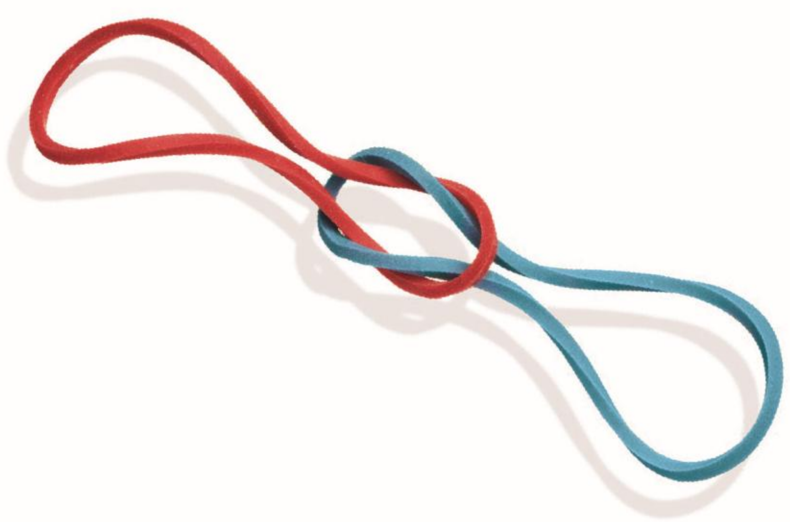
OpenIMS
DOCUMENT MANAGEMENT

Document Management Server

Administrator manual



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1 PREFACE

This document outlines what is available to you as an administrator. In addition to this standard OpenIMS administration manual, an online manual is available which you can find at https://doc.openims.com/.

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 DMS users to access all documents from any location, provided they have an internet connection, whereas working offline is also possible.

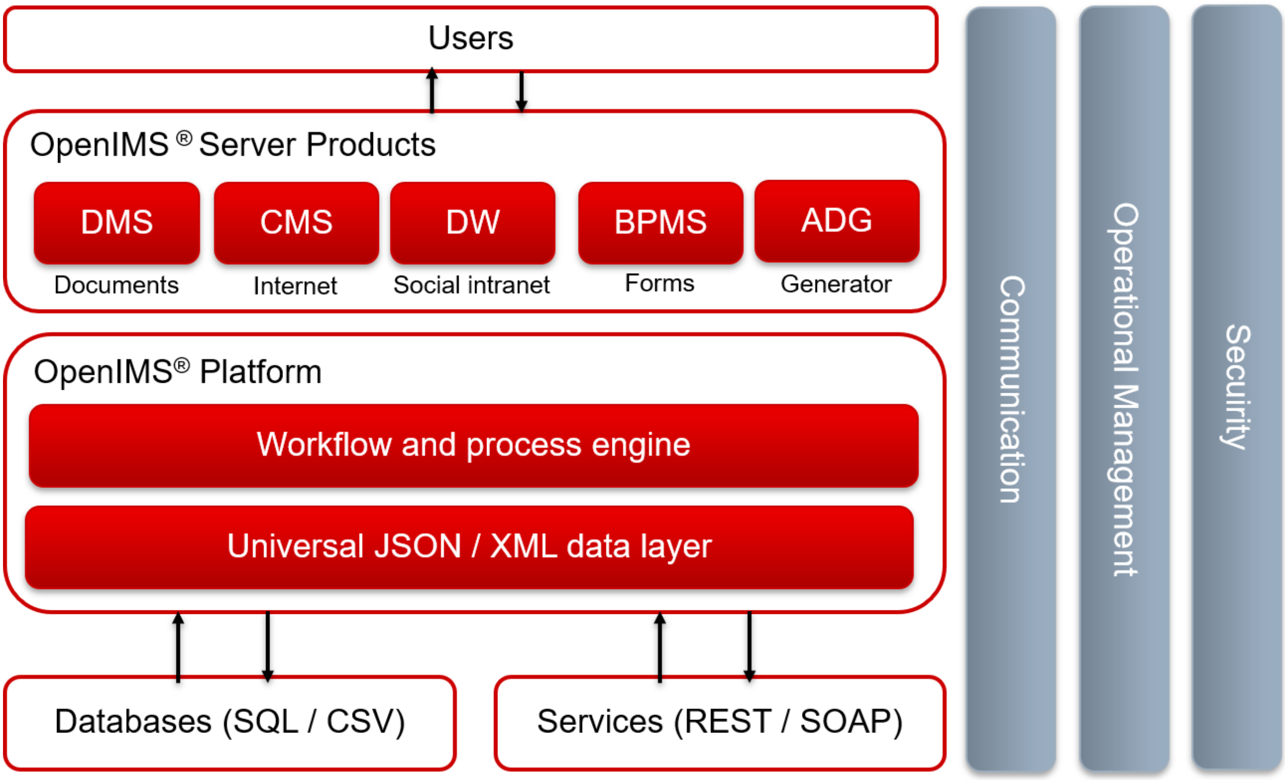
An OpenIMS user must have a computer available with at least:

- 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).

2 INTRODUCTION OPENIMS

The management of documents, knowledge, and websites shows many similarities. Systems for these types of applications are also increasingly converging into **Information Management** or **Enterprise Content Management** (ECM) systems. Simplicity must be central to all such systems.

OpenIMS is one of the first Information Management Servers (IMS) and was developed by OpenSesame ICT. Instead of separate solutions for Content Management, Document Management, Knowledge Management, and email archiving, OpenIMS offers an integrated solution for all these areas. The advantage of this integration is that document reuse is greatly promoted and there is a central repository for all possible forms of information.



2.1 Login

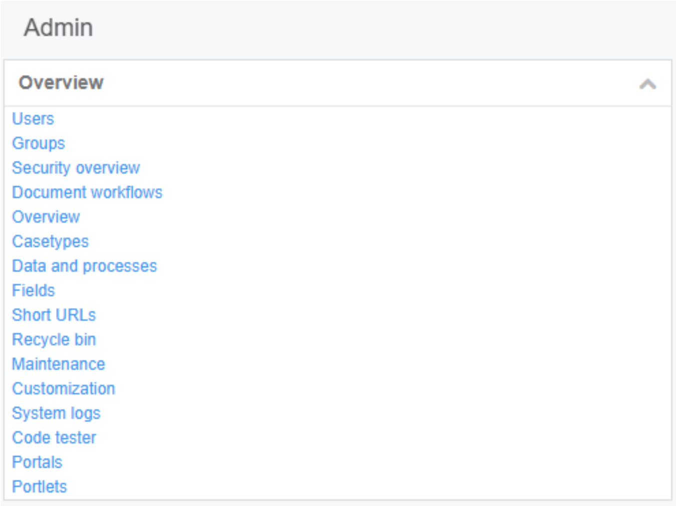
As indicated, OpenIMS is 100% web-based. This means that you perform all actions via your web browser. Depending on your rights, you may or may not be able to access certain parts. Therefore, you must be logged in to OpenIMS.

To access OpenIMS, start your web browser and enter the URL of the domain under which OpenIMS is available. To go to the **Admin** environment, add this word to the URL (for example, https://intranet.yourorganization.nl/admin). At that moment, the OpenIMS login screen appears.

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.

2.2 Admin menu



After logging in, you will enter the **Admin** environment, which contains the following sections:

Users Manage usernames and group structure.

Groups Manage groups and permissions.

Section-by-site Local security using the CMS redaction model within a single site collection.

Security overview Insight into all permissions defined between users, groups, and workflows.

Document workflows Workflows for both the DMS and CMS can be defined here.

Overview Manage overview views in case categories and custom views.

Casetypes Provision for managing case categories.

Data and processes You can go here to define BPMS processes.

EMS permissions Define permissions on EMS indexes. This feature must be made available via a configuration.

Fields This is the central point where all fields are defined.

Short URLs Create simple URLs to, for example, a web page or DMS case.

Recycle bin Location of deleted documents/web pages with recovery options.

Maintenance The maintenance screen allows administrators to install the latest version of OpenIMS, modify configurations, and the like.

Customization Every organization has different needs; to meet these needs, OpenIMS provides an environment in which these features can be developed. Examples include: navigation objects for the website, web applications, or connections with back-office systems.

System Logs Logs for relevant events that occur in the DMS.

Code tester Tool to test (adjustments in) code, assistants, and components.

Portals Location where dynamic (arrangement by end user) and static (arrangement by administrator) portals can be configured and managed. Portlets can be included within a portal.

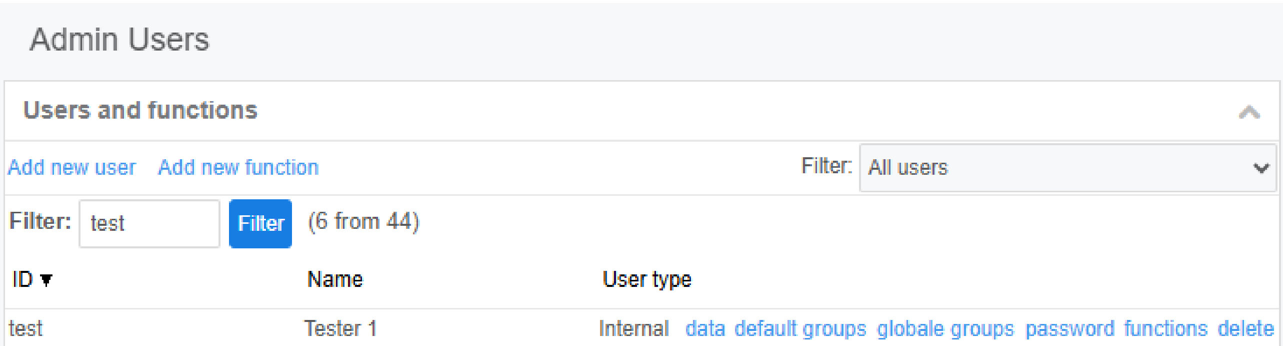
Portlets Location to create and manage various types of portlets that can be deployed in an OpenIMS portal.

3 USERS

If the **Users** option is selected in the **Admin** menu, an overview of the system's users appears. With more than 25 users, users can be browsed using previous/next.

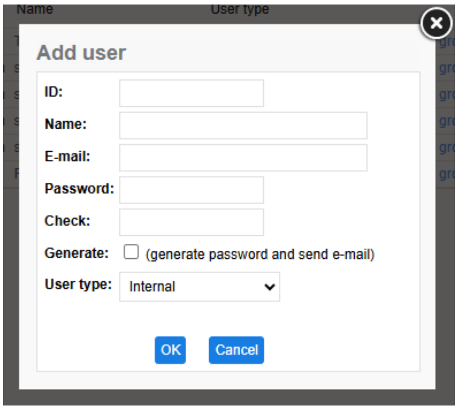
3.1 Search user

By entering part of a user's name in the filter field and then pressing the **Filter** button, all results corresponding to the search query will be displayed. The search function searches based on (parts of) words in the **ID** and the **name**. If the searched user is listed in the overview, they can be edited directly.



3.2 Add new user

New users can be created using the **Add New User** function. After clicking this option, you will be prompted to provide an ID, name, email, and password. The ID must be unique and cannot be changed later. The name is visible to the user when logged into OpenIMS. The password must contain at least 6 digits and/or letters and is not visible to the administrator later, but can be reset. The administrator can have OpenIMS generate passwords and send them directly to the provided email address. The email address is also used, among other things, for sending automatic OpenIMS signals from a workflow.



3.3 Password

All passwords are encrypted when stored. This means that a password cannot be traced back. Therefore, a user who has forgotten their password will need to be issued a new password.

With the **password** function, an administrator can issue new passwords or change a user's password. After entering the password, it is checked whether the password contains at least 8 digits and/or letters.

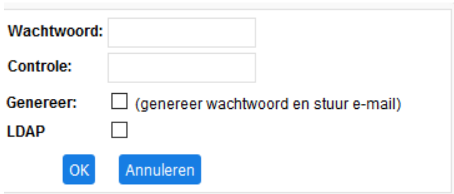
After logging into the system, the individual user has the option to change the currently valid password to a desired combination of digits and letters.

3.4 LDAP-validation

If the LDAP validation module is configured and enabled, user accounts can be validated against any directory service that supports validation via the LDAP protocol, such as Microsoft Active Directory. This service therefore requires some coordination and configuration efforts.

<ins>Note:</ins> The user ID in OpenIMS must match the user's username in the central user database.

Additionally, it is possible to decide on an account-by-account basis whether to enable or disable validation, so that, for example, OpenIMS administrators do not also need to create the account on the central system.

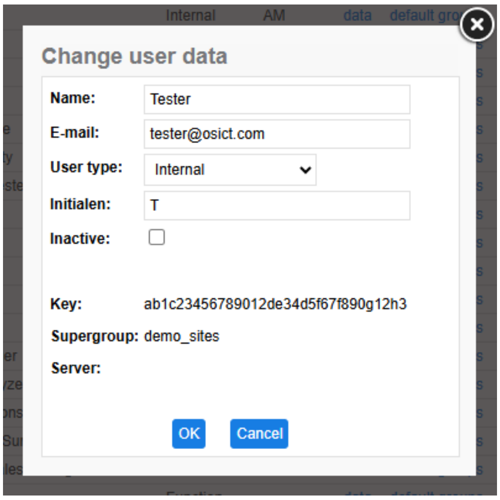


3.5 Editing (user) data

This function allows the administrator to edit the user's name or email address (by clicking on **data**).

Furthermore, added fields can be displayed, users can be made active or inactive, and the following additional fields can be activated: Key, Supergroup, and Server. This data must be entered into the OpenIMS transfer agent of the relevant user on the local PC.

A user can automatically enter this data into the OpenIMS transfer agent by going to **Settings** and clicking **Update OpenIMS transfer agent settings**. This feature is used, among other things, for the integration with Microsoft Outlook.

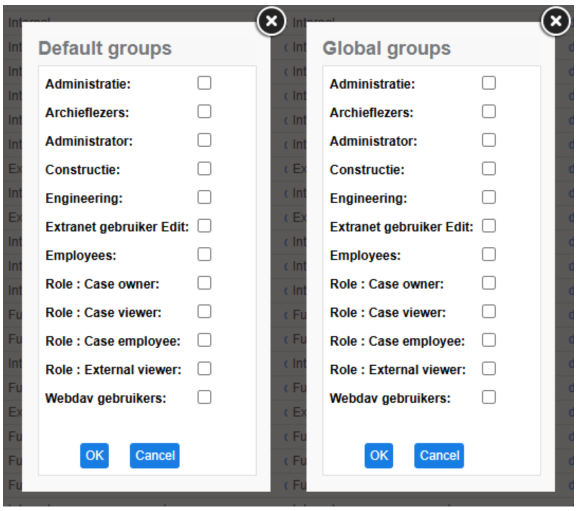


3.6 Placing users in groups

Every user <ins>must</ins> be in a user group to work within OpenIMS. Permissions are <ins>not</ins> assigned to individual users, but to user groups. Before you can assign a user, the user group must first be created.

Standard groups - The **standard groups** link displays an overview of all available user groups. A user can be assigned to a group by selecting it.

Global groups - Global groups are all-encompassing. If a user is in a specific group (for example, auditors or board members), this applies everywhere. Including in folders with local security (see 16.1).



3.7 Deleting or deactivating users

A user can be deleted by a click on the delete function. After which, a user can no longer log in and is also removed from all user groups. It is also possible to deactivate an account by checking the **Inactive** field under **Data**. The result of deactivation is that the account in question continues to exist, but the user concerned can no longer use it. Conversely, it is also possible to reactivate an inactive user.

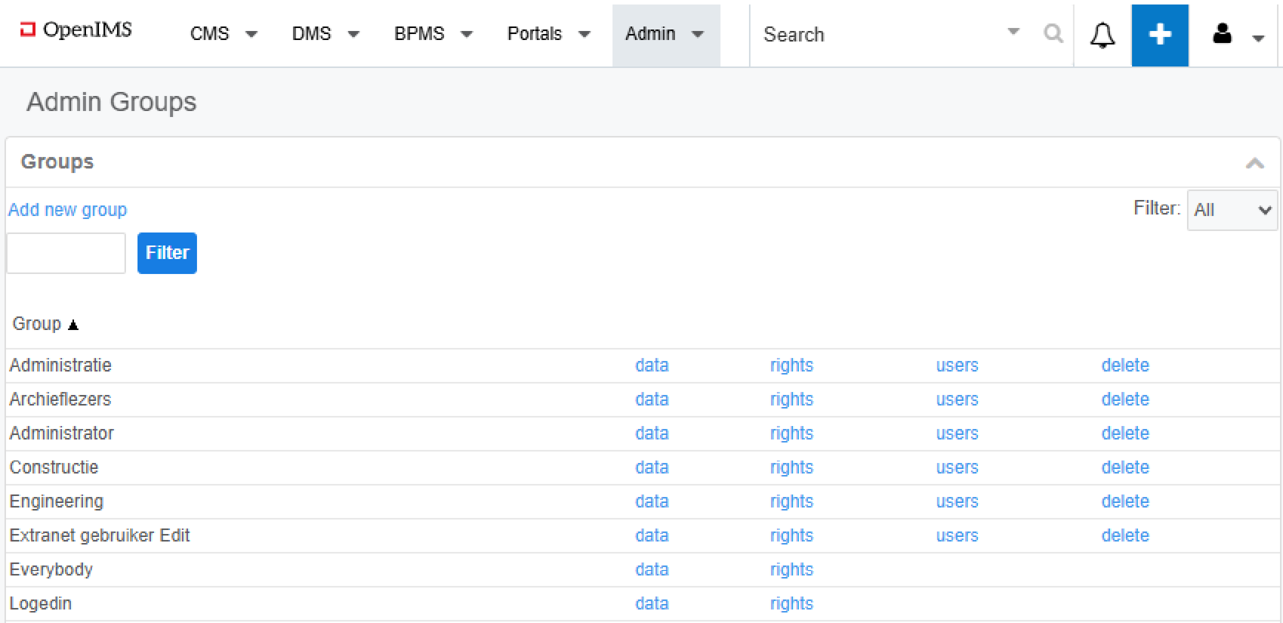
4 GROUPS

At the central level, all groups (or roles) are defined via the groups option. These groups are then available for the different security models (standard, global, local). The previous/next buttons allow you to browse through the overview.

Local groups
If a folder in the Document Management System (DMS) uses **local security**, it is configured at the case and/or folder level which groups a user belongs to. This replaces the default groups the user is in. In this way, specific roles can be defined at the folder level. This makes it possible to assign specific folders to people and/or group roles within the DMS.

<u>Note:</u> For OpenIMS CMS, only the standard groups are relevant. Local and global groups are therefore only relevant for OpenIMS DMS.

There are two special standard user groups: **Everyone** and **Logged In**. All users added to the system are automatically placed in these user groups. These (system) user groups cannot be deleted.

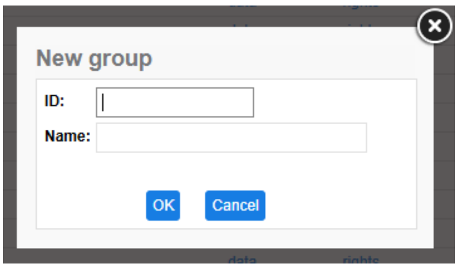


4.1 Search for a group

By entering part of a group's name in the filter field and then pressing the **Filter** button, all results related to the search query will be displayed. The search function searches based on (parts of) words in the ID and the name. If the group being searched for is listed in the overview, it can be edited directly.

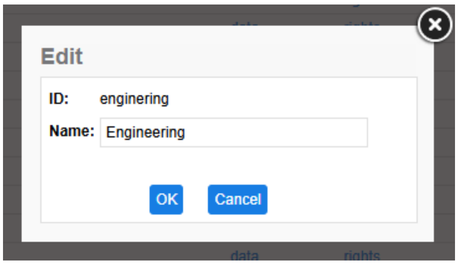
4.2 Create a new group

New groups can be created using the **add new group** function. After clicking this option, you will be asked to provide an ID and a Name. The ID must be unique and cannot be changed later.



4.3 Edit (group) data

This function allows the administrator to edit the group name (by clicking on **data**).



4.4 Assign permissions to a group

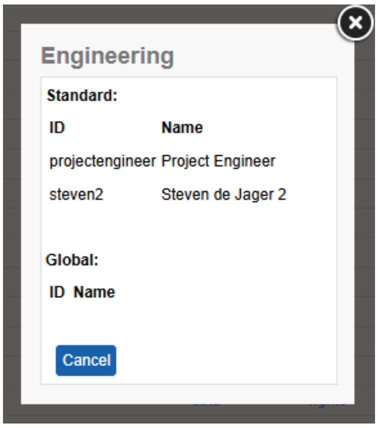
Permissions can be assigned to user groups using the **rights** function.

Permission	Product	Description
preview	CMS/DMS	Right to view preview versions of document/webpage/record. **Note:** This right is the minimum requirement to log in to OpenIMS.
newdoc	CMS/DMS	Right to create a new document.
moveto	DMS	Right to move files to the current folder.
upload	DMS	Right to upload new files.
folders	DMS	Right to manage folders.
foldersort	DMS	Right to sort folders, subselection of the right to manage folders.
cases	DMS	Right to manage/create/delete cases.
doctemplateedit	DMS	Right to add or remove document templates.
webtemplateedit	CMS	Right to alter webtemplates.
webtemplatepublish	CMS	Right to publish webtemplates.
develop	CMS/DMS	Right to edit PHP code.
portalmanagement	Portal	Right to manage portals and portlets.
connectmanagement	DMS	Right to manage document connections.
overview	DMS	Right to use the overview function.
overviewsys	DMS	Right to use the overview function which allows access to all document names.
locsys	DMS	This group can be used by local administrators.
adgmanagement	DMS	Right to use Advanced Document Management.
adgsystem	DMS	Right to manage Advanced Document Management.
system	All	All rights, including the right to manage rights.
archiveread	DMS	Right to view archive cases.
readonlyadmin	DMS	Right to view certain system matters in read-only mode.

