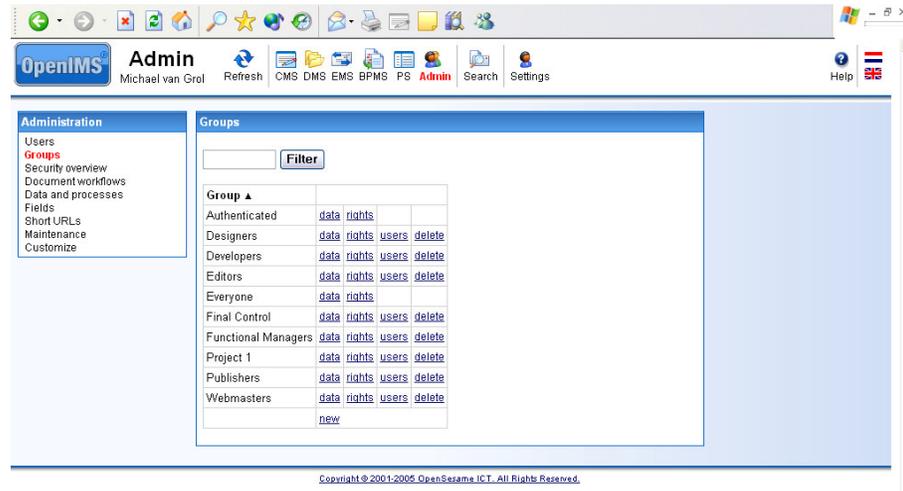
Every user must be assigned to a user group to be able to work with OpenIMS since rights are assigned to user groups.

There are two special user groups:

- Everybody
- Authenticated

All users that are added to the system are automatically assigned to these user groups.

These (system) user groups cannot be removed.



4.2.1 Creating

With the “New” option you can create new user groups.

4.2.2 Removing

With the option “Delete” you can remove a user group.

4.2.3 Editing

With the option “Edit” you can edit user group properties.

4.2.4 Overview users

With this option you will see an overview of all the users per group.

4.2.5 Assigning rights

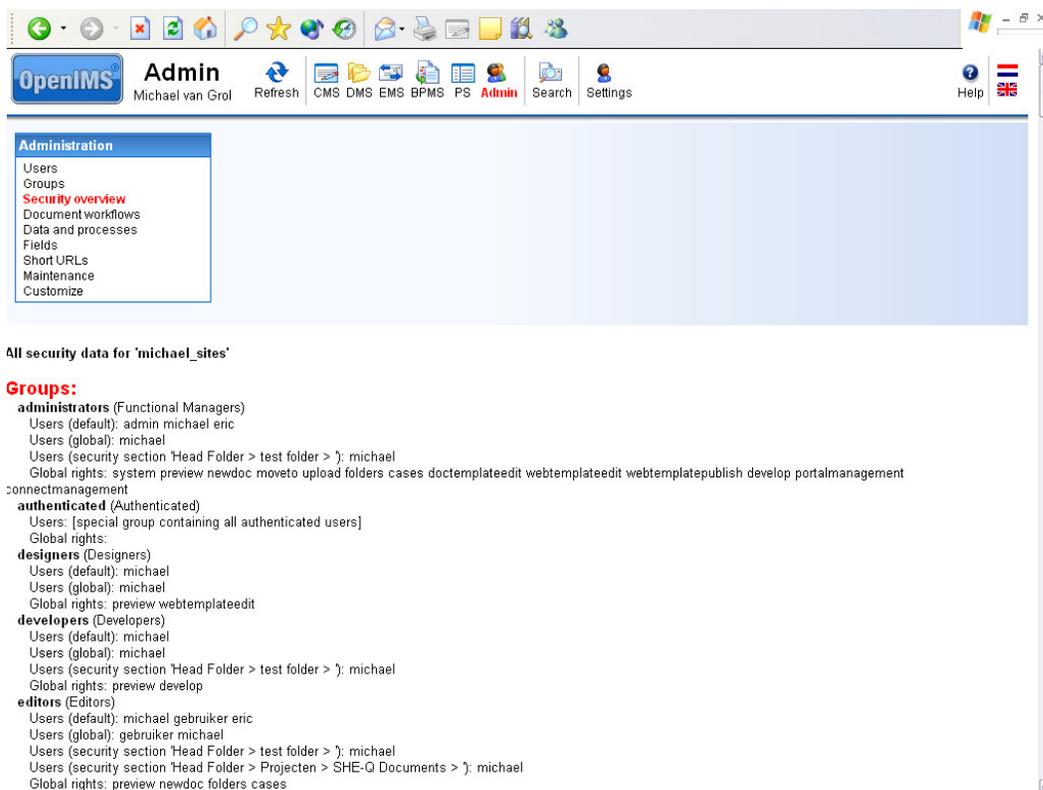
With the option “Rights” you can assign the access rights to the user groups. The following rights are available within OpenIMS

Right	Product	Description
Preview	CMS/DMS	You can view non-published versions of a document.
Newdoc	CMS/DMS	You can create new documents.
Folders	DMS	You can manage the folder structure of DMS (edit, create and remove)
Doctemplateedit	DMS	You can create and/or remove document templates.
Webtemplateedit	CMS	You can create and/or remove web templates.
Webtemplatepublish	CMS	You can publish templates.
Develop	CMS/DMS	You can add an application code (PHP).
Portalmanagement	Portal	You can manage portals.
System	All	All rights.

Note: as soon as a new group is created, it standard has access rights to all CMS templates.

4.3 Security Overview

The option “Security Overview” gives a complete overview of all users, groups, workflows and the mutual relations.



The screenshot shows the OpenIMS Admin interface. The top navigation bar includes 'OpenIMS Admin' and 'Michael van Grol'. Below the navigation bar, there is a sidebar menu with 'Administration' selected, showing options like 'Users', 'Groups', 'Security overview', 'Document workflows', 'Data and processes', 'Fields', 'Short URLs', 'Maintenance', and 'Customize'. The main content area displays 'All security data for 'michael_sites'' and lists several groups with their respective users and global rights:

- administrators (Functional Managers)**
 - Users (default): admin michael eric
 - Users (global): michael
 - Users (security section 'Head Folder > test folder > '): michael
 - Global rights: system preview newdoc moveto upload folders cases doctemplateedit webtemplateedit webtemplatepublish develop portalmanagement
- authenticated (Authenticated)**
 - Users: [special group containing all authenticated users]
 - Global rights:
- designers (Designers)**
 - Users (default): michael
 - Users (global): michael
 - Global rights: preview webtemplateedit
- developers (Developers)**
 - Users (default): michael
 - Users (global): michael
 - Users (security section 'Head Folder > test folder > '): michael
 - Global rights: preview develop
- editors (Editors)**
 - Users (default): michael gebruiker eric
 - Users (global): gebruiker michael
 - Users (security section 'Head Folder > test folder > '): michael
 - Users (security section 'Head Folder > Projecten > SHE-Q Documents > '): michael
 - Global rights: preview newdoc folders cases

4.4 Workflow

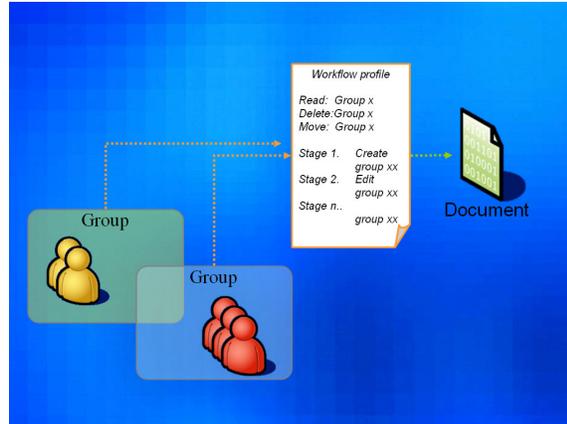
OpenIMS uses so called workflow profiles. Every document or webpage is linked to a workflow profile. A workflow profile not only contains the various stages in which a document can be located, but also the complete authorisation model.

This paragraph explains how basic access rights are defined to a document and how you can compile a workflow profile.

During the creation of a document, a workflow profile will be assigned.

Application: OpenIMS-CMS en DMS.

OpenIMS' search machine holds the workflow profile authorisation model into account



4.4.1 Overview workflow profile

From the **Admin** environment you can choose the option “Document Workflow”.

Workflow ▲	CMS	DMS	Summary
General	YBS	YBS	New - changed - for approval - disapproved - publiced
Post	YBS	YBS	Recieved - to assign - reject - publiced
Complaint	YBS	YBS	New - under investigation - replied - closed
Wijzigen en publiceren (prive)	YBS	YBS	Nieuw - Gewijzigd - Gepubliceerd edit copy delete
Wijzigen en publiceren (publiek)	YBS	YBS	Nieuw - Gewijzigd - Gepubliceerd

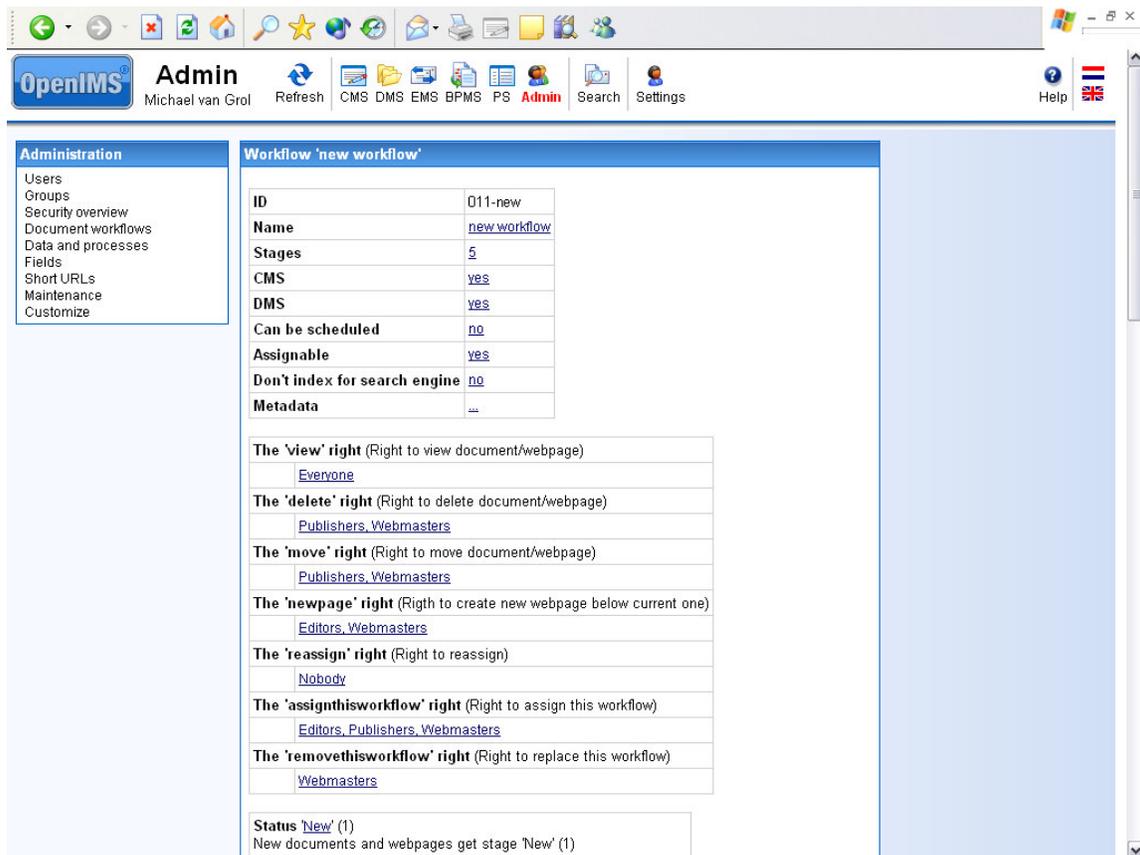
Through this screen you are able to see which profiles are available; edit, copy (creating a new profile based on an existing profile) and remove them.

OpenIMS has two standard profiles available which cannot be removed. Furthermore you can select which workflow profile has to be available within which product (CMS/DMS).

4.4.2 Properties of a workflow profile

A workflow profile consists of three parts:

- General properties,
- Rights,
- Stages.



OpenIMS Admin
Michael van Grol

Refresh CMS DMS EMS BPMS PS Admin Search Settings Help

Administration

- Users
- Groups
- Security overview
- Document workflows
- Data and processes
- Fields
- Short URLs
- Maintenance
- Customize

Workflow 'new workflow'

ID	011-new
Name	new workflow
Stages	5
CMS	yes
DMS	yes
Can be scheduled	no
Assignable	yes
Don't index for search engine	no
Metadata	...

The 'view' right (Right to view document/webpage)
[Everyone](#)

The 'delete' right (Right to delete document/webpage)
[Publishers, Webmasters](#)

The 'move' right (Right to move document/webpage)
[Publishers, Webmasters](#)

The 'newpage' right (Right to create new webpage below current one)
[Editors, Webmasters](#)

The 'reassign' right (Right to reassign)
[Nobody](#)

The 'assignthisworkflow' right (Right to assign this workflow)
[Editors, Publishers, Webmasters](#)

The 'removethisworkflow' right (Right to replace this workflow)
[Webmasters](#)

Status [New](#) (1)
New documents and webpages get stage 'New' (1)

4.4.2.1 General properties

An OpenIMS workflow profile has the following general properties:

Name	The workflow profile name as is shown within OpenIMS.
Number of stages	Number of stages in which a document or webpage can be found. This is adjustable afterwards.
CMS, DMS	If "Yes", the workflow profile is available within this product.
Planning	If "Yes", scheduling of the profile pages within OpenIMS-CMS is activated.
Assignable	Gives the possibility to assign documents/pages to a specific person.
Metadata	Here the metadata fields are defined that are visible in the properties screen of the document/page. See chapter 9: Fields management.

4.4.2.2 Rights

The image in paragraph 4.4.2 shows the various rights within OpenIMS:

View	You can view and read a document / webpage
Delete	You can remove a document / webpage.
Move	You can move a document / webpage.
New page	You can create a new document / web page.
Reassign	You can reassign a document / webpage to another user. For example in case the original user is unable to manage the document/ webpage.
Assignthisworkflow	You can use the specific workflow profile
Removethisworkflow	You can switch one workflow profile for another.

4.4.2.3 Document stages

Assignthisworkflow	You can assign the specific workflow profile to a document/ web page.
Removethisworkflow	You can remove the specific workflow profile when it is assigned to a document / web page.
Status	In the stages, mentioned in paragraph 4.4.2.1., the stage of a document is defined. For example: preview, edit, etc.
Edit	A document can be edited in every stage. In case no groups are assigned to the option "edit", a document cannot be edited in this stage. Per status you can specify which user groups may edit the document. You can also specify to which stage a document proceeds when it's being edited.
Choice	In a specific stage different choices can be defined. This means that different user groups can transfer a document to a different status. A user can only see the choices to which he is authorized.
Specialities: Automatic signalling	Here you can specify how long a document may stay in a specific stage. You are able to guard the progress.
Specialities: event	Possibility to start application code when changing a stage.
Specialities: Distribution list	Sending a notification to a certain group of people in a distribution list when a status is changed.

Status 'Changed' (2)	
Edit	
	After edit the stage becomes 'Changed' (2)
	Edit is allowed for: Editors, Webmasters
Choice 'Publish' delete choice	
	Choice 'Publish' changes the status into: 'Published' (5)
	This choice can be made by: Publishers, Webmasters
Add choice	
Other	
	After 40 days the status is changed into 'Disapproved' (4) and a progress monitoring e-mail is sent with title 'Document to long in Stage' with a CC to "
	In this stage there is no event
	In this stage there is no mail signal

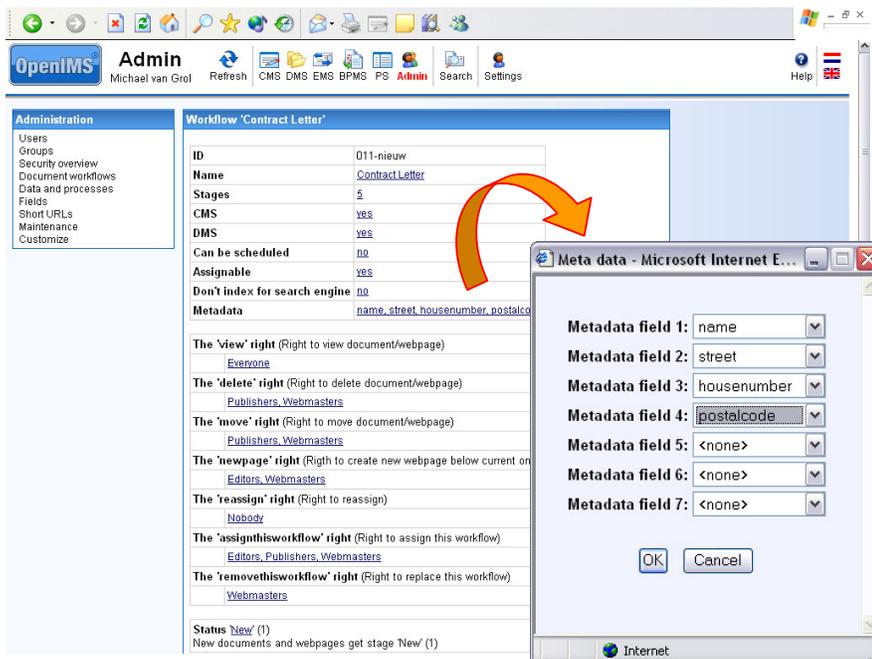
4.4.3 Editing workflow profiles

This paragraph explains how a workflow profile can be edited.

