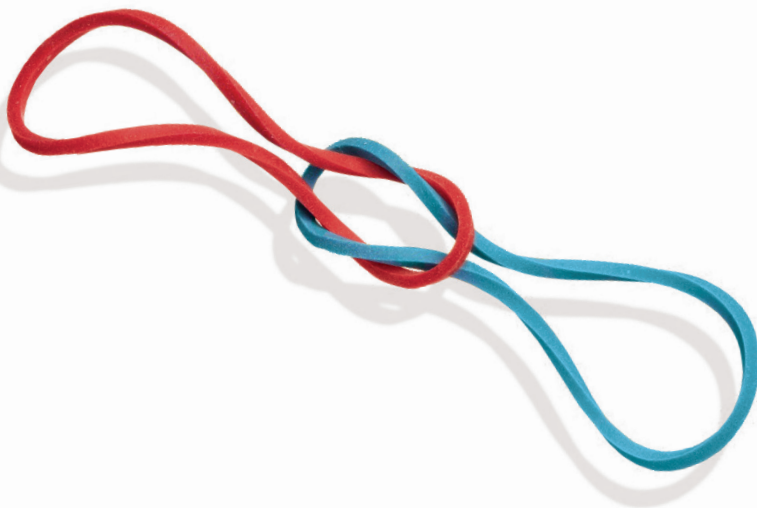


# Document Management Server

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## 2 PREFACE

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

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

An OpenIMS user must have a computer available with at least:

- A current browser; like Microsoft Edge, Apple Safari, Google Chrome or Mozilla Firefox;
- The applications you want to edit documents with must be available; such as, for example, Microsoft Word, Excel and PowerPoint, Adobe Reader, AutoCAD;
- The OpenIMS Transfer Agent (see <https://openims.com/downloads> for the latest version).

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### 3 LOGIN

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

To access OpenIMS, start your web browser and enter the URL of the domain under which OpenIMS is available. To access the document management portal, add the word **DMS** to the URL (for example, <http://intranet.yourcompany.nl/dms>). The OpenIMS login screen will then appear.



You can now enter the username and password you were given and then log in.

If a multi-factor solution is available, you can also enter the six-digit code and then log in. If you are not using a multi-factor solution, the **Extra** field will not be displayed on this screen.

## 4 DOCUMENT MANAGEMENT

OpenIMS offers extensive facilities for managing more than just documents. This includes images that need to be made available centrally, or documents that need to be offered for download. These include Microsoft Office files (Word, Excel, PowerPoint, Visio), AutoCAD drawings, Adobe Acrobat (pdf), and images (png, jpg, etc.).

### 4.1 The DMS-menu

The standard OpenIMS DMS opening screen consists of several sections. Using the options in the **DMS** menu, you can navigate to the following options:

**Generic** If available, a general folder tree with documents can be displayed from this viewpoint.

**Per case** From this viewpoint, you can zoom in on the file environment.

**Assigned** From this viewpoint, only the documents assigned to you are displayed.

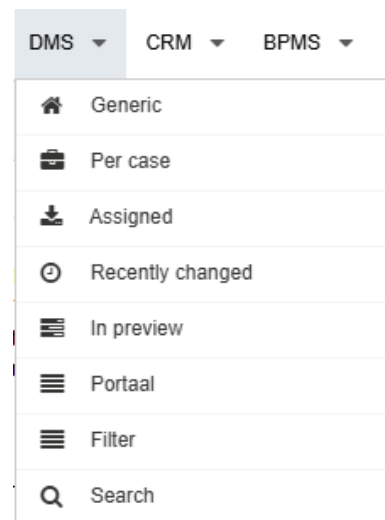
**Recently changed** From this viewpoint, the most recently modified documents are displayed in chronological order.

**In preview** From this viewpoint, the documents from the available workflow are displayed.

**Search** Search for documents in the DMS.

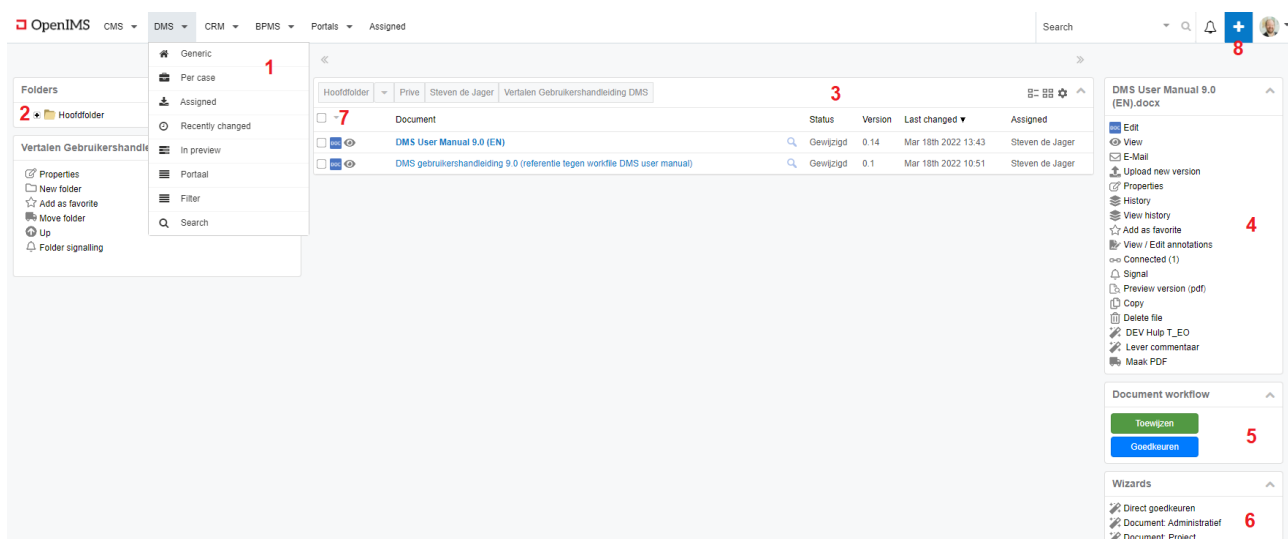
Note: In addition, customized components may be available for your organization, such as the **Portal** and **Filter** options in the image to the right.

The following sections explain the various viewpoints in more detail.



#### 4.1.1 General

By navigating to the **Generic** section via the **DMS menu (1)**, or to a case within the **Per case** or **Archive** sections, a folder and document overview is displayed as shown below.



The **Folder section (2)** allows you to navigate the entire folder structure within a specific case and works similarly to Windows Explorer. Clicking a plus sign expands or collapses a folder.

Under the **Folder section (2)**, you can use folder actions to manage the entire folder structure of the open case (provided you have the necessary permissions). It includes functionality for deleting, creating, and moving folders.

Clicking a folder displays the documents contained in that folder in the **Documents section (3)**. All available documents are displayed here. A particular folder may appear empty to one employee, while another employee finds documents in it. This is related to the authorization model (rights model).

If a specific document is selected in the **Documents section (3)**, the **Document action section (4)** displays the actions that can be performed on that document.

The **Document workflow section (5)** displays the follow-up actions, defined within the workflow, that can be performed for the selected document. These include actions such as approval, rejection, publishing, and so on.

The **Wizards section (6)** contains functionality specific to your organization. Using an assistant, several standard actions can be performed automatically.

The **Document selection section (7)** allows you to select several documents and then move, download, or create a report or snapshot from them.

The **New document section (8)** lists the available (document) templates for creating new documents. It also allows you to upload an existing document, for example, from your local computer.

#### 4.1.2 Per case

If your organization works with cases, you can use the **Per case** functionality. After selecting this menu option, you will be taken to an overview with the first 25 files (for example project files). You can browse through these.

Naam	Omschrijving
1	
1101	1101
2016.2232	Bram -
2019.0022	OpenIMS - CAOP
2019.0034	Eric van Korven - Meenwal 13
002222	Archief beheer in Zeeland
20663	Twan van Dijk - Huiskensstraat 72
677777	A van Deuveren - Hoornwaluw 12
2251143	Nieuw zwembad - In behandeling
4439393	Meerval vijver - Niet gestart
18102016	Eribel - Lommelstraat 1
20150043	het Weiland
20182911	A Huldy - Postbus 16115
201500065	Eric van Korven -

Depending on the setup, it is also possible to work with case categories as shown on the left. After selecting a category, the corresponding cases are displayed.

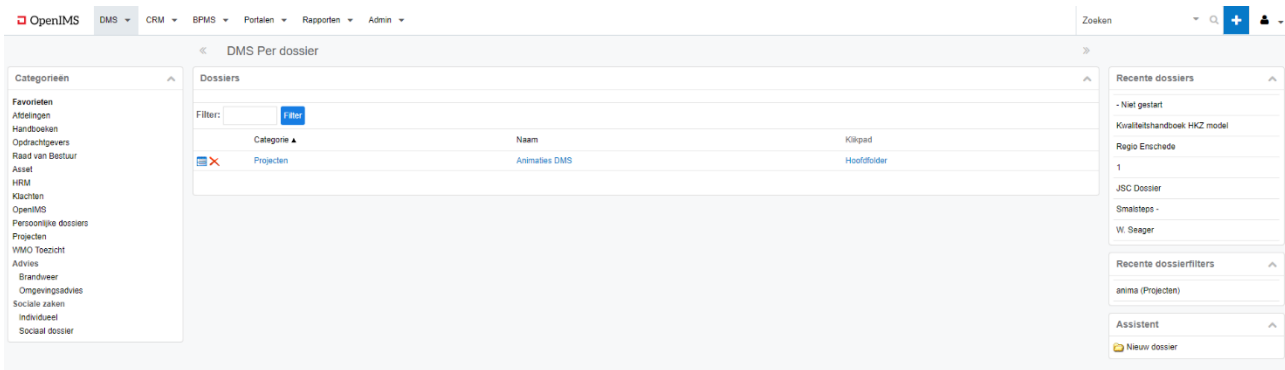
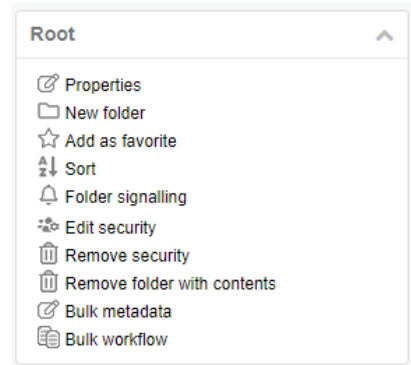
Depending on the permissions you have been granted, new cases can be added, deleted, or properties can be modified.

If more than 25 cases are available, you can find a case using a search function. Next to this, you will find an overview of the most recently opened cases and the most recently used filters.

### Favorites

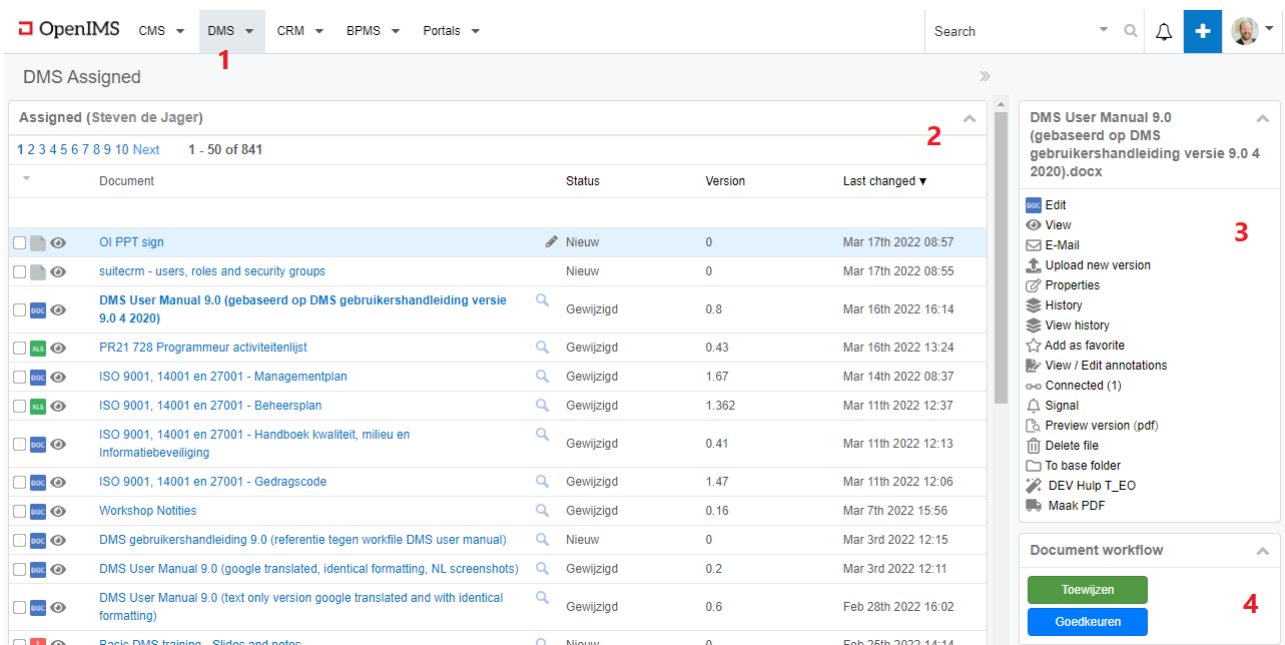
You can also mark specific cases as favorite. To mark a case as a favorite, click **Add as favorite** next to the case description (see image below). The selected case will then appear under the **Favorites category**, and these will always be shown first when you select **Per case**.

You can also mark a case as a favorite when it's open. You can mark a case as a favorite in the properties at the bottom left of the screen. If you need to remove a case from the favorites list, you can do so in the Favorites category overview. Click the red cross next to the case, and it will no longer appear on the favorites list.



### 4.1.3 Assigned

The mapped overview consists of four sections. These are the **Navigation section (1)**, the **Assigned Section (2)**, the **Document action section (3)** and the **Document workflow section (4)**.



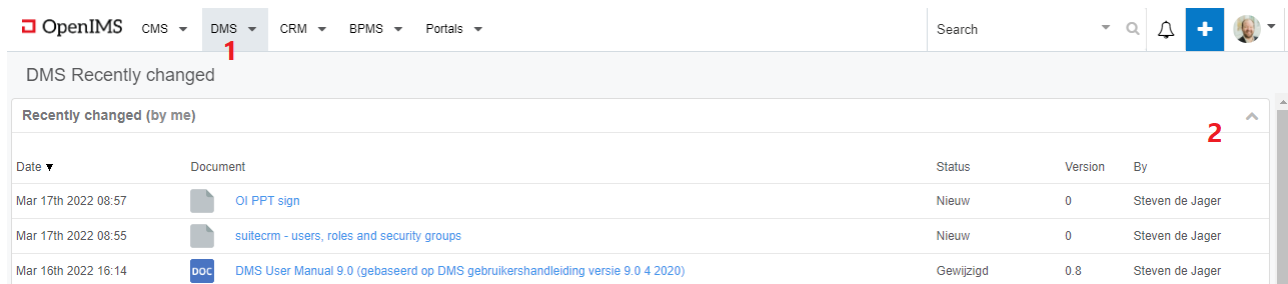
The **assigned section (2)** provides an overview of all documents, including status, that have been assigned to the relevant user.

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

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

#### 4.1.4 Recently changed

The recently changed overview consists of two sections. These are the **Navigation section (1)** and the **Recently changed section (2)**.



Date	Document	Status	Version	By
Mar 17th 2022 08:57	OI PPT sign	Nieuw	0	Steven de Jager
Mar 17th 2022 08:55	suitecrm - users, roles and security groups	Nieuw	0	Steven de Jager
Mar 16th 2022 16:14	DMS User Manual 9.0 (gebaseerd op DMS gebruikershandleiding versie 9.0 4 2020)	Gewijzigd	0.8	Steven de Jager

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

**Recently changed (by everyone)** by clicking on the text **by everyone** you can also see which 25 documents you have recently modified.