Note: As soon as a new group is created, this group is entitled to all CMS templates by default.

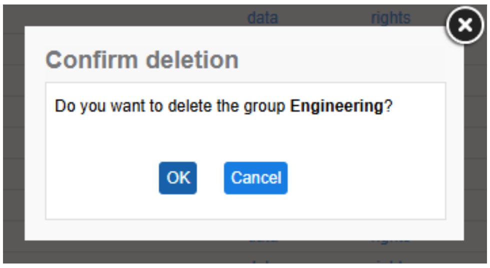
4.5 Users per group

Overview of the users assigned to the relevant group, for both the standard and the global group(s).



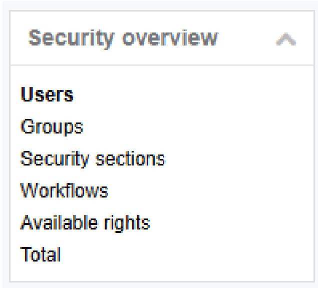
4.6 Deleting a group

The administrator can use this to delete a user group.

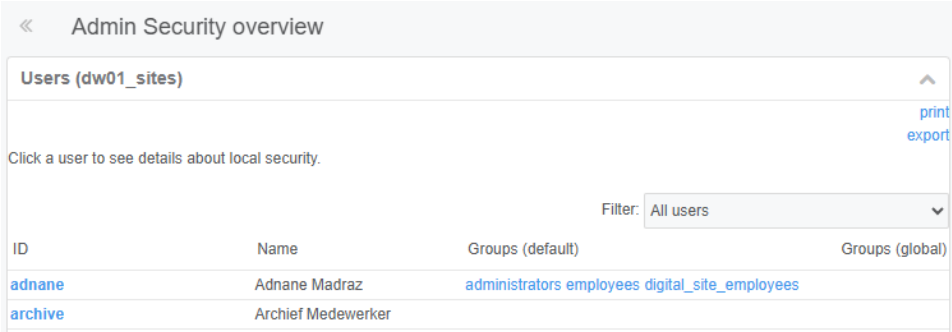


5 OVERVIEW OF PERMISSIONS

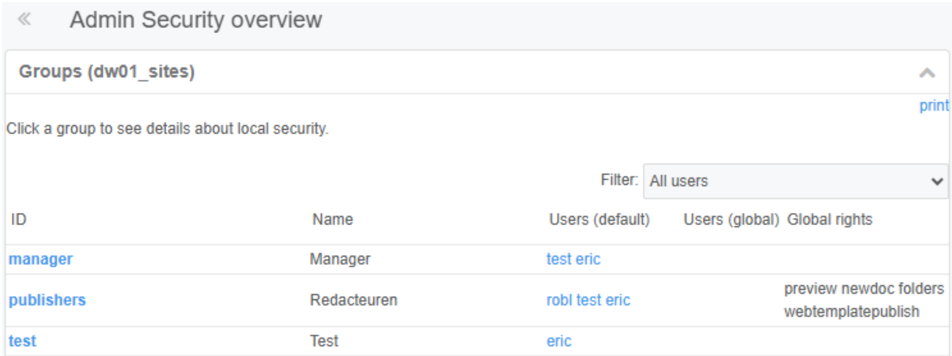
The overview provides a complete overview of all users, groups, local security, workflows, and the relationships between them.



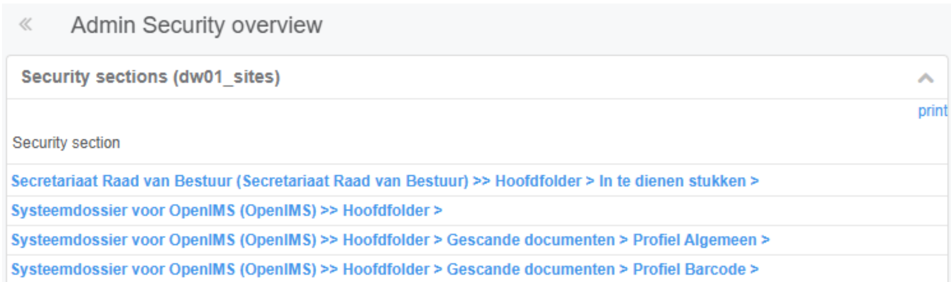
Users This section shows, for each user, in which group(s) they are assigned.



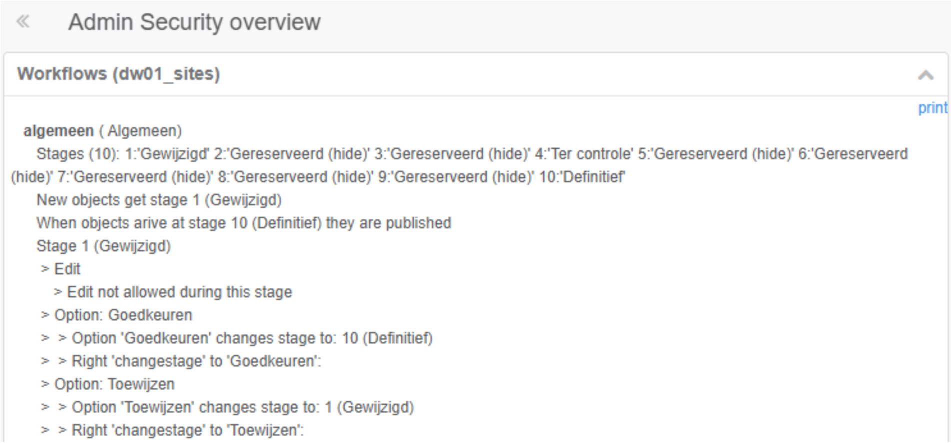
Groups This section shows the users within the relevant group for each group, both standard, global, and local for folders.



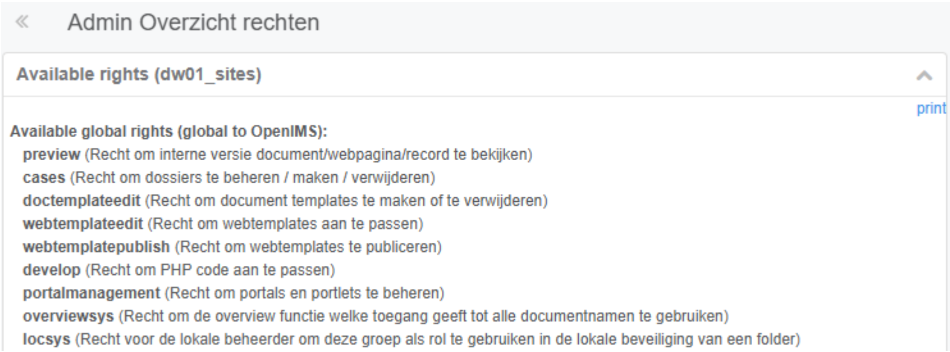
Security sections This section shows the folders for which local security is set. Clicking on the line navigates to the relevant local security.



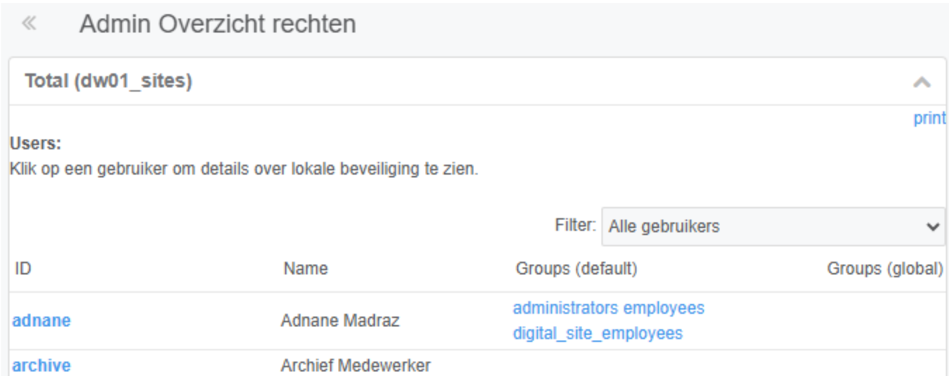
Workflows This section shows the read view of the existing workflows and the permissions set on them.



Available rights This section shows the available permissions within the relevant components of OpenIMS.



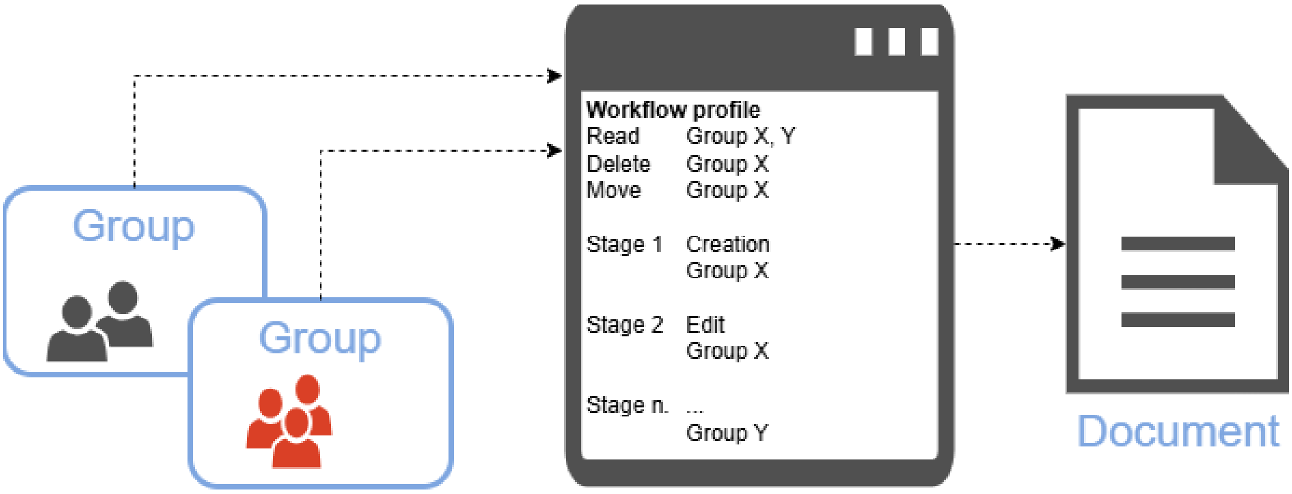
Total This section shows a composite view of the overviews described above.



6 DOCUMENT WORKFLOWS

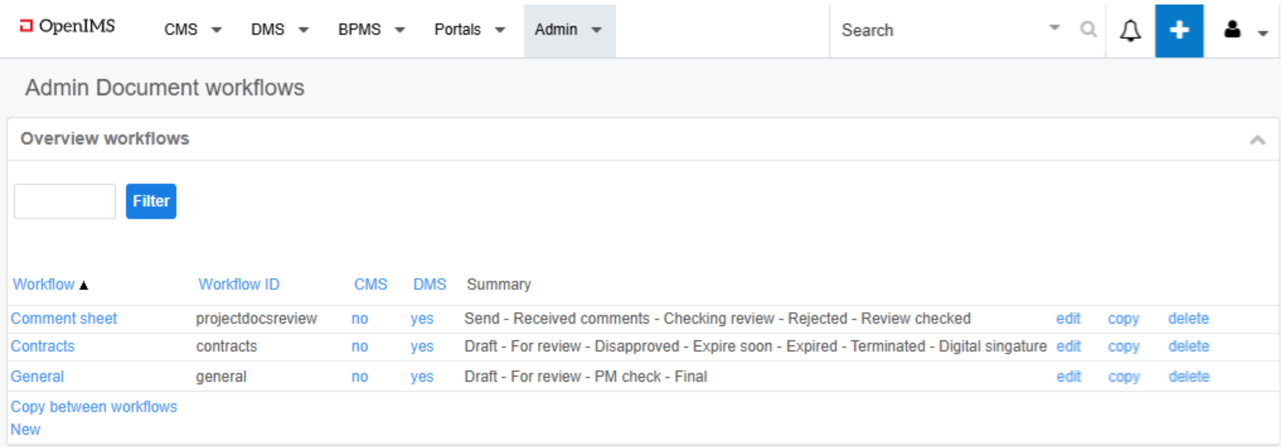
OpenIMS uses (document) workflows. Every document or web page is linked to a workflow; a workflow is assigned during the creation of a document. A workflow contains not only the various stages a document or web page can go through, but the entire authorization model is also incorporated into a workflow. The OpenIMS search engine takes the workflow's authorization model into account.

This section explains how the basic rights on a document are defined and how a workflow can be configured for use in the CMS and the DMS.



6.1 Workflow overview

Via the **Admin** menu, you can click on the **Document Workflows** option. On this screen, you can view which workflows are available, edit them, copy them (create a new workflow based on an existing workflow), or delete them. Furthermore, you can specify within which product (CMS/DMS) the workflow should be available.



OpenIMS features two default workflows that cannot be deleted; these are the workflows with the workflow ID:

- **direct**; Default workflow for the DMS.
- **edit-publish**; Default workflow for the CMS.

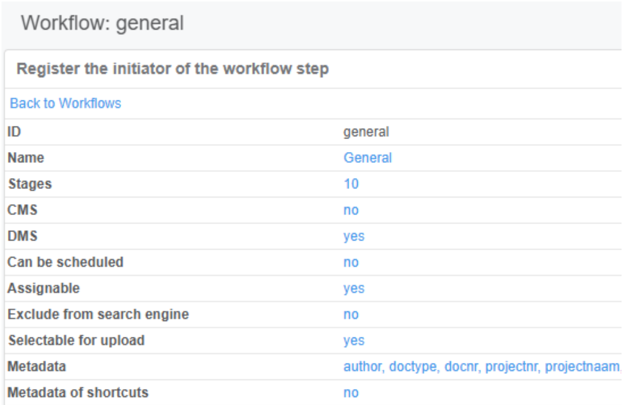
6.2 Characteristics of a workflow

A workflow consists of three parts:

1. General properties.
2. Permissions.
3. Stages.

6.2.1 General properties per workflow

The properties apply to the entire workflow and/or all documents that use the workflow. An OpenIMS workflow has the following general properties:



Workflow: general

Register the initiator of the workflow step

Back to Workflows

ID	general
Name	General
Stages	10
CMS	no
DMS	yes
Can be scheduled	no
Assignable	yes
Exclude from search engine	no
Selectable for upload	yes
Metadata	author, doctype, docnr, projectnr, projectnaam
Metadata of shortcuts	no

ID This is the internal ID of the workflow, as addressed within OpenIMS.

Name The visible name of the workflow, as displayed within OpenIMS.

Stages This is the number of stages a document or web page can be in.

CMS / DMS If Yes, the workflow is available within this product.

Can be scheduled If yes, scheduling (visible from and visible to in the metadata) is available for web pages in the relevant workflow of the CMS.

Assignable Provides the ability to assign documents/pages to a specific person.

Help link (optional) If activated, this option is visible. You can specify a hyperlink here. This link can, for example, lead to a web page or PDF document with an explanation of this workflow or work process. The icon with the link will then appear in the DMS under the workflow options to support the user.

Exclude from search engine Option to prevent the documents from the relevant workflow from being indexed by the search engine, so that they cannot be found by the search engine by default.

Selectable for upload Option to select or not select the workflow when uploading documents.

Metadata This defines which metadata fields are visible in the properties screen of a document/page. See Chapter 10 Fields.

Metadata of shortcuts As soon as a shortcut has its own metadata, the shortcut gets its own Properties screen for this metadata. The standard Properties screen used to edit the source document will no longer be available.

6.2.2 Permissions per workflow

Workflow permissions are set by configuring groups per permission.

view Permission to view all versions of a document/web page.

viewpub Permission to view the last approved version of a document.

docviewhistory Permission to view the read history of a document.

delete Permission to delete a document/web page.

deleteconcept Permission to delete the draft version of the document/web page.

move Permission to move a document/web page.

newpage Permission to create a new web page below the current web page.

reassign Permission to modify an assignment (reallocate).

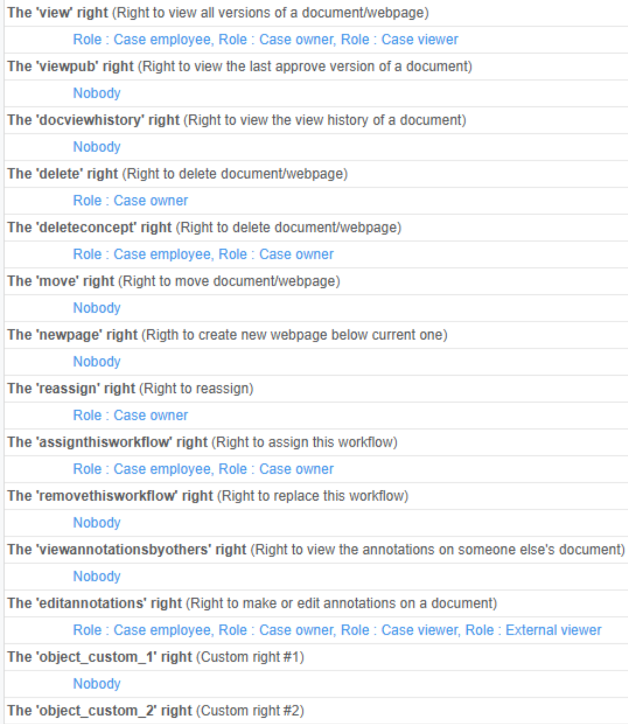
assignthisworkflow Permission to assign this workflow.

removethisworkflow Permission to replace this workflow.

viewannotationsbyothers Permission to view annotations on a document by another person.

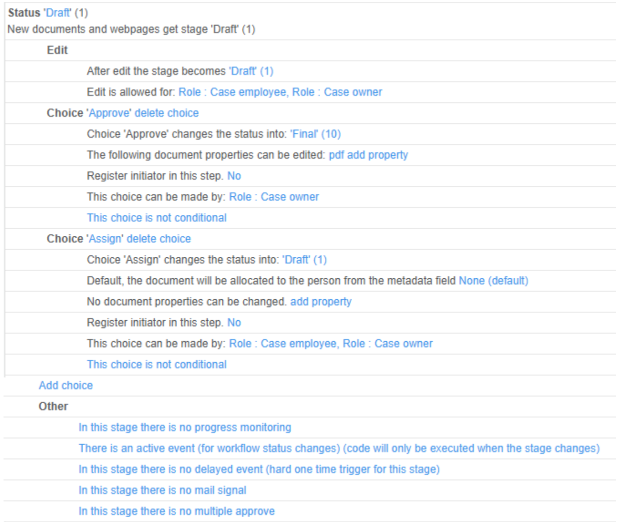
editannotations Permission to create/modify annotations on a document.

object_custom_1 through 5 Right to introduce customization regarding rights on the workflow.



6.2.3 Settings per workflow status

Groups can be assigned to the Edit actions and Choices. The details can be configured; see section 6.3.



Status In section 6.3.4 Workflow stages, the number of stages of a document is defined. For example: review, edit.

Edit In every status, a document can be modified. If no groups are assigned to the Edit function, a document cannot be modified in this status, for example, status: review. You can specify per status which user groups are allowed to modify a document in that status. Additionally, you can specify to which status the document must transition if it is modified.

Choice In a specific status, various choices can be defined. This means that different user groups can move a document to different stages. A user is only shown the choices for which they are authorized.

Progress monitoring Here you can define how long a document may remain in a specific status. This allows you to monitor progress.

Active event Option to start specific application code upon transitioning to another stage.

Delayed event When a document reaches this status, this application code is executed with a one-time delay.

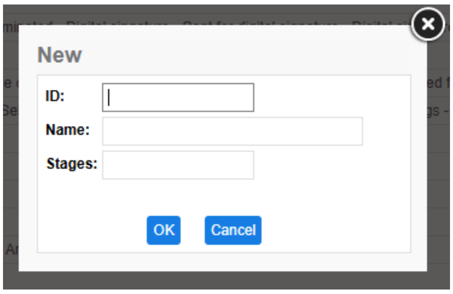
Mail signal Option to send a notification message to a fixed group of people (distribution list) upon a status change.

Multiple approval Option to have approval performed by multiple people before a workflow selection is finalized.

6.3 Creating and editing a workflow

This section explains how a workflow can be created and edited.

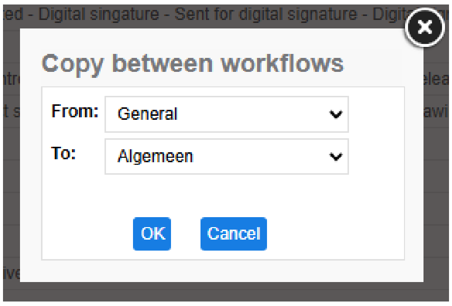
6.3.1 Creating a new workflow



You can create a new workflow using the **New** button. Here, a workflow ID, name, and number of stages can be entered. After confirming with **OK** a new workflow is created, which you can modify as you see fit.

You can also copy an existing workflow by clicking on **Copy between workflows**. Initially, the new workflow is exactly the same as the workflow from which you derived the new workflow.

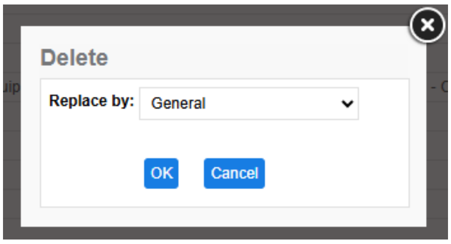
6.3.2 Replacing the content of a workflow



With this function, you can copy a complete workflow definition over an existing workflow.

You must first create a new workflow, then test it, and subsequently copy it over the old profile so it is available immediately.