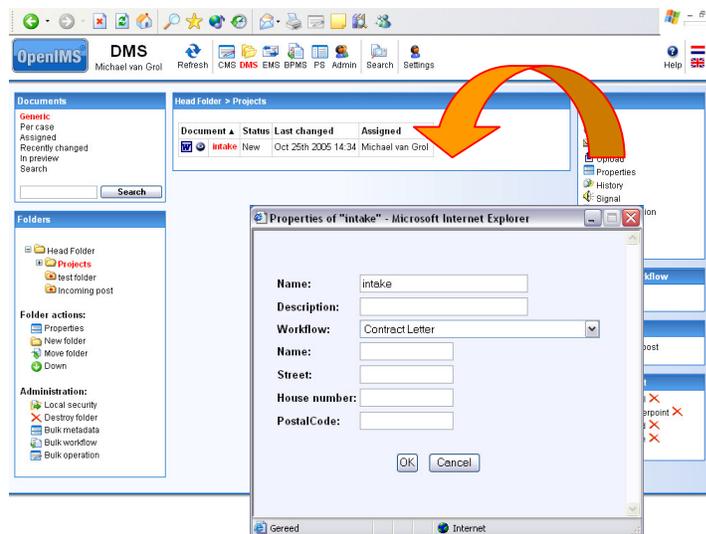
4.4.2.4 Adding Metadata (Document Metadata)

On a central level you can assign metadata fields to a document. These metadata fields will subsequently be added to the document properties. To edit the metadata fields you select the specific hyperlink and add or remove metadata fields, see image.

The available fields can be defined with the use of the field editor, see chapter 9.



The next image shows the properties screen of a document in OpenIMS-DMS with metadata fields that were just assigned to the workflow profile.



4.4.3.1 Editing rights

You can assign different user groups to the rights per stage. You will receive an overview of all available groups. The groups that already have been assigned are already marked.

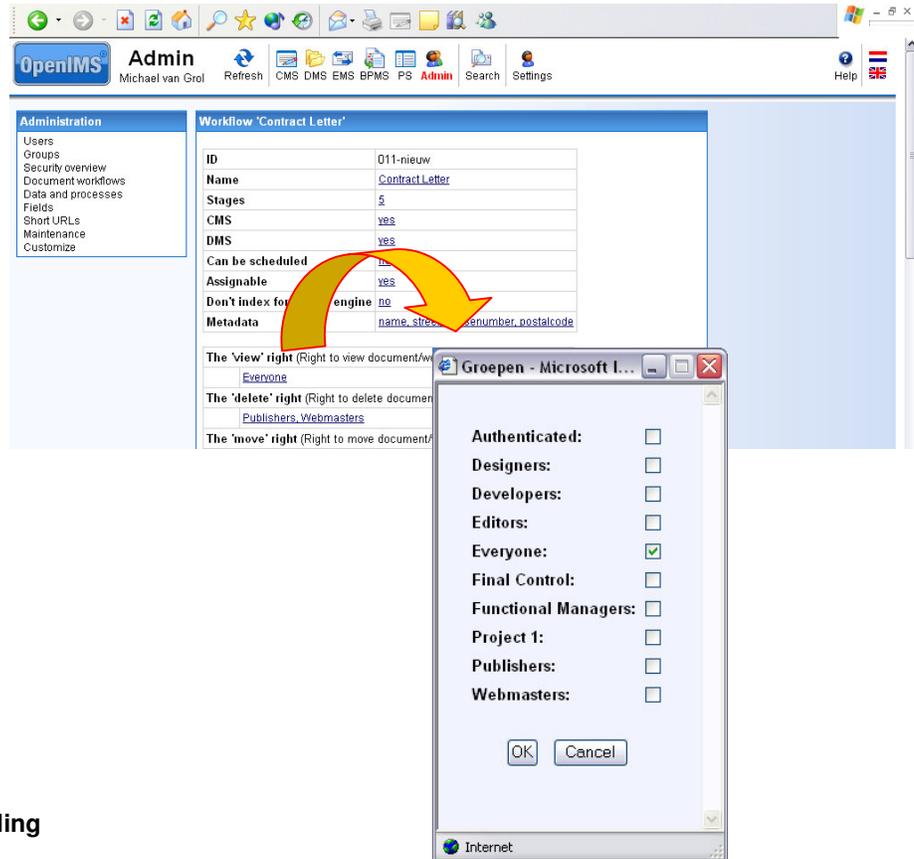
Special user groups:

- everybody
- logged in

With the group **everybody** all users are specified, with or without an account. This user group can be assigned to an internet page so that it is accessible to everybody that visits the web site.

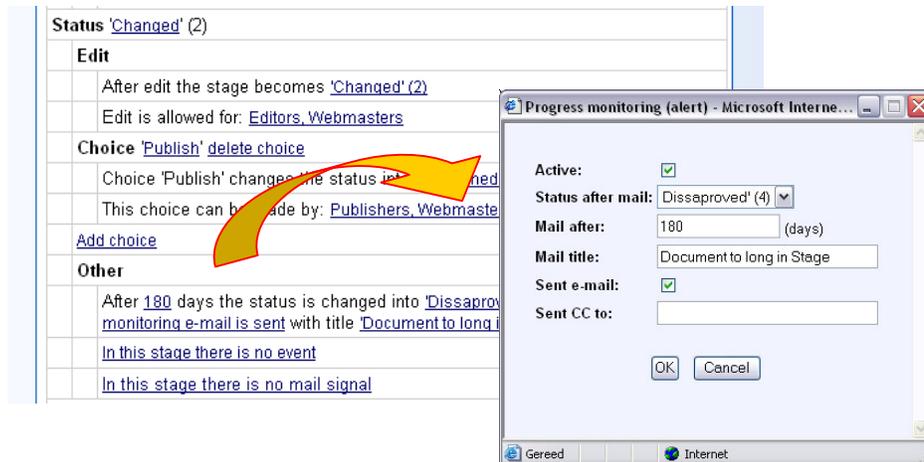
With the group **logged in** all users are specified that have a login account. For example internet pages where you need to login first. (intra- or extranet)

Under every right the user groups are specified to which the specific right is available.



4.4.3.2 Automatic signalling

You can define this function within every status of the document; maybe you would like to receive a notification when a web page hasn't been changed for over 180 days. Or maybe, in accordance with your procedures, a document may only keep a certain status for no longer then three days.



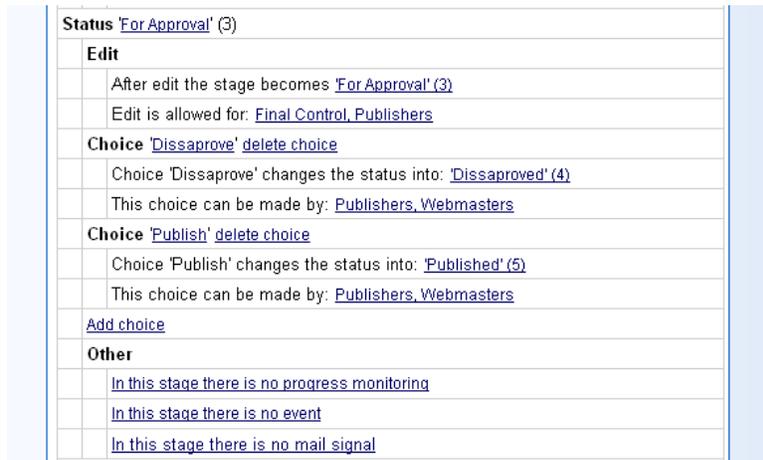
After the defined period, the automatic signalling function is being activated. You can alter the status of the document or you have an e-mail notification sent.

Active	You can activate or deactivate the automatic signalling function.
Status after signal	You can define to which status the document must be transferred after the period has expired.
Signal after	You can define the period after which the automatic signalling function must be activated.
Signal title	This is the text placed in the subject field of the e-mail that will be sent to the users.
Send e-mail	Activate or deactivate sending the notification via e-mail.
Send CC to	Send the message also to another department or manager.

4.4.3.3 Choices

A number of choices can be assigned to every stage. Every choice has a name, a status after choice and a specification of the groups that may make this choice.

New choices can be added by selecting the “Add choice” option.



Status 'For Approval' (3)

Edit

After edit the stage becomes ['For Approval' \(3\)](#)

Edit is allowed for: [Final_Control_Publishers](#)

Choice 'Dissapprove' delete choice

Choice 'Dissapprove' changes the status into: ['Dissapproved' \(4\)](#)

This choice can be made by: [Publishers, Webmasters](#)

Choice 'Publish' delete choice

Choice 'Publish' changes the status into: ['Published' \(5\)](#)

This choice can be made by: [Publishers, Webmasters](#)

[Add choice](#)

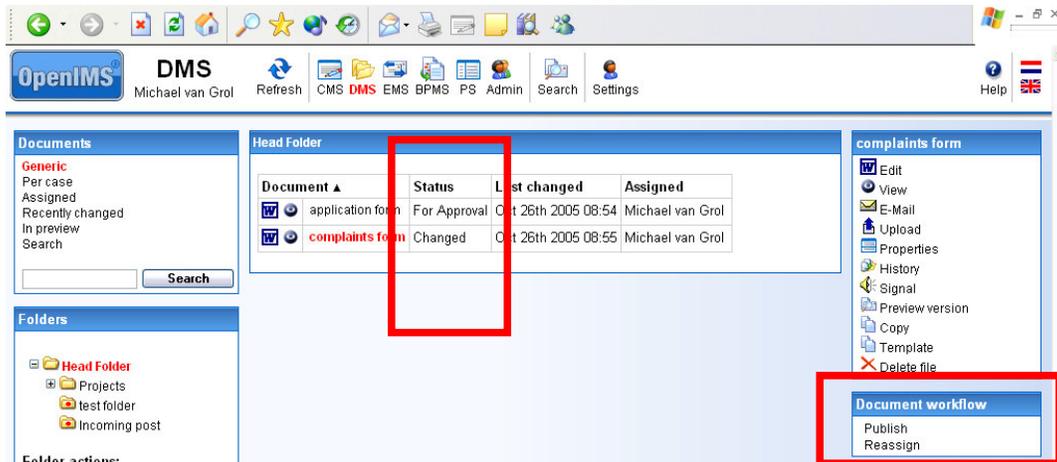
Other

[In this stage there is no progress monitoring](#)

[In this stage there is no event](#)

[In this stage there is no mail signal](#)

Within Open IMS this is visible the status in the column (see below)



OpenIMS DMS Michael van Grol Refresh CMS DMS EMS BPMS PS Admin Search Settings Help

Documents

Generic
Per case
Assigned
Recently changed
In preview
Search

Head Folder

Document	Status	Last changed	Assigned
application form	For Approval	Oct 26th 2005 08:54	Michael van Grol
complaints form	Changed	Oct 26th 2005 08:55	Michael van Grol

complaints form

- Edit
- View
- E-Mail
- Upload
- Properties
- History
- Signal
- Preview version
- Copy
- Template
- Delete file

Document workflow

- Publish
- Reassign

Folders

- Head Folder
- Projects
- test folder
- Incoming post

Folder actions:

4.4.4 Workflow stages

The workflow's most important parts are the various stages a document of web site passes before being published or archived.

With the help of a workflow designer, the number of stages can be defined.

Per stage it can be determined who may edit a document and advance it to another stage.

Example workflow with three stages:

- New
- Edited
- Published

Within the stage “New” only the user groups Authors and Webmasters may edit the document.

If the document is edited, it will automatically change to the status “Edited” where the document still can only be adjusted by the same user groups “Authors” and “Webmasters”.

To advance the document to the “Published” stage, you need to be defined to the user group “Editor” or “Webmaster”.

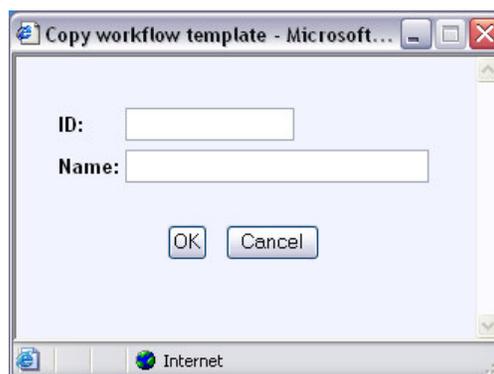
This choice is free definable by the administrator. So, different choices can be made available. By selecting the option “add choice” you can simply add new choices.

Status 'New' (1)	
New documents and webpages get stage 'New' (1)	
Edit	
<input type="checkbox"/>	After edit the stage becomes 'Edit' (2)
<input type="checkbox"/>	Edit is allowed for: Authors, Webmasters
Choice 'Publish' delete choice	
<input type="checkbox"/>	Choice 'Publish' changes the status into: 'Published' (3)
<input type="checkbox"/>	This choice can be made by: Editors, Webmasters
Add choice	
Other	
<input type="checkbox"/>	In this stage there is no progress monitoring
<input type="checkbox"/>	In this stage there is no event
<input type="checkbox"/>	In this stage there is no mail signal
Status 'Edit' (2)	
After edit the stage becomes 'Edit' (2)	
Edit is allowed for: Authors, Webmasters	
Choice 'Publish' delete choice	
<input type="checkbox"/>	Choice 'Publish' changes the status into: 'Published' (3)
<input type="checkbox"/>	This choice can be made by: Editors, Webmasters
Add choice	
Other	
<input type="checkbox"/>	In this stage there is no progress monitoring
<input type="checkbox"/>	In this stage there is no event
<input type="checkbox"/>	In this stage there is no mail signal
Status 'Published' (3)	
If a page gets stage 'Published' (3) it will be published.	
Edit	
<input type="checkbox"/>	After edit the stage becomes 'Edit' (2)
<input type="checkbox"/>	Edit is allowed for: Authors, Webmasters
Add choice	
Other	

4.4.5 New workflow profile (copying a profile)

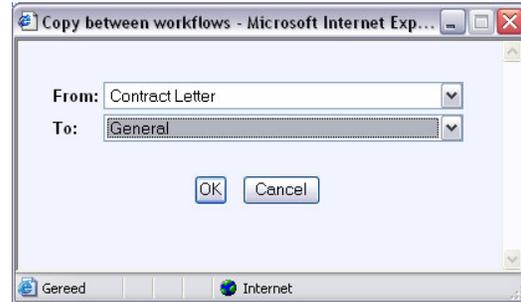
A new profile can be derived from an existing profile by using the option “Copy between workflows”. See image paragraph 4.4.1.

The profile is exactly the same as the original but you can edit it as you see fit.



4.4.6 Replacing contents workflow profile

If you use this option, you are able to copy a complete profile definition of an existing profile. You first need to create a new workflow profile, then test it and subsequently copy the old profile. The profile will be available directly.

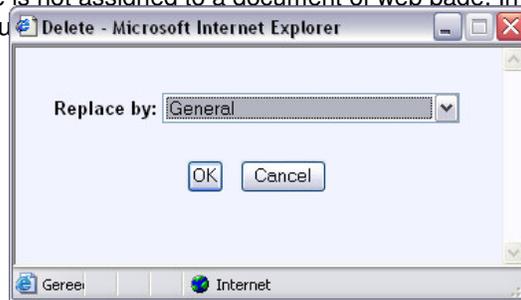


4.4.7 Removing a workflow profile

You can remove a workflow profile but only when the profile is not assigned to a document or web page. In case the profile is assigned to a document or web page, you

After you have selected the option "delete", an overview is shown of the available profiles that can replace the removed profile.