#### 4.1.5 In preview

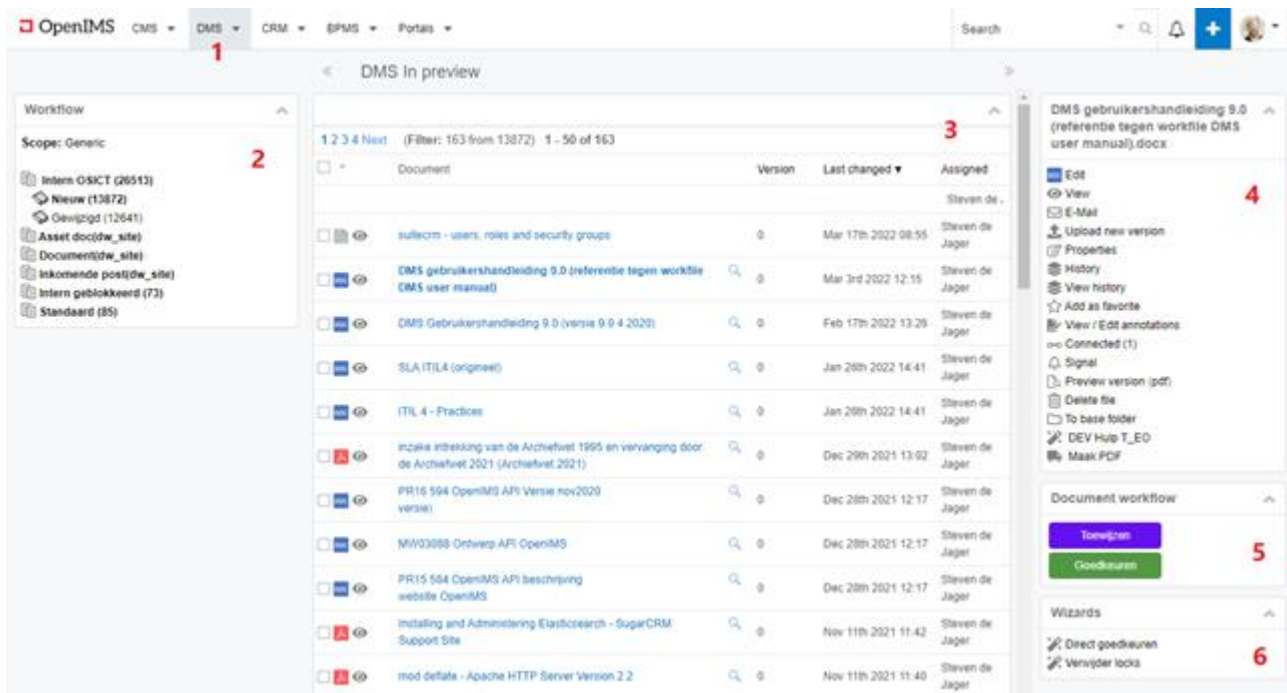
The **in preview** (see next page) overview consists of 6 sections. These are the **Navigation section (1)**, the **Workflow section (2)**, the **Documents section (3)**, the **Document action section (4)**, the **Document workflow section (5)** and **Wizards section (6)**.

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

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

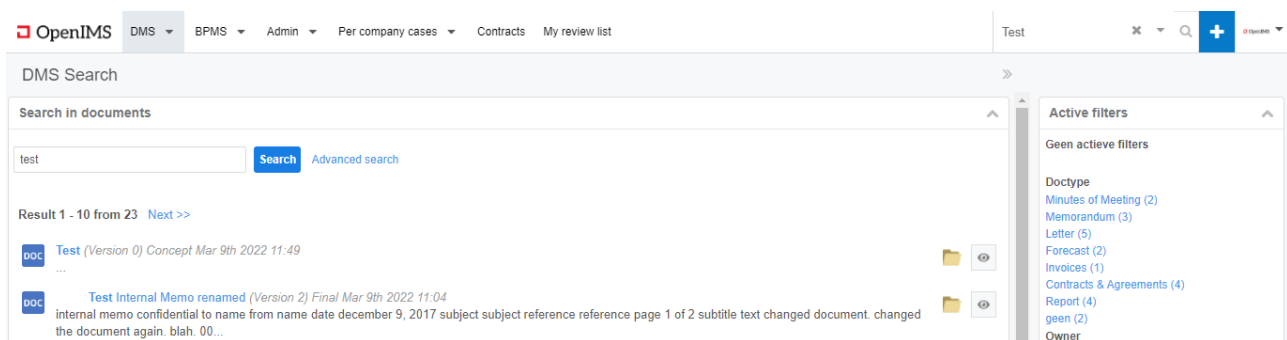
If a specific document is selected in the **documents section (3)**, the actions that can be performed on the relevant document are displayed in the **document action section (4)**.

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



#### 4.1.6 Search

Search allows you to search for specific documents. Searching is based on full-text and/or metadata.



The search engine searches through the content and meta information of the document. The moment a search term is found in the metadata, this will be weighted more, so that a document is placed higher in the results list.

#### View the document

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

#### Document location / edit document

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

#### View

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

#### Filter

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

## Advanced Search

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

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

The screenshot shows the 'DMS Search' interface. It features a search bar with the text 'test' and a dropdown menu set to 'in the document'. Below this are several filter options: 'with the terms' (with dropdowns for 'in the description' and 'anywhere'), 'with the phrase', 'without the terms', 'Doctype' (with a 'Select' button), 'search versions' (set to 'preview and published'), 'search index' (set to 'standard'), 'scope1' (with radio buttons for 'Everything', 'Generic', and 'Casetype:'), 'with workflow' (set to 'any'), 'with file format' (set to 'any format'), 'with date between' (with calendar icons and an 'and' connector), and 'sort by' (set to 'relevance and date'). A blue 'Search' button is located on the right side of the search bar.

## Multiple search indexes

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

## 4.2 Navigating in OpenIMS

Within the DMS, the **click path (1)** shows exactly which path was followed to reach a specific document. It is possible to go back several levels using the click path.

The screenshot shows the OpenIMS DMS interface. At the top, there are navigation tabs for 'CMS', 'DMS', 'BPMS', and 'Admin'. A search bar is located on the right. The main content area is titled 'Bouwplan Amersfoort-Noord (de Bron) case'. Below this, there is a breadcrumb navigation path: '(nieuw)Bouwprojecten > Dossier templates > 1. Ingekomen'. A red '1' is placed above the '1. Ingekomen' breadcrumb. On the left, there is a tree view showing the folder structure: 'Bouwplan Amersfoort-Noord (de Bron) case' > 'Dossier templates' > '1. Ingekomen' > '2. Uitgaand' > '3. Startdocumenten' > '4. Projectplannen'. The main area displays a table of documents:

Document	Status	Version	Last changed	Assigned
<input type="checkbox"/> 20161206 Regionaal Archief Help Betuwse voorouders online vindbaar	Afgehandeld	1	Mar 4th 2020 14:26	Eric van Korven
<input type="checkbox"/> 20161205 BIM dossier FW Business Software Event 2016	In behandeling	0	Mar 4th 2020 14:25	Eric van Korven

On the right side, there are action buttons for 'Edit', 'View', 'E-Mail', and 'Upload new version'.

## 4.3 Folders within OpenIMS

The DMS offers various options for customizing folders and documents.

On the left side of the DMS, you'll find options under the folders frame. These options apply to the folder selected above it in the folder tree. Depending on your permissions, certain options may or may not be displayed.

The following folder options are available:

**Properties** You can change a number of properties such as name and description of a folder. In addition to the description and title, the workflow and metadata are also recorded here.

**New folder** Here you can create a new (sub) folder, when clicked a dialog opens where you can enter the name of the folder. After clicking **OK** the folder will be created as a sub-folder of the folder you are currently in.

**Add as favorite** Here you can add a folder as a favorite. The relevant case is added to your personal favorites (Via DMS | Per case).

**Move folder** If a document or folder is found to be incorrectly located within the DMS, you can move it here. Clicking on it will prompt you to select a folder (or the main folder) in the next window to move the selected folder. After clicking **OK**, the folder will be moved.

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

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

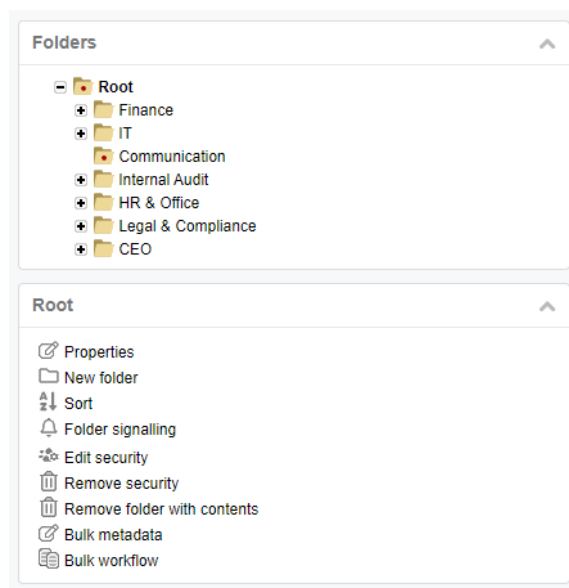
**Local Security** If you have sufficient permissions, this option will appear to enable local security for folders. This functionality protects the folder or documents from select users. Clicking this button will open a dialog box where you can enable local security as indicated by a red dot on the folder.

**Edit security** After enabling **Local Security**, the option will change to **Edit Security**. This allows you to adjust the security of the folder per user and/or group.

**Folder signalling** This allows you to subscribe to folders. This means you'll receive an email notification when changes are made to the folder or documents.

**Remove folders** If you have sufficient permissions, folders can be deleted. A folder must not contain any subfolders or documents to be deleted.

Note: As an administrator, you do have the right to delete a folder, including its subfolders and contents.



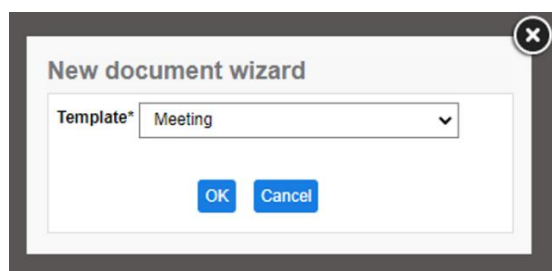
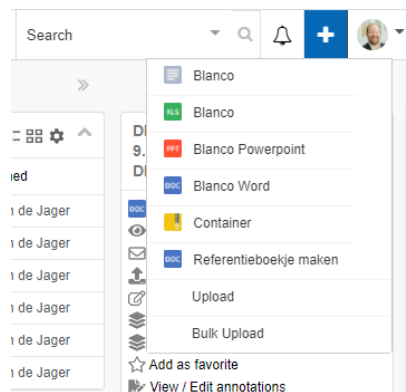
## 4.4 Working with (new) documents

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

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

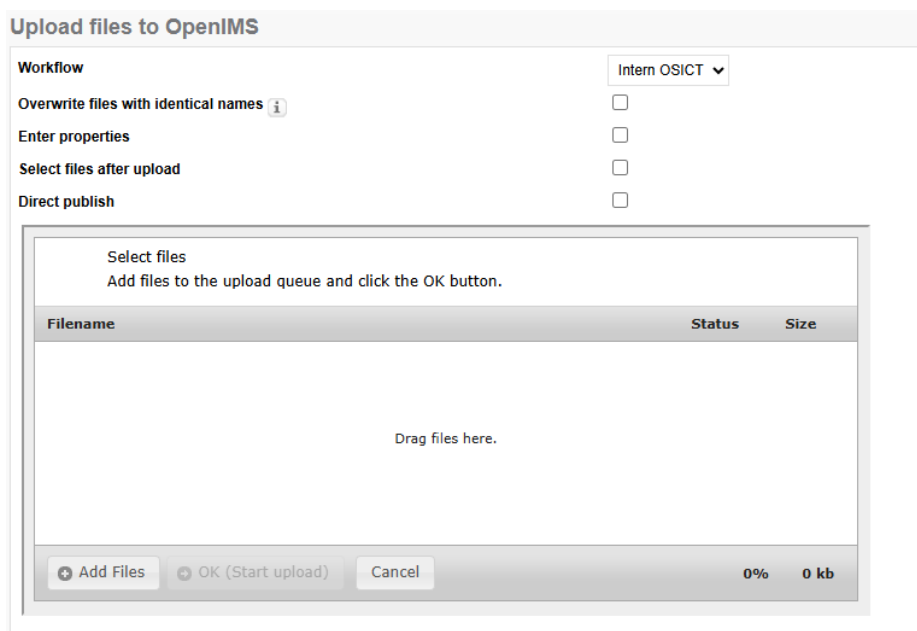
In the top right corner of the DMS, you'll find standard document templates, if provided by your organization, and the option to upload documents to the current folder. The **Upload** option is available by default. This allows you to upload new files to the DMS. The files are placed in the active folder.

In addition to adding new documents to OpenIMS DMS based on document templates, any existing document can be uploaded to the system. This is discussed in more detail in section 4.4.1.



### 4.4.1 Uploading documents

To upload a document, navigate to the **new document section** and click the **Upload** function. Then, select the document or file to be placed in the DMS or drag it into the upload window (see image below). Clicking the **OK (Upload)** button will place the documents in the DMS. The name of the document in the DMS is derived from the file name of the uploaded file. The upload facility can be invoked in any folder, after which the document will be saved there. OpenIMS offers both a simple and an advanced upload facility.



The previous image shows the advanced upload screen. In this screen, the following items can be checked:

**Workflow** Select from a list of available workflows.

**Overwrite files with identical names** Option to overwrite documents with the same name in the DMS. Note: Existing files retain their workflow and properties.

**Select files after upload** All documents are selected in the DMS after uploading.

**Direct publish** All documents are immediately finalized after uploading.

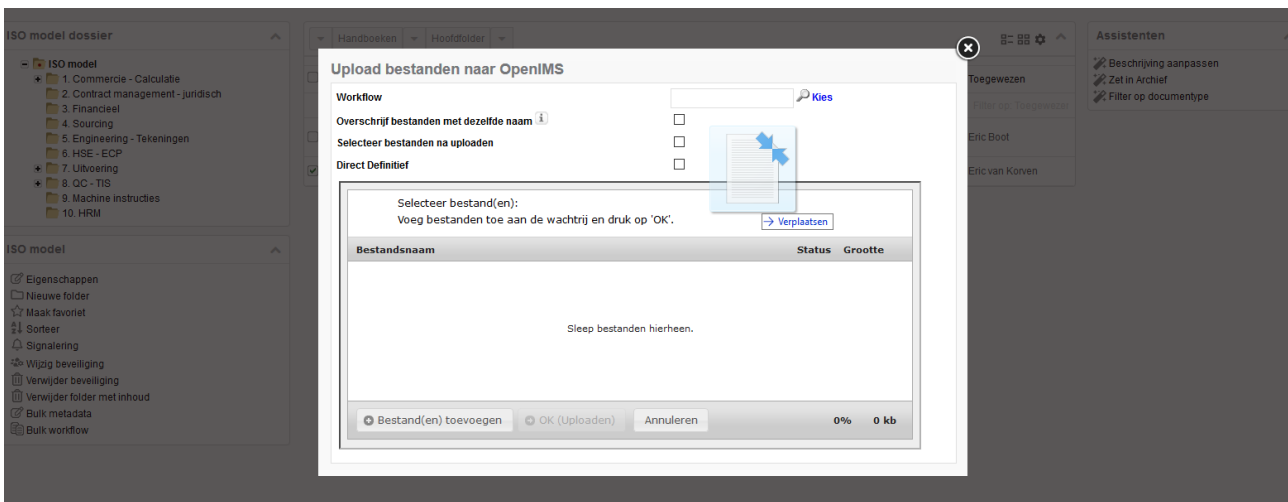
**Add Files** Add files from the local computer or network folders.