6.3.3 Deleting a workflow

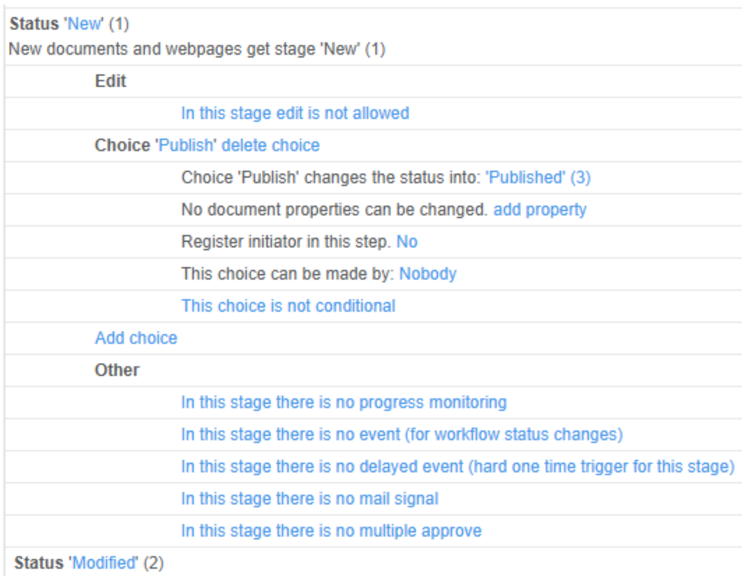


You can delete workflows, yet since documents or web pages usually already use the workflow, these documents must first be provided with a different workflow. After all, documents are always part of a workflow.

After you have clicked **delete**, an overview will be displayed of available workflows that can replace the workflow to be deleted.

It is therefore recommended that you determine which workflow you will use to replace the old one before deleting a workflow.

6.3.4 Workflow stages



The most important components of a workflow are the various stages that a document or web page goes through to eventually be published or archived.

The number of stages can be set using the workflow designer. For each stage, it can be determined who is allowed to modify the document and who is allowed to make certain choice(s) to move a document to another stage.

For example,
In a workflow with the following 3 stages:

- Status **New**.
- Status **Modified**.
- Status **Published**.

Within the **New** and **Modified** stages, user groups within the relevant case with the

Role: Case owner and **Role: Case employee** may modify the document and select **Publish**. Other groups, such as user groups with the **Role: Case viewer**, are not.

If a change occurs in the document while it is in the **New** or **Modified** stage, the document will automatically be set to the **Modified** status.

Choices can be freely defined by the administrator. Therefore, multiple choices can be made available. New choices can easily be added using the **Add choice** option.

6.3.5 Adding Metadata

In a workflow, under the general properties, you can assign metadata fields that apply to documents in the relevant workflow. These metadata fields are then directly (and dynamically) included in the properties screen of a document. To edit the metadata fields, click on the relevant link behind **Metadata** in the general properties of the relevant workflow that needs to be modified.

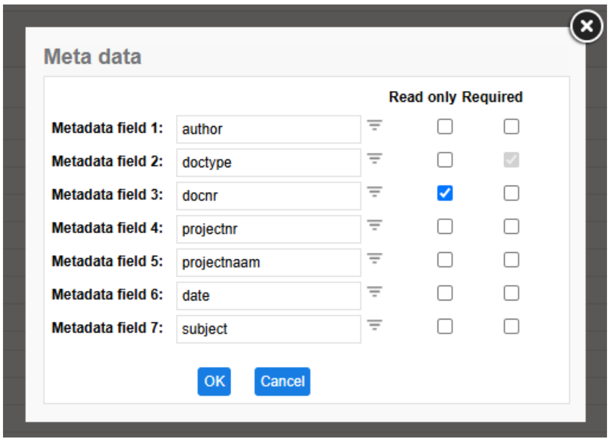
Subsequently, you can add, remove, and change the order in which metadata fields are displayed in the **Properties** of a document. Additionally, for each field, the **Read only** option can be used to indicate whether it can be edited by an end user or should only be displayed as a readable field. The **Required** option forces a value to be entered or selected when creating and/or modifying a document and creating a workflow step.

Metadata fields For each metadata field, a choice can be made from the created fields.

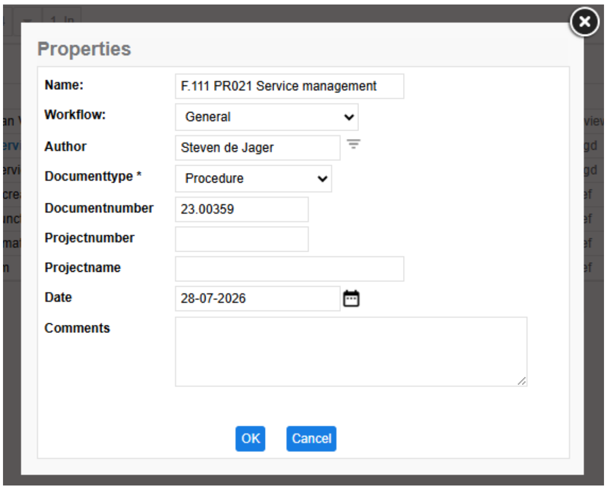
Read only When the Read only option is checked, the field in the document properties cannot be edited by the user, but can only be read.

Required When the Required option is checked, a value must be entered or selected at the first possibility.

Note: The fields available here are defined in the **Fields** section; this option can be found under the **Admin** menu (see Chapter 10).



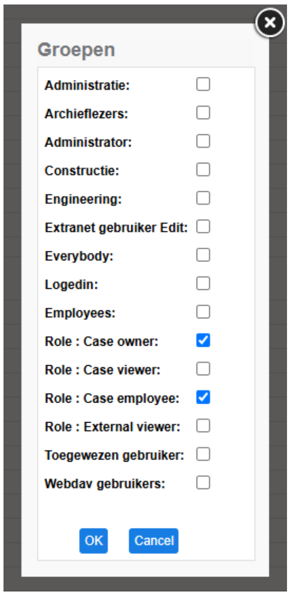
Metadata fields in the document properties The image next to this shows the properties screen of a document in OpenIMS DMS containing the metadata fields that were previously assigned to the workflow.



6.3.6 Special user groups

You can link different user groups to the permissions per stage. For the permission to modify a document/page, you can click on the option **In this stage edit is not allowed**. For the permission to make a choice, you can click on **Nobody** next to the option **This choice can be made by**. Once clicked, an overview of all available groups appears; the groups that were previously assigned are already checked.

If permissions have already been assigned for documents/pages, the text changes to **Edit is allowed for**, the relevant user group next to the text can be clicked to adjust the permissions. The text for a choice remains the same.

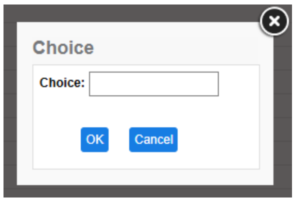


In addition to user groups and roles, there are also the following two special user groups, namely: **Everyone** and **Logged In**. The group **Everyone** refers to all users, with or without an account. This user group is assigned to, for example, a web page, so that it is accessible to all visitors of a website. **Logged In** refers to everyone with a login account. So, for example, web pages that require logging in (Intranet or Extranet).

6.3.7 Permissions (assigning user groups)

The example shown here displays a dialog where 2 groups (roles) are configured. The available groups are shown in this dialog. This allows multiple groups to be configured in workflows for the options **Edit** or **Choice**.

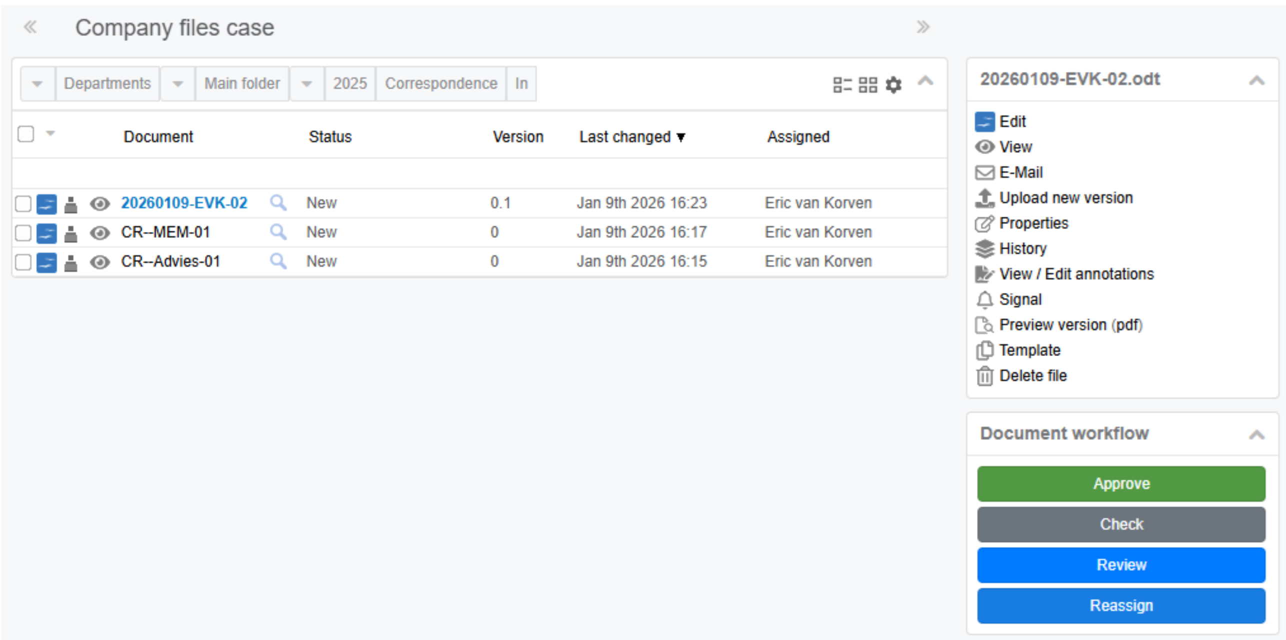
6.3.8 Adding choices



A number of choices can be assigned to each stage. Each choice has a **Name** and indicates which groups can make this choice. By clicking on **Add Choice**, new choices can be added. The example shown here displays a dialog for creating a new choice.

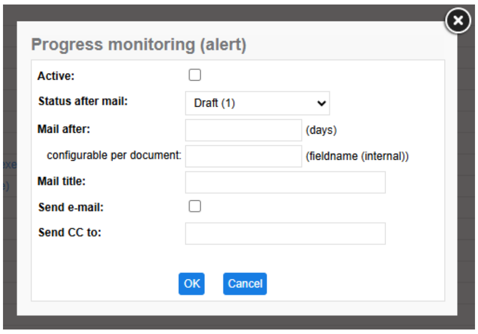
Configured choices and visibility for documents
Configured workflow choices can be found in the DMS under the **Document workflow** section at the bottom right when a document is clicked. The displayed workflow choices depend on the configured choices and the rights of the relevant end user. In the list of documents, you can view the **status** for each document; this displays the current stage of the workflow in which the document resides.

In the screen below, the status of the document is **New**, and at this stage, the workflow choices are **Review**, **Check**, **Approve**, and **Reassign**.



6.3.9 Progress Monitoring

You can set up progress monitoring for every status a document can be in. Progress monitoring offers the following options:



Active With this option, this reminder function is enabled or disabled.

Status after email Here you can set the status to which the document should be moved after the specified period has elapsed. For example, you can automatically set a document to a status like escalation or overdue.

Mail after (in days) Here you can define the number of days after which the reminder function is started.

Configurable per document (field name (internal)) Here you can change the default number of days from the workflow for a specific document via a metadata field associated with the document. This metadata field, for which you must specify the internal value here, must be of the text or drop-down list type and contain a number (for the number of days).

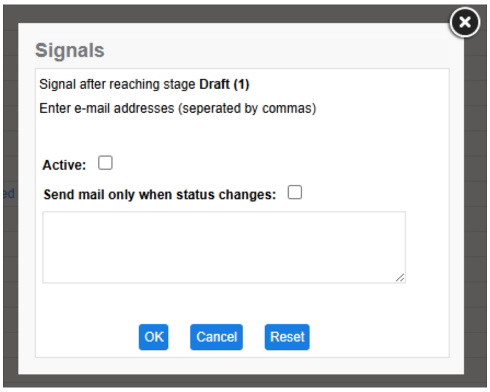
Mail title This is the text that is placed in the Subject field of the email message sent to the assigned person.

Send e-mail Activate or deactivate sending the notification by email.

Send CC to Option to send an additional CC message to another department or manager. The email addresses must be entered separated by commas in the input field.

6.3.10 Mail signal

With alerting, an automatic OpenIMS signal is sent to the specified email addresses upon reaching this stage. The email addresses must be entered separated by commas in the input field. The mail signal has the following options:



Active You can activate and deactivate the mail signal.

Send mail only when status changes If selected, alert email messages are only sent upon stage changes of the document.

6.3.11 Defining Events

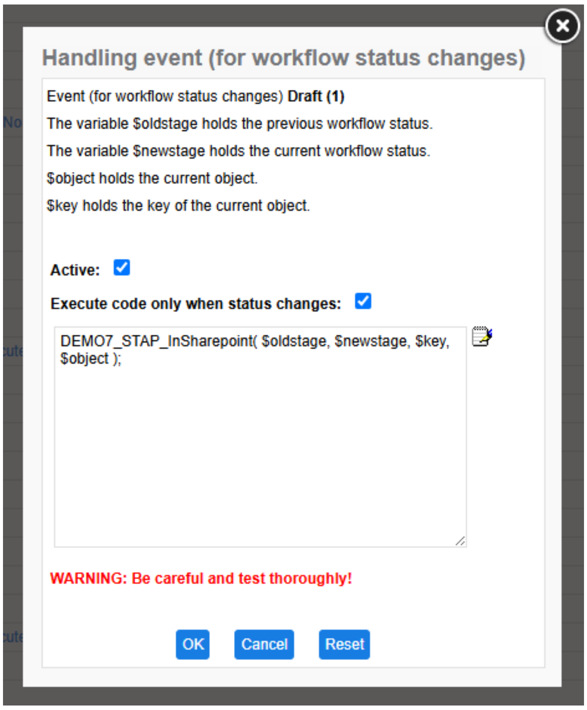
Events are not intended for use by administrators but are designed to execute specific PHP programming (customized) code. When an event occurs, custom functionality can subsequently be executed based on certain conditions.

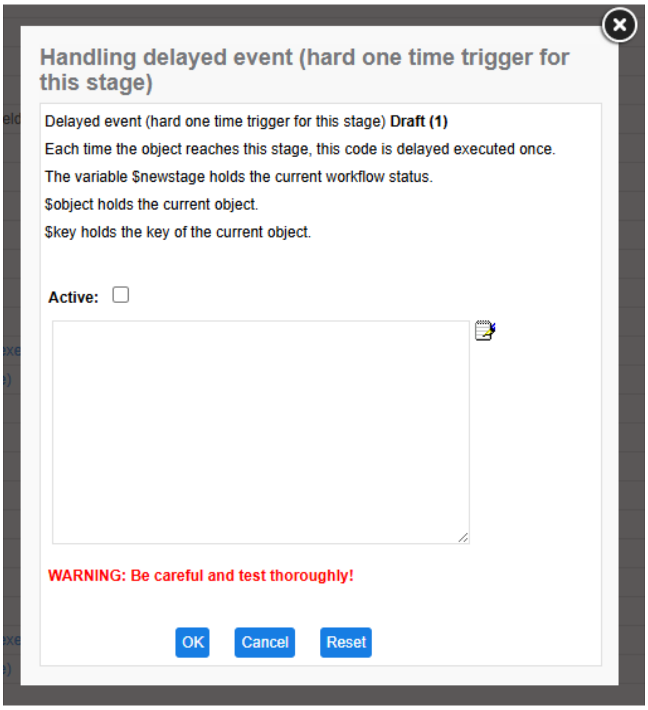
There are two variants for events:
- Active events upon execution of a workflow action.
- Delayed events for reaching the stage.

An event has the following capabilities:

Active You can enable or disable the execution of the event.

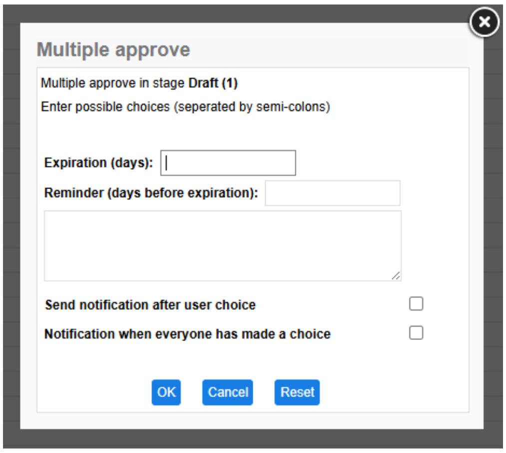
Execute code only when status changes If selected, the customization is executed.





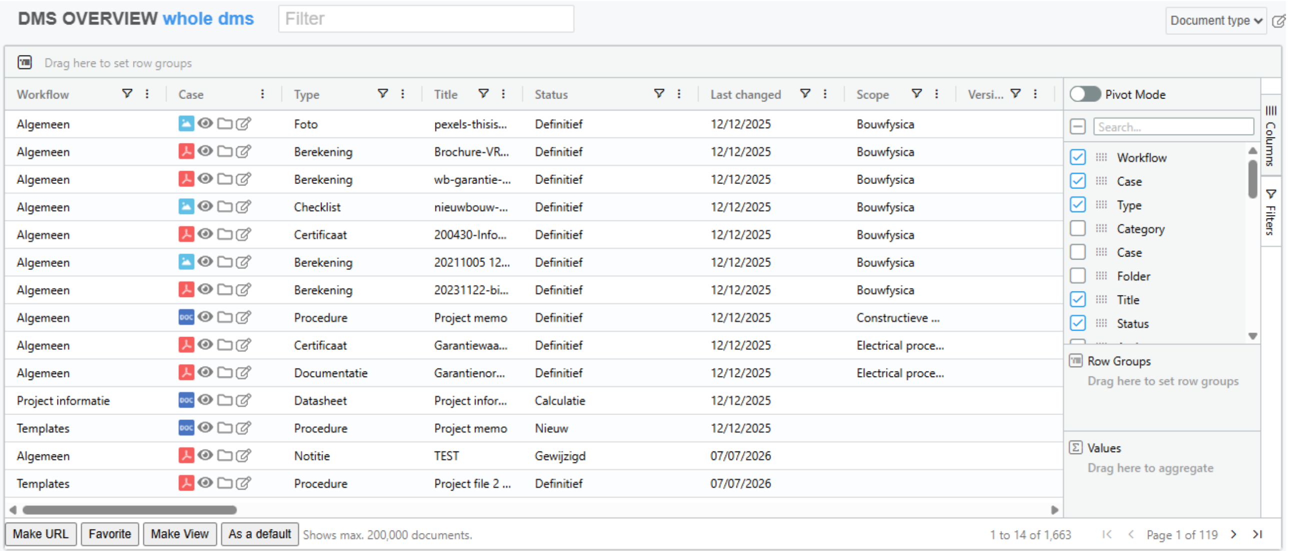
6.3.12 Multiple approvals

Multiple approvals are not intended for use by administrators but is designed to execute specific PHP programming (customized) code. With multiple approvals, custom functionality can subsequently be executed based on certain conditions.



7 OVERVIEW

If configured, there is a provision for administrators and optionally end users to gain insight into documents as they are present throughout the entire DMS, delimited by casetypes and optionally custom views. If Overview is enabled in your DMS instance, access to Overview can be granted to administrators and end users.



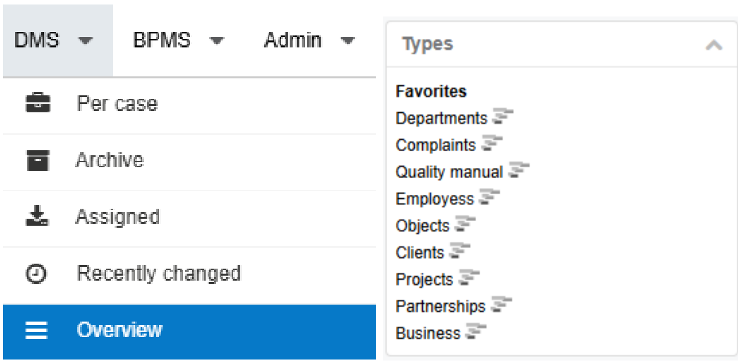
7.1 Configuration

Overview can be configured for end users as follows;

7.1.1 For all casetypes

Offer the **Overview** option in the **DMS** menu in combination with all casetypes under the **Per case** option. This option can be set by assigning the right **overviewsys** to an **Admin > Groups** group; this is the right to use the overview function, which grants access to all document names.

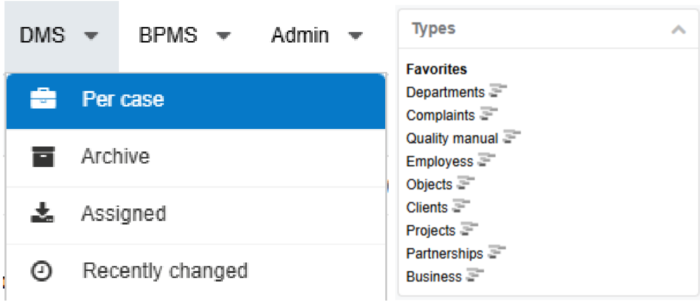
Authorized users will thus find Overview under the menu **DMS > Overview** and behind each casetype under **DMS > Per case**.



7.1.2 For selected casetypes

Offer Overview in combination with selected casetypes under the **Per case** option. This option can be configured by assigning the **Overview** right to an **Admin > Groups** group; this is the right to the Overview function. For this option, it must subsequently be specified which casetypes are allowed to display Overview. As an administrator, this can be configured under the menu **Admin > Casetypes**. In the **Overview** column, you can configure the groups within your organization that are allowed to use **Overview** for the relevant casetype.