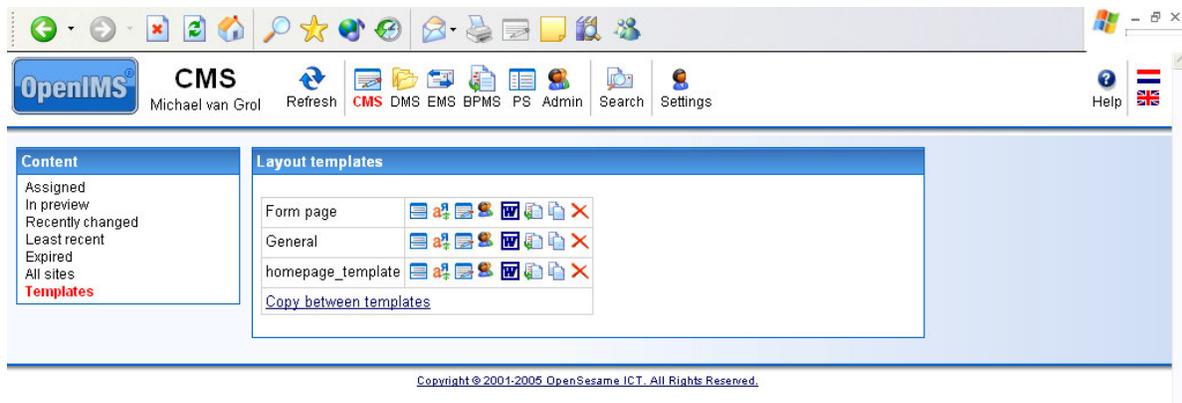
It is recommended that you determine which profile you want to use to replace the one you wish to remove, before removing it.



5 CMS templates

Within the OpenIMS-CMS design, content and components (code) are completely separated from each other.

This is a big distinction from other CMS systems where code is normally integrated in the layout- or design template.



To add certain functions from the design template to a page, OpenIMS works with so called HTML-like tags (placeholders). For example: navigation structures like showing the main menu or a click path.

The functionality of the tags (placeholders) can be created or edited by a programmer.

The advantage to this is that there will be no mixing of the lay-out and the source code.

These tags are being developed in the tailor made (or Flex) environment of OpenIMS (CMS Components), see chapter 8.

This way changes to the functionality can be made at one location and adapted to all the locations where the functionality is applied. So the source code is not embedded in the design template but in a special module: General OpenIMS Tailor Made Components.

OpenIMS ensures that layout, content and source code are compiled into a, for most browsers, comprehensible HTML page.

A programmer can therefore focus completely on making the correct functionality available, and a designer can work with the available design templates.

The layout and functionality can be previewed and tested and subsequently be advanced (published) to the production environment.

Behind the templates you will find several icons which offer the following functionalities:

	Properties of the template	The templates' name
	Layout of the template	Editing the template with a HTML editor by choice, for example: FrontPage or Dream weaver.
	Metadata of the template	Defining metadata for the properties field.
	Right to use the template	Defining which user groups are allowed to use the template.
	Edit the standard MS Word page (web content template)	Per template a predefined page (content template) can be made available. For example a standard job advert, where only the job-related text has to be added, or even a ready made web form.
	Replace all standard MS Word, Excel and PowerPoint pages by blanc pages	Use this function and you can replace all predefined pages by blanc pages.
	Copy the template	Use this function to make a copy of the template.
	Implement template	After a template has been edited, a new version is created. You can preview this new version in Concept mode. If you are satisfied with the results, you can implement the new version of the template.
	Revoke template in preview	If you are not satisfied with the changes, you can retrieve the former version, this is the last version that was implemented.
	Remove template	Use this function to remove the template.
	Copy between templates	Use this function to copy the content of one template to another.

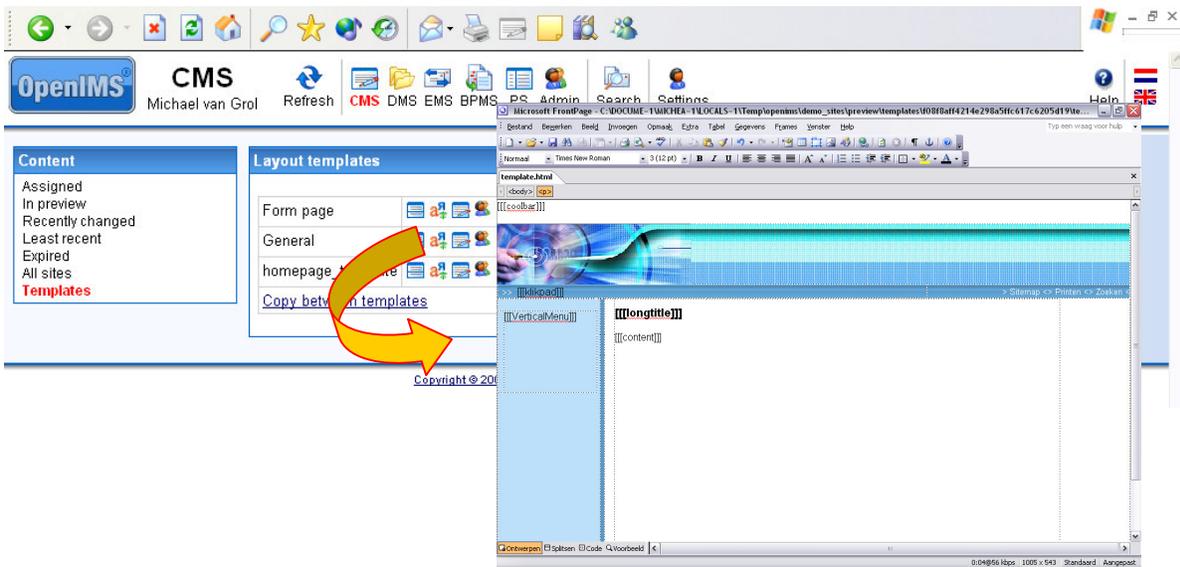
5.1 Editing templates

The strength of OpenIMS lies in the fact that users can choose which tools they would like to use. This is also true for templates. The designer may start a template in a random HTML editor. This means that Microsoft FrontPage or Dream weaver can be used without any problems to create and manage a design template.

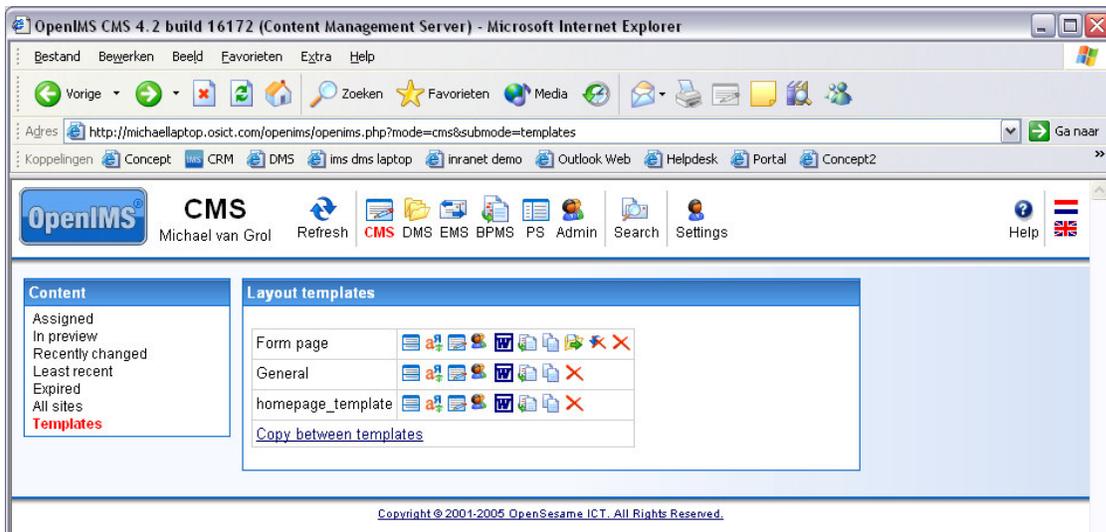
To edit a template, select the option "Template layout". The specific template will be downloaded and your HTML editor will be activated (this is all fully automated), in this case Microsoft FrontPage.

You can insert images in a template by using cut/copy and paste. Of course you can use these images also for OpenIMS-DMS.

Note: before editing templates you need to install the OpenIMS Transfer Agent



Now you can start editing. When you have finished, close Microsoft FrontPage (or the HTML editor you are working with). The changed version will be placed in OpenIMS-CMS where a new version of the template will be created.



In the example (see image above) the “Formpage layout” template is edited. You can now preview the edited version in Concept mode. You can implement the changes directly or retrieve the former version.

5.1.1 Previewing the altered template

The templates within OpenIMS are taken into production via the publication mechanism. Consequently the designer can now check if the altered template meets his demands before it is being released.

Surf the site in Concept mode to the page where the template is applied. **Only** in Concept mode you are able to preview a template. If your alterations are okay, you can implement the template.

5.1.2 Working with placeholders (tags)

A placeholder represents an OpenIMS Flex component in a template. A designer only needs to position a placeholder where a piece of code has to be performed, for example: showing the navigation menu or metadata.

The moment a visitor surfs the site, the placeholder will be replaced by a field or a button, depending on the function behind the placeholder.

A designer can define a placeholder as followed: [[[placeholder name]]]. This placeholder can be positioned at any given location within a template or content.

The image in paragraph 5.1 shows a few placeholders; submenu and click path.

5.1.2.1 Standard placeholders

OpenIMS has various standard placeholders available which you can apply to a template:

Placeholder name	description
[[[coolbar]]]	This placeholder is only visible in Concept mode, but is required because it places the CMS taskbar at the top of a page.
[[[content]]]	The content field contains the content as you can manage it in Microsoft Word.
[[[longtitle]]]	This is the long title of a page (edit via properties screen)
[[[shorttitle]]]	This is the short title of a page (edit via properties screen)

5.1.2.2 Metadata placeholders

You can also apply metadata fields to a template. These metadata are linked to the properties of a web page. You can, for instance, register a summary with each page. You will be able to manage the summary via the properties screen and show in the content.

In the OpenIMS-CMS template the designer only has to place the metadata as placeholder, for example: [[[summary]]]. OpenIMS will subsequently arrange that at that location, the metadata's contents are shown.

5.1.2.3 Components placeholders

In the OpenIMS tailor made environment (Flex), a developer can work on the navigation components of the web site. The name of the component can be processed as placeholder in the template.

The advantages are that all components can be managed on a central location and possible changes can be applied at one location without editing all the templates. See image in chapter 8.

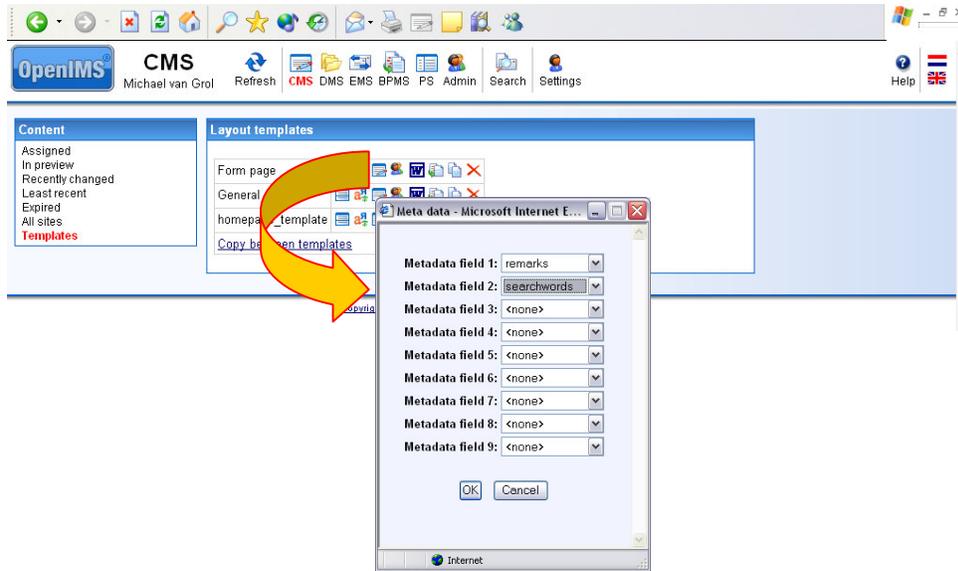
Under the header "CMS components" you will see an overview of all available navigation components that can be applied to a template.

You can also apply non-existing placeholders, anticipating their realisation. In that case OpenIMS will present the standard texts.

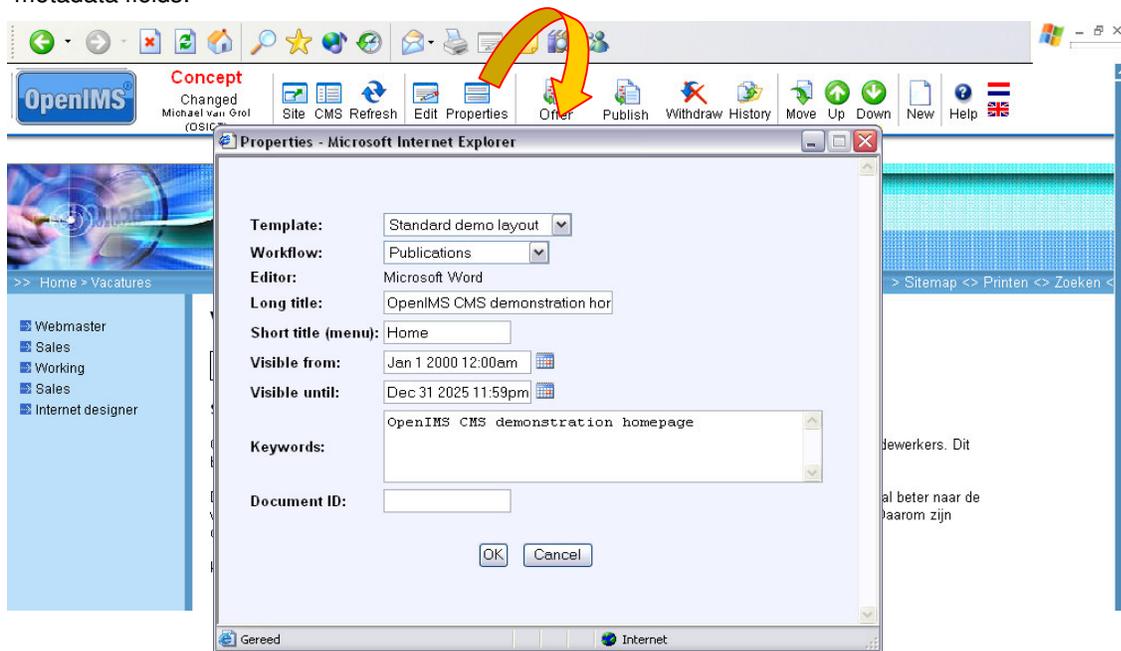
5.2 Linking metadata fields to a template

At template level you can define which metadata fields need to be available. After selecting the option "templates' metadata" you will get an overview of all available fields. Now you can apply the necessary

fields to the template. You can also apply metadata fields to the template afterwards. These metadata fields will become visible when you select the properties of a page.

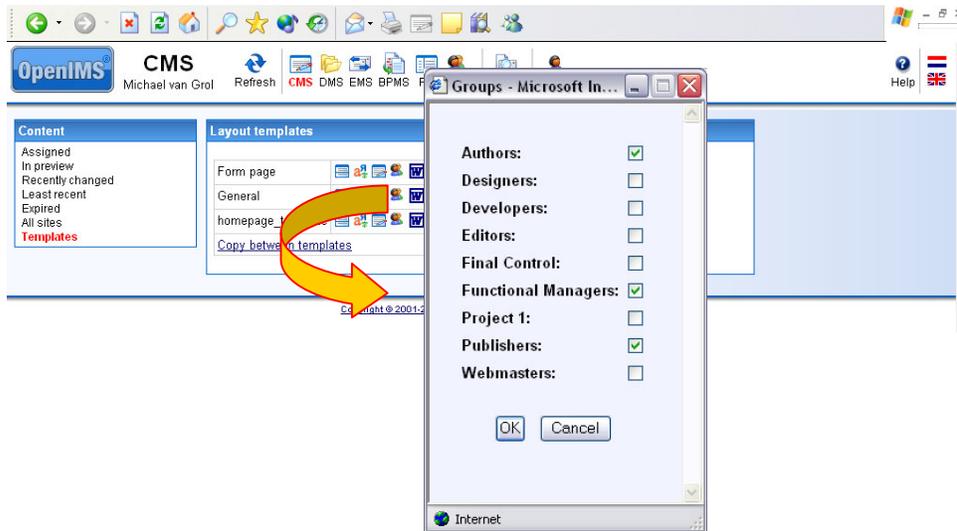


In the image above you can see that the two metadata fields “remarks” and “hits” were added to the “Demo layout” template. In the following image you can see that the properties screen has been supplied with two metadata fields.