**OK (Start Upload)** Upload the displayed documents to the DMS.

**Cancel** Return to the DMS without performing an upload.

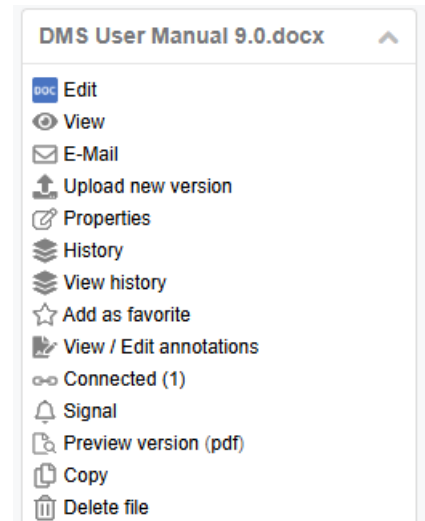
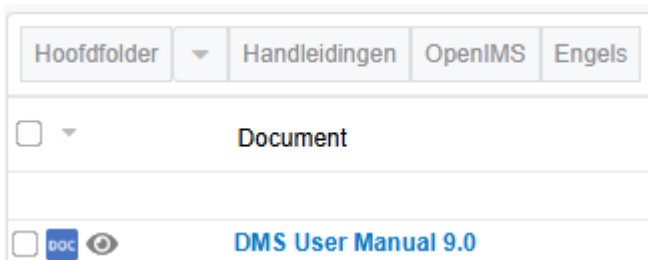
#### 4.4.2 Drag and drop

You can also drag documents directly into the DMS without first selecting the **Upload** function. When you drop the file or files, either from your workspace (Windows Explorer) or from Outlook (email or attachment), the upload screen shown above will automatically appear. After the upload screen opens, you can drop files into the box labeled **Drag files here**.



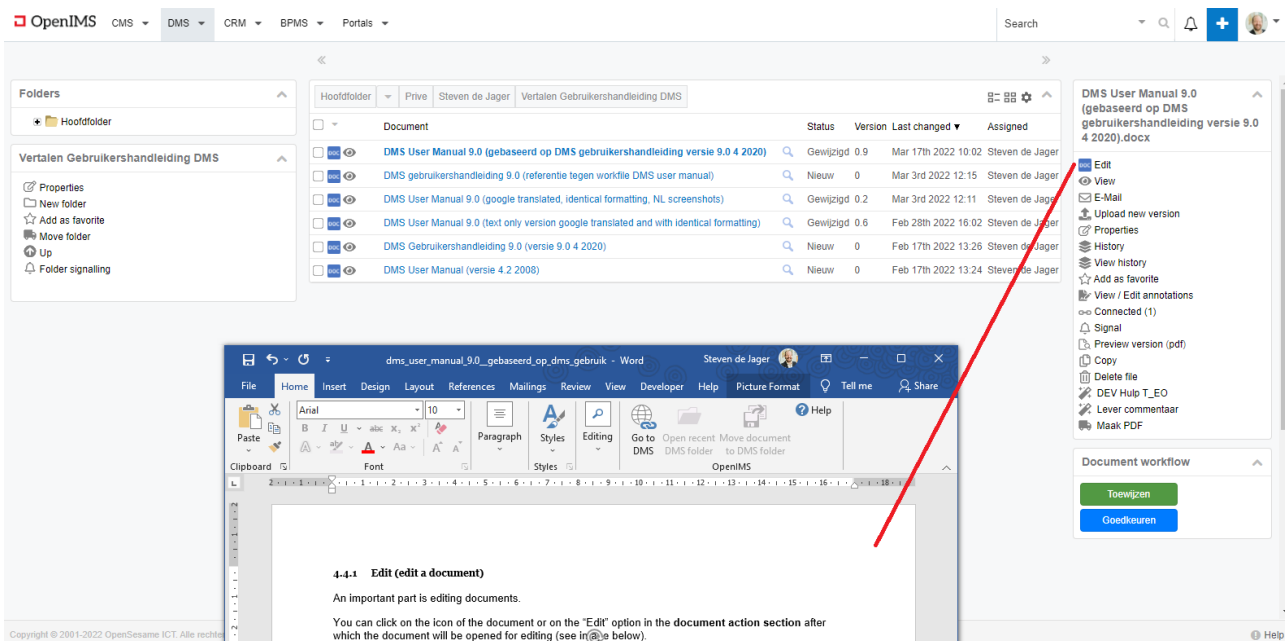
## 4.5 Document actions

On the right side of the DMS, you'll find options when a document is clicked by its name. These options apply to the selected document. The following chapters provide an explanation or explanation of each option's functionality.



### 4.5.1 Edit

An important part is editing documents. This option opens the latest version of the document for editing.



When you have finished editing a document, in this case a Microsoft Word document, close the document completely, including the Microsoft Word application itself. If you have changed the contents of the document, Word will ask if you want to save the changes when closing, when selecting **Yes** or **Save** the OpenIMS Transfer Agent ensures that the changed document is transferred to OpenIMS DMS.

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

### 4.5.2 View

This option opens the latest version of the document in read-only mode.

### 4.5.3 E-mail

Sends an email message containing a hyperlink to the document. These days, hundreds of documents are sent as attachments within organizations every day. This results in mailboxes filling up and outdated documents remaining in circulation.

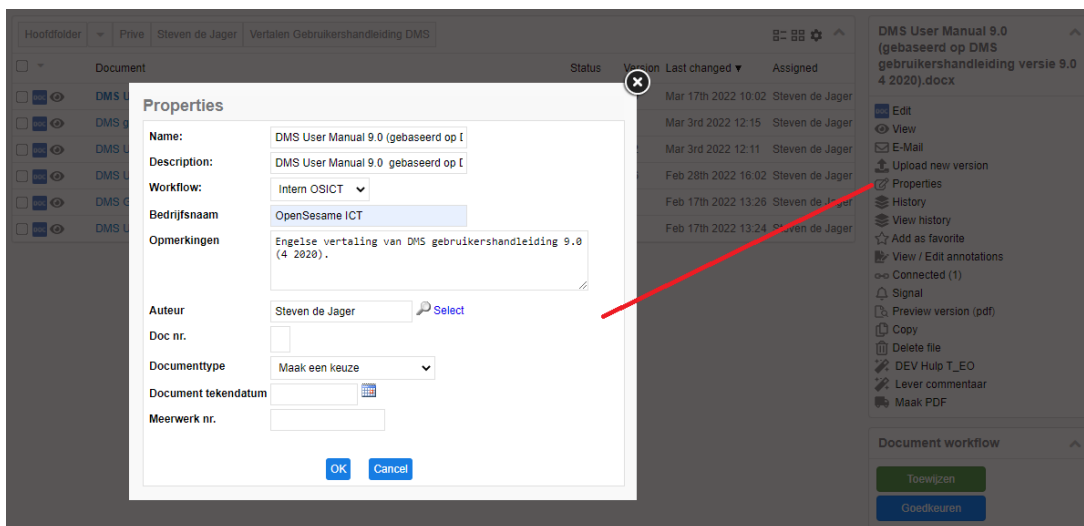
By sending the link to the document in the DMS instead of the document itself, everyone always has access to the latest published version of the document without actually sending the document.

### 4.5.4 Upload new version

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




### 4.5.5 Properties

This allows you to view and edit document properties. In addition to the description and title, the workflow and metadata are also recorded here. The document properties screen has several standard metadata fields (Name, Description, and Workflow), and organization-specific metadata can be maintained. This metadata is determined by the workflow of the document in question and is recorded by the administrator of the DMS.



### 4.5.6 History

The historical overview displays all versions in chronological order. It shows who changed the document and when. You can also view the content of the changes. It's essentially a log of the document.

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

OpenIMS		DMS	BPMS	Portals	Search	🔔	+	👤
<b>History</b>								
History of document "Employment contract"								< Back ^
								Compare
Changed by Steven de Jager (Fr, Sep 22nd 2023 11:21)						👁️ 📄 📄	Version 1.2	
Changed by Steven de Jager (Fr, Sep 22nd 2023 10:43)						👁️ 📄 📄	Version 1.1	
Choice "Goedkeuren" by Steven de Jager (Tu, Jul 11th 2023 10:11)								
Properties changed by Steven de Jager (Tu, Jul 11th 2023 10:06)								
Field	Old	New						
Name	Testbestand D	Employment contract						
Created by Steven de Jager (Tu, Jul 11th 2023 10:05)						👁️ 📄 📄	Version 1	

### View changes between versions

By selecting two versions using the checkboxes and then selecting the **Compare** button, you can view the differences between the two versions.

Compare documents	
Compare "Employment contract" < Back ^	
Version by Steven de Jager - Tu, Jul 11th 2023 10:05 - Version 1	
From: "Testbestand"	
To: "Employment contract OpenIMS K. Karelse Richterslaan 2 Nieuwegein"	

#### 4.5.7 View history

The reading history shows the date, time and user. It shows who opened the document and when.

#### 4.5.8 Add as favorite

This allows you to add a document to your favorites.

#### 4.5.9 View / Edit annotations

With annotations you are able to see, edit and add annotations to a separate view of the document.

#### 4.5.10 Signal (subscription)

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

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

#### **4.5.11 Preview / Published version**

The **published hyperlink** always points to the latest published version (not necessarily the final version) of a document. The **concept hyperlink**, however, points to the latest (edited) version of a document.

This feature provides a secure hyperlink (URL) to the document. Each version of a document has a unique hyperlink. This hyperlink remains unchanged throughout the document's lifespan.

The hyperlink can be used for many purposes. Consider sending it by email (instead of the physical document) or using it to link to a document from a CRM system. The link can also be used, for example, to link from an intranet to a document in the DMS.

#### **4.5.12 Revoke**

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

#### **4.5.13 Copying documents**

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

#### **4.5.14 Delete documents**

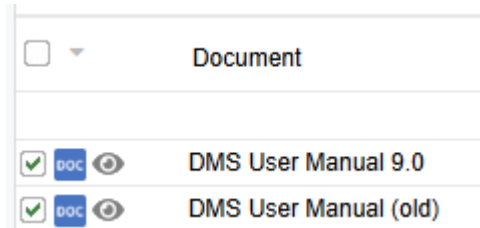
Using this function, you can (provided you have the required rights) delete a document from the DMS.

#### **4.5.15 Create PDF**

Indien beschikbaar kan overeenkomstig een pdf-variant van het document worden gemaakt.

## 4.6 Select documents menu

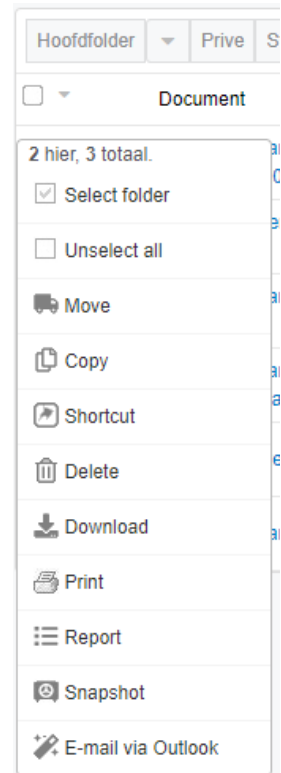
Selection options are located in the menu above the displayed documents in the DMS. These options appear in the menu when one or more documents are selected. The options apply to the selected documents.



Each document can be selected within OpenIMS by checking the box in front of a document. The image above shows two selected documents. It's also possible to select documents from other folders. In this case, two document from the current folder and one from another folder are selected.

In addition, the menu allows you to select certain options, such as **Select files from folder and subfolders**. This selects all documents within the current folder and/or subfolders.

The title bar of the selection menu displays the total number of selected documents. The **Unselect all** menu option reverses the action, deselecting the entire selection.

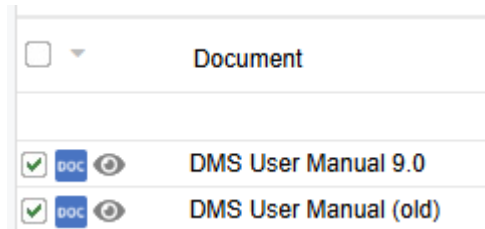


### 4.6.1 Move to here

There are two ways to move documents to another folder: **move here** or **move to folder**. In regard to both methods, the documents to be moved must first be selected. Using **Move to here** the selected documents can be moved to the current folder.

Before the move function is available, you must first check the box for the document(s) you want to select. Then navigate to the folder to which the document should be moved. Then click on the **move to here** menu option.

A window will then appear (picture on the right) in which you must confirm moving your selection by filling in **yes** at the drop-down menu and clicking **OK**. The document(s) will be moved to the appropriate folder.



**Move selected files to current folder**

Selected files: Move

Document	Status	Version	Date last changed	Assigned
Hoofdfolder > Handleidingen > OpenIMS > Engels >				
<input checked="" type="checkbox"/> DMS User Manual (old)	Gepubliceerd	3	Apr 11th 2022 22:13	Wieger Kunst (Inactief)
<input checked="" type="checkbox"/> DMS User Manual 9.0.docx	Gewijzigd	0.23	Feb 17th 2026 16:50	Steven de Jager

Are you sure?

Remember selection

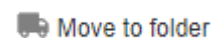
Remark

### 4.6.2 Move to folder

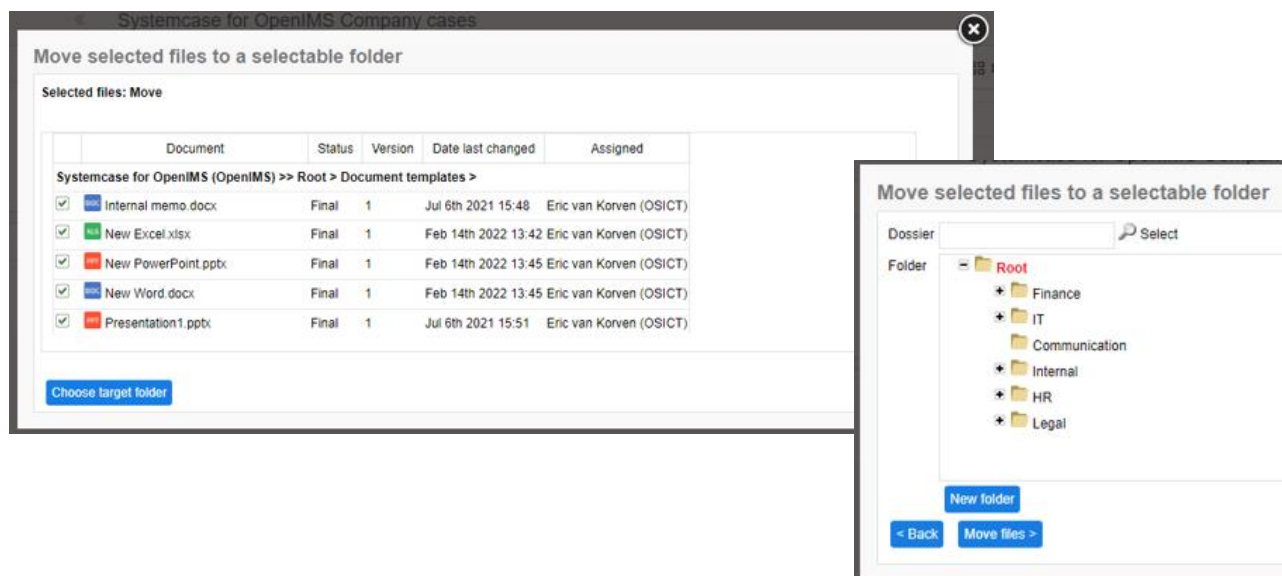
Using this option selected documents can be moved to a folder of your choosing.

Processchema VISIO Ter controle / autorisatie 4.1 1 Sep 2015 10:41 Bas Jansen

Before the move function is available, you must first check the box for the documents. Then click on the **Move to folder** menu option.



A combo box will then appear. By clicking on **Choose destination folder** you can select the destination folder. Then click on **Move**.



### 4.6.3 Copy

The Copy function allows you to copy selected documents and move them to another folder. To do this, first select the documents to be copied. Then, navigate to the folder where the selected documents will be placed and select the **Copy** menu option.

The system will then display a list of all selected documents and ask for confirmation. You can confirm this by select **Yes** at the **Are you sure?** question and then clicking **OK**. OpenIMS will now move all files to this folder. It is also possible to copy files within the same folder.

### 4.6.4 Shortcut

The shortcut function allows you to create a link to a file in a location other than the file's actual location. To do this, first select the documents you want to create a shortcut for. Then, navigate to the folder where you want to place the shortcuts, and click the **Shortcut** menu option.