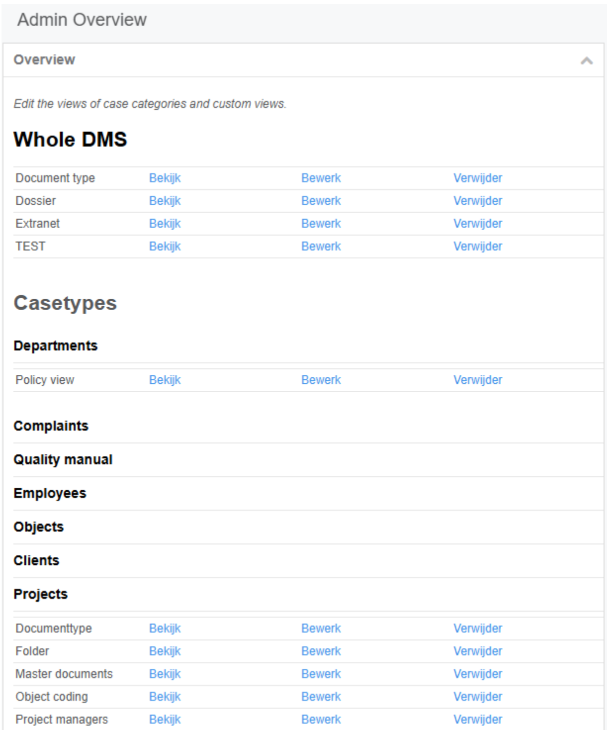
Authorized users will find Overview under the **DMS** menu and then the **Per Case** menu option. If the icon is present next to a casetype in the list of **Types**, the user in question can start Overview with a view limited to documents from that casetype.

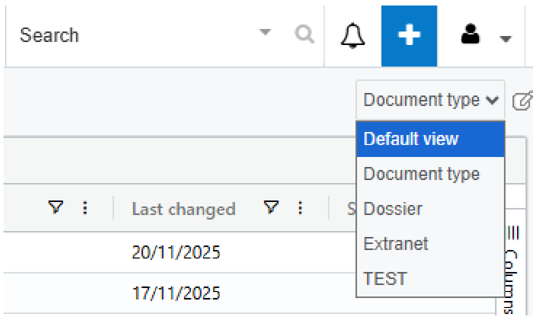


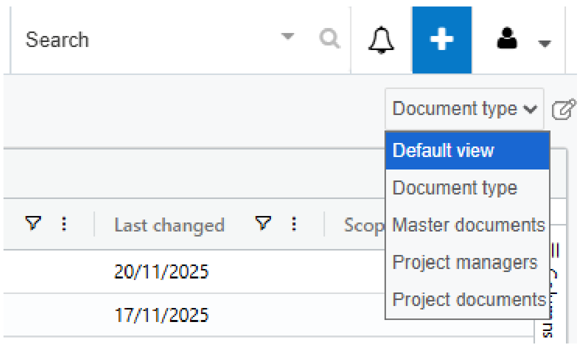
7.2 View and Scope

As an administrator, available views can be viewed, the name of a view can be changed (Bewerk), and a view can be deleted (Verwijder). To do this, there is a page under the menu **Admin > Overview** where available views can be viewed by clicking on **Whole DMS**, a **Casetype**, or **Scope** within a casetype. For views and scopes, you can also click on Bekijk (View).

A view can be created from within Overview itself using the **Make View** button. After creation, it will appear in the **Default View** list (image below right). Options for this are available to administrators under **Admin > Overview** (image below left). The name of a view or scope can be changed (Bewerk). A view or scope can be deleted (Verwijder).





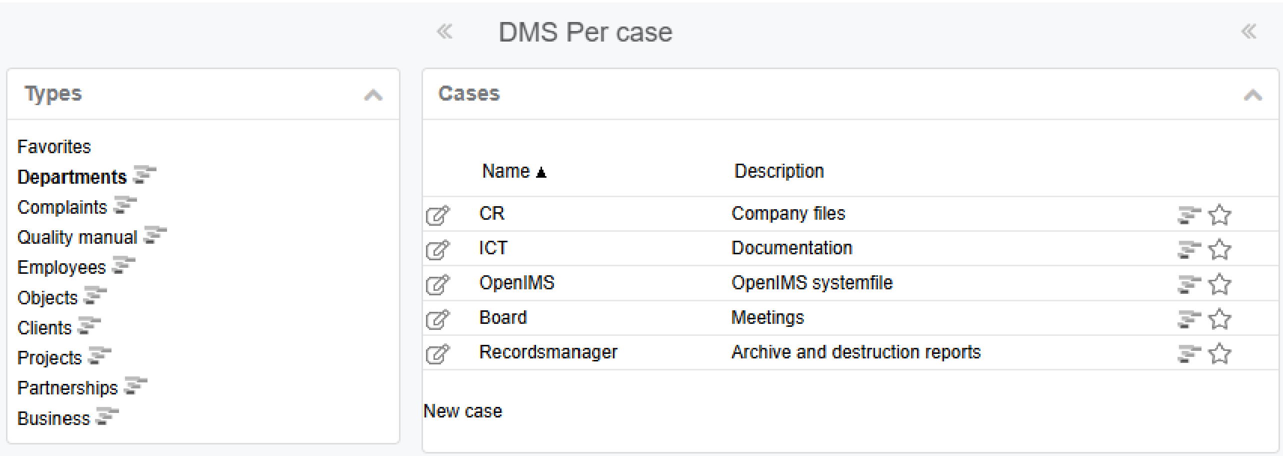


7.3 Permissions and visibility

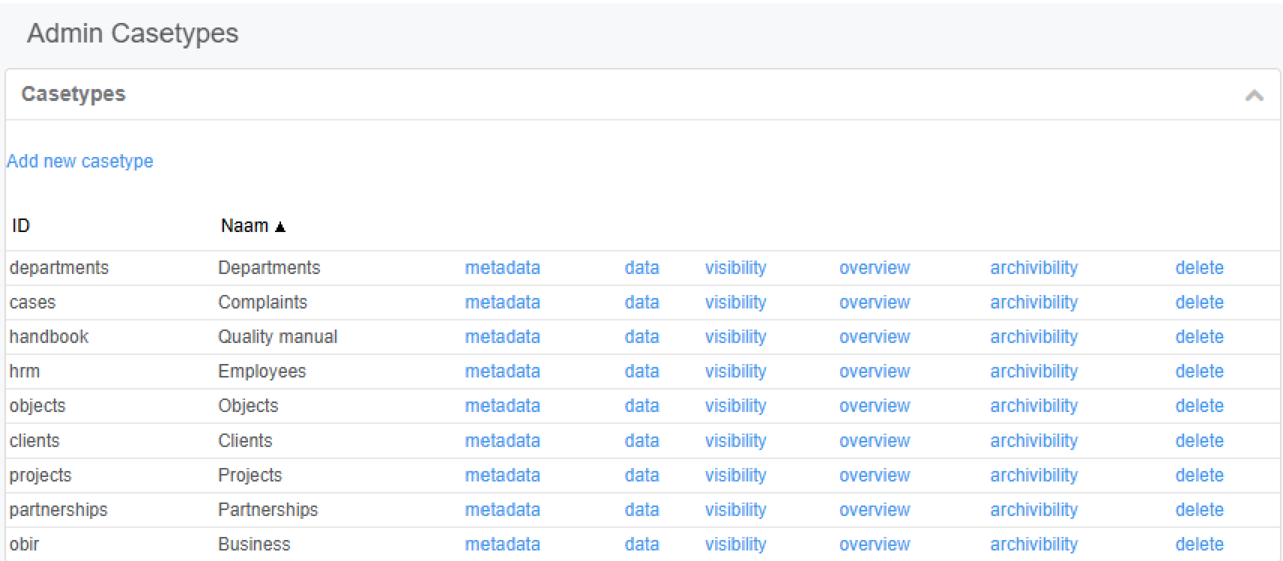
Please note that while Overview takes into account the rights regarding viewing and modifying a document, it does not consider the visibility of the document name and metadata. Customization is required to exclude these aspects if deemed necessary.

8 CASETYPES

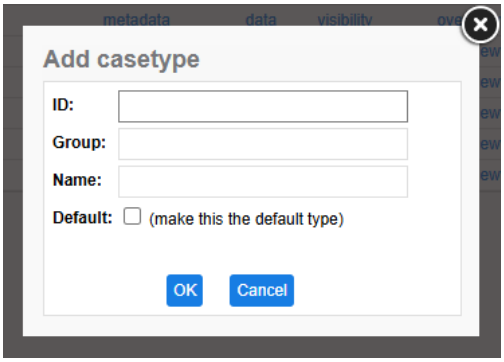
If configured, a feature is available to manage casetypes. With casetypes, it is possible to divide the **Per Case** component within the DMS into multiple casetypes, presented to the user in the **Types** block.



In the Admin management environment, new casetypes can be created and existing types can be modified or deleted.



A new casetype can be created by clicking on **Add new casetype**. An ID must be entered in the displayed pop-up window (this cannot be changed afterwards). A group adds casetypes to the same group; this is optional. The **Name** refers to the visible name for end users in the DMS. Please note that there should always be one **Default** casetype. This must be checked for the relevant casetype.



Visibility can be assigned to the standard available user groups and exclusively ensures the visibility of the relevant case category in the **Types** component of the DMS.

With **Overview**, the **Overview** component can be assigned to the standard available user groups; see Chapter 7 for this.

9 DATA AND PROCESSES (BPMS)

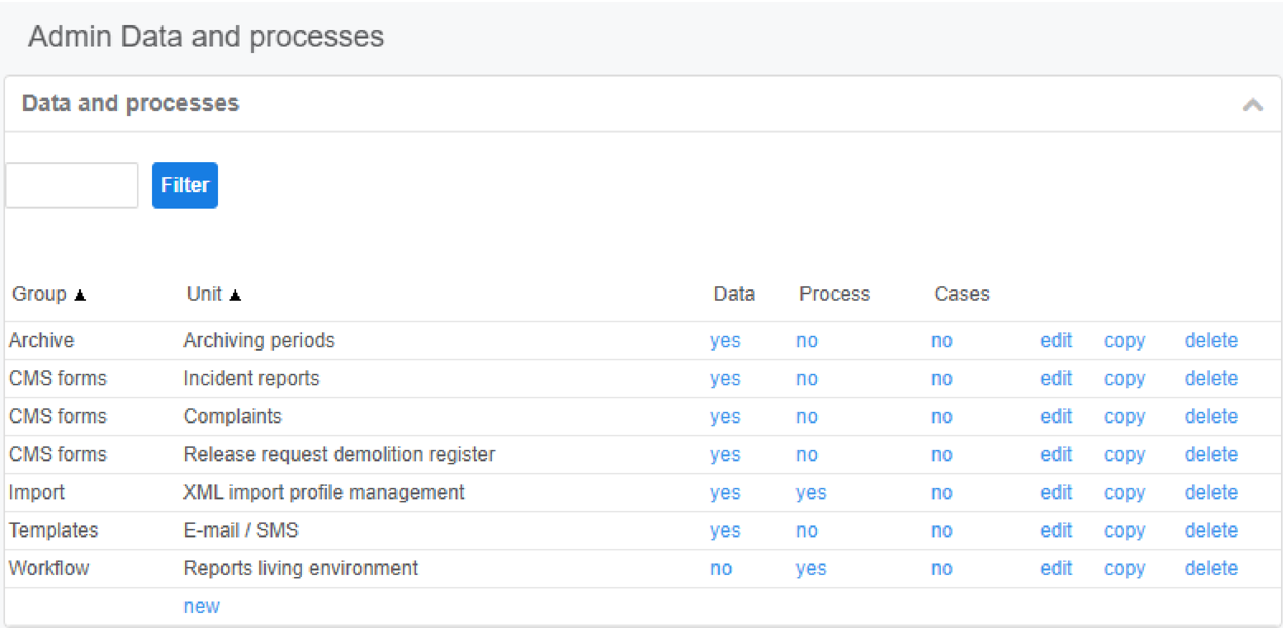
With the BPMS, data can be managed using web forms and processes. Behind the scenes, the BPMS actually functions as a relational data model with linked tables.

This makes the BPMS extremely suitable for developing complete applications on the OpenIMS platform. These applications can then be deployed in combination with other applications from the suite, for example with the DMS and the CMS. Examples include CRM applications, HR applications, Case-based working, Task-based working, EHRs, etc.

Business processes in the form of form flows include, for example: requesting leave days or study facilities, a job application procedure, an application to the municipality, or following a treatment process at a healthcare provider.

9.1 Overview of the management environment

From the Admin environment, you can select the **Data and processes** option.



Group ▲	Unit ▲	Data	Process	Cases			
Archive	Archiving periods	yes	no	no	edit	copy	delete
CMS forms	Incident reports	yes	no	no	edit	copy	delete
CMS forms	Complaints	yes	no	no	edit	copy	delete
CMS forms	Release request demolition register	yes	no	no	edit	copy	delete
Import	XML import profile management	yes	yes	no	edit	copy	delete
Templates	E-mail / SMS	yes	no	no	edit	copy	delete
Workflow	Reports living environment	no	yes	no	edit	copy	delete
	new						

With this screen, you can see which processes are available, edit the processes, copy them (create a new profile based on an existing process), or delete them. The **Group** classification allows you to group specific processes.

9.2 Properties of a data and process profile

A data and process profile can be divided into a number of components, namely:
- General.
- Permissions.
- Data access.
- Process structure.
- Process specification.

9.2.1 General

Group Name of the entire application if necessary (data management).

Name Name of the individual process or data table.

Term for records (singular) Name for a record.

Prefix Unique predecessor.

Index Number (current value), is editable.

Next ID Combination of prefix and index resulting in a unique number (record ID).

Data access If enabled, a data table is accessible to authorized users.

Case generation Provides the ability to create a case in the DMS directly from the BPMS user interface based on the ID of the record.

Data / Process 'Archiveringstermijnen'	
Generic	
Group	Archive
Name	Archiving periods
Term for records (singular)	
Prefix	AT
Index	73
Next ID	AT73
Data access	yes
Case generation	no
Exclude from search engine	yes
Has process	no

Exclude from search engine This prevents the data and the process from being included in the search engine.

Has process Indicates whether a process is also available, see section 9.2.4.

9.2.2 Permissions

dataview Viewing form data in a process.

tableview Viewing form data in a data table; if valid, the user can view the table via the Data option.

processview Viewing all defined process stages of a process.

add Adding a record to a data table.

delete Deleting a record.

changestatus Changing a process stage of a form; available only to administrators.

The 'dataview' right (Right to view records (data))
Employees
The 'tableview' right (Right to view a table (data) directly)
Nobody
The 'processview' right (Right to view records (process))
Employees
The 'add' right (Right to add a record)
Nobody
The 'delete' right (Right to delete a record)
Nobody
The 'changestatus' right (Right to change the status of a record)
Employees
Advanced security for view (PHP) Advanced security for delete (PHP) Advanced form handling (PHP)

Advanced security for view (PHP) Provides the ability to deviate from the existing security model regarding the viewing of data and process data using a PHP script.

Advanced security for delete (PHP) Provides the ability to deviate from the existing security model regarding the deletion of data and process data using a PHP script.

Advanced form handling (PHP) Provides the ability to extend code based on prefix and postal code using a PHP script.

You can add user groups via the **Nobody** link by checking several user groups in the popup screen. Once user groups have been added, they will immediately become visible as links.

9.2.3 Data access

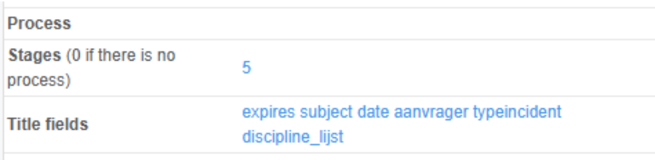
For each table, you can specify which fields (in the columns) should be displayed at the record level within the BPMS.

Title fields These are the fields displayed via the BPMS user interface when a user navigates to a table via the **BPMS** menu and **Data** option.

Form With this option, you can define which form should be displayed to a specific user group to view or edit the relevant record.

Table view with multiple users
In some applications, it is undesirable for certain user groups to be able to view or modify information about a record in a table. Therefore, you can add multiple forms per data table, linked to user groups, each with their own rights.

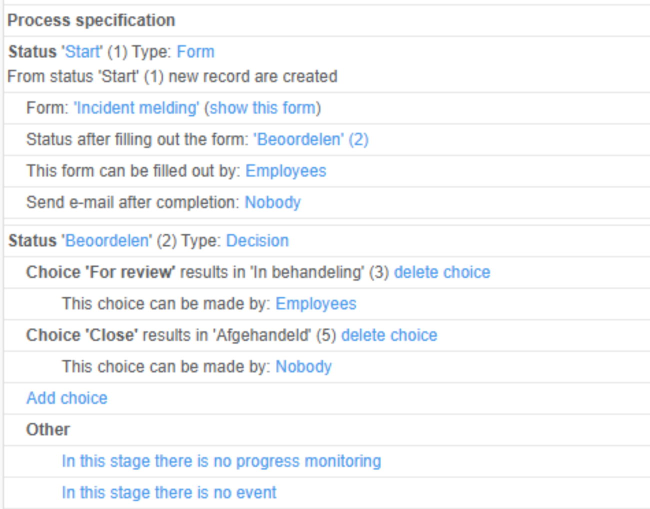
9.2.4 Process



Stages (0 if there is no process) Indicates how many stages a process consists of.

Title fields These are the fields that are displayed when a user views a process in the **BPMS** menu using the **Processes** option; see section 9.3.2.

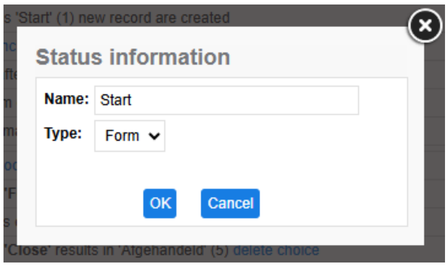
9.2.5 Process specification



In the process specification, the actual process is defined by setting several statuses.

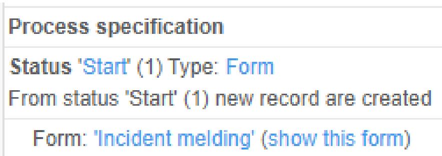
You can define different properties per status type; there are 3 status types:
- Form.
- Decision.
- Endpoint.

First status of the process Every process begins with filling out a form. This is therefore always a status of the form type. You can make a choice for all other statuses.



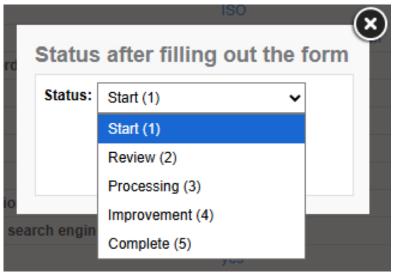
Status type: Form This status can only be exited after filling out a form selected here. You can specify to which status the form goes after it has been filled out and who is allowed to fill out the form. Each time the form is completed, a notification email is sent to the addresses entered for this purpose.

You can select a BPMS form from the list of created BPMS forms.

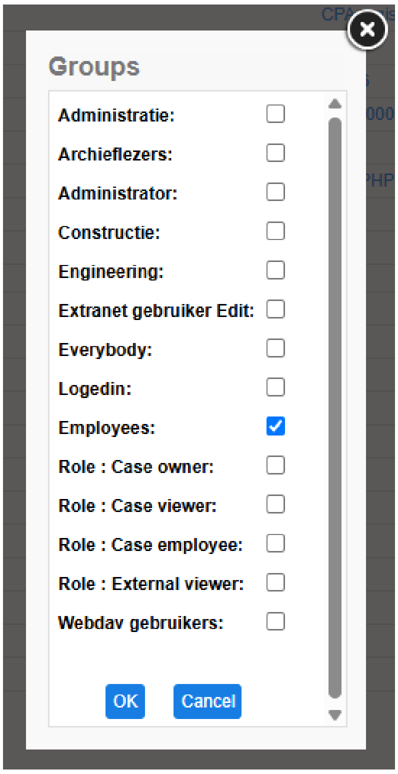


Viewing a BPMS form You can view the BPMS form via the option (show this form).

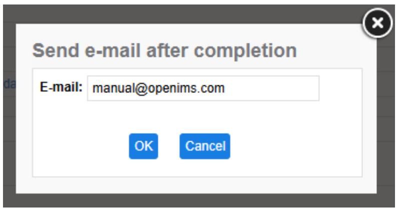
Status after filling out the form You can set what the status should be after completing the form.



This form can be filled out by You can set which user groups may view the form.



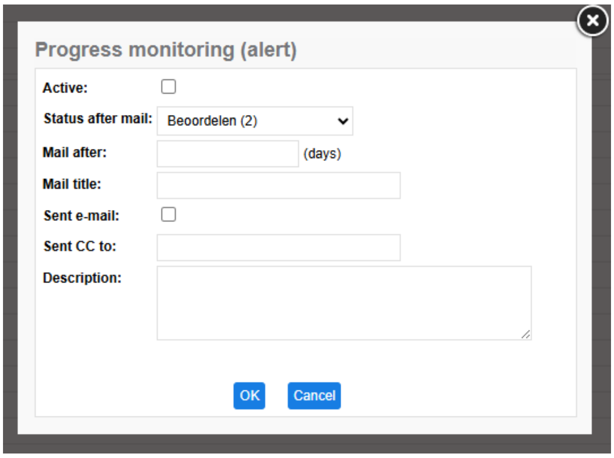
Send e-mail after completion An email address can be entered to which the content of the form will be sent.