5.3 Rights

Because users normally only manage a section of a website, they don't need to have access to all templates. Therefore you can define on a central level which user groups have access to which templates. The combo box “Templates” (see the properties screen in paragraph 5.2) only shows the templates the specific user may use.



Note: Standard all user groups have the right to use a template.

5.4 Editing web content templates

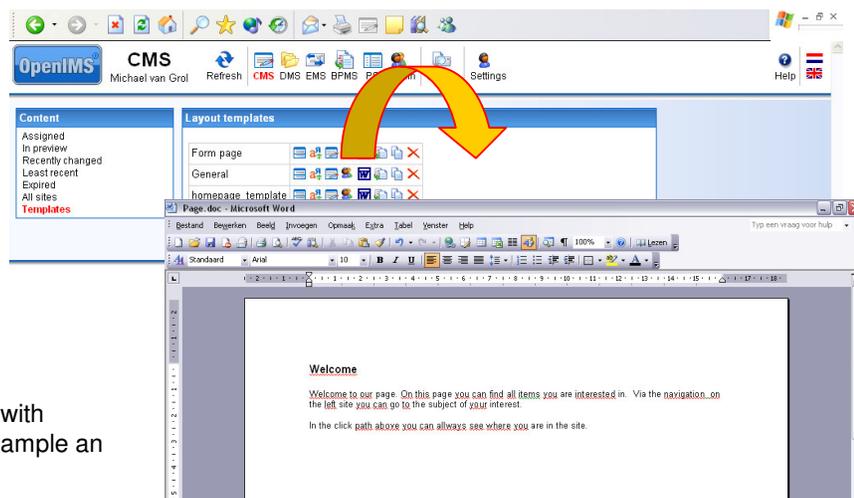
The moment you create a new web page, you need to define which template you wish to use.

Next to the layout, a template consists of a content template. This can be empty (standard) but it can also already hold some content.

Per template various editors can be predefined:

- Microsoft Word,
- Microsoft Excel,
- Microsoft PowerPoint.

In most cases a Microsoft Word document will be used with a set layout. For example standard layouts for a press release or a job advert. The template can also be supplied with images or other objects, for example an excel table.

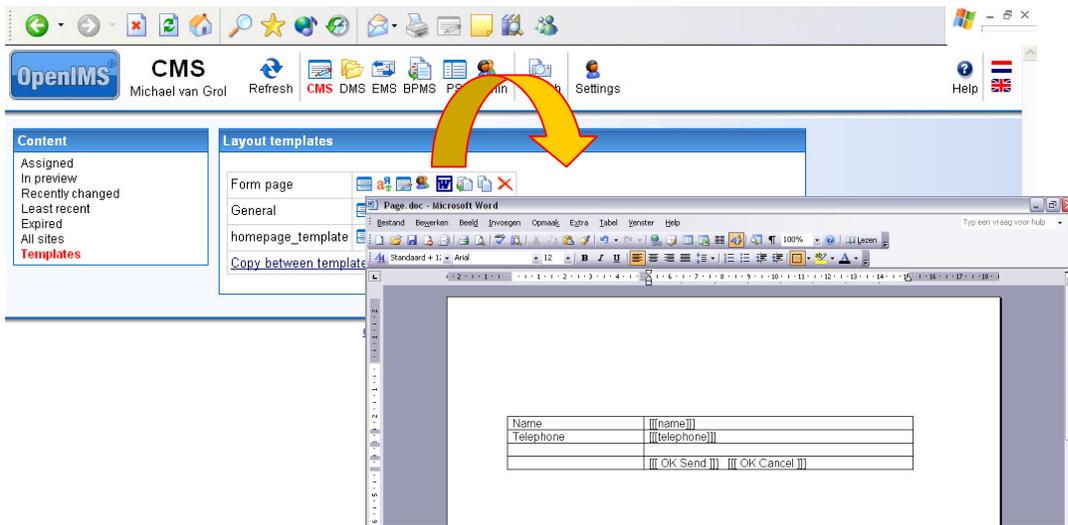


5.4.1 Templates and web forms

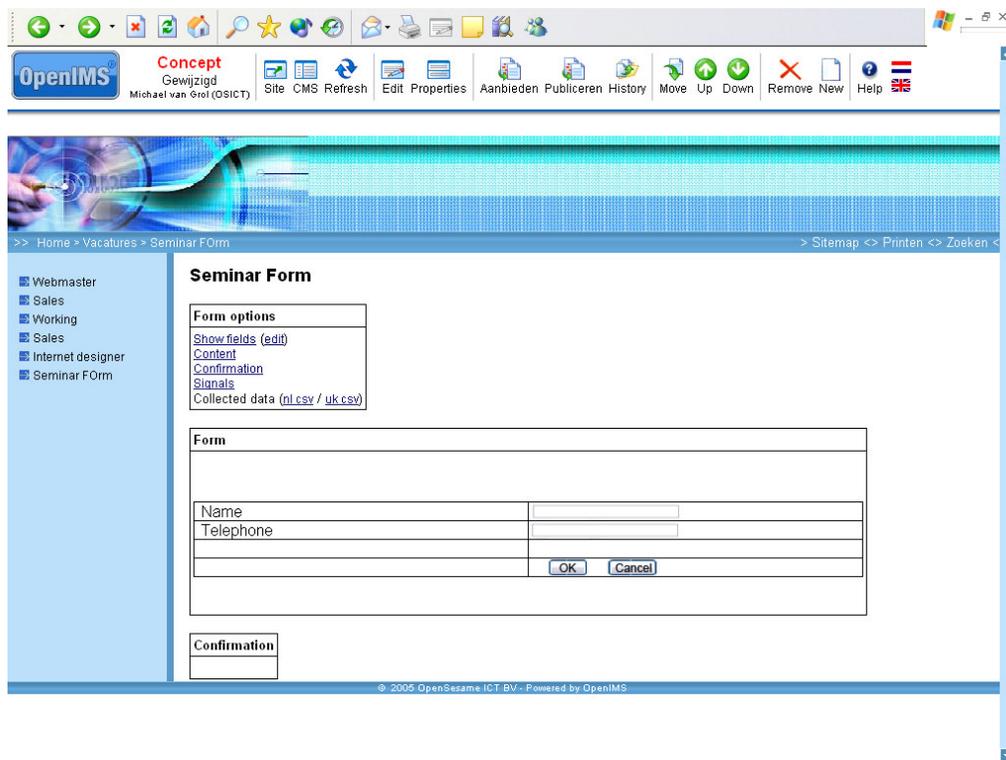
It is also possible to place a web form under a template. When the user, while creating a new page, chooses the form template, the content of the defined form will be placed in the page.

You can give the form a standard layout and add the standard fields.

A user can subsequently add new fields and remove the existing ones.



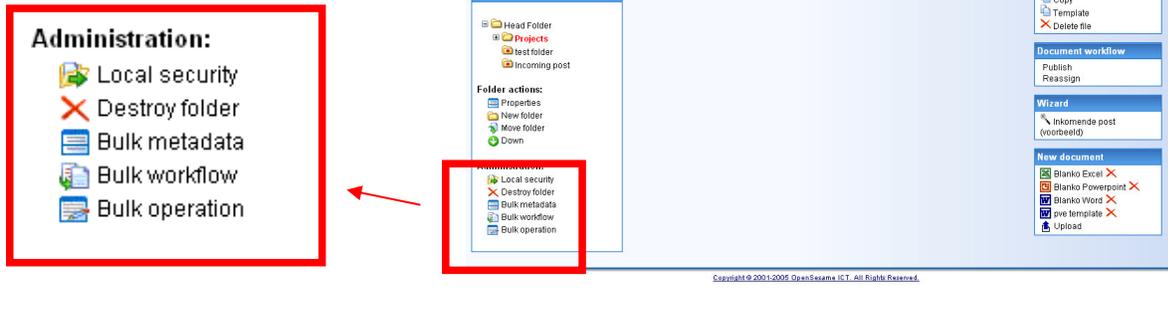
The image below shows a new form based on the previously inserted template.



6 DMS

OpenIMS DMS has several functions available to which only users with the “Admin right” have access to. These are:

- Local security,
- Destroy folder,
- Bulk metadata,
- Bulk workflow,
- Bulk operation.



Note: all functions are active in the current folder and the underlying subfolders. This means that you first need to select the folder upon which you want to execute the action.

6.1 Local security (folders)

Normally a user who is placed in a user group, has the same role (read: rights) within the whole DMS system.

However it is imaginable that a certain user has different accessing rights to a certain project.

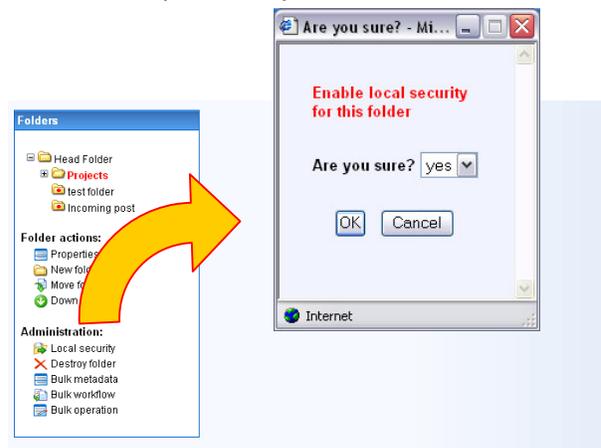
To make sure that nobody can access documents they are not allowed to see, it is possible to assign specific rights on folder level. This resource is called local security.

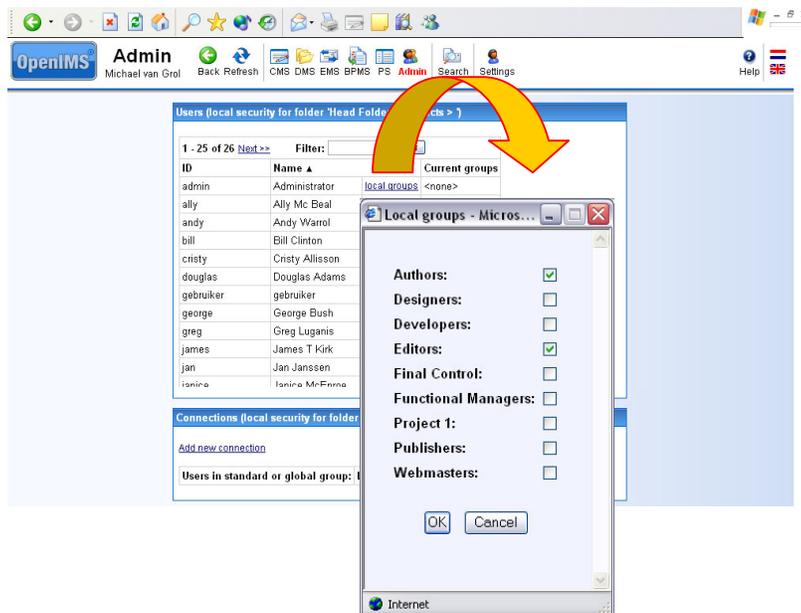
The moment you access local security, the existing workflow profiles are still active. However you need to reassign the users to the user groups that are used within the workflow profile. So you needn't create new profiles or user groups to secure a project or folder.

The secured folder is provided with a red dot.

6.1.1 Adding local users

Via “Change security” you can give users access to the secured folder by placing them in the correct local groups. Seek the user name and select “local groups”

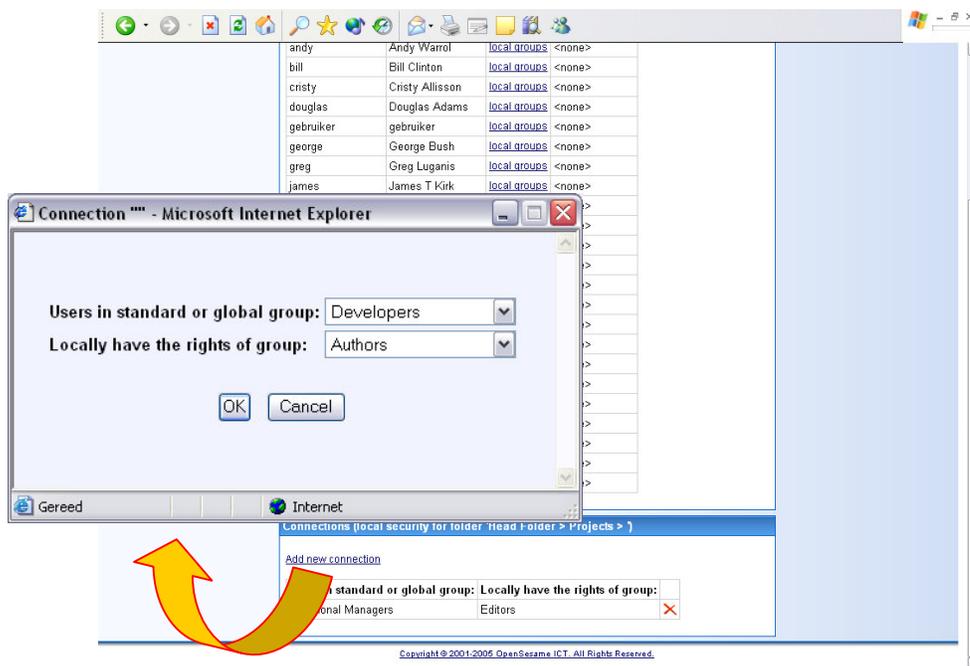




6.1.2 Adding Local security via usergroups

In some occasions it might be more useful to assign rights via local security, not on user level but to a complete group.

The advantage of doing so is that all users that are in a standard user group are added directly. When a user is removed from a standard group, the user has no rights to the folders with local security. It works best to connect users to roles that are connected to a workflow.



6.1.3 Removing local security

You can choose option “Remove security” to remove the local security.

6.2 Destroy folder (including subfolders and documents)

As an administrator you can remove a complete folder structure (folder + subfolder + documents).

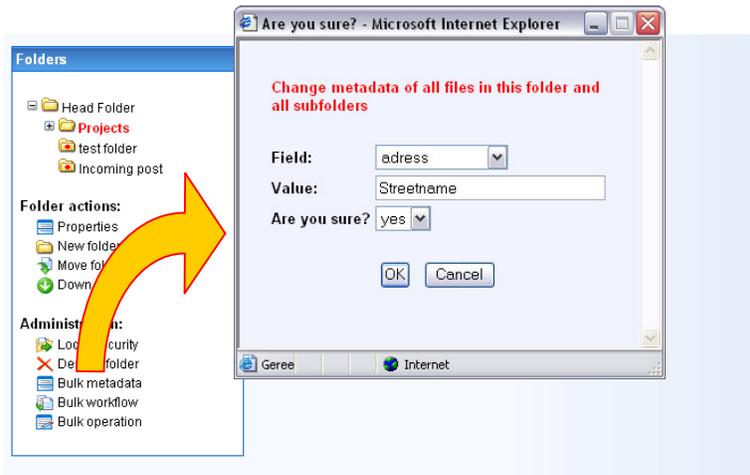
Note: when you use this option to remove folders and documents, there is no way retrieve them afterwards. The folders and documents will be permanently removed.

6.3 Bulk metadata

This function gives you the opportunity to add additional meta information to all documents in a certain folder.

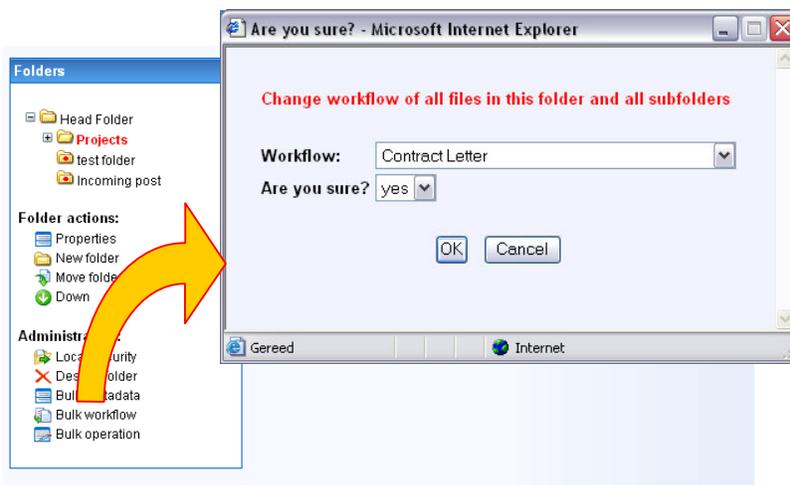
Note: the system will also add the information to the documents in the underlying subfolders.

This function is not available for Macintosh users.



6.4 Bulk workflow

You can use this option when you want to link all documents in a folder (and subfolder) to a new workflow.