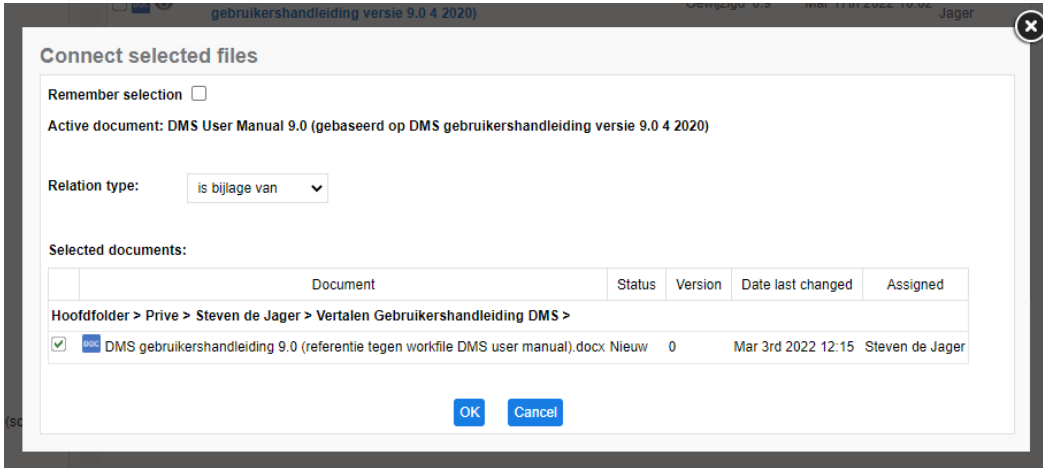
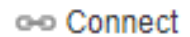
The system will then display a list of all selected documents and ask for confirmation of the shortcut creation action. You can confirm this by selecting **Yes** at the **Are you sure?** question and then clicking **OK**. OpenIMS will now create the shortcuts in this folder.

The documents remain in their original location. Shortcuts can be identified by the document icons, which, like in Microsoft Windows, include an arrow (for Microsoft Word, for Adobe PDF, etc.).

#### 4.6.5 Connect

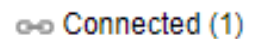
If configured, it is possible to display relationships between documents. You click on a document, the **active** document, and then check one or more documents.

By clicking on the **Connect** menu option, the screen appears in which you can choose the relationship between the **active document** and **selected documents**.



The relationships shown in the image (**is attachment of, has as attachments, etc.**) are illustrative. These relations must be configured in the system configuration.

When the relations are created, the connect icon is visible in the document action section.



When clicking the connect icon, an overview appears with all relations to and from the selected document. For example, to remove a document relation, the document needs to be highlighted and in the document menu there needs to be clicked on the **Connected** menu option. The related document(s) will then be displayed.

#### Linked documents

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

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

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

The following actions are available:

	View - View the document in view mode
	To base folder - Navigate directly to the folder containing this document
	Follow link - Navigate to the linked document
	Remove link - Remove the link / relationship

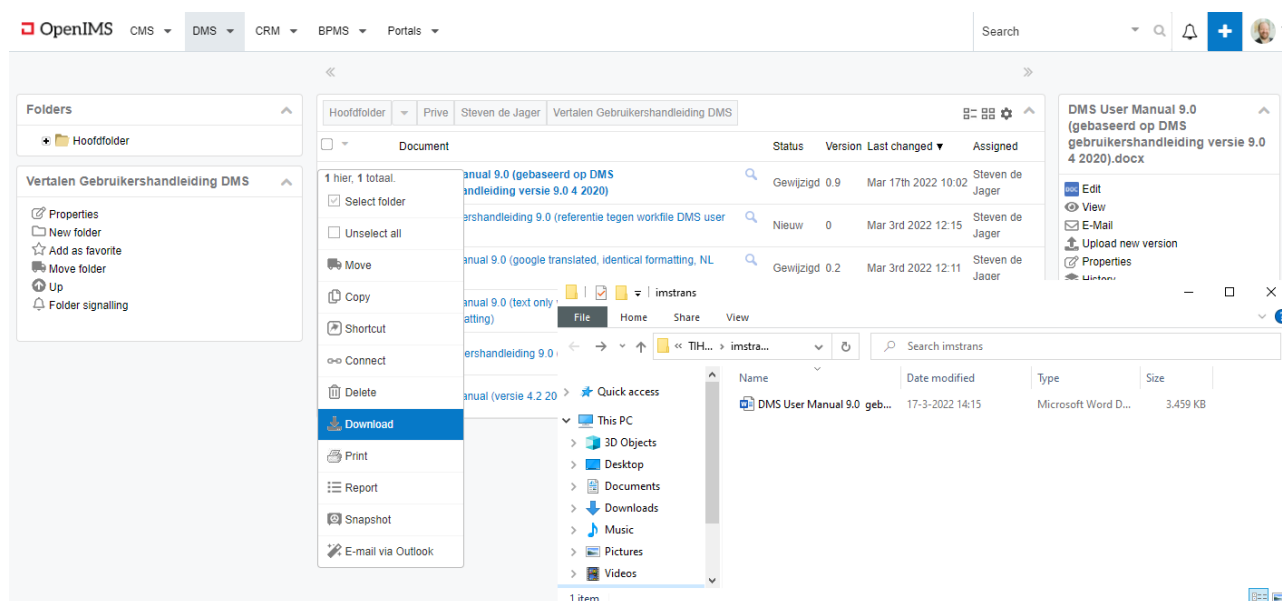
#### 4.6.6 Delete

The Delete function allows you to delete multiple documents simultaneously. To do this, first select the documents and then click the **Delete** menu option.

The system will then display a list of all selected documents and ask for confirmation of the deletion. You can confirm this by selecting **Yes** in the **Are you sure?** box and then clicking **OK**. OpenIMS will then delete the selected files.

#### 4.6.7 Download

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



#### 4.6.8 Print (optional)

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

#### 4.6.9 Reports

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

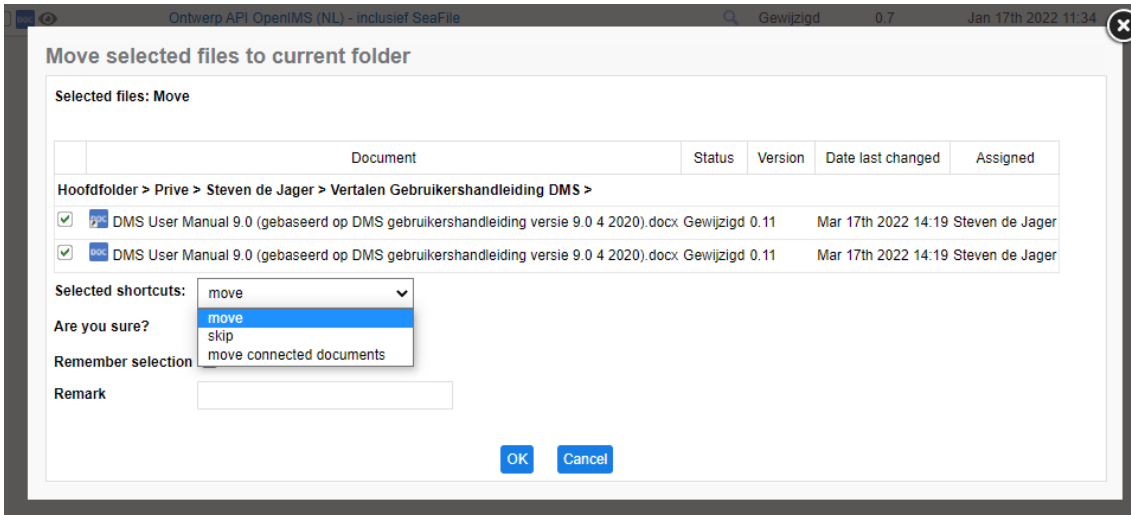
#### 4.6.10 Snapshots

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

#### 4.6.11 Move, copy and delete shortcuts

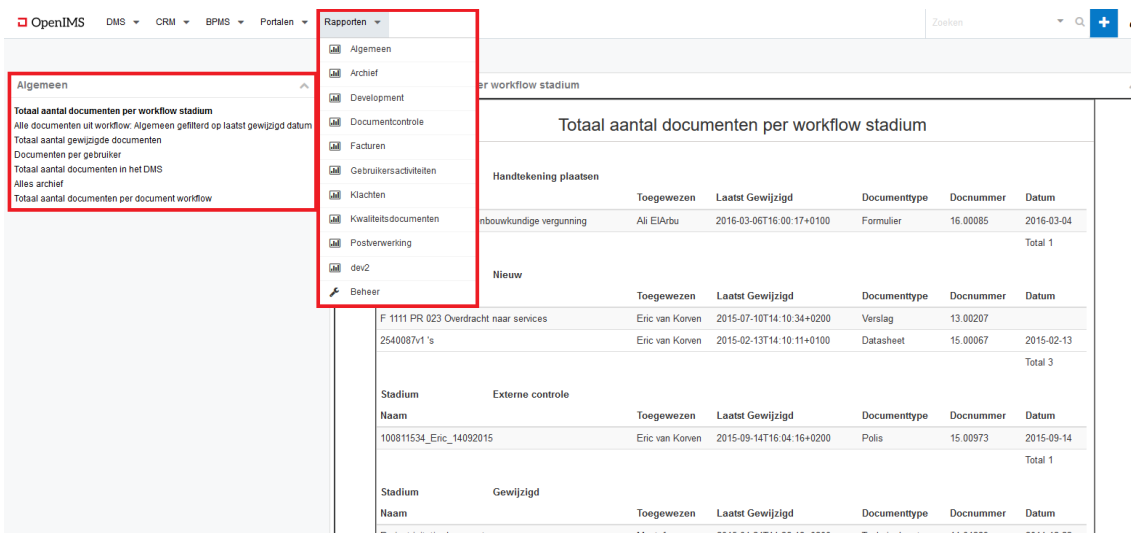
If you perform the move, copy, and/or delete operations on a number of selected documents of which one or more shortcuts are included, the system will ask in the overview screen what should be done with these shortcuts.

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



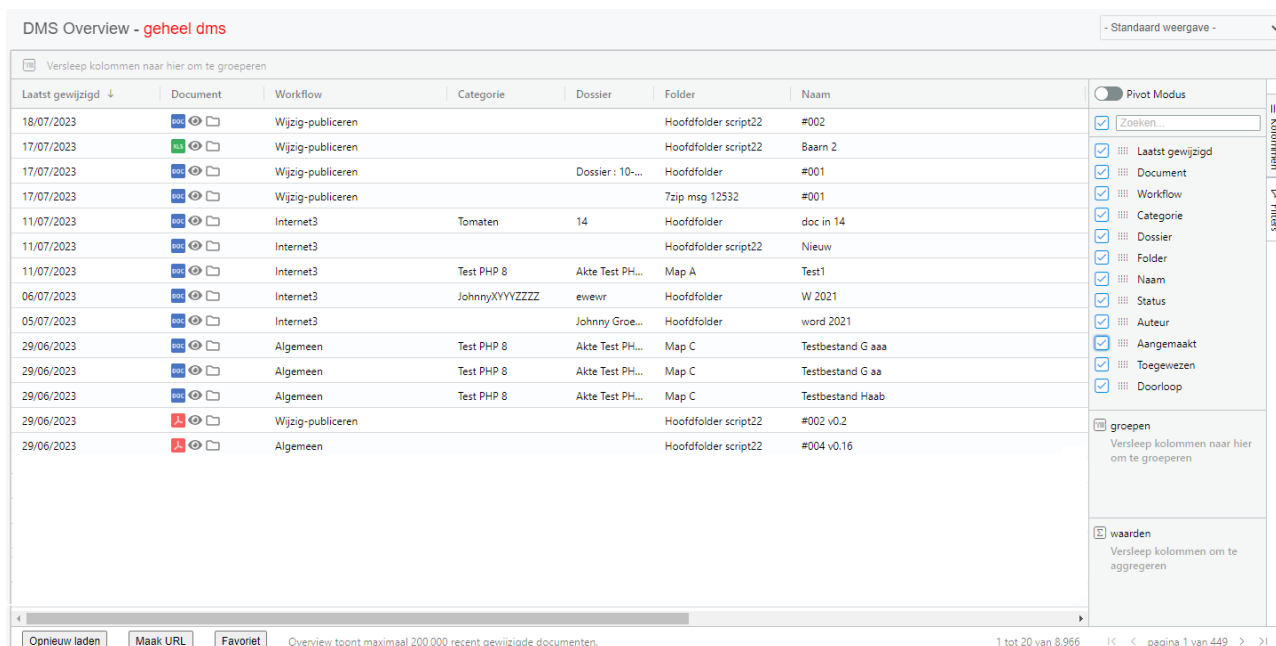
## 4.7 Reports

If reports are enabled, you can use the reporting function. The **Reports** button in the menu bar allows you to access and manage the reporting function. The pulldown menu defines several categories for which reports can be requested. Opening a category displays the available reports. Clicking on it displays the report in the same screen.



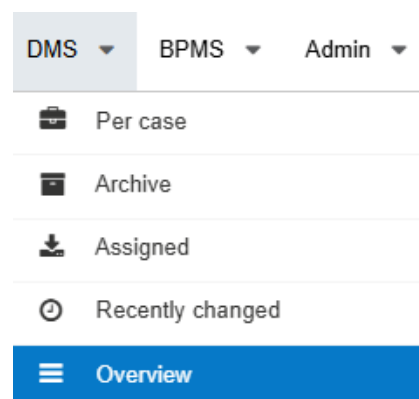
## 4.8 Overview

Overview provides insight into the properties (metadata) of documents present in the entire DMS, defined by case category or a customized collection of documents.



Laatst gewijzigd ↓	Document	Workflow	Categorie	Dossier	Folder	Naam	Pivot Modus
18/07/2023		Wijzig-publiceren			Hoofdfolder script22	#002	<input checked="" type="checkbox"/>
17/07/2023		Wijzig-publiceren			Hoofdfolder script22	Baarn 2	<input checked="" type="checkbox"/>
17/07/2023		Wijzig-publiceren		Dossier: 10-...	Hoofdfolder	#001	<input checked="" type="checkbox"/>
17/07/2023		Wijzig-publiceren			7zip msg 12532	#001	<input checked="" type="checkbox"/>
11/07/2023		Internet3	Tomaten	14	Hoofdfolder	doc in 14	<input checked="" type="checkbox"/>
11/07/2023		Internet3			Hoofdfolder script22	Nieuw	<input checked="" type="checkbox"/>
11/07/2023		Internet3	Test PHP 8	Akte Test PH...	Map A	Test1	<input checked="" type="checkbox"/>
06/07/2023		Internet3	JohnnyYYYYZZZ	ewewr	Hoofdfolder	W 2021	<input checked="" type="checkbox"/>
05/07/2023		Internet3		Johnny Groe...	Hoofdfolder	word 2021	<input checked="" type="checkbox"/>
29/06/2023		Algemeen	Test PHP 8	Akte Test PH...	Map C	Testbestand G aaa	<input checked="" type="checkbox"/>
29/06/2023		Algemeen	Test PHP 8	Akte Test PH...	Map C	Testbestand G aa	<input checked="" type="checkbox"/>
29/06/2023		Algemeen	Test PHP 8	Akte Test PH...	Map C	Testbestand Haab	<input checked="" type="checkbox"/>
29/06/2023		Wijzig-publiceren			Hoofdfolder script22	#002 v0.2	<input checked="" type="checkbox"/>
29/06/2023		Algemeen			Hoofdfolder script22	#004 v0.16	<input checked="" type="checkbox"/>

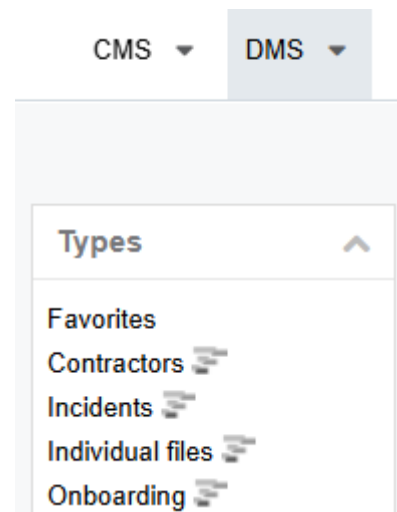
If Overview is available for the entire DMS, you can find it under the **DMS** menu, and then select the **Overview** menu option.



If Overview is available for selected case categories, this functionality can be found under the **DMS** menu and then the Per case menu option.

If the icon appears next to a category in the **Categories list**, you can open **Overview** for the relevant case category.