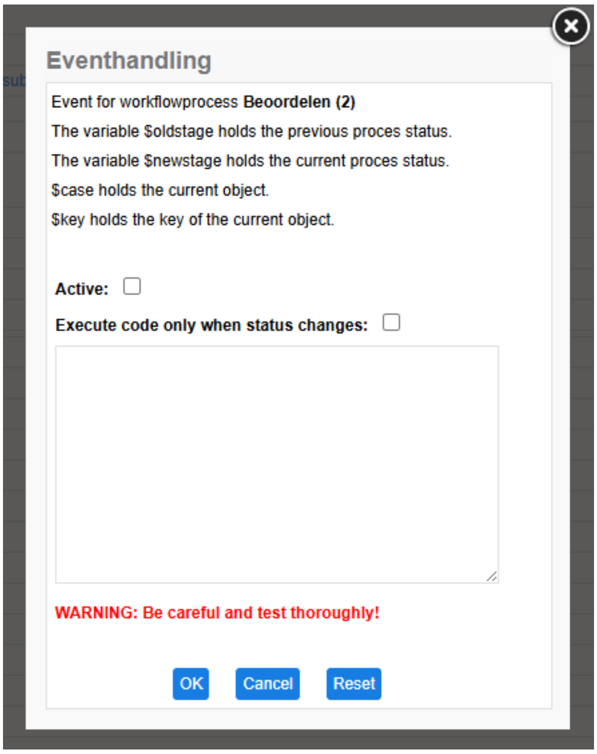
Status type: Decision If the Decision option is used, you can define which choices can be made and which user groups are allowed to make this choice. Each choice can lead to a different specified status. If you make a choice, you can assign the form to another person.

Choices are associated with a decision. Using the **Add choice** option, multiple choices can be specified for the user to select. For each choice, you can specify which user groups are allowed to make it. For each choice, you can specify the status to which the process should proceed once the choice has been made.

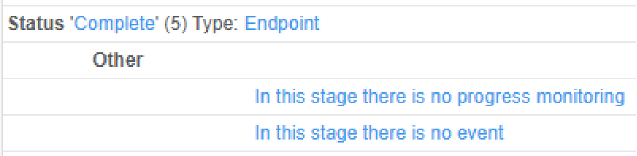
Progress monitoring For each status, it is possible to specify what should happen after a certain duration. This duration can be specified in days. An email can then be sent, and you can set a follow-up status.



Special handling It is possible to write specific code that must be executed when the stage is reached or exited.



Type: Endpoint Once a record is placed in this stage, it can no longer exit this stage, as no choices can be made. However, progress monitoring and programming an event are possible in this stage.



9.2.6 Process Model and Implementation Example

The process below consists of 5 different stages. The process is initiated by filling out a BPMS form.

(1. Start) After filling out the form, it proceeds to the next stage, in this case:

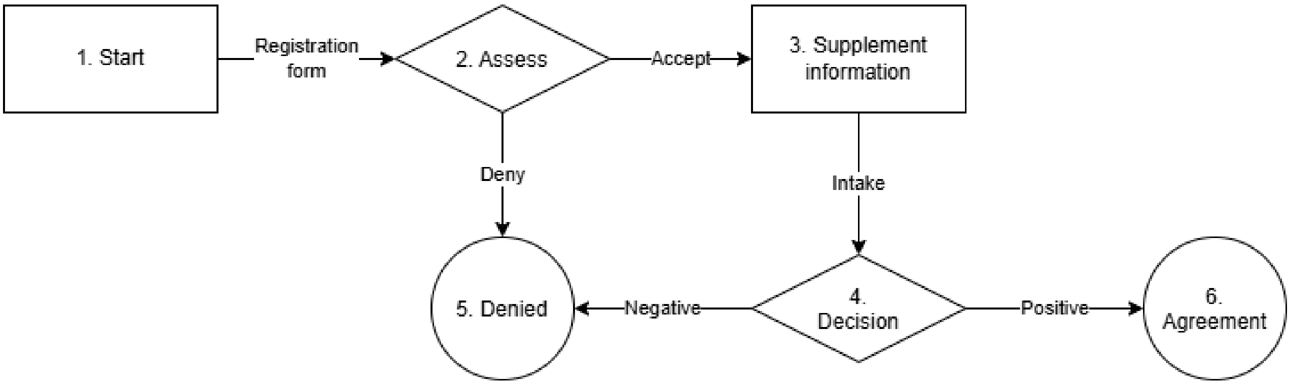
(2. Review) In the **Review** stage, you can indicate whether the form proceeds to the **Processing** stage or the **Complete** stage. The Complete stage is an endpoint

(5. Complete), and the process stops immediately there.

(3. Processing) In the **Processing** stage, you must verify the basic data and can supplement it with additional information. After you have saved the form, it is automatically guided to the next stage. In this case **(4. Improvement)**, where there are two choices: Positive/Negative, which ultimately leads to one of the two endpoints **(4. Improvement or 5. Complete)**.

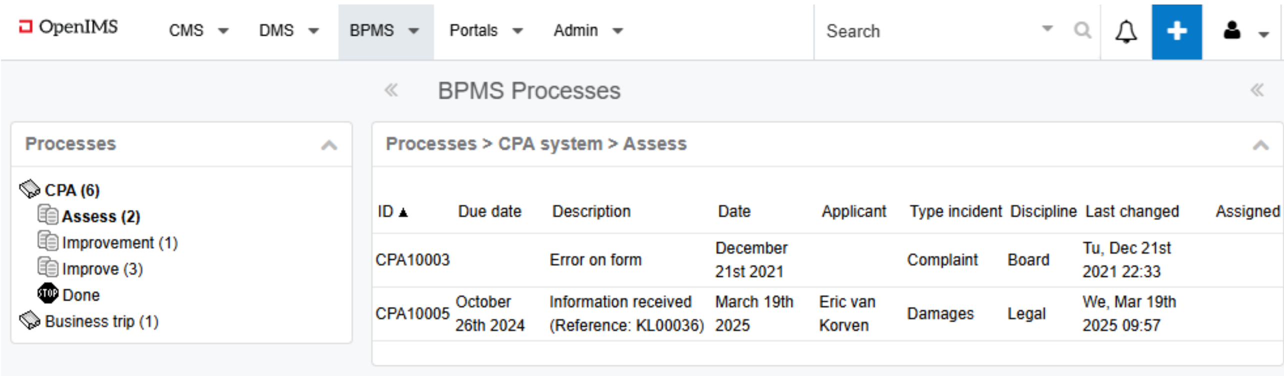
9.3 BPMS User Interface

The BPMS is a framework for developing web form applications that you make available to your end users. The following paragraphs discuss the BPMS user interface and serve as the basis for a BPMS-based application manual. Therefore, there is no specific BPMS manual for end users, as every application or process flow will be configured company-specifically.

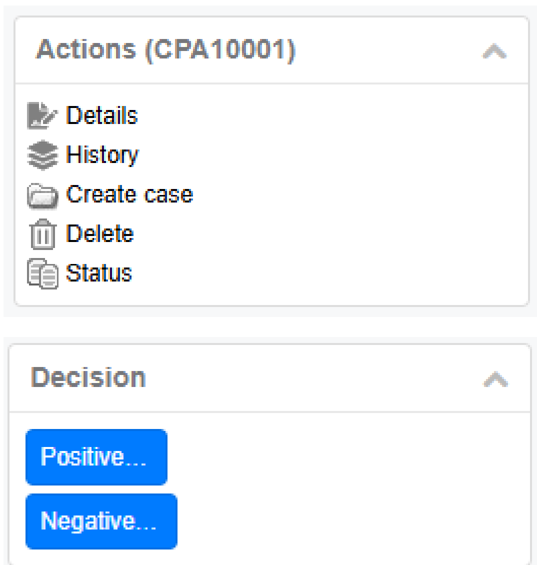


9.3.1 General Processes Functionality

Through this screen, the end user has an overview of the processes, the actions and decisions possible per item, and the various process statuses. When customization is involved, assistants are added to realize this functionality.



Actions



Details Via Details, the user can view the details of a form or fill out a form.

History Via History, the user can view the changes that have taken place in the form.

Create case Create a case in the DMS.

Delete This allows the document to be deleted.

Status Via Status, the user can change the status of an item.

Decision Assign, Process, Positive, Negative, and Move to Portfolio are examples of decisions the user can make after which the item is moved to another process status.

9.3.2 Processes overview and icons

If there are multiple processes to which the user has rights, these will also appear in the processes overview. The different stage types result in different icons within the process.

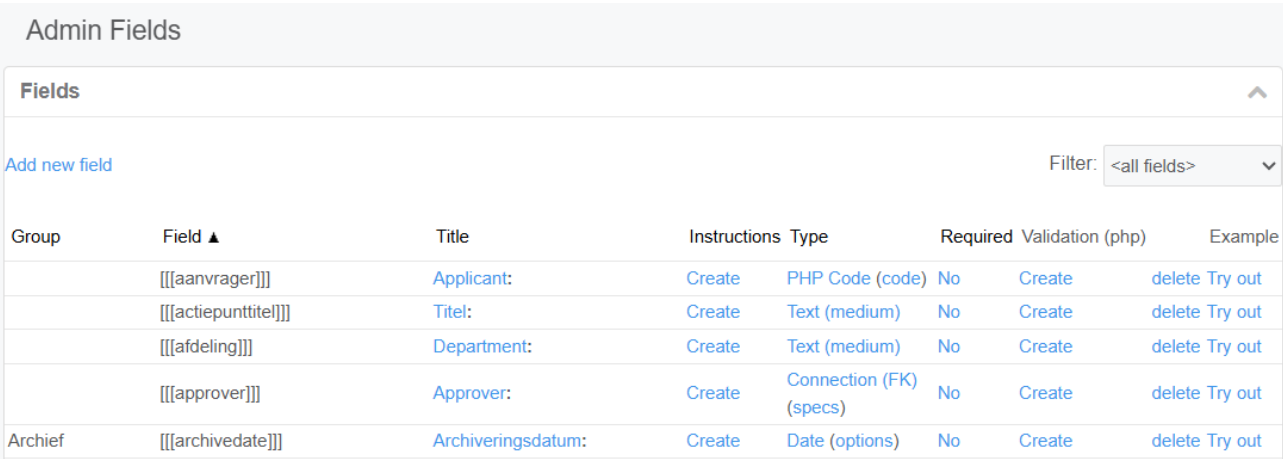
	Process.
	At this stage, the user must make a choice.
	At this stage, a user must fill out a form to initiate a stage change.
	If a form reaches this stage, the process is completed.

10 FIELDS

Within OpenIMS, all fields are managed at a single central location. You can then use the fields as metadata fields or form fields. The advantage of this is that you can define fields in just one place, and maintenance also takes place only here. When you make changes to a field, this change is immediately available within all OpenIMS applications that use this field.

10.1 Fields Overview

After selecting the **Fields** option under the **Admin** menu, the already defined fields are displayed. Each field has a number of standard properties, namely: Group, Field, Title, Instructions, Type, Required, and Validation.


Admin Fields

Fields

Add new field

Filter: <all fields>

Group	Field ▲	Title	Instructions	Type	Required	Validation (php)	Example
	[[[aanvrager]]]	Applicant:	Create	PHP Code (code)	No	Create	delete Try out
	[[[actiepunttitel]]]	Titel:	Create	Text (medium)	No	Create	delete Try out
	[[[afdeling]]]	Department:	Create	Text (medium)	No	Create	delete Try out
	[[[approver]]]	Approver:	Create	Connection (FK) (specs)	No	Create	delete Try out
Archief	[[[archivedate]]]	Archiveringsdatum:	Create	Date (options)	No	Create	delete Try out

Group If a set of fields belongs together, they can be categorized and filtered based on that.

Field This is the name of the field as it is used within OpenIMS.

Title This text is displayed to the user or visitor of the website. The title will be processed in an error message if it appears that a validation is incorrect or a required field has not been filled in.

Instructions Instructions displayed to the end user for a field.

Type Via type, it can be indicated which functionality is defined for a field. OpenIMS has the following field types: Text, Text block, Choicelist, Multiple choise list, Taxonomy, Yes/No, Date, Time, Hyperlink, Image, Cropped image, HTML, wysiwyg, Connection (FK), Connected list (MD), Date + Time, Composite object, Clone, PHP Code, PHP Auto, File (BPMS), File (CMS Form), Hidden.

The different types are described in chapter 10.1.1.

Required With this option, a visitor can be forced to enter a specific field.

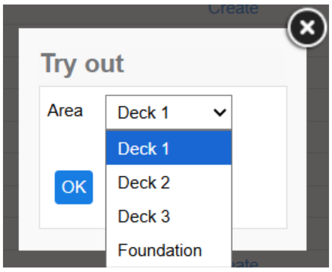
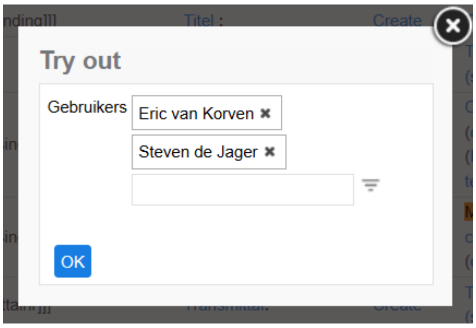
Validation (PHP) With this option, you can validate fields via a PHP script.

Example With this option, you can show a preview of the field.

10.1.1 Explanation of field types

Type Name	Description	Comments
Text	Free text. This concerns an input field that occupies a single line.	The field is defined to a single line; the user can choose between a small, medium or large text field.
Text block	Free text. This concerns an input field that occupies multiple lines.	The length of the field is defined over multiple lines. The user can choose between a small, medium or large text block.
Choice list	A list with various values. A user can choose from a list of defined options. The presentation (method) of this can also be defined, for a single choice: listbox, horizontal radiobuttons, vertical radiobuttons, other.	Additional explanation is included in chapter 10.1.2
Multiple choise list	A list with various values. A user can choose from a list of defined options. The presentation (method) of this can also be defined, for multiple choices: multiple choices, multiple choices vertical checkboxes.	Additional explanation is included in chapter 10.1.2
Taxonomy	Taxonomy field	With this field, a hierarchical structure can be defined. Additional explanation is included in chapter 10.1.3
Yes/No	The checkbox can be used, for example, for questions such as Yes/No.	
Date	Provides the option to enter a date.	Via options in the Type-column, it can be indicated whether the current date should be entered automatically.
Time	Provides the option to enter a time.	
Hyperlink	Provides the option to enter a link.	
Image	Insert an image.	
Cropped image	Adding an image that can be cropped by an end user.	
HTML	Insert a simple block of HTML code.	
wysiwyg	Free text. This concerns an input field containing multiple lines and offering limited formatting such as bold, italics, underline, inserting a link, and list formatting.	
Connection (FK)	Creates a selection field based on a value from a BPMS table.	Additional explanation is included in chapter 10.1.4
Connected list (MD)	A master detail field.	Additional explanation is included in chapter 10.1.5
Date + Time	Provides the option to enter a date and time.	
Composite object	Field that combines different field values into one field.	
Clone	Reusing an existing field. The content and behavior of this field are identical to the original.	
PHP Code	Field that PHP code uses to display or change a value and retrieves it from another (hidden) field.	
PHP Auto	Field that uses PHP code to display or change a value and retrieves it from the object.	
File (BPMS)	Provides the option to upload a file.	
File (CMS Form)	Field that allows a user to upload a file in a form.	

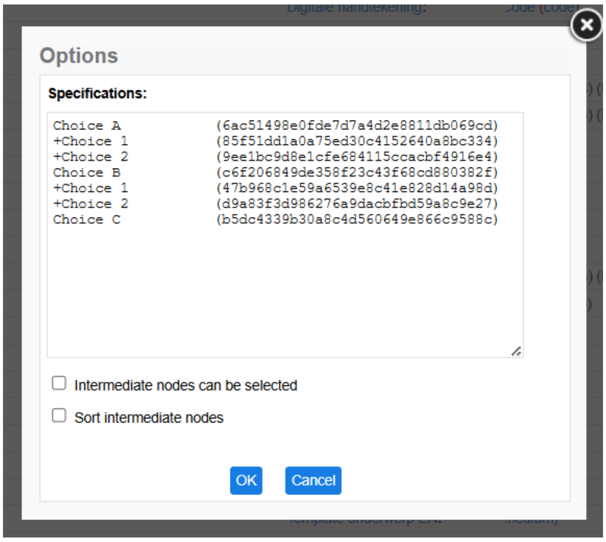
10.1.2 Explanation of selection list field

<table>
<tr><th>Type</th><th>Presentation</th></tr>
<tr><td>Choice list</td><td>
</td></tr>
<tr><td>Multiple choices</td><td>
</td></tr>
</table>

10.1.3 Explanation of Taxonomy Field

A hierarchical structure can be traversed using a taxonomy field. Example structure placement:

Choice A
+Choice 1
+Choice 2
Choice B
+Choice 1
+Choice 2
Choice C
And so on.

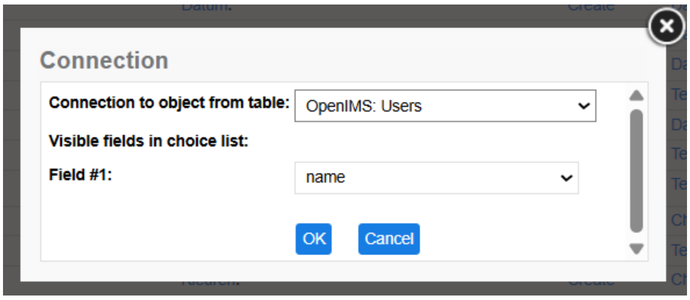


As can be seen, the entire hierarchy can be defined. Any sub-levels are created by placing a + sign. For instance, in the example, the Choise 1 is a sub-level of the Group above. After clicking **OK**, OpenIMS will assign IDs to these values.

Adding a new value is simple. The editor is text-based; you position your cursor before the value between which you want to insert the new value and press <enter>. After clicking **OK**, OpenIMS will also assign a new ID to the value.

An end user can immediately see under which items sub-levels are available and under which they are not. If the user selects Group, the underlying sub-items will be displayed. A taxonomy is not limited in the number of items or levels. By adding an extra +, you can easily introduce a new sub-level.

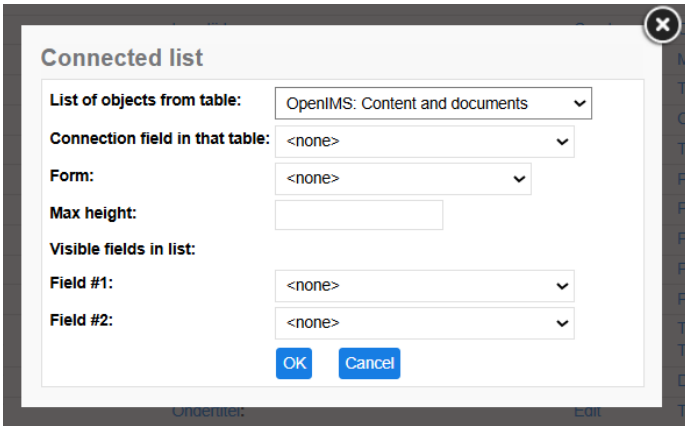
10.1.4 Explanation of Linking FK (Foreign Key) Field



An FK field is used to establish a relationship between data. This manual assumes that the reader is familiar with this type of database-related terminology.

The administrator can specify which BPMS table the field should be linked to. Additionally, they can define the content of the selection list. Naturally, these must be the fields that are also present in the relevant BPMS table.

10.1.5 Explanation of MD Field (Master Detail)

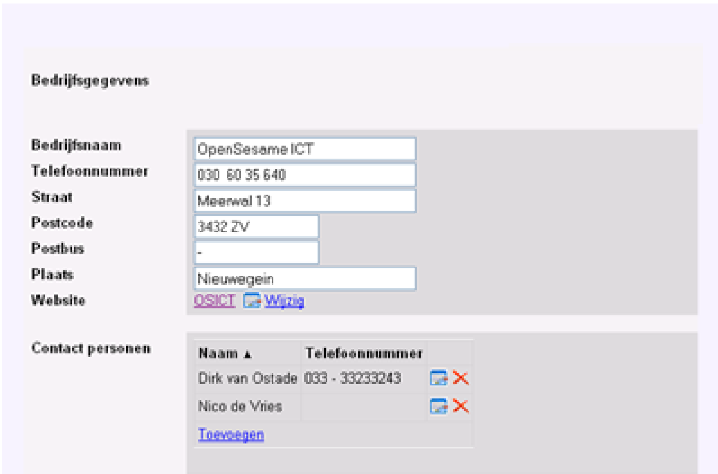


You can use a master detail (MD) field within a BPMS form. This manual assumes that the reader is familiar with this type of database-related terminology.

Within the BPMS form, an overview of related items from another BPMS table is displayed. You can think, for example, of a company form containing an MD field that displays all employees of the company in question.

You specify from which BPMS table the related data should be retrieved. Using the Link field, you specify the corresponding link field (the foreign key) and the form you want to use to process the data of the related element.

The fields to be defined are displayed in the MD screen. In the example shown here, a BPMS form is shown containing an MD field that shows contacts.

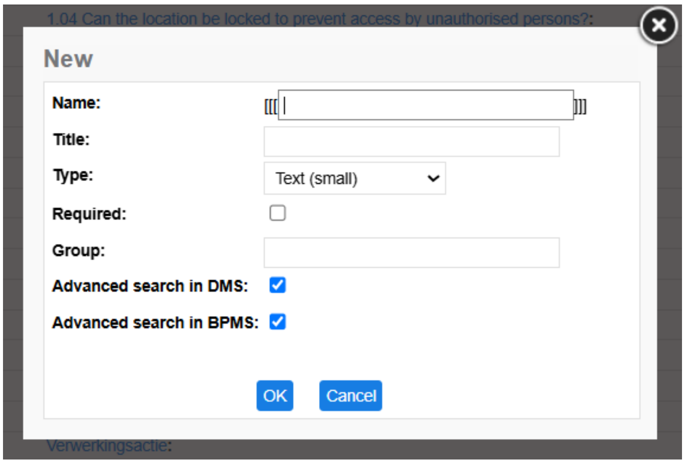


10.2 Adding a field

Step 1 Click on **Add new field**. A dialog box will then open.