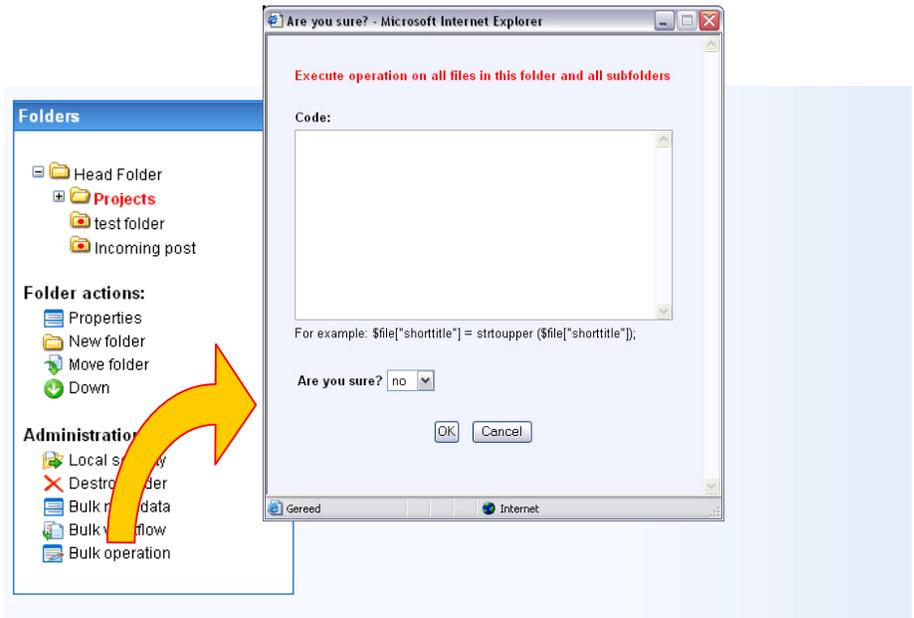


This function is not available for Macintosh users.

6.5 Bulk operation

The bulk operation is meant for the execution of a special function onto all documents in a folder and its subfolders. The operation is to be defined through a PHP script.

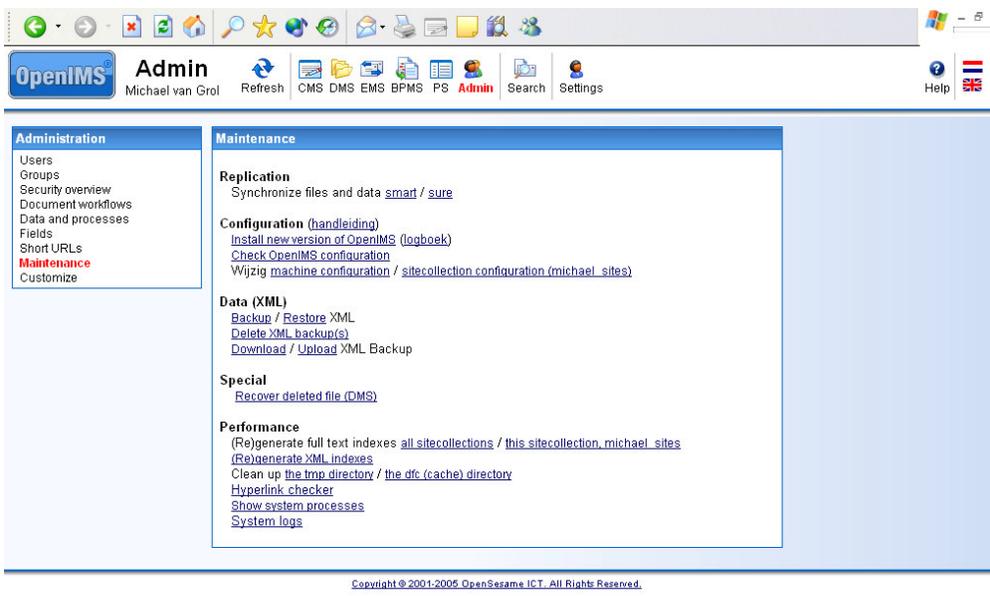
This function is not available for Macintosh users.



7 Maintenance

From the maintenance screen an administrator can activate various administrative functions. In the next paragraphs the following will be discussed:

- Installing the latest OpenIMS version;
- Indexing;
- Cache.

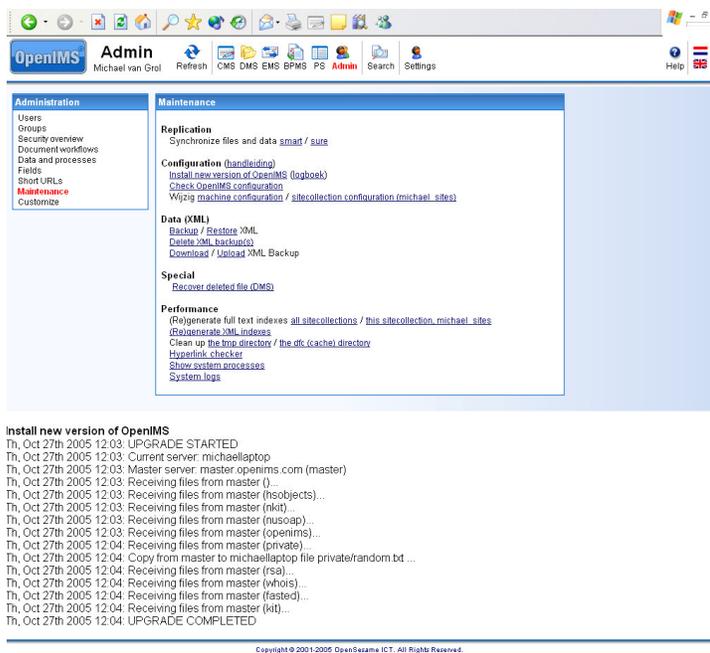


For an explanation of other maintenance options, please visit the web site: <http://doc.openims.com>.

7.1 Installing the latest version of OpenIMS

OpenIMS has been developed with the idea that the installation of a more recent version should run smooth, quick and simple. Therefore you only need to select the hyperlink “Install OpenIMS update”.

Note: to be able to install the latest version of OpenIMS, the OpenIMS server needs to have an internet connection available.



7.2 Indexing en caching

7.2.1 Generating an index

In case you are either:

- Setting up a new system, or
- Synchronizing a standby system with the production server;

The search index needs to be regenerated. You can do this by using the following function:

“(Re)generate full text indexes (all sitecollections) / (Re)generate full text indexes (this site collection, <local site name>)”

This function can be used for CMS, DMS as well as for EMS.

During (re)generating the indexes, the search engine will not provide you with entire results. It is therefore recommended to execute this function after office hours.

The documents that have been placed in the production environment of OpenIMS, will automatically be indexed straight away.

7.2.2 Generating all XML indexes

With the option **“(Re)generate all XML indexes”** all XML indexes will be removed. While OpenIMS is running, it will regenerate the indexes. Because this may lead to extreme delays in OpenIMS, it is recommended to execute this function after office hours. Directly after removing the indexes, the most common used functions need to be activated to rebuild the joining indexes.

7.2.3 Organizing the tmp and dfc directory

With the option **“organize the tmp directory”** the OpenIMS tmp directory is organized. This is another directory then the operating systems' tmp directory. Except clearing disk space, this option has no other effect.

With the option **“organize the dfc (cache) directory”** the cache of OpenIMS is cleared. This may lead to some delay in complex functions and in comparing large text files.

7.2.4 Showing all running system processes

With the option **“Show all running system processes”** you will get an overview of all running system processes. You can disrupt a process permanently by removing it from the overview.

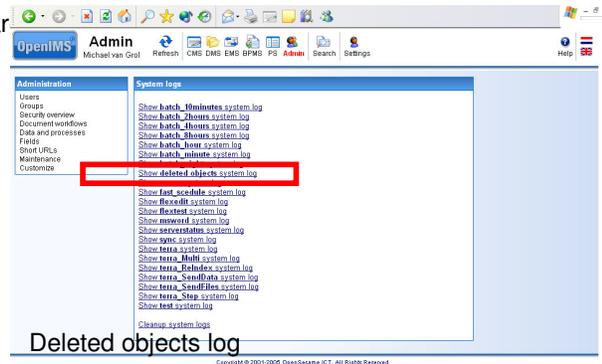
Note: We recommend that you access maintenance menu's functions only after office hours.

7.3 Recovering deleted files in the DMS

OpenIMS offers the possibility to recover files that administrators in the maintenance screen.

Step 1.

Go to the system log (Admin->maintenance >System logs (1)) named 'deleted objects log' in which you can see which files were deleted by whom and when that has happened.



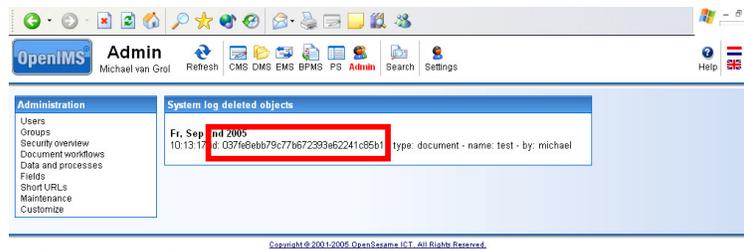
Step 2:

Click on the date on which the document has been deleted.

Now you can determine the ID of the document.

Step 3:

Click on the document you want to restore. The ID of that document is shown (32 characters)



Document ID

Step 4:

Copy the ID of that document.

Step 5.

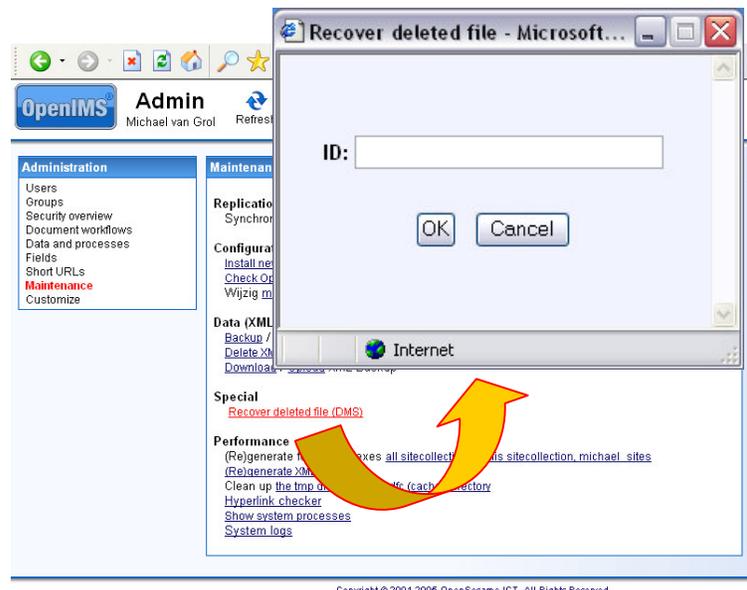
Go to the Admin section of OpenIMS

Step 6

Click on 'recover deleted file' (2) The screen that appears then asks for the ID of the document ID. that you have just copied.

Step 7

Paste the copied ID in het field and click on 'OK'.



The system now jumps to the recoved document in the DMS. The document is now available in the DMS.

Step 8

Check if the metadata are copied correctly.

Note: this is a 'best effort'feature. The only guaranteed way to retrieve documents that are deleted is by restoring a backup (preferable on a test machine)

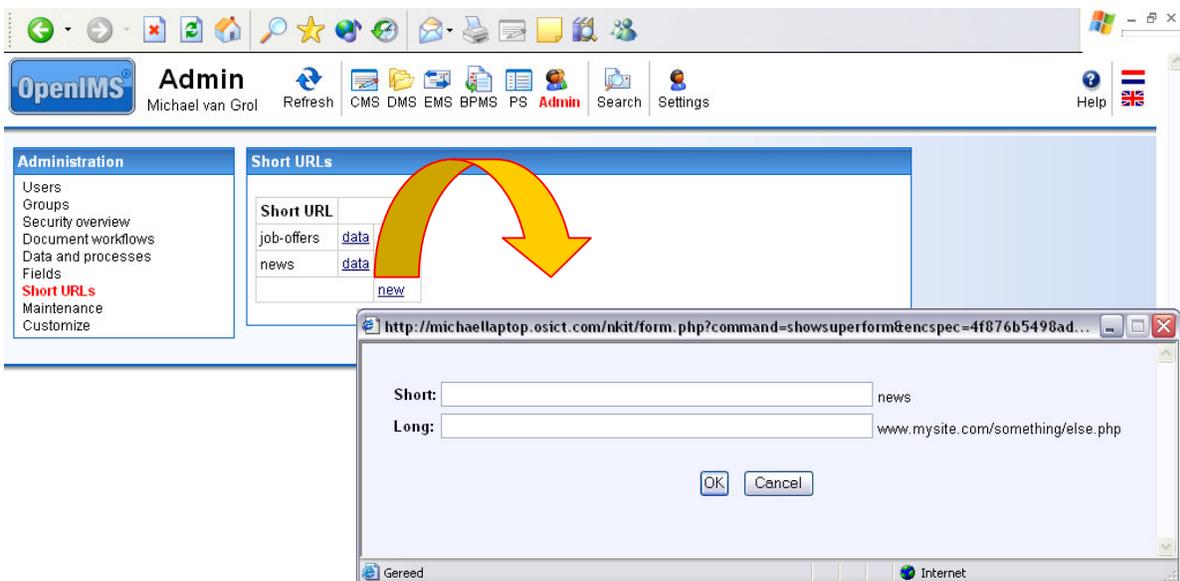
8 Short URL's

You can define a short URL for the part of a web site that is often referred to. For example the job offers within your site.

<your site name>/<short url>, for example www.openims.com/job-offers

Next to the address of a web page, it is also possible to add an address to a document. In fact, you can add a reference to any page or document that is accessible within OpenIMS.

Within this function you are able to define these short names yourself. It is possible to include existing domains. In the field "short" you enter the short name, in the field "long" you enter the original url that is referred to. The moment the short URL is in the list, it becomes active.



The short URL can look like this:

<http://your-site-name/job-offers/developer/senior>

You have complete freedom in defining the short url.

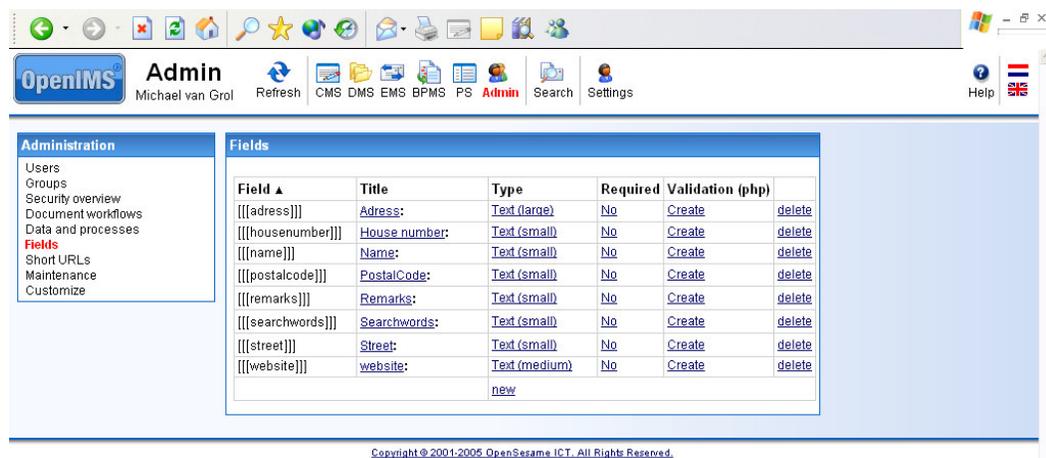
9 Managing fields

Within OpenIMS all fields are managed from one central location. Subsequently you can use these fields as metadata fields or as form fields. The advantage is that you can only define and manage fields at one location; when you edit a field, this alteration is directly available within all applications that use the specific field.

9.1 Fields overview

After selecting the option "Fields", the already defined fields will be shown. Every field has a number of standard properties:

- Fieldname,
- Title,
- Type,
- Required,
- Validation.