Please note that Overview can only be used if it is enabled in the DMS and you have been granted permissions to do so. Access to this functionality is determined by your organization.



## Columns

The **Columns** menu is located on the right side of the screen, where you can toggle the display of existing columns.

## Grouping Columns

By grouping columns in Overview, you can choose how the documents to be displayed are grouped.

The screenshot shows the 'DMS OVERVIEW - whole dms' interface. On the left, there is a filter input field and a 'Drag here to set row groups' area. Below this, the current column settings are shown: 'Last changed', 'Case', and 'Workflow'. On the right, a 'Columns' menu is open, displaying a list of columns with checkboxes and icons. The columns listed are: Last changed, Case, Workflow, Category, Case, Folder, Title, Status, Author, Created, Assigned, Duration, Archivering, and Vernietiging. A 'Pivot Mode' toggle is at the top of the menu, and a search bar is below it.

By combining column settings and grouping, documents within these groups can be quickly displayed.

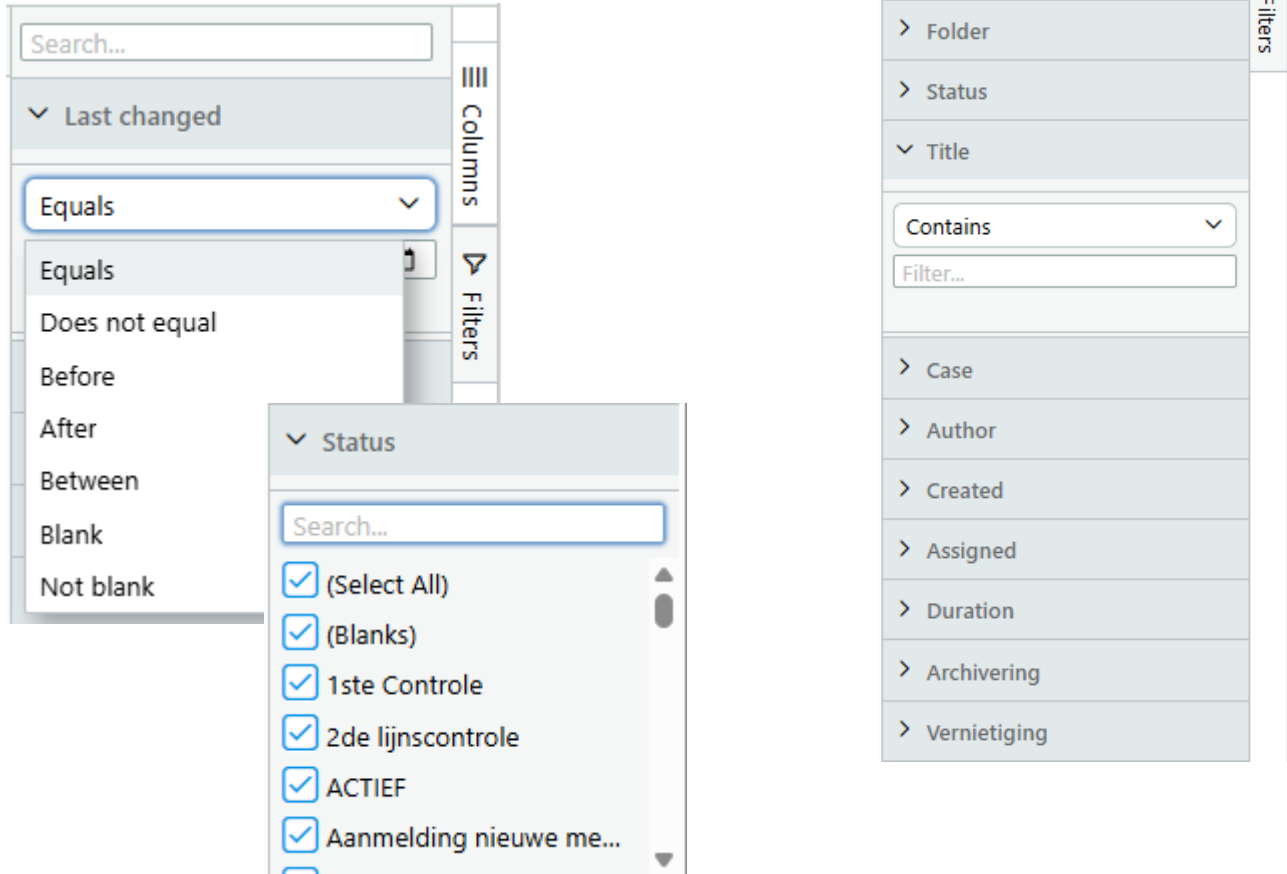
The screenshot shows the 'DMS OVERVIEW - whole dms' interface with a grouped list of documents. The filter input field is empty. The current column settings are 'Workflow' and 'Category'. The table has columns: Group, Last changed, Case, Folder, Status, and Title. The 'Group' column is expanded to show 'E-mail (36)' and 'Huurders (20)'. The 'Huurders (20)' group is selected, and the table displays four rows of documents.

Group	Last changed	Case	Folder	Status	Title
▼ E-mail (36)					
▼ Huurders (20)					
	30/01/2026 10:16:03	☑	1. Ingekomen	Concept	01 2025-11-23 onderhoud
	30/01/2026 10:16:02	☑	1. Ingekomen	Concept	02 2025-12-02 vreemde bezoe...
	30/01/2026 10:16:04	☑	1. Ingekomen	Concept	03 2025-12-10 geluidsoverlast
	30/01/2026 10:16:05	☑	1. Ingekomen	Concept	04 2025-12-21 praktisch onder...

## Filters

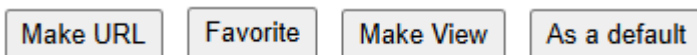
Further refinement is possible by using filters. Filters allow you to filter the overall selection or a specific section of the selection (see Grouping Columns) based on various properties.

For example, you can filter by the value in a column and even filter by the value range, as shown in the images on the right and below.

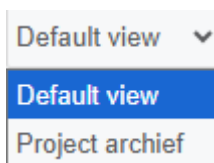


## Save Overview View

If a particular grouping and/or sorting is frequently used, an administrator can add a default view using the **As a default** button. Once added, this can be selected as **Default view** in the top right corner of Overview.



In addition, an administrator can create and name an additional view, after which it will appear under the given name in the menu at the top right of Overview.

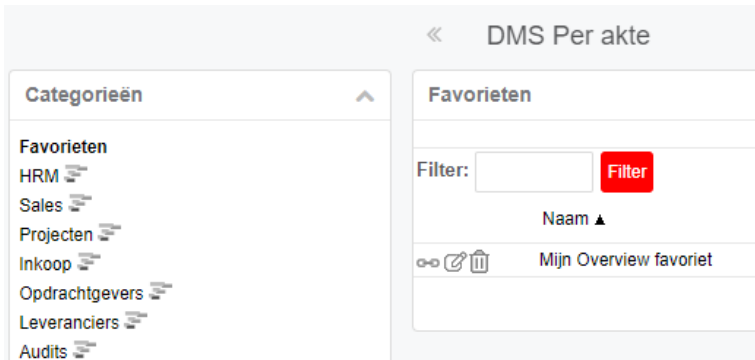


### Make URL (Share a View)

If you want to share a composite view with a colleague who also has access to Overview for the same case category or the entire DMS, you can generate a URL using the **Make URL** button on the left below the Overview screen. This URL will then appear in the address bar and can be copied and shared, for example, in a video conference with colleagues who have access to the DMS. The link can also be bookmarked in the browser and placed in the address bar, for example.

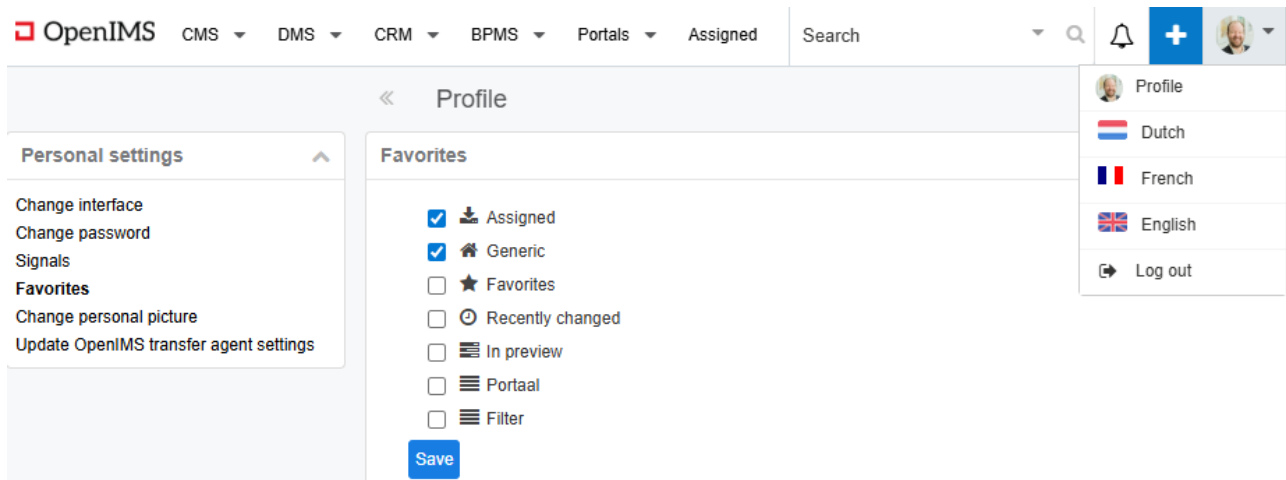
### Favorite

If you want to save a standard view for your own use, you can also set it as a favorite in the DMS. Click the **Favorite** button in the bottom left corner of Overview, and you will be asked to enter a name. After confirming, the favorite will be saved to your personal DMS favorites menu, which can be found under the main menu: **DMS > Per case > Favorites**, as shown below.



## 5 PERSONAL PROFILE SETTINGS

OpenIMS has a number of personal profile settings. These are described in this chapter. The profile setting can be found in the menu at the top right of the screen after logging in.

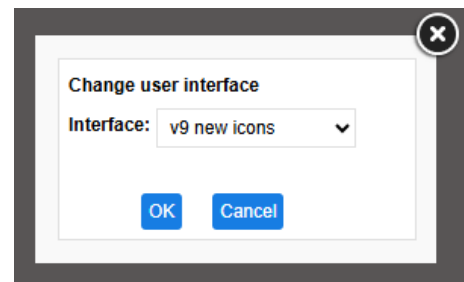


### 5.1 Change language

The DMS is multilingual. The available language options can be found in the menu at the top right of the screen after logging in.

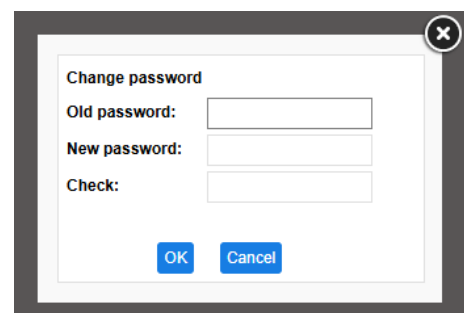
### 5.2 Change interface

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



### 5.3 Change password

To change your password, click **Change Password**. A password shouldn't be too simple and ideally should contain a combination of uppercase and lowercase letters, numbers, and characters. Current recommendations are on a minimum of 16 characters for a password.



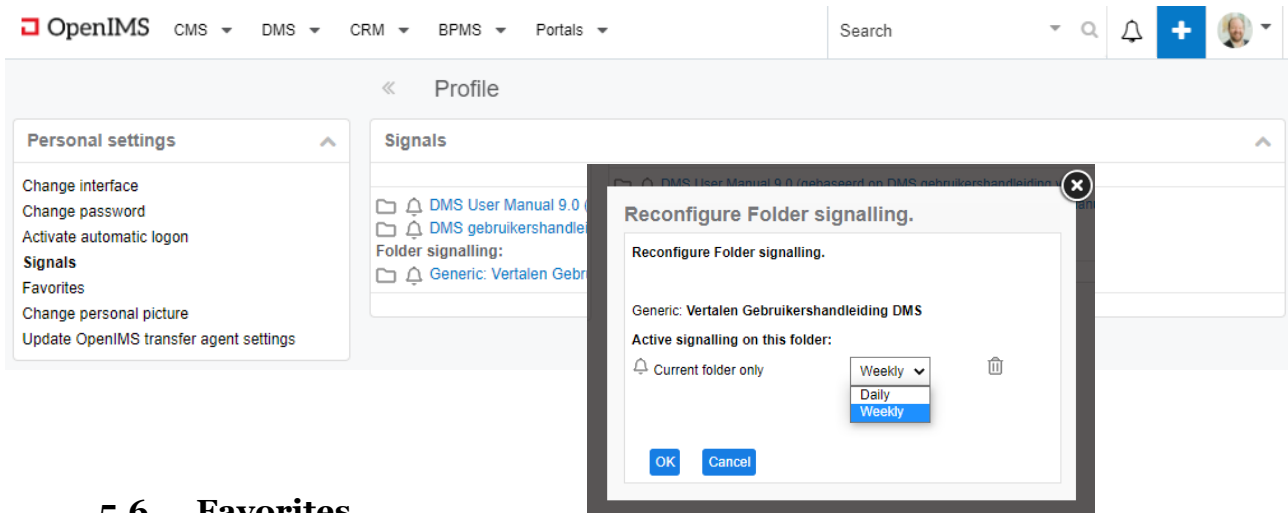
### 5.4 Activate automatic logon

If you work with OpenIMS, always from the same computer, it may be useful to activate automatic login. If you switch on your PC and log in to the company network, you no longer need to log in to OpenIMS. This functionality is only available on the computer on which you activate this option. This means that you must also activate this function on another computer, if you want to log in automatically.

**Note:** if several people work with your computer (flex desk), it is advised not to use automatic login since there is a risk that others can use OpenIMS using your account.

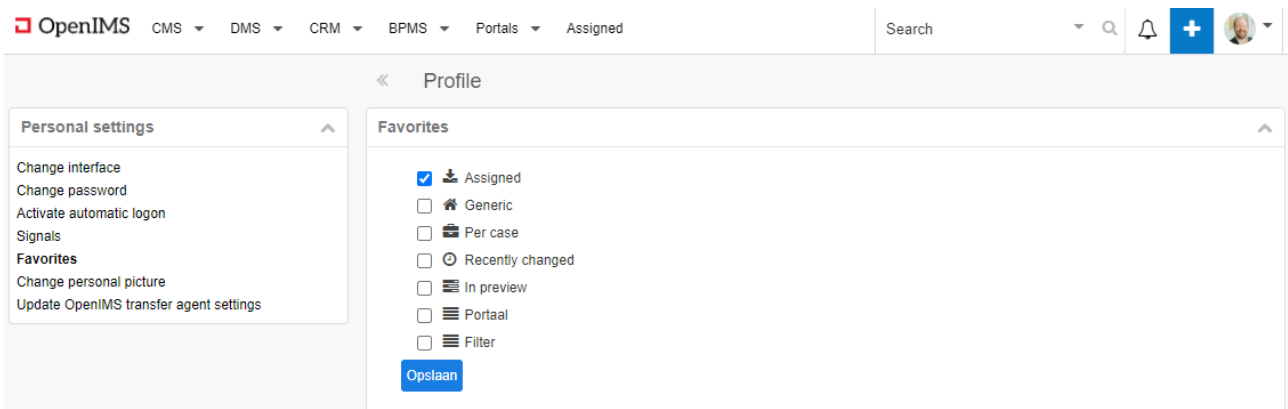
## 5.5 Signals

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



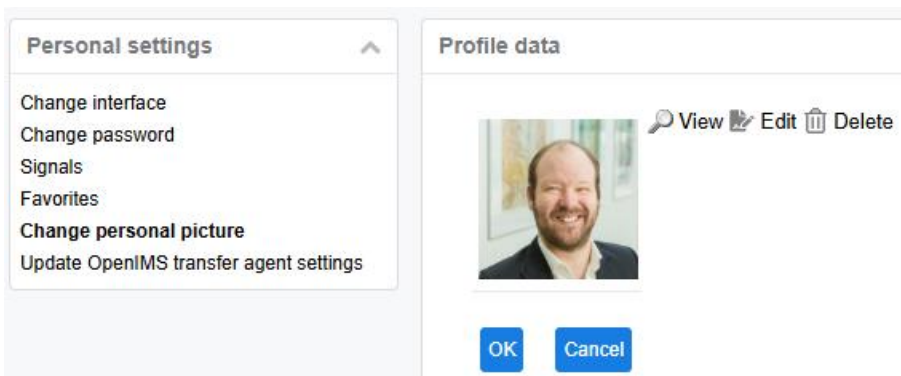
## 5.6 Favorites

In OpenIMS it is possible to indicate under **Favorites** which functionalities you want to show additionally in the DMS bar. In below example **Assigned** has been chosen to show in the DMS bar. The order of the additional functionalities to be displayed can also be changed.