Step 2 Enter the field name, title, type, if it is a required field and belongs to a group. You can also indicate whether the field is available via the OpenIMS advanced search screen or not.

Step 3 After clicking the **OK** button, the new field is created. The field is then operational and can be used within OpenIMS.



10.3 Editing a field

Naturally, all fields can be modified; this means you can make changes afterwards. The change takes place in a central location and is immediately applied to all places where this field is used (in forms, documents, properties, and content).

10.4 Linking fields (metadata) to documents

To use these fields as metadata for a document or web page, the administrator must link them to a workflow. To do this, the administrator must navigate to the **Document Workflows** section via the Admin menu.

The administrator can define a specific set of metadata per workflow. See section 6.3.5 (Adding metadata) for details. The user must link the correct workflow to the document in order to populate the correct metadata fields.

10.5 Linking fields (metadata) to web content

See section 18.7 (Linking metadata fields to a CMS template). As an administrator, you can choose whether metadata fields are linked to a web page via a workflow or at the template level.

10.6 Linking fields to web forms

See the manual **User Manual OpenIMS EE CMS**, which covers this topic. You can find this document at https://doc.openims.com/.

10.7 Grouping fields

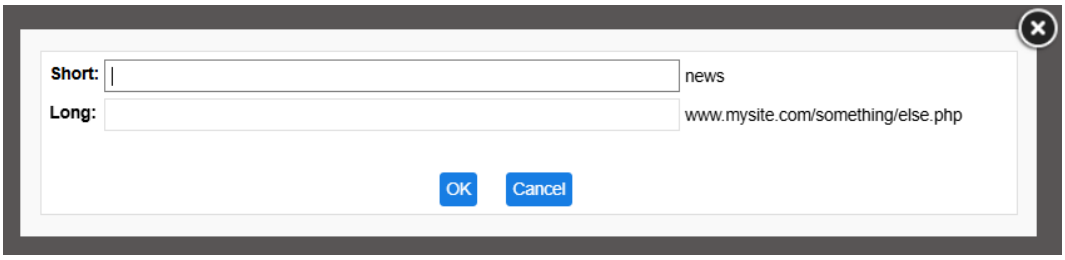
When creating a field, you can enter a group. This allows you to group specific fields in the **Fields** section of the admin menu. You can create such a grouping per form, for example. The field overview includes a filter option that allows you to select the fields of a specific group.

11 SHORT URLS

You can define short URLs for parts of a website or intranet that are frequently referenced. You can think of this, for example, as a job board within your website.

<Your site name>/<short URL>, for example https://www.openims.com/jobboard

It is also possible to include a document address as the address of a web page. In principle, you can add a reference to any web page or document accessible within OpenIMS.



With the short URL functionality, you can define these shortened names yourself. It is possible to incorporate existing domains into this. Enter the short name in the **Short** field. Enter the original URL being referenced in the **Long** field. The moment the short URL appears in the list, it is active.

This short URL might look like this, for example:

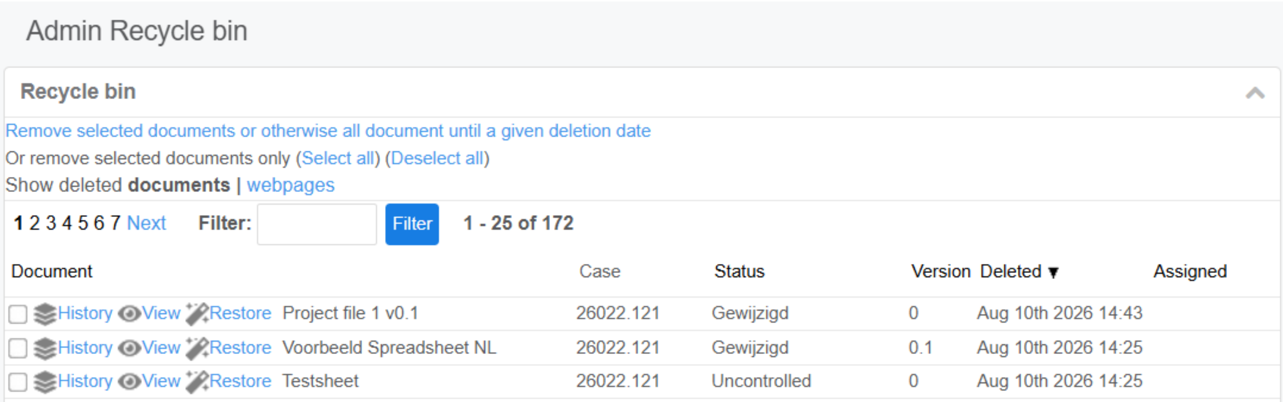
- https://your-site-name/jobs/developer/senior

You therefore have complete freedom in defining the short URL. You must provide the long URL in full, for example:

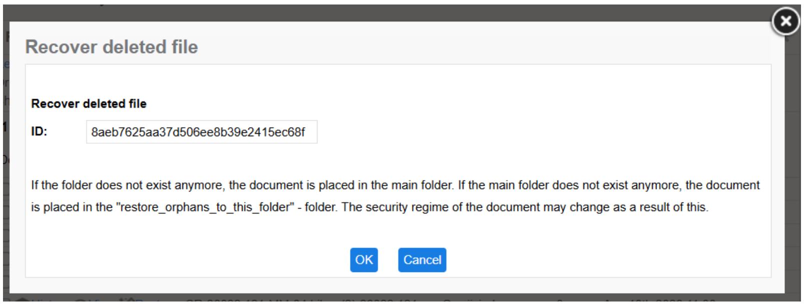
- https://www.mysite.nl/something/somethingelse.php

12 RECYCLE BIN

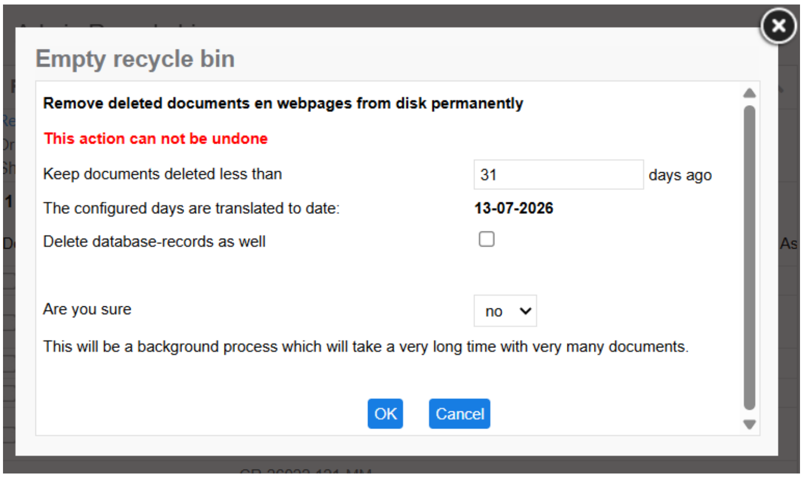
An overview of all deleted documents and/or web pages is available in the recycle bin.



For each deleted document and/or web page, the history can be viewed or the content of the document or web page itself can be viewed. It is also possible to easily restore the page or document. If the folder no longer exists, the document is placed in the root folder. This may cause the security regime to change.

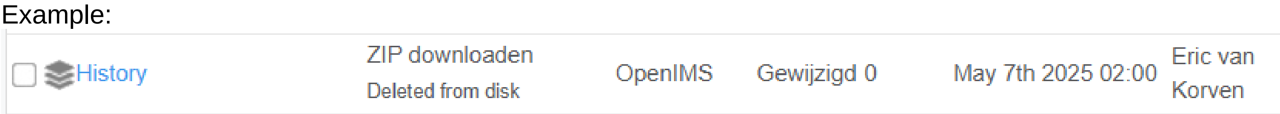


If configured, deleted documents and/or web pages can also be permanently deleted from OpenIMS (also from disk) using the option **Remove selected documents or otherwise all documents until a given deletion date**.



With this option, the documents and/or web pages are permanently deleted from OpenIMS and from the server. If the option **Delete database-records as well** is checked, the documents and/or web pages, including the history and metadata (the XML), are also removed from the overview. If this option is not checked, the documents and/or web pages remain in the overview without the history and viewing option, but with the indication **deleted from disk** added.

Example:



13 PORTAL SERVER (PS)

The portal administration environment consists of two parts. A **Portlets** management environment, within which portlets can be managed, and a **Portals** management environment, within which portals can be managed (in fact, multiple portals can be managed from the same library). Both parts can be found under the **Admin** menu. There are two types of portals: dynamic and static portals.

Portlets can be included in an OpenIMS or Google portal or included as a portlet on a web page within the OpenIMS Content Management product.

PS

Portlets

Portlet	Type	Required	Available to		
Categories	PHP	Portals	Groups	specifications	delete
Favorite cases	PHP	Portals	Groups	specifications	delete
Recently viewed cases	PHP	Portals	Groups	specifications	delete
My documents	PHP	Portals	Groups	specifications	delete
My links	Hyperlinks (free)	Portals	Groups		delete
My projects	PHP	Portals	Groups	specifications	delete
My project documents	PHP	Portals	Groups	specifications	delete
Recently changed documents	PHP	Portals	Groups	specifications	delete
Welcome	PHP	Portals	Groups	specifications	delete
DMS search	PHP	Portals	Groups	specifications	delete
	new				

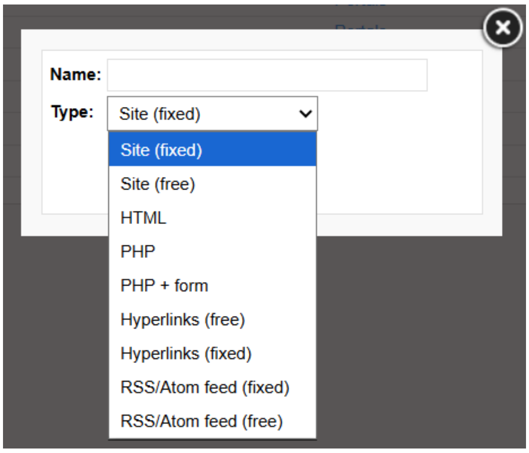
13.1 Portlets

Each portlet has a number of properties (see image). These are:

- Portlet
- Type
- Required
- Available to
- Specifications

13.1.1 Portlet types

You can create a new portlet via the **New** link. Subsequently, you can enter the name and choose the portlet type. After selecting the portlet type, the available features are displayed to configure and manage the portlet.



Site (fixed) Allows the display of a website within the portlet by registering the URL.

Site (free) Allows the display of a website within the portlet, where the user can fix the website's URL themselves.

HTML Portlet into which HTML code can be placed to populate the portlet's content.

PHP Portlet built using PHP code. Examples include displaying data from a database, assigned documents from the DMS, etc.

PHP + form Portlet built using PHP code. A form can be processed here.

Hyperlink (free) Portlet for the end user of the portal to create and edit their own list of links (favorites).

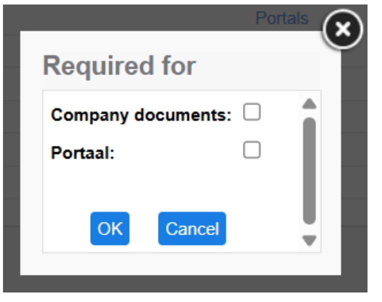
Hyperlink (fixed) This portlet allows a fixed list of links to be made available. The list is managed by the administrator.

RSS/Atom feed (fixed) Portlet that is populated with the content of an RSS feed. The URL to the feed can be set by the administrator.

RSS/Atom feed (free) Portlet that allows the end user to independently define an RSS feed in a portlet.

13.1.2 Required

With this option, a portlet can be made mandatory within the selected portal and cannot be removed from the portal by the user. By selecting the **Portals** option, the list of available portals is displayed, the administrator can specify for which portal the portlet is mandatory.

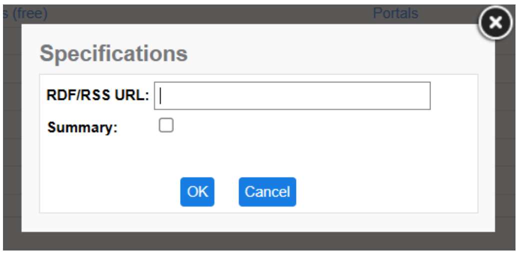


13.1.3 Available to

With this option it can be indicated which OpenIMS user groups are allowed to use the relevant portlet.

13.1.4 Specifications

Via the specifications, type parameters can be entered per portlet. For a PHP portlet, this is a window for placing program code, while for an RSS feed, it offers the possibility to insert an RSS feed.

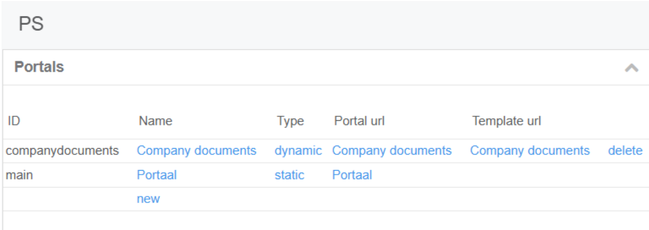


13.2 Portals

Various portals can be defined in the portals section.

Each portal has a number of properties (see image above). These are:

- IS
- Name
- Type
- Portal URL
- Template URL



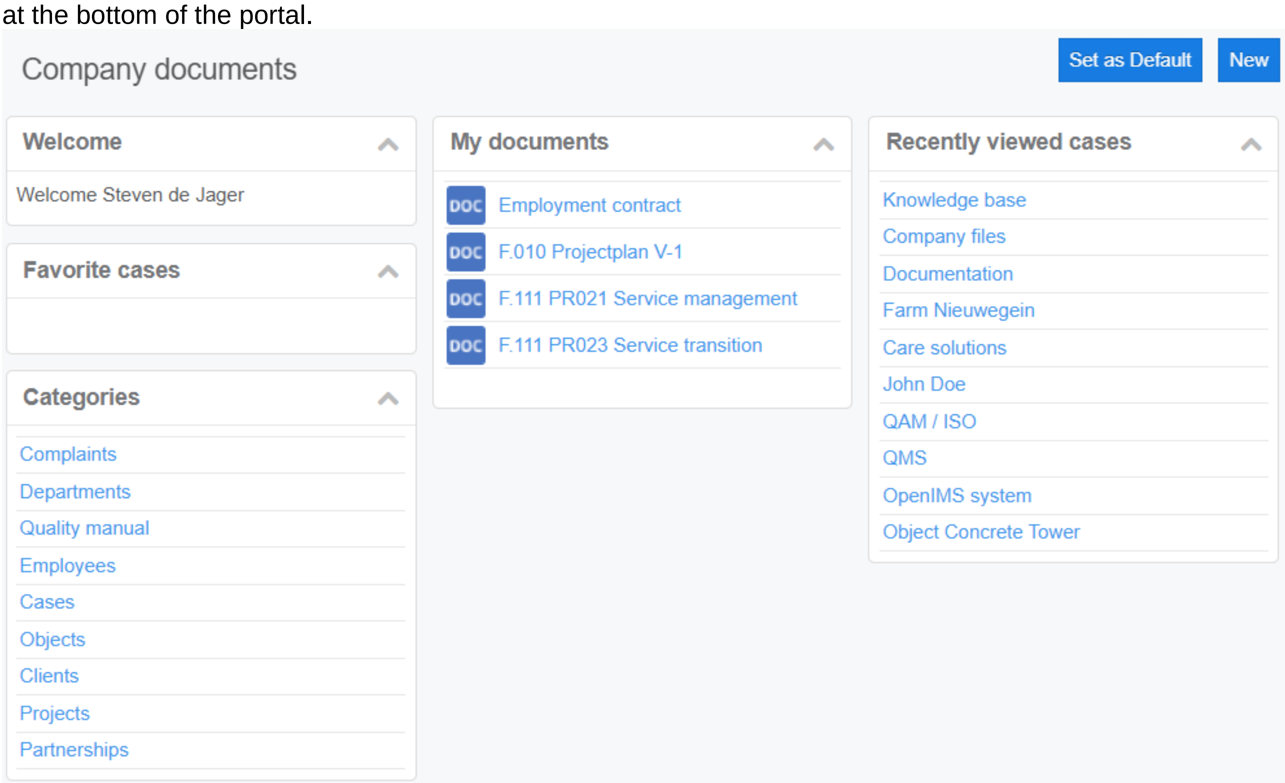
13.2.1 Portal Types

Static portal A static portal contains a fixed portal layout. The portal is organized and configured by the administrator. Changes or updates to portlets made by the administrator are implemented immediately.

An administrator can define the position and the portlets. The first image shows the Portal from the administrator's point of view, the second image from the end-user's perspective. Furthermore, the administrator has a feature at the bottom of the portal to add new portlets. This feature is also available to end-users in the dynamic portal. See the screenshot below.

Dynamic portal The dynamic portal gives the end-user the ability to determine the layout of the portal themselves and which portlets (including their position) are displayed. Static portlets can also be added to the dynamic portal.

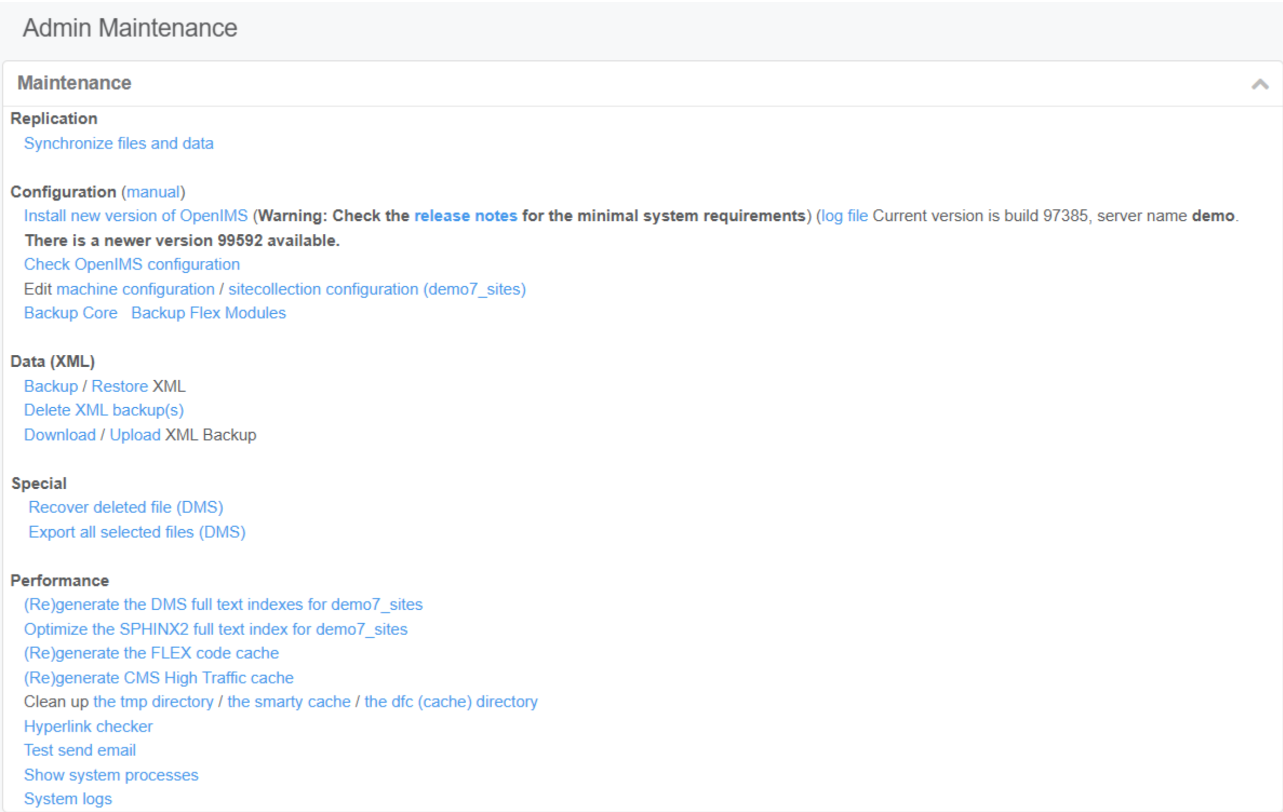
With the portal page template, a predefined configuration can be made available in advance. The end user can then customize this as they see fit, as shown below. The available portlets are displayed to the end user at the bottom of the portal.



14 MAINTENANCE

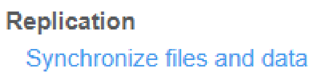
From the maintenance screen, an administrator can start various management activities. The following paragraphs described installing a new OpenIMS version, indexes, and cache. For an explanation of the other maintenance options, go to the website: https://doc.openims.com/.

Note: We recommend that you only start functions of the maintenance menu outside office hours.



14.1 Replication

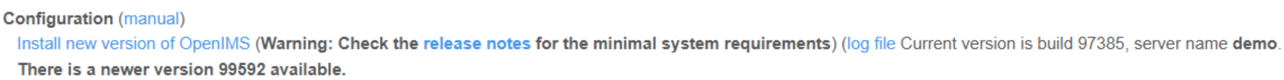
Using this feature, a replication can be started manually. Naturally, this feature must be configured.



14.2 Configuration

14.2.1 Install new version OpenIMS

OpenIMS was developed with the aim that the installation of a new version should proceed smoothly, quickly, and easily. You click on **Install new version of OpenIMS**; after confirmation with **OK**, the installation is started.



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

14.2.2 Check OpenIMS configuration

This OpenIMS self-check indicates the status of a number of important OpenIMS components (such as communication between the main server, the conversion machine, and/or extranet, if present).