Field ▲	Title	Type	Required	Validation (php)	
[[[address]]]	Address:	Text (large)	No	Create	delete
[[[housenumber]]]	House number:	Text (small)	No	Create	delete
[[[name]]]	Name:	Text (small)	No	Create	delete
[[[postalcode]]]	PostalCode:	Text (small)	No	Create	delete
[[[remarks]]]	Remarks:	Text (small)	No	Create	delete
[[[searchwords]]]	Searchwords:	Text (small)	No	Create	delete
[[[street]]]	Street:	Text (small)	No	Create	delete
[[[website]]]	website:	Text (medium)	No	Create	delete
					new

Field	This is the name of the field as it is used within the applications.
Title	This text will be shown to the user or visitor of the web site. The title shall be included in an error report, in case a validation is not correct or a required field has not been filled out.
Type	Via Type can be indicated which functionality has been applied to a field. OpenIMS had the following field types: text, list, text unit, yes/no, date, time and date + time (these types will be described in the next table).
Required	With this property, a visitor can be forced to fill out a certain field.
Validation (php)	Using this property, you can validate fields through phpscripts. The php scripts you can use to check if the visitor had entered a proper e-mail address or area code. Example: with this script you can validate if an emailaddress is correct: <pre> \$regexp = "^[_a-z0-9-]+(\\.[_a-z0-9-]+)*@[a-z0-9-]+(\\.[a-z0-9-]+)*\\.([a-z]{2,4})\$"; if (!eregi(\$regexp, \$input)) { \$error = "The email address is not valid."; } </pre>

OK and CANCEL buttons

Within OpenIMS you can determine the text on these two buttons yourself. Through the OK button a form can be delivered, so you always need to place it in a form.

Definition: `[[[OK:<button text>]]]` , `[[[CANCEL: <button text>]]]`

Examples: `[[[OK:Send]]]` , `[[[CANCEL: Delete]]]`

Description available field types:

Type name	Description	Remarks
Text	Free text but limited to a fill in field with one line (single line).	The length of the field is predefined. The user is able to choose between a long and a short field.
List	Via a list a menu (combo box) can be filled out. A visitor can select an option from of a predefined list.	
Text unit	Free text (multi line).	The length of the field is predefined. The user is able to choose between a long and a short field.
Yes/no	The check box can, for example, be used for questions with a yes/no answer.	
Date	Possibility to enter a date.	Always starts with the actual date.
Time	Possibility to enter a time.	
Date + time	Combination of date and time.	

9.2 Adding a field

In the following example a required text field is created, called 'Company'.

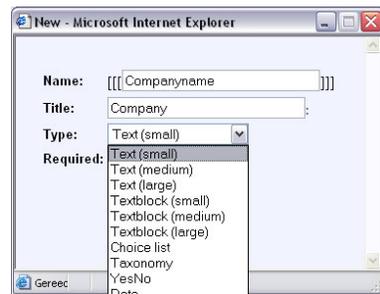
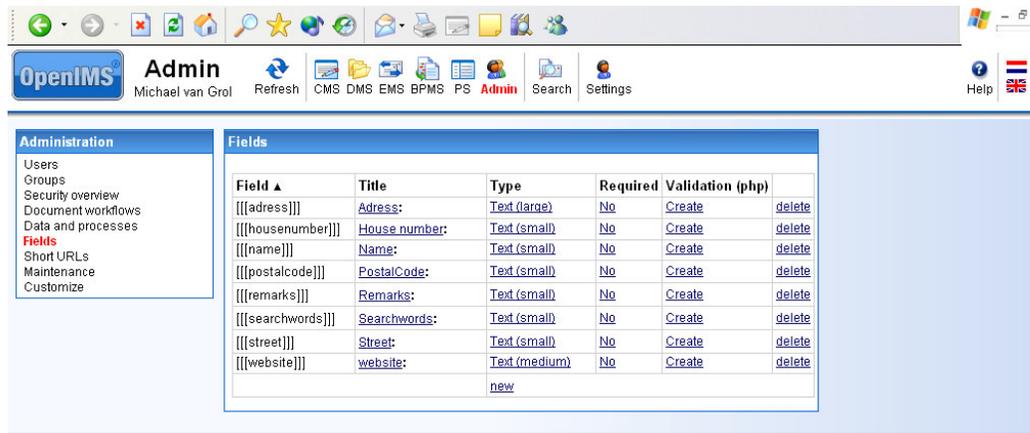
Step 1 select "New" at the bottom of the list with fields.

A dialog is opened where you can specify which type of field you wish to use.

Step 2 enter the name of the field, the title and select the required option.

Step 3 select the "OK" button, the new field will be created.

Now the field is operational and can be applied to OpenIMS fields.

Field	Title	Type	Required	Validation (php)
[[[address]]]	Address:	Text (large)	No	Create delete
[[[houenumber]]]	House number:	Text (small)	No	Create delete
[[[name]]]	Name:	Text (small)	No	Create delete
[[[postalcode]]]	PostalCode:	Text (small)	No	Create delete
[[[remarks]]]	Remarks:	Text (small)	No	Create delete
[[[searchwords]]]	Searchwords:	Text (small)	No	Create delete
[[[street]]]	Street:	Text (small)	No	Create delete
[[[website]]]	website:	Text (medium)	No	Create delete
		new		

9.3 Editing a field

Naturally all fields can be edited, even after the field has been created. The editing takes place at a central location and will be applied directly to all locations where this field is being used (forms, documents and content).

9.4 Linking fields (metadata) to documents

To be able to assign fields as metadata in a document or web page, you, as administrator, must link the fields to a workflow profile.

Go to the "Workflow" overview via the "Admin" overview. Per workflow profile you can define a specific set of metadata. See paragraph 4.4.2.4 Adding metadata.

Of course the user needs to link the right workflow profile to the document.

9.5 Linking fields (metadata) to web content

See paragraph 5.2 linking metadata fields to a template. As administrator you can select how metadata fields should be linked to a web page:

- via a workflow profile; or
- on template level.

9.6 Linking fields to web forms

This subject is described in detail in the "CMS user manual". You can download this document on <http://doc.openims.com>.

10 Using metadata fields in documents

Within OpenIMS-DMS you can automatically supply documents with metadata from the properties screen of the specific document. Therefore document templates such as standard letters, contracts or even AutoCAD drawings can be supplied with pre defined information from OpenIMS or even from external information sources like an ERP or CRM system. To be able to place information from the system in a document, the document must have a special OpenIMS macro available. At the moment there are macros available for:

1. Microsoft Office (Word, Excel),
2. AutoDesk AutoCAD.

It depends on the definition within the used workflow profile whether the metadata can be placed in a document. This is because the metadata fields are linked to a workflow profile (from the Admin environment)

Macro security

You need to put the macro security on “Low” (in MS Word Excel etc). You can do this by selecting Tools (Extra) → Macro → Security and setting the security level on “Low”.

Standard fields

Every document in OpenIMS has a few standard metadata fields available which can be retrieved by means of a macro. These are:

- Document name (name),
- Document version (version).

Next, organization specific metadata fields can be added (via Admin environment), for example department, division, project number, document number, etc.

10.1 Microsoft Word

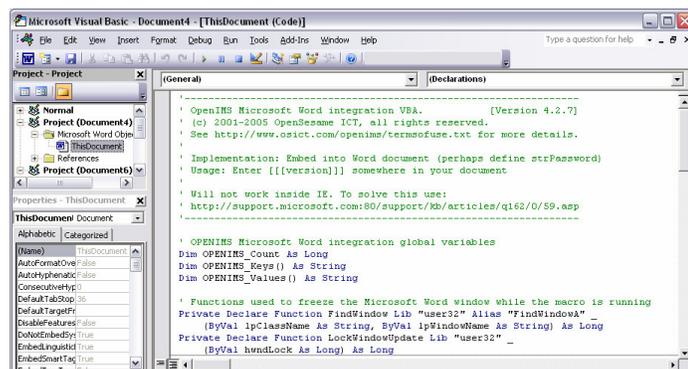
10.1.1 Retrieving the macro

Always use the most recent version of the Microsoft Word macro. You can retrieve it via hyperlink:

<http://www.openims.com/install/msword.txt>

10.1.2 Placing the macro

1. Select the complete macro (text) and copy it to the clipboard of your PC.
2. Open the Word document in which you want to insert the macro.
3. Select menu Tools (Extra) → Macro → Visual Basic Editor.
4. Select “ThisDocument”.
5. Insert the macro code in the right hand tab via “cut / paste”.
6. Close the Microsoft Visual Basics screen.
7. Now you can place the metadata fields.



```

Microsoft Visual Basic - Document4 - [ThisDocument (Code)]
File Edit View Insert Format Debug Run Tools Add-Ins Window Help
Project - Project (General) (Declarations)
Project - Project
Normal
Project (Document4)
Microsoft Word Object Model
ThisDocument
References
Project (Document6)
Properties - ThisDocument
ThisDocument Document
Alphabetic Categorized
(Name) ThisDocument
AutoFormatOver False
AutoHyphenate True
ConsecutiveHyphens
DefaultTabStop 36
DefaultTargetFrame
DisableFeatures True
DoNotEmbedStyles
EmbedLinkStyle True
EmbedSmartTag True
' OpenIMS Microsoft Word integration VBA. [Version 4.2.7]
' (c) 2001-2005 OpenSesame ICT, all rights reserved.
' See http://www.orict.com/openims/termsfuse.txt for more details.
' Implementation: Embed into Word document (perhaps define strPassword)
' Usage: Enter [[[[version]]]] somewhere in your document
' Will not work inside IE. To solve this use:
' http://support.microsoft.com:80/support/kb/articles/q162/0/59.asp
' OpenIMS Microsoft Word integration global variables
Dim OPENIMS_Count As Long
Dim OPENIMS_Keys() As String
Dim OPENIMS_Values() As String
' Functions used to freeze the Microsoft Word window while the macro is running
Private Declare Function FindWindow Lib "user32" Alias "FindWindowA" _
    (ByVal lpClassName As String, ByVal lpWindowName As String) As Long
Private Declare Function LockWindowUpdate Lib "user32" _
    (ByVal hwndLock As Long) As Long
    
```

10.1.3 Placing metadata tags

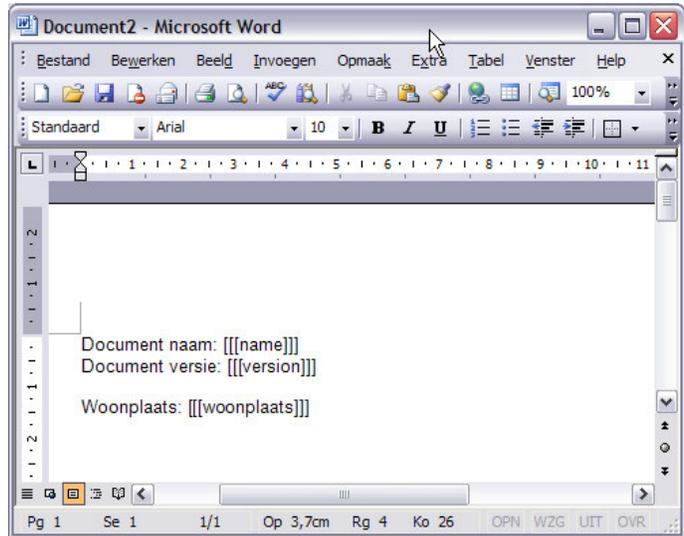
The metadata tag can be defined as followed:

[[[metadata field name]]]

You can determine through the workflow profile which metadata fields are available. You can view this, for example, through the properties screen of the specific document.

Insert the necessary fields (see image) and close the document. Make sure that in the properties screen, the meta information is filled in.

Open the document and the metadata tags will be replaced dynamically by the information from the properties screen.



10.2 Microsoft Excel

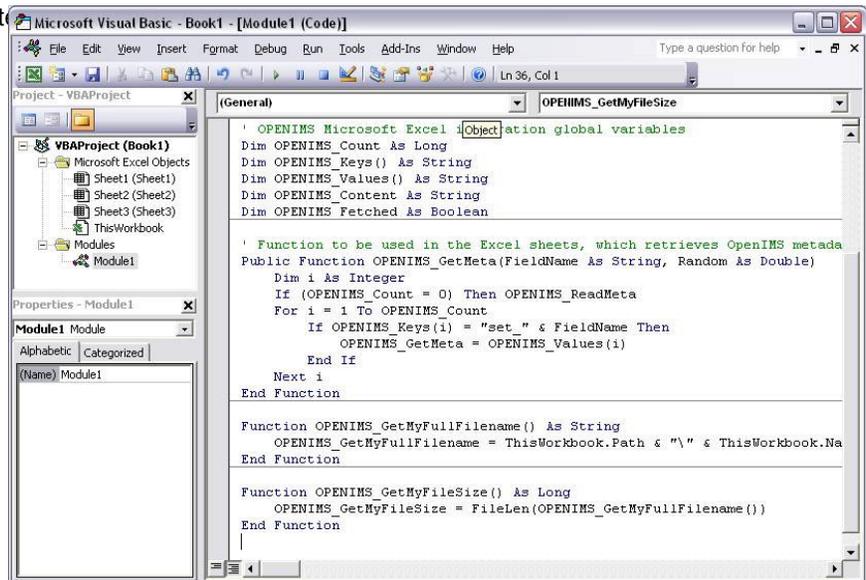
10.2.1 Retrieving the macro

Always use the most recent version of the Microsoft Excel macro. You can retrieve it via hyperlink:

<http://www.openims.com/install/msexcel.txt>

10.2.2 Placing the macro

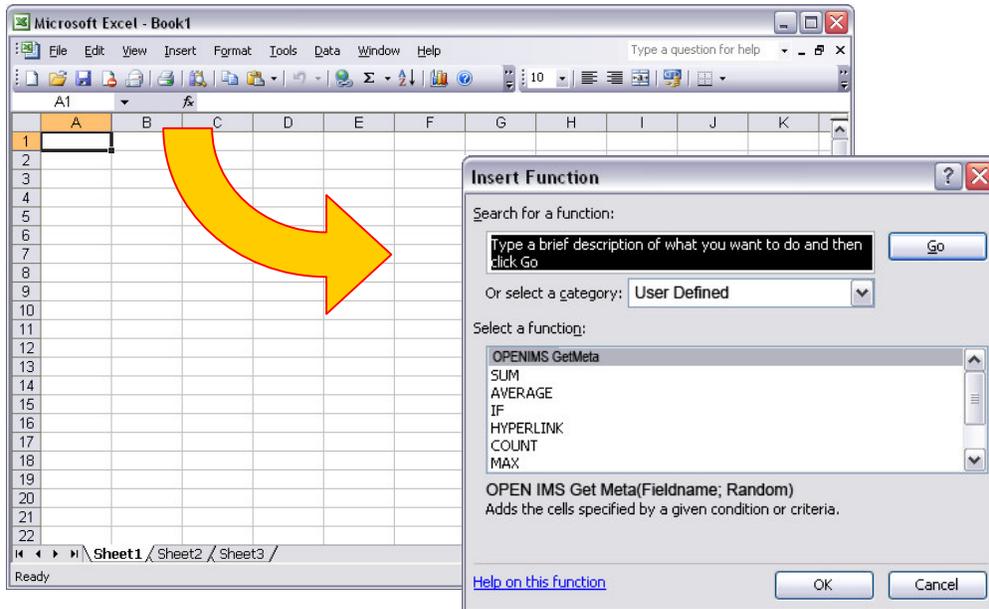
1. Select the complete macro (to be pasted)
2. Open the Excel document in which you want to insert the macro.
3. Select menu Tools (Extra) → Macro → Visual Basic Editor.
4. Select Insert → Module.
5. An empty module will be placed under the folder "Module". Select this module.
6. Insert the macro code in the right hand tab via "cut / paste".
7. Close the Microsoft Visual Basic screen.
8. Now you can place the metadata fields.



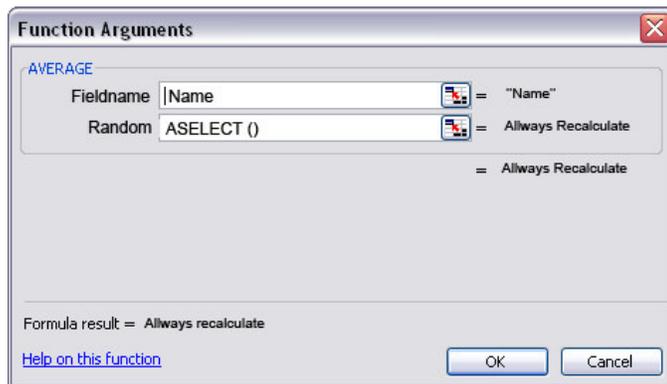
10.2.3 Placing metadata tags

You can insert the metadata tags in the Excel document.

1. Go to the cell where you want the metadata to be shown.
2. Select “Insert function”.
3. Select from the combo box option “by user defined”.
4. Select “OpenIMS GetMeta”.



5. The following screen will be opened:
6. At FieldName fill in the name of the metadata field.
7. At Random select “ASELECT()” or “Random()”, depending on your MS Excel version.
8. Close the MS Excel document, fill in the specific meta information (properties screen) and reopen the document.
9. Subsequently all metadata tags will be replaced dynamically.