## 5.7 Change personal picture

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

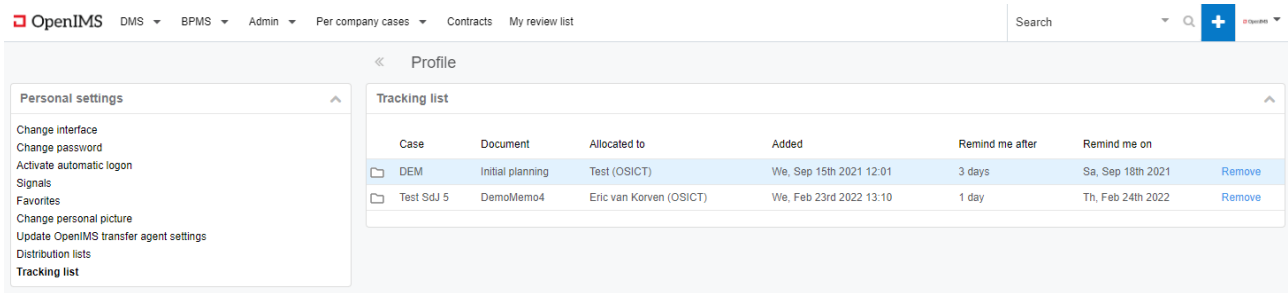


## 5.8 Update OpenIMS Transfer Agent

With this option, certain settings that the OpenIMS Transfer Agent needs to function properly are set by OpenIMS. See also **OpenIMS Transfer Agent** (chapter 6) in this manual.

## 5.9 Tracking list (optional)

An overview of the documents on the tracking list can be obtained by clicking on **Profile** and then on Tracking list.



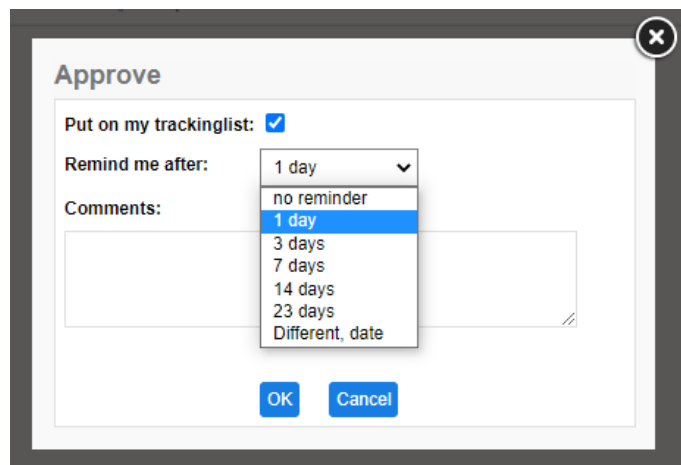
The screenshot shows the OpenIMS user interface. At the top, there is a navigation bar with the OpenIMS logo and several menu items: DMS, BPMS, Admin, Per company cases, Contracts, and My review list. A search bar is on the right. Below the navigation bar, the page title is "Profile". On the left side, there is a "Personal settings" sidebar with options like "Change interface", "Change password", "Activate automatic logon", "Signals", "Favorites", "Change personal picture", "Update OpenIMS transfer agent settings", "Distribution lists", and "Tracking list". The main content area is titled "Tracking list" and contains a table with the following data:

Case	Document	Allocated to	Added	Remind me after	Remind me on	
DEM	Initial planning	Test (OSICT)	We, Sep 15th 2021 12:01	3 days	Sa, Sep 18th 2021	<a href="#">Remove</a>
Test SdJ 5	DemoMemo4	Eric van Korven (OSICT)	We, Feb 23rd 2022 13:10	1 day	Th, Feb 24th 2022	<a href="#">Remove</a>

In this overview there is also the option to remove documents by clicking on **Delete** in the line of the document.

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

A period can be selected that draws your attention to the document on your watch list.



The screenshot shows a dialog box titled "Approve". It has a close button (X) in the top right corner. The dialog contains the following elements:

- Put on my trackinglist:** A checkbox that is checked.
- Remind me after:** A dropdown menu with the following options: "1 day", "no reminder", "1 day" (highlighted), "3 days", "7 days", "14 days", "23 days", and "Different, date".
- Comments:** A text input field.
- Buttons:** "OK" and "Cancel" buttons at the bottom.

## 6 OPENIMS TRANSFER AGENT

Before you can edit documents with OpenIMS, the OpenIMS Transfer Agent must first be installed on the computer in use. The OpenIMS Transfer Agent is an application from OpenSesame ICT designed for automatically checking files in and out of OpenIMS. The Transfer Agent facilitates these actions and reserves any edited files.

OpenIMS, as a document management tool, has several built-in security mechanisms to prevent information loss. If, for any reason, the file is not saved correctly in OpenIMS, it is important to use these mechanisms correctly.

### 6.1 Install OpenIMS Transfer Agent

The OpenIMS Transfer Agent is installed locally. The latest version of the OpenIMS Transfer Agent can be downloaded from the OpenIMS website. The OpenIMS Transfer Agent is available there as an .exe and .msi installation manager.

- <https://doc.openims.com/beheer/installatie/transfer-agent>

The following option is primarily intended for installation on clients without an internet connection. If no internet connection is available, the current version can be provided by the workspace administrator via the following URL:

- <http://<yourwebsite>/openims/setup.exe>

The workspace administrator in your organization may also handle the rollout of the correct version of the OpenIMS Transfer Agent, either automatically or manually.

### 6.2 Configuration

The settings of the OpenIMS Transfer Agent can be found on your computer via the start menu in the menu **All > Configure Agent**.

#### 6.2.1 General tab

**Language:** Configure the desired language of the Transfer Agent.

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

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

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

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

The screenshot shows the 'Configuration [OpenIMS TA 4.2.9.40]' dialog box with the 'General' tab selected. The settings are as follows:

Language:	English
Caching:	<input type="checkbox"/>
Upload limit:	
Temp DIR:	
Key:	ydozr8nyglghl8d89weyww
Username:	test
Supergroup:	openims
Server:	www.osict.com
Do not take over lock:	<input type="checkbox"/>
Choose use local file:	<input type="checkbox"/>
Application timeout:	7
No already opened popup:	<input type="checkbox"/>
Only LockFile with:	
Force IP Type:	
Use UTF8:	<input type="checkbox"/>

Buttons: Default settings, OK, Cancel

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

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

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

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

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

**Force IP Type:** This allows the IP protocol used to be fixed to 4 (IPv4) or 6 (IPv6) if required.

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

### 6.2.2 Proxy Settings Tab

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

**Address:** Enter the IP-address of the proxy server.

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

**Username:** Enter the username to connect to the proxy server.

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

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

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

**Default Settings:** This resets the proxy settings to the Transfer Agent defaults.

The screenshot shows a dialog box titled "Configuration [OpenIMS TA 4.2.9.40]" with a close button (X) in the top right corner. The dialog has three tabs: "General", "Proxy settings" (which is selected), and "Debugging". The "Proxy settings" tab contains the following fields and controls:

- Automatic:** A checkbox that is checked.
- Address:** A text input field.
- Port:** A text input field.
- Username:** A text input field.
- Password:** A text input field.
- Basic authentication:** A checkbox that is unchecked.
- No proxy for:** A large empty text area.
- Default settings:** A button located below the "No proxy for" area.

At the bottom of the dialog box, there are two buttons: "OK" and "Cancel".

### 6.2.3 Debugging Tab

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

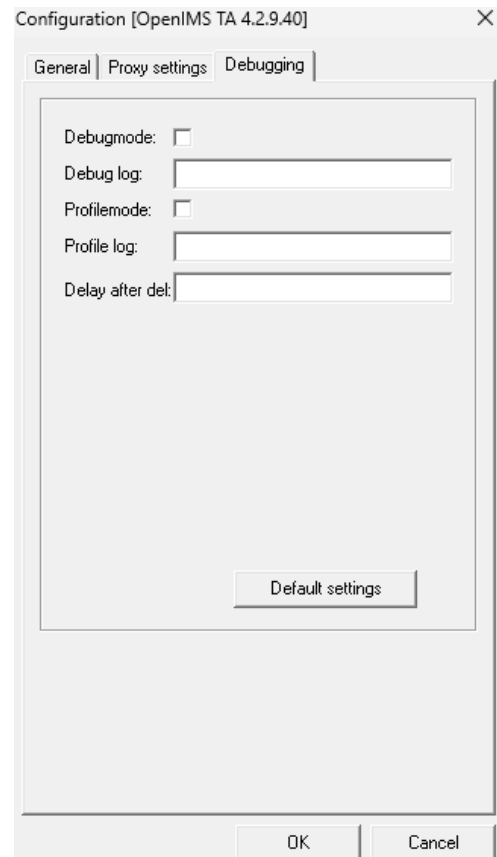
**Debug log:** Indicate to which file debug information is written by the Transfer-Agent.  
(eg c:\OpenIMS-debug.log)

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

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

**Delay after del:** This is a debug mode to apply a delay to the delete and edit command when using an OpenIMS download folder.

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



## 6.3 Using the Transfer Agent

### 6.3.1 Save to OpenIMS

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

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

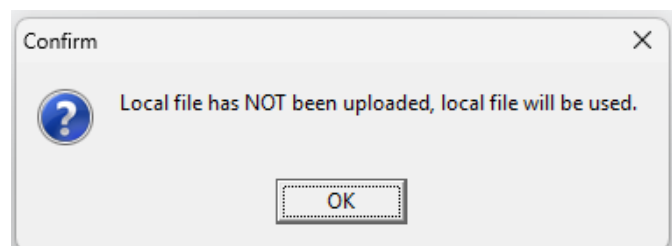
Note: If the MS Word OpenIMS plug-in is not used, if you choose **Save as** in MS Word (or another application), the Transfer Agent will disconnect the OpenIMS server. The consequence of this is that changes are not or only partly saved in OpenIMS.

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

### 6.3.2 Safety Mechanism

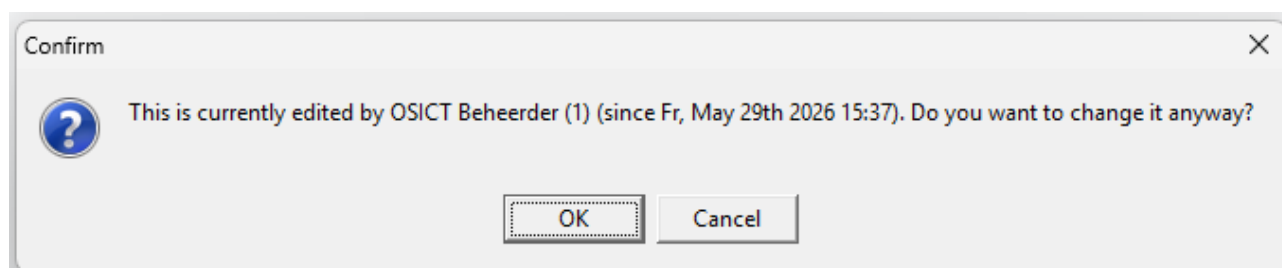
In case something goes wrong, for example the connection to the network is temporarily lost, it does not mean that the user has lost changes to the document. The moment the user (at the same workplace) changes the document again from OpenIMS, the Transfer Agent will detect that something has gone wrong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

This message will only appear once. The user should select **OK** to ensure that no information is lost and may continue working with the local file.



### 6.3.3 Simultaneous changes

A user may want to modify a file that is already being modified by another user. Since a file cannot be changed by multiple users at the same time, you will receive a notification. Note: This does not apply to reading a file.



It is recommended that the user choose **Cancel** and wait for the file to be released in OpenIMS. The user may also contact the respective user.

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

It is possible to configure the Transfer Agent to change this notification to just **OK** (see **Do not take over lock** in the general tab settings) effectively choosing not to modify the file while it is opened by another user.

### 6.3.4 Frequently Asked Questions

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

#### What exactly does the Caching setting do?

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

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

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

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

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

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

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

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

#### 6.3.5 How does the Transfer Agent interact with Microsoft Word's AutoSave?

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

If something goes wrong in Word, Word uses the file that starts with ~ before the name, in the same folder where the document is located. When you open the document again, Word will detect these temporary files and offer the user certain recovery options. This works the same when the document is started by the Transfer Agent.

Be noted that **Caching** must be turned on, because otherwise a successful save will save the crashed file and remove the files from the temp folder to recover the crash.

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

## 7 WORK WITHOUT TRANSFER AGENT

To be able to use all functionality made available in the DMS, a user needs the OpenIMS Transfer Agent. In some situations, for example from a computer not belonging to your company, it is not possible to install and use this software.

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

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

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

### 7.1 Download

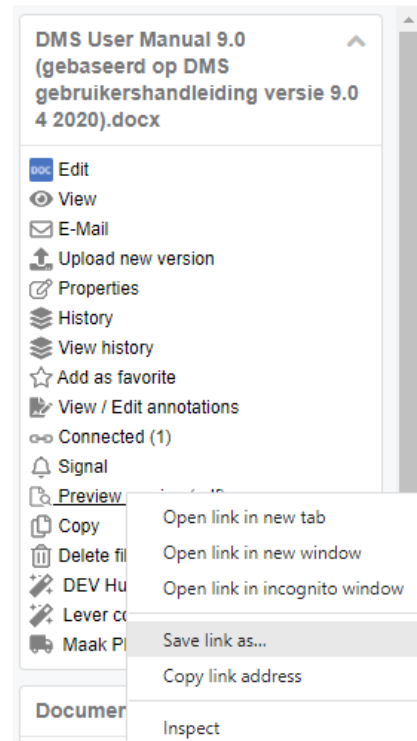
If you want to edit a document, you need to select the option **Published version** or **Preview version** in the **document actions section**. The relevant document will be retrieved (downloaded). You can now edit the document locally.

Note: If you close the browser, the changes made are not saved automatically, you will first have to save the relevant document locally (for example on your desktop or download folder) and then upload it again in the DMS (see below)

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

### 7.2 Upload

When you finished editing, you can transfer the document back to the DMS via the **Upload new version** function from the **document actions section**. The new version of the document is then uploaded to the DMS and the information in the column **Last changed** will be updated.



## 8 OPENIMS OUTLOOK ADD-IN

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

### 8.1 Client specifications

An OpenIMS® user must have a Microsoft-supported version of Microsoft Outlook (Classic) on Microsoft Windows. The OpenIMS® Transfer Agent also needs to be installed.

Note: Information about installation and configuration for current versions of the OpenIMS Transfer Agent, Outlook integration, and required components is available for system administrators on our documentation website: <http://doc.openims.com>.

### 8.2 Activate Client settings

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

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

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

### 8.3 Registration e-mail

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

#### 8.3.1 OpenIMS Outlook registration interface

The registration of both received and sent e-mail messages is done through the same user interface.

**Recently selected folders** An employee can choose from the last 10 selected cases that have recently been used (1) to store an e-mail message.