OpenIMS configuration check
WARNING: Check if 'Selftest completed' appears

Access rights Apache **OK**
Disk space (10GB) **OK**
Internal XML backup (WARNING: does not replace external backup!) **OK**
Fast scedule table **OK**
Data compression memory (gzip / gunzip) **OK**
Data compression file (gzip / gunzip) **OK**
Data compression (gzcompress / gzuncompress) **OK**
Data compression (unzip / zip) **OK**
Conversion (doc -> txt) **OK**
Conversion (xls -> txt) **OK**
Conversion (ppt -> txt) **OK**
Conversion (pdf -> txt) **OK**
Encoding conversion (pdf -> txt) **OK**
Conversion overruledetermineip **WARNING**
Document analysis (diff) **OK**
7Zip for conversion .msg files **OK**
Archiving (tar) **OK**
PHP settings: **OK**

14.2.3 Edit machine configuration / sitecollection configuration

These files modify the behavior and available functionalities of OpenIMS. Default configuration parameters are set here for connections, the OpenIMS system configuration, and the configuration of certain properties of components to be displayed to end users.

Note: modifying these files must be done with great precision; an incorrect modification can lead to stopping the product. Changes to configuration files, the **myconfig** and **siteconfig**, are recorded in a log. It is tracked when (and by whom) the configuration is modified, exactly what has been modified, and an additional history of all versions is also created in the tmp directory.

14.3 Data (XML)

Note: The internal XML backup is separate from the organization's regular backup/restore procedures.

Data (XML)
Backup / Restore XML
Delete XML backup(s)
Download / Upload XML Backup

14.3.1 Backup/Restore

Backup By clicking this option, the creation of a full OpenIMS XML backup is started immediately.

Restore With this feature, you can restore an XML backup. A full XML backup of OpenIMS is created daily, which you can click on for performing a restore.

Please note: restoring an older backup will result in the loss of documents and/or OpenIMS application code changes.

14.3.2 Delete XML backup(s)

You will see an overview of the available XML backup files. After selecting the XML backup file to be deleted, it will be deleted immediately.

14.3.3 Download/Upload XML backup

Download This allows you to download an existing OpenIMS XML backup from OpenIMS to your local PC.

Upload You can upload an OpenIMS XML backup to OpenIMS via your local PC. Subsequently, you can restore the relevant XML backup file using the restore option.

NB: OpenSesame ICT advises organizations to follow a sound backup procedure at all times and to adhere to at least the following principles:
- Daily offline backups, including validation of whether they were successful;
- Daily synchronization of backups to a second location (off-site);
- Backup retention period of two months;
- Annual execution of a cold restore test;
- Optional snapshots for performing system and software updates.

14.4 Special

Special
- Recover deleted file (DMS)
- Export all selected files (DMS)

14.4.1 Recover deleted file (DMS)

OpenIMS offers the ability to restore files that have been deleted by users. This option is only available to administrators via the maintenance screen.

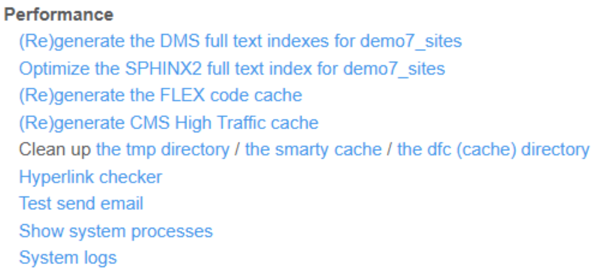
Step	Instructions
1	Go to the system log (Admin > System Logs) named **deleted objects**, where you can see who deleted what and when.
2	Click on the date the document in question was deleted. The **deleted objects** log can be used to determine the document's ID.
3	Click on the document in question. The document's ID (32 characters) is also displayed there.
4	Copy the ID of the document in question.
5	Navigate to **Maintenance** via the **Admin** menu.
6	Click on **Recover deleted file (DMS)**. The screen that appears asks for an ID which u copied from the log.
7	Paste the copied ID into the field and press **OK**. The system will now jump to the recovered document in the DMS, and the document is available again.
8	Check if the location and metadata have been copied correctly.

<u>Please note:</u> This is a best effort feature; the only guaranteed way to recover deleted documents is to restore a backup (preferably on a test environment).

14.4.2 Export all selected files (DMS)

This feature can be used to download large quantities of documents from OpenIMS to a directory on the OpenIMS server. These files can then be placed in a designated storage location.

14.5 Performance



(Re)generate the DMS full-text indexes for <local site name> (this/all site collection(s))
If you set up a new system or synchronize a standby system with a production server, the search index will need to be rebuilt. With this option, you can rebuild the search index. This function builds the index for CMS, DMS, and EMS.

During the (re)generation of the indexes, the search function will not return complete results. It is therefore recommended to perform this action outside of office hours. The documents entrusted to OpenIMS in the production environment are automatically indexed immediately.

Optimize the SPHINX2 full-text index for <local site name>
If SPHINX is used as a search engine, you can use this feature to optimize the existing search index for use with SPHINX.

(Re)generate the FLEX code cache
With this option, all XML indexes are removed. OpenIMS will then rebuild them during use. This can lead to extreme delays in OpenIMS. The best way to use this feature is outside of office hours. Immediately after removing all indexes, the most frequently used functions must be called to rebuild the corresponding indexes.

(Re)generate CMS High Traffic cache
With this option, all cached web pages are removed and immediately rebuilt.

Clean up the tmp directory
With this option, the OpenIMS tmp directory is cleaned up. This is a different directory than the operating system's tmp directory. This option allows you to free up disk space. If you use this option, the system logs will be deleted.

Clean up the smarty cache
This option cleans up the OpenIMS smarty cache. This cache must be cleared when installing a new OpenIMS version; this prevents inconsistent behavior after an update.

Clean up the dfc (cache) directory
This option clears the OpenIMS cache. This may lead to some delay in complex functionalities such as history and comparing large text files.

Hyperlink checker
Link to a webpage with detailed explanation and the option to download the hyperlink check software. Note: read the explanation carefully before starting the hyperlink check.

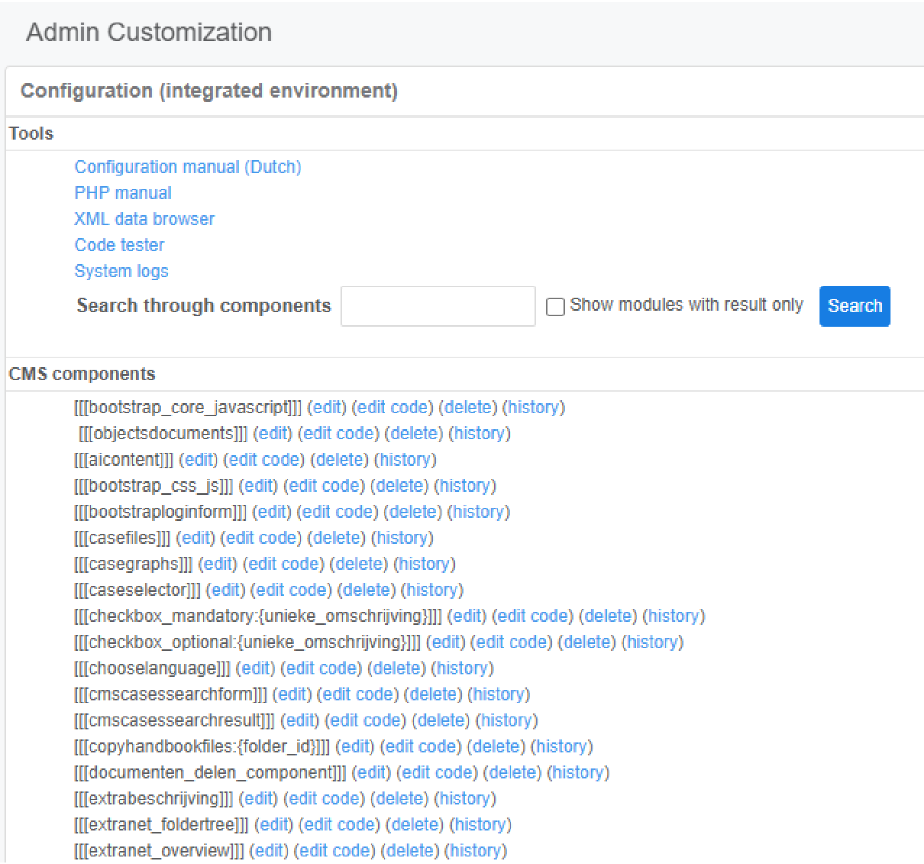
Test send email
This option allows you to send a test email. You can specify the email address, subject, and content.

Show system processes
You will receive an overview of all running background processes. Processes can be paused, resumed, or deleted. A deleted process is stopped and removed from this overview.

System logs
Here you will find an overview of the various logs active within OpenIMS. Customer-specific logs may also be found below.

15 CUSTOMIZATION

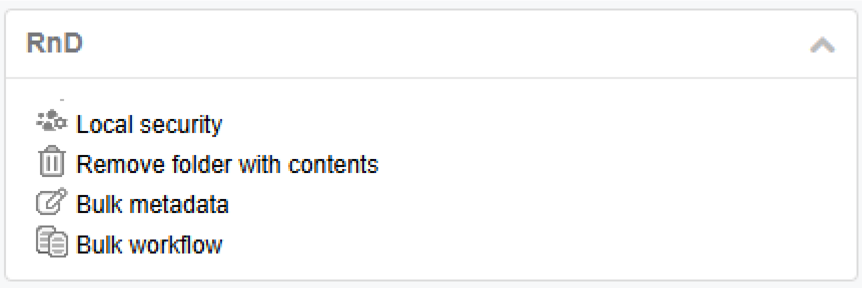
OpenIMS is a component-based platform. In addition, account has been taken of the fact that every organization has different requirements. Therefore, a special development environment is available, called **Customization**, where developers can develop special components.



More information regarding the OpenIMS development environment is available on our website https://doc.openims.com/, including a manual for developers.

16 DMS ADMIN FUNCTIONALITY

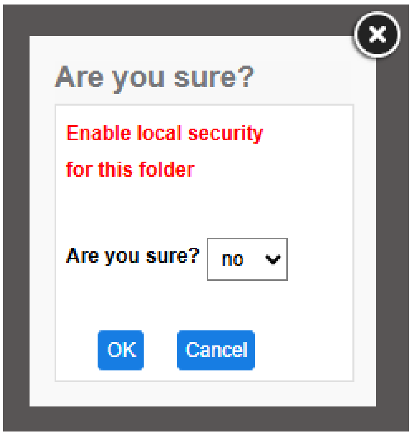
Within OpenIMS DMS, a number of functions are available to which only users with admin rights have access. These options are located at the bottom left of your screen. These are:



Note: All functions work within the current folder, including all underlying subfolders. This means that you must always first select the folder on which you want to perform the action. After selecting the folder, these options become visible.

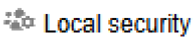
16.1 Local security on a folder

By default, a user placed within a user group has the same rights throughout the entire DMS. However, it is conceivable that a specific user in a particular project (case or folder) has a different role or rights.



To ensure that a user can only do what he/she is specifically authorized to do with documents, a feature is available to distribute specific rights at the folder level to individual users and/or user groups. The feature that makes this possible is called **local security**.

You can enable local security via the option

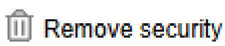


After enabling, a red dot will appear on the folder you selected to secure.

This means that from that moment on, no user except the administrator has rights in the relevant folder and its subfolders. It is possible to set up new local security in a subfolder with different rights than the parent folder.

Users must be reassigned to the folder with local security using the existing authorization model with groups and workflows. Therefore, you do not need to create new workflows or user groups to secure a folder.

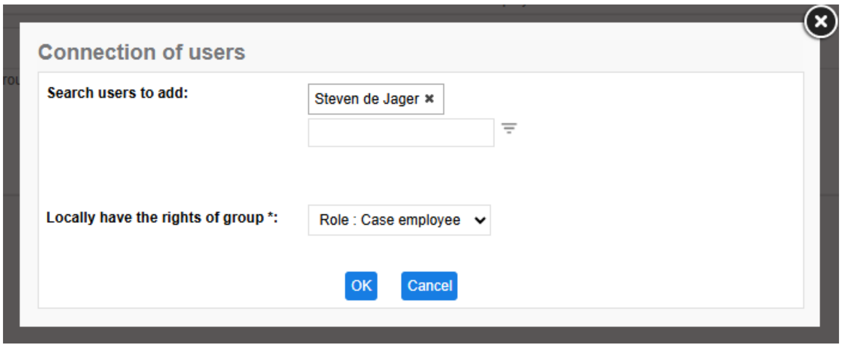
You can disable local security via the link:



16.1.1 Add local users

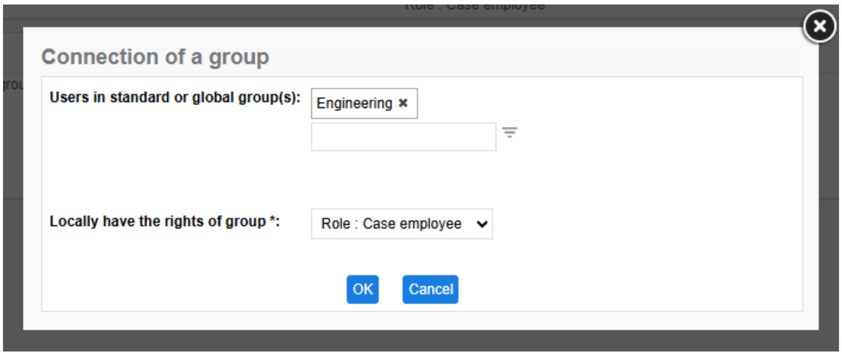
After security has been applied to a folder, you can grant access to this secured folder via **Edit security**.

In local security under groups, you can **Add new connection** to locally grant a user group the rights of a group role; additionally, an individual user can be assigned group roles via **Add users** so that these apply to the user within the secured folder.



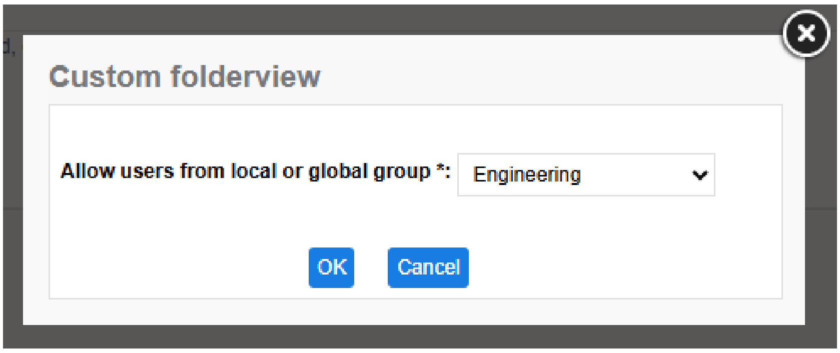
16.1.2 Adding local user groups (connection)

In some situations, it is more convenient not to distribute rights via local security at the user level, but to an entire user group. The advantage of this is that all users in a standard user group are added immediately, and if a user is removed from the standard user group, they no longer have any rights on the locally secured environment.



16.1.3 Folder tree security

If you want a folder to be invisible to certain user groups, you can include it in the list for folder tree security.



16.1.4 Local administrator

It is possible to grant a user or group administrative rights on a locally secured environment. The local administrator can add or remove users or user groups from local security and use user groups that have been designated as a role with the Locsys right by the administrator.

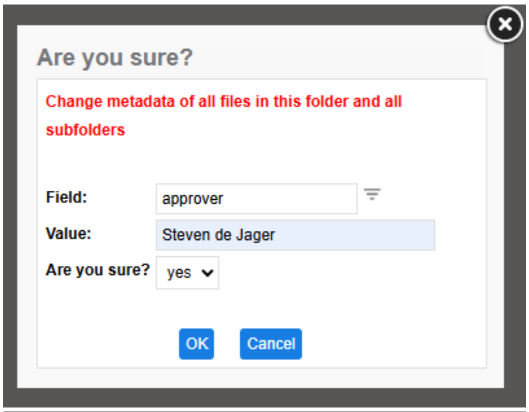
16.2 Delete folder with contents

As an administrator using this function you can delete an entire folder structure.

Remove folder with contents

Please note: This is a very powerful method for deleting documents and folders; therefore, there is no way to restore document or folder structures after using this feature.

16.3 Bulk metadata



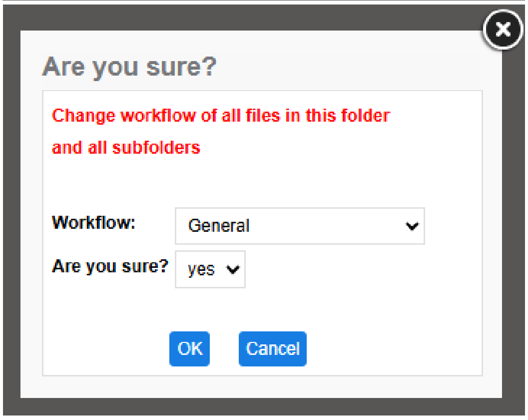
This function allows you to change the value of a specific metadata field for all documents in a particular folder and subfolders at once.

To do this, first select the folder and then the link:

Bulk metadata

Note: The system will apply the changed information to all documents, including those in subfolders.

16.4 Bulk workflow



You can use this mechanism when you want to link all documents in a folder and subfolders to a single new workflow.

To do this, first select the folder and then the link:

Bulk workflow

Note: The system will apply the changed workflow to all documents, including those in subfolders.

16.5 Bulk operation

If configured, this feature is intended for executing a specific functionality, to be defined using a PHP script, on all documents in a folder and subfolders.

Note: This component is not available when working on an Apple device.

16.6 Bulk upload and import

If configured, these features are available to import files from, for example, the local PC into the DMS. The bulk upload and import take place via a folder on the server. These features are intended for importing files, optionally including the folder structure. This functionality is described in more detail in the standard OpenIMS Document Management manual.

17 DOCUMENT TEMPLATES (DMS)

With OpenIMS DMS, you can add metadata to documents using placeholders. This metadata originates from the properties screen of the document in question. This allows document templates, such as standard letters or contracts, to be populated with predefined information from OpenIMS or potentially from external information sources, such as an ERP or CRM system.

To automatically incorporate information from the system into a document, some document types must be provided with an OpenIMS macro. OpenIMS has various macros available (Excel, AutoCAD, Visio). The Excel macro will be explained in this manual. This is not necessary for Word, as it is based on XML data.

The metadata that can be placed in a document depends on the definition within the workflow used. The metadata fields are linked to a workflow (from the Admin environment). The macro is usually included in a number of document templates. New documents created based on one of these templates are then immediately provided with the macro.

Client Settings
Users opening a document from OpenIMS DMS containing a macro must have the following settings on their PC.

Note: This also applies to website visitors if you make documents from the DMS available via the website that contain the macro.

Conversion Server
If you use a PDF conversion server for automatic document conversion, this conversion server must also be configured correctly.

Macro Security
If you use signed macros, manuals with screenshots of the necessary user actions are available at https://doc.openims.com (Beheer > Ondertekende macro), so you can prepare your users.

Standard fields
Every document within OpenIMS contains a number of standard metadata fields that can be retrieved using the macro. These are:
- Document name: OpenIMS Administrator Manual 9.0
- Document version: 1
- Current owner: Steven de Jager
- Last modified: 27 augustus 2026 and August 27th 2026.

Additionally, organization-specific metadata fields can be added, such as department, unit, project number, document number, and the like (via the Admin environment).

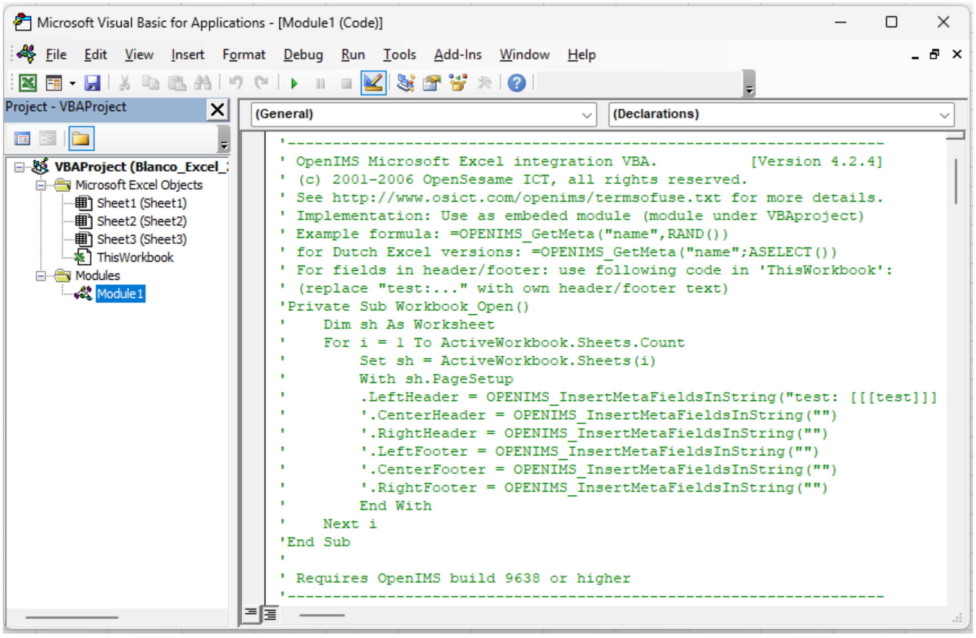
17.1 Microsoft Excel macro

17.1.1 Standard macro

Always use the current version of the macro for Microsoft Excel; you can download msexcel.txt via our support page:

- https://doc.openims.com/beheer/ondertekende_macro

1. Select the entire macro (text) and copy it to your PC's clipboard.
2. Open the Microsoft Excel document that needs to be filled with meta information.
3. Go to the **Developer** tab (if added to the ribbon) and click on the button **Visual Basic**.
4. In the Visual Basic Editor **Insert** menu, choose the option **Module**.
5. An empty module will now be prepared under the Modules folder; select it.
6. Place the macro code in the right tab using **cut/paste**.
7. Then close the Microsoft Visual Basic screen.
8. You can now place the metadata fields.