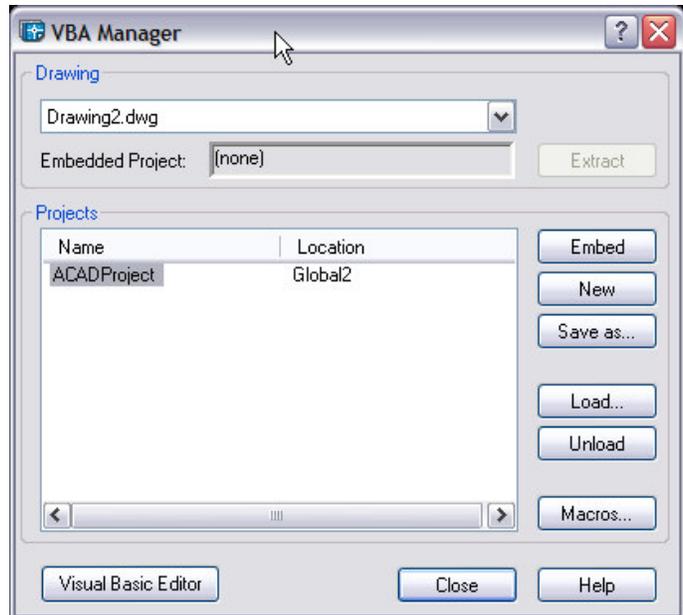
10.3 AutoCAD

10.3.1 Retrieving the macro

Always use the most recent version of the AutoCAD macro. You can retrieve it via hyperlink:
<http://www.openims.com/install/autocad.txt>

10.3.2 Placing the macro

1. Select the complete macro (text) and copy it to the clipboard of your PC.
2. Open the AutoCAD drawing in which you want to insert the macro.
3. Select menu Tools (Extra) → Macro → Visual Basic Editor.
4. Select "ThisDrawing".
5. Insert (paste) here the macro code.
6. Close the Visual Basic Editor.
7. Select menu Tools (extra) → Macro → VBA Manager and select here the ACADProject file.
8. After the file has been selected, see image, select "Embed".
9. The macro is now added to the drawing.
10. Now you can place the metadata fields at random locations in the drawing.



10.3.3 Placing metadata tags

At the moment there are two kinds of tags:

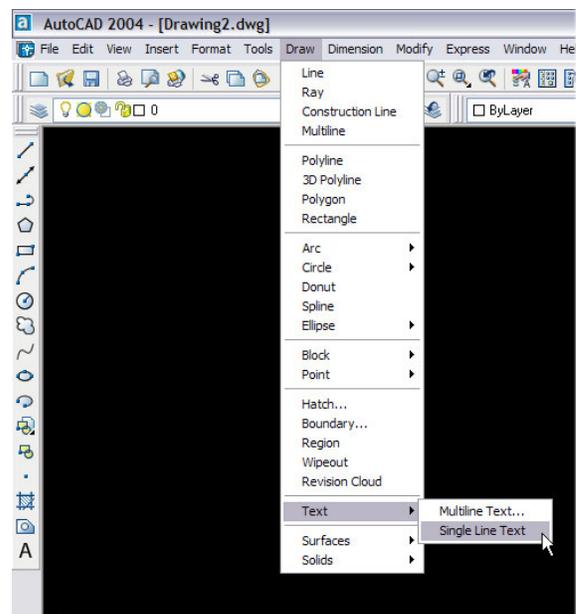
- Tag on the drawing through a Single Line Text object.
- Tag in an attribute which is linked to a block title.

To make the OpenIMS tag visible, you need to close the drawing and reopen it. OpenIMS will place the meta information from the properties screen in the respective tag.

Placing Single Line Text

You can insert the metadata tags in the AutoCAD document:

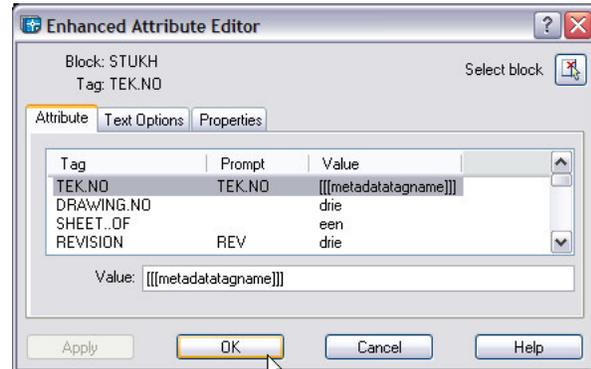
1. Go to the position where you want the metadata tag to be.
2. Select Draw → Text → Single Line Text.
3. Fill in the name of the metadata tag according to the following definition: [[[metadata tag name]]]



Tag in an attribute which is linked to a block

Go to the block where you want the tag to be placed. Choose the block attribute of which you want the contents to be filled by OpenIMS, and place the OpenIMS tag [[[.....]]]. See image.

Note: it is not possible to assign an OpenIMS tag to an attribute that is not linked to a block.



Tag security to overwriting

After you have placed an OpenIMS tag, it will be managed by OpenIMS. In case a user/designer wants to change the tag, a warning will arise and the old data will be restored.

Would you want to change or replace the tag anyway, replace the tag with "!!!". Subsequently it is possible to edit the contents and for example insert another OpenIMS tag.

10.4 Microsoft Visio 2003

OpenIMS has a basic functionality to include metadata in a Microsoft Visio Drawing. As Microsoft Visio is used in many different ways, it is possible that the macro does not function in certain situations.

10.4.1 Retrieving the Visio macro

Always use the most recent version of the macro for Microsoft Visio. You can retrieve the macro via the following hyperlink: <http://www.openims.com/install/msvisio.txt>

10.4.2 Placing

1. Select the complete macro (text) and copy it to the clipboard of your PC.
2. Open the Microsoft Visio document in which you want to insert the macro.
3. Select menu Tools (Extra) → Macro → Visual Basic Editor.
4. Select "ThisDrawing".
5. Insert (paste) the macro code in the tab on the right.
6. Close the Visual Basic Editor.
7. Now you can place the metadata fields.

10.4.3 Placing metadata tags

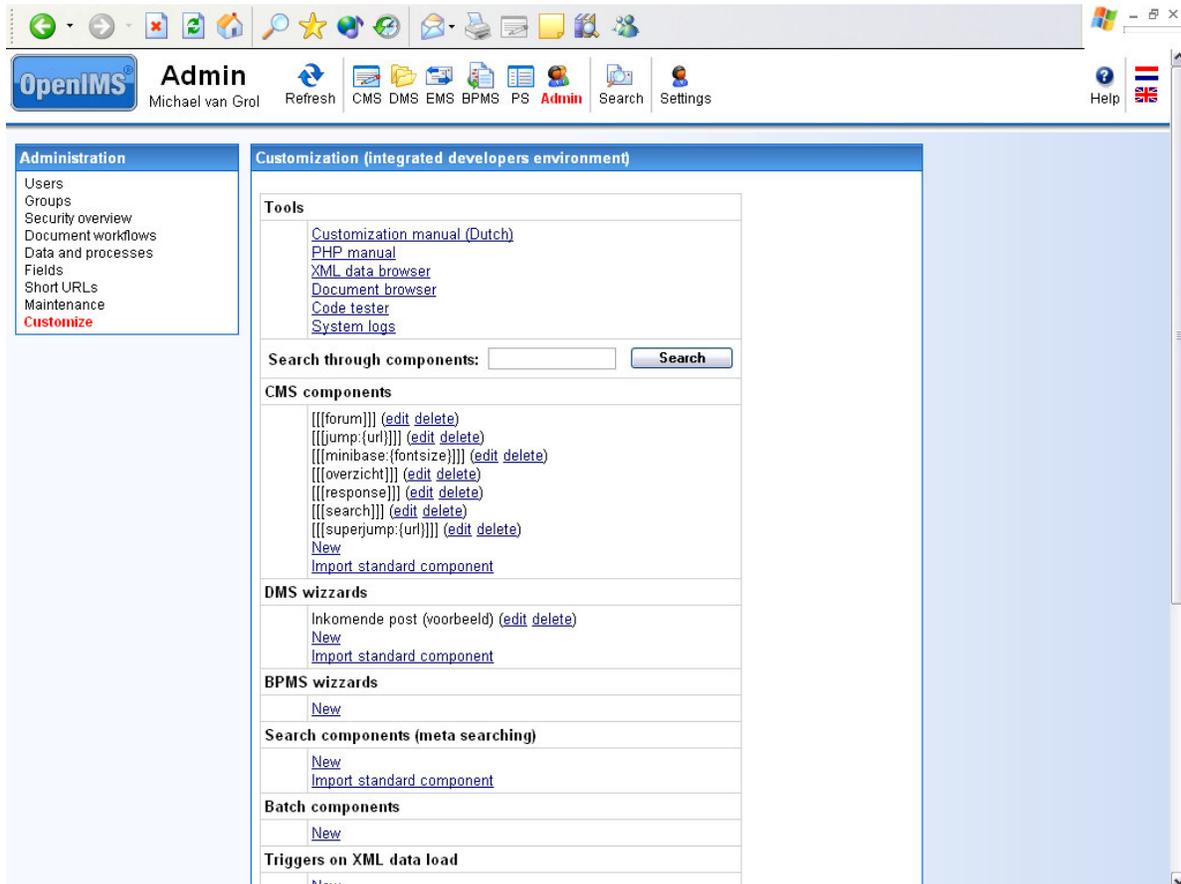
Open the Microsoft Visio drawing that you for example want to use as a template in the vsd format. Now you can create a text field via the Text Tool. In this text field you can place a tag, e.g. [[[version]]].

Note: You have to create separate text fields per tag. This is also applicable for the description of the value that is displayed. When you place everything in one single text field, only the value of the last tag will be shown.

The macro only refreshes the active worksheet.

11 Development (tailor made)

OpenIMS is a component based platform. But because every organization has its own special requirements, a special tailor made develop environment is available, called Flex. Here developers can create special components.

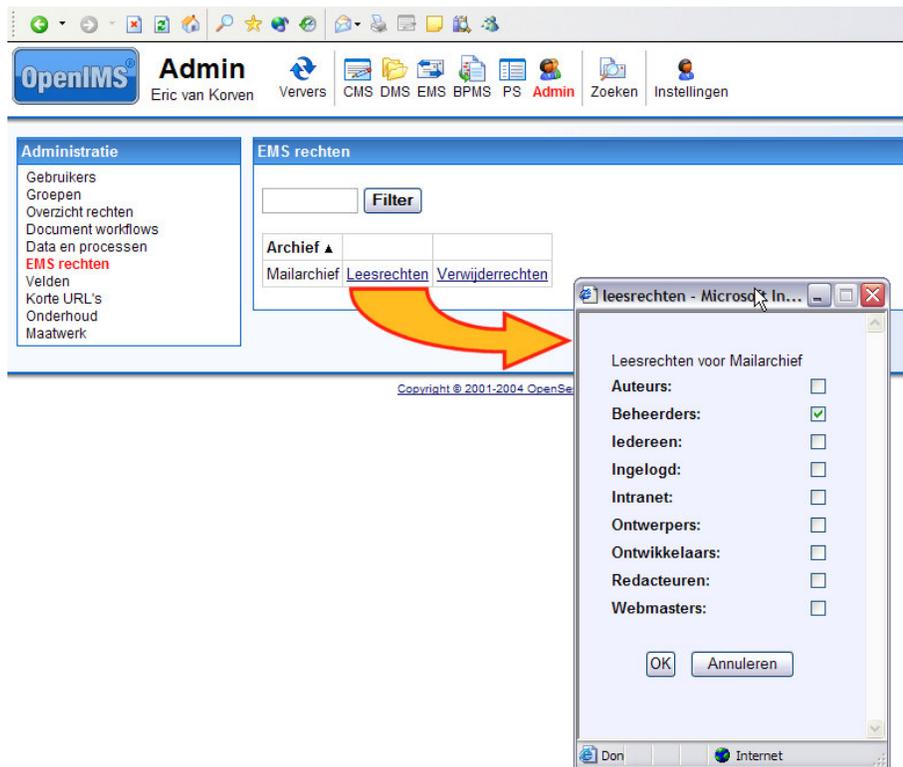


Go to: <http://doc.openims.com> for more information surrounding the tailor made environment of OpenIMS. Here a manual for programmers is also available.

12 EMS management

Within the E-mail Management environment (EMS) several e-mail archives can be managed. Each e-mail archive has its own unique e-mail address. Per archive it can be determined which user groups may search the archive (viewing rights) and which user groups may delete from the archive (delete rights).

The connection between different accounts takes place at the specific configuration file. The system manager can access the EMS through the OpenIMS Admin environment and sustain the various archives. See image below.



13 Data and processes (BPMS)

With BPMS data can be managed through web forms and processes. Behind the screens BPMS basically works with tables and records.

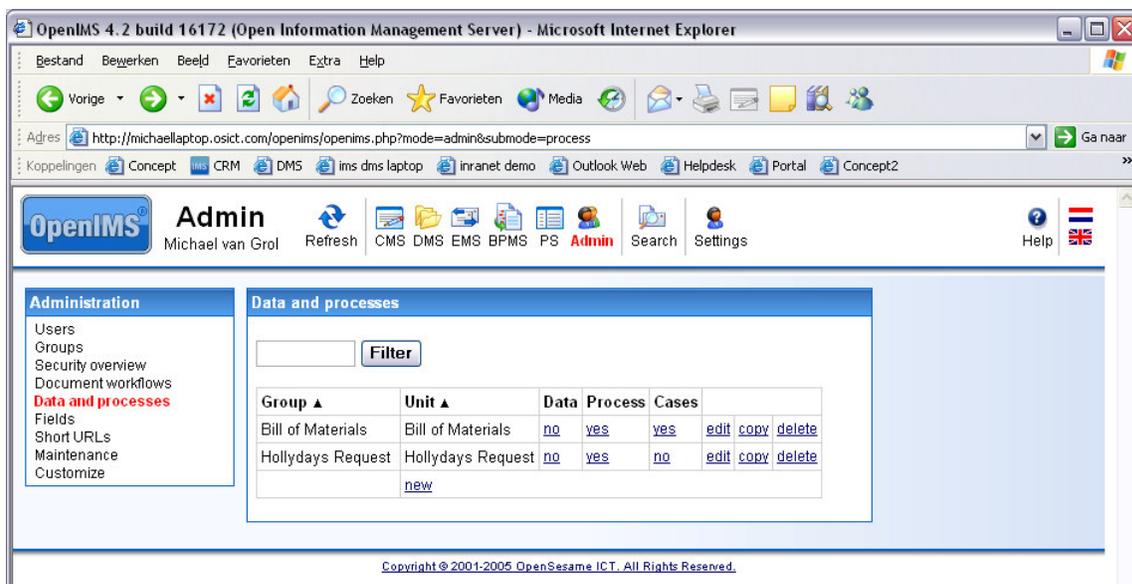
The tables may contain records with, for example, NAW data. Next to editing records, it is also possible to develop complete applications, for example CRM applications, EPDs, etc. Furthermore, company processes can be registered with the system, configured as form streams.

Example: an employee fills in a web form, requesting a day off. The department manager receives the form and approves the requested day off. Eventually the HR department processes the request and registers the day off.

To process the information, BPMS forms are necessary. These web forms determine the contents (data) of the process or table.

13.1 Overview

From the Admin environment you can select option “Data and processes”.



Via this screen you are able to see which processes are available; you can edit, copy (creating a new profile based on an existing process) or remove them. The “Group” classification gives you the possibility to group certain application data tables within the BPMS user interface.

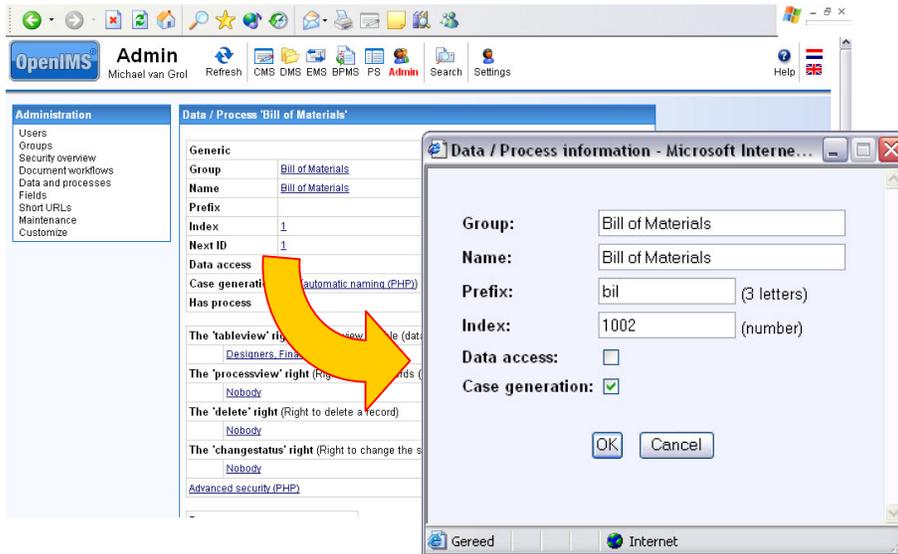
13.2 Properties of a data and process profile

A data and process profile can be divided into various components:

- General,
- Rights,
- Data access,
- Process construction,
- Process specification.