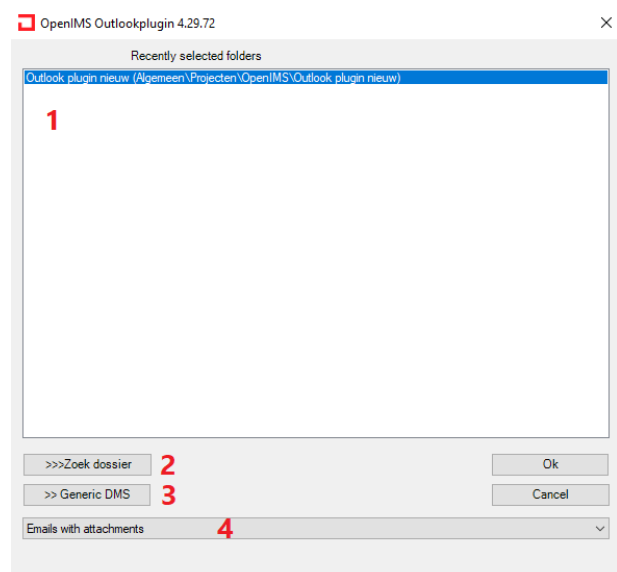
**Search case** Provides the option to search for a project / case (2).

**Generic DMS** Provides access to the folder tree of the Generic folder section within OpenIMS DMS (3).

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

**Emails with attachments** (selecting this option will save the e-mail including attachment in OpenIMS);

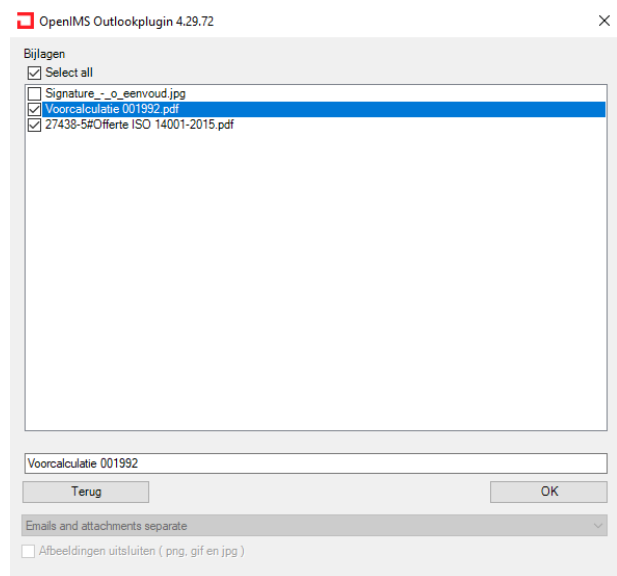
**Emails (and remove them** Same as above, additionally the e-mail is also deleted from MS Outlook;



**Attachments** Only the attachments are registered, the plain text of the e-mail is not registered;

**E-mails with attachments separately** Both the e-mail and the attachments will be saved separately. In the DMS, both the e-mail and the attachments have a functional link with each other. In addition, the attachments can be checked and unchecked in the dialog box. This prevents non-relevant attachments (e.g. logos, etc.) from being registered:

It is also possible to rename the attachment. When an attachment is selected, the name is shown in the dialog where it can be edited.



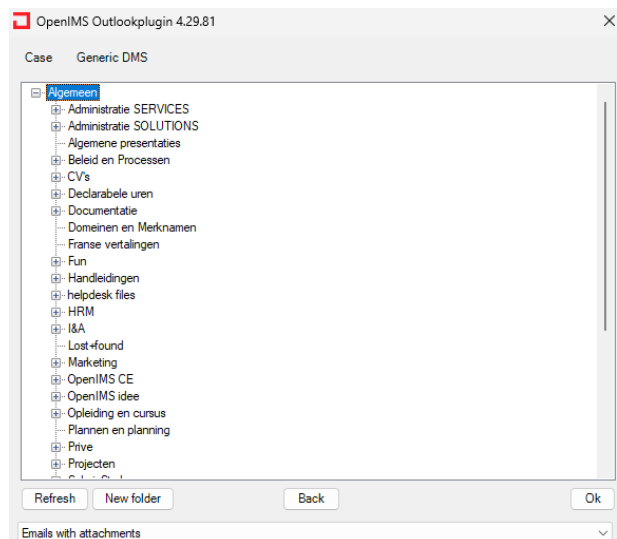
### 8.3.2 Working with the Generic DMS button

After clicking **Generic DMS**, the general folder tree is displayed. A user can now select the folder in which the relevant e-mail message should be placed.

If the user chooses **Refresh** then the general folder tree is reloaded. **Back** Returns to the start screen and with **OK** the relevant e-mail is sent to the selected DMS folder.

Also, you can still choose what should be saved. (the same options as in section 8.3.1 are available here).

Optionally, the user may add a new folder to the DMS using the **New folder** button.



### 8.3.3 Working with the button Search case

After choosing the **Search case** button the dialog shown here is displayed. If you have previously visited a certain case, the dialog will show it.

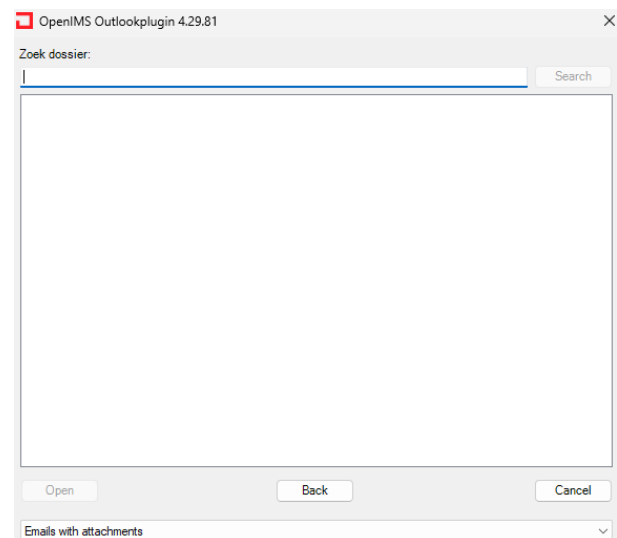
**Search field** You can also search for parts of the name of a case here (1).

**Search** Start the search (2).

**Back** Back to the start screen (3).

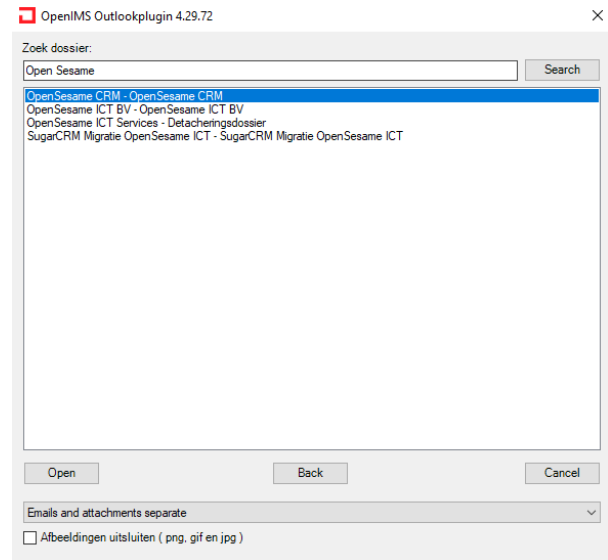
**Cancel** Close the search screen (4).

At (5) you can still choose what should be saved. (the same options as in section 8.3.1 are available here).



After starting the search, the interface looks like this:

Here you can click on the file name and choose **Open** to view the folder tree, or perform a new search. You can close the respective dialog by clicking **Cancel**.

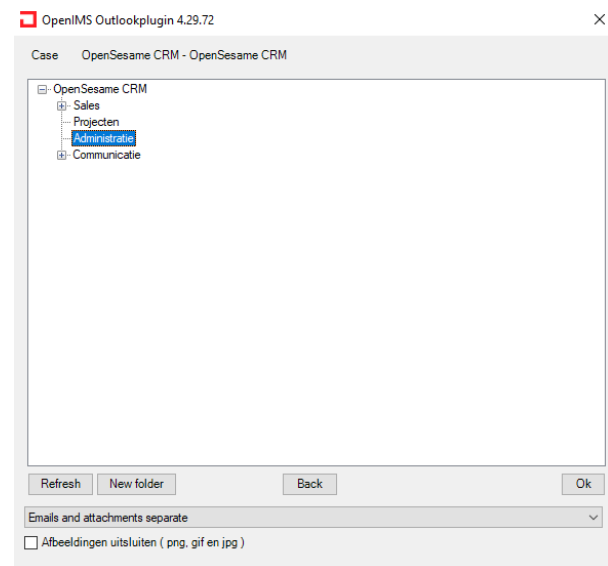


After the case has been loaded, you can navigate to the folder in which you want to place the relevant e-mail.

**OK** To initiate the action.

**Back** To search the list of cases again.

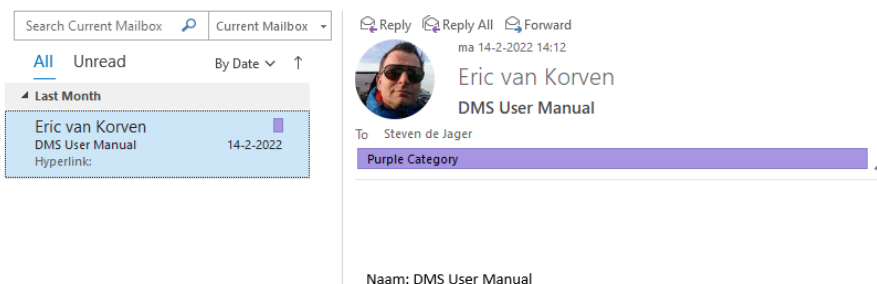
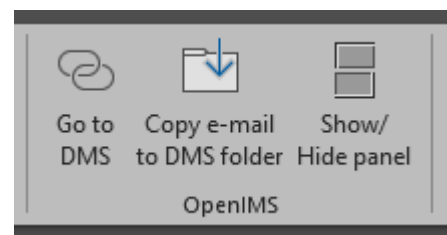
**Refresh** To get the folder tree again.



### 8.3.4 Registering received e-mails (using the ribbon)

Select the e-mail you want to register in the DMS. In Microsoft Outlook choose the button **Copy e-mail to DMS folder**. After this, the OpenIMS registration dialog is started and the e-mail is saved in the DMS after the necessary choices.

After registering an e-mail in the DMS, the received e-mail is marked with a Microsoft Outlook flag.



### 8.3.5 Registering received e-mails (Using the Favorites Panel)

Select the e-mail you want to register and drag it to the relevant folder of the relevant case. When you release the e-mail, the registration screen starts. The e-mail will be copied to the selected folder in the DMS.

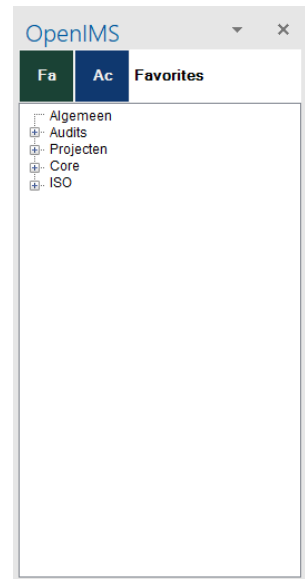
### 8.3.6 Registering sent e-mails

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

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

#### Post-registering a sent message

If you have chosen **No**, but still want to register the e-mail afterwards, you can select the e-mail in sent items and click the **Copy e-mail to DMS folder**.



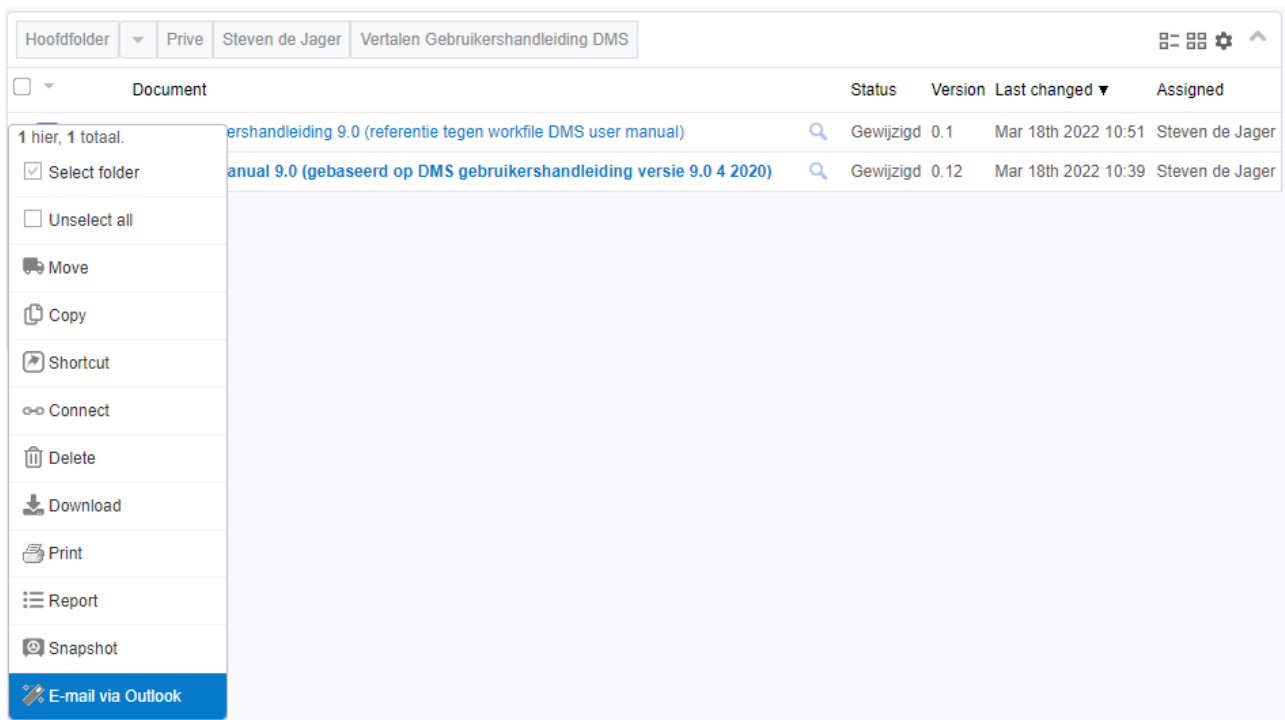
### 8.3.7 No connection to DMS server

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

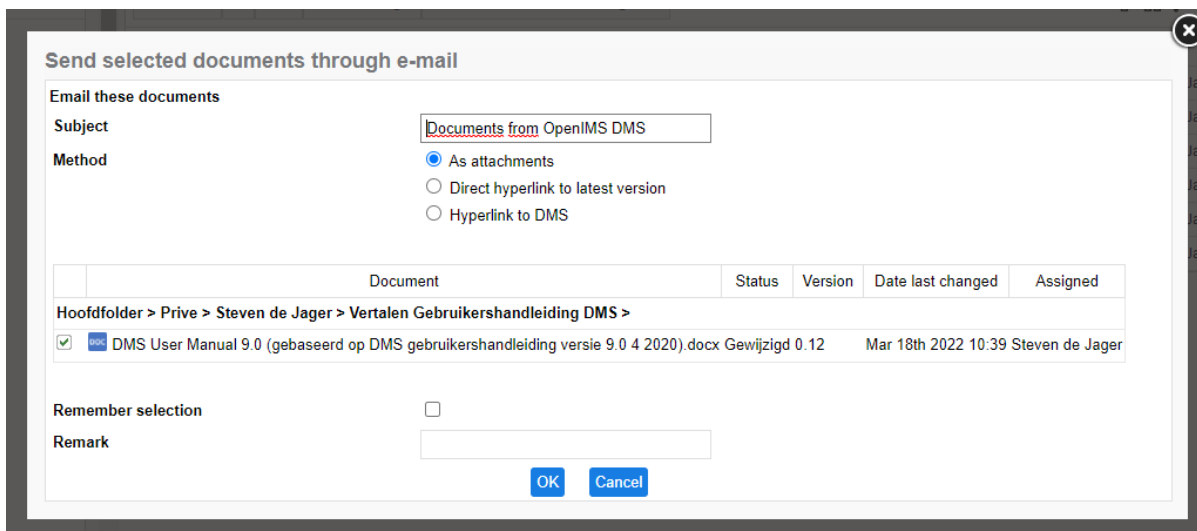
## 8.4 Sending DMS documents (attachments) via Outlook

In addition to registering e-mail, it is also possible to send documents from OpenIMS DMS via a OpenIMS DMS assistant. To use this facility Outlook must be started on the local PC of the user in question and the OpenIMS Outlook plug-in needs to be installed

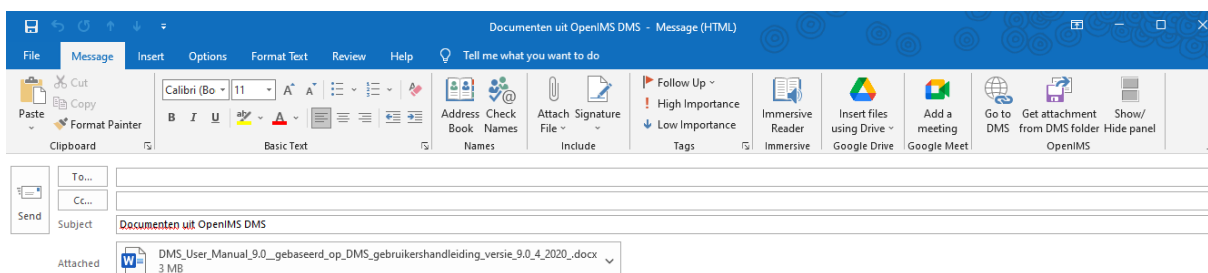
Select the documents you want to send by checking them. If wanted, select multiple documents this way. In the menu with actions for selected documents, choose **Email via Outlook**.