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17.1.2 Signed Macro

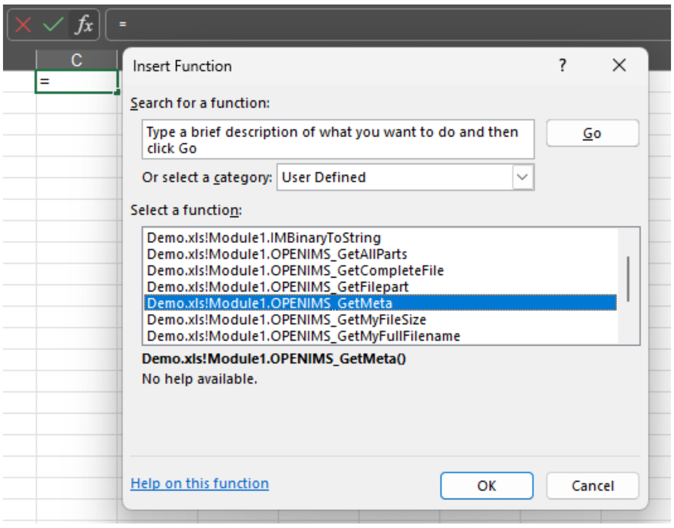
It is not possible to add the signed macro to a document yourself, as this would result in the loss of the signature. Instead, you must retrieve a blank document that already contains the macro via the link: https://www.openims.com/install/blanco.xls

If you wish to create multiple templates, you must make multiple copies of this blank document. Each copy will contain the macro. Next, apply the desired formatting, default content, and metadata to each copy.

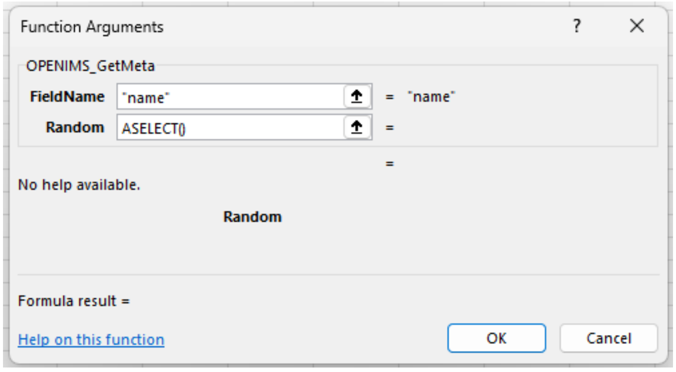
17.1.3 Placing Metadata Tags

You can include the metadata tags in the Excel document.

1. Go to the cell where you want to display the meta information.
2. Click on **Insert Function**.
3. Select the option: **User Defined** from the combobox.
4. Select **OPENIMS_GetMeta** and click **OK**.



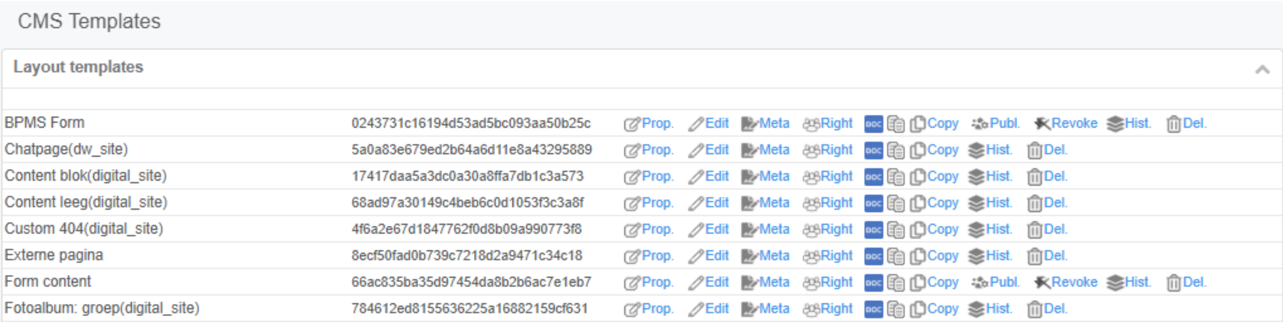
5. Enter the name of the metadata field in **FieldName**.
6. Enter the value **ASELECT()** or **Random()** in the field **Random**, depending on the version of MS Excel.
7. Close the MS Excel document, enter the relevant meta-information (Properties screen), and reopen the document.
8. All metadata tags will now be dynamically replaced.



18 DESIGN TEMPLATES (CMS)

Within OpenIMS CMS, design, content, and components (code) are completely separated. This is a major difference compared to other CMS systems, where code is usually placed within the layout or design template.

The strength of OpenIMS lies in the fact that users can choose which tool to use. The developer can launch templates in any HTML editor. This means that Dreamweaver or Notepad++ can be used without any problems to create and manage a design template.



CMS Templates

Layout templates

BPMS Form	0243731c16194d53ad5bc093aa50b25c	Prop. Edit Meta Right Copy Publ. Revoke Hist. Del.
Chatpage(dw_site)	5a0a83e679ed2b64a6d11e8a43295889	Prop. Edit Meta Right Copy Hist. Del.
Content blok(digital_site)	17417daa5a3dc0a30a8ffa7db1c3a573	Prop. Edit Meta Right Copy Hist. Del.
Content leeg(digital_site)	68ad97a30149c4beb6c0d1053f3c3a8f	Prop. Edit Meta Right Copy Hist. Del.
Custom 404(digital_site)	4f6a2e67d1847762f0d8b09a990773f8	Prop. Edit Meta Right Copy Hist. Del.
Exteme pagina	8ecf50fad0b739c7218d2a9471c34c18	Prop. Edit Meta Right Copy Hist. Del.
Form content	66ac835ba35d97454da8b2b6ac7e1eb7	Prop. Edit Meta Right Copy Publ. Revoke Hist. Del.
Fotoalbum: groep(digital_site)	784612ed8155636225a16882159cf631	Prop. Edit Meta Right Copy Hist. Del.

18.1 Templatemanagement

Templates can be found in the **Templates** option in the CMS menu. Behind the templates are a number of icons that offer the following functionality:

	Prop. - Properties of template	The name of the template.
	Edit - Layout of template	Edit the template using an HTML editor of your choice, for example: Dreamweaver, Notepad++.
	Meta - Metadata of template	Define metadata for the properties field.
	Right - Rights to use the template	Which user groups are allowed to use this template.
DOC	Change the standard page	Defined content can be set up per template. For example, you can set up a standard job vacancy text, where only the vacancy-specific texts are added, or even a ready-made web form.
	Replace the standard Word, Excel and PowerPoint pages by blank pages	With this option, you can replace all defined pages with a blank page.
	Copy - Copy template	This allows you to make a copy of a template.
	Publ. Publish template	After modifying the template, a new version is created; a preview of the new version can be viewed in Draft mode. If you are satisfied with the result, the new version of the template can be applied so that the web page uses it from now on. The web pages that use the templates will then adopt the layout of the new template.
	Revoke - Remove template in preview	If you are not satisfied with the changes made, the last approved version of the template can be restored. This is the last published version.
	Hist. - History	Using this option, a previously published version of the template can be restored.
	Del. - Remove template	Delete the template.

18.2 Editing templates via HTML-editor

To modify a template, click on the **Edit** option to open the HTML editor.

save | close | Direct EDIT Element: < /dw01_sites/preview/templates/e24ff6240037ad8e878cae678f6bdb2a/template.html > [ace help]

```
<head>
<title>[[[longtitle]]]</title>
<META http-equiv="Pragma" content="no-cache">
</head>

<body topmargin="0" leftmargin="0" marginheight="0" marginwidth="0">

<p>[[[coolbar]]] </p>
<center>
[[[verticalmenu]]]<br>
[[[clickpath]]]<br>
[[[content]]]
</center>
</body>

```

You can then start making changes, and when you are finished, close the HTML editor with the **Save** button and the modified version will be transferred back to OpenIMS CMS, creating a new version of the template.

You can choose to publish this change immediately or revert it, but of course, you can first preview the modified version of the template in Draft mode.

Please note: to edit templates, you must install the **OpenIMS Transfer Agent**.

18.3 Preview of a modified template

The templates within OpenIMS are put into production using the publication mechanism. This allows the designer to first check whether the modified template meets their requirements before releasing it. Browse the site in Concept mode to the page where the template is applied.

Note: You can only preview a template in Concept mode.

18.4 Working with placeholders

OpenIMS uses HTML-like tags (placeholders) to add specific design functionalities to a page using templates. Examples include navigation structures, such as displaying the main menu or a click path.

Examples of placeholders are:

Placeholder name	Description
coolbar	This placeholder is only visible in Concept mode, but is mandatory because it places the CMS toolbar at the top of the page.
content	The content field contains the content, as you can manage it using Microsoft Word.
longtitle	This is the long title of the page (edit via the properties screen).
shorttitle	This is the short title of the page (edit via the properties screen).
Verticalmenu	Vertical menu. A menu that expands vertically.

The functionality of the HTML-like tags (placeholders) can be created or modified by a developer. This has the advantage of preventing any mixing of styling and (source) application code. These tags are developed in the OpenIMS (CMS Components) configuration environment. As a result, changes to the functionality can be made in one place, which will then be adjusted in all places where it is used on the site. The application code is therefore not incorporated into the styling templates, but into a special general OpenIMS Components module.

OpenIMS ensures that styling, content, and application code are processed into an HTML page understandable to most common browsers. This allows a developer to focus entirely on providing the correct functionality, while a designer processes the styling templates.

A placeholder represents an OpenIMS Flex component within a template. A developer places a placeholder at the location where a piece of logic needs to be executed. A designer can define a placeholder as follows: placeholder name. This placeholder can be placed anywhere in a template, but also within the content.

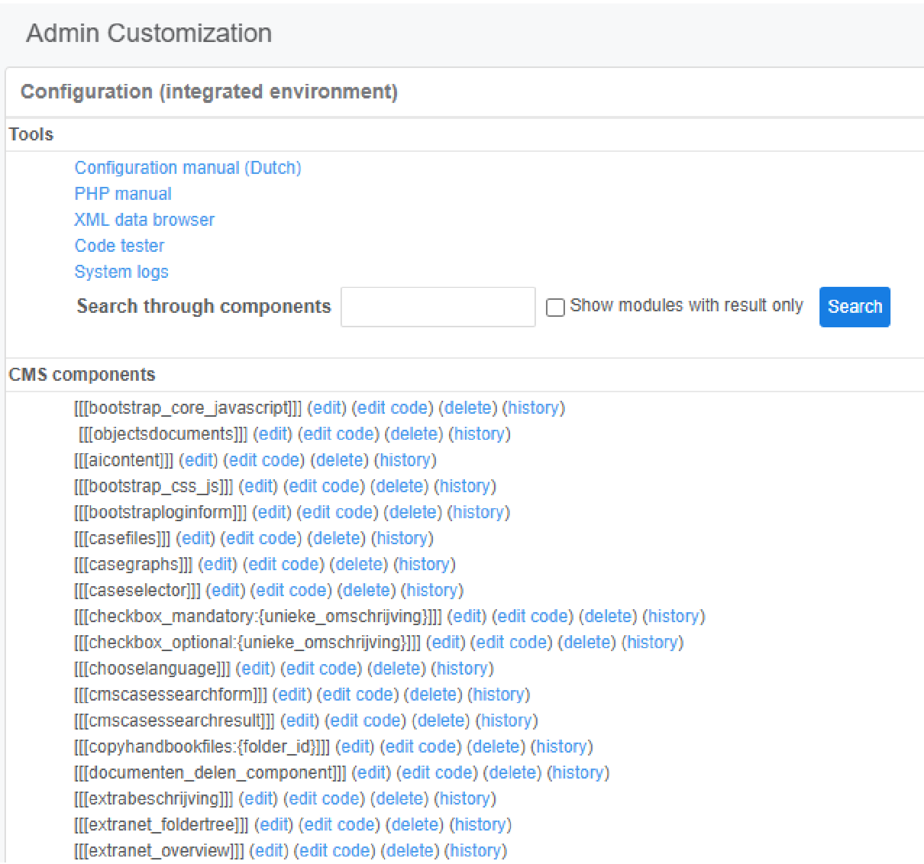
18.5 Metadata placeholders

You can also incorporate metadata fields into a template. This metadata is linked to the properties of a web page. For example, you can define a summary for each page that you manage via the properties screen and have its contents displayed within the content.

In the OpenIMS CMS template, the designer only needs to place the metadata field as a placeholder, for example, summary. OpenIMS CMS will then ensure that the content of this metadata field is displayed at that location.

18.6 Component placeholders

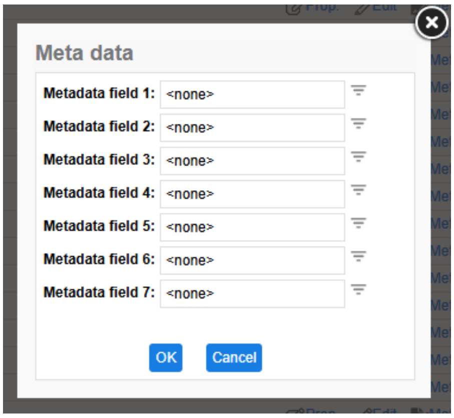
In the **Customization**, available via the **Admin** menu of OpenIMS, a developer can work on navigation components of a website. The name of the component can be incorporated as a placeholder in the template. This has the advantage that all components are maintained in a central location and all changes are made in just one place, without having to modify all templates.



Under the heading **CMS components**, you will see an overview of all available navigation components that you can incorporate into a template. Naturally, you can also incorporate non-existent placeholders in anticipation of their realization; OpenIMS will then present the regular text.

18.7 Linking metadata fields to a CMS template

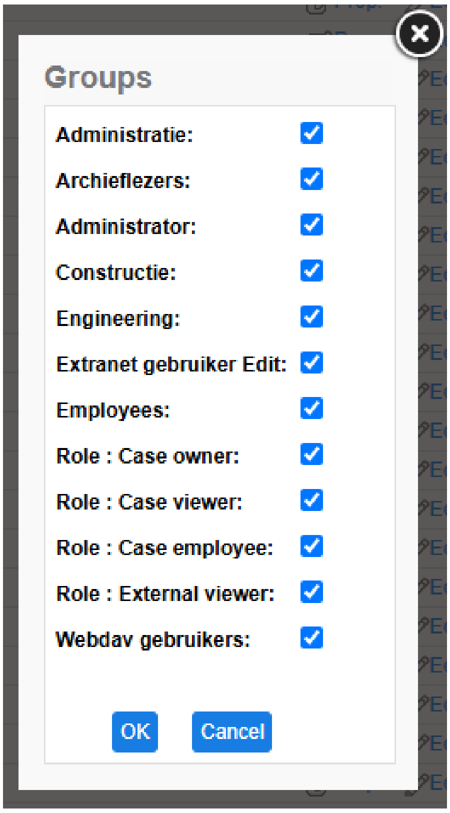
You can define at the CMS template level which metadata fields should be available. After clicking on the **Meta** option, you will see an overview of all available fields. You can assign fields to the template as you see fit. You can also add metadata fields to templates retrospectively. These metadata fields become visible when you select the properties of a web page.



18.8 Permissions

Because users often maintain only a specific part of the website, they do not need to have access to all templates. Therefore, you can define at a central level which user groups are allowed to use a specific template.

Note: By default, all user groups have the right to use a template.

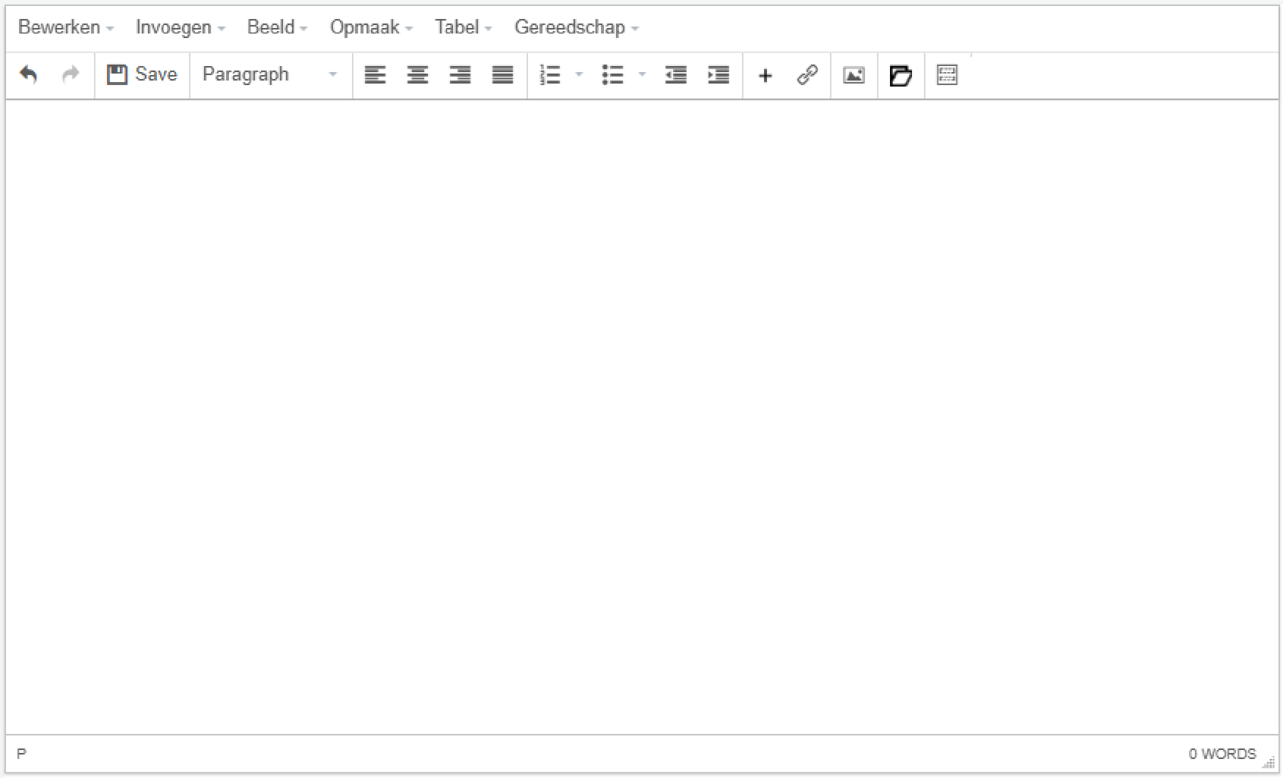


18.9 Editing web content templates

When you create a new web page, you must determine which template you want to use. In addition to the design, a template also contains a content template. This can be empty (by default), but can also already contain some content. One content template can be defined per template. Depending on your personal settings, you can work with the inline editor TinyMCE or with Microsoft Word.

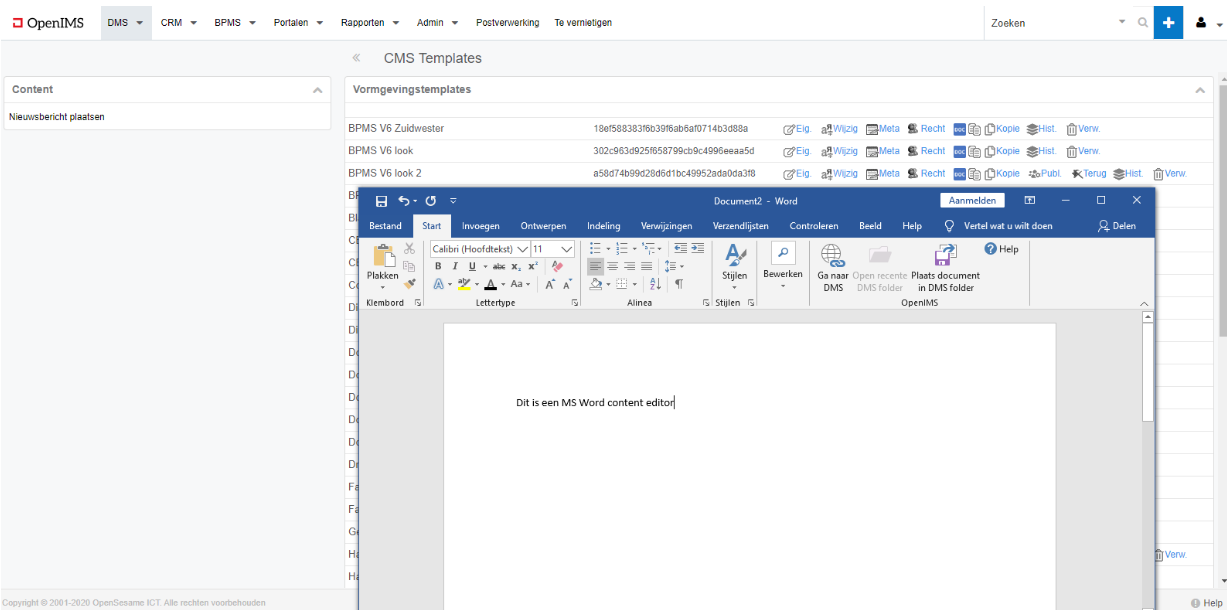
18.10 Editing content with TinyMCE

A separate manual for TinyMCE is available in which all functions are explained.



18.11 Editing content with Word

When you work with Microsoft Word, the content editor is Word. When you use Word, you need the Transfer Agent.



18.12 Templates and web forms

It is also possible to incorporate a web form into a template. This means that when creating a new page, a user selects the form template, and at that moment, content from the defined form is placed on the page.

Making use of this you can provide a standard layout for a form and pre-enter the default fields. A user can then add new fields or remove existing ones at their own discretion.