13.2.1 General

Group	Name of the complete application in case necessary (data management).
Name	Name of individual process / the data table.
Prefix	Unique precursor
Index	Number (current value), is adjustable.
Next ID	Combination of prefix and index which generates a unique number (record ID).
Data access	In case activated, the data table is accessible to authorized users.
Create file	You can create a file in DMS directly from the BPMS user interface, bases upon the record ID.
Has process	States if there is a process available, see paragraph 13.2.4.



13.2.2 Rights

Dataview	Viewing form data in a process.
Tableview	Viewing form data in a data table. If admissible, the user can view the table by selecting the option "Data", see paragraph 13.3.1
Procesview	Viewing all defined process.
Add	Adding a record to a data table.
Delete	Deleting a record.
Changestatus	Changing the process stage of a form; only accessible to administrators.
Advanced security (PHP)	Offers the possibility to deviate via php script of the existing security model.

You can add a user group(s) by selecting the hyperlink and subsequently selecting the specific user group(s) in the popup screen.

13.2.3 Data access

Title fields	These fields will be displayed through the BPMS user interface, when a user selects the option "Data" to go to a table. See paragraph 13.3.1
Form	Using this option, you can define which form has to be displayed to a certain user group.

It can be indicated per table, which fields must be displayed at record level within BPMS. See paragraph 13.3.1 for an example.

Table view with several users

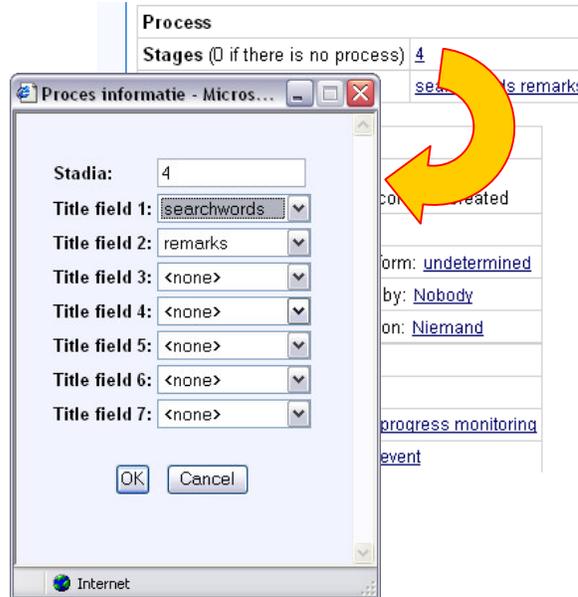
Within some applications certain user groups are not permitted to view or edit information from a form. Therefore it is possible to add several forms to a data table, with their own user groups with their own rights.

After choosing a form, the list with forms will expand. Per form you can determine which user group may use it.

Data toegang	
Titelvelden	naam
Formulier #1	'Intake gesprek Tafeltje-dek-je' (toon dit formulier)
	Dit formulier mag gebruikt worden door: Beheerders, Redacteurs
Formulier #2 word overwogen voor gebruikers die geen gebruik mogen maken van formulier #1	
Formulier #2	'Read only Tafeltje-dek-je' (toon dit formulier)
	Dit formulier mag gebruikt worden door: Auteurs

13.2.4 Process construction

Number of stages (0 if there is no process)	Defines how many stages a process consists of.
Title fields	These fields will be displayed if a BPMS user selects option "Processes" to view a process. See paragraph 13.3.2.



13.2.5 Process specification

A process stage can be a specific type. You can register different properties per type.

Nr #	BPMS Icon	Type
1		Decision
2		Form
3		End

Every process starts with filling out a form. This is always the first step in a process.

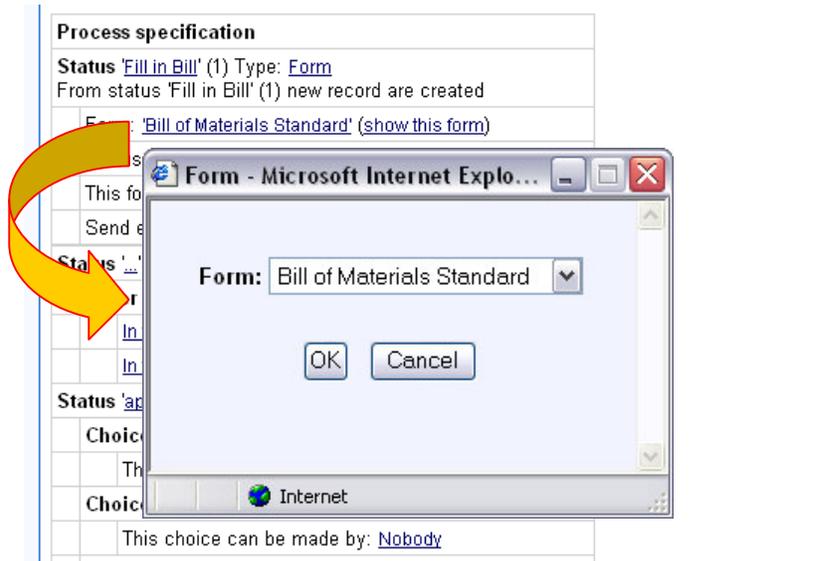
Type decision

If it is this type of stage, you can define which choices have to be made in this stage by which user groups. Every choice can lead to another free definable stage. If you a choice you can assign the form to another person.

Status 'approve bill' (3) Type: Decision
Choice 'Approve' results in " (4) delete choice
This choice can be made by: Nobody
Choice 'Disapprove' results in 'Fill in Bill' (1) delete choice
This choice can be made by: Nobody
Add choice
Other
In this stage there is no progress monitoring
In this stage there is no event

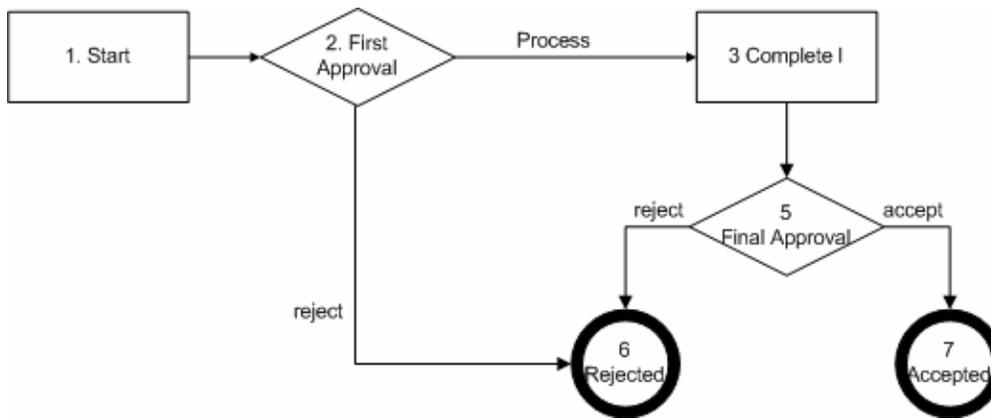
Type Form

A stage can only be left behind after the form that has been chosen here, has been filled out. You can determine who may fill out the form and to which stage it proceeds after it has been filled out. Every time the form has been filled out, a notification e-mail will be sent to a pre-selected address.



Type End

If a record has been placed in this stage, it can not leave it.



Example process with 6 stages:

The process above consists of 7 different stages:

1. Every process is activated by filling out a BPMS form (start); after filling it out, the form proceeds to the next stage, in this case: 2
2. First Approval; in the stage “First approval” you can decide if the form proceeds to stage “Complete” or “Rejected”. The stage “Rejected” is an end (6. Rejected) and it will finish the process.
3. In the stage “Complete” you need to check the basic information and complete it with additional information. After you have saved the form, it will be proceeded to the next stage; in this case: 5
4. Decision; with decision there are two options: “Accept” and “Reject”. Both options lead to an end: “Rejected”(6) and “Accepted”(7).

The way the process is recorded in the BPMS system is shown here:

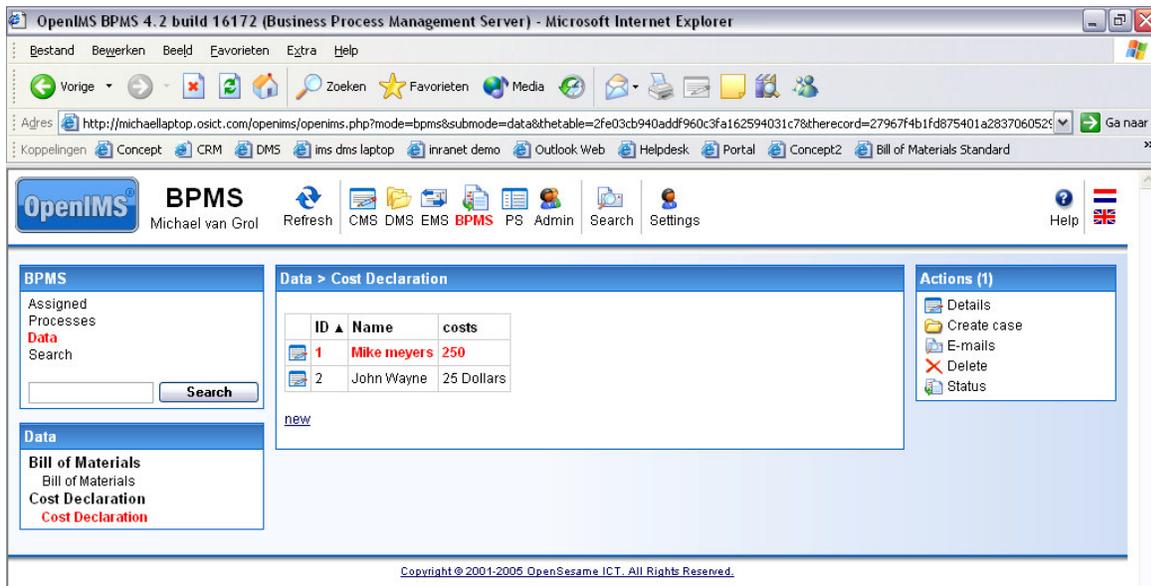
Process specification	
Status	'Start' (1) Type: Form
	From status 'Start' (1) new record are created
	Form: 'Bill of Materials Standard' (show this form)
	Status after filling out the form: 'First approval' (2)
	This form can be filled out by: Developers
	Send e-mail after completion: Niemand
Status	'First approval' (2) Type: Decision
	Choice 'Process Form' results in 'Change Bill' (3) delete choice
	This choice can be made by: Functional Managers
	Choice 'Dissapprove' results in 'Dissapproved' (5) delete choice
	This choice can be made by: Functional Managers
	Add choice
	Other
	In this stage there is no progress monitoring
	In this stage there is no event
Status	'Change Bill' (3) Type: Form
	Form: 'Bill of materials 2 manager' (show this form)
	Status after filling out the form: 'Final Approvement' (4)
	This form can be filled out by: Functional Managers
	Send e-mail after completion: Niemand
	Other
	In this stage there is no progress monitoring
	In this stage there is no event
Status	'Final Approvement' (4) Type: Decision
	Choice 'Approve' results in 'Approved' (6) delete choice
	This choice can be made by: Final Control
	Choice 'Dissapprove' results in 'Dissapproved' (5) delete choice
	This choice can be made by: Final Control
	Add choice
	Other
	In this stage there is no progress monitoring
	In this stage there is no event
Status	'Dissapproved' (5) Type: Endpoint
	Other
	In this stage there is no progress monitoring
	In this stage there is no event
Status	'Approved' (6) Type: Endpoint
	Other
	In this stage there is no progress monitoring
	In this stage there is no event

13.3 BPMS user interface

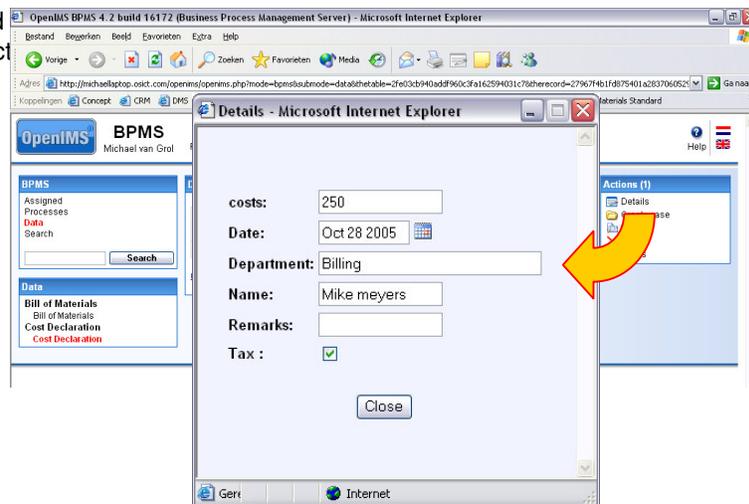
The BPMS is a frame work to develop web form applications that you make available to the end users. The next paragraphs will describe the BPMS user interface and will work as a basis for a BPMS based application manual. There is no specific BPMS user manual since every application or process stream will be tailor made.

13.3.1 Data management

On this screen you can view the tables you are authorized to. In this case the process as describes in paragraph 13.2.5 .

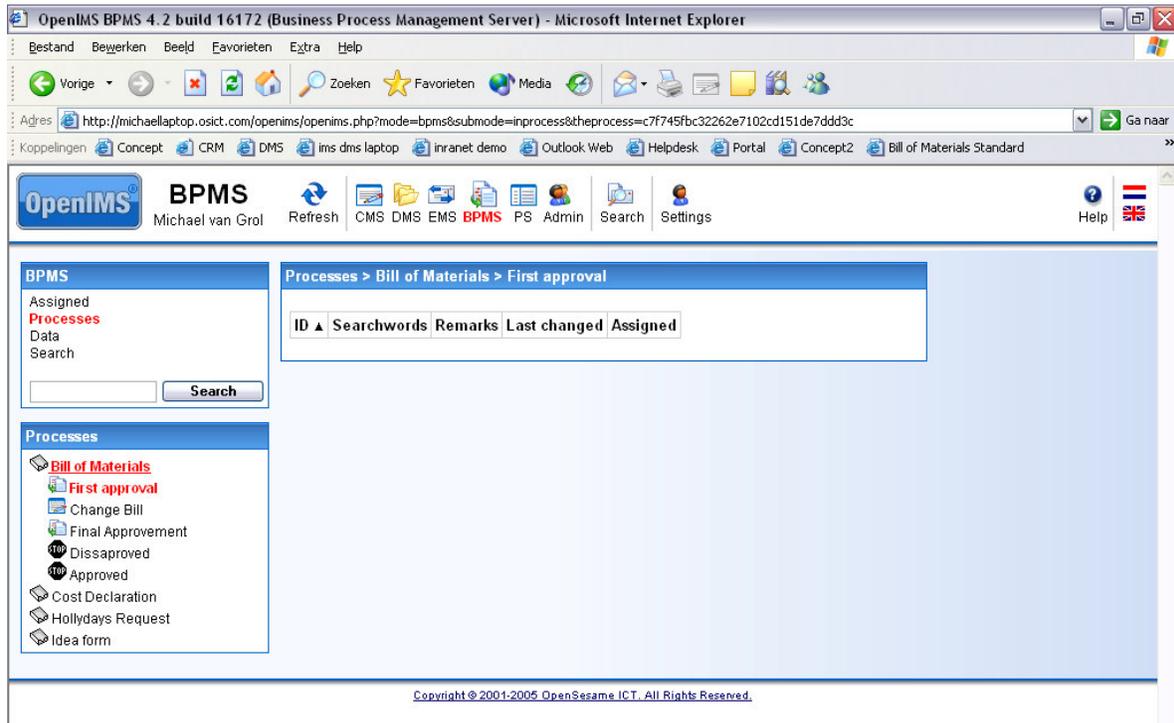


You can view the contents of a record selecting the option "Details" in the Act selected BPMS form.



13.3.2 Process management

The process that results in the next BPMS user interface is described in paragraph 13.2.5.



As you can see, there are several process stages returning here. In case there are more processes the user may access, they will be shown in the overview as well. The different types of stages result in different icons in a process.

	Process
	In this stage the user must make a choice.
	In this stage the user must fill out a form to start stage change.
	When a form reaches this stage, the process is at its end.