A new screen will open that shows the selected documents and provide various options. You may indicate how Outlook should send the documents, as a physical attachment or as a hyperlink, edit or enter the **Subject** and Choose **OK** to let Outlook generate an e-mail.



As a result, an e-mail will be opened containing the appropriate attachments.



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

## 9 SPECIAL FUNCTIONALITY

### 9.1 Working with AutoCAD Xrefs

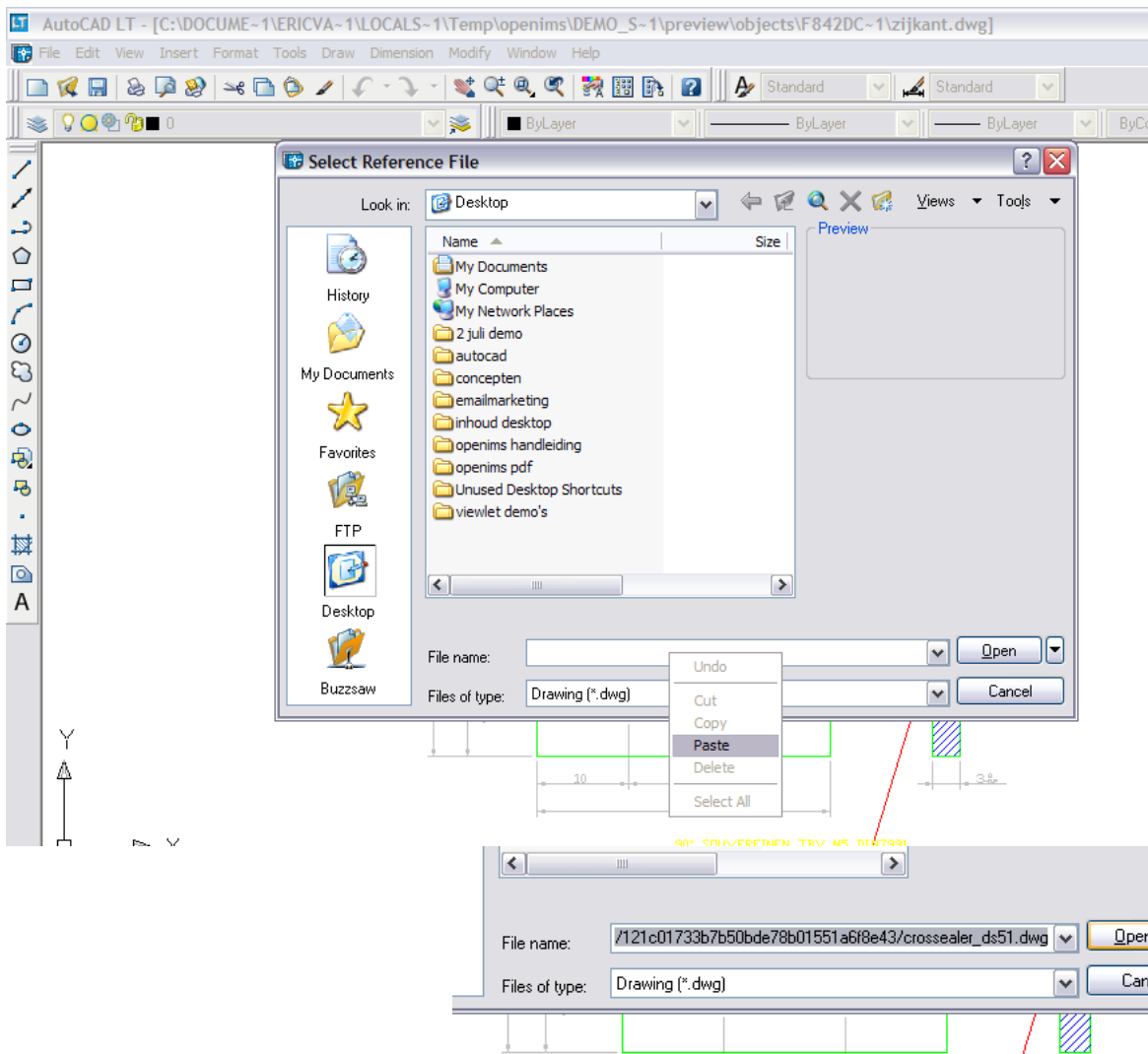
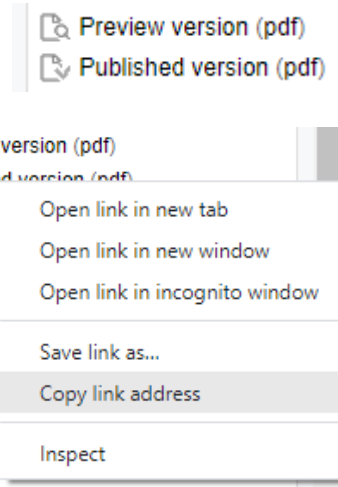
From within AutoCAD, it is possible to use existing drawings in a new drawing using an Xref link. OpenIMS supports this functionality. This ensures version control for both source as target.

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

From within OpenIMS, first select the source drawing that should be placed as Xref in another drawing, use the right mouse button in the **Document Actions** menu (see figure below) and select the **published** or **concept** version link you want to use and click the **Copy link address** menu item.

Copy this hyperlink to the target drawing as file location, by pasting the copied hyperlink into the new drawing using the Xref manager via the **Attach** option.

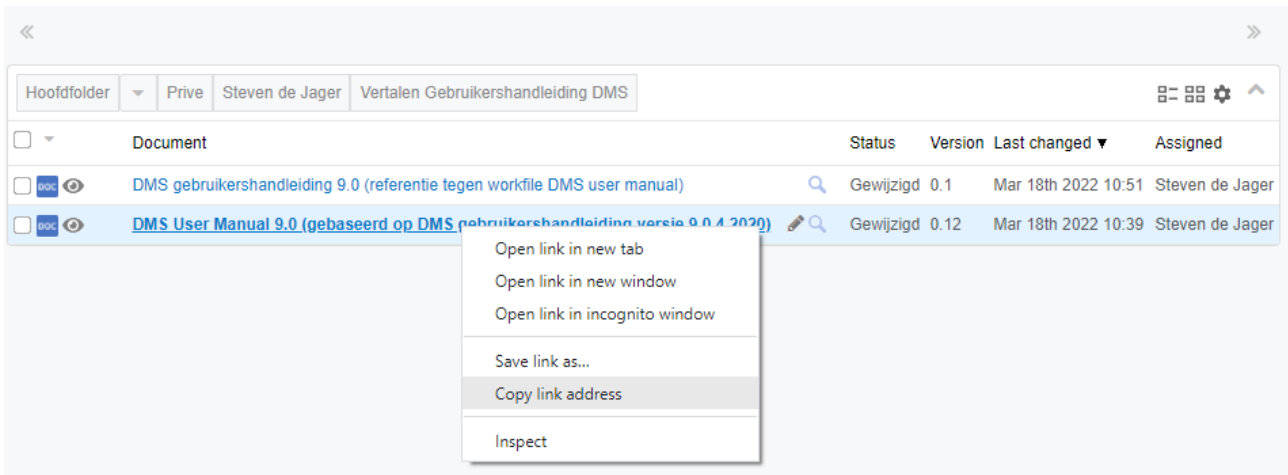
Go to the target drawing (Acad), open the Xref manager and copy the hyperlink (right mouse button, **Paste**) as file location (see below) and click **Open**.



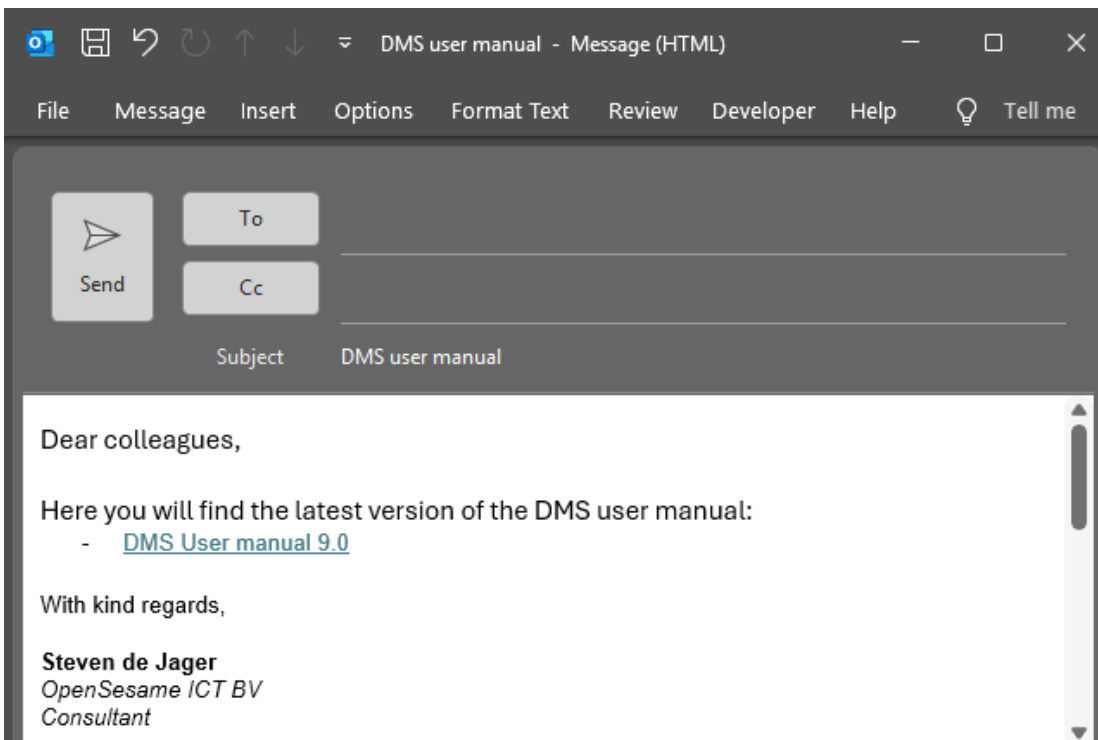
## 9.2 DMS Document hyperlinks in an e-mail

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

When the user hovers with the mouse pointer over a hyperlink of a relevant document to be sent by e-mail, select it by pressing the right mouse button, choose **Copy link address**.



In Outlook open an e-mail to place the link in the message using the **Paste** option (or Ctrl+V) and, if wanted, rename the link for showing a user-friendly name instead of the URL.




Use this method also for copying hyperlinks to documents, drawings, etc. into Word, Excel, PowerPoint and other applications.

## 9.3 Working with bookmarks and hyperlinks in your browser

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

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



Document	Status	Version	Last changed	Assigned
 <a href="#">DMS User Manual 9.0 (EN)</a>	 Gewijzigd	0.12	Mar 18th 2022 13:22	Steven de Jager
 <a href="#">DMS User Manual 9.0 (EN)</a>	 Gewijzigd		Mar 18th 2022 13:22	Steven de Jager
 <a href="#">DMS gebruikershandleiding 9.0 (referentie tegen workfile DMS user manual)</a>	 Gewijzigd	0.1	Mar 18th 2022 10:51	Steven de Jager

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

## 9.4 Work utilizing containers

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

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

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

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

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

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

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

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

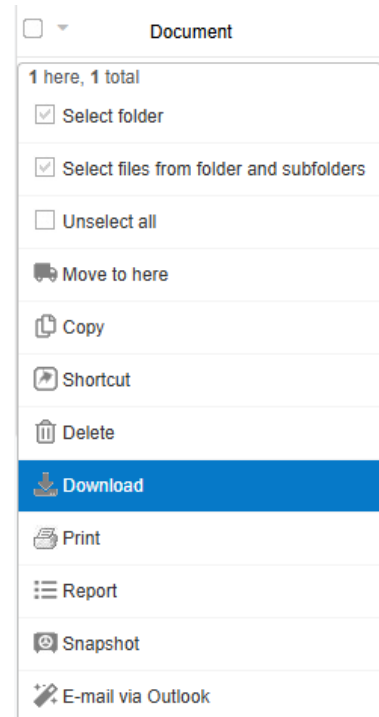
Your organization has access to OpenIMS DMS, your customers, partners and suppliers may not. Therefore, you will regularly want to send a physical document from OpenIMS as part of an e-mail.

To be able to send a document as an attachment (and you don't have the Outlook plug-in) you need to extract the document from OpenIMS DMS (download it to your local PC) and attach the document to an e-mail. If you do have the plug-in, you can use the mail functionality as described in chapter 8.4.

Select the documents you want to send and download the selected documents to your local PC. You can choose the option **Download** from the menu.

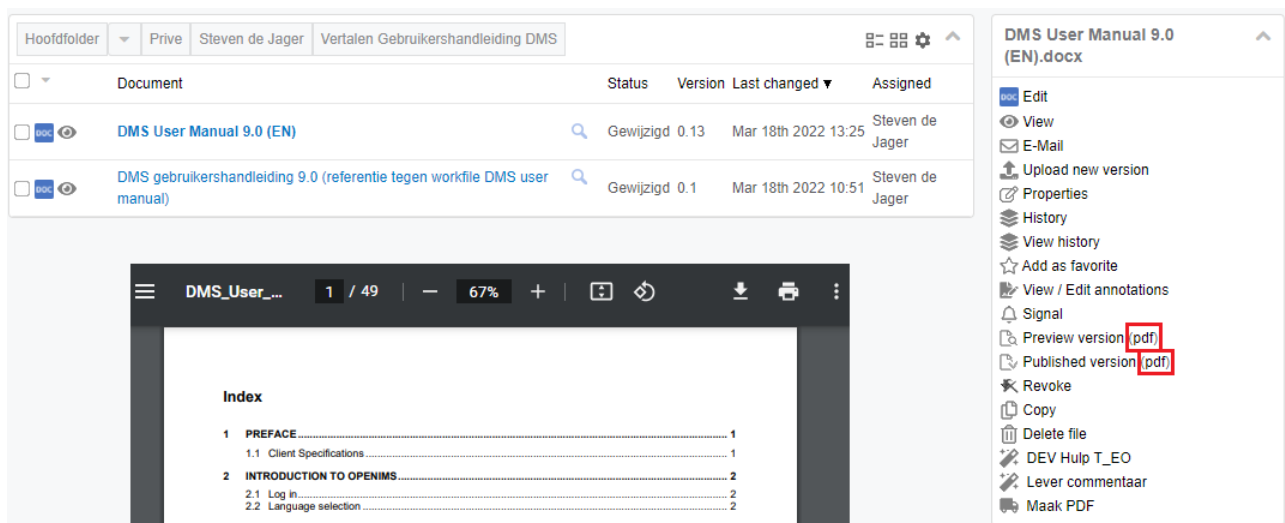
After you have chosen the download option, the current version of the document will be downloaded to your local PC, in the directory **C:\IMSTRANS** after which Windows Explorer will start automatically. Create an e-mail and add the attachment, which results in the current version of the document on your local PC will be attached to your e-mail.

**NOTE:** If you download one or more documents again from OpenIMS DMS, the documents that are already in the IMSTRANS directory will be deleted automatically.



## 9.6 MS Word to PDF document convertor

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



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

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